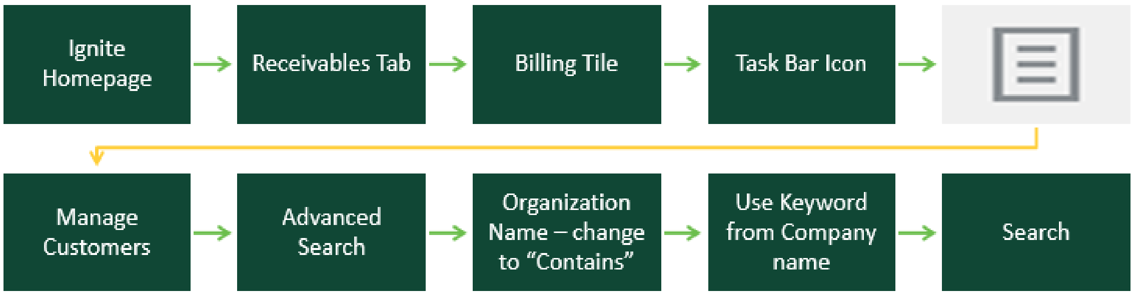
Accounts Receivable: Create Customer

Overview

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

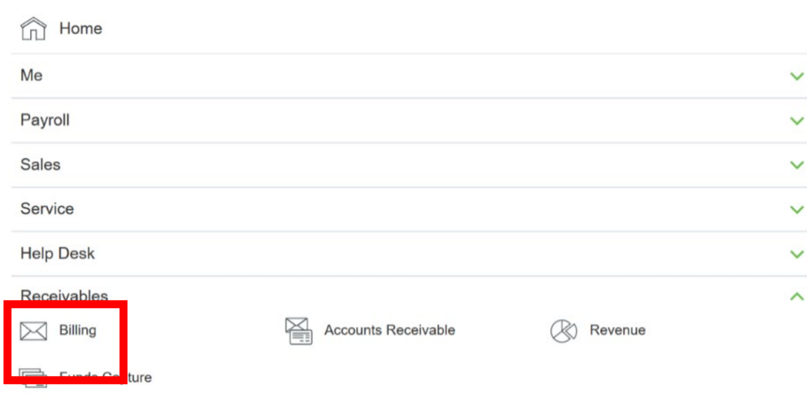


- If the customer does not already exist, this job aid should be used by the Accounts Receivable Specialist to create a customer in the Receivables module.
- The Accounts Receivable Specialist will need to obtain the information necessary to create the customer account, such as Legal name of customer 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.*

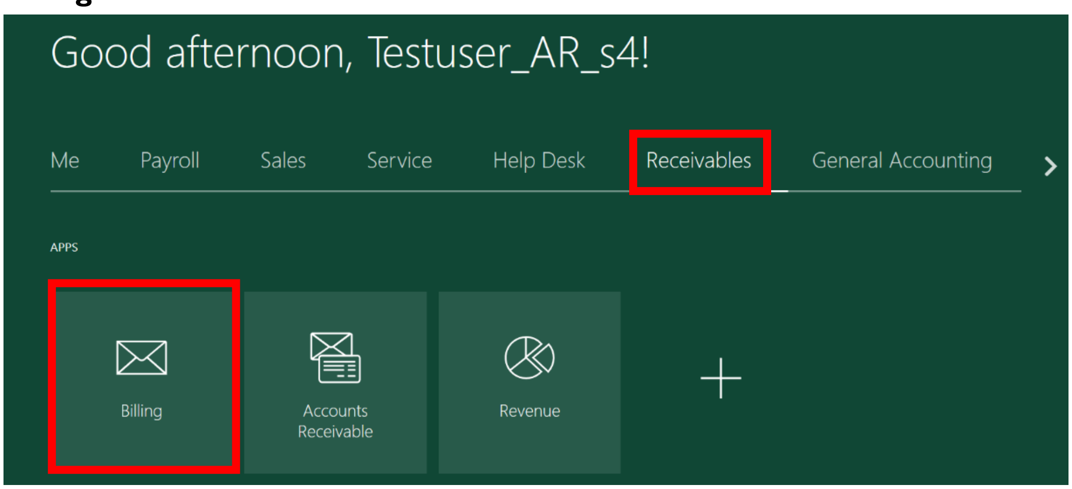
1. Navigating to the Receivables Module

1. 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**.

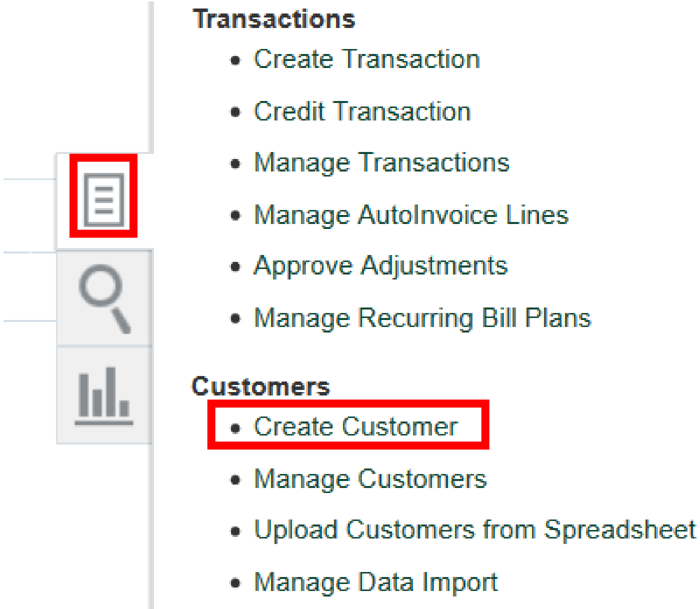


    c. (Option 2) Under the **Receivables** heading on the home page, select the **Billing** tile.

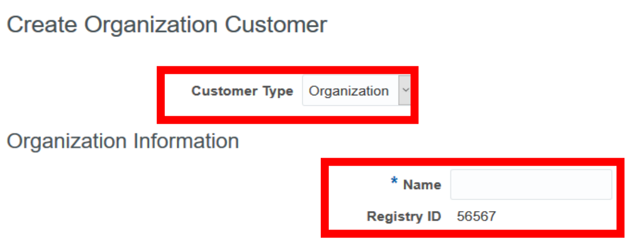


2. Creating a Customer

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:

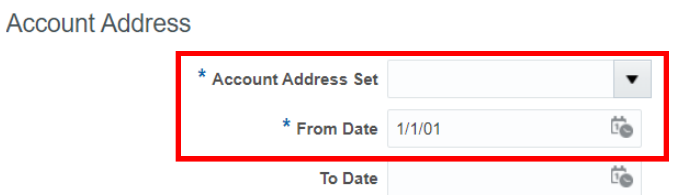


   a. ***Customer Type** – Select Organization.
   b. ***Name** – Enter complete legal entity name.
   c. **Registry ID** – Unique identifier of the territory partner; this will auto-populate

3. Enter **Account** information:

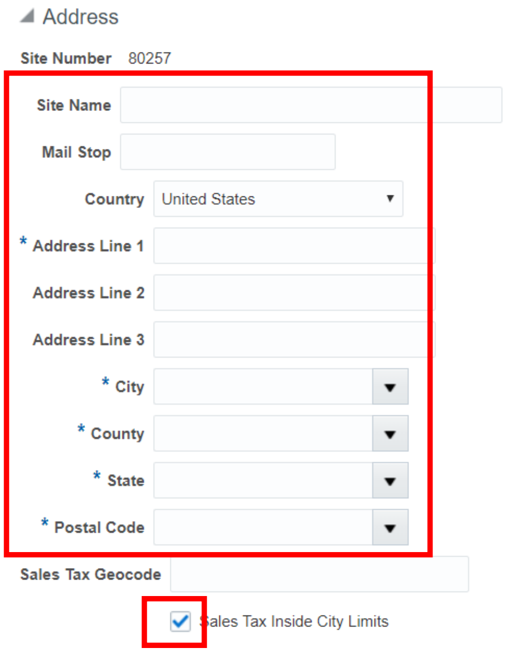
   a. **Account Number** – Automatic numbering will define a unique number
   b. **Account Description** – Enter a description of the account.
   c. **Account Type** – Select **External**.
   d. **Customer Class** – Select appropriate classification.
   e. **Account Established Date** – Enter 01/01/1901.

4. Enter **Account Address** information:



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

5. Enter **Address** information:

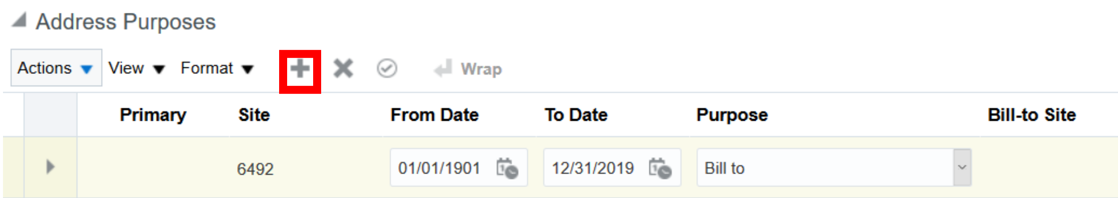


   a. **Site Number** – Auto populates
   b. **Site Name** – Enter name for this site.
   c. **Address** – Enter Street Address and Postal Code first, then the system will provide options to select City, State & County. ***Use the abbreviated state designation.***
   d. **Note**: Uncheck **Sales Tax Inside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

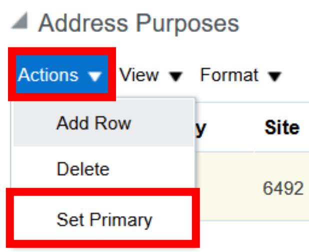
6. Enter **Account Address Details:**

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

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:



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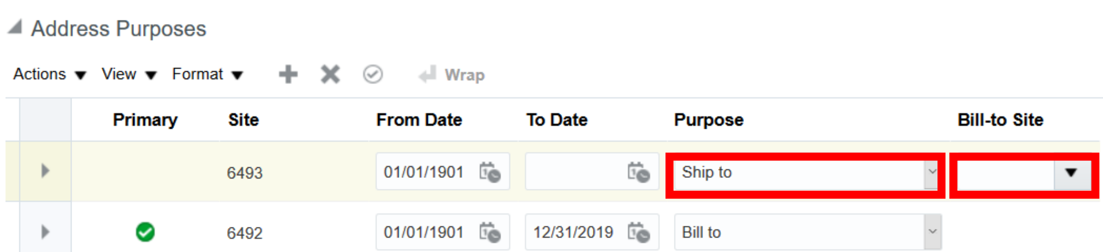
8. Create a **Ship to Address Purpose** by clicking the **+ icon** to add a row and entering the data same as above, except for the following fields:



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

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