OMNI AR/Billing: Creating Products

Detailed Business Process Guides –APRODUCT1

About this Business Process Guide

There are two types of "product" data fields that can be used to standardize billing entry by defining name, price, unit of measure, and other standard fields for goods/services sold. In Billing, the system uses "Chargecodes," and in Contracts, the system uses "Products." They serve essentially the same functions, but exist in two different places and PeopleSoft does not connect them as delivered.

However, FSU has created a system modification (customization) that updates Chargecodes whenever a change is made to a Product or a Product is added so long as the below steps are followed. The Chargecodes are updated whenever the "Assign Price List" Save button is pressed by a user updating or adding a product. ***No other Save button in the "Identify Product Details" are will update the associated Chargecode – only the "Assign Price List" save button will do this.***

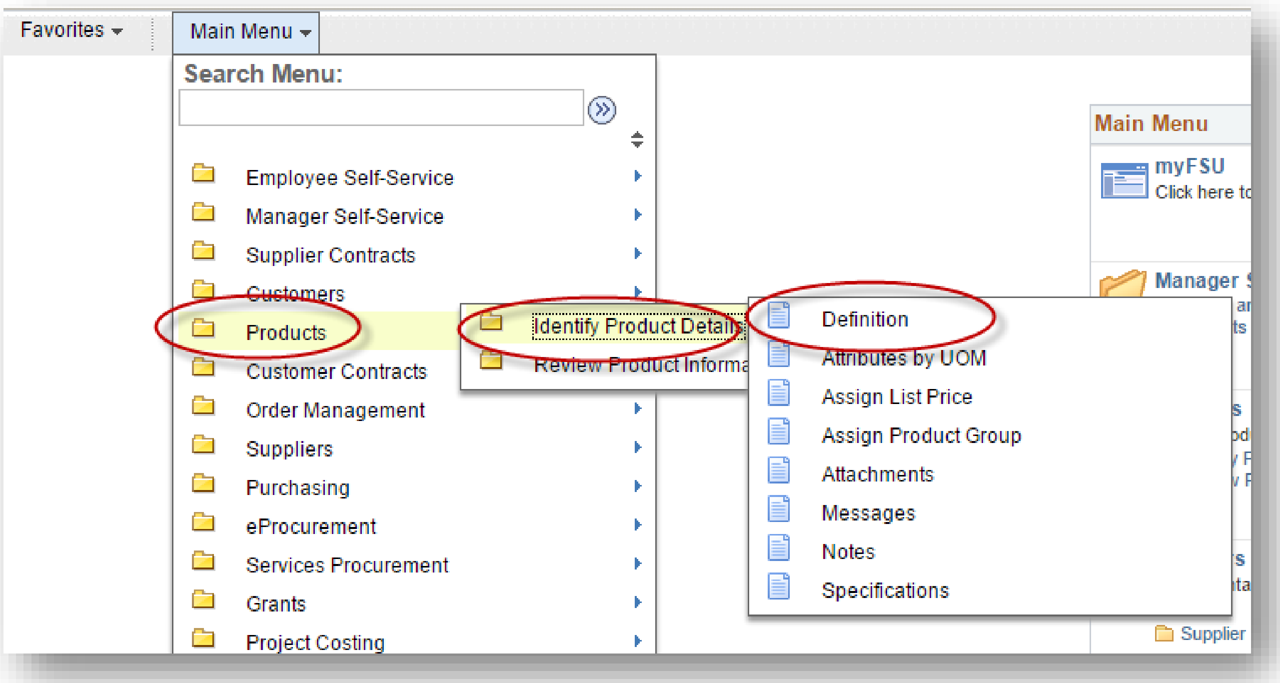
Due to this customization, changes/additions only need to be made to Products*, and this business process guide covers the required steps to create or modify a product.

*One possible exception is the association of revenue distribution codes with a product. If you have a need or would benefit from having a one-to-one relationship between a product and a revenue distribution code, please contact *ctl-auxiliaryaccounting@fsu.edu* and we will investigate your options. Most users have found so far that products are interchangeable between internal and external users, but if you charge different rates to different types of users (sponsored, external, internal customers), you may benefit from associating revenue distribution codes

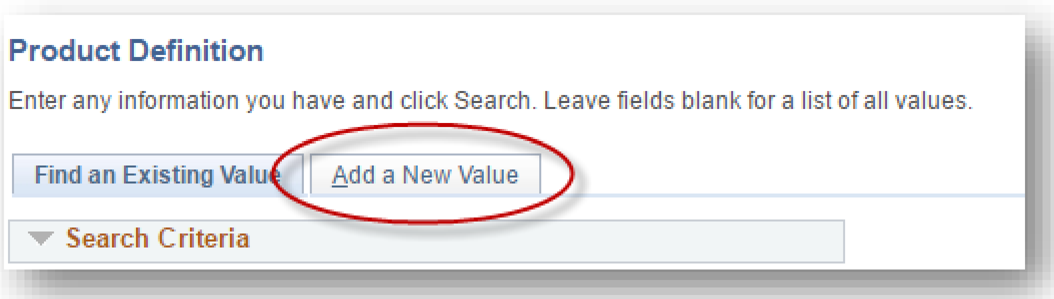
Creating Products

Before creating a product, first verify it does not already exist by reviewing the query FSU_AUX_PRODUCT_INFO.

Main Menu > Products > Identify Product Details > Definition



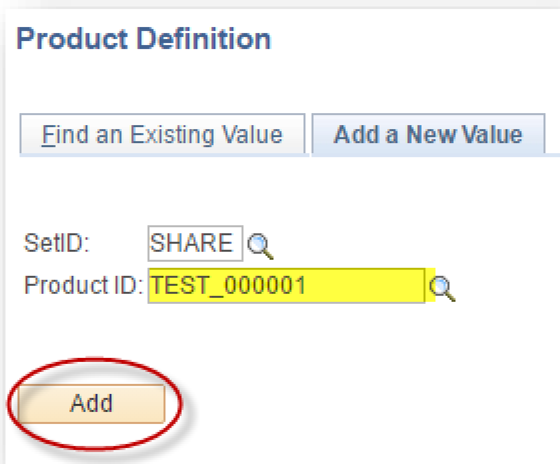
1. Click on the "Add a New Value" tab



2. Assign a Product ID
    a. Do not leave this as "NEXT"

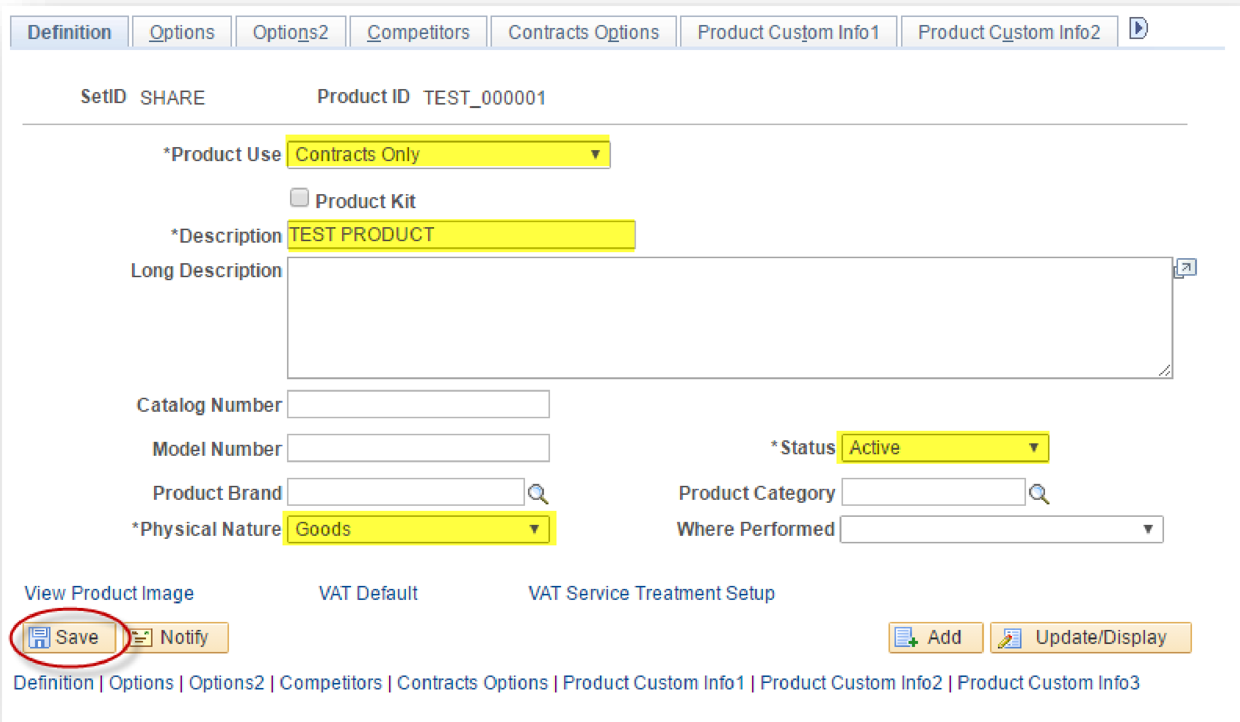
   b. You can use any ID that has not been previously used (a warning message will display if a product ID has already been taken

3. Click the "Add" button

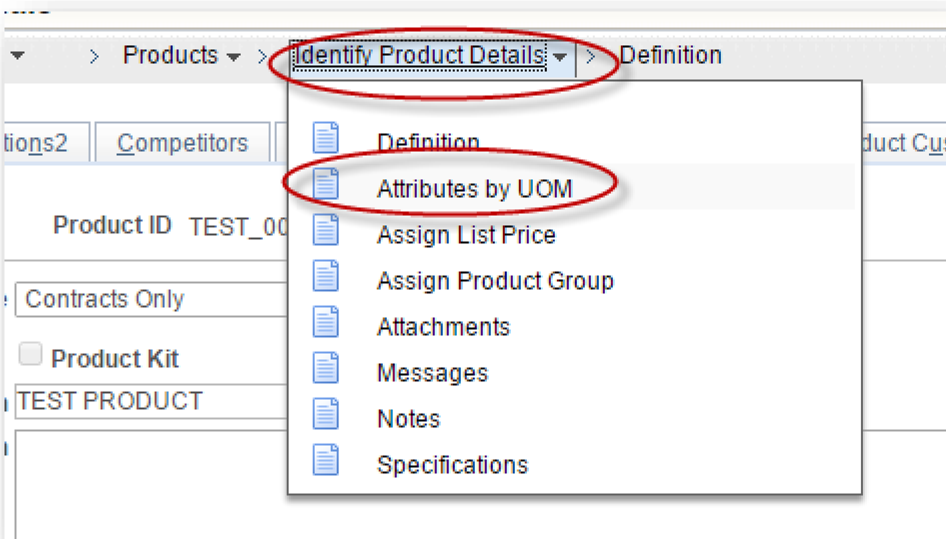


4. Required Fields
   a. Product Use: Contracts Only
      i. Use this for all products
   b. Description: *user generated*
      i. Capped at 30 characters. Longer descriptions can go in the "Long Description" field
   c. Physical Nature: Goods/Services
   d. Status: Active

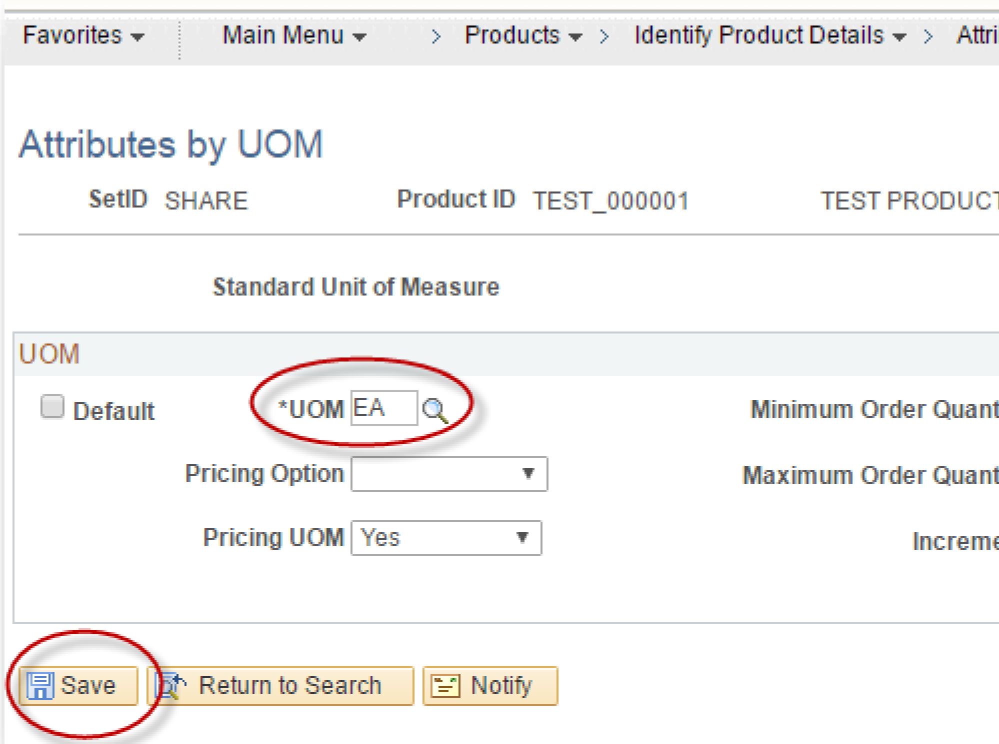
5. After completing all of the required fields, click on the "Save" button



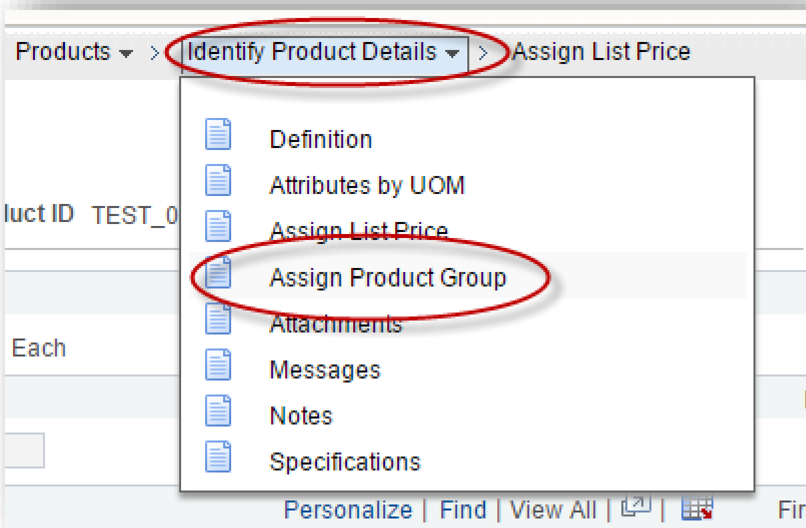
6. Assign a Unit of Measure
   a. All Units of Measure MUST be set to EA
   b. From the Definition screen, click on "Identify Product Details"
   c. Click on "Attributes by UOM"



d. Set “UOM” to “EA”
e. Click Save

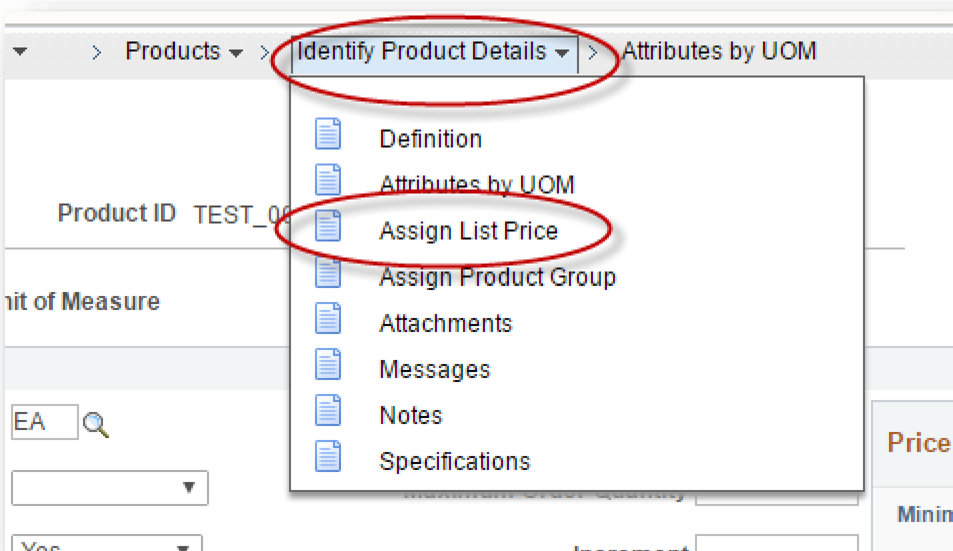


7. Assign the Product Group
   a. From the Assign List Price screen, click on Identify Product Details
   b. Click on Assign Product Group **do not skip this step**



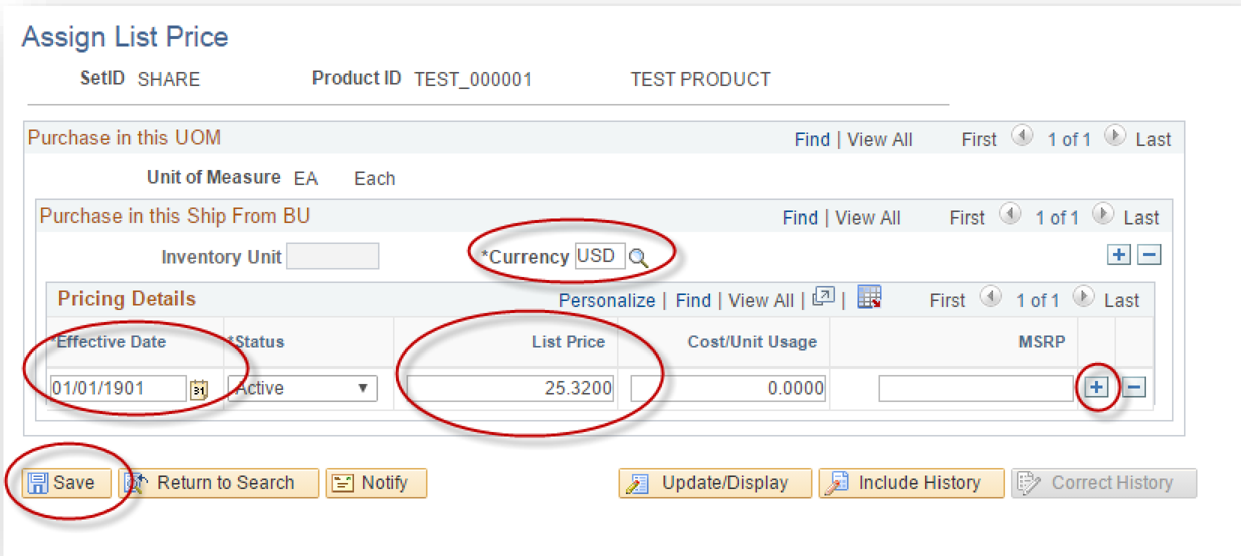
c. Required Fields:
   i. Group Type: Contract
   ii. Product Group: click on the magnifying glass and select the appropriate group
   iii. Click Save

8. Assign the List Price
   a. From the Attributes by UOM screen, click on Identify Product Details
   b. Click on Assign List Price



c. Required Fields:
   i. Currency: USD
   ii. List Price: *user entered*

iii. Effective Date: if you are creating a product, set the date to 1/1/1901; if you are modifying a product, click the plus icon in the "Pricing Details" area and set the effective date to the current date (or earlier if you need the new pricing details to be reflected on billable activity from earlier in the month)



d. Click **Save**.

1. The Chargecodes are updated whenever the "Assign Price List" Save button is pressed by a user updating or adding a product. ***IMPORTANT*: *No other Save button in the "Identify Product Details" are will update the associated Chargecode – only the "Assign Price List" save button will do this. Ensure this step is the last step taken when you add your product.***
2. You may now navigate to the Billing module to access the Chargecode.

Modifying a Product

Before modifying a product, first review its information by reviewing the query FSU_AUX_PRODUCT_INFO.

You may update any field shown in the screenshots above. You may also inactivate the product.

When updating a price, always insert a new row so that the new prices is effective "as of" the appropriate date. Otherwise, you might bill customers for prices they did not agree to.

After making your desired changes, ensure you navigate back to the 'Assign Price List" page and hit "Save." Otherwise, your changes will not appear in Billing pages and your data will be out of sync.