A. System wide changes
- Color scheme is slightly different.
- Larger Font Size
- There is a new icon view that may be used to navigate besides the menu. (IMAGE A)
- The flashlight icon used in certain areas is now replaced with a search button. (IMAGE A)
- The Dilbert head for conversations is now replaced with the blue hyperlink “Add a Conversation”.

B. Customer Setup
- Navigation: Unchanged
- General Info Tab: Now contains the support code, currency code, and address fields. (Image 1)
  - The short name field no longer auto populates. The short name must be entered manually.
  - Go To Menu is now called General Info Links. New link added to the drop down menu called “Contact Info” which opens a new window so that a contact may be added for the customer.
- Bill to Options Tab: Now contains the Payment Options screen. (Image 2)
  - New field called “AR Specialist” – Not used by USF at this time.
- Ship To Options Tab: No changes concerning business processes here at USF.
- Sold To Options Tab: No changes concerning business processes here at USF.
- Address Tab: The address fields are now on the General Info Tab.
- Miscellaneous General Info Tab: The support codes and currency codes sections is now on the General Info Tab. (Image 3)
  - New feature shows the last user that created/updated customer.
The following screen captures show the new look for customers:

General Info Tab (Image 1):

- **Currency Code:** USD
- **Rate Type:** CURRENT

Short name must now be entered manually.
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Bill To Options Tab (Image 2):
C. Customer Contacts

- Navigation: Unchanged
- New hyper link called “Staffing Information” This will not be used.

D. Customer Conversations

- Navigation: Link now says “Update Conversations” instead of “Conversations”
- Find an Existing Value Tab: Contains additional search parameters. (Image 4)
- Add a New Value Tab: No longer contains the date and time field.
- Tabs Changed: New tabs - References and Attachments; Deleted Tabs – Conversation Details and Conversation Action/Keywords. (Image 5).
- Conversations Tab: Now contains Conversation Subject, Topic, Sub Topic, Review, Follow up, Reference Amount, and Keyword fields. (Image 6)
- Reference Tab: Used to reference a specific Item to the Conversation.
- Attachments Tab: Not used by USF.
Conversations Find an Existing Value Tab (Image 4):

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

Conversations Tab (Image 5):

Conversations Entries

Conversations | References | Attachments
E. Bill Entry

- Navigation: Unchanged
- Functionality Changes: None

F. Generate Invoices

- Navigation: Unchanged
- Functionality Changes: None

G. Locate Bills

- Navigation: Unchanged
- Functionality Changes: None

H. Reviewing Billing Information

- Navigation: Unchanged
- Functionality Changes: None

I. Account Overview

- Navigation: Changed
- New Navigation: Accounts Receivable/Customer Accounts/ Customer Information/Account Overview
- Items Tab is no longer an option. To review item details for a customer, use either the Balance Link or Past Due Link. (Image 7a and 7b on next page) There are also new links labeled: Collections, High Balances YTD, Sales YTD, Last Year Sales. The icon is replaced with a blue hyperlink.
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Account Overview (Image 7a)

Item List (Image 7b)
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**J. Payments**
- Navigation: Changed.
- New Navigation: Accounts Receivable/Customer Accounts/ Customer Information/Account Overview
- Functionality Changes: None

**K. Item Activity**
- Navigation: Changed
- New Navigation: Accounts Receivable/ Customer Accounts/ Item Information/View-Update Item Details.
- The Item activity link is now a tab on the View-Update Item Details Page. (Image 8)
- The Item Activity Tab now contains links that drill to “Item Activity From A Payment Page”.

### Item Activity (Image 8)

<table>
<thead>
<tr>
<th>Sequence</th>
<th>Item</th>
<th>Reason</th>
<th>Accounting Date</th>
<th>Posted Date</th>
<th>Voucher ID</th>
<th>Amount</th>
<th>Unit ID</th>
<th>Group ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>USF01</td>
<td>IN</td>
<td>03/24/2005</td>
<td>03/24/2005</td>
<td></td>
<td>72.00</td>
<td>USD</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>USF01</td>
<td>PY</td>
<td>04/25/2005</td>
<td>04/27/2005</td>
<td></td>
<td>72.00</td>
<td>USD</td>
<td></td>
</tr>
</tbody>
</table>

**Details: Item Activity**
- Save
- Return to Search
- Previous in List
- Next in List
- Notify
- Refresh

Detail 1 | Detail 2 | Detail 3 | Item Activity
FAST 8.9 Upgrade 2007
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L. Aging Report

- Navigation: Changed
- New Navigation: Accounts Receivable/ Receivables Analysis/ Aging/ Aging Detail by Unit RPT
- New Drop Down Menu: Options for running an Aging Report now include: Include All, Collections Only, Disputes Only, Deductions Only. (Image 9)

Aging Report (Image 9)
Aging Detail By Unit

M. Accounts Receivable/ View - Update Customer Conversations

- Navigation: Changed
- New Navigation: Accounts Receivable/ Customer Interactions/ Conversations
- Please see Changes in Conversations Section (D).

N. Review Payments

- Navigation: Unchanged
- Functionality Changes: None

O. Item Activity From Payment

- Navigation: Changed
- New Navigation: Accounts Receivable/ Receivables Update/ Posting Results – Payments/ Item Activity From Payment
- Functionality Changes: None
**P. New Way of Printing Invoices**

- An instance number will no longer be emailed in the morning.
- Please follow the new steps below to print invoices

**STEP 1** Navigate to the **Generate Invoices Component and Run the Reprint Invoices Process**

1.1 To print the invoice, select **Billing, Generate Invoices, Non-Consolidated, Reprint Invoices, “Find an Existing Value” tab**

![Diagram](https://via.placeholder.com/150)

**NOTE:** The Finalize and Print process produces a file of ALL printable invoices, for all customers across all departments. Using the Reprint Invoices function allows the user to select only their particular invoices for local printing, in an easier fashion than would be required in searching for specific invoices from the larger file produced by the night “batch” run.

1.2 For the Run Control ID field, enter “PRINTCRYSTAL”. Click on the **Search** button. This will generate the Reprint Invoices Run Control page.

**Reprint Invoices**

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

**Run Control “Find an Existing Value” page**
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NOTE: If clicking on the Search button results in the message "No matching values were found", enter the Run Control ID into the "Run Control ID" field and click on the "Add a New Value" tab. Click on the Add button to generate the Reprint Invoices Run Control page. Click the Save icon to save the Run Control ID for future use.

1.3 Enter the From and To Business Unit of USF01
1.4 Enter the From Invoice Number.
1.5 Enter the To Invoice Number. *May select multiple invoices at once.*
1.6 Click on the Run button. This will generate the Process Scheduler Request page for the Reprint Invoice job.
1.7 Accept the following defaults:
   • User ID (carried from the Search page)
   • Run Control ID (carried from the Criteria page)
1.8 Accept the default server name as blank, if it is not blank change it to such. Press the Tab-Key.
1.9 Accept the following defaults:
   • Recurrence: the field is blank
   • Time Zone: the field is blank
   • Run Date: system-generated
   • Run Time: system-generated
1.10 For the Process List – Select field, check the “USF Billing Invoice” row checkbox, indicating that this is the process that will be run. This box may already be checked.
1.11 Change the Type to Web, and the Format to PDF.

1.12 Click on the OK button to start the process for the generation of this Reprint Invoice job. This will return the user to the Run Control page for this process.

1.13 Click on the hyperlink for Process Monitor on the Run Control Page.

1.14 Continue reviewing the progress of the job by clicking the Refresh button. When the run status of the job = SUCCESS, the Invoice is ready to print from your local printer. Click the U_BIINV link
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**STEP 2** **VIEW/PRINT THE INVOICE**

2.1 Click on View Log/Trace hyperlink to pull up the U_BIPRNT list as illustrated below.

2.2 Click on View Log/Trace hyperlink to pull up the View Log/Trace link as illustrated below.
2.3 Click on the Report hyperlink (the U_BIPRINT PDF file hyperlink). This will generate an online view of the invoice. The invoice can be printed from within the online view. See the appendix for an example of an invoice.

NOTE: You can right click on the file to save the PDF file to your disk/hard drive. You can then rename the file to any name you choose.