



Work Instruction

Create Standard Memo Lines

Purpose

Use this procedure to create standard memo lines. Memo lines are predefined lines that can be used when creating manual invoices.

Prerequisites

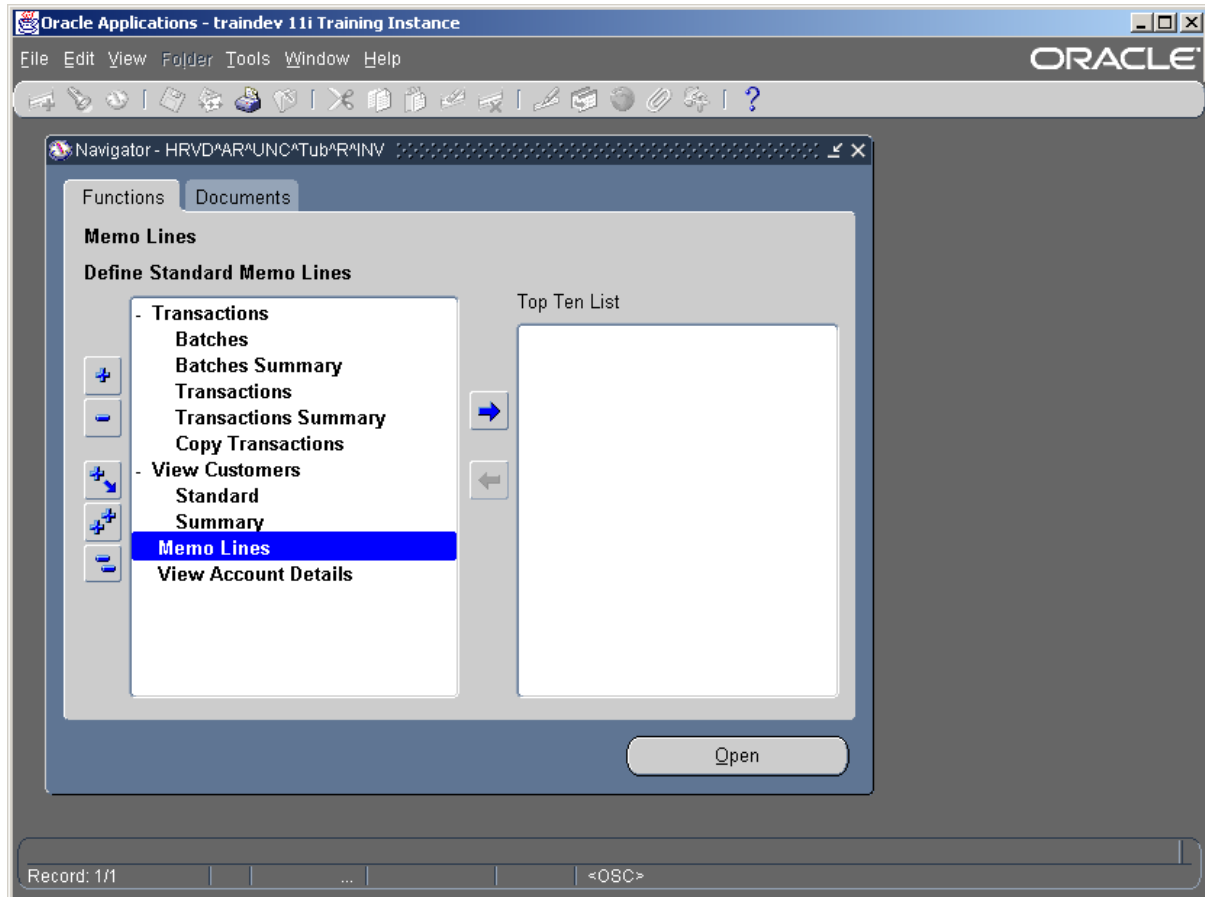
You have been assigned the appropriate AR responsibility (*HRVD^AR^TUB^ORG^INV*).

Helpful Hints

All memo line data can be edited, if needed, when you use a standard memo line during invoice entry.

Procedure


Oracle Navigator




1. Double-click **Memo Lines** to start this procedure.




Standard Memo Lines (HARVARD)

2. Complete the following required or optional fields:

Field Name	R/O/C	Description
Name	R	<p>A name for the memo line using the following convention: tub abbreviation, org abbreviation or other indicator (i.e. transaction type name), brief description of the item. Consistent use of naming conventions will insure easy and accurate retrieval during invoice entry.</p> <p>Example: HMS NUC Test Tubes</p>
Description	R	<p>The item description, which will print in the description field of the customer invoice.</p> <p>Note: Once you have created a memo line, you can edit its description during invoice entry if needed.</p>
Type	R	<p>Line from the  drop down menu</p> <p>Note: The system defaults to this selection.</p>
Unit List Price	O	<p>The price associated with the memo line</p> <p>Note: During invoice entry you can edit the unit list price as needed after selecting the standard memo line.</p>

Field Name	R/O/C	Description
Unit of Measure	O	The unit of measure associated with this memo line Note: Use the list of values button  to select the unit of measure you want.
Revenue Account	O	A Valid 33-digit CoA coding. Note: When selecting a standard memo line during invoice entry, only the object code, if entered , will default into the account coding for the invoice line.
Active Date (first field is start date)	R	The system defaults to today's date
Active Date (second field is end date)	O	Enter the last date the memo line should be used on Note: To deactivate a memo line, navigate to the Standard Memo Lines window, query the memo line you want to deactivate, and enter today's date in this field.

3. Perform one of the following:

If You Want To	Then	Go To
Create additional memo lines	Click  .	Step 2
Return to the Navigator screen and access another form	1. Click  . 2. Close this form.	Result
Exit	1. Click  . 2. Select File → Exit Oracle Applications.	Result

4. You have completed this task.

Result

You have created a standard memo line to use when creating new manual invoices.