
Owner in Invoice created from file (Excel or EDI), how is it determined?

- **Product:** Alma
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Question

What determines the Invoice Owner, for example, when loading invoices by EDI or Excel file? Where in the file is it possible to specify the owner (Library, or Institution)?

Answer

If all Invoice Lines from an EDI invoice are linked to PO Lines from a specific library, then the invoice will be created with this library as Owner.

For Excel, there is no need (or way) to put an expressed literal invoice line owner in the Excel sheet, same logic applies:

- If all POLs in the invoice have the same library then that library will be the invoice owner.
- If all POLs in the invoice do not have the same library then the institution will be the invoice owner.

Note: From the July 2020 Release, it is possible also to impact or edit the Owner of the Invoice. When creating an invoice manually, the Owner is determined by the operator's Invoice Roles and Scopes.

Additional Information

Click here for more about "[Creating an Invoice From a File](#)".

See more about "[Creating Invoices](#)".

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