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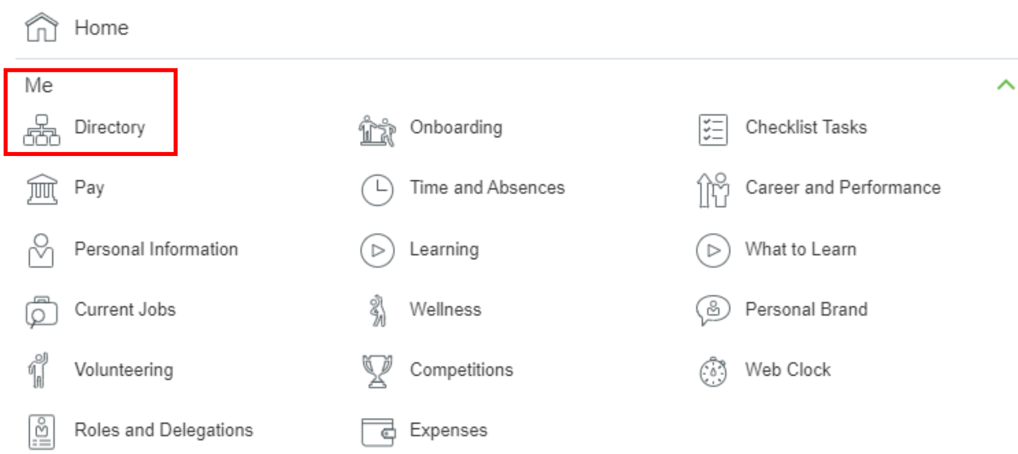
*To enhance the search process, consider sorting by the person creating the invoice or receipt. To do this, it is necessary to know their **Person Number** in Ignite.*

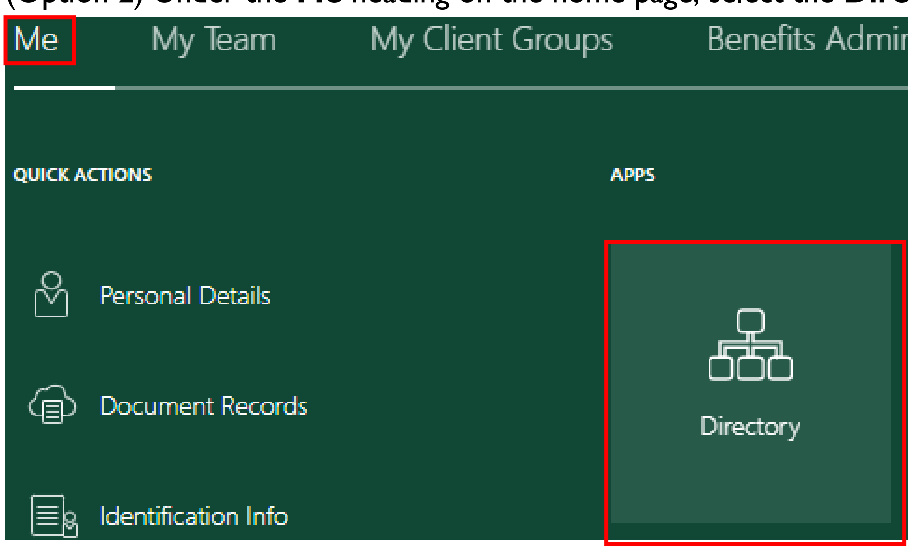
1. Navigating to the Directory

1. 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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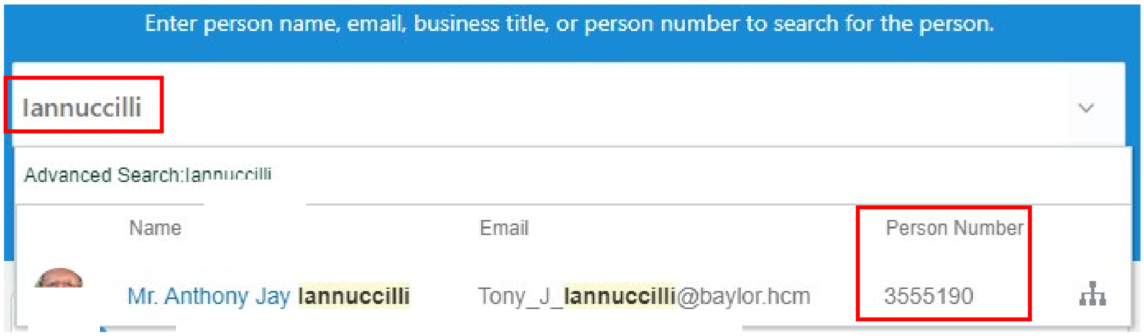
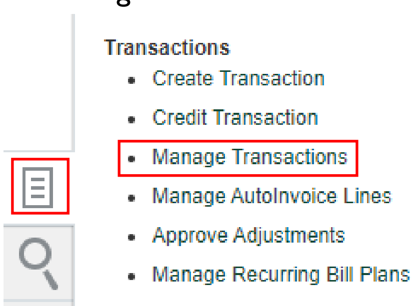
2. Searching for Employee Number

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**.

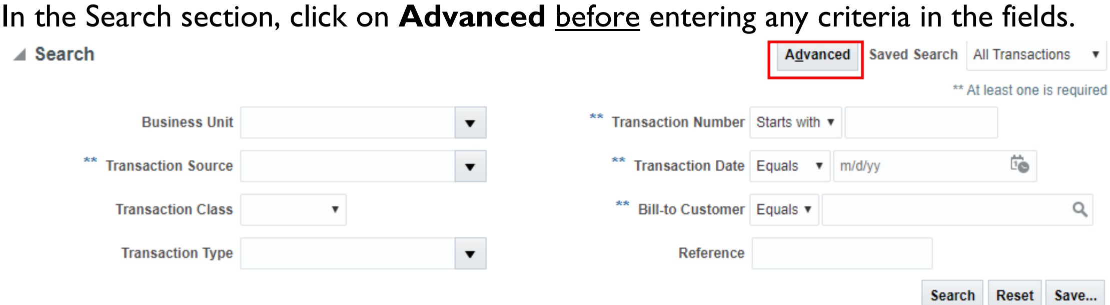


3. How to setup a Custom Search for <u>Invoices</u> created by a specific user

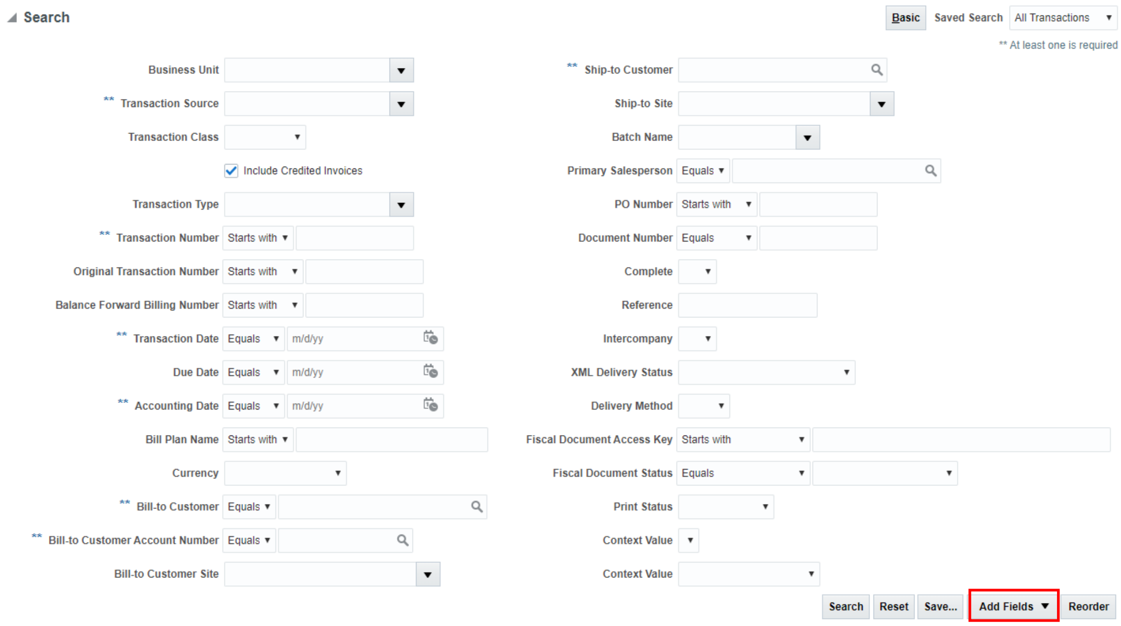
1. From the **Accounts Receivable** module, select **Billing**. Then, click on the task icon on the right side of the screen and select **Manage Transactions**.



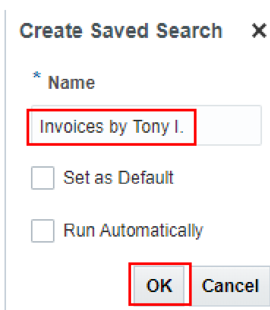
2. In the Search section, click on **Advanced** <u>before</u> entering any criteria in the fields.



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

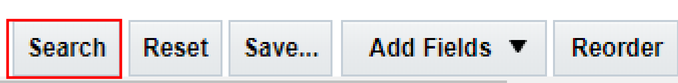


4. Enter the following in the Search criteria:
   a. **Transaction Source** – select **Manual**
   b. **Created By** – enter the **Person Number** retrieved from the directory.
      i. Click on **Save** at the bottom of the screen.
      ii. Give the search setting a **name**.
      iii. Click **OK**.

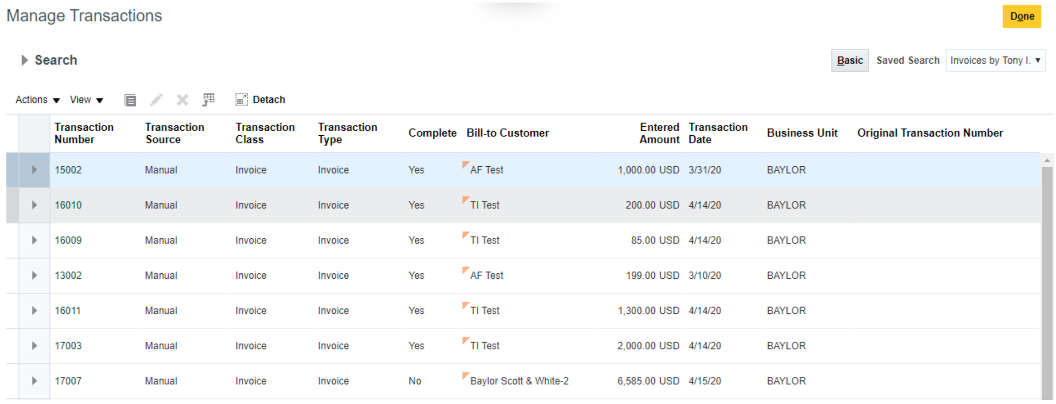


      iv. Notice the Search Name is now listed in the top right corner of the field.

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



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

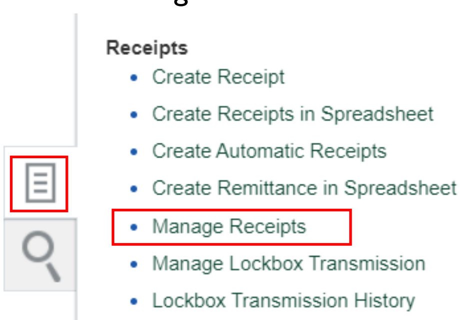


Transaction Number	Transaction Source	Transaction Class	Transaction Type	Complete	Bill-to Customer	Entered Amount	Transaction Date	Business Unit	Original Transaction Number
15002	Manual	Invoice	Invoice	Yes	AF Test	1,000.00 USD	3/31/20	BAYLOR	
16010	Manual	Invoice	Invoice	Yes	TI Test	200.00 USD	4/14/20	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	

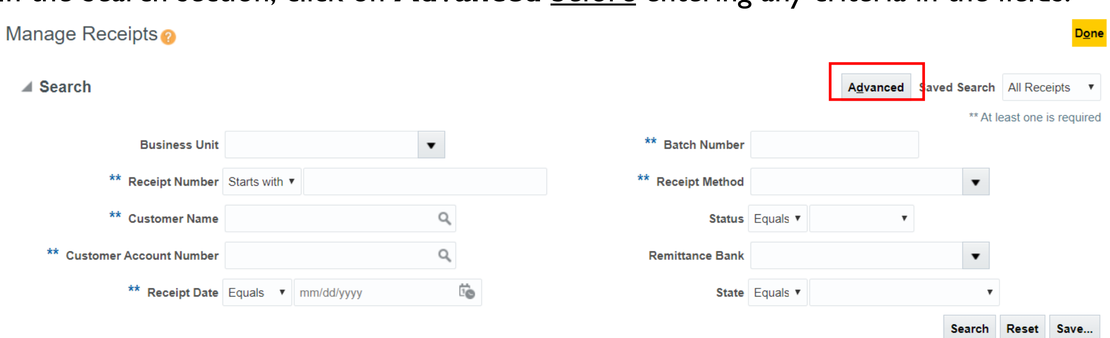
d. Click on the transaction number to access the invoice and begin the review and approval process.

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.



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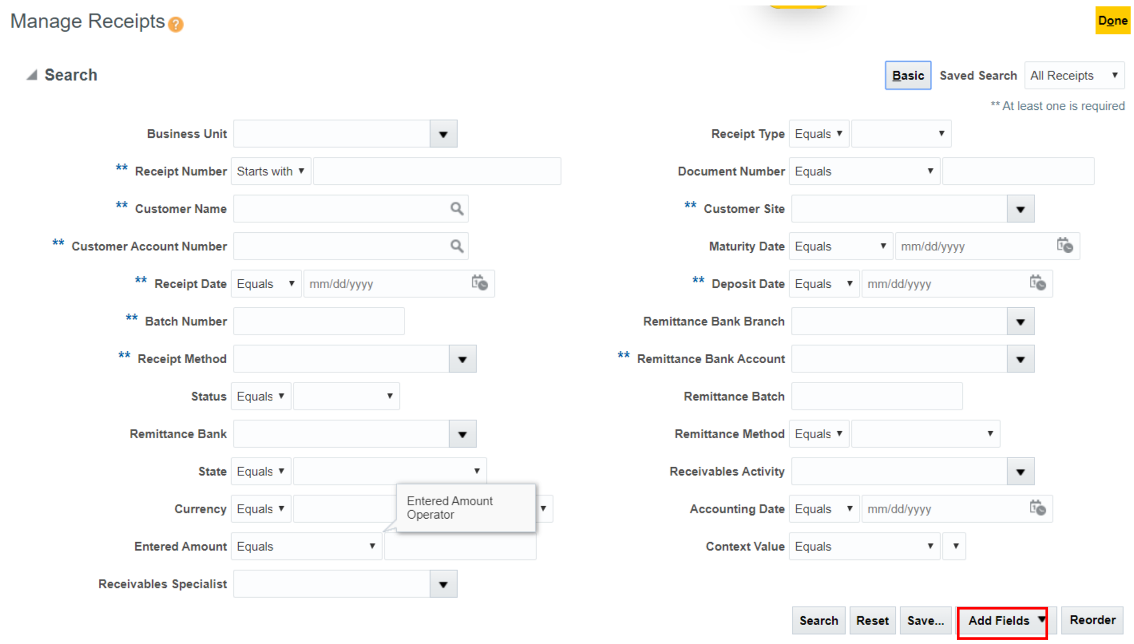
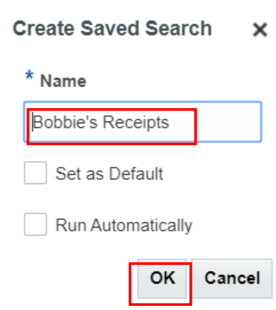
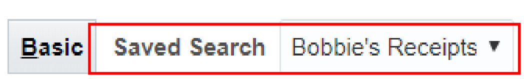
3. Click on **Add Fields** at the bottom of the page, and then **Created By**.



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**.



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



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