PeopleSoft_Financials_Upgrade_to_PUM51_Delta Payment Request Enhancements

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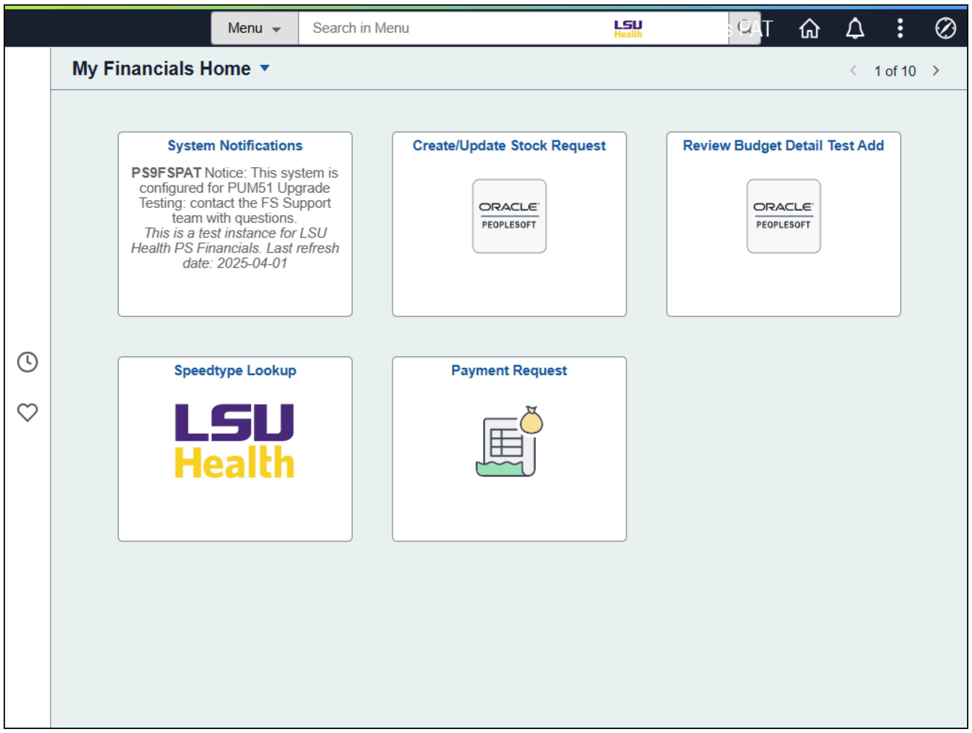
Table of Contents

PeopleSoft_Financials_Upgrade_to_PUM51_Delta

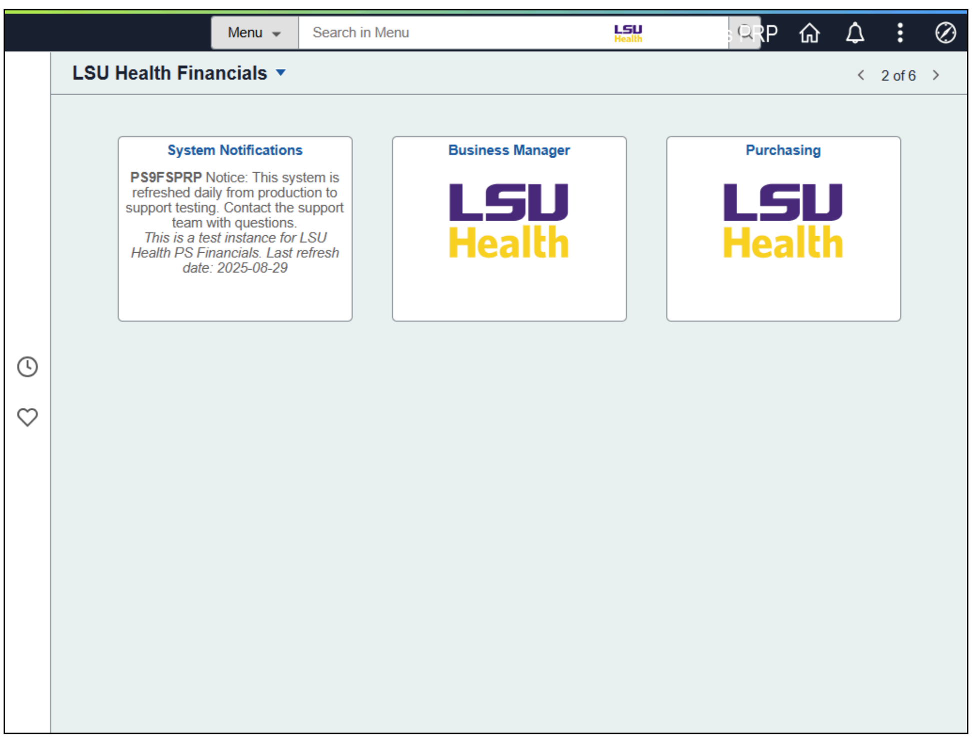
Payment Request Enhancements

Procedure

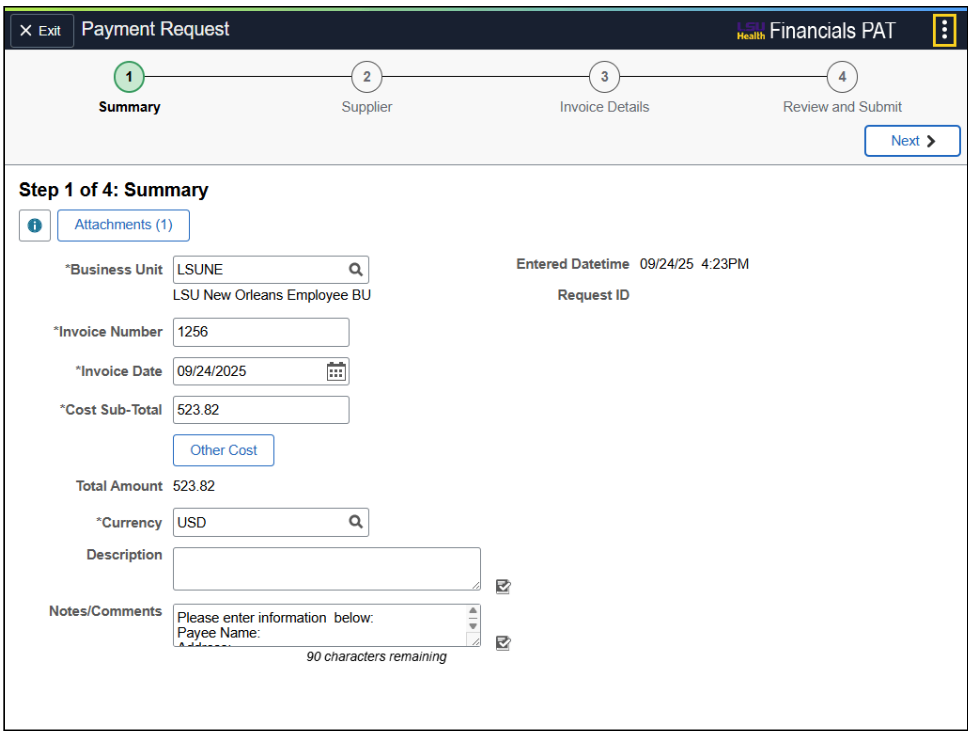
In this topic you will learn about **Payment Request Enhancements**.



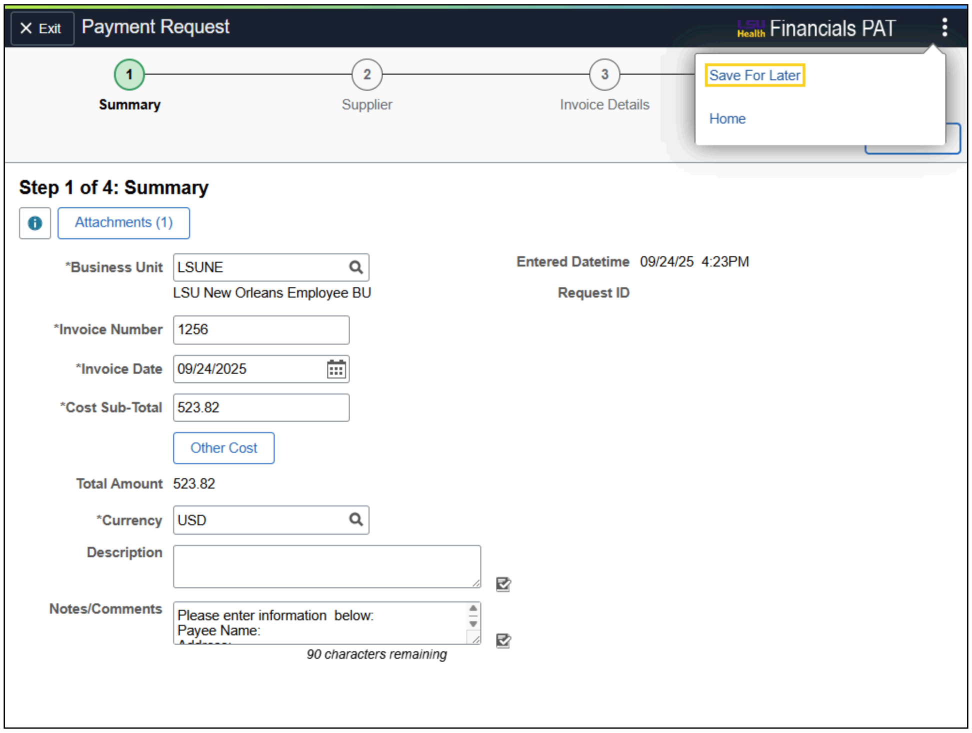
Step	Action
1.	**Payment Requests** ***<u>PAT - Upgraded</u>*** ***Payment Requests*** include several enhancements with the upgrade. The Support Team has created an *updated Payment Request User Guide* for the ***New Orleans*** and ***Shreveport*** campuses. The **Payment Request Center**, *to create or review requests*, is accessible from the **My Financials Home** or **LSU Health Financials**. • *Added* the *Payment Address* field in the Supplier page. • *Added* an option to *edit* the *supplier payment address* while *creating or updating payment request transactions*. • *Validate duplicate invoice numbers* before submission, review and approval of a request. • Fluid **Payment Request** template includes *new fields*: *Accounting Tags*, *Payment Handling, Payment Message*, and *Separate Payment*. • *Requesters* can now *update* payment requests until the transaction has been *fully approved*. • *Requesters* can now create a *new request* by *copying* from an existing request. • *Save For Later* button *changed* to *access* from the **Actions** menu.



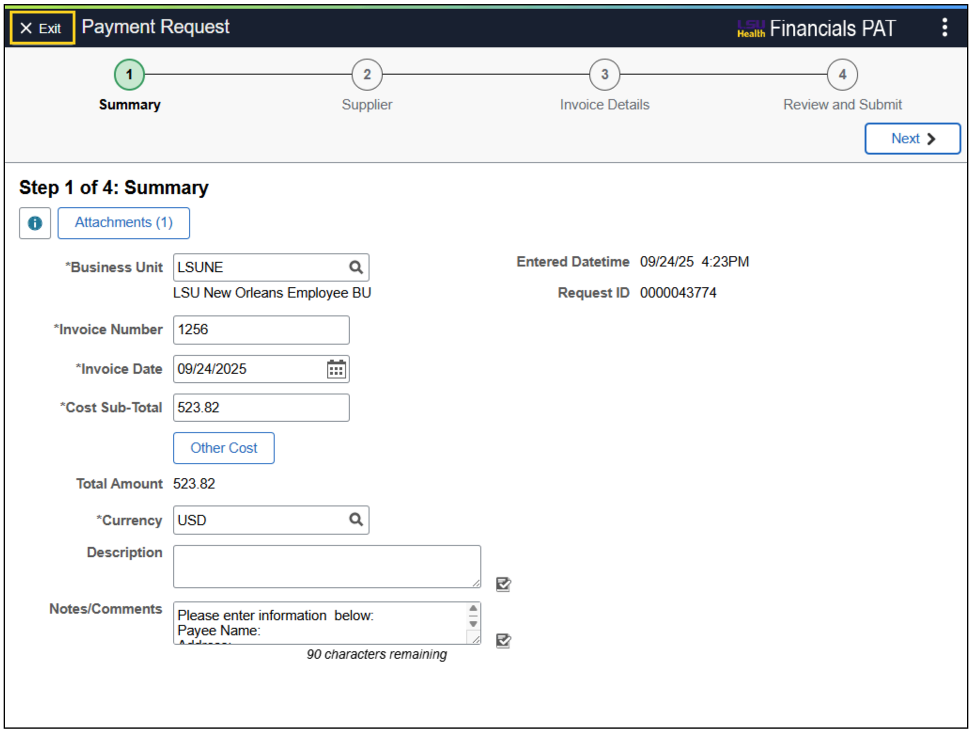
Step	Action
2.	**Payment Request - Save For Later** ***PRP - Not upgraded*** In fluid payment requests, the ability to ***'Save For Later'*** still exists. However, there is no longer a *button* on the page. Users will need to *select* the *Actions ellipses* to be able to ***'Save For Later'*** from the **Payment Request** *entry page*.



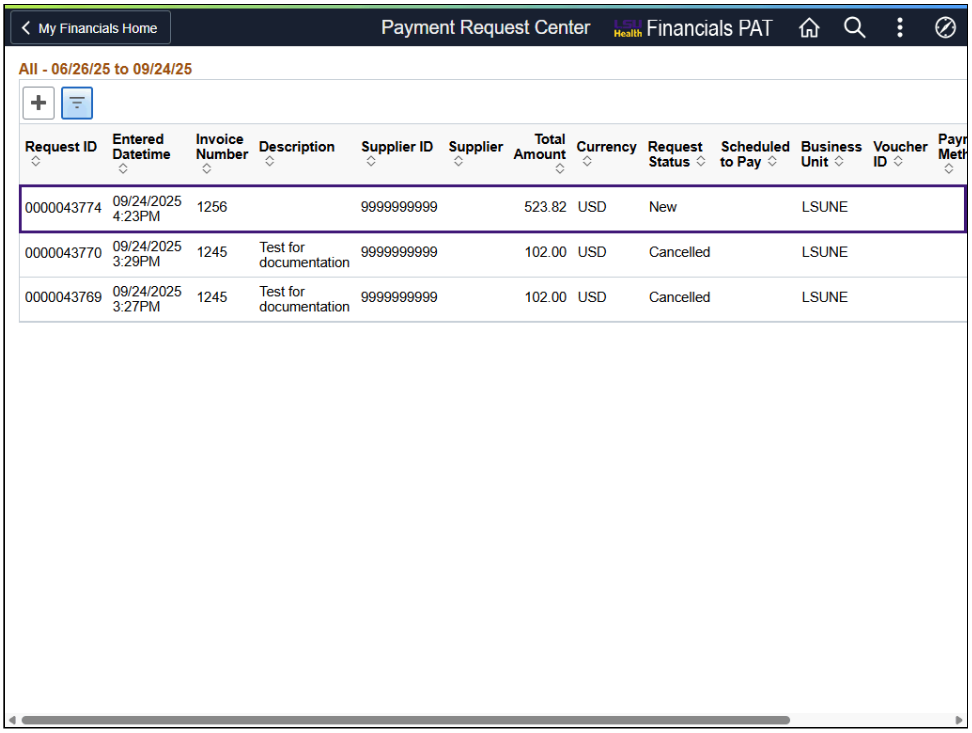
Step	Action
3.	**Payment Request - Save For Later** ***PAT - Upgraded*** Three **(3)** fields must contain data before a ***Save For Later*** can be initiated: 1. *Invoice Number 2. *Cost Sub-Total 3. Attachments Click the **Actions (3 dots)** menu. 



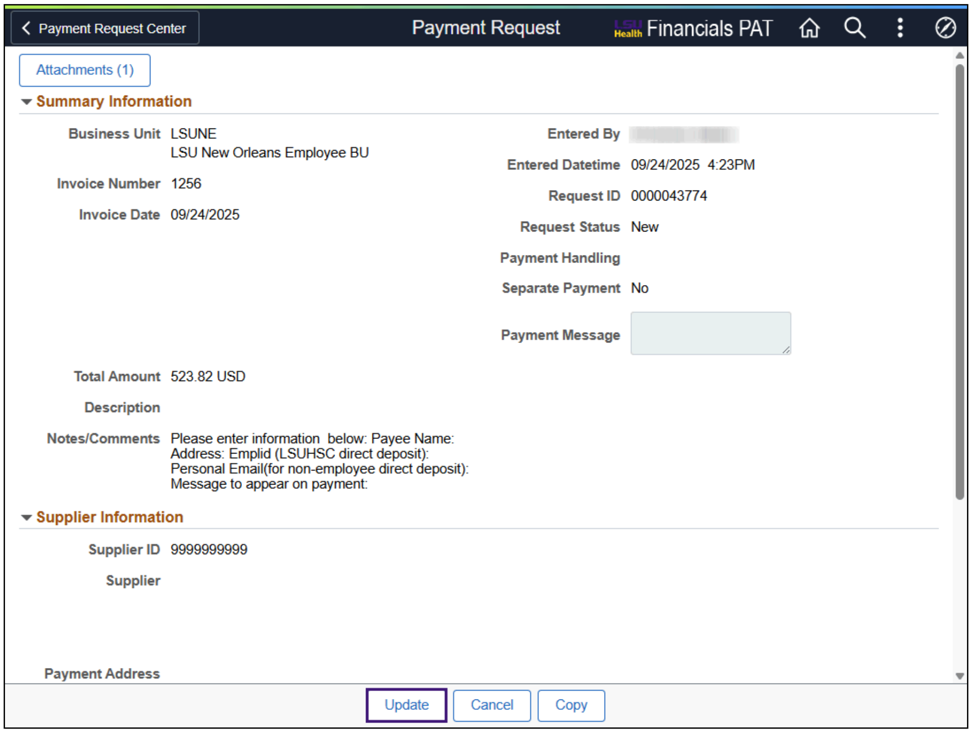
Step	Action
4.	**Payment Request - Save For Later** ***PAT - Upgraded*** Click the **Save For Later** link. Save For Later



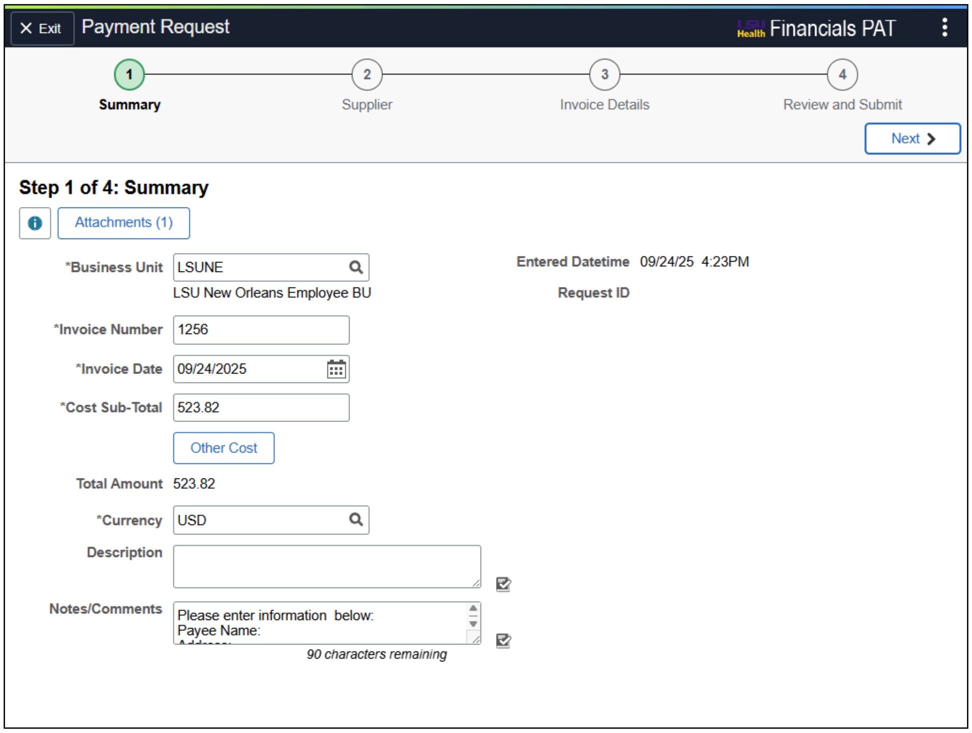
Step	Action
5.	**Payment Request - Save For Later** ***<u>PAT - Upgraded</u>*** ***NOTE: A green bar displays at the top of the page stating the save is in progress. When completed, the Payment Request number is provided.*** Click the **Exit** button. 



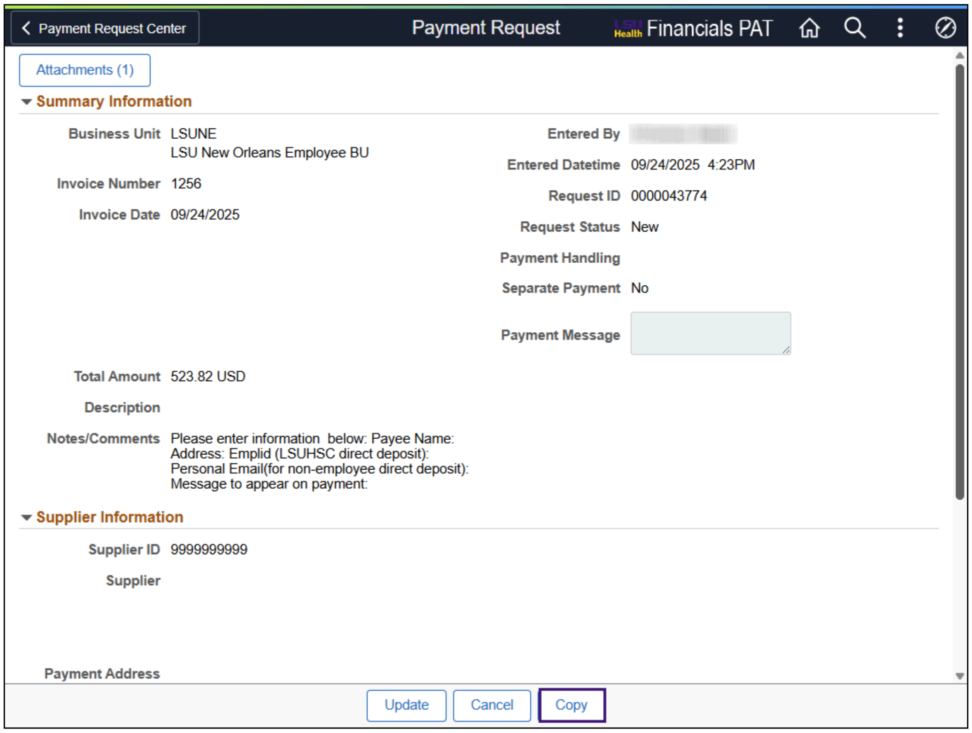
Step	Action
6.	**Payment Request - Update** ***<u>PAT - Upgraded</u>*** The *top line* is *always* the *most <u>recent</u>* request. *Select* the ***Payment Request*** you wish to continue with by *clicking* anywhere on the *desired line*.



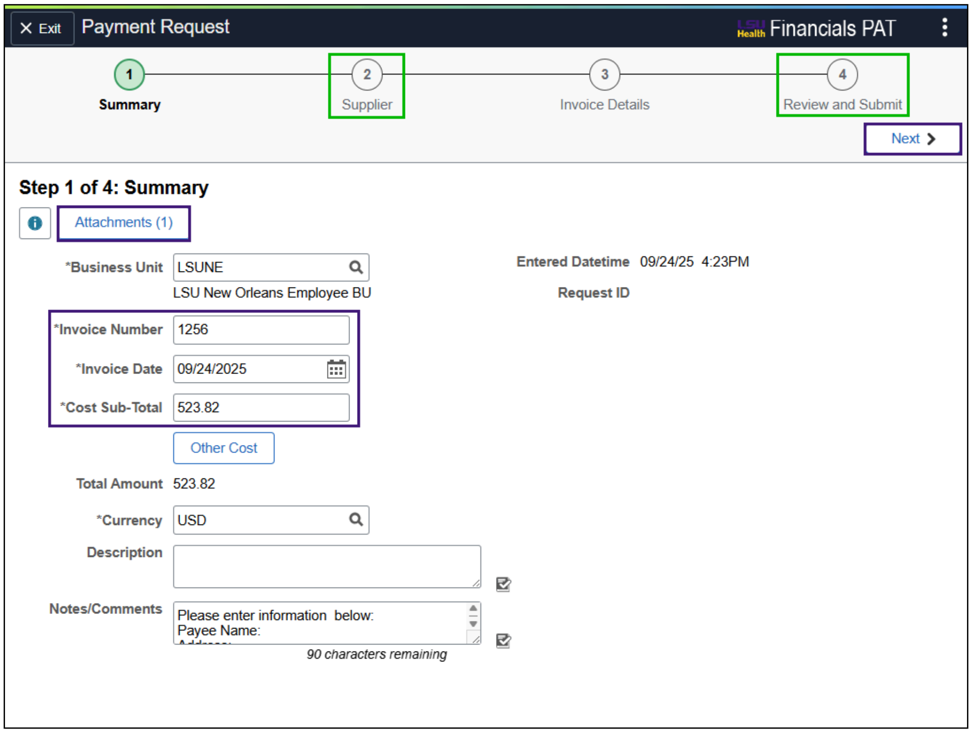
Step	Action
7.	**Payment Request - Update** ***PAT - Upgraded*** To *continue* working on the *Payment Request*, the user must scroll to the *bottom* of the *Summary Page* and *select* the ***Update button***.



Step	Action
8.	**Payment Request - Update** ***PAT - Upgraded*** The system will *default* the user onto the **Payment Request** *page at Step 1 of 4: Summary*. The ***Save For Later*** option can be *utilized as often as needed*.



Step	Action
9.	**Payment Request - Copy** ***PAT - Upgraded*** Users may *copy* an *existing* **Payment Request (PR)** to *create* a *new* one. To perform this action, the user will *select* the **Payment Request** tile and then *search* for the *desired* **Payment Request**. At the *right end* of the *Payment Request list*, select the *arrow* to view the *PR*. Then, *once in the PR, scroll down* to the *bottom* of the page. *Select* the *Copy* button.



Step	Action
10.	**Payment Request - Copy** ***PAT - Upgraded*** *All* the data will be *copied* into the new **PR** EXCEPT the *Supplier ID* and the *Attachments*. The user then *updates* the *date*, *invoice number*, *supplier*, *amounts* and *attachments* to *complete* and *submit* the **PR**.
11.	**********WARNING********** **Payment Request - Cancel** ***PAT - Upgraded*** The **Cancel** button works as a ***DELETE*** button. **Cancel** ***cannot*** be *undone*. If the user selects the **Cancel** option, a *cancellation confirmation message* will be displayed.

Step	Action
12.	**********WARNING********** **Payment Request - Cancel** ***<u>PAT - Upgraded</u>*** If the user wishes to **<u>Cancel</u>** the payment request, s/he will select **OK**. If the user does **<u>not</u>** wish to **<u>Cancel</u>** the ***Payment Request***, s/he will select the ***Cancel*** button to *return* to the **Payment Request** page. In this example, the **OK** button is *selected*.
13.	**********WARNING********** **Payment Request - Cancel** ***<u>PAT - Upgraded</u>*** The user is *returned* to the ***Payment Request Center***, and the *payment request displays* a ***Request Status*** of **Cancelled**.
14.	This completes ***Payment Request Enhancements***. **End of Procedure.**