Accounts Receivable WorkCenter

In Core-CT 9.2, Accounts Receivable features a new WorkCenter. This job aid walks users through the basic functionalities of these enhancements.

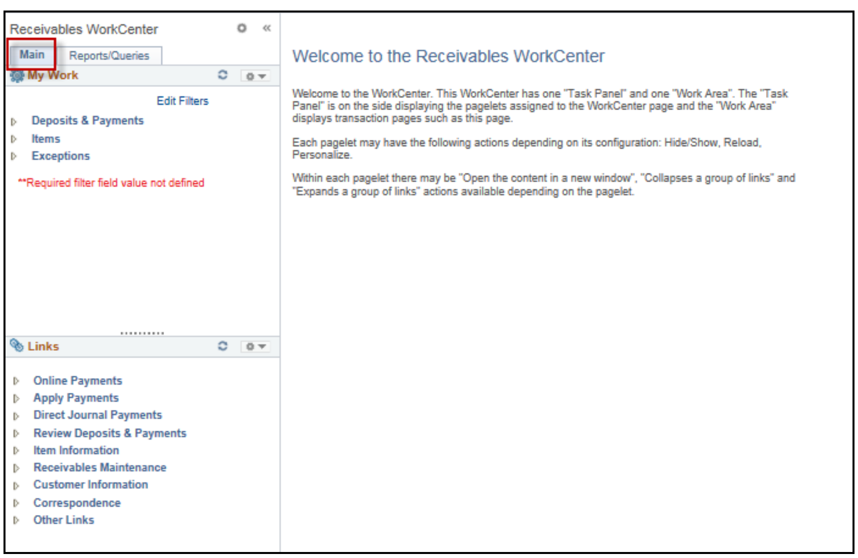
Accounts Receivable Workcenter

Navigation:

Accounts Receivable > Receivables WorkCenter

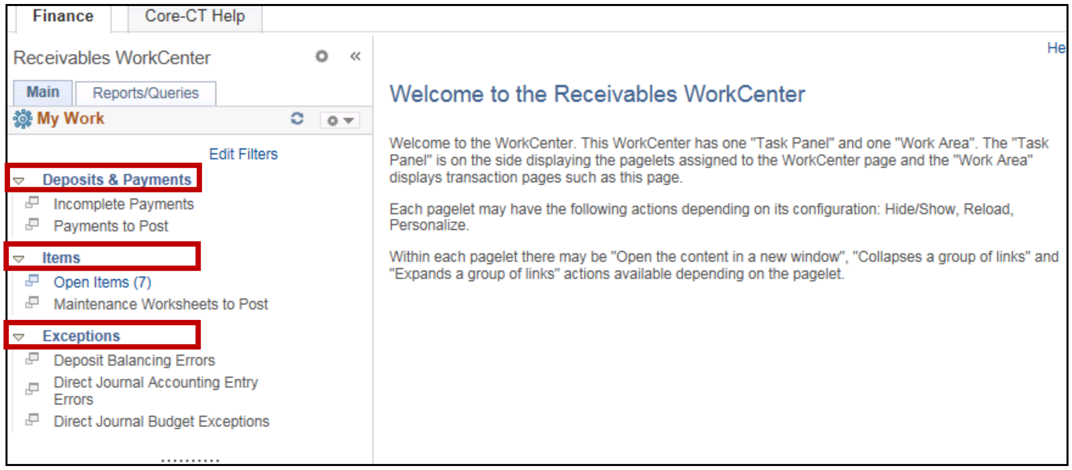
The Accounts Receivable WorkCenter is designed to be a navigational center for end users. The WorkCenter helps end users become more efficient by accessing frequently used pages and pagelets. WorkCenters are designed for specific roles and provide a singular location for access to key processes within Financial and Supply Chain applications. Users will be able to perform daily tasks without leaving the WorkCenter, which reduces time when navigating through menu items.

The **Main** tab contains the **My Work** and **Links** pagelets:



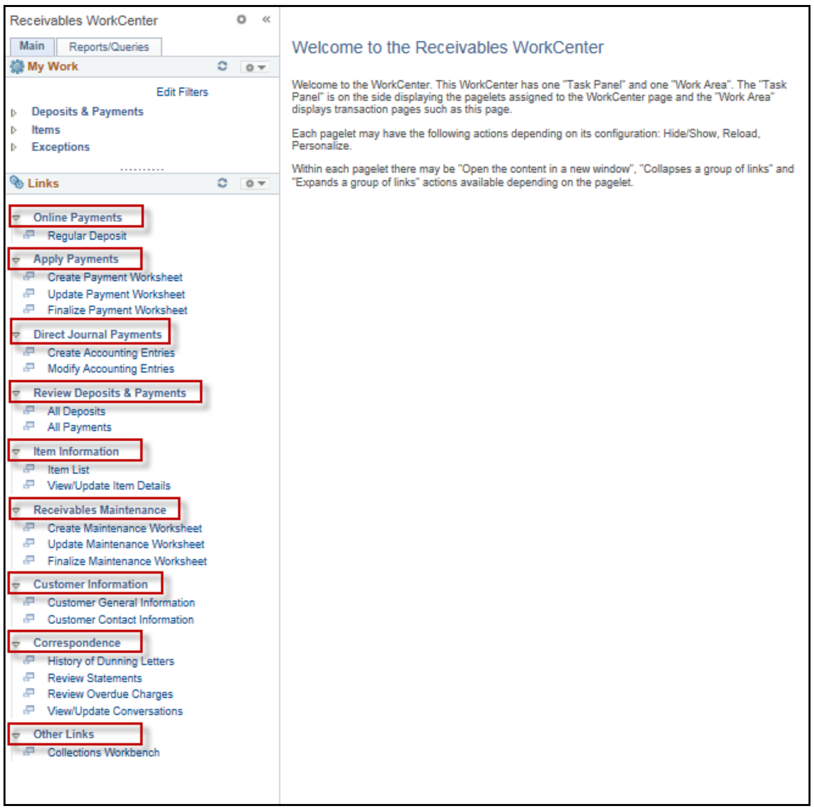
The **My Work** pagelet includes links to pages that an end user would need to access on a daily basis. Additionally, it can include exceptions and alters, where the user must take action. Note: *Users must use the **Edit Filters** feature to define the **My Work** drop down menus.*

1. Expand the **Deposits & Payments, Items, and Exceptions**



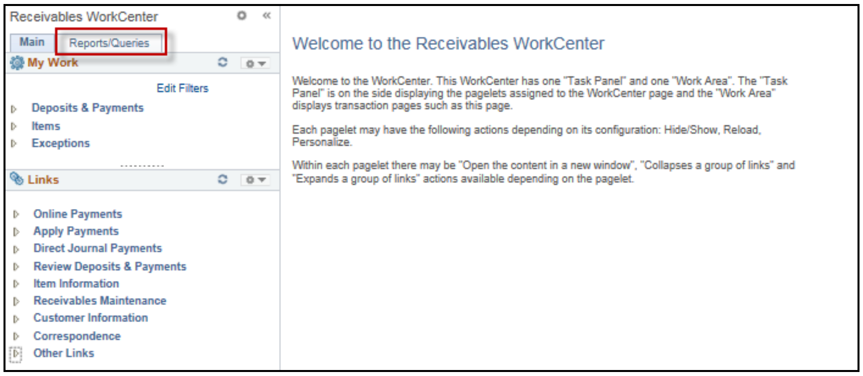
The **Links** pagelet includes additional links to pages, or other areas of interest, for the user.

2. Expand the **Online Payments, Apply Payments, Direct Journal Payments, Review Deposits & Payments, Item Information, Receivables Maintenance, Customer Information, Correspondence,** and **Other Links** drop downs

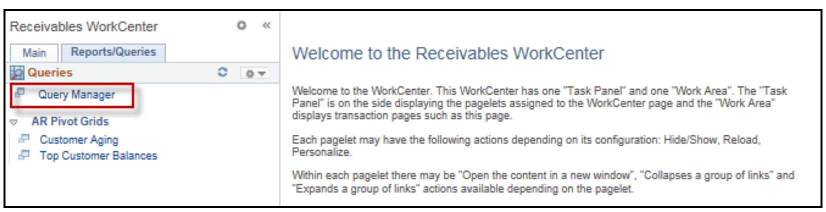


The **Reports / Queries** tab contains **Queries** and **Reports and Processes**. The **Queries** section includes links to Query Manager, public and private queries, and pivot grids. Note:

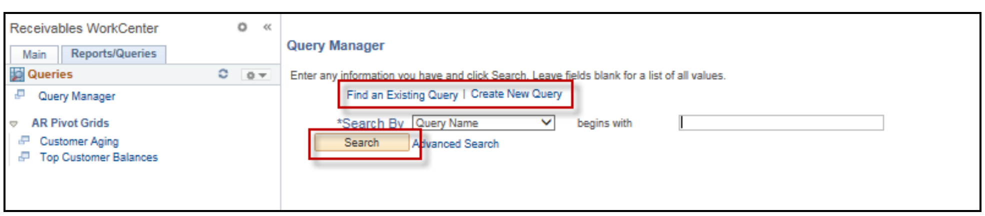
3. Click the **Reports / Queries** tab



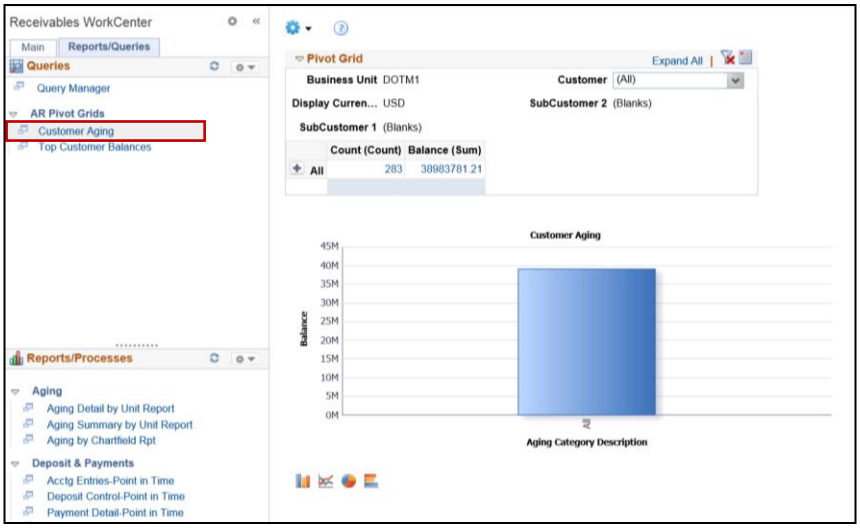
4. Click the **Query Manager** link



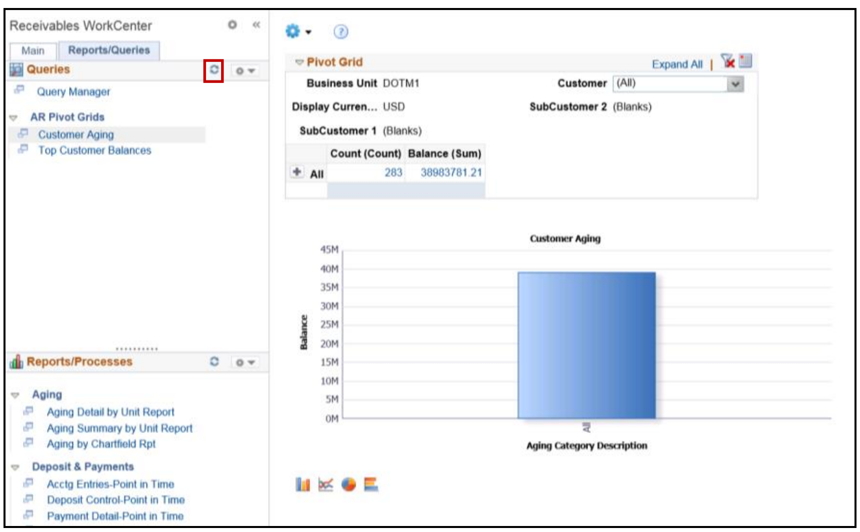
5. Using the **Search** function, users can pull up existing queries
6. Users may also click the **Create New Query** instead of the **Find an Existing Query** link



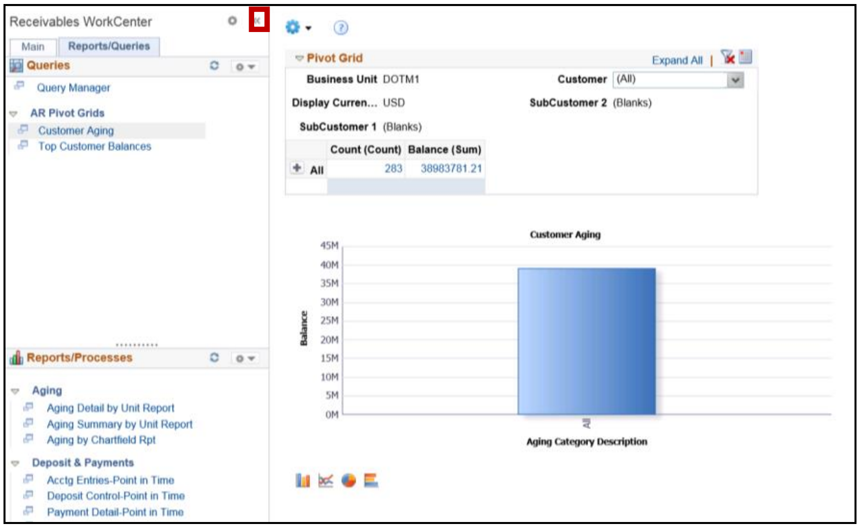
7. Click **Customer Aging** link.



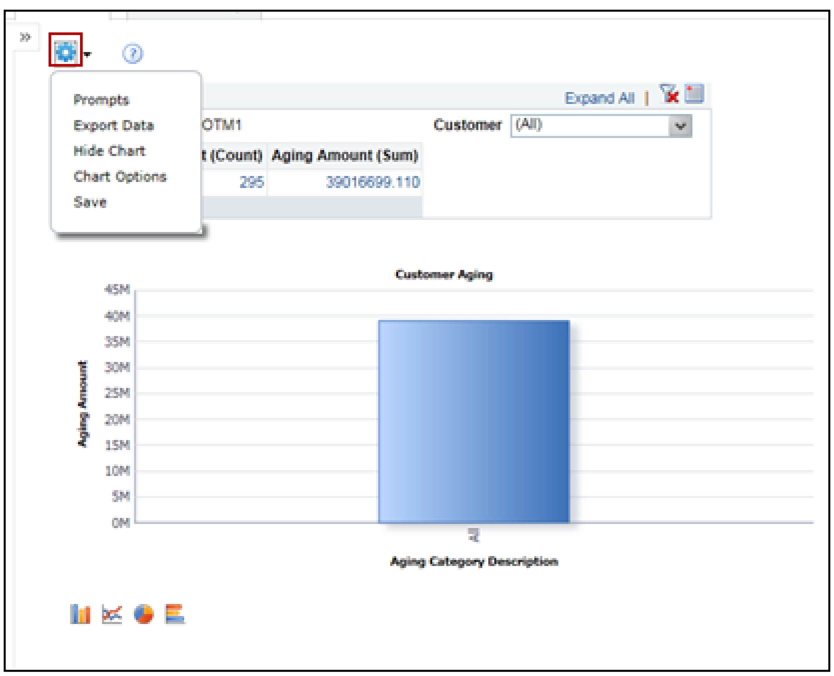
8. To refresh the page, click the **Refresh** button located in the upper right corner of the **Queries** pagelet**.**



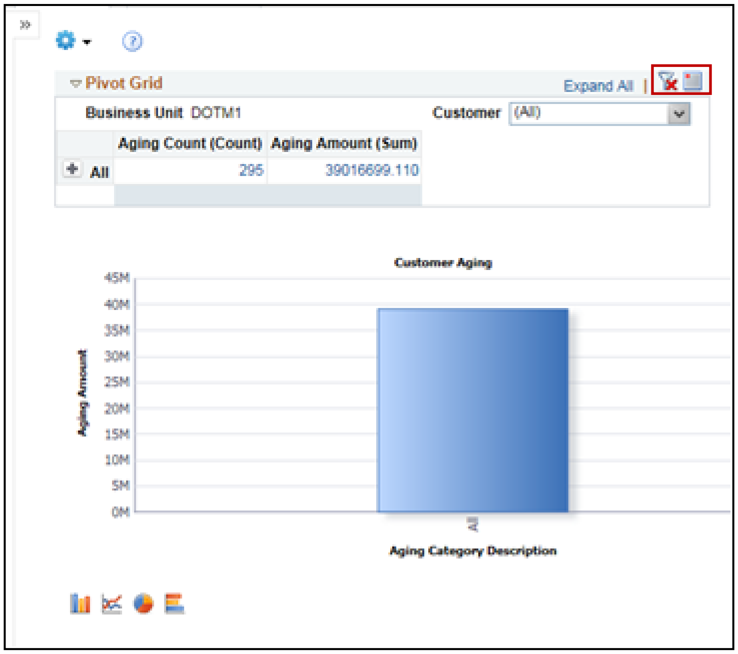
9. To minimize the **Receivables WorkCenter**, click the **Minimize** button located in the upper right corner of the pagelet (to the right of the **Refresh** button).



10. Select the **Cog** to reveal additional menu options:
    a. **Prompts**
    b. **Export Data**
    c. **Hide Chart**
    d. **Chart Options**
    e. **Save**

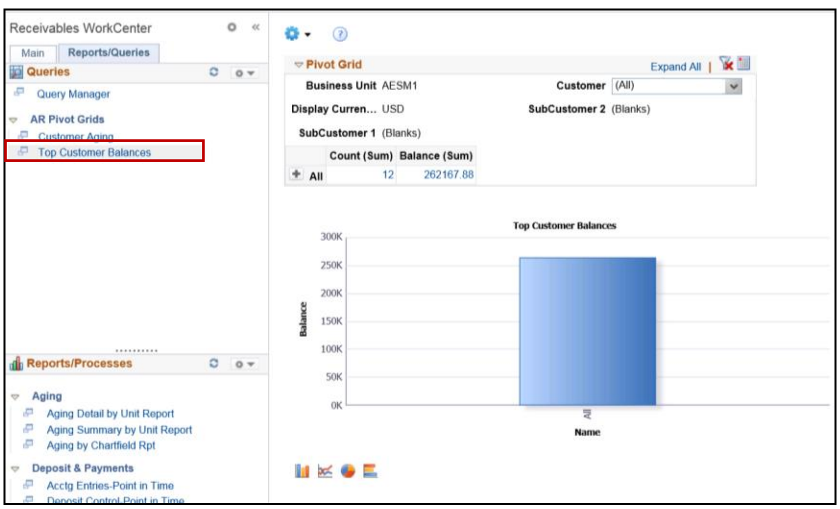


11. In the upper right hand corner of the **Pivot Grid** tab, click the **Hide Filter** icon (funnel with a red "X") to collapse the filters. In the upper right hand corner of the **Pivot Grid** tab, click the **Download** icon (located to the right of the **Hide Filters** icon) to **Download** the chart.



12. Click the **Bar Chart, Line Chart, Pie Chart,** or **Horizontal Bar Chart** icons in the bottom left corner of pagelet to change the graphical representation of the data.

13. Click **Top Customer Balances**



The **Reports and Processes** section includes links that take you to the run control page for reports, processes, and the Reporting Console.

14. Expand the **Aging, Deposit & Payments, Correspondence,** and **Monitor** drop downs