

Accounts Receivable: Tips to Searching for Invoices and Receipts in Ignite

Overview

- This job aid provides tips to using the search functionality in Ignite, specific to the Accounts Receivable Specialist, which includes creating custom searches and searching for items entered by a specific person.

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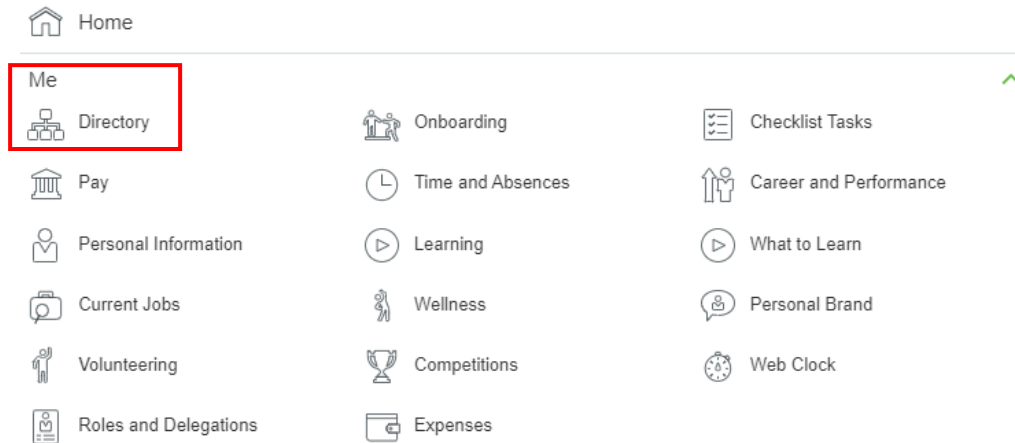
To enhance the search process, consider sorting by the person creating the invoice or receipt. To do this, it is necessary to know their **Person Number** in Ignite.

I. Navigating to the Directory

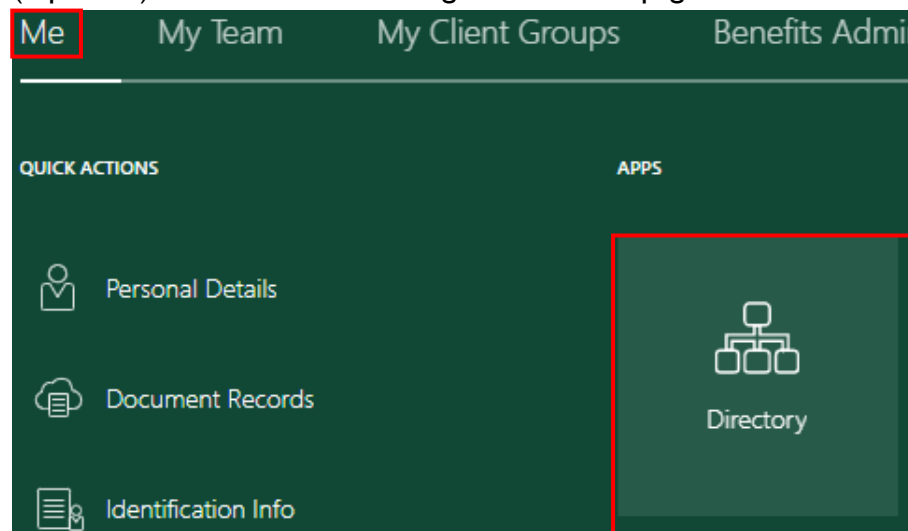
- I. You can access the **Directory** section in two ways:
 - a. (Option 1) Click the **Navigator icon** in upper left-hand corner of the Ignite landing page.



- b. Under the **Me** section, click the drop-down arrow, and select **Directory**.



- c. (Option 2) Under the **Me** heading on the home page, select the **Directory** tile.



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2. Searching for Employee Number

1. Enter the employee name in the search bar and click enter on your keyboard. The person's information will appear. Make note of the **Person Number**.

The screenshot shows a search bar with the text 'lannuccilli' entered. Below the search bar, the search results are displayed in a table format. The table has columns for Name, Email, and Person Number. The search results show the following information:

Name	Email	Person Number
Mr. Anthony Jay lannuccilli	Tony_J_lannuccilli@baylor.hcm	3555190

3. How to setup a Custom Search for Invoices created by a specific user

1. From the **Accounts Receivable** module, select **Billing**. Then, click on the task icon on the right side of the screen and select **Manage Transactions**.

The screenshot shows the 'Transactions' menu in the Ignite Billing module. The menu items are:

- Create Transaction
- Credit Transaction
- **Manage Transactions**
- Manage AutoInvoice Lines
- Approve Adjustments
- Manage Recurring Bill Plans

2. In the Search section, click on **Advanced** before entering any criteria in the fields.

The screenshot shows the Search section in the Ignite interface. The search options are:

- Business Unit
- Transaction Source
- Transaction Class
- Transaction Type
- Transaction Number (Starts with)
- Transaction Date (Equals, m/d/yy)
- Bill-to Customer (Equals)
- Reference

The 'Advanced' search option is selected. The search results are displayed in a table format. The search results show the following information:

Business Unit	Transaction Source	Transaction Class	Transaction Type	Transaction Number	Transaction Date	Bill-to Customer	Reference
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3. Click on **Add Fields** at the bottom of the page, and then **Created By**.

Search

Business Unit [dropdown]

** Transaction Source [dropdown]

Transaction Class [dropdown]

Include Credited Invoices

Transaction Type [dropdown]

** Transaction Number Starts with [input]

Original Transaction Number Starts with [input]

Balance Forward Billing Number Starts with [input]

** Transaction Date Equals [input] m/d/yy

Due Date Equals [input] m/d/yy

** Accounting Date Equals [input] m/d/yy

Bill Plan Name Starts with [input]

Currency [dropdown]

** Bill-to Customer Equals [input]

** Bill-to Customer Account Number Equals [input]

Bill-to Customer Site [dropdown]

** Ship-to Customer [input]

Ship-to Site [dropdown]

Batch Name [dropdown]

Primary Salesperson Equals [input]

PO Number Starts with [input]

Document Number Equals [input]

Complete [dropdown]

Reference [input]

Intercompany [dropdown]

XML Delivery Status [dropdown]

Delivery Method [dropdown]

Fiscal Document Access Key Starts with [input]

Fiscal Document Status Equals [input]

Print Status [dropdown]

Context Value [dropdown]

Context Value [dropdown]

Search Reset Save... **Add Fields** Reorder

Basic Saved Search All Transactions

** At least one is required

4. Enter the following in the Search criteria:

- Transaction Source** – select **Manual**
- Created By** – enter the **Person Number** retrieved from the directory.
 - Click on **Save** at the bottom of the screen.
 - Give the search setting a **name**.
 - Click **OK**.

Create Saved Search X

* Name

Invoices by Tony I.

Set as Default

Run Automatically

OK Cancel

iv. Notice the Search Name is now listed in the top right corner of the field.

Basic **Saved Search** Invoices by Tony I. ▼

v. Click **Search** at the bottom of the screen.

Search Reset Save... Add Fields ▼ Reorder

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- c. All invoices created by the person selected will now be shown in the results.

Manage Transactions Done

Search Basic Saved Search Invoices by Tony I. ▼

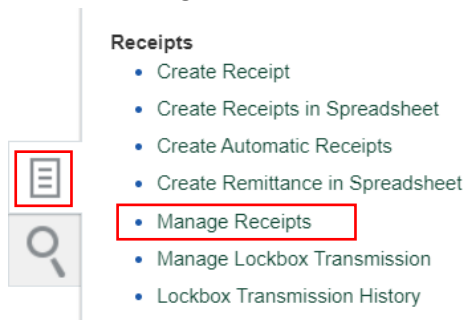
Actions View Detach

Transaction Number	Transaction Source	Transaction Class	Transaction Type	Complete	Bill-to Customer	Entered Amount	Transaction Date	Business Unit	Original Transaction Number
▶ 15002	Manual	Invoice	Invoice	Yes	AF Test	1,000.00 USD	3/31/20	BAYLOR	
▶ 16010	Manual	Invoice	Invoice	Yes	TI Test	200.00 USD	4/14/20	BAYLOR	
▶ 16009	Manual	Invoice	Invoice	Yes	TI Test	85.00 USD	4/14/20	BAYLOR	
▶ 13002	Manual	Invoice	Invoice	Yes	AF Test	199.00 USD	3/10/20	BAYLOR	
▶ 16011	Manual	Invoice	Invoice	Yes	TI Test	1,300.00 USD	4/14/20	BAYLOR	
▶ 17003	Manual	Invoice	Invoice	Yes	TI Test	2,000.00 USD	4/14/20	BAYLOR	
▶ 17007	Manual	Invoice	Invoice	No	Baylor Scott & White-2	6,585.00 USD	4/15/20	BAYLOR	

- d. Click on the transaction number to access the invoice and begin the review and approval process.

4. How to setup a Custom Search for Receipts created by a specific user.

1. From the **Receivables** module, select **Accounts Receivable**. Then, click the task icon on the right side of the screen and select **Manage Receipts**.



2. In the Search section, click on **Advanced** before entering any criteria in the fields.

Manage Receipts Done

Search Advanced Saved Search All Receipts ▼

** At least one is required

Business Unit	<input type="text"/>	** Batch Number	<input type="text"/>
** Receipt Number	Starts with <input type="text"/>	** Receipt Method	<input type="text"/>
** Customer Name	<input type="text"/>	Status	Equals <input type="text"/>
** Customer Account Number	<input type="text"/>	Remittance Bank	<input type="text"/>
** Receipt Date	Equals <input type="text"/>	State	Equals <input type="text"/>

Search Reset Save...

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3. Click on **Add Fields** at the bottom of the page, and then **Created By**.

Manage Receipts Done

Search Basic Saved Search All Receipts ** At least one is required

Business Unit ▼

** Receipt Number Starts with ▼

** Customer Name 🔍

** Customer Account Number 🔍

** Receipt Date Equals ▼ mm/dd/yyyy 📅

** Batch Number ▼

** Receipt Method ▼

Status Equals ▼

Remittance Bank ▼

State Equals ▼

Currency Equals ▼

Entered Amount Equals ▼

Receivables Specialist ▼

Receipt Type Equals ▼

Document Number Equals ▼

** Customer Site ▼

Maturity Date Equals ▼ mm/dd/yyyy 📅

** Deposit Date Equals ▼ mm/dd/yyyy 📅

Remittance Bank Branch ▼

** Remittance Bank Account ▼

Remittance Batch ▼

Remittance Method Equals ▼

Receivables Activity ▼

Accounting Date Equals ▼ mm/dd/yyyy 📅

Context Value Equals ▼

Search Reset Save... Add Fields Reorder

4. Enter the following in the Search criteria:
 - a. **Receipt Method** – select **Misc. Receipts for a specific area**.
 - b. **Created By** – enter the **Person Number** retrieved from the directory.
 - i. Click on **Save** at the bottom of the screen.
 - ii. Give the search setting a **name**.
 - iii. Click **OK**.

Create Saved Search ×

* Name

Bobbie's Receipts

Set as Default

Run Automatically

OK Cancel

- iv. Notice the Search Name is now listed in the top right corner of the field.

Basic Saved Search Bobbie's Receipts ▼

- v. Click **Search** at the bottom of the screen.

Search Reset Save... Add Fields ▼ Reorder