AR.010.010 – ADDING A CUSTOMER

Purpose	• To learn how to add a customer in the system.
Description	This topic demonstrates how to add a customer. Customers must exist in the system in order to process payments received from them. Customer information is entered on the Customer Information pages. Customers can be individuals such as an employee or a retired employee, or they can be entities such as other institutions, state and federal agencies, or private corporations. The extent to which the user uses customers will differ based on your institutional needs.
Security Role	**BOR_AR_CUSTOMER**
Dependencies/ Constraints	Before adding a customer, users should first search the customer to see if they already exist in the system.
Additional Information	None

Procedure

Below are step by step instructions on how to add a new customer.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **Customers** link.
4.	Click the **Customer Information** link.
5.	Click the **Create Customer Information** link.
6.	The **General Information** page will automatically open to the **Find an Existing Value** tab. To keep a clean customer file, before adding a new customer, users may need to confirm that the customer is not already in the system. Users may consider searching for alternate names, for example IBM could be in the system as IBM, I B M, or International Business Machines, etc. Users can search for an existing customer on this page by entering data in one or more of the fields and clicking the **Search** button.
7.	If users wish to add a new customer record, click the **Add a New Value** tab.
8.	The **Customer ID** field should remain as **NEXT** when the user is adding a new value. Click the **Add** button.
9.	Use the General Info tab to add or review a customer's name and level information and assign associated roles.
10.	Ensure that the **Customer Status**, **Date Added**, and **Since** fields are correct. The **Date Added** field should be the date when the user established this customer in the system. Users can specify a different **Since** date, to indicate that the customer has been a customer since a certain date, which may or may not be the date added. The current date appears by default for both fields
11.	Click the **Level** list. Select the correct entry from this list for your new customer.
12.	Click the **Type** list. Select the correct type for your new customer.
13.	Enter the customer’s name in the **Name 1** field. We recommend using the LastName,FirstName format. The Name 2 field is optional.
14.	Enter an abbreviated version of the customer's name in the **Short Name** field.

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15.	Enter "**USD**" in the **Currency Code** field.
16.	Click the **Rate Type** button. Select the **CRRNT** entry in the **Rate Type** column.
17.	A user's institution may decide to use the Roles based on the functionality specifically required for a customer, or the user may decide to enable all applicable checkboxes. Even though the user may not use the functionality in all of these boxes, having them checked will ensure that the customer's functionality is not limited for future purposes. Select the appropriate **Roles** for the customer.
18.	Click the **Team Code** button.
19.	Select the **Sales Support Team** entry from the **Description** column. This is not used by Georgia*FIRST*, but it is required by PeopleSoft.
20.	Click the **Default** checkbox. This is a required field.
21.	Click the scrollbar to navigate to the bottom of the page.
22.	Enter a description of the type of address in the **Description** field. This will help identify the address in the event that the user has more than one.
23.	Click the **Bill To** checkbox.
24.	Click the **Primary** checkbox next to the **Bill To** field.
25.	Click the **Ship To** checkbox.
26.	Click the **Primary** checkbox next to the **Ship To** field.
27.	Click the **Sold To** checkbox.
28.	Click the **Primary** checkbox next to the **Sold To** field.
29.	Click the **Correspondence Address** checkbox.
30.	Make sure that the **Effective Date** is correct for this address, and that the Status is **Active**.
31.	Next, enter the address information for the customer including street address, city county, state & postal zip code.
32.	Enter customer's address in the **Address 1** field.
33.	The **In City Limit** and the **Alternate Names** fields are optional.
34.	Click the **View Phone Information** link.
35.	Enter the phone information for the customer.
36.	Click the **OK** button.
37.	Click the **Bill To Options** tab
38.	Click the **Look up Credit Analyst** button.

Step	Action
39.	Select the **CreditAnalyst1** entry in the **Name 1** column. This is not used by Georgia*FIRST*, but it is required by PeopleSoft.
40.	Click the **Look up Collector** button.
41.	Select the **COLLECT1** entry in the **Collector** column. This name will show on dunning letters for this customer.
42.	The **Ship To Options** tab and the **Sold To Options** tab can be used to further store customer information.
43.	Click the **Miscellaneous General Info** tab.
44.	Enter the SSN or FEI number into the **Tax ID** field.
45.	Click the **Save** button.