Changing the Chartfield on an Invoice
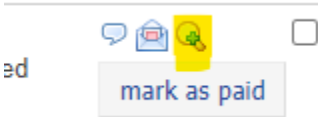
Steps

1. **Log** into iLab at https://ufl.ilab.agilent.com/ Click on the
2. **hamburger bar** in the top left corner
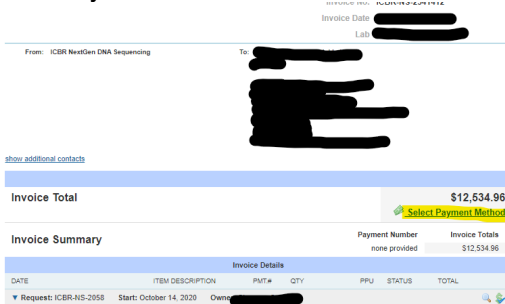3. Then click on **Invoices**
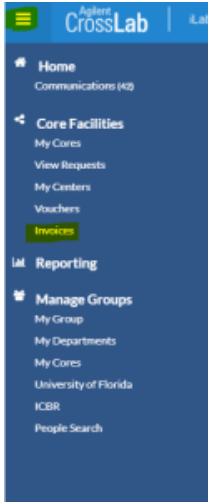
   a.

4. Search for the **invoice** you would like to make the change to
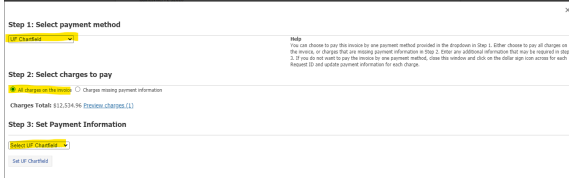5. Select the **magnify glass** on the ride side.

   a.

6. Click on the **Select Payment Method** link

   a.

7. Select **UF chartfield**
8. Select **All charges on the invoice** (if applicable)
9. Select the correct chartfield from the **drop down menu**

   a.

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