Transcript - User Interface Refresh - Expense Module 2

0:01 **VOICE:** Hello. And thank you for viewing the second in our series of CentreSuite expense module tutorials.

0:07 **VOICE:** We hope that this tour of exciting new design elements will be beneficial.

0:12 **VOICE:** You will quickly see how the updated navigation will facilitate viewing, editing, and exporting transactions.

0:18 **VOICE:** We hope that this tour will aid you in communicating details of the CentreSuite User Interface refresh to your commercial customers.

0:27 **VOICE:** To set the stage, I'd like to point out that this will be a high-level overview focusing on areas that have changed as a result of the updates.

0:35 **VOICE:** Let's get started. I will provide a brief simplified overview of some of the changes users will see within the expense module.

0:46 **VOICE:** The core functionality and navigation will not change within the system.

0:49 **VOICE:** Users will see the enhanced responsive design in all areas of the module.

0:54 **VOICE:**
The view transaction options within the expense module will provide the same functionality as it does today.

1:01 **VOICE:** The same account and unit search options will display, along with the save, search and display format options.

1:12 **VOICE:** The advanced search options have been moved to the main screen and will display as a link. Once the link is selected, the advanced search options will display with the same options that are available today.

1:25 **VOICE:** The options to run, save or delete a search will display at the bottom of the screen.

1:35 **VOICE:** Once the search parameters have been entered and the run search options selected, the search results screen will display.

1:49 **VOICE:** Changes have been made to this screen to ensure the column headers always display when scrolling to the bottom of the screen, which may be important to see when displaying 50 or 100 transactions at a time.

2:12 **VOICE:** In addition, new arrow icons will display next to the column headers for easy navigation from the right to the left when there are many transaction fields displayed.

2:27 **VOICE:** Options to take various actions on transactions will now display as icons on the screen instead of options displaying in a drop-down list.

2:36 **VOICE:** When at least one transaction is selected, the icons will become enabled. Users can continue to edit transaction information within the screen including splitting transactions.

2:50 **VOICE:** The export option will continue to display in the search results header. All exported files can continue to be retrieved from the output log.

2:59 **VOICE:** The option to create a new display format remains the same and displays next to the new action icons.

3:08 **VOICE:** Click on the back to search link to return to the search results screen to modify the search criteria.

3:17 **VOICE:** The transaction details screen displays when the detail icon is selected on the search results screen. The detail screen has the same layout as it does today.

3:30 **VOICE:** The option to display more information within the transaction information section and the addendum section has been removed and all details will automatically display in a two-column format.

3:44 **VOICE:** Users will continue to be able to navigate from one transaction to another by selecting previous or next at the top of the screen. Click on the back to results link to return to the results screen.

3:58 **VOICE:** The output log will function as it does today, with the option to download and unmap files displaying first, followed by the file name.

4:11 **[Graphic]** This concludes this update. Click the video to replay, or click on CentreSuite in the trail above this video to return to the previous page.

END