



## **Finance Transformer**

### **Order to Cash**

#### **Viewing Sales Invoice Image**

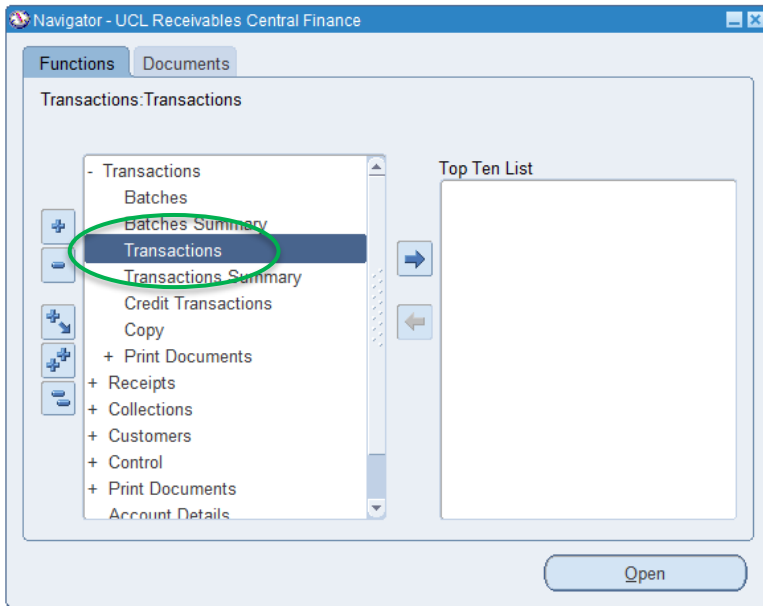
## Introduction

Following user feedback, new functionality has been introduced to MyFinance from 27 March 2020 that enables a user with the appropriate system responsibility to view a sales invoice directly through the Accounts Receivable (AR) Transaction menu. This replaces the previous multi-step and multi-table process.

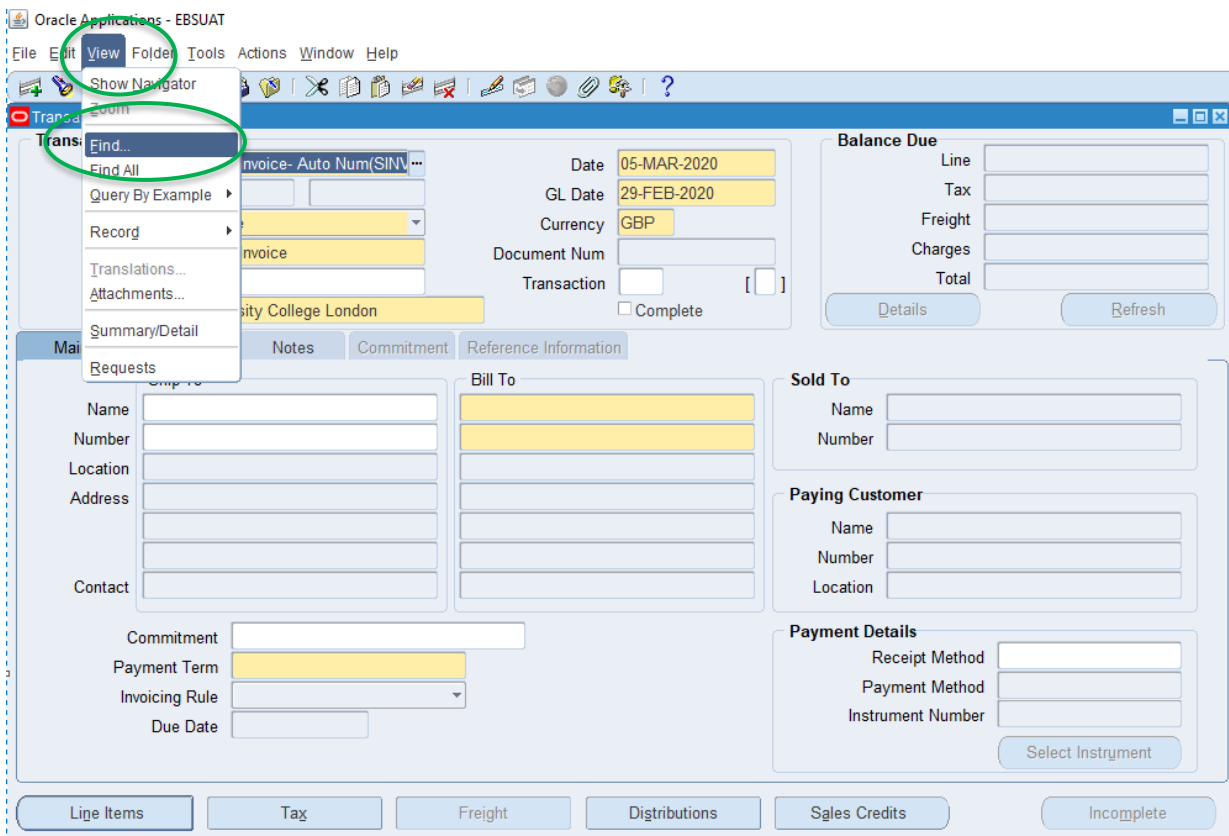
This guide explains how to view these images. It assumes you have AR Entry responsibility within MyFinance (if you do not have this responsibility in your MyFinance menu, please liaise with your Departmental Administrator who can request you are given access if appropriate).

## Viewing Sales Invoices

1. Go to your UCL AR Entry responsibility in MyFinance and select **Transactions**:



2. The window below will appear. Select **View, Find**:



- Enter the Sales Invoice number or other criteria, i.e. Customer Name and sales person etc. (If sales invoice number is not available, please enter more than one criteria otherwise results will take a long time to appear and may not be relevant). Click **Find**:

The screenshot shows the 'Find Transactions' window with the following fields and options:

- Transaction Numbers: 1150111
- Sales Order Number: (empty)
- Ship To: (highlighted box)
  - Name: (empty)
  - Number: (empty)
  - Taxpayer ID: (empty)
- Bill To: (highlighted box)
  - Name: (empty)
  - Number: (empty)
  - Taxpayer ID: (empty)
- PO Numbers: (empty)
- Document Number: (empty)
- Reference Numbers: (empty)
- Transaction Dates: (empty)
- GL Dates: (empty)
- Batches: (empty)
- Sources: (empty)
- Transaction Types: (empty)
- Class: (dropdown menu)
- Complete: (dropdown menu)
- Primary Salesperson: (empty)
- Credited Transaction: (empty)
- Period: (empty)
- Currency: (empty)
- Buttons: Clear, New, Find (highlighted)

- Select **Tools, View Invoice PDF**:

The screenshot shows the Oracle Applications interface with the 'Tools' menu open. The 'View Invoice PDF' option is highlighted with a green circle. The background shows a transaction summary for 'UNIVERSITY HOSPITALS BRISTOL NHS' with a date of 21-JUN-2019.

The 'Tools' menu options are:

- Exchange Rate
- Create Accounting
- View Accounting
- Distributions
- Balances
- Freight
- Show Closed Invoices
- Line Items
- Overview
- Sales Credits
- Tax
- About AR
- View Invoice PDF (highlighted)

The transaction summary shows:

- Date: 21-JUN-2019
- GL Date: 21-JUN-2019
- Currency: GBP
- Document Num: (empty)
- Transaction: (empty)
- Complete:
- Balance Due: 0.00
- Sold To: UNIVERSITY HOSPITALS BRISTOL NHS, NHS000211, BRISTOL ROYAL
- Paying Customer: UNIVERSITY HOSPITALS BRISTOL NHS, NHS000211, BRISTOL ROYAL
- Payment Details: Receipt Method, Payment Method, Instrument Number

5. The Sales Invoice will appear on your internet browser:

The screenshot shows a web browser window with the URL [https://ebSCOREPP-uat.adcom.ucl.ac.uk:4446/OA\\_HTML/RF.jsp?function\\_id=14736&resp\\_id=50700&resp\\_appl\\_id=222&security\\_group\\_id=08&lang\\_code=US&params=v869NpAmDyT667g6VCKSaksiat6t-gCD7vyn7bjpKUI2C](https://ebSCOREPP-uat.adcom.ucl.ac.uk:4446/OA_HTML/RF.jsp?function_id=14736&resp_id=50700&resp_appl_id=222&security_group_id=08&lang_code=US&params=v869NpAmDyT667g6VCKSaksiat6t-gCD7vyn7bjpKUI2C). The page content includes:

**SALES INVOICE**  
V.A.T. Registration Number  
GB 524 3711 68

University College London  
Gower Street  
LONDON WC1E 6BT  
Telephone: +44 02076792000

**UCL**

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For the Attention of:  
UNIVERSITY HOSPITALS BRISTOL NHS

Invoice No: 1150111  
Invoice Date: 21-Jun-2019

6. From the browser, the document can be emailed, by selecting **File, Send, Page by email**:

The screenshot shows the same web browser window as above. The 'File' menu is open, and the 'Send' option is selected, which has opened a sub-menu. In the sub-menu, 'Page by email...' is highlighted. Other options in the sub-menu include 'Link by email...' and 'Shortcut to Desktop'. The background content of the invoice is partially visible through the menu.

7. From the browser, the invoice can also be saved as a document, by selecting, **File, Save as**:

The screenshot shows the same web browser window as above. The 'File' menu is open, and the 'Save as...' option is highlighted. The background content of the invoice is partially visible through the menu.

8. From the browser, the invoice can also be printed, by selecting, **File, Print:**

