Changing the Chartfield on an Invoice

Steps

1. Log into iLab at https://ufl.lab.agilent.com/
2. Click on the hamburger bar in the top left corner
3. Then click on Invoices
4. Search for the invoice you would like to make the change to
5. Select the magnify glass on the ride side.
6. Click on the Select Payment Method link
7. Select UF chartfield
8. Select All charges on the invoice (if applicable)
9. Select the correct chartfield from the drop down menu
10. Click on Set UF Chartfield

- Make sure that the invoice is under 7 days old
- Only a financial contact or PI can change payment methods
- Chartfields need to be added to the lab’s account before they will show up in the drop down menu
- Both you and the invoice owner need to have permission to use the chartfield for it to show in the drop down menu