

Study Manager 13.0

Financials Action Comparison

About this document

The purpose of this document is to outline how important *Financials* functions from Study Manager Version 12 are affected by the new design in Version 13. Further documentation, including the reference manual, tutorials, and training materials will provide more information on how to use the new *Financials* module, and should be consulted in addition to viewing this document.

Action	V 12	V 13	Notes
Financials Setup			
Add/Edit Study Budget	<i>Financials/Budgets</i>	<i>Financials/Budgeting</i>	The menu item was changed to <i>Budgeting</i> , and the same filter options exist.
Add/Edit Financial Events	<i>Financials/Study Financial Events</i>	<i>Financials/Budgeting/View Study Financial Events</i>	Moved to <i>Budgeting</i> screen to better associate w/ study.
Add/Edit Payment Milestones for Study/Site	<i>Financials/Payment Milestones</i>	<i>Financials/Budgeting/View Study Payment Milestones</i>	Moved to budgeting screen to better associate w/ study.
Cash Application			
Add/Edit Incoming Checks	<i>Financials/Checks/Incoming Checks</i>	<i>Financials/Checks/Incoming Checks</i>	No change.
Apply Incoming Checks	<i>Financials/Checks/Apply Incoming Checks</i>	<i>Billing & Reconciliation</i>	Moved to <i>Billing & Reconciliation</i> screen to streamline process and accommodate new features. Note: <i>Apply Check(s) to multiple Studies</i> is no longer an available option. A specific study must be selected.
Remove Incoming Checks from Items	<i>Financials/Checks/Apply Incoming Checks</i>	<i>Billing & Reconciliation</i>	This action has been renamed to "UnApply checks." The process has been made easier because it is now possible to select multiple items, rather than removing one item at a time.

Add/Edit Outgoing Checks	<i>Financials/Checks/Outgoing Checks</i>	<i>Financials/Checks/Outgoing Checks</i>	No change.
Outgoing Check Tracking	<i>Financials/Checks/Outgoing Check Tracking</i>	<i>Financials/Outgoing Check Tracking</i>	Now located in separate icon.
Add/Edit Check Types	<i>Financials/Checks/Check Types</i>	<i>Financials/Checks/Check Types</i>	No change.
Invoicing			
Add/Edit/Print Invoices	<i>Financials/Invoicing</i>	<i>Invoicing, Billing and Reconciliation</i>	There is no change to the <i>Invoicing</i> interface. Items can be added to existing invoice line items from the <i>Billing & Reconciliation</i> screen or from the <i>Invoicing</i> screen.
Manage Invoice Line Items	<i>Financials/Invoicing</i>	<i>Financials/Invoicing, Billing & Reconciliation</i>	There is no change to the <i>Invoicing</i> interface. Existing invoice line items can be filtered for and managed from either the <i>Billing & Reconciliation</i> screen or the <i>Invoicing</i> screen.