



This section provides an overview of the enhancements related to the Accounts Receivable module resulting from the upgrade to Core-CT 9.1. Each of the enhancements described in this section is covered in additional detail in the remaining sections of this course.

### **Conversations**

One new feature is available on the conversation pages:

- Ability to spellcheck conversation entries

### **Attachments**

Core-CT 9.1 enables users to attach documents to receivable payments and worksheets using an Attachment link. Attachments are associated with payments and remain in Core-CT 9.1 after a worksheet is no longer available to view. Adding attachments to payments and worksheets is similar to adding attachments to an email. This new feature of Core-CT 9.1 is available in other modules also.

The following file types can be attached:

- Microsoft Word Documents
- Microsoft Excel Files
- JPEG
- PDF

### **Payment Worksheets**

Core-CT 9.1 provides several enhancements to the Payment Worksheet. Users are now able to

- Sort items that appear in the Item List grid
- Use an expanded list of options in the **Choice** field in the **Row Selection Group** box
- Add, update, or delete dispute information for an item from a **Payment Worksheet**. Core-CT 8.9 displayed dispute information in view only mode on a **Payment Worksheet**. This information could not be modified on the **Payment Worksheet**. Only the dispute reason was displayed, not the dispute date or dispute amount.

### **Audit Logs**

In Core-CT 9.1 information from receivable transactions is captured and stored in an Audit Log file. Users can access this information by using a View Audit Logs link that appears on several pages in the Accounts Receivable module:

- **Totals** page
- **Payments** page
- **Detail 1** tab for an Item selected from the Item List page
- **Group** Control tab in the Group Entry component

The information captured in the Audit Log File varies with the transaction that was audited.

### **XML Reports**

In the Core-CT 9.1 Accounts Receivable module many reports will be generated as XML Reports. The jobs that users selected in Core-CT 8.9 to run reports have been supplemented by jobs that run XML reports. The navigation to run these reports in Core-CT 9.1 is the same navigation used in to run them in Core-CT 8.9.

The pdf files for XML reports cannot be viewed from the View Log/Trace page. Users must use Report Manager to view these files.

A list of the reports affected by this change is provided in the XML section of this course.