Office of the Controller
Miscellaneous Accounts Receivable
Creating a New Customer

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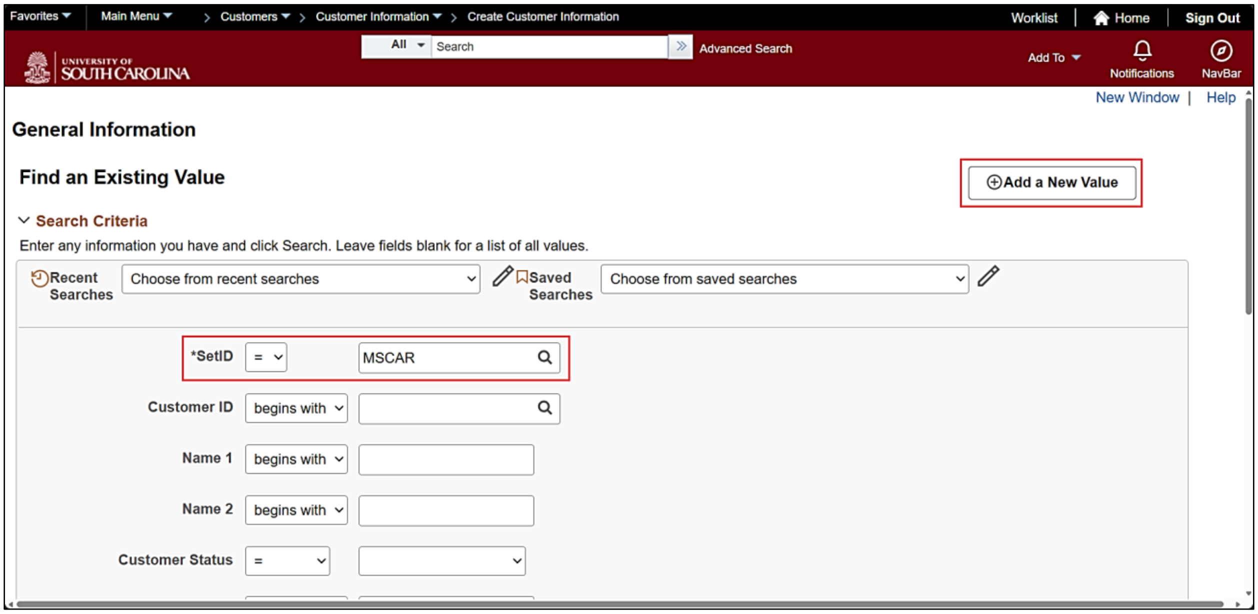
I. Create a New Customer

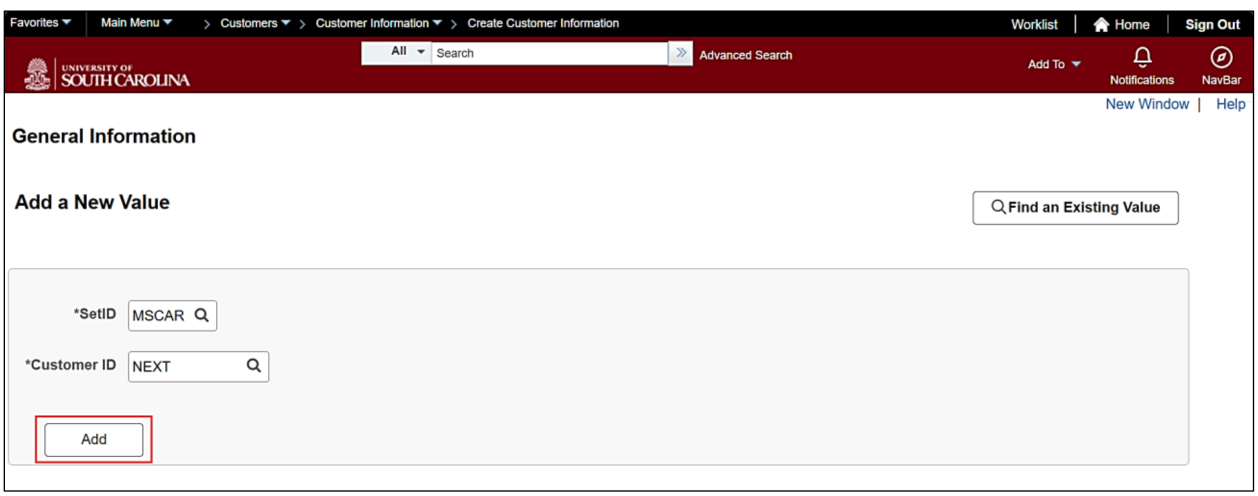
To create a new customer in PeopleSoft Finance, use the navigation:

Main Menu > Customers > Customer Information > Create Customer Information

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

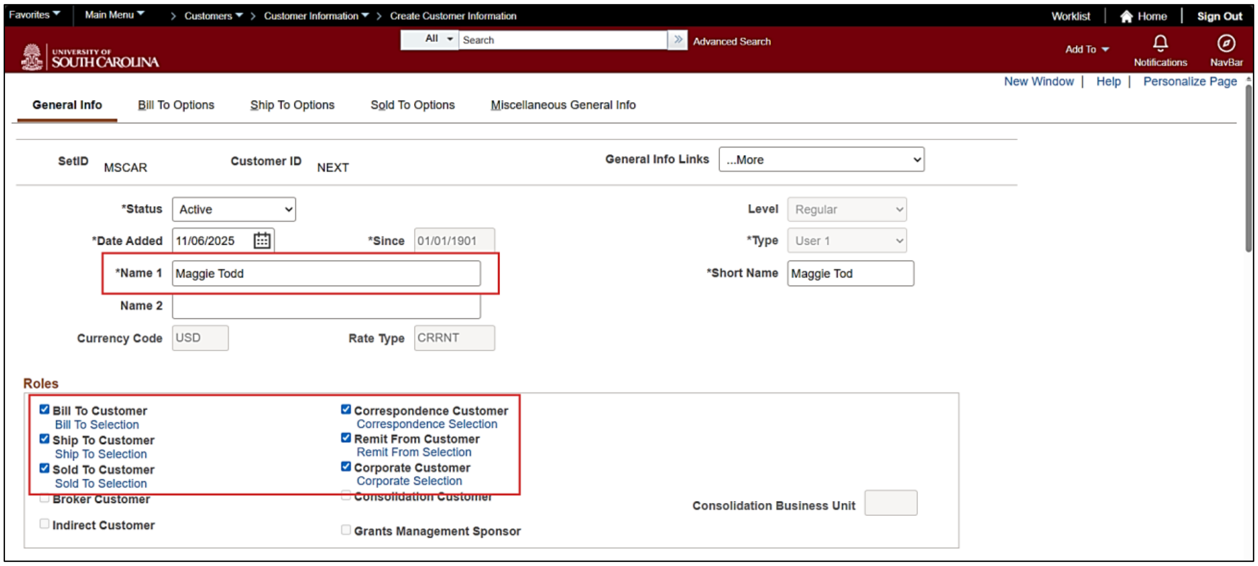


Step 2: From the next screen, click the **Add** button.

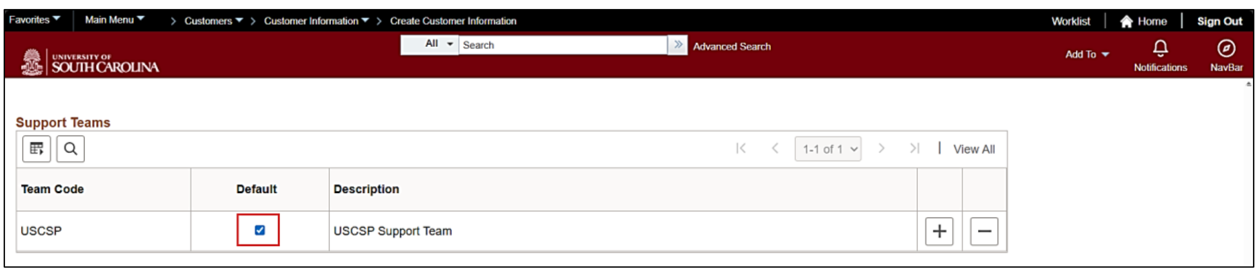


Step 3: Under the **General Info** tab enter the name of the customer in the **Name 1** field. The **Name 2** field can be used to enter an additional name for the customer.

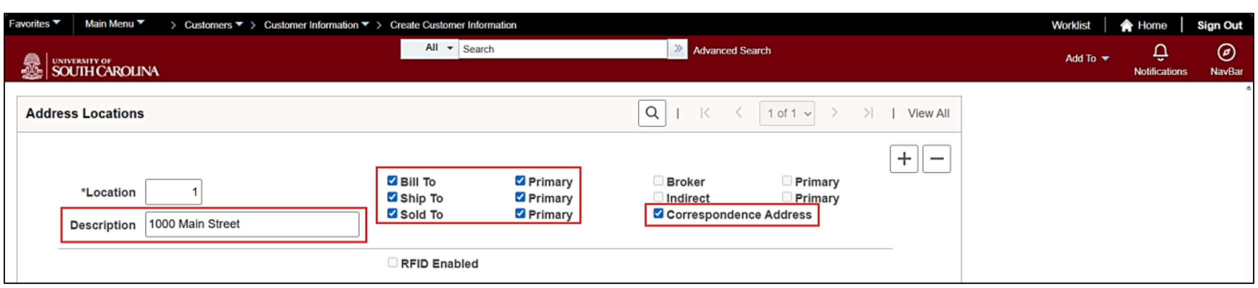
Step 4: In **Roles** section, be sure to check the Bill To Customer, Ship To Customer, Sold To boxes. The Correspondance Customer, Remit From Customer, and Corporate Customer boxes should auto populate.



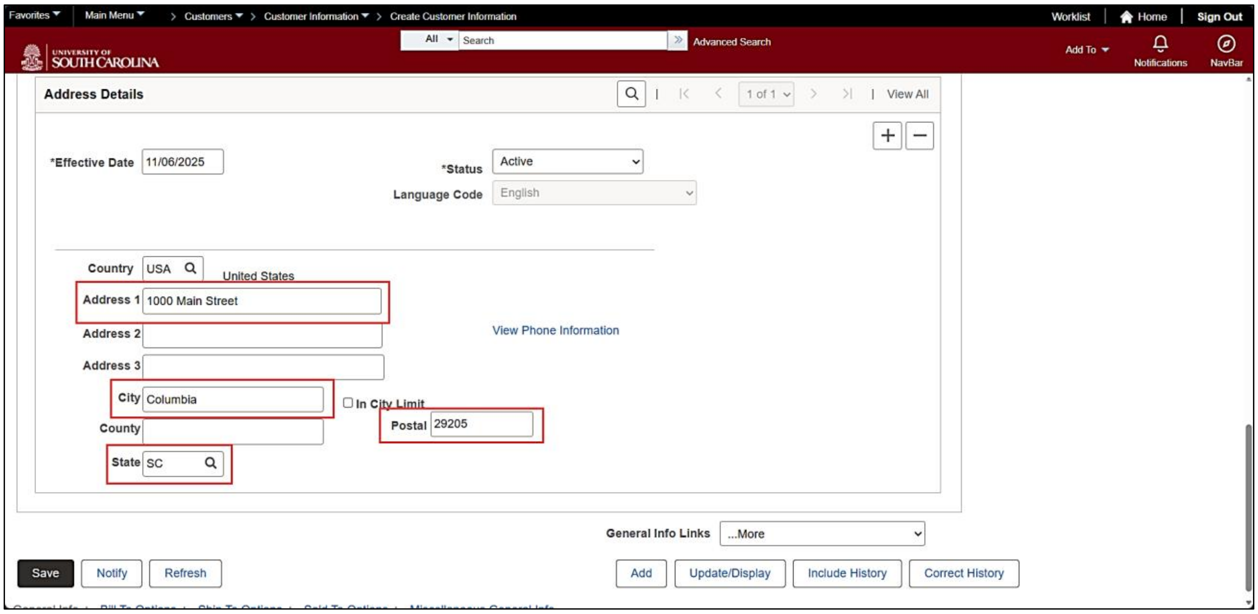
Step 5: In **Support Teams** section, the **Default** box should be auto checked.



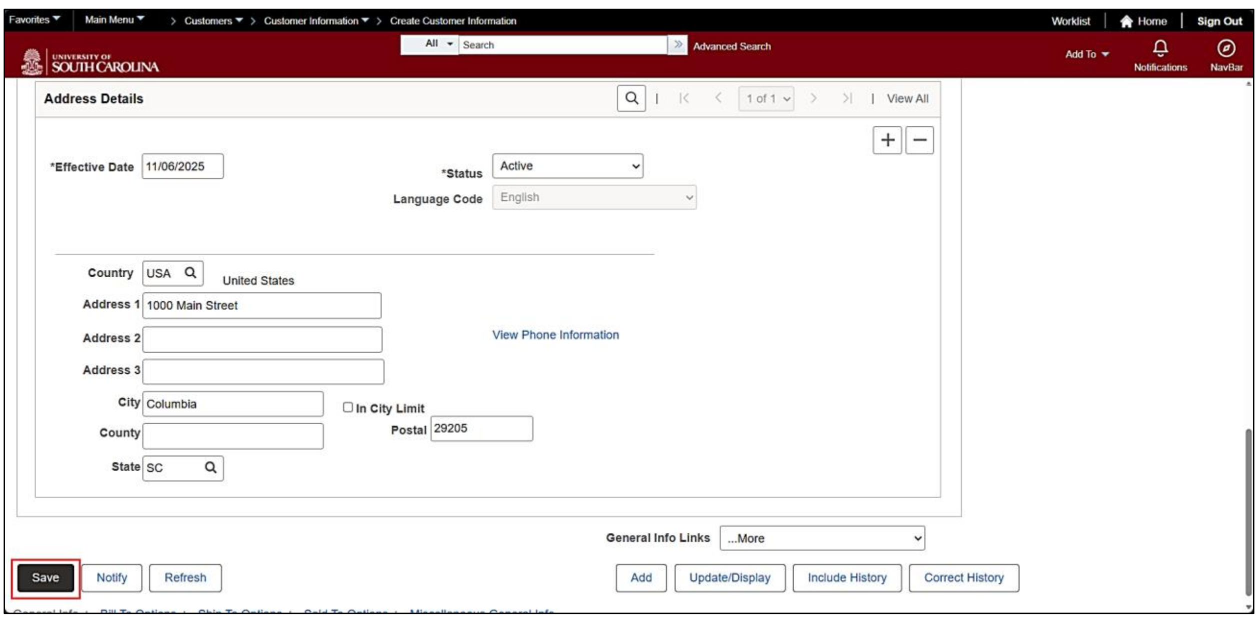
Step 6: In the **Address Locations**, add the street address in the **Description** field for **Location** 1. Check boxes (6 total) for Bill To, Ship To, Sold To and 3 Primary boxes.



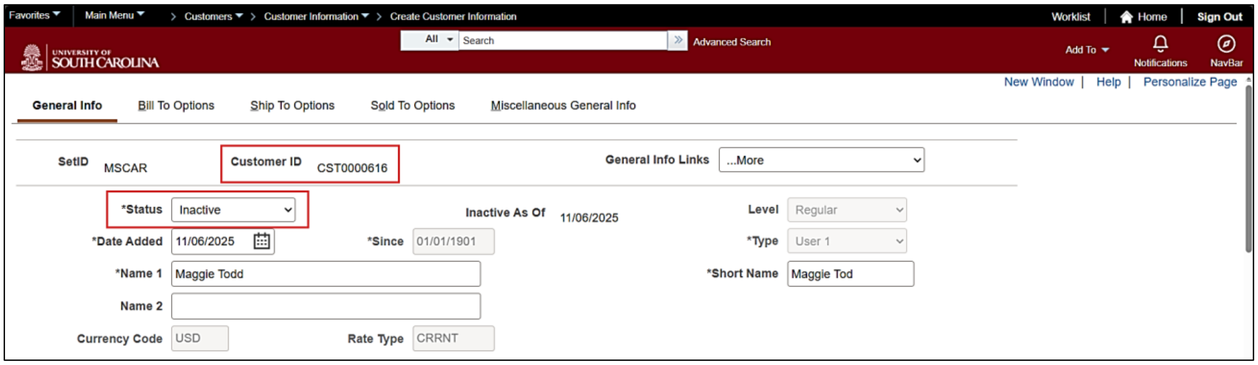
Step 7: In the **Address Details** section, duplicate the street address in **Address 1** field, (can copy from **Description** box above) as well as the **City**, **State**, and **Postal Code**.



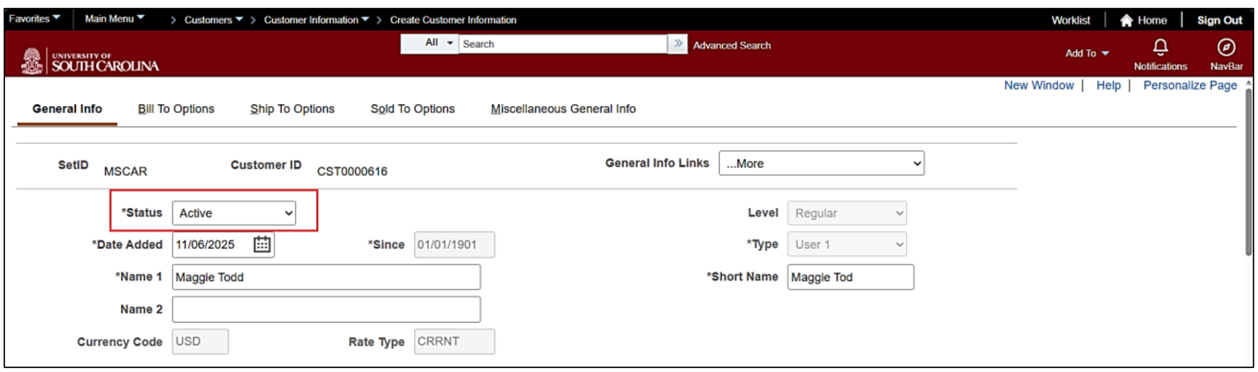
Step 8: Click the **Save** button to assign a customer ID.



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.



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.



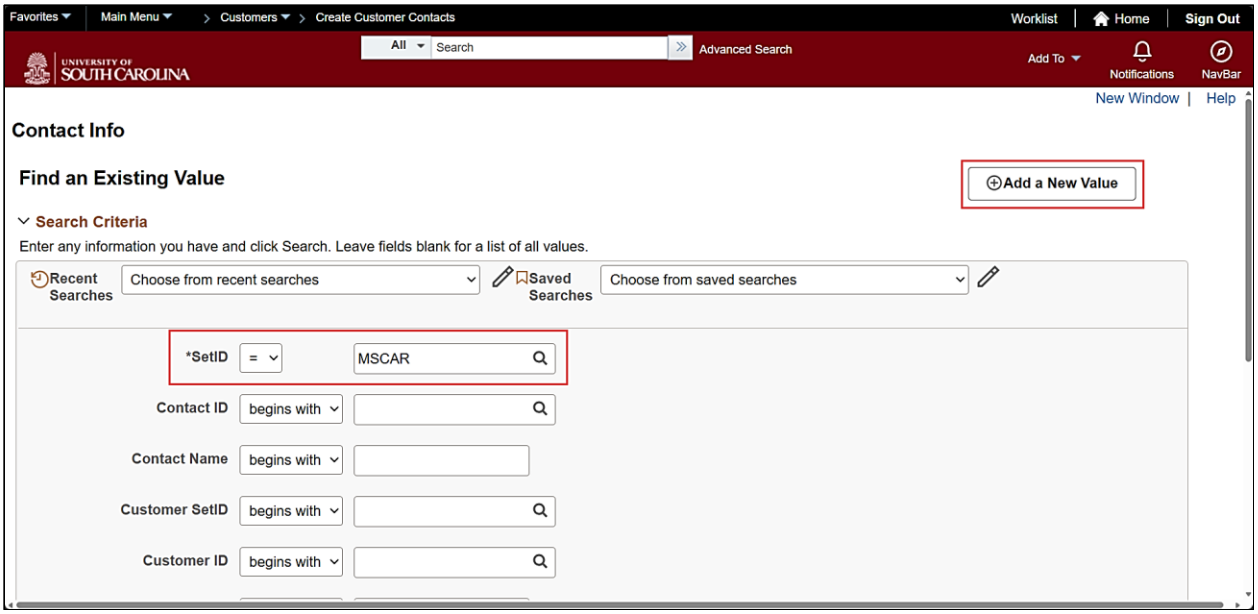
II. Create a Customer Contact

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

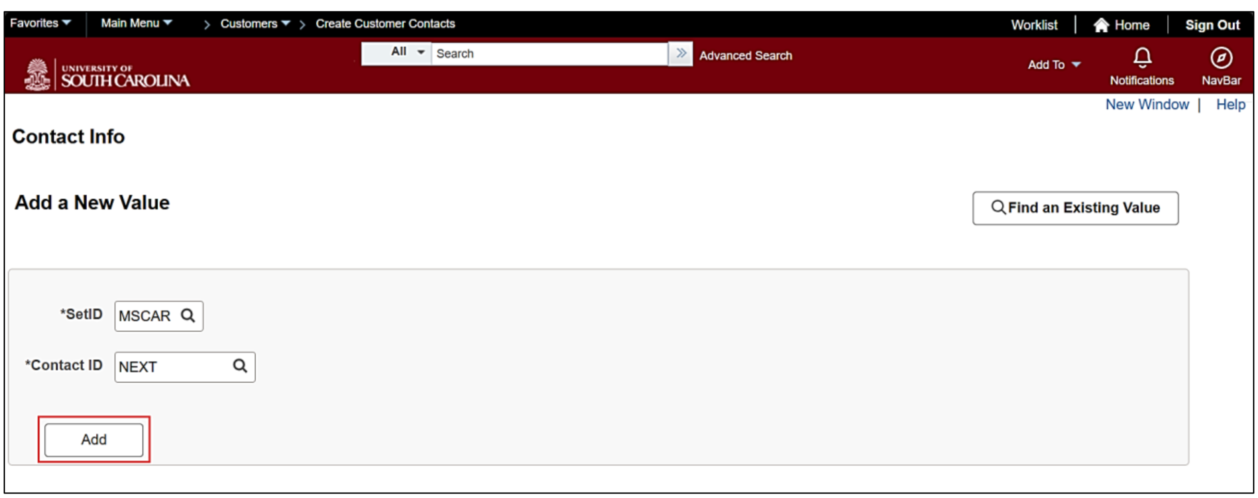
To create a customer contact in PeopleSoft Finance, use the navigation:

Main Menu > Customers > Create Customer Contacts

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

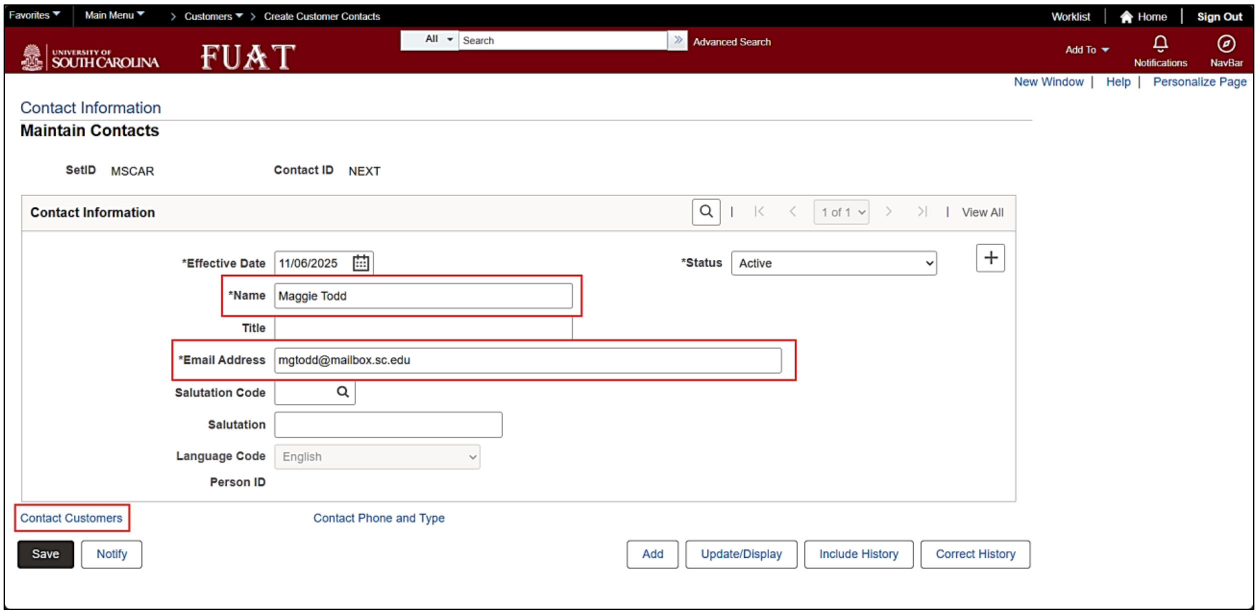


Step 2: Click the **Add** button.

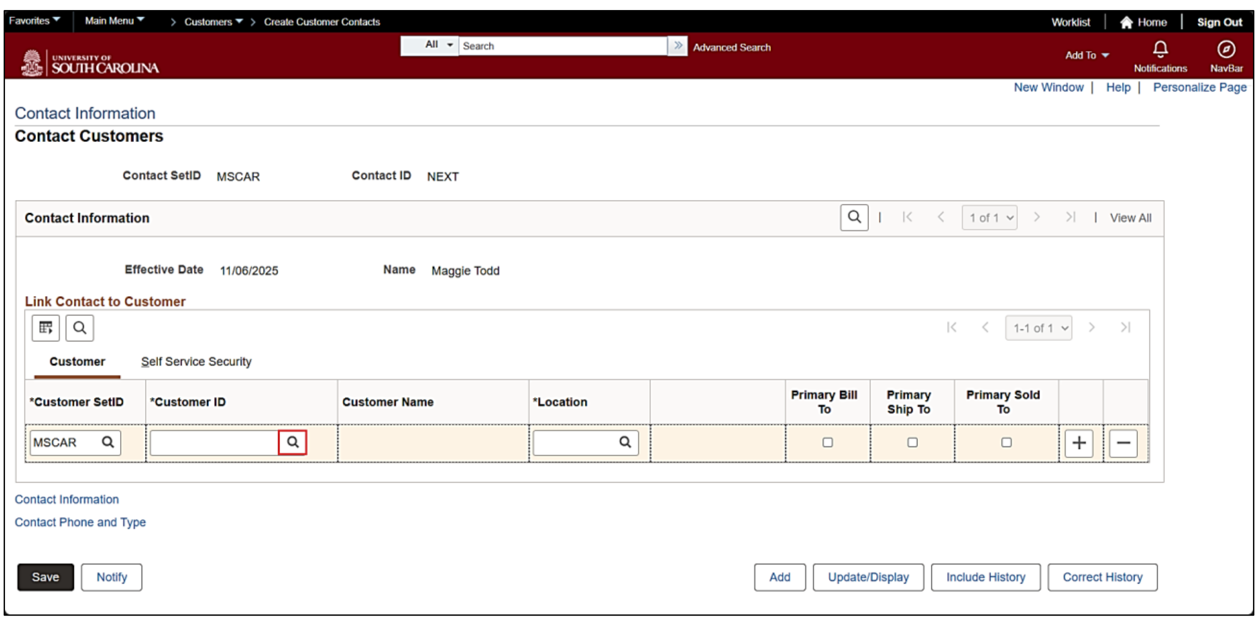


Step 3: On the **Contact Information** page in the Contact Information section, enter the contact's name in the **Name** field and carefully enter the contact's email address in the **Email Address** field to ensure the invoice is successfully received**.**

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



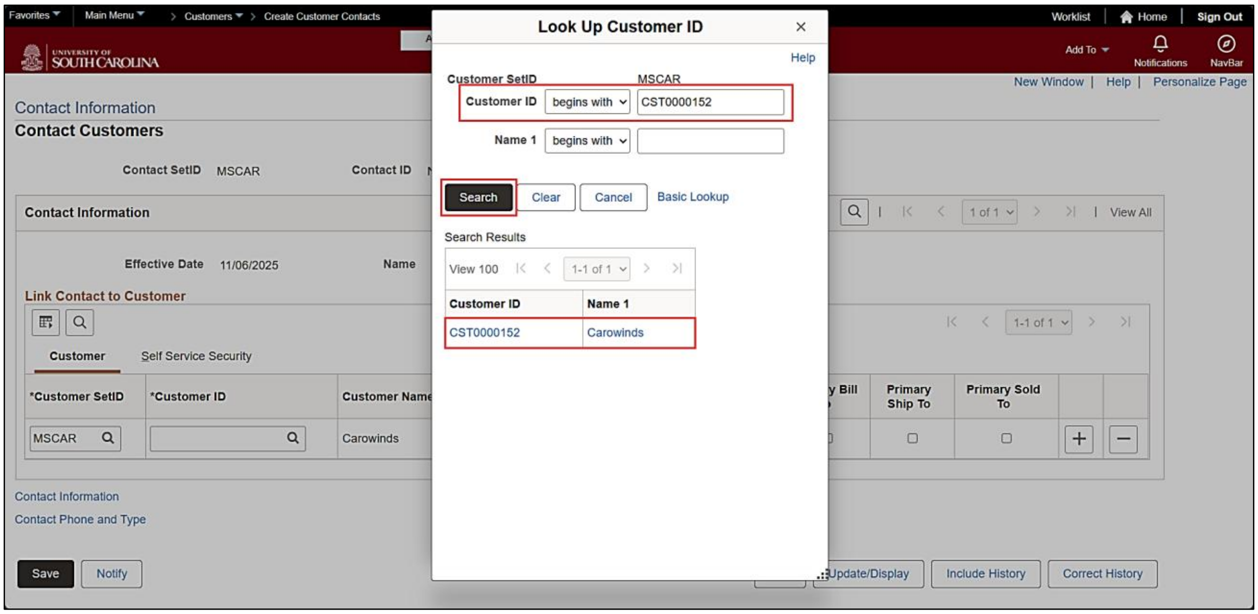
Step 5: In the **Contact Customer** section, click the **Customer ID Lookup** button, which looks like the magnifying glass icon.



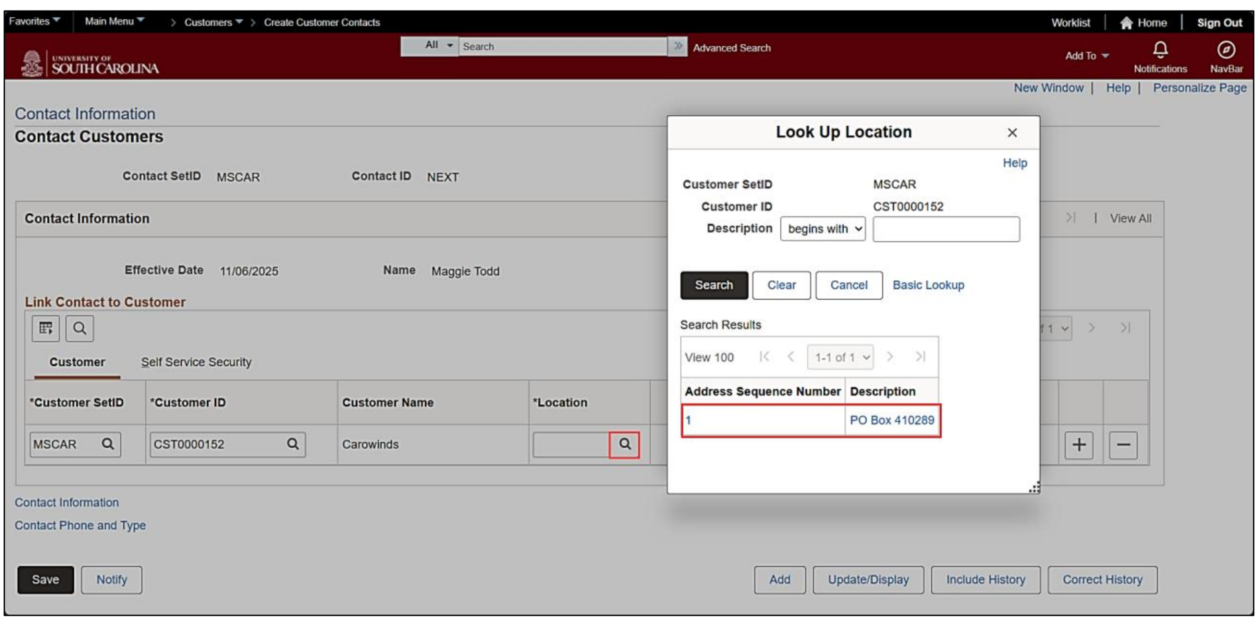
Step 6: Enter the Customer ID number in the **Customer ID** field.

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

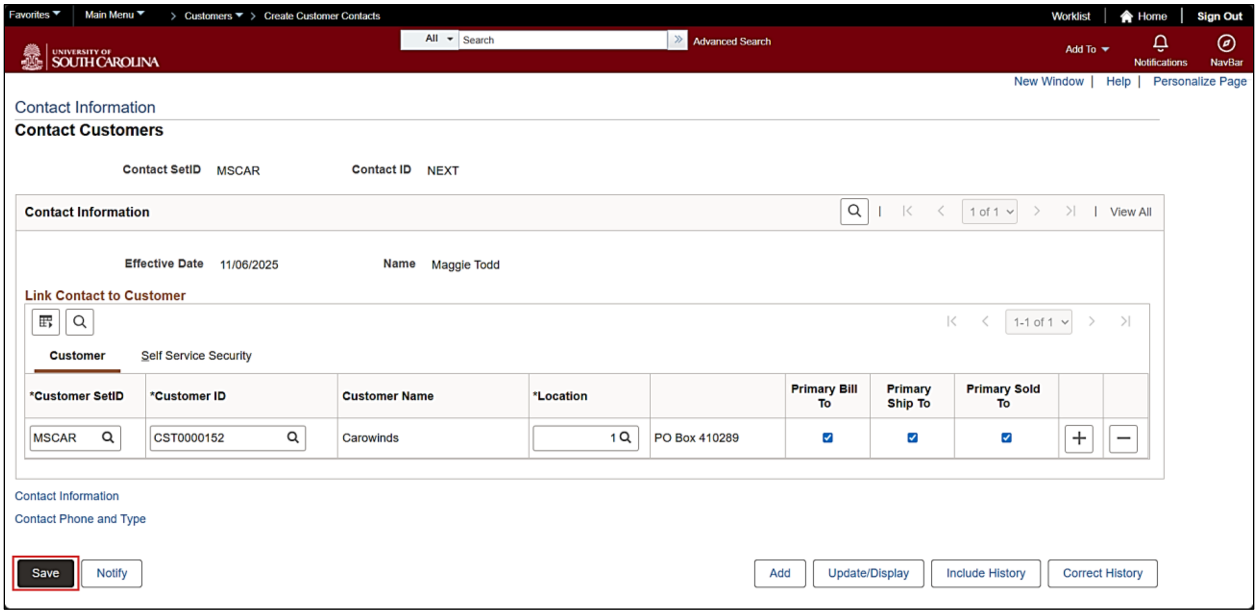
Step 8: Click the **Customer ID or Name 1** hyperlink. This will populate the Customer ID field in the Link to Contact to Customer section of the page.



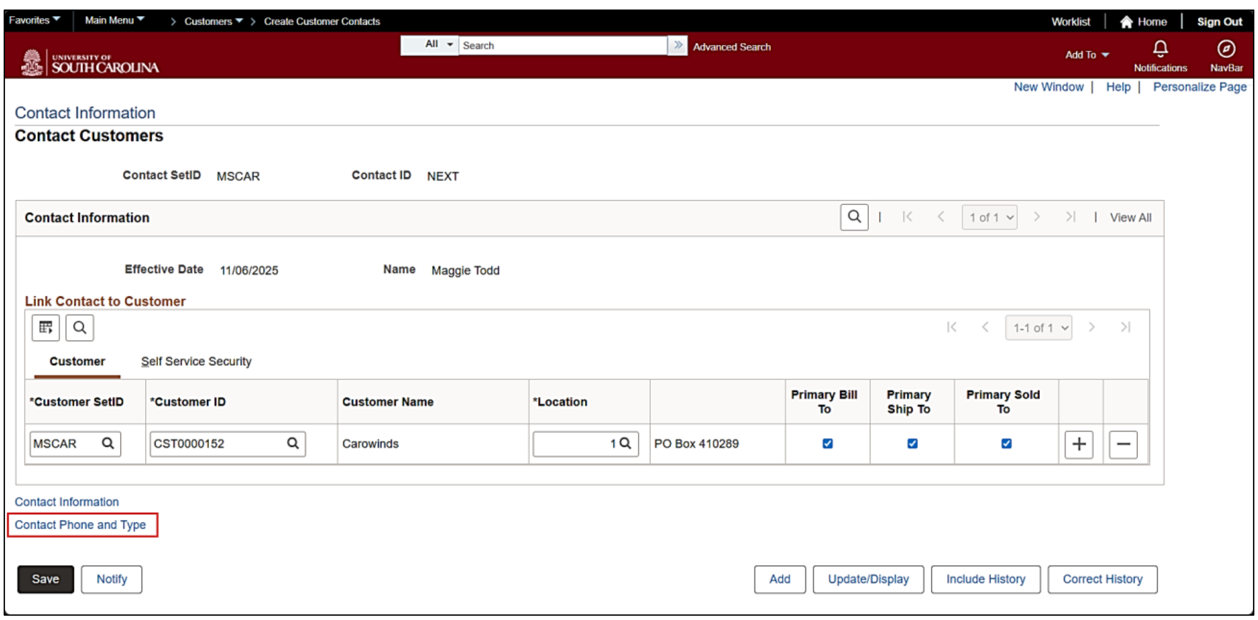
Step 9: Click the **Location Lookup** button and select the correct **Location** for the contact. This will populate the Location field in the Link Contact to Customer section of the page.



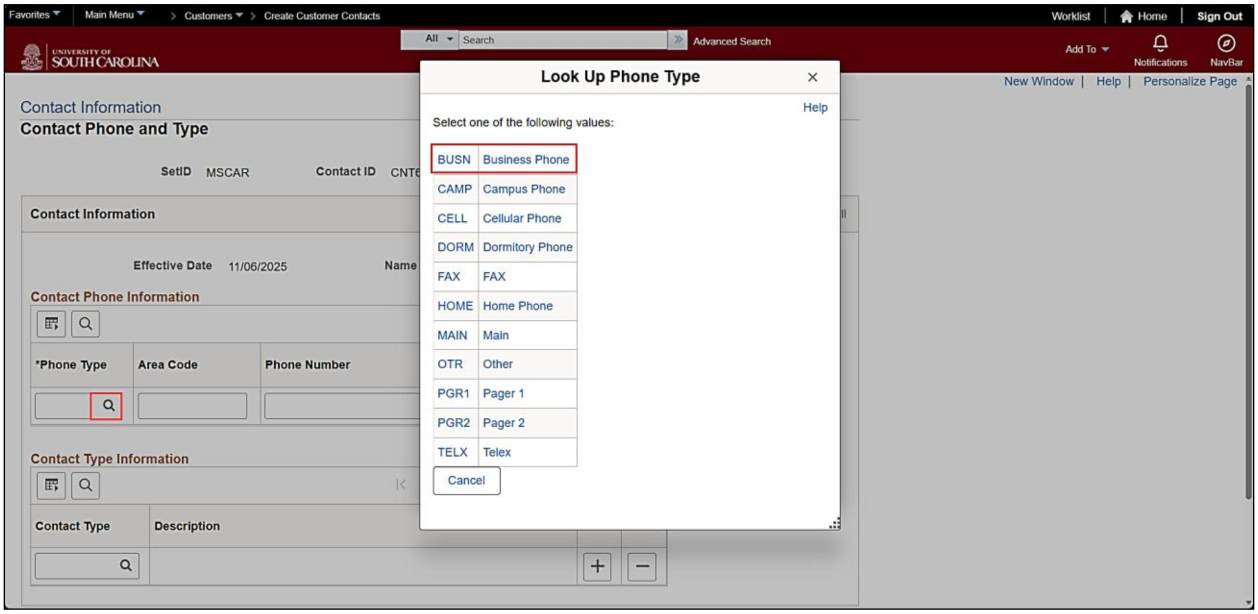
Step 10: Click the **Save** button.



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



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.