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**Case: 197 Open New Invoice form up to Departments**

**ADMINISTRATION**

**New Default Roles**

New Decentralized user roles have been created.

- AR\_EXTERNAL\_SUPER\_USER: For assigned departments - can create, edit, and mark invoices as completed, and manage and reassign invoices for other decentralized users
- AR\_EXTERNAL: For assigned departments can create, edit, and mark own invoices as completed
- AR\_PRINT: Must be used with one of the decentralized EXTERNAL roles to gain access to print invoices

**INVOICE MENU**

**Invoice Page**

- Tabs on the page removed, you must now access the Print and Create Batch pages from the menu
- Access to departments now determined by roles
- Can attach documents to an invoice
- Can select different addresses for the customer
- Invoices can be marked as completed by a decentralized user to be printed by another user

**Batch Print**

- Added a Department filter
- Changed the datagrid list format

**Create Batch**

- Added a Department filter
- Changed the datagrid list format
- Added a Batch Summary PDF report - to review entire batch of invoices at a glance without having to view them individually
- Click the Invoice number to view and/or change accounting codes
- Now when re-editing/reactivating the invoice, an e-mail template opens than can be sent to advise the user it has been reactivated. The e-mail subject and body are configurable by the institution and can be edited by the user

**Reassign Invoices - New Page**

- Can reassign invoices to another user if it cannot be completed by the originator - as long as they are assigned the department on the invoice

**MAINTENANCE**

**Customers**

- Can now add multiple addresses for one customer
- Can now merge multiple/duplicate address entries in to one master customer, which will remove the old customer

**Customer Merge - New Page (Version 3.3)**

- Allows you to merge multiple customer addresses into one entry

**User/Department Assignment - New Page (Version 3.3)**

- Departments must be assigned to decentralized users so they can create, edit, complete, print, and/or reassign invoices.
- Must be a centralized user to assign department access.

**Periods**

- Centralized users can now set the fiscal periods that decentralized users can create invoices to.

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**REPORTING**

The role you are assigned determines the reports you see on the Reporting menu. The departments you are assigned determines the invoice data you see on the report.

**Case: 2684 First enabled accounting dropdown does not auto-popup**

On the Invoice form, in the Accounting section, in the first "enabled" search drop-down, the popup now appears when the user starts typing.

**Case: 3783 New page: Departmental Assignment**

Added a form to allow centralized AR users and administrators to grant department access to decentralized users. Decentralized users will need to have an AR ROLE granted to them before they appear on this form.

**Case: 3785 Reassign Invoice Form**

New form created to allow temporary assignment of invoicing responsibilities for External users.

**Case: 3786 Modify security access on reports**

See case 197, under REPORTING

**Case: 3787 New reporting page: Invoice Status**

On this new page, you can view the status of invoices and other information: In Progress, Approved, Printed, Posted, Created By, Assigned To, Amount, Payments, Balance.

An invoice is editable on this page however, you can open a PDF to view it. You also have the option to attach a file to an invoice.

**Case: 3788 Updates to Create Batch page**

See Case 197, under MAINTENANCE User/Dept Assignment.

**Case: 3790 Updates to Invoice Form**

- You can now attach a document to an invoice.
- For decentralized users, an option has been added to mark an invoice as complete.
- Department dropdown list restricted to assigned departments.

**Case: 3866 Create new page to allow easy address merges**

Background:

Previous to version 3.2, you had to create a customer record for each address that customer had. Now for version 3.3, you can add multiple addresses for one customer record.

A step by step process merges multiple customer address records into one master record. You can choose which record you want for the master record and merge the other address records into it.

**Case: 3940 Maintenance - Defaults - Numeric Value field data type**

Text box now only accepts numeric characters.

**Case: 3948 Batch History - Display issues**

Display issues fixed. Column is now the correct width.

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**Case: 4012 Bad Debt Provision - OSX security warning on post to Banner PDF**

OSX warning no longer displays and PDF opens as expected.

**Case: 4044 Invoice By Date - Menu list is not sorted by date**

Now sorted by Date

**Case: 4053 ATB - Customer not running**

Report would not run if a customer had a negative balance. This issue has been resolved.

**Case: 4167 Modify Batch Print page to allow External User access**

See case 197, under ADMINISTRATION, New user roles - AR\_PRINT

**Case: 4223 Print Batch - PDFs are blank**

PDF now displays data.