New Customer Request and Amending Customers

PRIFYSGOL ABERYSTWYTH UNIVERSITY

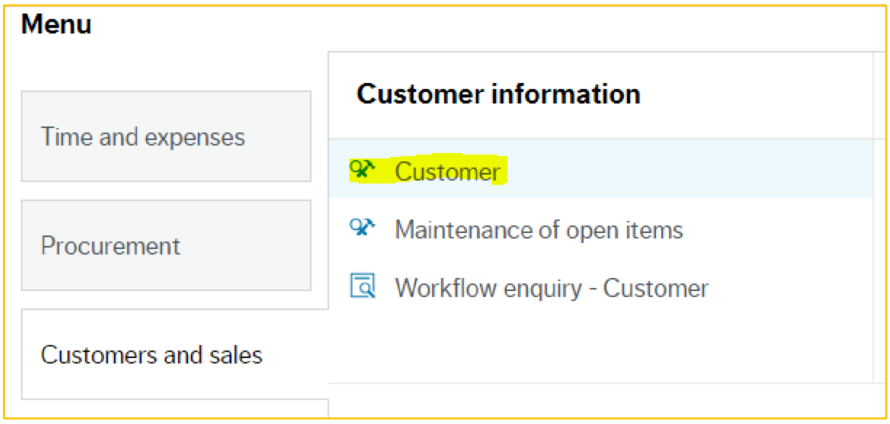
Date: July 26

Dept: Finance

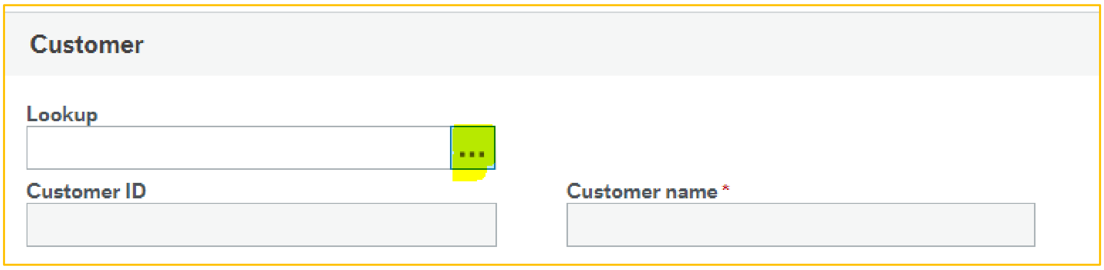
Contents

1. Check Customer

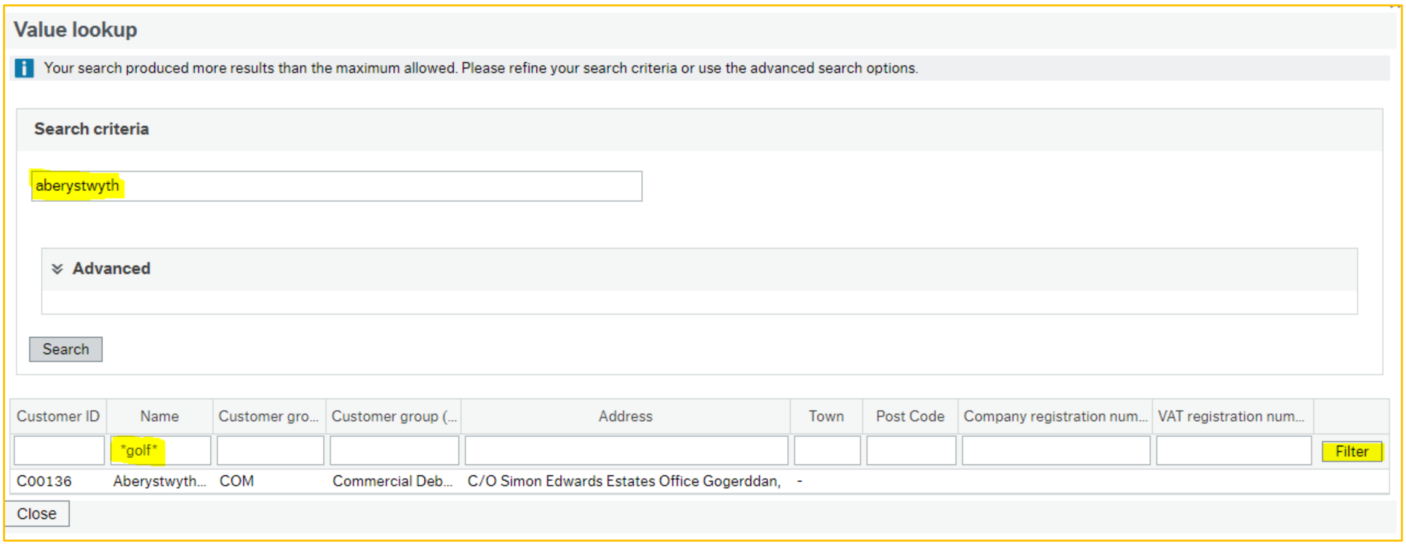
Before requesting a new Customer, you should check they do not already exist, from the menu, click on Customer and Sales and then Customer:



Click on the box with the three dots to search for existing customers:



This opens the following search box:



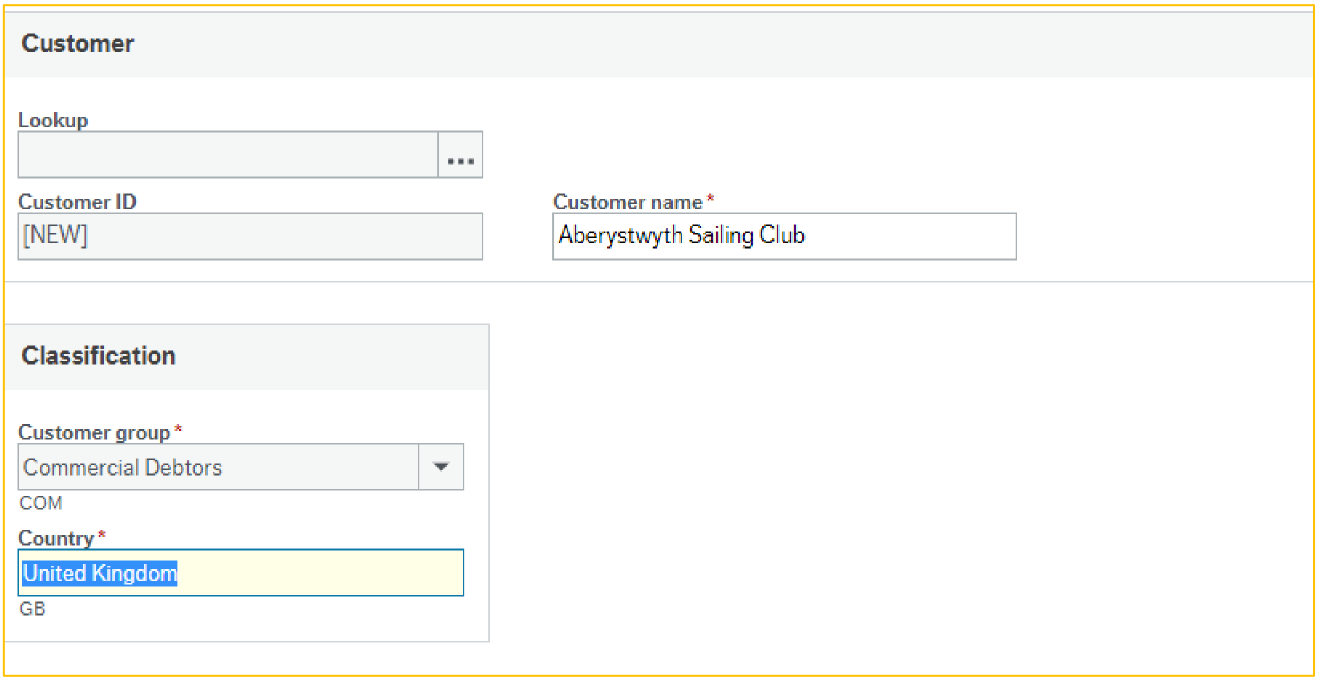
Enter text in the search criteria and click Search. If you get too many results, enter some more details in the white boxes on the fields below to narrow down the criteria, then click on Search again, if you still have too many results you can filter on the results by adding more text in the fields and clicking on the filter button. Use * either side of the text if it is part of a name. Click on the Close button to exit the search.

If you are happy, you cannot find the customer, then you can request a new one following the instructions below.

2. Creating a New Customer

Click on the NEW button at the *bottom* of the screen:

2.1. Customer tab

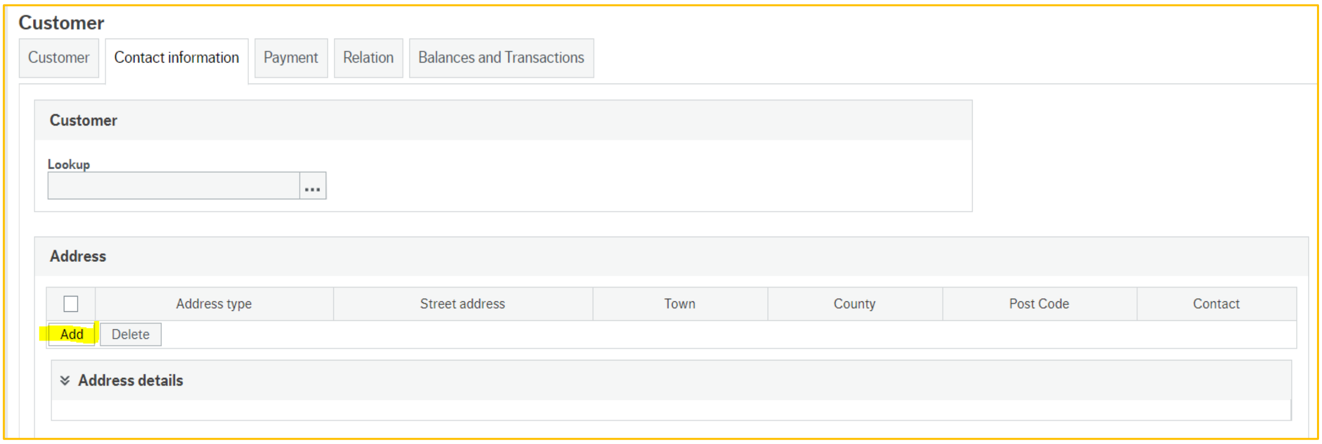


Customer ID: TAB over this field **(Do not amend from [NEW])**

Customer Name: Enter the name of the customer, do not use abbreviations. For individuals, use first name followed by surname, i.e. John Smith. Use Title Case, not block capitals.

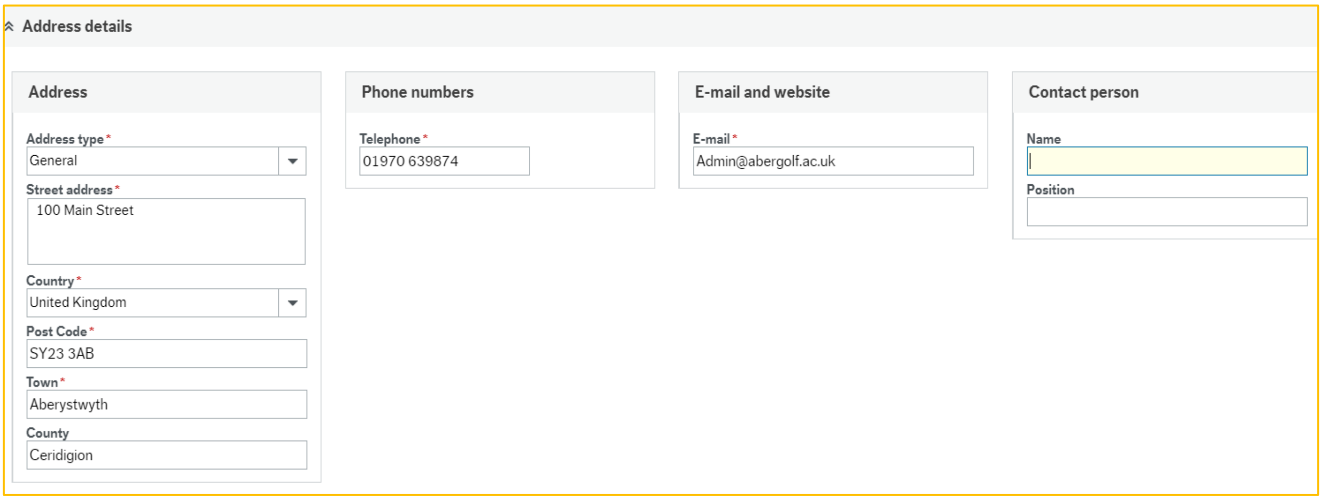
Country: This defaults to the UK, start typing the country name if outside the UK to select the correct country.

2.2. Contact information tab



There are several fields that are mandatory. These are needed in the first instance to send the invoice to the customer, and if the customer does not pay the invoice on time they are used in the reminder/debt chasing process.

To open the address fields to complete click on the Add button.



Address Type: This defaults to general, tab to the next field

Street Address: This is a mandatory field, enter the street name and, if a long address, you may need to add an address line 2 in here

Country: Enter the country where the customer address is, this may be different from the field completed on the first tab.

Post Code: This is a mandatory field, enter the post code

Town: This is a mandatory field, enter the Town

County: This is not mandatory, for short addresses where you have already added the county in the town field, leave this blank, otherwise enter the county.

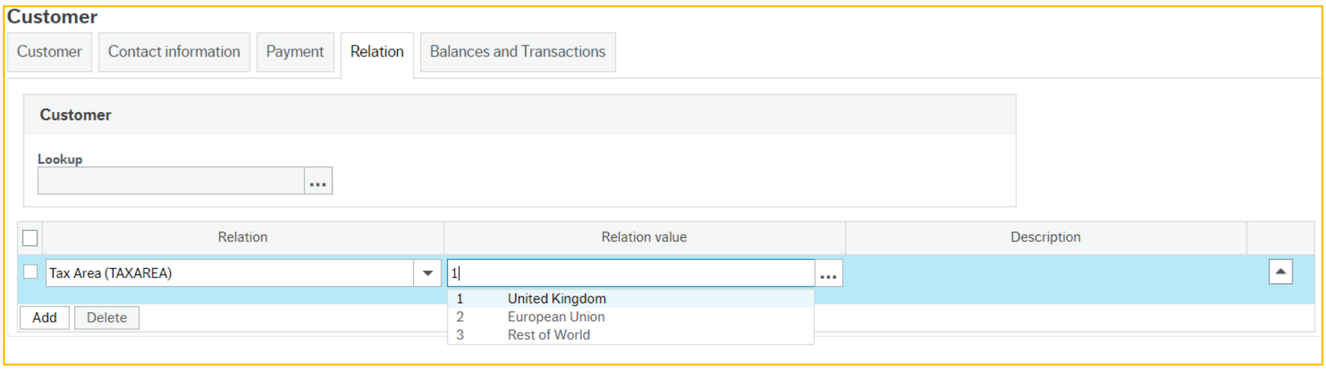
Telephone Number: This is required for debt chasing purposes and is a mandatory field.

Email: This is required for issuing invoices and debt chasing purposes and is a mandatory field. Wherever possible use generic email addresses rather than an individual within the company (i.e. Accounts@....). If you do not know the email address you must request it from the customer. Failure to complete a valid email address will result in the customer request being returned to you for completion.

Contact name: You may enter the contact details of someone at the customer if you have one.

You may need to scroll back to the top of the screen to see the tabs.

2.3. Relation tab

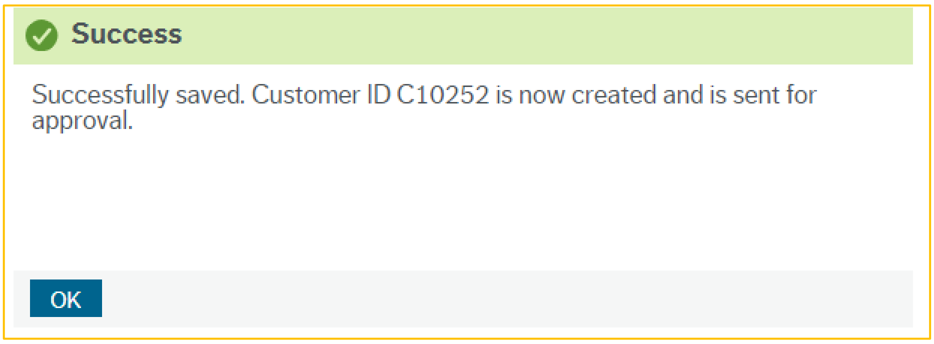


Tab past the field headed Relation to the Relation Value field

Tax Area: This is used in VAT reporting, either type in the one you need or type two spaces and select from the list. The valid values are 1 UK, 2 EU (Excluding UK) or 3 Rest of world.

2.4. Saving a new customer

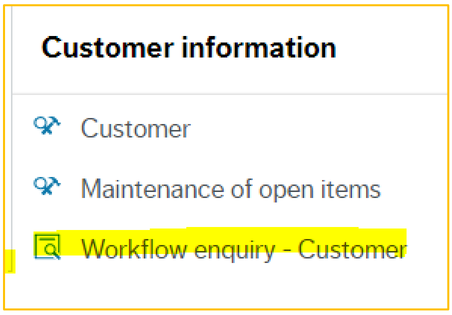
Once you are happy with your new customer, please press the save button at the bottom of the screen. This will provide you a popup of the new customer ID:

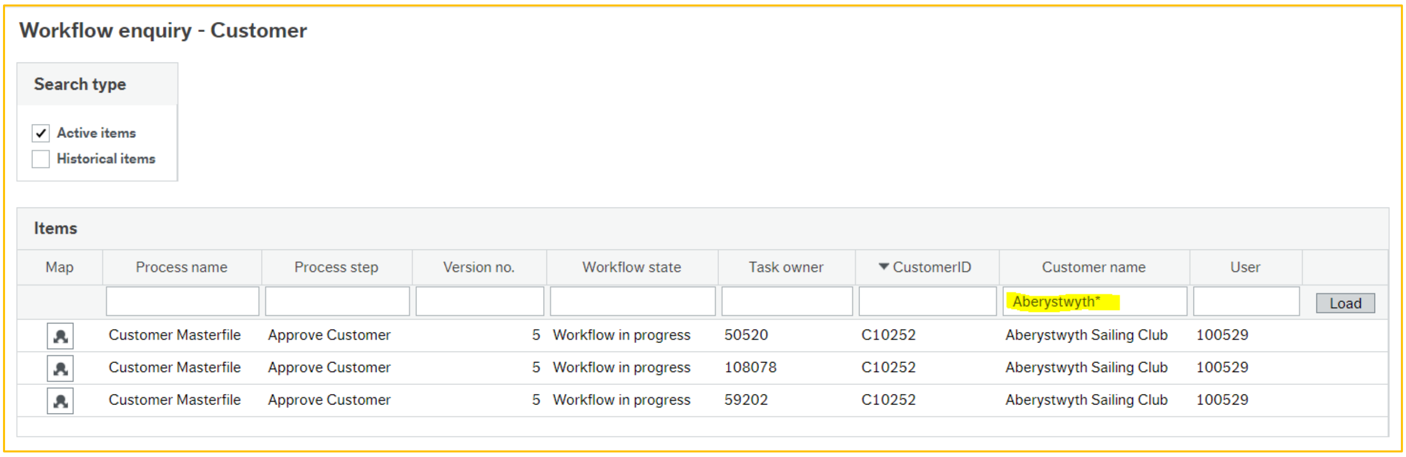


Your request has been submitted to the Finance Department for approval. You cannot raise an invoice on the customer until it has been approved.

3. New Customer Request Status

If you want to check the customer has been sent for approval and who it is with you can use the workflow enquiry:



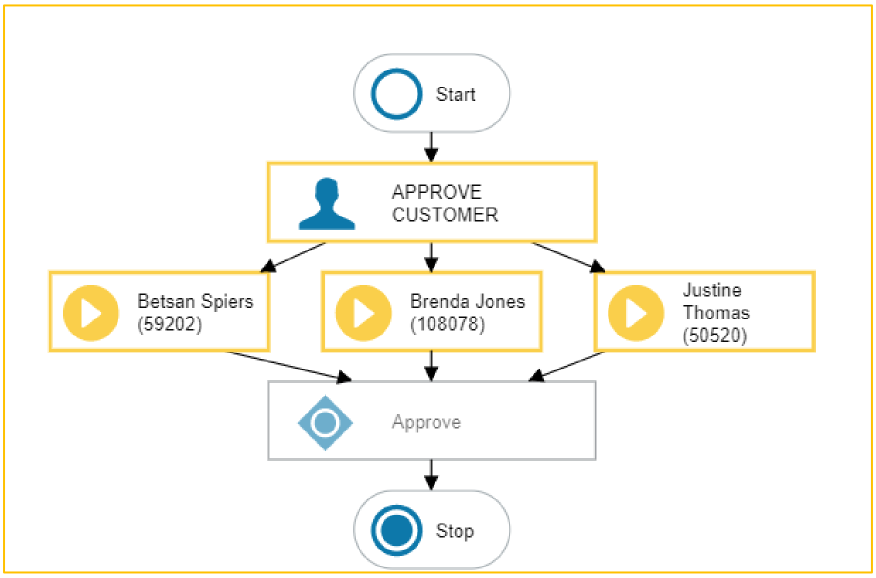


Map	Process name	Process step	Version no.	Workflow state	Task owner	CustomerID	Customer name	User
							Aberystwyth*	
	Customer Masterfile	Approve Customer	5	Workflow in progress	50520	C10252	Aberystwyth Sailing Club	100529
	Customer Masterfile	Approve Customer	5	Workflow in progress	108078	C10252	Aberystwyth Sailing Club	100529
	Customer Masterfile	Approve Customer	5	Workflow in progress	59202	C10252	Aberystwyth Sailing Club	100529

The default screen will only show active workflow, so if your customer has already been approved you would need to tick the Historical Items field.

To narrow down the search you can enter the customer name, use * as a wildcard and click on load. The customer name field is case sensitive.

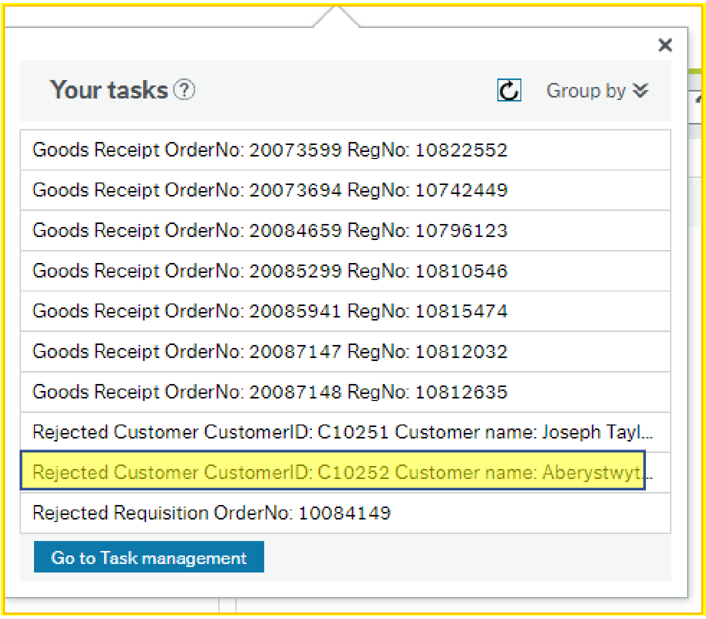
To view the map, click on the map symbol at the left of the row. The example above shows three times as it can be approved by three different users.



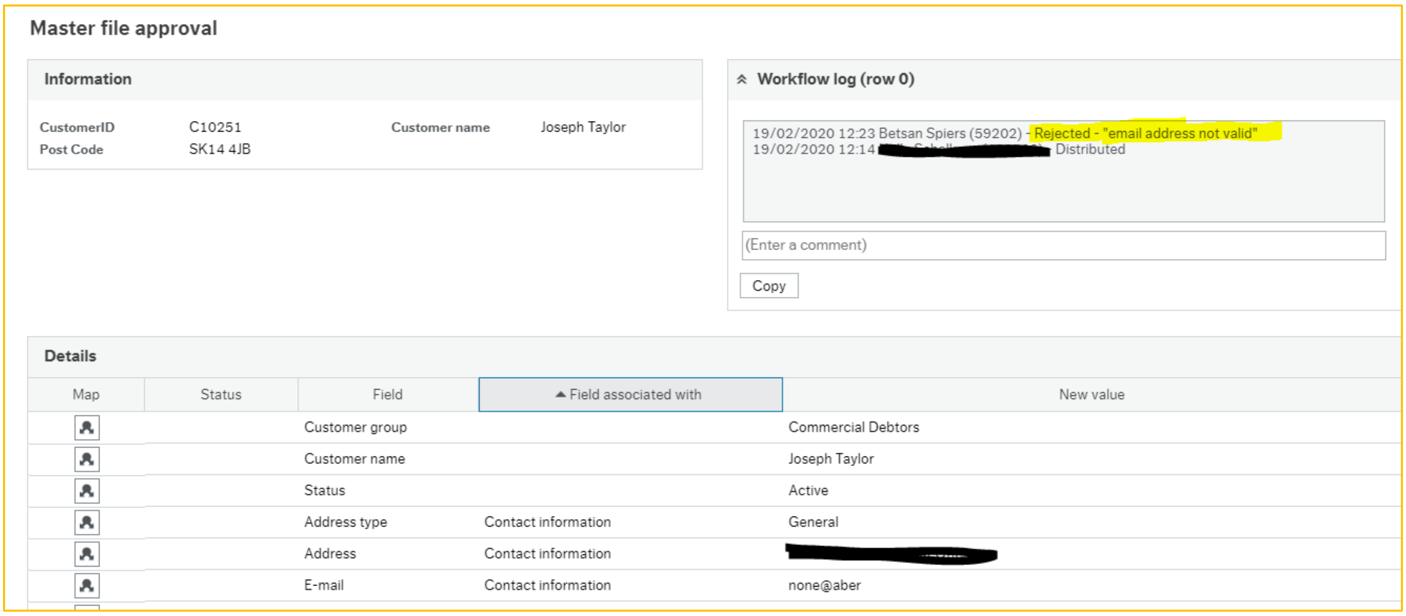
The above map shows who the new customer request has been sent to for approval.

4. Rejected Request

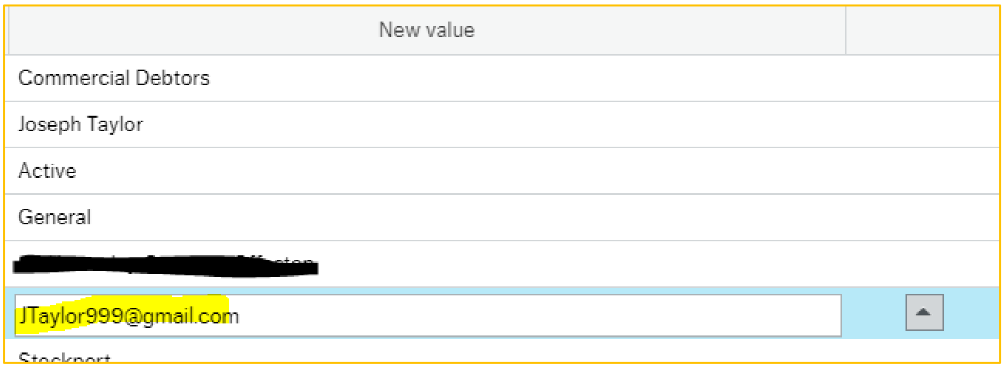
If a request is rejected it will appear on your task list:



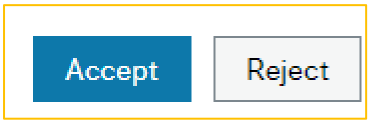
Click on the task to open it



You will see the message from Finance as to why it has been rejected. If you need to add/correct information you can do this on the screen by clicking in the relevant field in the New Value Column



Enter the correct information then click on the accept button at the bottom left of the screen

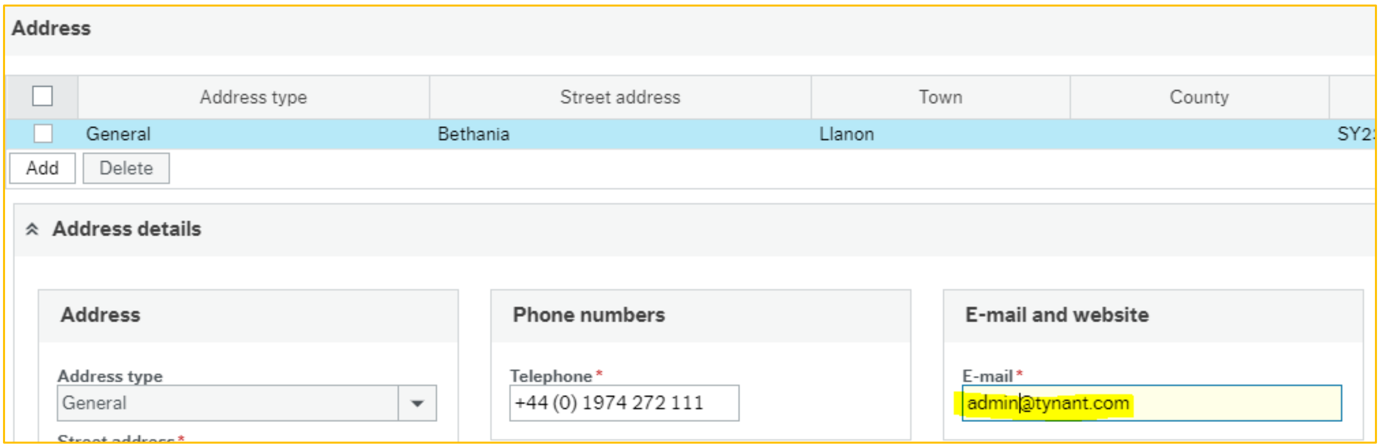


This will send the request back to the Finance Department for approval.

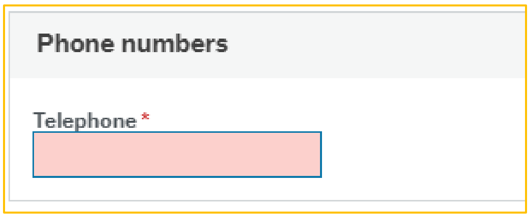
If the customer was rejected because it was a duplicate, or that the amendment is incorrect and no longer needed, you should click on the Reject Button.

5. Amending an Existing Customer

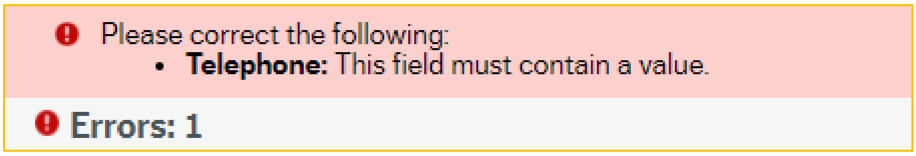
To request an amendment to an existing customer, load the customer record and then go to the field you want to update



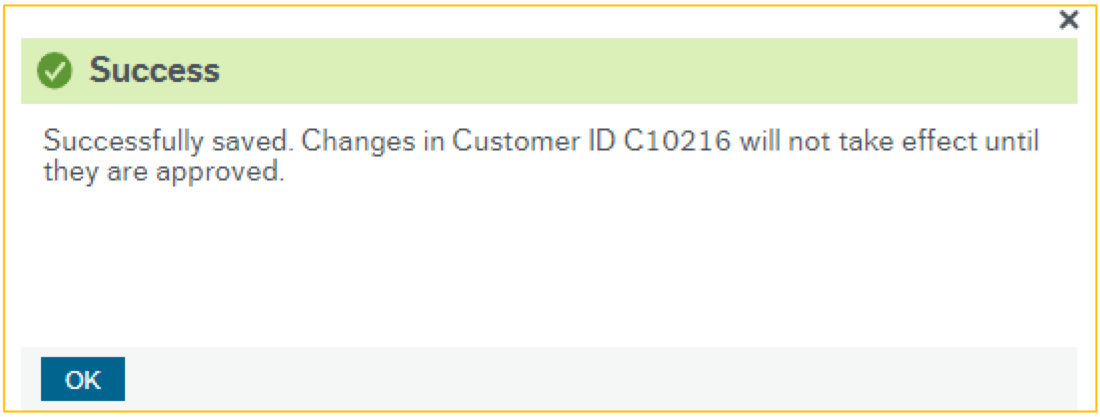
If any mandatory fields are blank, i.e. the phone number is missing, you will need to add these fields in addition to the one you want. Mandatory fields are marked with an asterisk and highlight in red if you try and leave them blank.



And an error message appear at the bottom of the screen.



Click on SAVE and you should see the following pop-up message (you may have to click on save twice if you have not tabbed out of the field you have updated):



Click on OK to close the pop-up message.

This sends the request to Finance for approval and can be viewed in the workflow map if desired.