

OMNI AR/Billing: Using Line and Header Note Functionality for Additional Detail

Detailed Business Process Guide – ABILL10

Overview

Use line notes to add additional detail to a bill line. Use header notes to add additional detail to an entire bill. Line notes appear in the body of each line on the invoice. Header notes appear at the bottom of the bill, after all line detail.

Multiple header notes and line notes can be used.

If you feel you will be re-using the same language repeatedly, contact Auxiliary Accounting at ctl-auxiliaryaccounting@fsu.edu to request the language be added as a standard note. You can then select the standard note and avoid having to type the same language in each time you create an applicable bill.

Line Notes

Use line notes to add additional detail to a bill line. Line Notes will show up as indicated below:

Remit To:
 Florida State University
 Business Services
 Suite C-5500, University Center
 Tallahassee FL 32306-2533
 United States

Electronic/ACH Payments – Contact (850) 644-1824

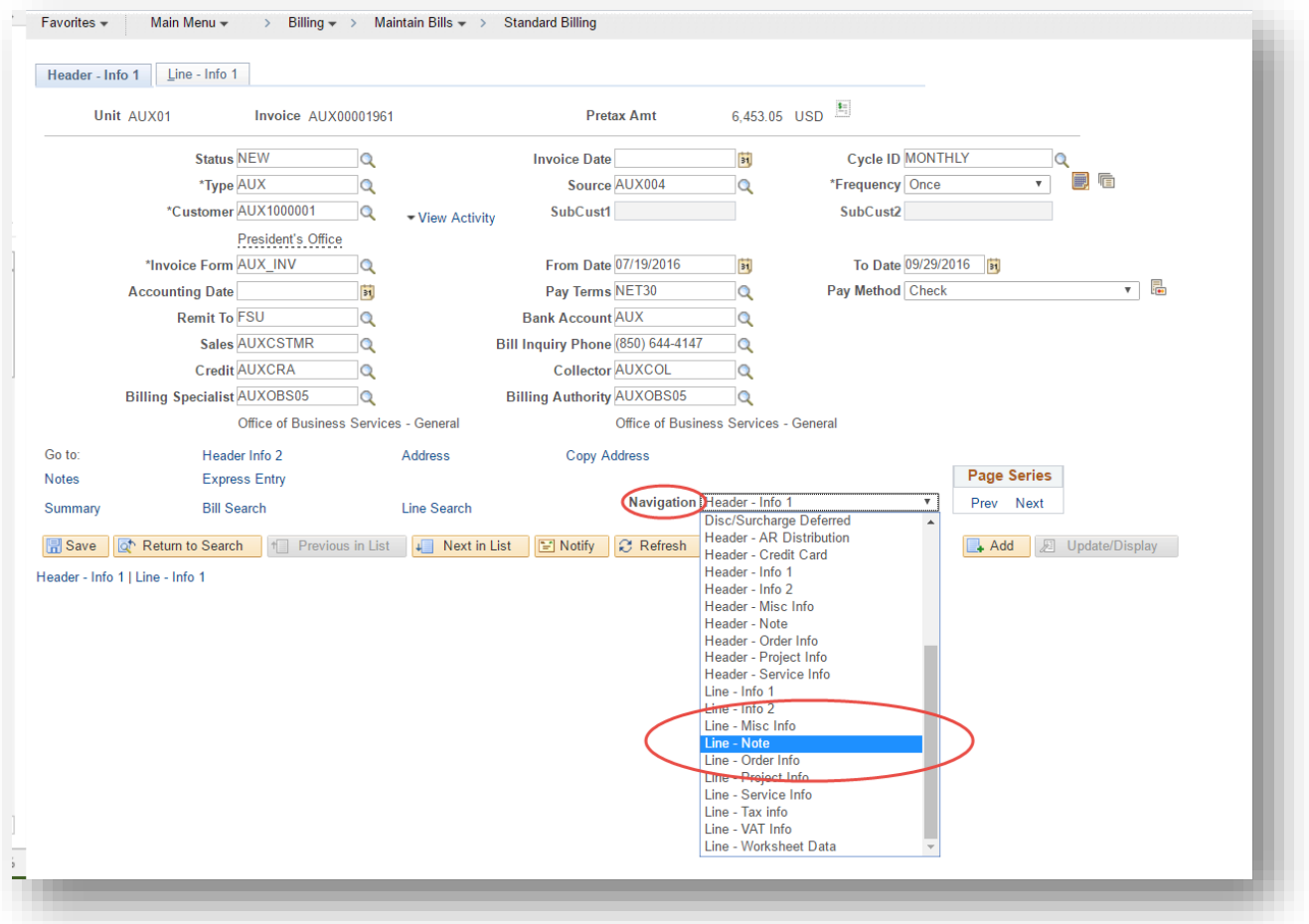
For billing questions, please call (850) 644-4147.
 OBS-Dining Services

Line	Product	Activity Date	Description	Quantity	UOM	Unit Amt	Net Amount
1		09/29/2016	FAMU Flex/Rattler Bucks	1934.3000	EA	1.0000	1,934.30
	FAMU Flex/Rattler Bucks 7/19/2016 to 9/29/2016						
2		09/29/2016	FAMU meal swipes	723.0000	EA	6.2500	4,518.75
	FAMU Meal Swipes 7/19/2016 to 9/29/2016						
Subtotal:							6,453.05
Amount Due:							6,453.05

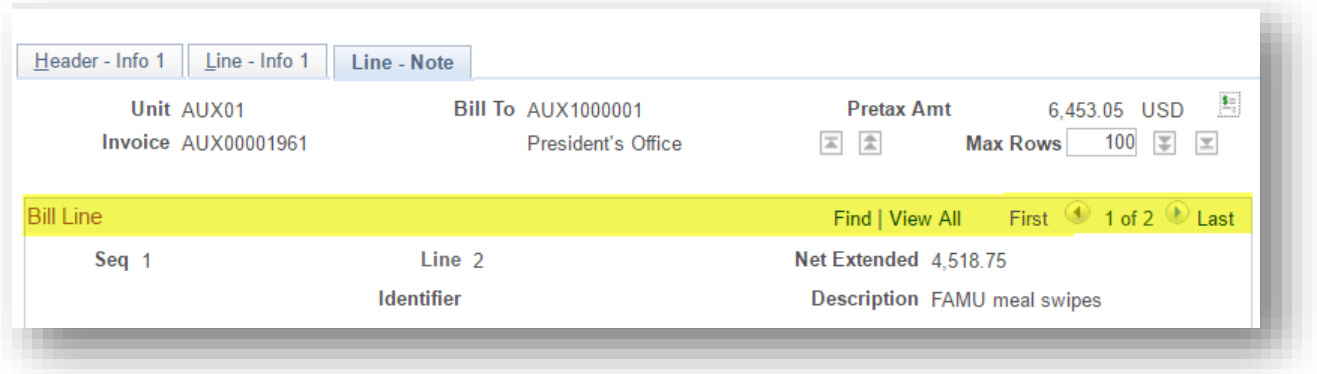
Includes charges from 7/19/2016 through 9/29/2016.

To create line notes, follow these steps:

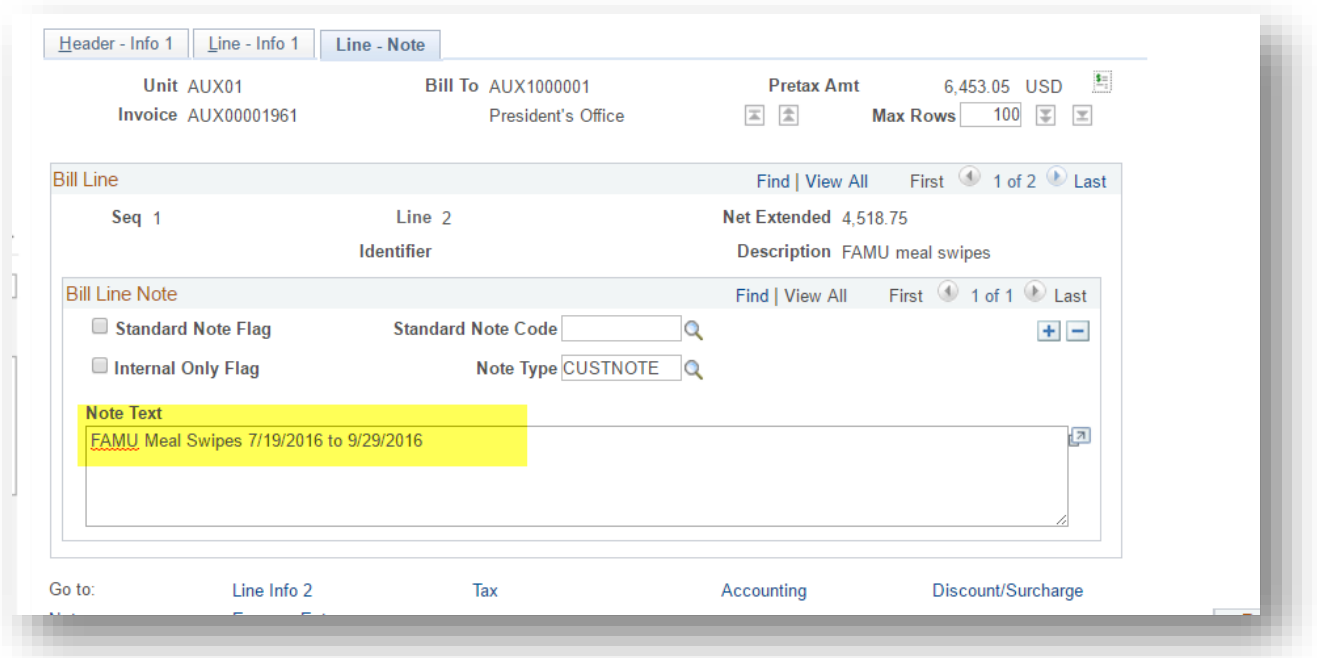
- 1) Create your bill as usual using the Standard Billing page. For more information, see
- 2) When ready to add line notes, select the option for "Line-Note" in the Navigation drop down box:



- 3) You will be brought to the Line Notes page. Select the line(s) for which you want the note to be applied by using the navigation page in the “Bill Line” box. For example, here we are adding a note to Line 1 of 2.



- 4) Type the text you’d like to include on the line in the “Note Text” box:
- a. *Note: If this exact text will be reused frequently, contact ctl-auxiliaryaccounting@fsu.edu; we can add the text as a standard option for you to select from rather than you having to type it in each time.*



- 5) If you’d like to add an additional note for this line, you may do so by hitting the plus icon in the Bill Line Note box:

Bill Line Note Find | View All First 1 of 1 Last

Standard Note Flag Standard Note Code

Internal Only Flag Note Type

Note Text

FAMU Meal Swipes 7/19/2016 to 9/29/2016

- 6) To add a note to an additional line, navigate to the line by using the arrow buttons in the Bill Line box and repeat the steps indicated above.
- 7) When ready, Save your bill by clicking the "Save" button.

Header - Info 1 | Line - Info 1 | **Line - Note**

Unit AUX01 Bill To AUX1000001 Pretax Amt 6,453.05 USD
 Invoice AUX00001961 President's Office Max Rows 100

Bill Line Find | View All First 2 of 2 Last

Seq 2 Line 1 Net Extended 1,934.30
 Identifier Description FAMU Flex/Rattler Bucks

Bill Line Note Find | View All First 1 of 1 Last

Standard Note Flag Standard Note Code

Internal Only Flag Note Type

Note Text

FAMU Flex/Rattler Bucks 7/19/2016 to 9/29/2016

Go to: Line Info 2 Tax Accounting Discount/Surcharge
 Notes Express Entry
 Summary Bill Search Line Search Navigation Line - Note Page Series
 Prev Next

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Header - Info 1 | Line - Info 1 | Line - Note

- 8) Follow the instructions in business process guide ABILL2 to understand how to begin, complete, and invoice your customer.

Header Notes

Perform the same steps as above, but navigate to the “Header-Note” area using the navigation drop down.

These notes appear at the bottom of the invoice and refer to the entire invoice.