



UNIVERSITY OF
South Carolina

**Office of the Controller
Miscellaneous Accounts Receivable
Creating a New Customer**

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I. Create a New Customer

To create a new customer in PeopleSoft Finance, use the navigation:

Main Menu > Customers > Customer Information > Create Customer Information

Step 1: Click the **Add a New Value** button. The SetID will always be MSCAR.

The screenshot shows the 'Create Customer Information' page in PeopleSoft Finance. The breadcrumb navigation is 'Main Menu > Customers > Customer Information > Create Customer Information'. The page title is 'General Information'. Under 'Find an Existing Value', there is a search criteria section. The '*SetID' field is set to 'MSCAR' and is highlighted with a red box. Other search criteria include 'Customer ID' (begins with), 'Name 1' (begins with), 'Name 2' (begins with), and 'Customer Status' (=). An 'Add a New Value' button is highlighted with a red box.

Step 2: From the next screen, click the **Add** button.

The screenshot shows the 'Add a New Value' section of the 'Create Customer Information' page. The '*SetID' field is set to 'MSCAR' and the '*Customer ID' field is set to 'NEXT'. An 'Add' button is highlighted with a red box.

Step 3: Under the **General Info** tab enter the name of the customer in the **Name 1** field. The **Name 2** field can be used to enter an additional name for the customer.

Step 4: In **Roles** section, be sure to check the Bill To Customer, Ship To Customer, Sold To boxes. The Correspondance Customer, Remit From Customer, and Corporate Customer boxes should auto populate.

The screenshot shows the 'Create Customer Information' form. The 'General Info' tab is selected. The 'Name 1' field is highlighted with a red box and contains 'Maggie Todd'. The 'Roles' section is also highlighted with a red box and contains the following checked items:

- Bill To Customer
- Ship To Customer
- Sold To Customer
- Correspondence Customer
- Remit From Customer
- Corporate Customer

Step 5: In **Support Teams** section, the **Default** box should be auto checked.

Team Code	Default	Description
USCSP	<input checked="" type="checkbox"/>	USCSP Support Team

Step 6: In the **Address Locations**, add the street address in the **Description** field for **Location 1**. Check boxes (6 total) for Bill To, Ship To, Sold To and 3 Primary boxes.

The screenshot shows the 'Address Locations' section. The 'Location 1' field is highlighted with a red box and contains '1'. The 'Description' field is highlighted with a red box and contains '1000 Main Street'. The 'Roles' section is also highlighted with a red box and contains the following checked items:

- Bill To
- Ship To
- Sold To
- Primary
- Primary
- Primary

Step 7: In the **Address Details** section, duplicate the street address in **Address 1** field, (can copy from **Description** box above) as well as the **City**, **State**, and **Postal Code**.

The screenshot shows the 'Address Details' form in the University of South Carolina system. The form is titled 'Address Details' and includes a search bar and navigation controls. The form fields are as follows:

- *Effective Date:** 11/06/2025
- *Status:** Active
- Language Code:** English
- Country:** USA (United States)
- Address 1:** 1000 Main Street
- Address 2:** (empty)
- Address 3:** (empty)
- City:** Columbia
- County:** (empty)
- State:** SC
- Postal:** 29205

The Address 1, City, State, and Postal fields are highlighted with red boxes. At the bottom of the form, there are buttons for 'Save', 'Notify', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History'. A 'General Info Links' dropdown menu is also visible.

Step 8: Click the **Save** button to assign a customer ID.

This screenshot is identical to the previous one, showing the 'Address Details' form. The only difference is that the 'Save' button at the bottom left of the form is now highlighted with a red box, indicating it should be clicked to complete the step.

Step 9: Once saved, a Customer ID is assigned. The customer **Status** will be **Inactive** until the submission is approved and activated by the Controller’s Office. An email will be sent to the Controller’s Office stating that a customer was created and is awaiting approval.

The screenshot shows the 'Create Customer Information' page in the University of South Carolina system. The breadcrumb trail is 'Customers > Customer Information > Create Customer Information'. The page title is 'All Search' with an 'Advanced Search' link. The user is logged in as 'User 1' and has a notification bell icon. The page has tabs for 'General Info', 'Bill To Options', 'Ship To Options', 'Sold To Options', and 'Miscellaneous General Info'. The 'General Info' tab is active. The form displays the following information: SetID: MSCAR, Customer ID: CST0000616, General Info Links: ...More. The *Status is set to 'Inactive' (highlighted with a red box). Inactive As Of: 11/06/2025. Level: Regular. *Date Added: 11/06/2025, *Since: 01/01/1901. *Type: User 1. *Name 1: Maggie Todd, *Short Name: Maggie Tod. Name 2 is empty. Currency Code: USD, Rate Type: CRRNT.

Step 10: Once approved by the Controller’s Office, the status will reflect as **Active** and an email will be sent to the user confirming activation for billing.

The screenshot shows the same 'Create Customer Information' page as above, but the *Status is now set to 'Active' (highlighted with a red box). All other information remains the same: SetID: MSCAR, Customer ID: CST0000616, Inactive As Of: 11/06/2025, Level: Regular, *Date Added: 11/06/2025, *Since: 01/01/1901, *Type: User 1, *Name 1: Maggie Todd, *Short Name: Maggie Tod, Name 2 is empty, Currency Code: USD, Rate Type: CRRNT.

II. Create a Customer Contact

NOTE: A customer contact must be added to a customer before they can be invoiced.

To create a customer contact in PeopleSoft Finance, use the navigation:

Main Menu > Customers > Create Customer Contacts

Step 1: Click the **Add a New Value** button. The SetID will always be MSCAR.

The screenshot shows the 'Create Customer Contacts' page in PeopleSoft Finance. The breadcrumb navigation is 'Main Menu > Customers > Create Customer Contacts'. The page title is 'Contact Info'. Under 'Find an Existing Value', there is a search criteria section. The 'Add a New Value' button is highlighted with a red box. The search criteria form includes the following fields:

- *SetID: MSCAR (with a search icon)
- Contact ID: begins with [] (with a search icon)
- Contact Name: begins with []
- Customer SetID: begins with [] (with a search icon)
- Customer ID: begins with [] (with a search icon)

Step 2: Click the **Add** button.

The screenshot shows the 'Create Customer Contacts' page in PeopleSoft Finance. The breadcrumb navigation is 'Main Menu > Customers > Create Customer Contacts'. The page title is 'Contact Info'. Under 'Add a New Value', there is a search criteria section. The 'Add' button is highlighted with a red box. The search criteria form includes the following fields:

- *SetID: MSCAR (with a search icon)
- *Contact ID: NEXT (with a search icon)

Step 3: On the **Contact Information** page in the Contact Information section, enter the contact's name in the **Name** field and carefully enter the contact's email address in the **Email Address** field to ensure the invoice is successfully received.

Step 4: Click the **Contact Customers** link at the bottom left of the page.

The screenshot shows the 'Contact Information' page with the 'Maintain Contacts' section. The 'Name' field is 'Maggie Todd' and the 'Email Address' field is 'mgtodd@mailbox.sc.edu'. The 'Contact Customers' link is highlighted with a red box. The page includes a search bar, navigation links, and a 'Save' button.

Step 5: In the **Contact Customer** section, click the **Customer ID Lookup** button, which looks like the magnifying glass icon.

The screenshot shows the 'Contact Customers' section with a table of customer information. The 'Customer ID' field is highlighted with a red box and a magnifying glass icon. The table has columns for Customer SetID, Customer ID, Customer Name, Location, Primary Bill To, Primary Ship To, and Primary Sold To. The page includes a search bar, navigation links, and a 'Save' button.

*Customer SetID	*Customer ID	Customer Name	*Location	Primary Bill To	Primary Ship To	Primary Sold To		
MSCAR				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-

Step 6: Enter the Customer ID number in the **Customer ID** field.

Step 7: Click the **Search** button.

Step 8: Click the **Customer ID or Name 1** hyperlink. This will populate the Customer ID field in the Link to Contact to Customer section of the page.

The screenshot shows a 'Look Up Customer ID' dialog box overlaid on a web page. The dialog has the following fields and controls:

- Customer SetID:** MSCAR
- Customer ID:** begins with CST0000152
- Name 1:** begins with
- Buttons:** Search, Clear, Cancel, Basic Lookup
- Search Results:** View 100, 1-1 of 1
- Search Results Table:**

Customer ID	Name 1
CST0000152	Carowinds

Step 9: Click the **Location Lookup** button and select the correct **Location** for the contact. This will populate the Location field in the Link Contact to Customer section of the page.

The screenshot shows a 'Look Up Location' dialog box overlaid on a web page. The dialog has the following fields and controls:

- Customer SetID:** MSCAR
- Customer ID:** CST0000152
- Description:** begins with
- Buttons:** Search, Clear, Cancel, Basic Lookup
- Search Results:** View 100, 1-1 of 1
- Search Results Table:**

Address Sequence Number	Description
1	PO Box 410289

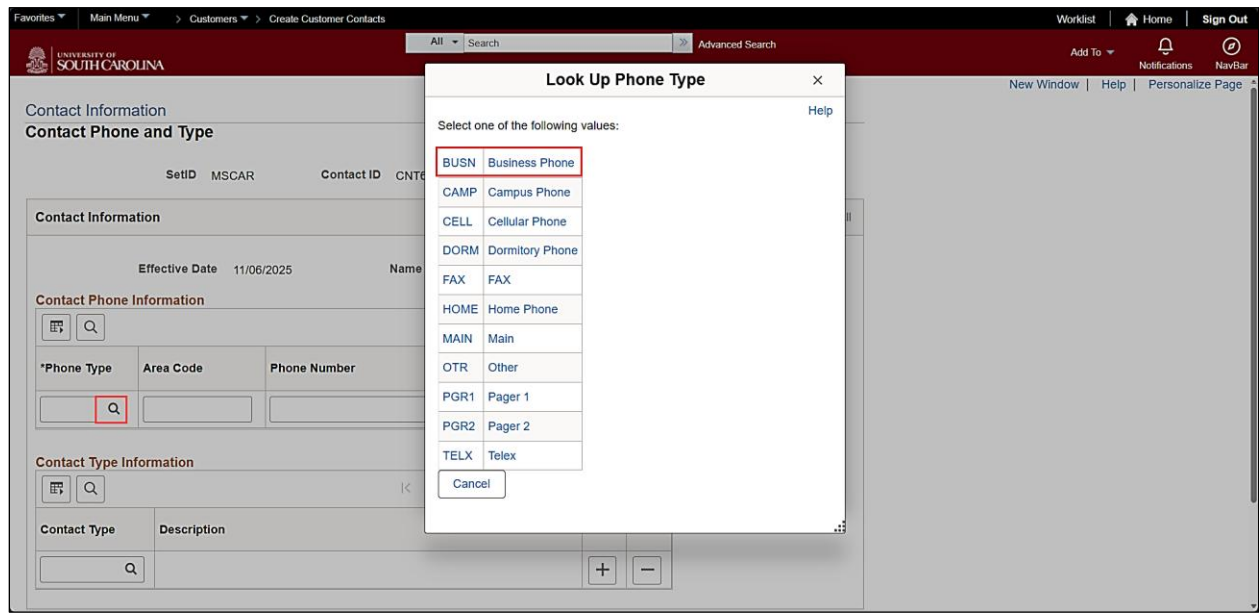
Step 10: Click the Save button.

The screenshot shows the 'Create Customer Contacts' page in the University of South Carolina system. The page title is 'Contact Customers'. The breadcrumb trail is 'Customers > Create Customer Contacts'. The page contains a form for entering contact information. The 'Effective Date' is 11/06/2025 and the 'Name' is Maggie Todd. Below this is a section titled 'Link Contact to Customer' with a search icon and a table. The table has columns for *Customer SetID, *Customer ID, Customer Name, *Location, Primary Bill To, Primary Ship To, and Primary Sold To. The first row contains the values: MSCAR, CST0000152, Carowinds, 1, PO Box 410289, and three checked boxes. At the bottom left, the 'Save' button is highlighted with a red box. Other buttons include 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

Step 11: Click the Contact Phone and Type link at the bottom left of the page.

This screenshot is identical to the one above, showing the 'Create Customer Contacts' page. In this view, the 'Contact Phone and Type' link in the bottom left corner is highlighted with a red box. The rest of the page content, including the form fields, table, and other buttons, remains the same.

Step 12: On this page, click the **Phone Type Lookup** button and select the appropriate type from the list.



Step 13: Enter the **Area Code** and **Phone Number** in the appropriate fields.

Step 14: Click the **Save** button.

