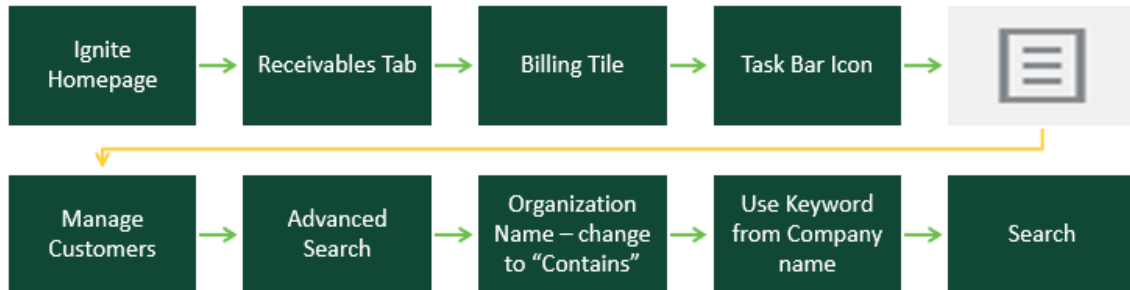


Accounts Receivable: Create Customer

Overview

- Before a new customer is created, a search should be conducted to determine if the customer already exists in the Receivables Module.



- If the customer does not already exist, this job aid should be used by the Accounts Receivable Specialist to create a customer in the Receivables module.
- The Accounts Receivable Specialist will need to obtain the information necessary to create the customer account, such as Legal name of customer or organization as well as bill to and ship to addresses.
- The Accounts Receivable Specialists can initiate and complete the following accounts receivable tasks:
 - *Create a new customer*
 - *Create a customer account for an existing customer.*

Accounts Receivable: Create Customer

I. Navigating to the Receivables Module

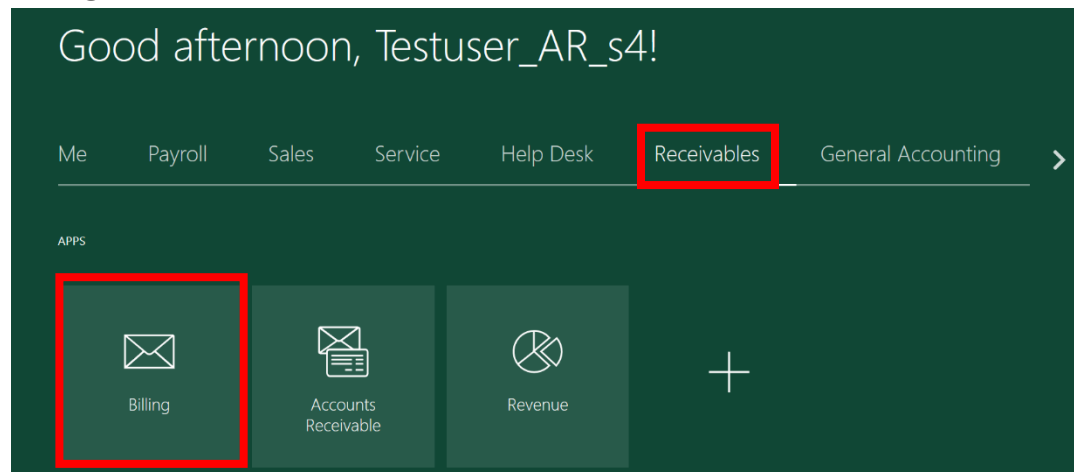
- I. You can access the **Billing** section in two ways:
 - a. (Option 1) Click the **Navigator icon** in upper left-hand corner of the Ignite landing page.



- b. Under the **Receivables** section, click the drop down arrow, and select **Billing**.



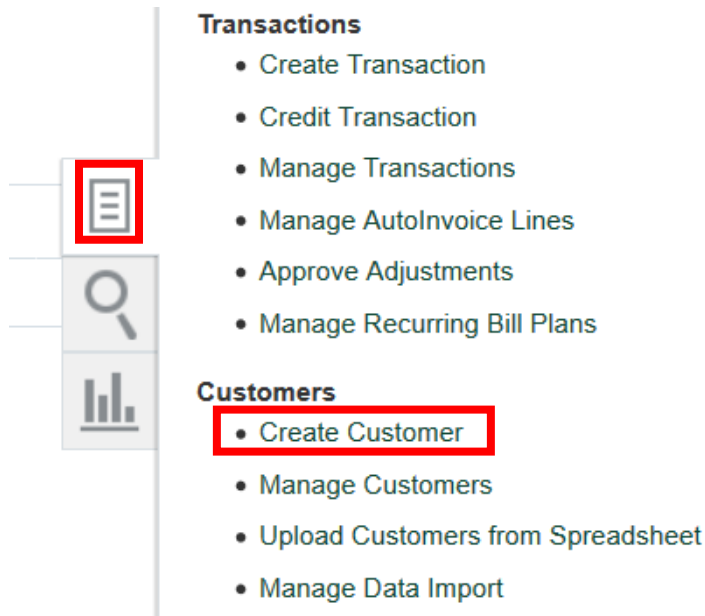
- c. (Option 2) Under the **Receivables** heading on the home page, select the **Billing** tile.



Accounts Receivable: Create Customer

2. Creating a Customer

1. Click the **Task** icon in the top right side of the screen, then select **Create Customer**.



2. When creating a customer account, fill out the following fields:

Create Organization Customer

Customer Type Organization

Organization Information

* Name

Registry ID 56567

- a. ***Customer Type** – Select Organization.
- b. ***Name** – Enter complete legal entity name.
- c. **Registry ID** – Unique identifier of the territory partner; this will auto-populate

Accounts Receivable: Create Customer

3. Enter **Account** information:

Account Information

Account Number	5001	Account Established Date	1/1/01
Account Description	Psy Dept Practicum Billing	Account Termination Date	
Account Type	External		
Customer Class	Non-governmental Organization		

- Account Number** – Automatic numbering will define a unique number
- Account Description** – Enter a description of the account.
- Account Type** – Select **External**.
- Customer Class** – Select appropriate classification.
- Account Established Date** – Enter 01/01/1901.

4. Enter **Account Address** information:

Account Address

* Account Address Set	
* From Date	1/1/01
To Date	

- *Account Address Set** – Select **Enterprise** from the menu.
- From Date** – Change to 1/1/1901.
- To Date** – Leave blank for creation process.

Accounts Receivable: Create Customer

5. Enter **Address** information:

▲ Address

Site Number 80257

Site Name

Mail Stop

Country

* Address Line 1

Address Line 2

Address Line 3

* City

* County

* State

* Postal Code

Sales Tax Geocode

Sales Tax Inside City Limits

- a. **Site Number** – Auto populates
- b. **Site Name** – Enter name for this site.
- c. **Address** – Enter Street Address and Postal Code first, then the system will provide options to select City, State & County. ****Use the abbreviated state designation.***
- d. **Note:** Uncheck **Sales Tax Inside City Limits** box; unless otherwise instructed.

6. Enter **Account Address Details**:

▲ Account Address Details

Customer Category Code

Site Language

Translated Customer Name

Key Account

Trading Partner Identifier

EDI Location Code

- a. **Site Language** – Select **American English**.

Accounts Receivable: Create Customer

7. Create an **Address Purpose** for billing and shipping. Scroll down to the **Address Purposes** section of the window. Click the **+** to add a row, then enter the following data:

▲ Address Purposes

Actions ▾ View ▾ Format ▾ **+** ✕ ☑ ↶ Wrap

	Primary	Site	From Date	To Date	Purpose	Bill-to Site
▶		6492	01/01/1901	12/31/2019	Bill to ▾	

- a. **Site** – Accept default value.
- b. **From Date** – 1/1/1901.
- c. **To Date** – Leave blank for creation process.
- d. **Purpose** – Select **Bill to** from drop down.

Recommended Action: Click **Set Primary** from the **Actions** drop down menu for Primary Bill-to address. This is shown below:

▲ Address Purposes

Actions ▾ View ▾ Format ▾

- Add Row
- Delete
- Set Primary**

	Primary	Site	From Date	To Date	Purpose	Bill-to Site
▶		6492				

8. Create a **Ship to Address Purpose** by clicking the **+** icon to add a row and entering the data same as above, except for the following fields:

▲ Address Purposes

Actions ▾ View ▾ Format ▾ **+** ✕ ☑ ↶ Wrap

	Primary	Site	From Date	To Date	Purpose	Bill-to Site
▶		6493	01/01/1901		Ship to ▾	▾
▶	✓	6492	01/01/1901	12/31/2019	Bill to ▾	

- i. **Purpose** – Select **Ship to** from menu.
- ii. **Bill-to Site** – Select the **Address** created for the customer above.

Accounts Receivable: Create Customer

9. Click the **Save and Close** when complete.

Create Organization Customer **Save and Close** Cancel

Customer Type

Organization Information

* Name
Registry ID

D-U-N-S Number
Taxpayer Identification Number

Account Information

Account Number
Account Description
Account Type

Account Established Date
Account Termination Date