Note: *Some screenshots and link labels may differ from what you see today. As development continues, these items will be tracked and updated.*

Accounts Receivable WorkCenter

The Accounts Receivable WorkCenter is designed to be a navigational center for end users. The New Core-CT Fluid functionality provides new ways to organize and navigate to some of your most commonly used pages. The Accounts Receivable WorkCenter features a revamped Fluid look which helps end users become more efficient by accessing frequently used pages and pagelets, based on their accounts receivable security roles. This job aid walks users through the basic functionalities of the new fluid Accounts Receivable WorkCenter.

Important Note*:** *Users must have their Filters defined to see results in the* ***My Work *section. For more information on how to define* ***Filters****, refer to the* [WorkCenter Personalization] *job aid.*

Accounts Receivable WorkCenter

Navigation:

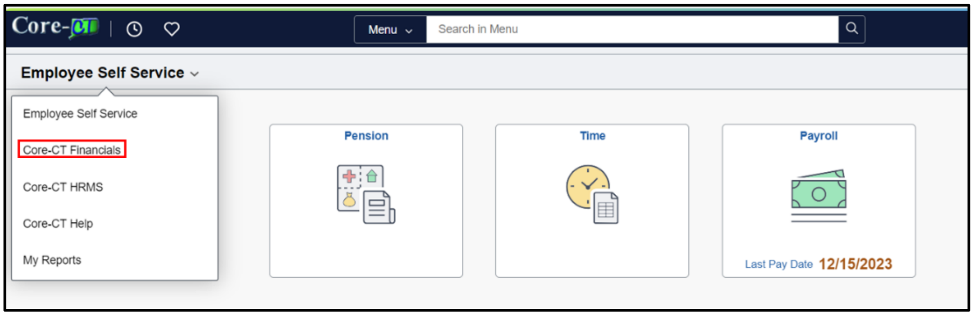
Nav Bar > Menu > Account Receivable > Receivables WorkCenter

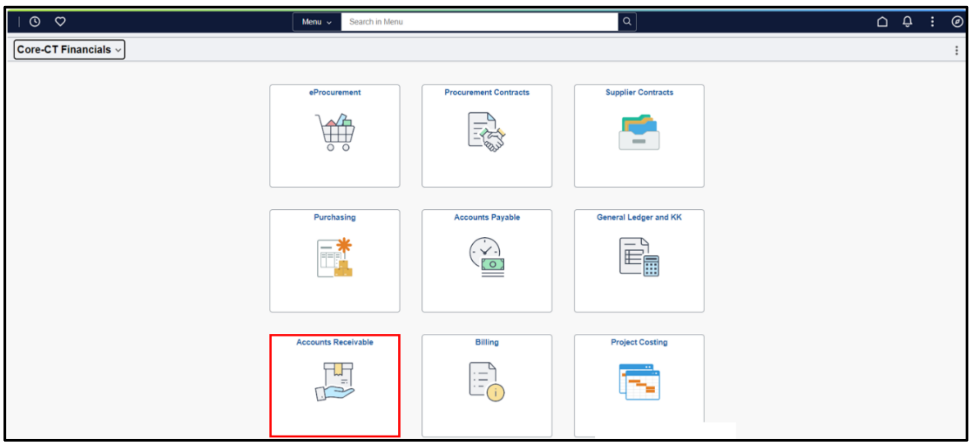
Or

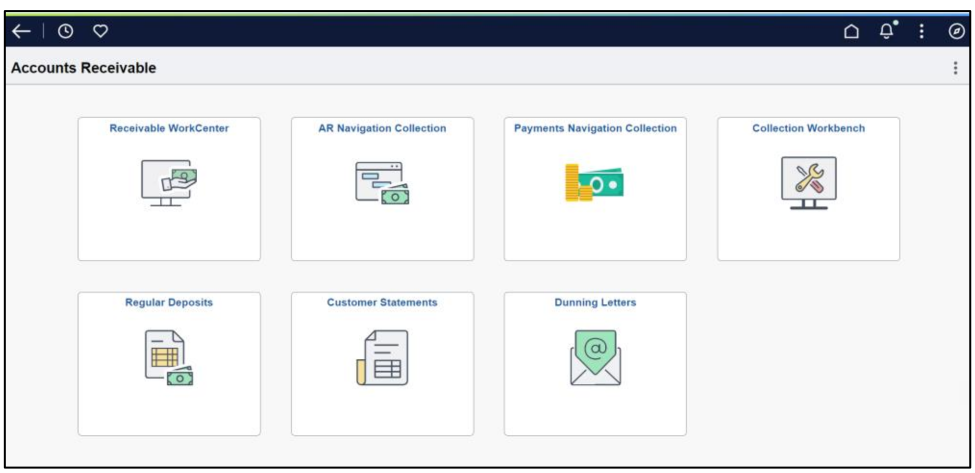
Select ***Core-CT Financials***

Click ***Accounts Receivable*** *Tile*

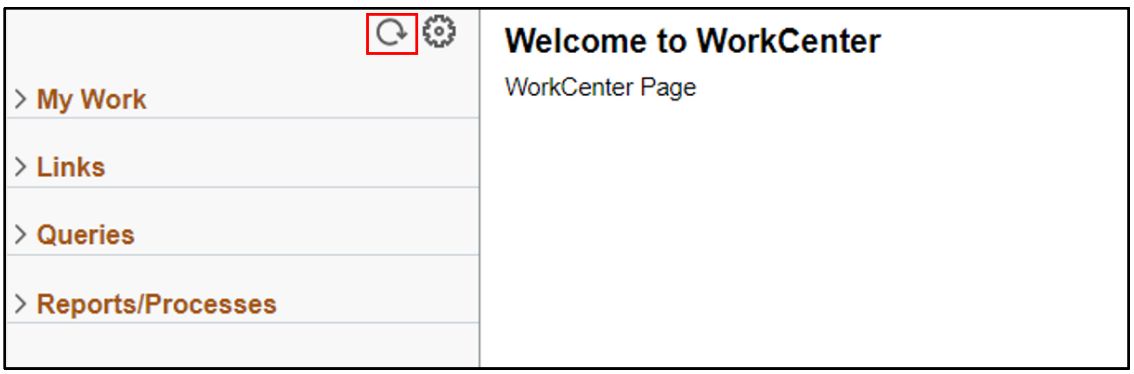
Click ***Receivables WorkCenter***


Menu
Search in Menu
Employee Self Service
Employee Self Service
Core-CT Financials
Core-CT HRMS
Core-CT Help
My Reports
Pension
Time
Payroll
Last Pay Date 12/15/2023

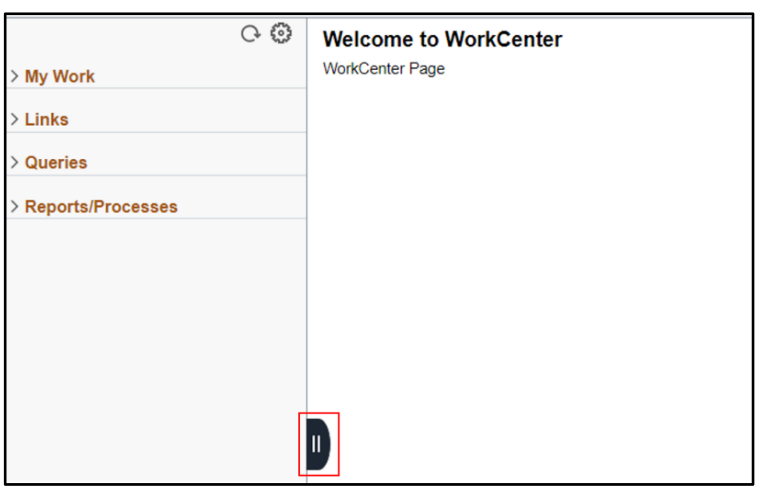

Menu
Search in Menu
Core-CT Financials
eProcurement
Procurement Contracts
Supplier Contracts
Purchasing
Accounts Payable
General Ledger and KK
Accounts Receivable
Billing
Project Costing


Accounts Receivable
Receivable WorkCenter
AR Navigation Collection
Payments Navigation Collection
Collection Workbench
Regular Deposits
Customer Statements
Dunning Letters

- ➢ To refresh the page, click the **Refresh** button located in the upper left-hand corner.



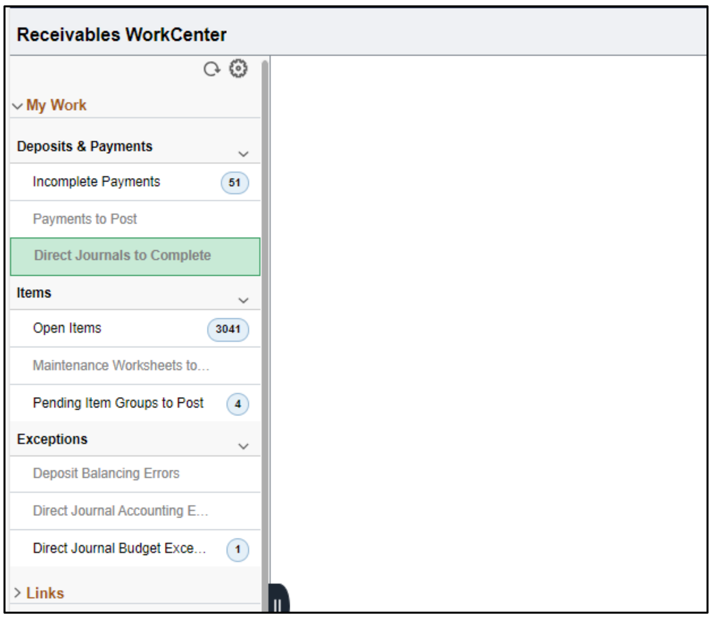
- ➢ To minimize the **Account Receivable WorkCenter**, click the **Minimize** button located in the middle of the left-hand **Navigation Bar**.



➢ **My Work**.

The **My Work** dropdown includes links to pages that an end user would need to access daily. Additionally, it can include exceptions and alters, where the user must take action.

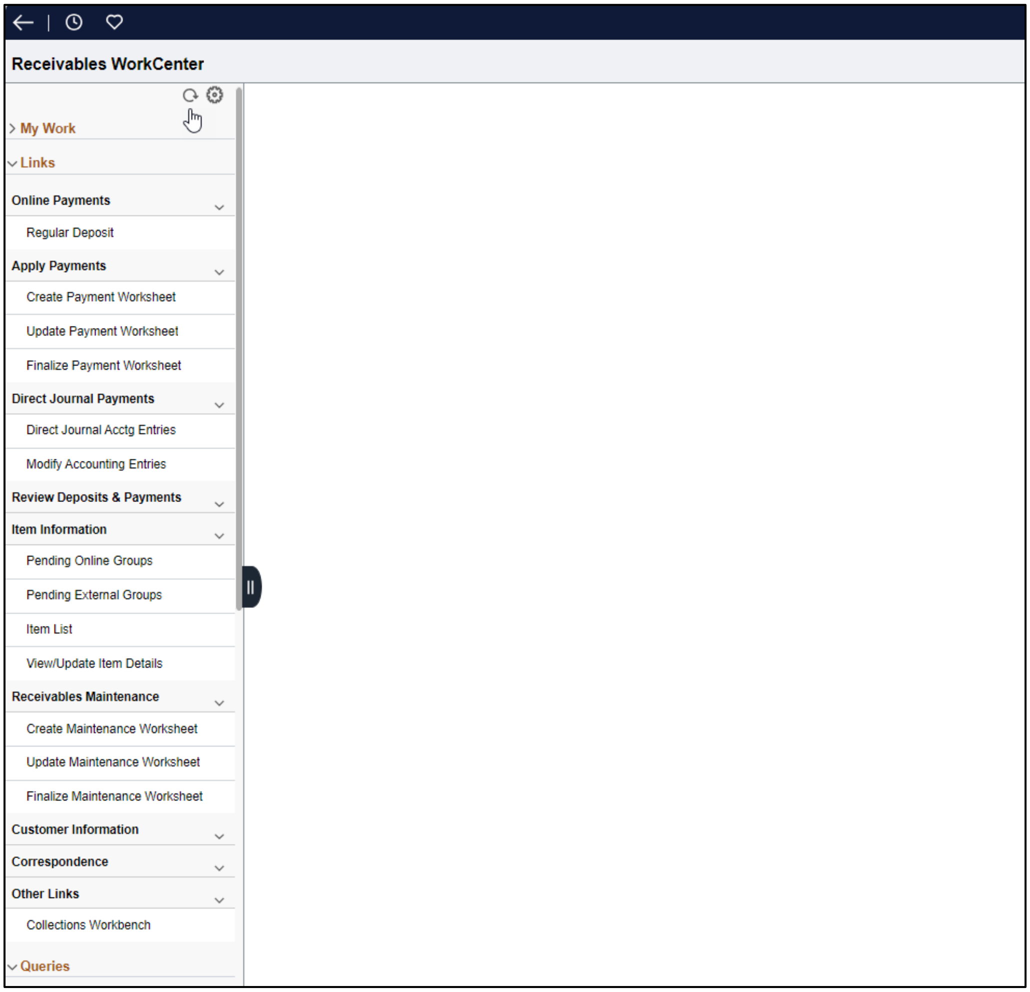
➢ **Deposits & Payments**, **Items**, **and Exceptions**.



➢ **Links**.

The **Links** dropdown includes additional links to pages, or other areas of interest, for the user.

➢ **Online Payments**, **Apply Payments**, **Direct Journal Payments**, **Review Deposits & Payments**, **Item Information**, **Receivables Maintenance**, **Customer Information**, **Correspondence**, and **Other Links**.

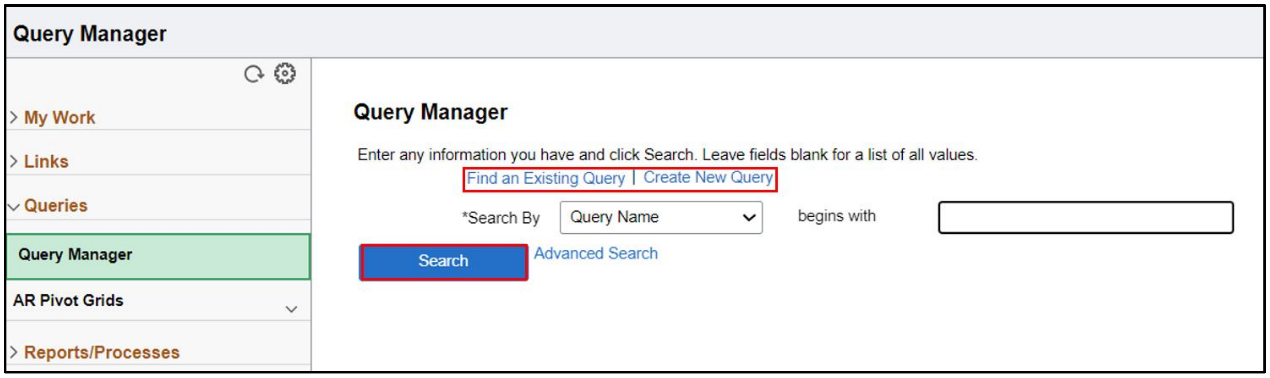


➢ **Queries**.

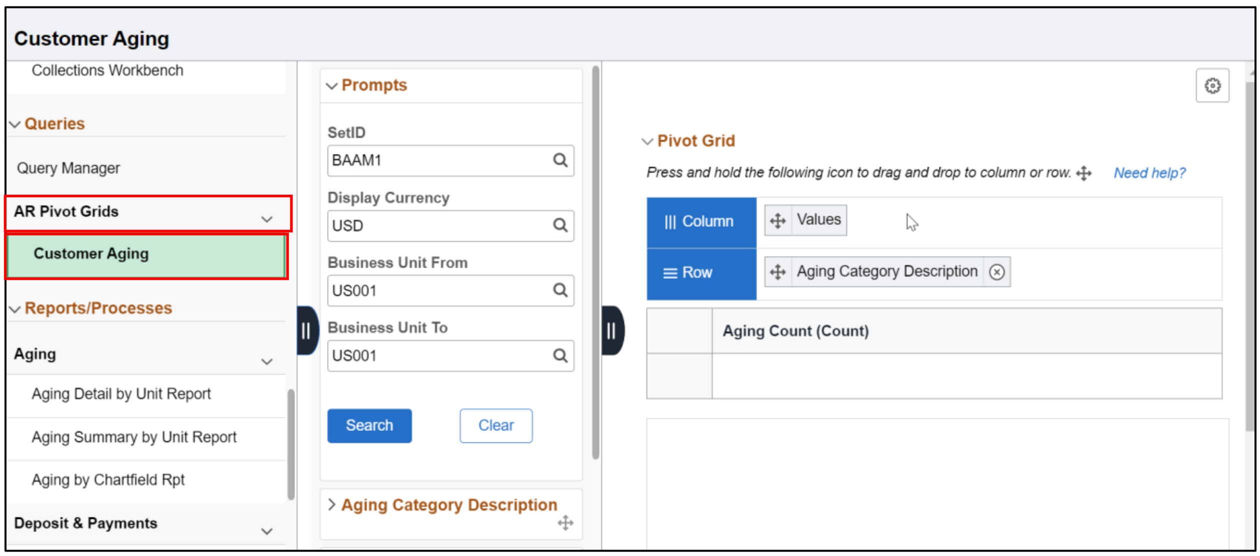
The **Queries** section includes links to **Query Manager**, public and private queries, and pivot grids

➢ **Query Manager**.
- Using the **Search** function, users can pull up existing queries.
- Users may also click the **Create New Query** instead of the **Find an Existing Query** link. – Note: Only Central agency users can add their favorite queries to their Query manager. This functionality is NOT for EPM Queries.

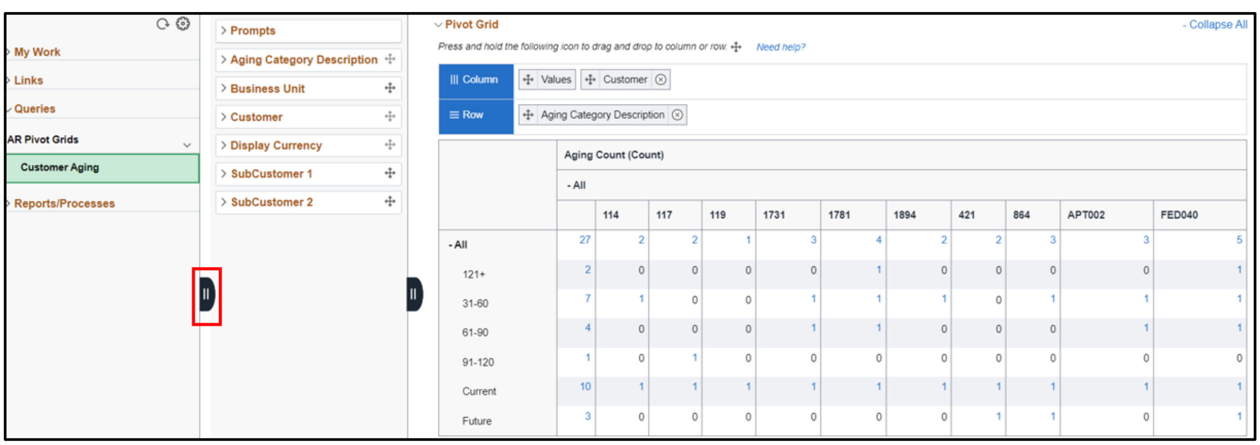
- Customer Aging.



a. Click **AR Pivot Grids**, then click **Customer Aging**.



b. Click the **Minimize** button.

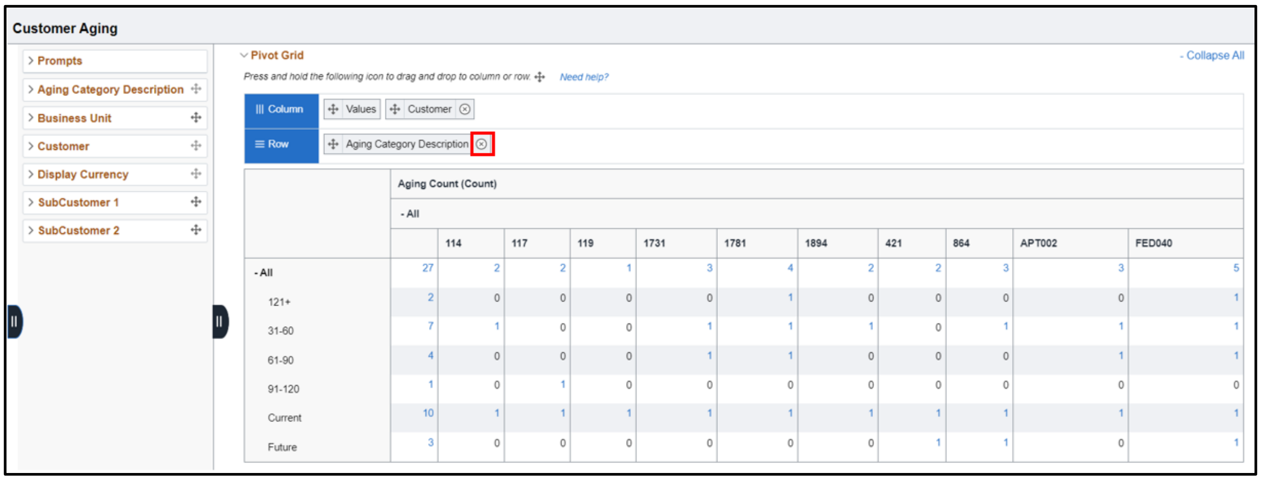


Pivot grids are data visualization tools used to summarize, analyze, and present large datasets in a structured format. They allow users to dynamically rearrange and aggregate data along different dimensions, such as rows, columns, and layers, to gain insights and identify patterns within the dataset.

This **Pivot Grid** is demonstrating the **Aging Category Description** between various **Customers**.

To change the values, drag and drop data values into the **Rows** and **Columns**.

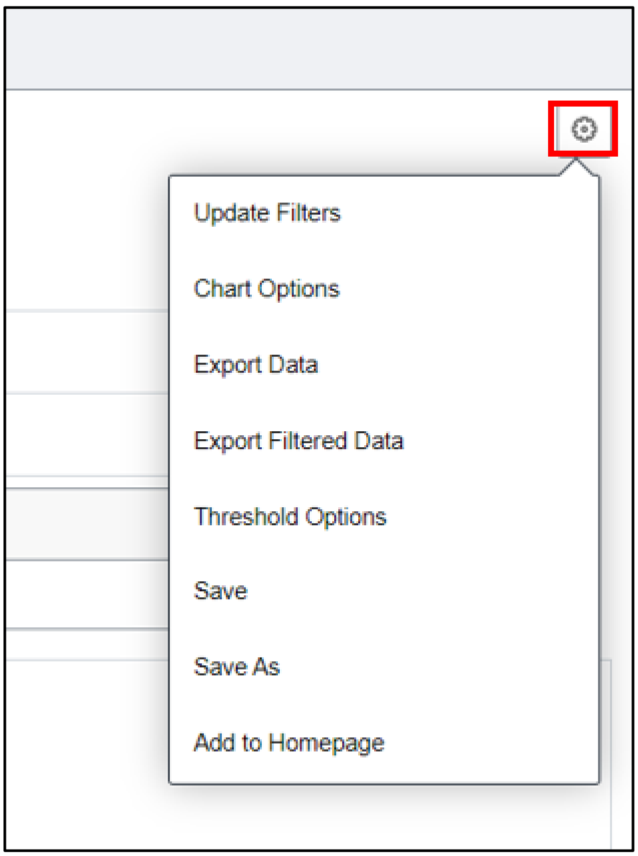
c. Delete **Aging Category Description** from rows.



d. Drag and drop **Business Unit** into rows.

Now the pivot grid demonstrates the Customer depending on the Business Unit.

- Select the settings to reveal additional menu options:
- **Update Filters**
- **Chart Options**
- **Export Data**
- **Export Filtered Data**
- **Threshold Options**
- **Save**
- **Save as**
- **Add to Homepage**



e. Expand the left-hand navigation pane.

- ➢ Expand **Reports/Processes**.

The **Reports/Processes** dropdown stores different reports and processes users may need to perform daily.

- ➢ Expand **Aging**, **Deposit & Payments**, **Correspondence**, and **Monitor**.