



Business Process Document
PS FIN Grants Suite Inquiries and Reports:
View/Update Item Details

Department	
Responsibility/Role	
File Name	View_Update Item Details_BUSPROC.doc
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Status	

View/Update Item Details

Trigger:

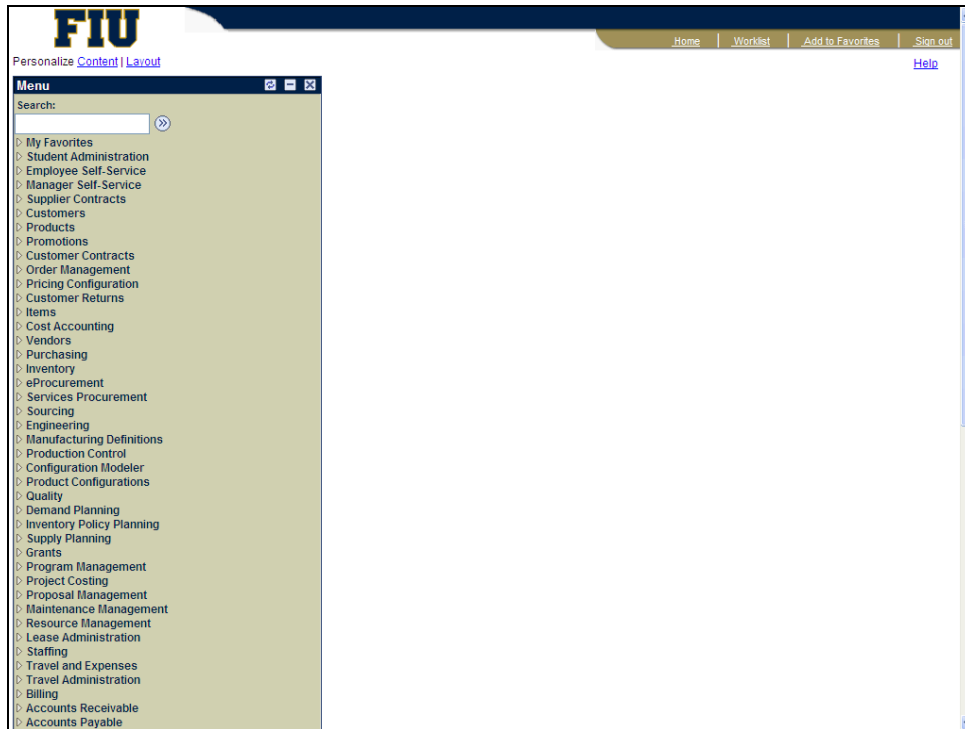
Required Field(s)	Comments

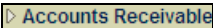
Output - Results	Comments

Additional Information

Procedure

The **View/Update Item Details Inquiry** allows users to change details for individual items including any activities, accounting entries, and/or VAT lines for an item. It also allows users to view and assign actions to an item.



Step	Action
1.	Click the Vertical scrollbar.
2.	Click the Accounts Receivable link. 



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Step	Action
3.	Click the Customer Accounts link. <input type="text" value="▶ Customer Accounts"/>
4.	Click the Item Information link. <input type="text" value="▶ Item Information"/>
5.	Click the View/Update Item Details link. <input type="text" value="View/Update Item Details"/>

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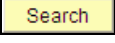
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The screenshot shows the 'View/Update Item Details' page in the FIU system. The left-hand menu lists various options under 'Item Information' and other categories. The main content area contains a search form with the following fields:

- Business Unit: = [FIU01]
- Customer ID: begins with []
- Item ID: begins with []
- Item Line: = []
- Item Status: = []
- Credit Analyst: begins with []
- Collector: begins with []
- Purchase Order Reference: begins with []
- Document ID: begins with []
- Bill of Lading: begins with []

At the bottom of the form, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A 'Case Sensitive' checkbox is also present.

Step	Action
6.	Click the Look up Business Unit (Alt+5) button. 
7.	Click " FSR01 " link found in the Business Unit column. 
8.	Click in the Item ID field. 
9.	Enter the Invoice number that you wish to work with into the Item field . For example, enter " SP-0000669 ".
10.	Click the Search button. 
11.	Note: This page displays the outstanding Balance as well as some basic information in regards to Discount Options, Payment/Draft Options, and Customer Relations details such as the Analyst, Collector, and Sales Person.



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Step	Action
12.	Click the Item Activity tab. Item Activity
13.	Note: This page displays the Invoice amount, the date that the invoice was sent, payments received, date of payment received, and the current balance.
14.	Invoice Amount
15.	Payment Received
16.	This is the Balance

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Step	Action
17.	Click the Home link.
18.	Congratulations. You successfully ran a View/Update Item Details Inquiry. End of Procedure.