Accounts Receivable: Maintain Customer Data

Overview

- This job aid should be used by the Departmental Accounts Receivable Specialist to access guidance on related tasks to update or manage customer data.
- The Departmental Accounts Receivable Specialist will need to obtain the customer information necessary for completing the customer account, customer site, site profile, and site contacts. These may be completed separately or concurrently during the creation of a customer.
- The departmental Accounts Receivable Specialists can initiate and complete the following accounts receivable tasks: create and maintain customer data. Examples include:
    - *Create a new customer by creating a customer account, site profile, and site contacts.*
    - *Create a customer account for an already existing customer.*
    - *Create a site profile for an already existing customer site.*
    - *Add site contacts to an already existing site on an already existing contact.*

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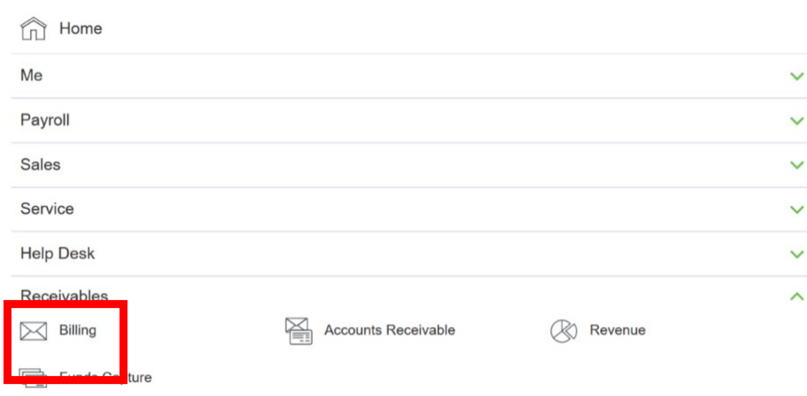
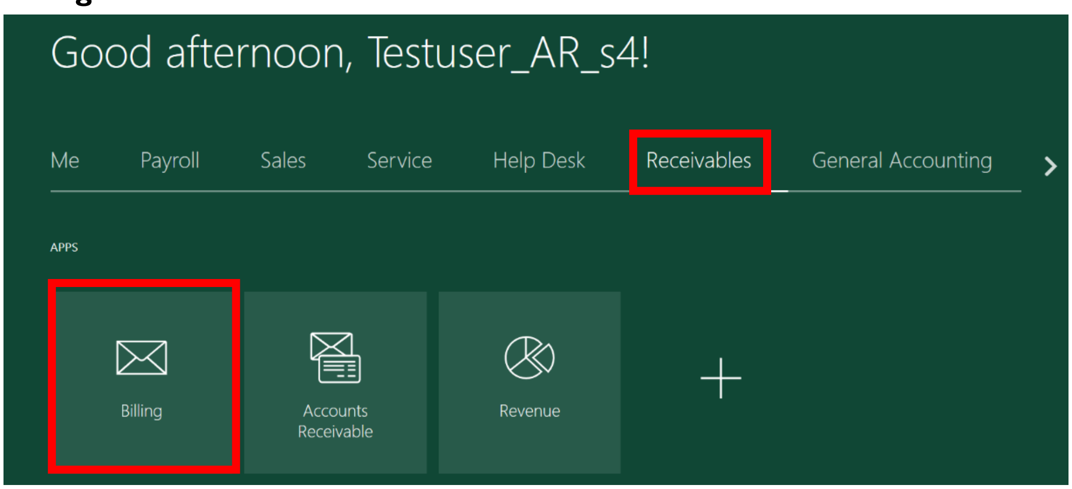
1. Navigating to the Receivables Module

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**.

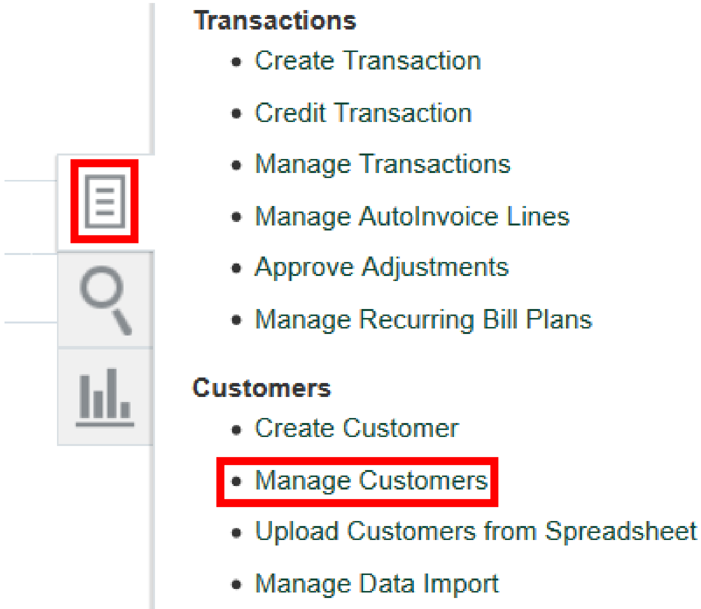


    c. (Option 2) Under the **Receivables** heading on the home page, select the **Billing** tile.

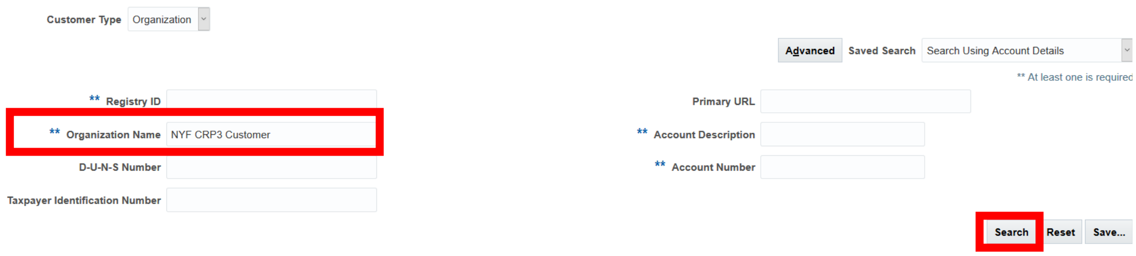


2. Managing Customer Data: Site Contacts, Customer Site, and Site Profile

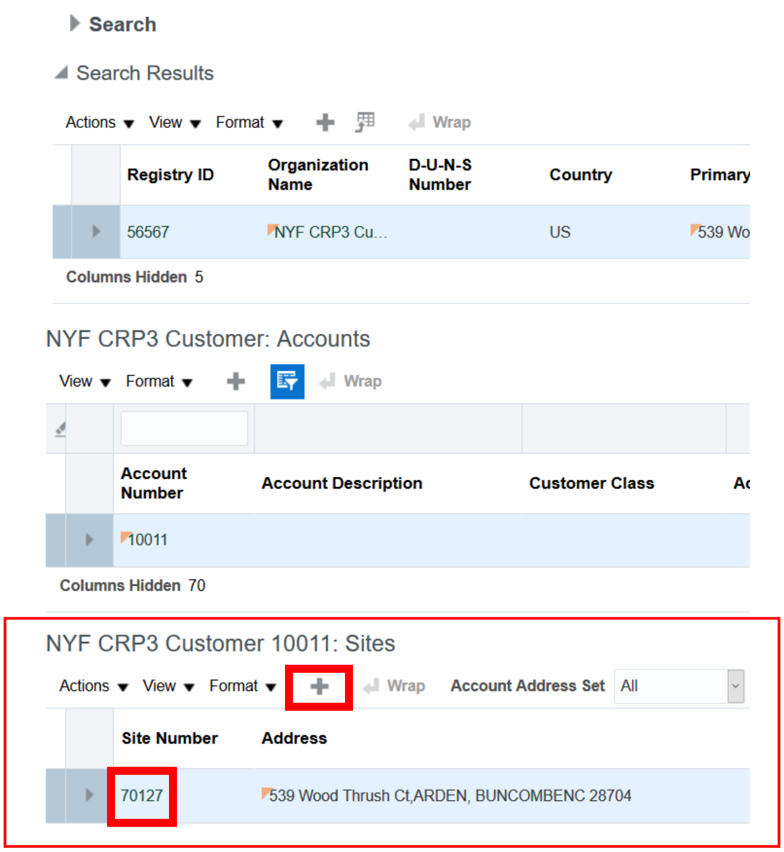
1. Click the **Task icon** in the top right side of the screen, then select **Manage Customer**.



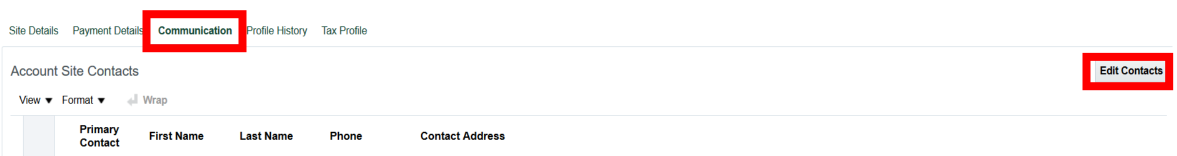
2. Enter the Customer Account name in the **Organization Name** field and select **Search**.



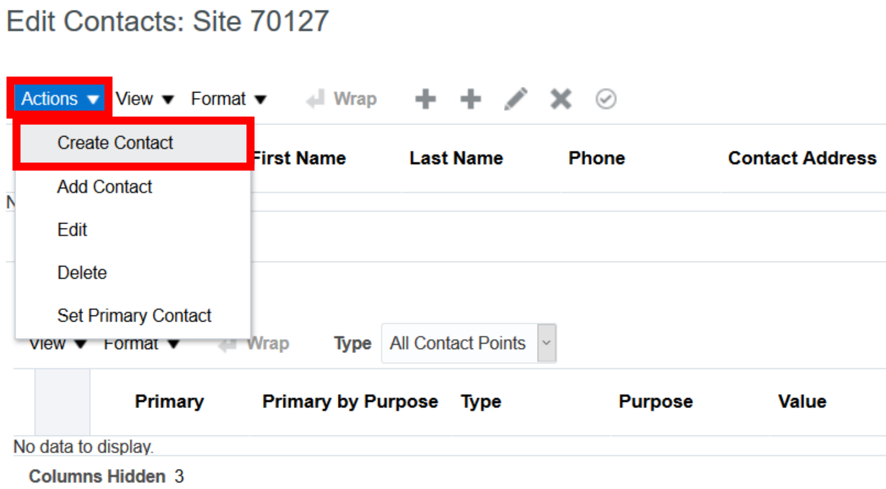
3. In the **Customer Site** section, click on the hyperlinked **Site Number** to edit the existing Site information, or click on the **+ icon** to add additional sites:



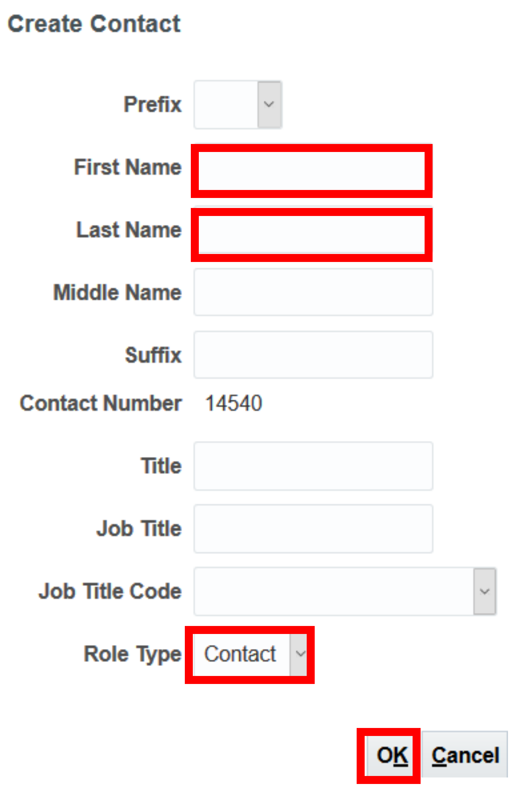
4. Open the **Communication** tab and click on the **Edit Contacts** button.



5. Click on **Actions** and then **Create Contact**.

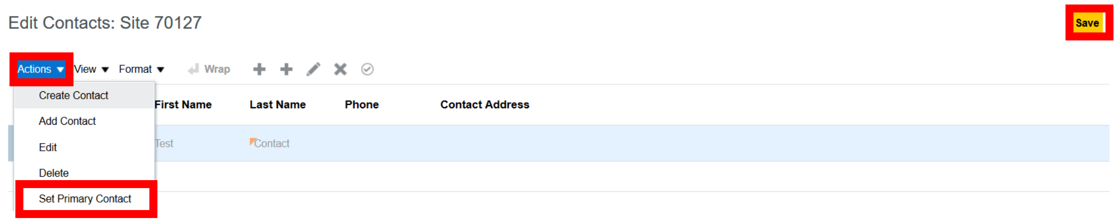


a. To create a contact fill out the following fields and then select **OK**:

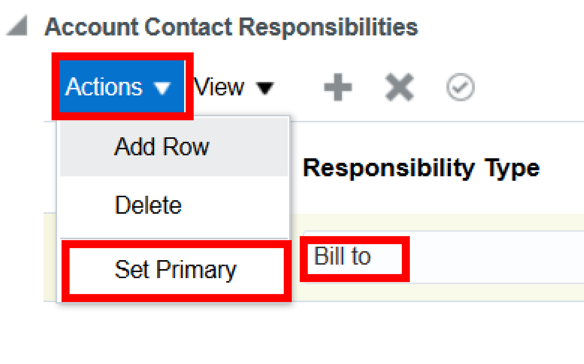


i. **First Name** – Legal first name of contact.
ii. **Last Name** – Legal last name of contact.
iii. **Role Type** – Enter it as **Contact**.

b. Click on **Actions** and **Set Primary Contact**. Then click **Save**, as shown below.



c. (Optional) Scroll down to Account Contact Responsibilities. Click the Actions menu, select Set Primary then Bill to.



i. **Responsibility Type** – Select the responsibility to assign to this contact. For example: **Bill to**, **Ship to**, **Deliver to**. Repeat this step as necessary using the **+ icon**.

ii. **Recommended Action**: Click on **Actions** and **Set Primary**.

6. Click **Save and Close**.