Discover how to search for and filter invoice items in WorldShare Acquisitions.

You can search for bibliographic and non-bibliographic invoice items on the Invoice Items screen.

- Bibliographic invoice items are items that have been ordered first. They are tied to an order item and are typically for bibliographic materials like books, DVDs, journals, ejournals, and ebooks.
- Non-bibliographic invoice items are added directly an invoice, without a corresponding order. They do not have bibliographic information, only a description. They are often for non-bibliographic materials, such as library supplies and furniture, or for other items not in WorldCat or the knowledge base (e.g., memberships).

View all invoice items

1. Navigate to Invoices > Invoice Items.
2. Click Search. All invoice items appear.
3. Click the Title/Description or Invoice Item Number to view or edit the invoice item.

View invoice items for all subscription periods

You can view invoice items related to all years of a subscription.

1. On the left navigation, click Orders > Order Items.
2. Click Search. All order items appear.
3. Click the title of an order item.
4. Click the Invoice tab. Invoice items for the current subscription period display by default.
5. Select the Show invoice items for all related subscription periods checkbox to view invoice items for all years of a subscription.

Search invoice items

Use the search box to search invoice items.

1. From the list, select an index to search and type the search term in the box.
2. Click Search.

Show/hide columns

You can choose the columns that appear.
1. Click the **gray gear button** (⚙️) above the right-most column.
2. In the Show Columns window, select or deselect the columns you want to show or hide.
3. Close the Show Columns window by clicking anywhere outside it.

### Available invoice item columns

#### Invoice items columns - Table

<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget</td>
<td>The budget period of the fund assigned to the item. All budget periods (past, present, and future) appear in the list.</td>
</tr>
<tr>
<td>Custom Fields</td>
<td>Click the <strong>Custom Fields button</strong> to edit the custom fields for the invoice item.</td>
</tr>
<tr>
<td>Date Created</td>
<td>Date the invoice item was created.</td>
</tr>
<tr>
<td>Date Paid</td>
<td>Date the invoice item was paid.</td>
</tr>
</tbody>
</table>

#### Disencumbrance Method

<table>
<thead>
<tr>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>By Amount</td>
<td>Item was invoiced partially and disencumbered items are based on the amount paid for the order item.</td>
</tr>
<tr>
<td>By Percentage</td>
<td>Item was invoiced partially and disencumbered items are based on the percentage assigned to the invoice item.</td>
</tr>
</tbody>
</table>

#### Expenditure Type

<table>
<thead>
<tr>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit</td>
<td>A credited item</td>
</tr>
<tr>
<td>COLUMN</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>TYPE</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td></td>
<td>decreases the amount paid from fund upon payment of invoice.</td>
</tr>
<tr>
<td>Debit</td>
<td>A debited item increases the amount paid from fund upon payment of invoice.</td>
</tr>
<tr>
<td>Debit Partial</td>
<td>A debited partial item increases the amount paid for the fund upon payment of the invoice but only reduces the encumbrance of the order item by the invoice item percentage. (For example, if invoiced at 50%, only 50% of the encumbrance amount will be disencumbered.)</td>
</tr>
<tr>
<td>Refund</td>
<td>A refunded item decreases the amount paid from fund upon payment of invoice.</td>
</tr>
<tr>
<td>Supplemental</td>
<td>A supplemental item increases the amount paid without lowering the amount encumbered, because the order item being invoiced has already been fully disencumbered.</td>
</tr>
</tbody>
</table>

<p>| Invoice Date | Date invoice was created by vendor. |
| Invoice Item Number | Number used by vendor to identify a specific invoice item. |</p>
<table>
<thead>
<tr>
<th>COLUMN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Item Percentage</td>
<td>Indicates what percentage of the item has been invoiced.</td>
</tr>
<tr>
<td>Invoice Number</td>
<td>Number used by vendor to identify a specific invoice.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STATUS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Invoice item has not been paid.</td>
</tr>
<tr>
<td>Paid</td>
<td>Invoice item has been paid.</td>
</tr>
<tr>
<td>Ready for Payment</td>
<td>Invoice item is ready for payment.</td>
</tr>
</tbody>
</table>

| Notes            | Notes added to an invoice item by a user.                                   |
| Order Item Number | A system-generated identifier.                                               |
| Order Number     | Number assigned by system when order was created. Click the order number to edit the order. |
| Quantity         | Any number equal to or less than the total number of copies as listed here. |
| Title/Name       | The title/description of the item. To see all of an abbreviated title/description, place the cursor over the brackets and ellipses [...]. |
| Total            | The total of all prices, service and shipping charges, and taxes less any discounts. The total is updated as you make changes. |
| Vendor           | As you type, the field will suggest vendors from your list.                 |

**Filter invoice items**

Invoice items can be filtered using the filters at the top of the page.

1. Click one of the filter names below.
2. Select the **values** you want to apply. You can select one or more. When more than one value is selected, the system searches for any of the selected values.

3. Click **Apply**. Once the filter is applied, you can hover over the filter name to view the selected values.

4. *(Optional)* To remove the filter, click **Reset**.

### Show/hide filters

You can choose the filters that appear. Only some filters appear by default. Selected filters have a check mark next to their name.

1. Click **Filters** (at the top right of the screen).
2. To select or deselect a filter, click the **filter name**.
3. *(Optional)* You can search through the list of filters by entering a keyword in the search box.

### Available invoice item filters

**Invoice item filters - Table**

<table>
<thead>
<tr>
<th>FILTER</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Period</td>
<td>The budget period of the fund assigned to the item. All budget periods (past, present, and future) appear in the list.</td>
</tr>
<tr>
<td>Date Created</td>
<td>Date the invoice item was created.</td>
</tr>
<tr>
<td>Date Paid</td>
<td>Date the invoice item was paid.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>By Amount</td>
<td>Item was invoiced partially and disencumbered items are based on the amount paid for the order item.</td>
</tr>
<tr>
<td>By Percentage</td>
<td>Item was invoiced partially and disencumbered items are based on the percentage assigned to the invoice item.</td>
</tr>
<tr>
<td>Expenditure Type</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>Credit</strong></td>
<td>A credited item decreases the amount paid from fund upon payment of invoice.</td>
</tr>
<tr>
<td><strong>Debit</strong></td>
<td>A debited item increases the amount paid from fund upon payment of invoice.</td>
</tr>
<tr>
<td><strong>Debit Partial</strong></td>
<td>A debited partial item increases the amount paid for the fund upon payment of the invoice but only reduces the encumbrance of the order item by the invoice item percentage. (For example, if invoiced at 50%, only 50% of the encumbrance amount will be disencumbered.)</td>
</tr>
<tr>
<td><strong>Refund</strong></td>
<td>A refunded item decreases the amount paid from fund upon payment of invoice.</td>
</tr>
<tr>
<td><strong>Supplemental</strong></td>
<td>A supplemental item increases the amount paid without lowering the amount encumbered, because the order item being invoiced has already been fully disencumbered.</td>
</tr>
</tbody>
</table>

**Invoice Date**
Date invoice was created by vendor.

**Invoice Item Percentage**
Indicates what percentage of the item has been
### Invoice Status

<table>
<thead>
<tr>
<th>STATUS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Invoice item has not been paid.</td>
</tr>
<tr>
<td>Paid</td>
<td>Invoice item has been paid.</td>
</tr>
<tr>
<td>Ready for Payment</td>
<td>Invoice item is ready for payment.</td>
</tr>
</tbody>
</table>

### Quantity

Any number equal to or less than the total number of copies as listed here.

### Total

The total of all prices, service and shipping charges, and taxes less any discounts. The total is updated as you make changes.

### Vendor

As you type, the field will suggest vendors from your list.

---

**Invoice items belonging to a specific order item**

If you cannot find the invoice item you want under Invoices > Invoice Items, you can also search for the order item and locate the invoice items for that specific order item.

1. On the left navigation, click **Orders > Order Items**.
2. Click **Search**. All order items appear.
3. Click the **title** of an order item.
4. Click the **Invoice tab**. All invoice items belonging to the order item are listed.