

# How to Delete an Attachment from an Existing Miscellaneous Invoice



Created: Delia Russell – September 2016

# There are two ways to Delete an Attachment from a Miscellaneous Invoice:

- Slides 3 – 5 will require clicking the SAVE icon

- Slides 6 – 9 will require clicking the UPDATE ATTACHMENTS icon

To begin the process of DELETING an attachment or several attachments to an Existing Miscellaneous Invoice, locate the Invoice on the Home Screen which is the *VIP Invoicing Screen* as seen below in the *Miscellaneous Claiming Accounts* section. **Note:** It is possible to see a Labor Claim section at the top of the screen if a Data Entry role user has access to both Labor and Miscellaneous Claims. Click the [Claim Detail link](#) left side of screen to continue.

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VIP INVOICING SCREEN - ACCOUNT/INVOICE NUMBER

Notice Help link that will provide step by step instructions for each VIP screen.


**Miscellaneous Claiming Accounts**

(Click on the Billing Account Number to enter a new invoice or click on the Claim Detail link to work with an existing invoice)

Billing Account	Account Owner	Account Description	PO Number	Invoice Number	Invoice Date	Description	Claim Status	End Billing Period
<a href="#">LMCB00157</a> <a href="#">Claim Detail</a>	UserMisc, EO	Misc Claimer and SIR	4100301229	VALID01	Aug 30, 2016	Charge number valid test	Working	Aug 1, 2016

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This is the lesson that requires the **SAVE icon** to be selected in the process. In the example below we will delete one attachment by clicking the **Delete button first** and no need to space out the Attachment Description. Next click the **SAVE icon**.



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### VIP MISCELLANEOUS CLAIMS SCREEN

UserMisc, EO - LMCB00157 - 4100301229 - Misc Claimer and SIR

Invoice Numbers: VALID01 - Charge number valid test

<b>NAME:</b>	UserMisc, EO	<b>ID:</b> EX_000180823	<b>ACCOUNT:</b>	LMCB00157	<b>STATUS:</b>	Working
<b>PO NUMBER:</b>	4100301229					
<b>INVOICE NUMBER:</b>	VALID01	<b>INVOICE DATE:</b>	<span style="border: 1px solid #ccc; padding: 2px;">Aug 30, 2016</span>	<b>END BILLING PERIOD:</b>	<span style="border: 1px solid #ccc; padding: 2px;">Aug 1, 2016</span>	
<b>DESCRIPTION:</b>	<span style="border: 1px solid #ccc; padding: 2px;">Charge number valid test</span>					

<p><b>Attachment 1:</b> <span style="border: 1px solid #ccc; padding: 2px;">calendar2015.pdf</span> <input type="radio"/> Delete</p> <p><b>Attachment 2:</b> <span style="border: 1px solid #ccc; padding: 2px;"> </span> <input type="button" value="Browse..."/></p> <p><b>Attachment 3:</b> <span style="border: 1px solid #ccc; padding: 2px;">calendar 12016.pdf</span> <input checked="" type="radio"/> Delete</p> <p><b>Attachment 4:</b> <span style="border: 1px solid #ccc; padding: 2px;"> </span> <input type="button" value="Browse..."/></p> <p><b>Attachment 5:</b> <span style="border: 1px solid #ccc; padding: 2px;"> </span> <input type="button" value="Browse..."/></p> <p style="text-align: center;"><input type="button" value="Update Attachments"/></p>	<p><b>Attachment 1 Description:</b> <span style="border: 1px solid #ccc; padding: 2px;">CALENDAR 2015</span></p> <p><b>Attachment 2 Description:</b> <span style="border: 1px solid #ccc; padding: 2px;"> </span></p> <p><b>Attachment 3 Description:</b> <span style="border: 1px solid #ccc; padding: 2px;">CALENDAR 2016</span></p> <p><b>Attachment 4 Description:</b> <span style="border: 1px solid #ccc; padding: 2px;"> </span></p> <p><b>Attachment 5 Description:</b> <span style="border: 1px solid #ccc; padding: 2px;"> </span></p>
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Detail Description	Charge Number	ITEM	Reg Hours	OT Hours	Amount	Supplier Name
<span style="border: 1px solid #ccc; padding: 2px;">valid test</span>	<span style="border: 1px solid #ccc; padding: 2px;">210062590200WBH76020000</span>	<span style="border: 1px solid #ccc; padding: 2px;">0002</span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;">33.33</span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span> 
<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span> 
<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span> 
<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span> 
<input type="button" value="Add Row"/>		<b>Totals:</b> 0.0 0.0 \$33.33				

Notice the successful message below and the Attachment is deleted along with the Attachment Description. Notice the claim is now in the *Working* status and is ready to be submitted. Click the **SUBMIT FOR APPROVAL** icon. **This completes this lesson of How to Delete an Attachment utilizing the SAVE icon.**

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### VIP MISCELLANEOUS CLAIMS SCREEN

*Record(s) have been successfully inserted / updated.* ←

UserMisc, EO - LMCB00157 - 4100301229 - Misc Claimer and SIR

Invoice Numbers: VALID01 - Charge number valid test

**NAME:** UserMisc, EO    **ID:** EX\_000180823    **ACCOUNT:** LMCB00157    **STATUS:** Working

**PO NUMBER:** 4100301229

**INVOICE NUMBER:** VALID01    **INVOICE DATE:** Aug 30, 2016    **END BILLING PERIOD:** Aug 1, 2016

**DESCRIPTION:** Charge number valid test

Attachment 1: [calendar2015.pdf](#)  Delete

Attachment 2:  Browse...

Attachment 3:  Browse...

Attachment 4:  Browse...

Attachment 5:  Browse...

Attachment 1 Description: CALENDAR 2015

Attachment 2 Description:

Attachment 3 Description:

Attachment 4 Description:

Attachment 5 Description:

**Update Attachments**

Detail Description	Charge Number	ITEM	Reg Hours	OT Hours	Amount
valid test	210062590200WBH76020000	0002			33.3
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Totals:</b>			0.0	0.0	\$3

**Add Row**

**Save** **Clear**

**Submit For Approval** **Delete Invoice**

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Anytime any change has been made to the Invoice, the Invoice will need to be submitted OR resubmitted for Approval if it was previously sent to the Approver who may have already approved it or disapproved it. It is also possible the Approver never reviewed it and it remained in the *Submitted* status.

This is the lesson that requires the *UPDATE ATTACHMENTS icon* to be selected in the process. Click the Claim Detail link left side of screen to continue with the process.

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VIP INVOICING SCREEN - ACCOUNT/INVOICE NUMBER 

Miscellaneous Claiming Accounts

(Click on the Billing Account Number to enter a new invoice or click on the Claim Detail link to work with an existing invoice)

Billing Account	Account Owner	Account Description	PO Number	Invoice Number	Invoice Date	Description	Claim Status	End Billing Period
<a href="#">MDA700100</a>	MFCMiscIBT, MiscMFC	LM Energy Test Misc	4102244327	LMBT01	Jul 1, 2016	Travel to Hawaii	Working	Jun 24, 2016

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In the example below we will delete one attachment by clicking the **Delete** button first and no need to space out the Attachment Description. Next click the **Update Attachments** icon.

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### VIP MISCELLANEOUS CLAIMS SCREEN

MFCMiscIBT, MiscMFC - MDA700100 - 4102244327 - LM Energy Test Misc
Invoice Numbers: LMIBT01 - Travel to Hawaii

**NAME:** MFCMiscIBT, MiscMFC

**PO NUMBER:** 4102244327

**INVOICE NUMBER:** LMIBT01

**DESCRIPTION:** Travel to Hawaii

**ID:** EX\_000700473

**INVOICE DATE:** Jul 1, 2016

**ACCOUNT:** MDA700100

**END BILLING PERIOD:** Jun 24, 2016

**STATUS:** Working

Attachment 1: [calendar2015.pdf](#)  Delete

Attachment 2: [calendar12016.pdf](#)  Delete

Attachment 3:  Browse...

Attachment 4:  Browse...

Attachment 5:  Browse...

Attachment 1 Description: Travel Expenses

Attachment 2 Description: CALENDAR 2016

Attachment 3 Description:

Attachment 4 Description:

Attachment 5 Description:

Detail Description	Charge Number	ITEM	Reg Hours	OT Hours	Amount	Supplier Name
Airline Ticket	QELPIT0100010PN8	0002			1001.55	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Totals:</b>			0.0	0.0	\$1,001.55	

This next pop up window will appear in the process. Click the icon that is applicable. In this example we will click the **OK** icon so the attachment selected will be deleted.

DESCRIPTION:

Travel to Hawaii

Attachment 1: [calendar2015.pdf](#)  Delete

Attachment 2: [calendar 12016.pdf](#)  Delete

Attachment 3:  Browse...

Attachment 4:  Browse...

Attachment 5:  Browse...

Update Attachments

Detail Description

Airline Ticket
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

Charge Number

QELPIT0100010PN8
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

Add Row

Attachment 1 Description: Travel Expenses


Attachment 2 Description: CALENDAR 2016

Attachment 3 Description:

Attachment 4 Description:

Attachment 5 Description:

Message from webpage

 This will update Attachments only. Do you want to continue.

Amount

1001.55
<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

Supplier Name

<input type="text"/> ?
<input type="text"/> ?
<input type="text"/> ?
<input type="text"/> ?
<input type="text"/> ?

Totals: 0.0 0.0 \$1,001.55

Save Clear

Submit For Approval Delete Invoice



Notice the message at the top left of page about the attachment. Notice the 2<sup>nd</sup> Attachment is removed along with the Attachment Description. At this point there is no need to click the SAVE icon like the previous lesson. However the SAVE icon will be required if other fields are changed such as a charge number, line item, dollars, etc from the bottom half of the screen. Click the **SUBMIT FOR APPROVAL** icon to complete the process. This completes this lesson of How to Delete an Attachment utilizing the UPDATE ATTACHMENTS icon.

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### VIP MISCELLANEOUS CLAIMS SCREEN

Attachments have been updated.

MFCMiscIBT, MiscMFC - MDA700100 - 4102244327 - LM Energy Test Misc

**Invoice Numbers:** LMIBT01 - Travel to Hawaii

<b>NAME:</b>	MFCMiscIBT, MiscMFC	<b>ID:</b> EX_000700473	<b>ACCOUNT:</b>	MDA700100	<b>STATUS:</b>	Working
<b>PO NUMBER:</b>	4102244327	<b>INVOICE DATE:</b>	Jul 1, 2016	<b>END BILLING PERIOD:</b>	Jun 24, 2016	
<b>INVOICE NUMBER:</b>	LMIBT01					
<b>DESCRIPTION:</b>	Travel to Hawaii					

Attachment 1: <a href="#">calendar2015.pdf</a> <input type="radio"/> Delete Attachment 2: <input type="text"/> Browse... Attachment 3: <input type="text"/> Browse... Attachment 4: <input type="text"/> Browse... Attachment 5: <input type="text"/> Browse...	Attachment 1 Description: Travel Expenses Attachment 2 Description: <input type="text"/> Attachment 3 Description: <input type="text"/> Attachment 4 Description: <input type="text"/> Attachment 5 Description: <input type="text"/>
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**Update Attachments**

Detail Description	Charge Number	ITEM	Reg Hours	OT Hours	Amount	Supplier Name
Airline Ticket	QELPIT0100010PN8	0002			1001.55	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<b>Totals:</b>			0.0	0.0	\$1,001.55	

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