

Adding an attachment to an AR invoice

ResponsibilityAR User, AR Supervisor, AR ManagerNavigateTransactions

Adding an attachment

Find the invoice you wish to add an attachment to.

🛃 Oracle Applications - UFSPLAY - Last Refreshed 13/04/2018								
Eile Edit View Folder	Tools Reports Actions <u>W</u> indow	Help						
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🗖 Transactions (Cambridge University : GBP)								
Transaction				Balance Due				
Source	Manual Invoice	Date	21-JUN-2018	Line				
Number	1003172	GL Date	21-JUN-2018	Tax				
Class	Invoice -	Currency	GBP	Freight				
Туре	PD Invoice	Document Num		Charges				
Reference		Transaction		Total				
Legal Entity	Cambridge University		Complete	(<u>D</u> etails	Refresh			
Main Mo	Main More Notes Commitment Reference Information							
Ship To Bill To Sold To								

Select the **paperclip** icon at the top of the screen and the **Attachments** window will open.

🗢 Attachme	ents - Manual Invoice, 1003172	,				_ 🗆	×
Main	Source						
Seq	Category	Title	Description	Data Type	May Be Changed		
10					✓	^	
						3	
						5	
Entit	y Name: RA_CUSTOMER_T	RX					
						-	
		_				_	
🗆 Include	Related Documents		Publish to Catalog	Docum	ent Catalog		
		_					

In the *Category* field select **Miscellaneous** and enter a *Title* and *Description* for the attachment.

It is important to include your two digit department code. This will also be used to find it later if you save it to the Document Catalog.



Select a relevant *Data type* by clicking into

the box and clicking on the **list of values** button which appears on the right. This will allow you to do the following:

- File upload a file
- Long Text –text up to a maximum of 32,767 characters
- Short Text text up to a maximum of 4,000 character
- Webpage –enter a URL for a webpage

 Datatypes

 Find %

 Datatype

 File

 Long Text

 Short Text

 Web Page

 (I)

 Eind

 OK

 Qancel

Attaching a file

If you select **File** a webpage will open allowing you to upload the chosen file.

Select **Browse** and a window will open allowing you to select the file.

When you click **Submit** a message will appear confirming the file has been uploaded successfully.



Confirmation

- 1. File upload completed successfully.
- 2. * Please close the web browser.
- 3. * Return to the Attachments form and click the Yes button to indicate file upload is complete.

Re-open Oracle and select **Yes** to the message which has appeared.







Adding text

After selecting Long Text or Short Text the select the yellow text box below and enter the information you wish to attach.

Main	Source					
Seq	Category	Title	Description	Data Type	May Be Changed	_
10	Miscellaneous			Long Text	✓	
						-
Entit	v Name: RA CUSTON	MER TRX	л	л.		
	,					
						<u></u>
						-
						_
						V
Include	Related Documents		Publish to Cata	alog Do	cument Catalog	
	_					

Finally, select the yellow **Save** icon *the screen*.

Adding a URL

After selecting Web page the Source tab will automatically open. Enter the URL of the web page into the File or URL field

0	Attachme	nts - Manual Invoice, 10	03173,	
	Main	Source		
1	Seq	Category	File or URL	
	10	Miscellaneous		
	Ĩ			
l				

Select the yellow **Save** icon 4 at the top of the screen.



Viewing attachments

If an item has been attached to a record then the paperclip icon will change to show it holding a piece of paper⁽¹⁾. To see what this represents select the paperclip icon at the top of the screen.

The attachments screen will open.

ichmei	nts - Manual Invoice, 100317	2,				
lain	Source					
Seq	Category	Title	Description	Data Type	May Be Changed	
20	Miscellaneous	PD_Purchase Order12345	PD_Purchase order 123456 from	n File 🚥		
						-
Entity	/ Name: RA_CUSTOMER_	TRX		л	,	
		C				
			Open <u>D</u> ocument			

This window lists all of the documents linked to the invoice. If it relates to a file select the line and click on the **Open Document** button to open it.



Using the catalogue

The catalogue allows departments to upload their frequently used attachments so they can use them for future invoices without having to re-type/re-upload every time.

Note: all files uploaded to the catalogue can be accessed by any department using accounts receivable – please do not upload any sensitive or personal data.

Publishing to the catalog

Select the file or text in the attachments window. Then select Publish to Catalog

O Attac	hments -	Manual Invoice, 1003172,					
Ma	in So	urce					
S	Seq Cat	egory	Title	Description	Data Type	May Be Changed	
2	0 Mis	cellaneous	PD_Purchase Order12345	PD_Purchase order 123456 from	File 😶		
		and the second	(and a second	and a set of and		and the second	
					_		
	lude <u>R</u> ela	ited Documents		Publish to Catalog	Docum	ent Catalog	

A window will pop up asking if you wish to publish the document to the catalog. Select **OK**.



A confirmation message will let you know it has uploaded successfully.

Recalling an attachment from the catalogue

From the Attachments window select the Document Catalog... button

C	Atta	chmer	nts - Manual Invoice, 1003172	,				
	M	lain	Source					
		Seq	Category	Title	Description	Data Type	May Be Changed	ן ו
		20	Miscellaneous	PD_Purchase Order12345	PD_Purchase order 123456 fro	n File 🚥		
	LŌ		and the second the second					
	🗆 In	clude	Related Documents		Publish to Catalog	Docum	ent Catalog	



A search window will appear.

Using the fields in the search box you can narrow down the list of possible attachments. By entering **XX%** (where XX is your department code) you can narrow the list just to your department's attachments. When you select **Find** a list of possible items will appear.

Document Catalog						×
 Find Existing Document 	S					
Description PD%			Categor	у		
Data Type			Attached t	0		
File Name		Ŧ	Titl	e		
URL		L]	Clea	r i	Find)
Usage		-				
Documents						
Description		Category	Data Type	e Us	sage	
PDF quotation		Miscellaneous	File	St	andard	A
PD_Purchase order 1	123456 from I	Miscellaneous	File	St	Standard	
PD_Standard Supply	Form	Miscellaneous	File	St	Standard	
		E	Preview	<u>C</u> ancel	Atta	ich 1

Select the item you wish to attach and click **Attach 1**. The attachment has now been added to your invoice.