The University of Texas Rio Grande Valley

Accounts Receivable

View/Update Conversations

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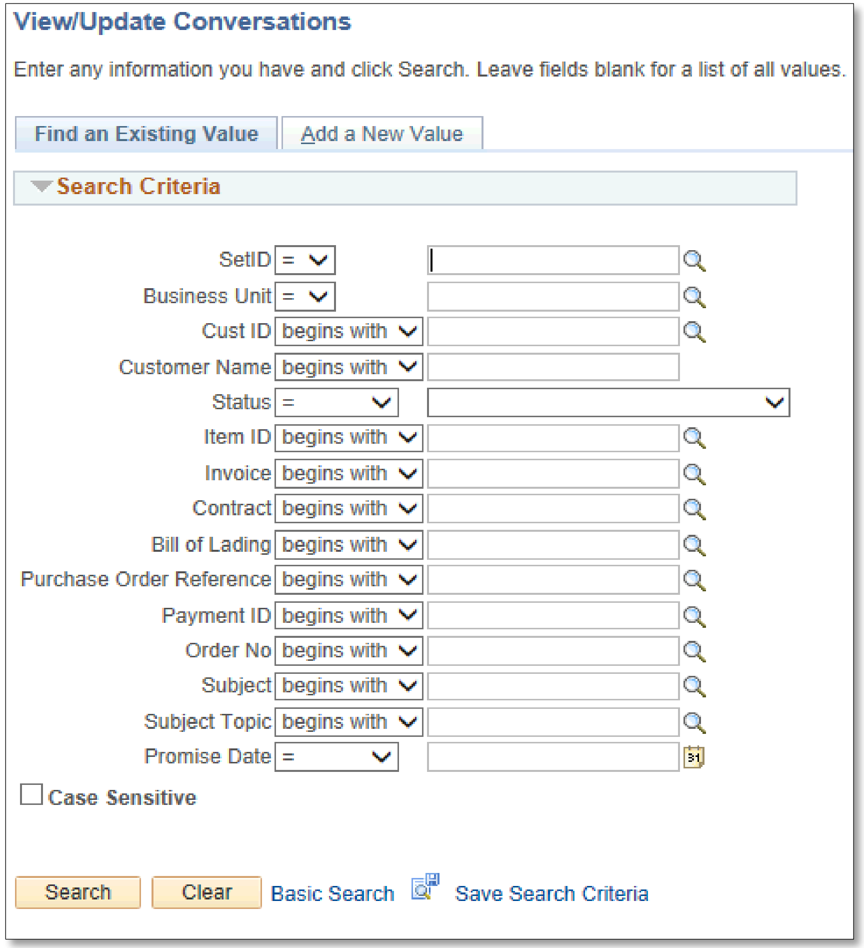
Updated: 07/20/18

Objective

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

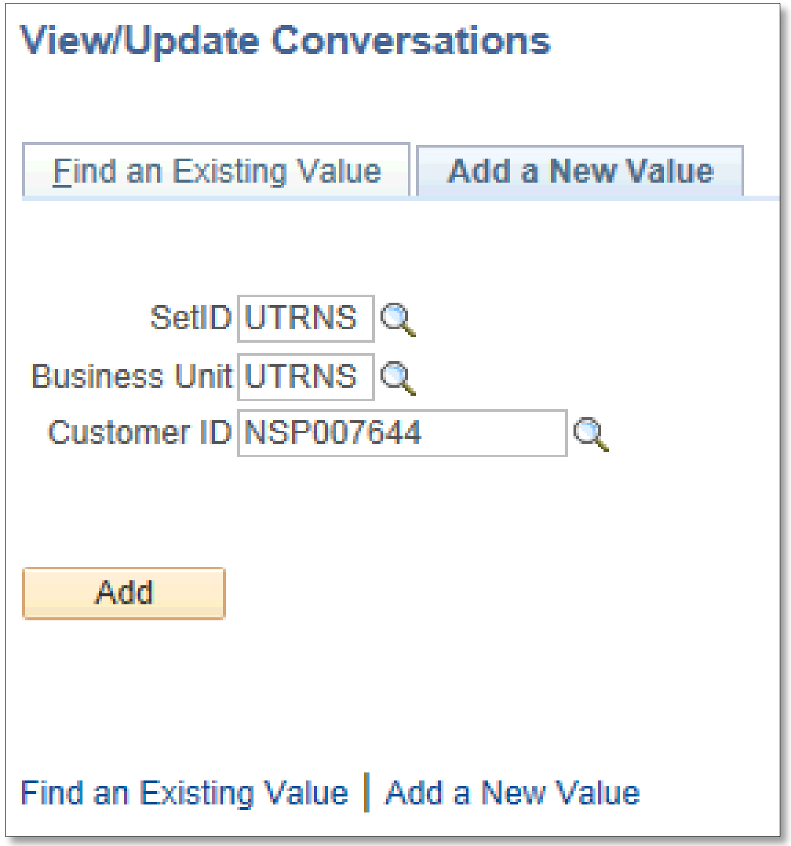
Navigation

- Log in to PeopleSoft 9.2
- Fluid Tile:
- NavBar: Navigator > Financials > Customer Interactions > Conversations > View/Update Conversations



View/Update Conversations

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

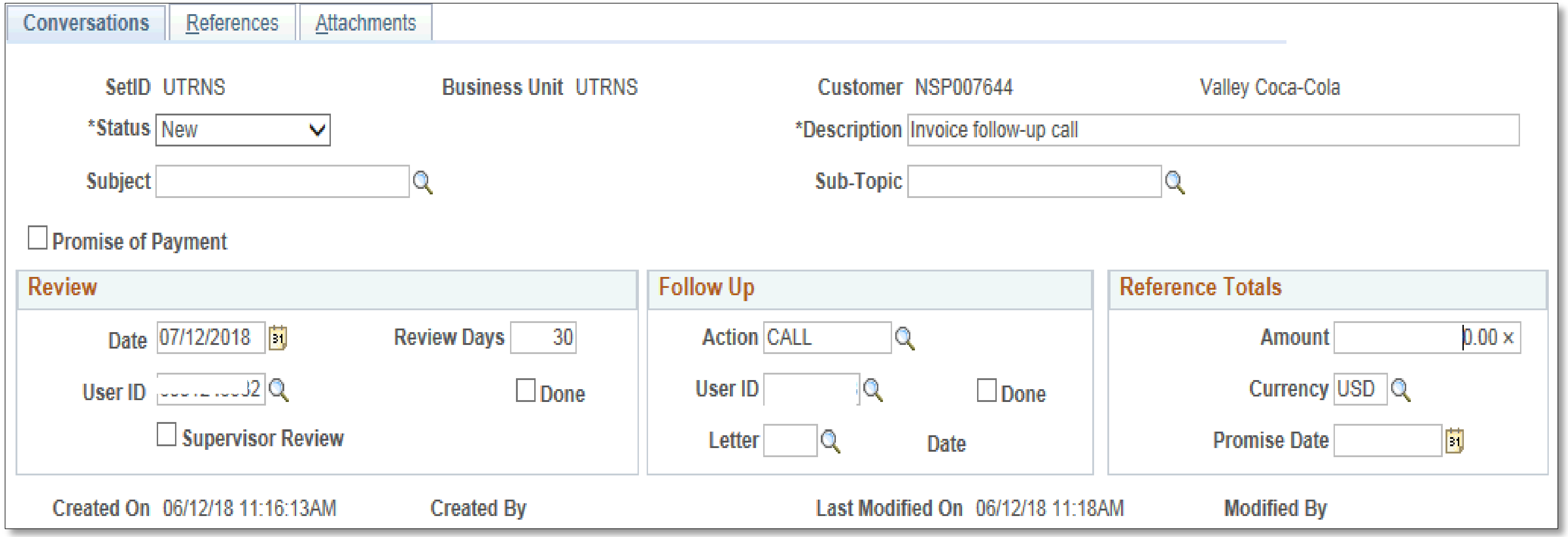


Data Entry

- **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

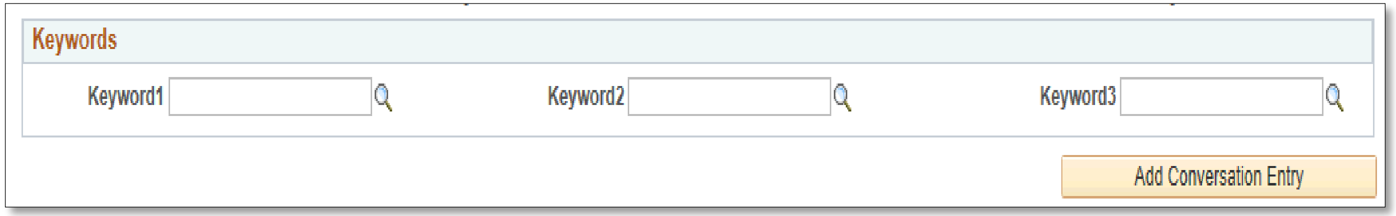
Data Entry

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

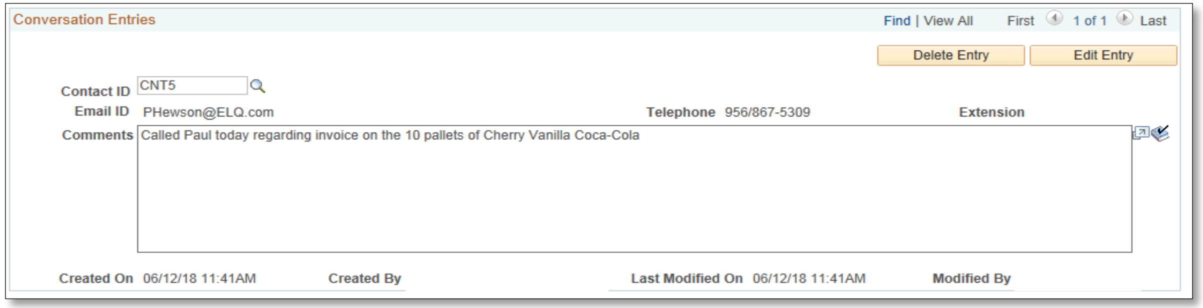


Data Entry

- Enter Keywords:

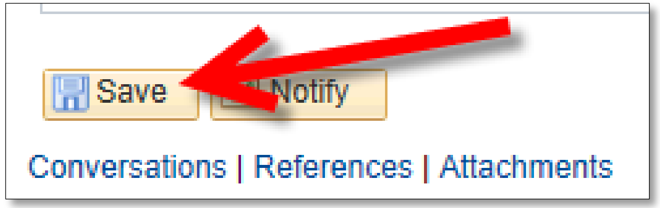


- In Conversation Entries enter
  - Contact ID: (i.e., CNT5)
  - Comments (i.e., Called Paul today regarding invoice.)



Data Processing

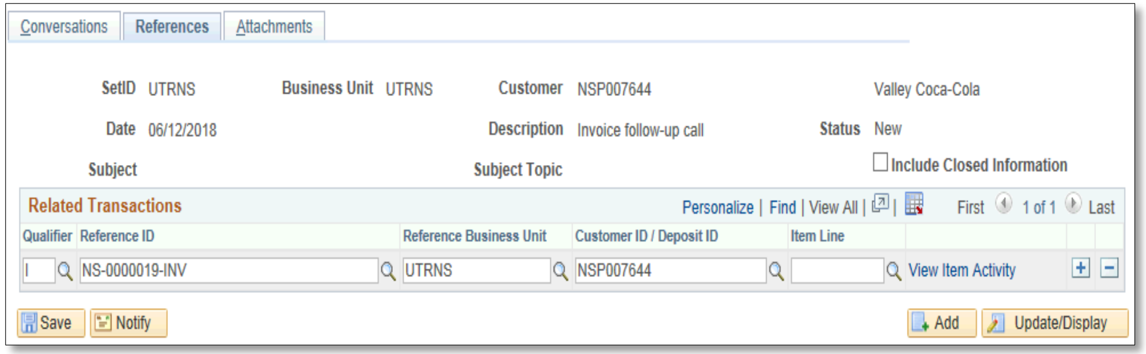
- Click **Save** button



- Click **References** tab

Data Entry

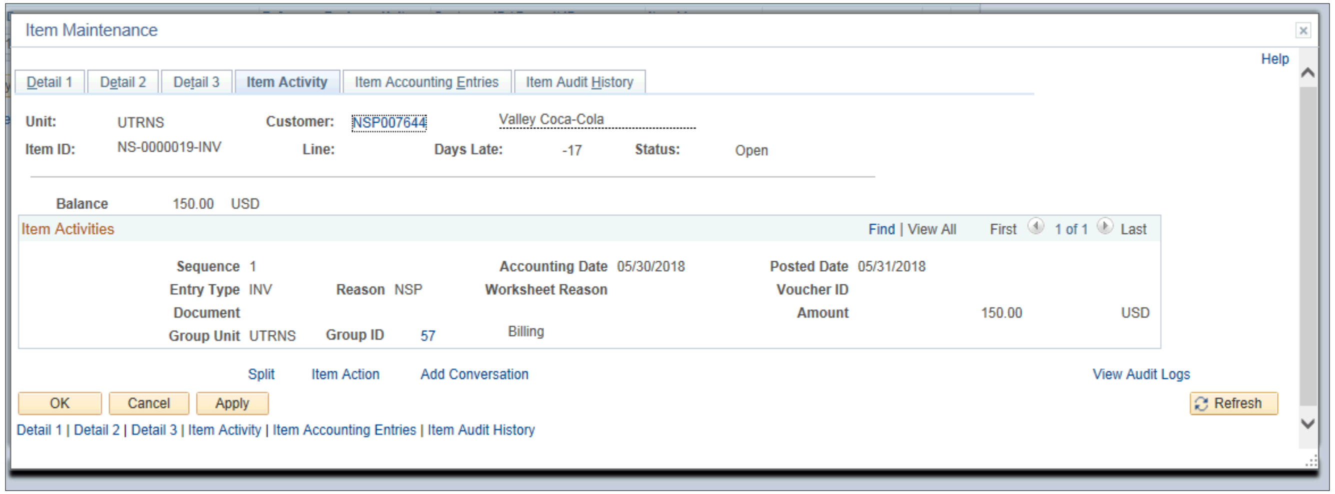
- Enter
  - Qualifier: 'I' (Item)
  - Reference ID: NS-0000019-INV (invoice)
  - SetID: 'UTRNS' Defaults
  - CustID: Populates based on Reference ID (invoice #)
  - Item Line: optional



- Click **Save** button

Data Entry

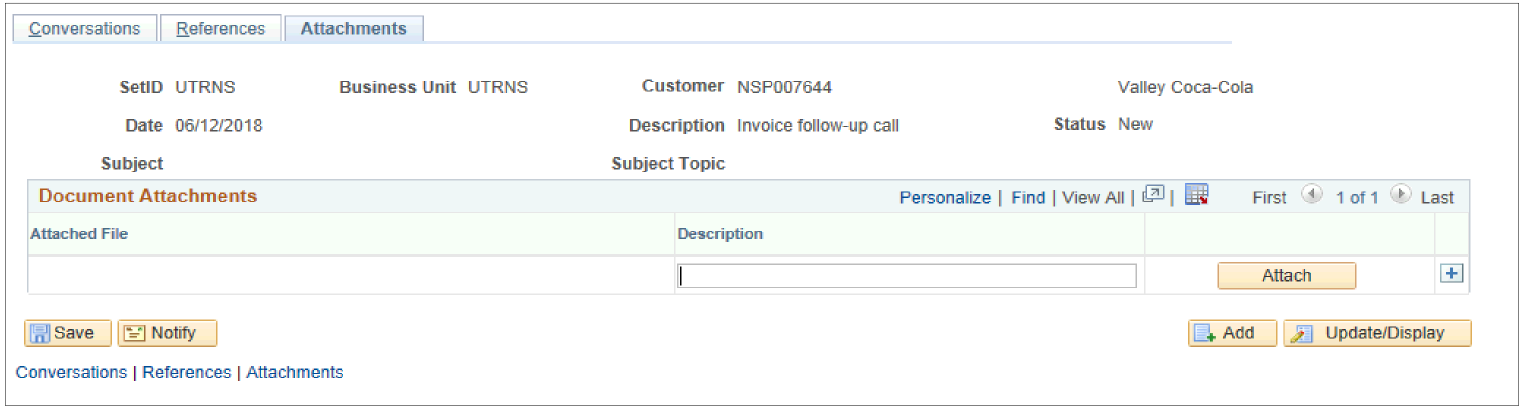
- Review the information



- 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



- Click **Save** button

This Process Is Now Complete

Contact us at:

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

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