

Search for Invoices and AR Items

Search for Invoices

1. Navigate to Billing > Review Billing Information > Details
2. Enter Invoice Number
 - Click Search

Search for Accounts Receivable Items by Customer

1. Navigate to Accounts Receivable > Customer Accounts > Item Information > Item List
2. Enter Customer Number
3. Select Status (All, Open or Closed)
 - Click Search to display items

Search for Accounts Receivable Items by Bill Source

1. Navigate to Accounts Receivable > Customer Accounts > Item Information > Item List
2. Click on Advanced Search Link
 - In the Item ID Field Select “Like” from the drop down
 - Enter Bill Source value in the Item ID field followed by %. (e.g. 026%)
3. Select Status (All, Open or Closed)
 - Click Search to display items for the entered Bill Source

The screenshot shows the 'Advanced Search' interface. At the top, there are tabs for 'Item List' and 'Advanced Search'. Below the tabs, there are search criteria: SetID: UMFIN, Unit: UMN01, Customer: (empty), and *Level: N. There is a *Status dropdown menu set to 'Open' and a Search Preferences field. Below these are buttons for Search, Cancel, Clear, Save, and Delete. The interface is divided into two main sections: 'Item Responsible Parties' and 'Reference Data'. The 'Item Responsible Parties' section includes fields for AR Specialist, Credit Analyst, Broker ID, Collector, and Sales Person, each with a dropdown menu set to 'Equal' and a search input field. The 'Reference Data' section includes fields for Item ID, Entry Type, Entry Reason, and Invoice, each with a dropdown menu set to 'Equal' and a search input field. The Item ID field is set to 'Like' and contains the text '018%'.