

The University of Texas Rio Grande ValleyTM

Accounts Receivable

Conversation - Update Contacts


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Objective

***To Properly View and/or Update
Conversation Contacts
in
PeopleSoft 9.2
Accounts Receivable Module
by Explanation, Demonstration, & Practical Application***

Navigation


- Log in to PeopleSoft 9.2
-  NavBar: Navigator > Financials > Accounts Receivable > Customer Interactions > Conversations > Update Contacts


Contacts

Enter any information you have and click Search. Leave fields blank for a list of all values.


[Find an Existing Value](#) [Add a New Value](#)


▼ **Search Criteria**

SetID = 

Contact ID begins with 


Contact Name begins with

Customer SetID begins with 

Customer ID begins with 

Customer Name begins with

Include History Correct History Case Sensitive

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)


[Find an Existing Value](#) | [Add a New Value](#)


Conversation - Update Contacts

- Click **Add a New Value** tab
- Enter SetID: **UTRNS**
- Contact ID: NEXT (default)
- Click **Add** button

Contacts

[Find an Existing Value](#) | [Add a New Value](#)

SetID 

Contact ID 

[Find an Existing Value](#) | [Add a New Value](#)

Data Entry

- **Maintain Contacts** page appears

Contact Information

Maintain Contacts

SetID UTRNS Contact ID NEXT

Contact Information Find | View All First 1 of 1 Last

*Effective Date 06/12/2018 *Status Active

*Name *Contact Flag External Contact

Title

Email Address

Salutation Code

Salutation

*Preferred Communication Call

Language Code English

Person ID

Contact Customers Contact Phone and Type

User Profile

Save Notify Add Update/Display Include History Correct History

Data Entry

- Enter
 - Effective Date: today's date (default)
 - Status: Active (default)
 - Name: (i.e., John Testing Contact I)
 - Contact Flag: External Contact (default)
 - Title: (i.e., Test AP Manager)
 - Email Address: (i.e., JTContact@ELQ.com)
 - Salutation Code: optional
 - Salutation: optional
 - *Preferred Communication: Call (default) or use pull down for other options
 - Language Code: English (default) or use pull down for other options

The screenshot shows a web-based form for entering contact information. The form is titled 'Contact Information' and is part of a 'Maintain Contacts' section. It includes a table header with 'SetID UTRNS' and 'Contact ID NEXT'. Below the header, there is a search bar with 'Find | View All' and navigation buttons for 'First', '1 of 1', and 'Last'. The form fields are as follows:

- *Effective Date: 06/12/2018
- *Status: Active
- *Name: John Testing Contact
- *Contact Flag: External Contact
- Title: Test AP Manager
- Email Address: jtcontact@elq.com
- Salutation Code: (empty)
- Salutation: (empty)
- *Preferred Communication: Call
- Language Code: English
- Person ID: (empty)

At the bottom of the form, there are several action buttons: 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

Data Entry

- Click **Contact Phone and Type** link



Data Entry

- Enter
 - Phone Type: BUSN
 - International Prefix: (i.e., 049) or none if in the US
 - Phone Number: (i.e., 30-2621634) or if in the US enter 867-5309
 - Extension: optional
 - Primary Phone: Check
 - + / - : to add or remove contact lines
 - Contact Type: optional
 - Description: optional

SetID UTRNS Contact ID NEXT

Contact Information Find | View All First 1 of 1 Last

Effective Date 06/12/2018 Name John Testing Contact

Contact Phone Information Personalize | Find | View All | First 1 of 1 Last

| *Phone Type | International Prefix | Phone Number | Extension | Primary Phone | | |
|-------------|----------------------|--------------|-----------|-------------------------------------|---|---|
| BUSN | 049 | 30 2621634 | | <input checked="" type="checkbox"/> | + | - |

Contact Type Information Personalize | Find | View All | First 1 of 1 Last

| Contact Type | Description | | |
|--------------|-------------|---|---|
| | | + | - |

Data Entry

- Click **Contact Customer** link



Data Entry

- Enter

- Customer ID: (use lookup option to find associated entity) (i.e., NSP309690)
- Location: (use lookup option and use first option) (i.e., 1)
- Check Box DEFAULTS for Primary Bill To, Primary Ship To, & Primary Sold To (optional to leave or remove (for training purposes remove checks))

Contact SetID UTRNS Contact ID NEXT

Contact Information Find | View All First 1 of 1 Last

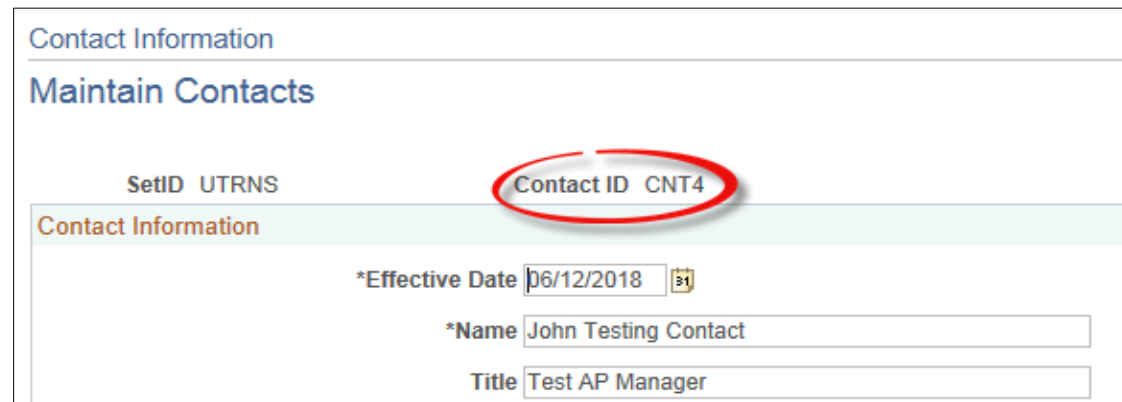
Effective Date 06/12/2018 Name John Testing Contact

Link Contact to Customer Personalize | Find | 1 of 1 Last

| *Customer SetID | *Customer ID | Customer Name | Location | | Credit Cards | Documentation | Primary Bill To | Primary Ship To | Primary Sold To | |
|-----------------|--------------|----------------|----------|-------------------|--------------|---------------|--------------------------|--------------------------|--------------------------|--------------------------|
| UTRNS | NSP309690 | Embassy Suites | 1 | Converted Address | Credit Cards | Documentation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Data Entry

- As soon as you enter a customer, PeopleSoft looks at the info relating to that customer. Any given Customer can have multiple locations one of which is the Primary Bill To, etc. You can just manually check those boxes on the contact page if they do not default in.
- Click **Save**
 - Contact ID is created/auto-numbered (i.e, CNT4)



The screenshot displays a web form titled "Contact Information" under the heading "Maintain Contacts". The form includes a table with columns "SetID" and "UTRNS", and a "Contact ID" field containing the value "CNT4", which is circled in red. Below the table, there are input fields for "*Effective Date" (06/12/2018), "*Name" (John Testing Contact), and "Title" (Test AP Manager).

| SetID | UTRNS | Contact ID |
|-------|-------|------------|
| | | CNT4 |

*Effective Date: 06/12/2018
*Name: John Testing Contact
Title: Test AP Manager

This Process Is Now Complete

Contact us at:

- If you have questions please contact: AccountsReceivable@utrgv.edu

The University of Texas
Rio Grande ValleyTM

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