OMNI AR/Billing: View & Edit a Bill

Use this tutorial to understand how to view and edit a bill that has not been invoiced, and how to view a bill that has been invoiced.

Note that bills not yet invoiced are located in a different area than bills that have been invoiced. Bills that have been invoiced are called Invoices, and cannot be altered. To correct an error on an invoiced bill, review the business process guide for Crediting & Rebilling (ABILL3).

**View & Edit a Bill not Invoiced**

1. Navigate to the Auxiliary AR/Billing tile

![Auxiliary AR & Billing tile](image1)

2. Navigate to the Auxiliary Billing tile

![Auxiliary AR & Billing tile](image2)
3. Search for your desired bill(s)/invoice
   a. Business Unit: AUX01
   b. Search by invoice ID, bill status, customer, and/or contract.

4. Select “Search.”

5. Select the desired invoice.
6. You will be brought to the billing header page:

![Billing Header Page]

7. Review bill status, customer, and other information on the header page.

8. In the “Navigation” drop down box, click on “Header-Misc Info” to review whether there is PO information at the header level if desired.
a. In this example, no PO was entered on the header.

9. Click the “Line-Info 1” tab to see information about the invoice lines.

a. You may wish to click “View All” if there are multiple invoice lines.
b. You may also navigate between lines by clicking the arrow symbols in the upper right-hand corner of the Bill Line box.

c. Use the Navigation drop-down to locate additional line information not displayed on this page, including the below:

   i. **Line Info 2** – where to enter or edit PO/PO lines on the bill lines
   ii. **Acctg-Rev Distribution** – where to enter or edit revenue accounting information
   iii. **Address Info** – where to enter or edit address and contact information
   iv. **Line Note** – where to enter or edit line notes
   v. **Header Note** – where to enter or edit header notes
# Where to Edit What? A Cheat Sheet

<table>
<thead>
<tr>
<th>Where to Navigate</th>
<th>What to Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header – Info 1</td>
<td>• Bill Status (NEW, RDY, QUO, HLD, etc.)</td>
</tr>
<tr>
<td></td>
<td>• Customer ID</td>
</tr>
<tr>
<td></td>
<td>• From-Date/To-Date of the invoice</td>
</tr>
<tr>
<td>Header – Misc Info</td>
<td>• Add/Edit the PO number (if editing a bill, the PO number must also be edited on Line – Info 2)</td>
</tr>
<tr>
<td>Line – Info 1</td>
<td>• Add/Delete lines for goods and services charged</td>
</tr>
<tr>
<td></td>
<td>• Edit quantity and price</td>
</tr>
<tr>
<td></td>
<td>• Edit description of good/service (30 character limit)</td>
</tr>
<tr>
<td></td>
<td>• Select/Edit products (if applicable)</td>
</tr>
<tr>
<td>Line – Info 2</td>
<td>• Add/Edit the PO number (if editing a bill, the PO number must also be edited on Header – Misc Info)</td>
</tr>
<tr>
<td></td>
<td>• Add/Edit the PO Line number</td>
</tr>
<tr>
<td>Acctg – Rev Distribution</td>
<td>• Enter or edit revenue accounting information</td>
</tr>
<tr>
<td>Header – Note</td>
<td>• Enter or edit header note</td>
</tr>
<tr>
<td>Line – Note</td>
<td>• Enter or edit line note</td>
</tr>
<tr>
<td>Address Info</td>
<td>• Enter or edit address and contact information</td>
</tr>
</tbody>
</table>

## View an Invoiced Bill

1. Navigate to View an Invoice in the Auxiliary Billing Tile:
2. Search for your desired bill(s)/invoice
   a. Business Unit: AUX01
   b. Search by invoice ID, bill status, customer, and/or contract.

3. Select “Search.”

4. Select the desired invoice.

5. You will be brought to the billing header page.
6. To print the invoice, select the “View Invoice Image” link on the right-hand side of the screen (ensure your pop-up blocker is disabled). A new window will open with your invoice pdf.

END