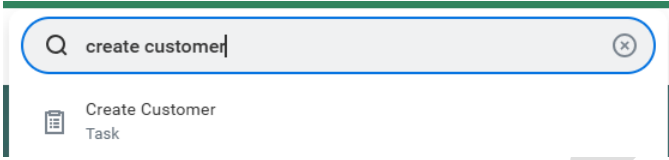


Customer Accounts/Revenue: Create and Maintain Customer

Audience / Role	Customer Administrator Customer Billing Specialist
Description	This job aid provides instructions to create a customer and edit a customer. A customer is shared in the system and each customer includes a record/profile containing summary information, payment details, contact information, and invoices and payments.

Create Customer

1	In the Search bar, enter Create Customer. In the search results, select the Create Customer task. 
2	Under Create Customer, complete the fields for this task. All required fields are indicated with a red asterisk. • Customer Name – Enter a unique name for the customer. • Create Customer from Business Entity – Leave blank. • Status – Active. • Customer Category – Select the customer category. • Customer Group – Select the customer group. • Payment Terms – Enter Payment Terms if known. • Default Tax Code – Leave blank. • Accept These Currencies – select the radio button and then select USD in the field. • Default Currency – Select USD. • Customer Security Segment – Leave blank. Select OK.
3	Under Create Customer, enter the following into the fields: For the Proposed section, select and/or verify the Status. <i>You will only need to update the reason and reason description for a customer when you are amending the customer account.</i> For the Summary Section, select and/or verify the Customer Category.
4	Under the Related Worktags tab, leave blank.
5	Under the Credit and Collections tab, leave blank.

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6	Under the Payment Details tab, select the Payment Terms you would like to default for this customer. Confirm the currency is Accept These Currencies and USD .
7	Under the Banking tab, leave blank.
8	Under the Tax Information tab, update the fields if necessary.
9	Under the Notes tab, add any notes relevant to entire customer profile (not for a specific invoice or contract).
10	Under the Attachments tab, add any attachments relevant to the customer as an entity (not for a specific contract or invoice). Click Select files>find and click on the file you want to attach>click open>Successfully Uploaded! message displays. To add more than one attachment: Click Upload>find and click on the new file you want to attach>click open>Successfully Uploaded! message displays. To remove an attachment altogether, click the Trash Can icon.
11	Under the Contact Information tab, add a phone number(s) for the customer. Address and Phone is required. Select Add in the Phone section and enter the following information: • Phone Number – Enter the phone number for the customer including area code. • Phone Device – Select the appropriate device type. • Primary – Check the box if this is the primary number for the customer. • Use For – Select the X to the left of shipping; shipping should be removed from the Use For options. To add additional phone numbers for the customer, select Add. If multiple phone numbers are entered for a customer, one of those phone numbers needs to be marked as Primary.
12	Under the Contact Information tab, add an address(es) for the customer. Select Add in the Address section and enter the following information: • Address Line 1 – Enter the street address for the customer. • City – Enter the City for the customer. • State – Enter the State for the customer. • Zip Code – Enter the Zip Code for the customer. • Primary – Check the box as this is the primary address for the customer. Use For – Select the X to the left of shipping; shipping should be removed from the Use For options.

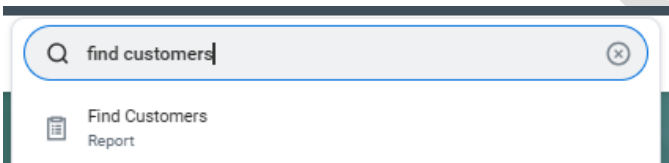
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	To add an additional address for the customer, select Add . If multiple addresses are entered for a customer, one of those addresses needs to be marked as Primary .
13	Under the Contact Information tab, add an email for the customer. Select Add in the Email section and enter the following information: • Email Address – Enter the main email address for the customer. • Use For – Select the X to the left of shipping; shipping should be removed from the Use For options. To add an additional email for the customer, select Add. If multiple emails are entered for a customer, one of those emails needs to be marked as Primary.
14	Under the Connection Map tab, update if invoices are being received from one customer but servicing of any information will be to a separate customer.
15	Under the Assigned Roles tab, update the fields if necessary.
16	Select Submit . The customer should now be created.
17	To add contacts for a customer, select the Customer to navigate back to the specific customer.
18	Under the Addresses and Contacts tab, select the Customer Contacts Subtab. Select the Add button.
19	Under the Name tab, enter the contact's first and last name. Under the Contact Information tab, enter the contact's phone number, address, and email along with the related type by selecting the add button within each of the sections. An email address is required for a contact to be identified as a billing contact. Select OK to return to the Add Contact page. If there are additional contacts for this customer, select the Add button. When all contacts have been set up, select Done.
20	From the Main Customer view under the Addresses and Contacts tab, select the Customer Contacts Subtab. Select the Set-Up Bill-To Contacts button. Only contacts identified as a Bill-To Contact are available for selection on a customer invoice. Primary Bill-To Contact – select the box for the contact who is the primary contact.

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	Default Bill-To Contact – select the box related to the contact if this contact should default onto customer invoices as the bill-to contract. Email Documents – Select Customer Invoice. Select OK. The Customer Contacts tab will identify the contact defined as Bill-To Contacts.
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Maintain Customer

1	In the Search bar, enter Find Customers. In the search results, select the Find Customers Report. 
2	The Find Customers report displays. Use the fields to enter search criteria or select OK to display all customers.
3	The list of customers displays. Search for and select the Customer to maintain.
4	From the Customer's Overview page, actions are available using the tabs and subtabs. Each subtab includes Edit functions. Include a Reason and Reason description in the customer header.
5	Select a subtab. Select Edit to make changes to the fields.
6	Complete all required fields as appropriate. Select Submit.