

## AR.010.005 – AR USER PREFERENCES

<b>Purpose</b>	<ul style="list-style-type: none"> <li>Learn how to navigate the Accounts Receivable User Preferences pages.</li> <li>Learn how to assign user preferences to a specific Business Unit.</li> <li>Learn how to enter a Max Write Off amount as a user preference</li> </ul>
<b>Description</b>	This topic demonstrates how to set up User Preferences for Accounts Receivable. User Preferences define what a user is allowed and not allowed to do in the system.
<b>Security Role</b>	<b>BOR_LOCAL_SEC_ADMIN</b>
<b>Dependencies/ Constraints</b>	None
<b>Additional Information</b>	None

## Procedure

Below are step by step instructions on how users will establish User Preferences in Accounts Receivable using Business Unit 98000, an As Of Date of 01/01/1900, and a Max Write Off of \$99. Let's see how you would do this.

Step	Action
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Menu</b> icon.
3.	Click the <b>Set Up Financials/Supply Chain</b> link.
4.	Click the <b>Common Definitions</b> link.
5.	Click the <b>User Preferences</b> link.
6.	Click the <b>Define User Preferences</b> link.
7.	Enter the <b>User ID</b> for which you would like to set his/her User Preferences. You can either enter the value directly in the open field, or use the search prompt to identify the correct User ID.
8.	Click the <b>Search</b> button.
9.	Click the <b>Overall Preference</b> link.
10.	Enter your Business Unit in the <b>Business Unit</b> field.
11.	Enter your SetID in the <b>SetID</b> field.
12.	Enter " <b>01/01/1901</b> " in the <b>As of Date</b> field.  <i><b>NOTE:</b> Because many values in the PeopleSoft system are set to 01/01/1901, we recommend using this value so that your user will not be limited by date within the application.</i>
13.	Click the <b>User Preferences</b> tab.
14.	Click the <b>Receivables Data Entry 1</b> link.
15.	Enter your Business Unit in the <b>Group Unit</b> field.
16.	Enter your Business Unit in the Deposit Unit field.
17.	Enter " <b>USA</b> " in the <b>Country</b> field.  <i><b>Note:</b> The address fields on this page are optional and are used to store an address for follow-up letters. The address information that you enter on this page is not validated against any table.</i>
18.	Click the <b>Save</b> button so that the Address fields will display.
19.	Click the <b>User Preferences</b> tab.
20.	Click the <b>Receivables Data Entry 2</b> link.

Step	Action
21.	<p>The <b>Receivables Data Entry 2</b> page is used to define the write-off capabilities for the user.</p> <p>For GeorgiaFIRST institutions, the <b>Max Write Off</b> is the only field that you will need to populate on this page. The other fields are optional.</p>
22.	<p>In the <b>Max Write Off</b> field, enter the maximum amount that the user can write off for either an individual item or for the remaining balance for a normal group or match group. The user can write off an amount below the maximum amount as long as it does not exceed the percentage of the original amount for the item.</p> <p>For example, if you enter an amount of 25.00, the user can write off amounts up to 25.00. However, if you enter a maximum write-off percentage of 10 percent, and the total original amount of a item is 240.00, the user cannot write off more than 24.00.</p> <p>For no limit, enter all 9s.</p> <p>For this exercise, enter "<b>99.99</b>" in the <b>Max Write Off</b> field.</p>
23.	Click the <b>Save</b> button.
24.	Click the <b>User Preferences</b> tab.
25.	Click the <b>Process Group</b> link.
26.	<b>Process Groups</b> specify, by source transaction, the process groups a user can use for on-demand processing.
27.	<p>Both the <b>Allow Processing</b> and the <b>Use Event Notification</b> checkboxes should be enabled.</p> <p>The <b>Allow Processing</b> check box allows on-demand processing for this user ID.</p> <p>The <b>Event Notification</b> box allows the system to run processes in asynchronous mode, such that the processes run independently in the background and no response is required from the server.</p>
28.	The Process Groups should automatically appear for this user. You should not need to make any updates to the process groups on this page.
29.	Click the <b>vertical</b> scrollbar to navigate to the bottom of the page.
30.	Click the <b>Save</b> button.
31.	Click the <b>User Preferences</b> tab to return to the main page.