



iReceivables Self Service Portal Customer Training Guide

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If you have any questions about iReceivables, please reach out to your HNI Credit Analyst.



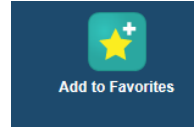
Adding Favorite's to Home Page

Objective: To add Favorite to oracle home screen. For easier one click access to iReceivables.

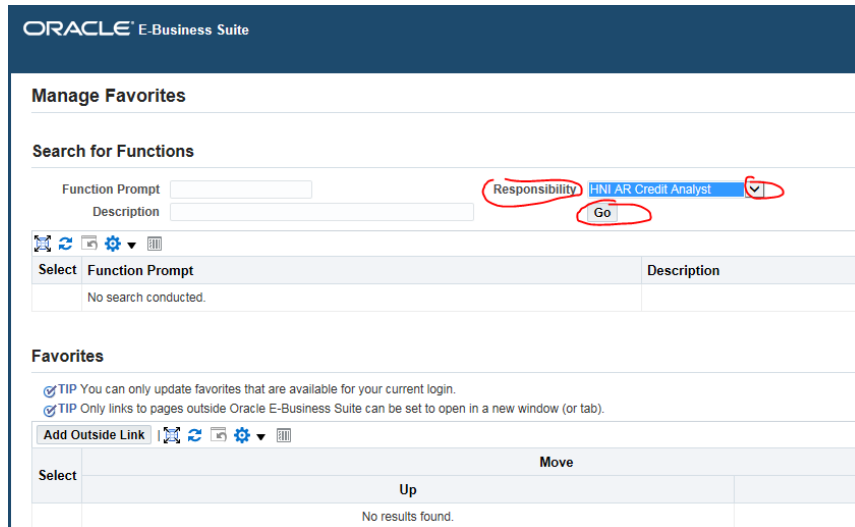
Prerequisite: Access to Oracle

Process:

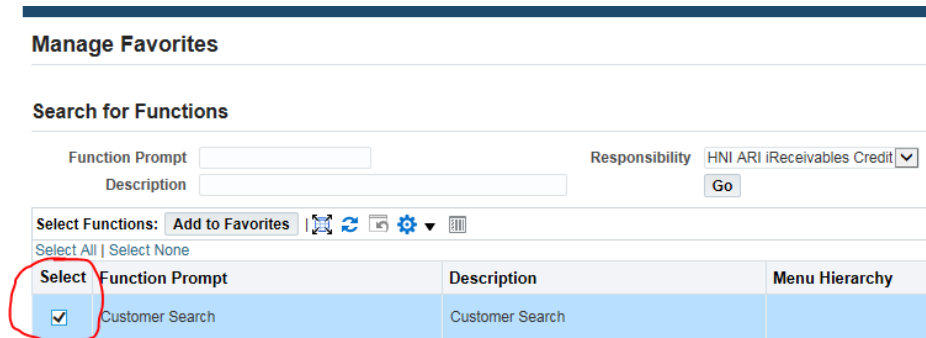
Adding Favorites (icons)



1. Click on “Add to Favorites” icon from main screen.
2. Click on the Responsibility drop down arrow
3. Click on the Responsibility HNI ARI Customer Access
4. Click on Go



5. Select the function “Customer Search” by putting a check in the box under Select.





6. Then click on Add to Favorites

Manage Favorites

Search for Functions

Function Prompt Responsibility

Description

Select Functions: **Add to Favorites**

Select All | Select None

Select	Function Prompt	Description	Menu Hierarchy
<input checked="" type="checkbox"/>	Customer Search	Customer Search	

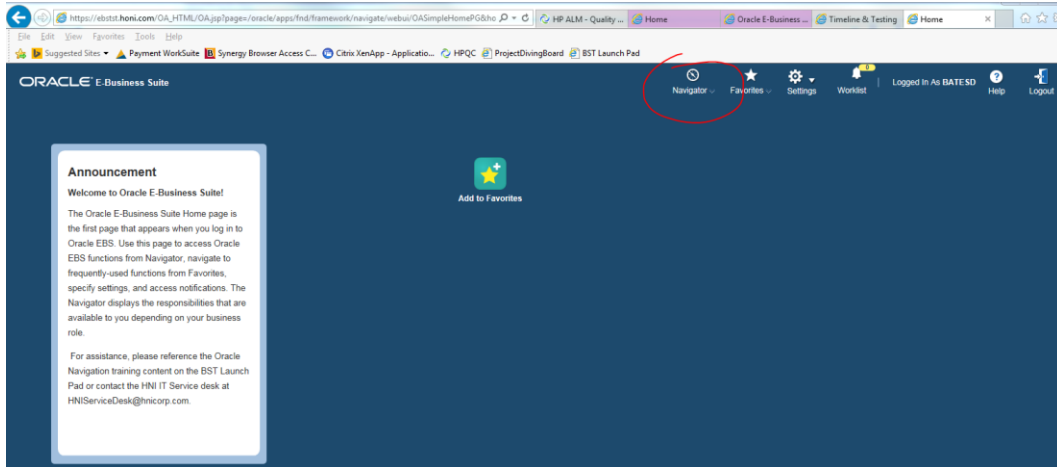
7. Selected item will then move to the bottom of the screen.
8. Click Apply at top of screen.
9. Returns you to the home page.

Opening iReceivables without a Favorite setup

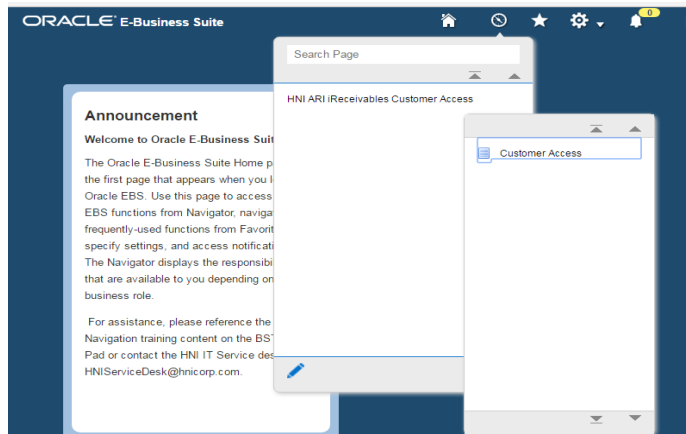
Objective: To be able to get into iReceivables from the Oracle Page using Navigator.

Procedure: Once signed in (using URL provided) you will see a screen that looks like the one below.

1. Click on Navigator (compass top of screen)



2. You will have one Responsibility that will show which is HNI ARI iReceivables Customer Access
3. Click on or hover over **HNI ARI iReceivables Customer Access** – Another box will pop up
4. Click on or hover over **Customer Search**
5. Click on **Customer Search**



6. iReceivables will then open.



iReceivables

Objective: To utilize iReceivables for printing & viewing, invoices and statements.

The opening screen for iReceivables will appear as shown below. Click on GO.

Customers

Search

Search By Customers **Go**

Show All Sites

Show All Customers

TIP Used only when coming into the page

Customer Name	Customer Number	Organization
No results found.		

This will list your bill to accounts for your company.

Customers


Search

Search By Customers **Go**

Show All Sites

Customer Name [△]	Customer Number [△]	Organization	Address [△]	Address Type [△]	Primary Contact [△]	Contact Phone [△]	Account Summary
TEST ACCOUNT	8176	All Organizations	All Locations		DENA BATES		☰
TEST ACCOUNT	8176	HNI	200 OAK ST, MUSCATINE, IA, 52761-4341, United States	Bill To, Ship To, Sold To	RECEIVING 1	563-272-7060	☰
TEST ACCOUNT	8176	HNI	408 E 2ND ST, MUSCATINE, MUSCATINE, IA, 52761-4140, United States	Bill To, Sold To			☰

TIP You can view an account only if the Address is 'All Locations' or the Address Type includes 'Bill To'.

1. This will bring up several lines. You want to click on the Eyeglasses  that is on the line with **ALL LOCATIONS**.

Note: This is not just the HNI operating company, but all your **sites** for the specific HNI operating company.

Note: For customers with a large quantity of invoices, it will take several minutes for all details to be pulled in to the dashboard.



Customers

Search

Search By Customers
 Show All Sites

Customer Name	Customer Number	Organization	Address	Address Type	Primary Contact	Contact Phone	Account Summary
TEST ACCOUNT	8176	All Organizations	All Locations		DENA BATES		00
TEST ACCOUNT	8176	HNI	200 OAK ST, MUSCATINE, IA, 52761-4341, United States	Bill To, Ship To, Sold To	RECEIVING 1	563-272-7060	00
TEST ACCOUNT	8176	HNI	408 E 2ND ST, MUSCATINE, MUSCATINE, IA, 52761-4140, United States	Bill To, Sold To			00

TIP You can view an account only if the Address is 'All Locations' or the Address Type includes 'Bill To'.

2. After clicking on the eyeglasses, you will see the Dashboard tab of your account.

This will show account balance for your selection as well as past dues and open credits.

Dashboard Account Requests

Account Summary

Currency **USD**

Your Account Balance: USD 35,862.98

Overdue Receivables 3,707.92

Total Open Receivables 35,862.98

Open Payments 0.00

Unapplied Credit Memos 0.00

Account Balance 35,862.98

Pending Credit Requests 0.00

Remaining Guarantee 0.00



Printing or Viewing Invoices

1. Click on “Account” tab OR you can click on any of the \$ amounts listed on home screen

Dashboard **Account** Requests

Account Summary

Currency **USD**

Your Account Balance: USD 35,862.98

Overdue Receivables 3,707.92 [▶ Show Aging](#)

Total Open Receivables 35,862.98

Open Payments 0.00

Unapplied Credit Memos 0.00

Account Balance 35,862.98

Pending Credit Requests 0.00

Remaining Guarantee 0.00

▶ **Statement Download**

▶ **Discount Alerts**

▶ **Dispute Status**

2. Select the invoice or invoices to be printed (See search options in next training section).
3. Click on Print button

Dashboard **Account** Requests

My Account | Paying Account

Account Details

Account Balance: 235,338.55

Search

Status **Open/pending** Currency **USD**

Transaction Transaction Type **All Transactions**

▶ Show More Search Options

Total Transactions 32 Total Original Amount 360,030.30

Select All 32

Select Transactions:

Select All | Select None

Select	Organization	Transaction	Type	Status	Date	Due Date	P
<input type="checkbox"/>	HNI	155969	Invoice	Open	15-Apr-2018	15-May-2018	50
<input type="checkbox"/>	HNI	145898	Credit Memo	Overdue	09-Apr-2018	09-Apr-2018	IN
<input checked="" type="checkbox"/>	HNI	144727	Invoice	Overdue	06-Apr-2018	06-May-2018	50
<input checked="" type="checkbox"/>	HNI	143515	Invoice	Overdue	05-Apr-2018	05-May-2018	50
<input type="checkbox"/>	HNI	134641	Invoice	Overdue	28-Mar-2018	27-Apr-2018	50



4. Invoice will open in your current screen.
5. You can Save or Print from this screen.

THE ONLY WAY TO GO BACK TO ACCOUNT DETAIL IS USING THE BACK BUTTON.

INVOICE DATE	INVOICE NUMBER	TOTAL AMOUNT DUE	DUE DATE
04/05/2018	144272	\$ 1,344.08	05/05/2018

PLEASE REMIT TO:
The HON Company LLC
P.O. Box 404422
Atlanta GA 30384-4422
E.F.T TO ACCT 37562-76567
ABA# 111000012

NOTE: You can only print invoices dated 2-1-18 or later. Invoices from our old operating system will not print in Oracle. If you receive an error to contact your System administrator that most likely means you are trying to print an invoice from our old system.



Searching for an invoice on Account Screen in iReceivables

To search for a particular invoice you can search by the Transaction/Invoice # using the Transaction field. You cannot search by any other option other than Transaction/Invoice #.

1. Type in the Transaction # to be found
2. Click on Go

The screenshot shows the 'Account Details' section of the iReceivables interface. Under the 'Search' heading, there are several input fields: 'Status' (set to 'Open/pending'), 'Currency' (set to 'USD'), 'Transaction' (containing '179306'), and 'Transaction Type' (set to 'All Transactions'). Below these fields is a 'Show More Search Options' link. At the bottom of the search area, there are 'Go' and 'Clear' buttons. Red circles highlight the '179306' in the Transaction field and the 'Go' button.

In the Status field you can search by Open, Past Due, and various other aging invoice

This screenshot shows the same 'Account Details' search form as above, but with the 'Status' dropdown menu open. The menu lists the following options: 'Any Status', 'Closed', 'Open/pending' (which is highlighted), 'Overdue', '1-30 Days Past Due', '31-60 Days Past Due', '61-90 Days Past Due', '91-180 Days Past Due', '181-360 Days Past Due', '361+ Days Past Due', and 'Current'. The 'Go' button is visible at the bottom right of the search area.



Search by Date or Amount on the Account screen

On the Account screen click on the “Show More Search Options”

Dashboard **Account** Requests

My Account | Paying Account

Account Details

Account Balance: 58,663.77

Search

Status: Open/pending Currency: USD

Transaction: Transaction Type: All Transactions

Show More Search Options

Go Clear

Total Transactions 86 Total Original Amount 121,318.07

Select All 86

Select Transactions: Pay Dispute Add to Transaction List Print Apply Credits

Select All | Select None

Select	Organization	Transaction	Type	Status	Date	Due Date	Pl
<input type="checkbox"/>	HNI	201147	Invoice	Open	18-May-2018	17-Jun-2018	C
<input type="checkbox"/>	HNI	201147	Invoice	Open	18-May-2018	17-Jun-2018	C

This will open a date range form and you can select dates of transactions you want to see. You can also search by a certain amount range.

The Status drop down list can be changed as well to various options as shown previously. Once selection has been made, click on Go.

Dashboard **Account** Requests

My Account | Paying Account

Account Details

Account Balance: 58,663.77

Search

Status: Open/pending Currency: USD

Transaction: Transaction Type: All Transactions

Hide More Search Options

Transaction Amount From To

Due Date From To

Transaction Date From 08-May-2018

To 19-May-2018

Go Clear

Total Transactions 86 Total Original Amount 121,318.07

Select All 86

Select Transactions: Pay Dispute Add to Transaction List Print Apply Credits

Select All | Select None

Select	Organization	Transaction	Type	Status	Date	Due Date	Pl
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Creating a Statement in iReceivables

Procedure: Print a statement in iReceivables. To begin, you must be logged in iReceivables.

The opening screen for iReceivables will appear as shown below. Showing your bill to accounts for your company.

Customers


Search

Search By Customers

Show All Sites

Customer Name ^	Customer Number ^	Organization	Address ^	Address Type ^	Primary Contact ^	Contact Phone ^	Account Summary
TEST ACCOUNT	8176	All Organizations	All Locations		DENA BATES		oo
TEST ACCOUNT	8176	HNI	200 OAK ST, MUSCATINE, IA, 52761-4341, United States	Bill To, Ship To, Sold To	RECEIVING 1	563-272-7060	oo
TEST ACCOUNT	8176	HNI	408 E 2ND ST, MUSCATINE, MUSCATINE, IA, 52761-4140, United States	Bill To, Sold To			oo

TIP You can view an account only if the Address is 'All Locations' or the Address Type includes 'Bill To'.

1. This will bring up several (two or three) lines. You want to click on the Eyeglasses  that is on the line with **ALL LOCATIONS**.

Note: This is not just the HNI operating company, but all your **sites** for the specific HNI operating company.

Customers

Search

Search By Customers

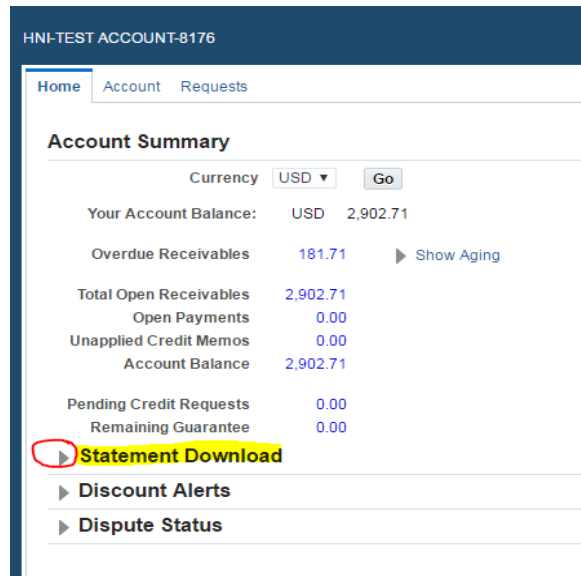
Show All Sites

Customer Name ^	Customer Number ^	Organization	Address ^	Address Type ^	Primary Contact ^	Contact Phone ^	Account Summary
TEST ACCOUNT	8176	All Organizations	<u>All Locations</u>		DENA BATES		oo
TEST ACCOUNT	8176	HNI	200 OAK ST, MUSCATINE, IA, 52761-4341, United States	Bill To, Ship To, Sold To	RECEIVING 1	563-272-7060	oo
TEST ACCOUNT	8176	HNI	408 E 2ND ST, MUSCATINE, MUSCATINE, IA, 52761-4140, United States	Bill To, Sold To			oo

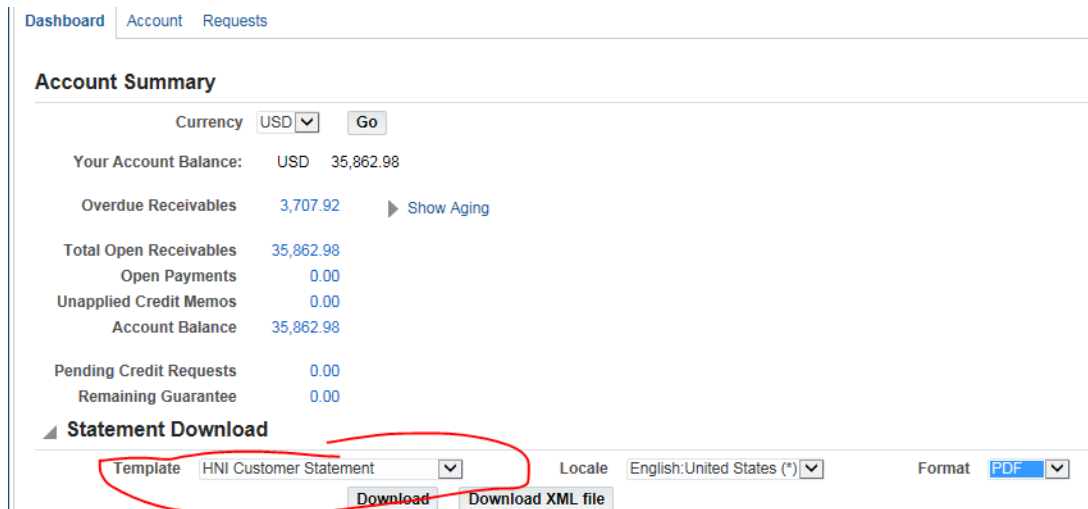
TIP You can view an account only if the Address is 'All Locations' or the Address Type includes 'Bill To'.



2. After clicking on the eyeglasses you will see the Dashboard tab.
3. On the Dashboard tab, you will see “Statement Download”
4. Click on the Arrow at the left of Statement Download



5. From the Statement Download section click on the drop down arrow and select HNI Customer Statement





- From the Format section select PDF from the drop down arrow

The screenshot shows the 'Account Summary' page with the following data:

Account Summary	
Currency	USD <input type="button" value="Go"/>
Your Account Balance:	USD 35,862.98
Overdue Receivables	3,707.92 ▶ Show Aging
Total Open Receivables	35,862.98
Open Payments	0.00
Unapplied Credit Memos	0.00
Account Balance	35,862.98
Pending Credit Requests	0.00
Remaining Guarantee	0.00

Statement Download

Template: Locale: Format:

- Click on Download

The screenshot shows the 'Account Summary' page with the following data:

Account Summary	
Currency	USD <input type="button" value="Go"/>
Your Account Balance:	USD 35,862.98
Overdue Receivables	3,707.92 ▶ Show Aging
Total Open Receivables	35,862.98
Open Payments	0.00
Unapplied Credit Memos	0.00
Account Balance	35,862.98
Pending Credit Requests	0.00
Remaining Guarantee	0.00

Statement Download

Template: Locale: Format:

- Statement can then be reviewed or printed.

If you have any questions about iReceivables, please reach out to your HNI Credit Analyst.