

OMNI AR/Billing: Attach Supporting Documentation to a Bill

Detailed Business Process Guides – ABILL12

You can attach documents to a bill to provide supporting information. For FSU's implementation of OMNI AR/Billings, **this is for internal use only**; attachments will not be presented with printed invoices and cannot be viewed by external customers. Any internal user can view the information. Billing specialists can also view attached documents using the Supporting Documentation component under the Maintain Bills and Review Billing Information sections.

Main Menu > Billing > Maintain Bills > Supporting Documentation

The screenshot shows the 'myFSU OMNI Financials' interface with the 'SQNAFI' title. The breadcrumb trail is 'Main Menu > Billing > Maintain Bills > Supporting Documentation'. The page title is 'Supporting Documentation'. Below the title is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a 'Find an Existing Value' button. A 'Search Criteria' section contains several search fields: 'Business Unit' (set to '= AUX01'), 'Invoice' (set to 'begins with NEXT'), 'Bill Status' (set to '='), 'Customer' (set to 'begins with'), 'Contract' (set to 'begins with'), and 'Template Invoice Flag' (set to '='). There is also a 'Case Sensitive' checkbox. At the bottom are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

1. Look up a Bill
 - a. Searching for a Bill
 - i. Business Unit: AUX01
 - ii. You can use any of the optional criteria to narrow down your search
 - iii. ****TIP****: Use the Bill Status criteria to locate bills by status if you do not have the Invoice Number on hand.
 - b. If you are creating a new bill, please refer to **BGP ABILL2** for instructions
 - c. If you are creating a new quote, please refer to **BGP ABILL4** for instructions
2. Select the bill.
3. Choose whether this supporting documentation is at the header level (applies to the entire bill) or at the line level (just applies to one line of a multi-line invoice). Choose the appropriate tab:

Business Unit AUX01 Invoice AUX00001251

Invoice Documents Personalize | Find | 1 of 1

Documents | Additional Info

Document Description	Attached File	Internal Only	Upload	View
		<input checked="" type="checkbox"/>	Upload	View

4. Click the "Upload" Button:

Header Documentation | Line Documentation

Business Unit AUX01 Invoice AUX00001251

Invoice Documents Personalize | Find | 1 of 1

Documents | Additional Info

Document Description	Attached File	Internal Only	Upload	View
		<input checked="" type="checkbox"/>	Upload	View

5. A "File Attachment" window will open. Follow the prompts to browse for the desired file. When ready, select "Upload."
6. When the file has successfully been uploaded, the attachment name will appear in the "Attached File" column. Enter a document description in the Document Description field as desired.

Header Documentation | Line Documentation

Business Unit AUX01 Invoice AUX00001251

Invoice Documents Personalize | Find | 1 of 1

Documents | Additional Info

Document Description	Attached File	Internal Only	Upload	View
	Accounting_Basics.PNG	<input checked="" type="checkbox"/>	Upload	View

Save | Return to Search | Previous in List | Next in List | Notify

Header Documentation | Line Documentation

7. Select "Save."
8. Click the "View" button to view the file. It will open in a new window, so ensure your browser's pop-up blocker is disabled.

Favorites ▾ Main Menu ▾ > Billing ▾ > Maintain Bills ▾ > Supporting Documentation

Header Documentation Line Documentation

Business Unit AUX01 Invoice AUX00001251

Invoice Documents Personalize | Find | 1 of 1

Documents Additional Info

Document Description	Attached File	Internal Only	Upload	View		
Test Document	Accounting_Basics.PNG	<input checked="" type="checkbox"/>	Upload	View	+	-

End
