

# 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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## I. Navigating to the Receivables Module

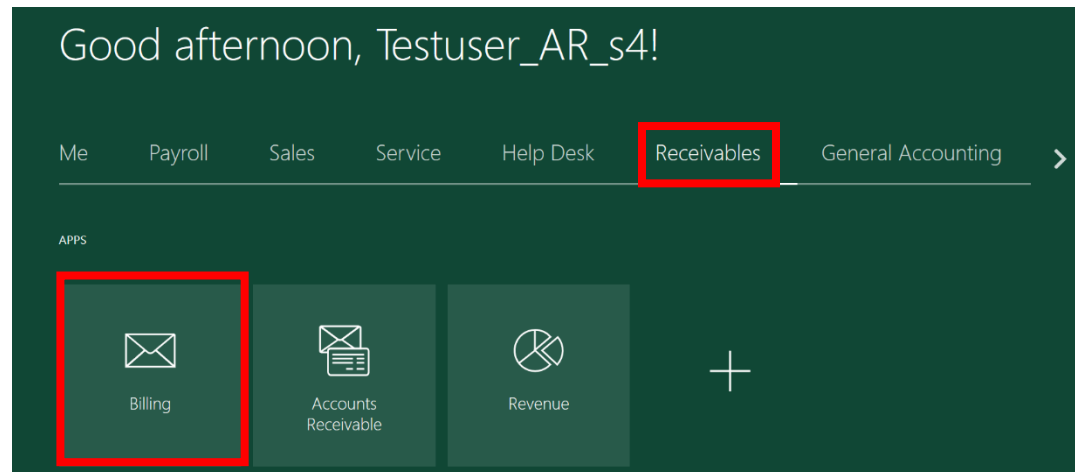
- I. You can access the **Billing** section in two ways:
  - a. (Option 1) Click the **Navigator icon** in upper left-hand corner of the Ignite landing page.



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



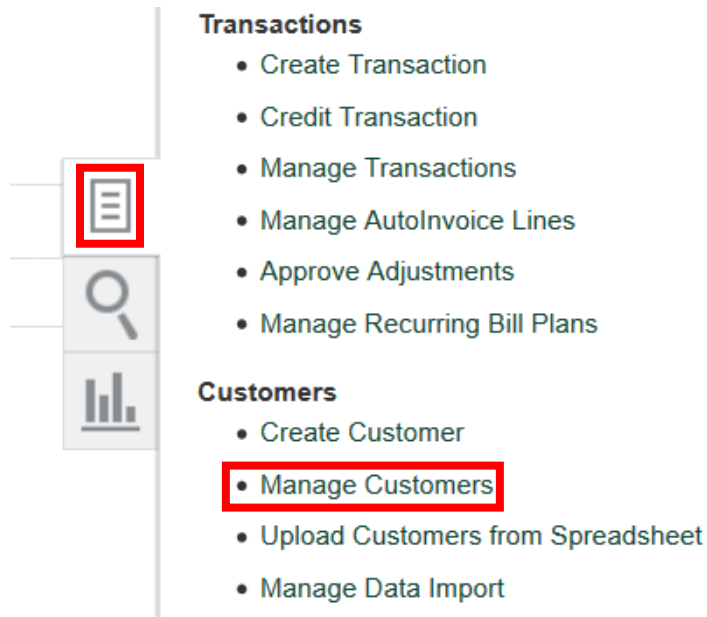
- c. (Option 2) Under the **Receivables** heading on the home page, select the **Billing** tile.



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

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



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

The screenshot shows a search form with several input fields. The 'Organization Name' field is highlighted with a red box and contains the text 'NYF CRP3 Customer'. Below the form, the 'Search' button is also highlighted with a red box. Other fields include 'Registry ID', 'D-U-N-S Number', 'Taxpayer Identification Number', 'Primary URL', 'Account Description', and 'Account Number'. A note at the top right states '\*\* At least one is required'.

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:

The screenshot displays the search results for 'NYF CRP3 Customer'. It shows a table with columns for Registry ID, Organization Name, D-U-N-S Number, Country, and Primary. Below this, there is a section for 'NYF CRP3 Customer: Accounts' with a table for Account Number, Account Description, and Customer Class. The final section, 'NYF CRP3 Customer 10011: Sites', is highlighted with a red box and shows a table with Site Number and Address. The '+' icon in the actions menu and the '70127' site number are also highlighted with red boxes.

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

The screenshot shows the 'Communication' tab selected in the top navigation bar. Below it, the 'Account Site Contacts' section is visible, and the 'Edit Contacts' button is highlighted with a red box. The table below has columns for Primary Contact, First Name, Last Name, Phone, and Contact Address.

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

Edit Contacts: Site 70127

Actions View Format Wrap + + ✎ ✕ ☑

Create Contact

Add Contact

Edit

Delete

Set Primary Contact

view Format Wrap Type All Contact Points

Primary	Primary by Purpose	Type	Purpose	Value
No data to display.				

Columns Hidden 3

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

## Create Contact

Prefix

First Name

Last Name

Middle Name

Suffix

Contact Number 14540

Title

Job Title

Job Title Code

Role Type Contact

OK Cancel

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

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

Edit Contacts: Site 70127 **Save**

Actions View Format Wrap + + ✎ ✕ ☑

	First Name	Last Name	Phone	Contact Address
Actions	Test	Contact		

Set Primary Contact

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

Account Contact Responsibilities

Actions View + ✕ ☑

	Responsibility Type
Set Primary	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**.

Edit Contacts: Site 70127 **Save** **Save and Close** **Cancel**

Actions View Format Wrap + + ✎ ✕ ☑

Primary Contact	First Name	Last Name	Phone	Contact Address
☑	Test	Contact		

Columns Hidden 5

Contact Points

Actions View Format Wrap Type All Contact Points

Primary	Primary by Purpose	Type	Purpose	Value	Contact Preferences	Role
No data to display.						

Columns Hidden 3 Date Range: Current