

# The University of Texas Rio Grande Valley<sup>TM</sup>

Accounts Receivable

## View/Update Conversations

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Updated: 07/20/18


# Objective

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***To Properly View and/or Update Conversations  
in  
PeopleSoft 9.2  
Accounts Receivable Module  
Customer Interactions Component  
by Explanation, Demonstration, & Practical Application***

# Navigation

- Log in to PeopleSoft 9.2
- Fluid Tile:














 NavBar: Navigator > Financials > Customer Interactions > Conversations > View/Update Conversations

**View/Update Conversations**


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	=	▼	<input type="text"/>	
Business Unit	=	▼	<input type="text"/>	
Cust ID	begins with	▼	<input type="text"/>	
Customer Name	begins with	▼	<input type="text"/>	
Status	=	▼	<input type="text"/>	▼
Item ID	begins with	▼	<input type="text"/>	
Invoice	begins with	▼	<input type="text"/>	
Contract	begins with	▼	<input type="text"/>	
Bill of Lading	begins with	▼	<input type="text"/>	
Purchase Order Reference	begins with	▼	<input type="text"/>	
Payment ID	begins with	▼	<input type="text"/>	
Order No	begins with	▼	<input type="text"/>	
Subject	begins with	▼	<input type="text"/>	
Subject Topic	begins with	▼	<input type="text"/>	
Promise Date	=	▼	<input type="text"/>	

Case Sensitive

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

# View/Update Conversations

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- Click **Add A New Value** tab
- Enter
  - SetID: **UTRNS**
  - Business Unit: **UTRNS**
  - Customer ID:  
**NSP007644** (Valley Coca-Cola)
- Click **Add** button

### View/Update Conversations

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

SetID  🔍

Business Unit  🔍

Customer ID  🔍

[Add](#)

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

# Data Entry

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- **Conversations** page appears
- Enter
  - Status: Defaults to 'New'
  - Description: 'Invoice follow-up call'
  - Subject: Leave blank or select from magnifying glass
  - Sub-Topic: Leave blank or select from magnifying glass
  - Promise of Payment box: CHECK ONLY IF THIS APPLIES
  - In the Review box set date to contact date: Current Date
  - User ID: Auto-populates after entering date
  - Review Days: 30 (or enter agreed upon review days #)
  - In the Follow Up box set the Action to: 'CALL'
  - User ID: Auto-populates after entering Action
  - In Reference Tools box: enter content ONLY if it applies

# Data Entry

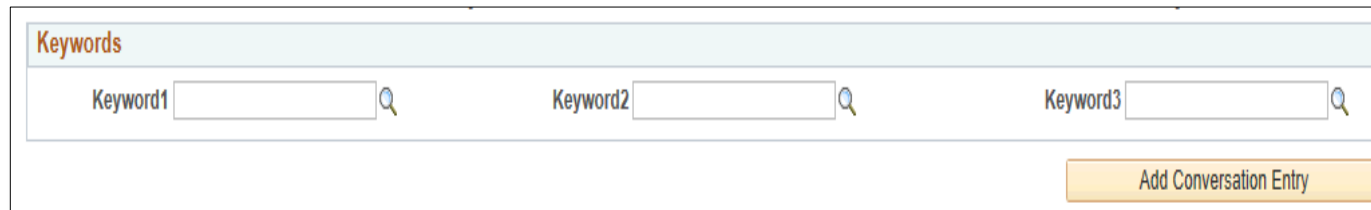
- **Conversations** page after data has been entered

Conversations	References	Attachments
SetID UTRNS	Business Unit UTRNS	Customer NSP007644 Valley Coca-Cola
*Status <input type="text" value="New"/>		*Description <input type="text" value="Invoice follow-up call"/>
Subject <input type="text"/>		Sub-Topic <input type="text"/>
<input type="checkbox"/> Promise of Payment		
<b>Review</b>	<b>Follow Up</b>	<b>Reference Totals</b>
Date <input type="text" value="07/12/2018"/> <input type="button" value="B1"/>	Action <input type="text" value="CALL"/>	Amount <input type="text" value="0.00"/> <input type="button" value="x"/>
Review Days <input type="text" value="30"/>	User ID <input type="text"/>	Currency <input type="text" value="USD"/>
User ID <input type="text" value="-----J2"/>	<input type="checkbox"/> Done	Promise Date <input type="text"/>
<input type="checkbox"/> Supervisor Review	Letter <input type="text"/>	
	Date	
Created On 06/12/18 11:16:13AM	Created By	Last Modified On 06/12/18 11:18AM
		Modified By

# Data Entry

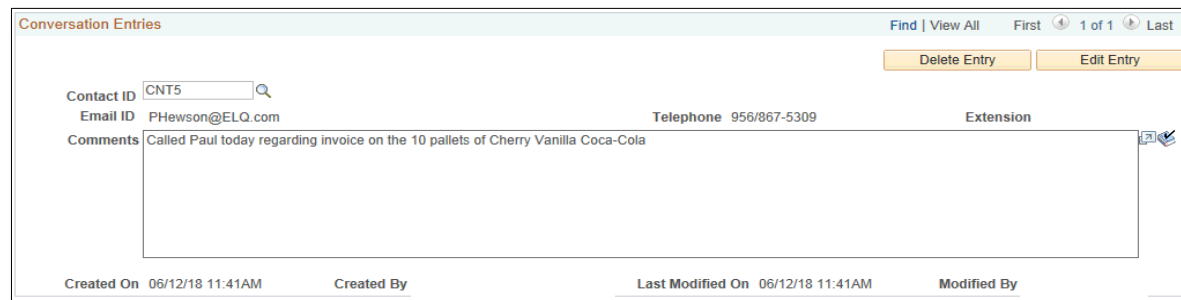
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- Enter Keywords:



The screenshot shows a form titled "Keywords" with a light blue header. Below the header are three input fields labeled "Keyword1", "Keyword2", and "Keyword3", each with a magnifying glass icon to its right. At the bottom right of the form is a yellow button labeled "Add Conversation Entry".

- In Conversation Entries enter
  - Contact ID: (i.e., CNT5)
  - Comments (i.e., Called Paul today regarding invoice.)

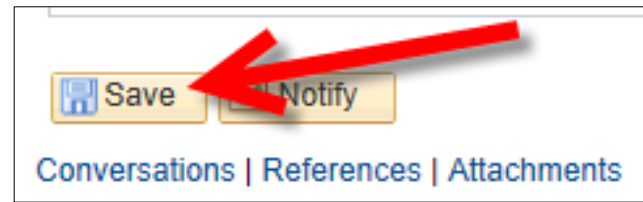


The screenshot shows a form titled "Conversation Entries" with a light blue header. At the top right, there are navigation links: "Find | View All", "First", "1 of 1", and "Last". Below these are two yellow buttons: "Delete Entry" and "Edit Entry". The form contains several fields: "Contact ID" with the value "CNT5", "Email ID" with the value "PHewson@ELQ.com", "Telephone" with the value "956/867-5309", and "Extension". Below these is a large text area for "Comments" containing the text "Called Paul today regarding invoice on the 10 pallets of Cherry Vanilla Coca-Cola". At the bottom of the form, there are fields for "Created On" (06/12/18 11:41AM), "Created By", "Last Modified On" (06/12/18 11:41AM), and "Modified By".

# Data Processing

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- Click **Save** button



- Click **References** tab





# Data Entry

- Enter
  - Qualifier: 'I' (Item)
  - Reference ID: NS-0000019-INV (invoice)
  - SetID: 'UTRNS' Defaults
  - CustID: Populates based on Reference ID (invoice #)
  - Item Line: optional

The screenshot shows a software interface with three tabs: 'Conversations', 'References', and 'Attachments'. The 'References' tab is active. The main area contains the following fields:

SetID	UTRNS	Business Unit	UTRNS	Customer	NSP007644	Valley Coca-Cola
Date	06/12/2018	Description	Invoice follow-up call	Status	New	
Subject		Subject Topic		<input type="checkbox"/>	Include Closed Information	

Below the main fields is a section titled 'Related Transactions' with a toolbar containing 'Personalize', 'Find', 'View All', and navigation buttons. Below this is a table with the following columns: Qualifier, Reference ID, Reference Business Unit, Customer ID / Deposit ID, and Item Line.

Qualifier	Reference ID	Reference Business Unit	Customer ID / Deposit ID	Item Line
I	NS-0000019-INV	UTRNS	NSP007644	

At the bottom of the interface are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

- Click **Save** button

# Data Entry

- Review the information

The screenshot shows the 'Item Maintenance' window with the following details:

- Unit: UTRNS
- Customer: NSP007644 (Valley Coca-Cola)
- Item ID: NS-0000019-INV
- Line: (blank)
- Days Late: -17
- Status: Open

Balance: 150.00 USD

**Item Activities** (Find | View All | First | 1 of 1 | Last)

Sequence	Entry Type	Reason	Accounting Date	Posted Date
1	INV	NSP	05/30/2018	05/31/2018
Document		Worksheet Reason	Voucher ID	
Group Unit	UTRNS	Group ID	57	Billing
			Amount	150.00 USD

Buttons: OK, Cancel, Apply, Refresh, View Audit Logs

- Click **OK** button

# Data Entry

- Click on **Attachments** tab
  - In Document Attachments section
    - Click **Attach** button to open window
      - Select file to attach and submit
      - Provide Attachment Description

The screenshot shows a software interface with three tabs: Conversations, References, and Attachments. The Attachments tab is active. The interface displays the following information:

- SetID: UTRNS
- Business Unit: UTRNS
- Customer: NSP007644
- Valley Coca-Cola
- Date: 06/12/2018
- Description: Invoice follow-up call
- Status: New
- Subject
- Subject Topic

Below this information is a section titled "Document Attachments" with a toolbar containing "Personalize", "Find", "View All", and navigation buttons "First", "1 of 1", and "Last". A table with two columns, "Attached File" and "Description", is shown. An "Attach" button is located to the right of the table. At the bottom of the interface, there are buttons for "Save", "Notify", "Add", and "Update/Display".

- Click **Save** button

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This Process Is Now Complete

Contact us at:

- If you have questions please contact: [AccountsReceivable@utrgv.edu](mailto:AccountsReceivable@utrgv.edu)

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