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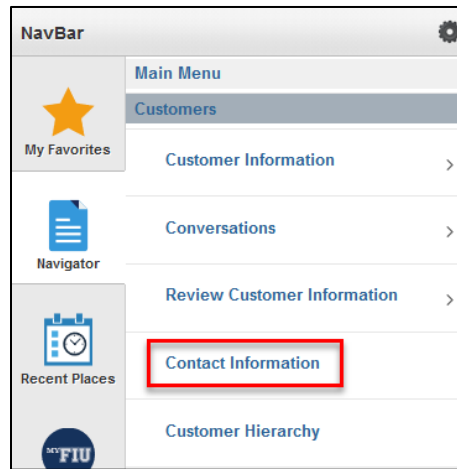
CONTACT INFORMATION

FIU

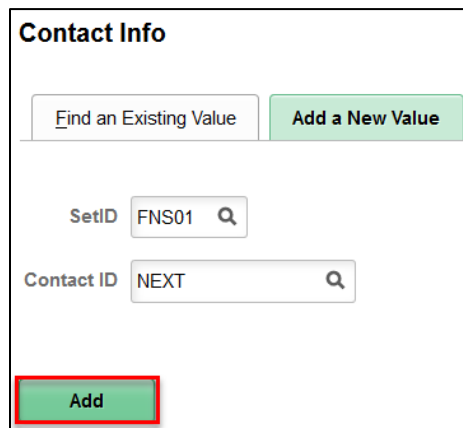
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Creating New Contact Information

Navigation: **Main Menu**> **Customers**> **Contact Information**



1. Enter the SetID= **FNS01**
 - o The Contact ID must be unique to be added



The message will appear if contact already exists:

The value you tried to add already exists.
Select it below if you'd like to update it, or
specify a new value in the fields above.

2. Fill out the Effective Date, Name, Email Address, Preferred Communication and Contact Flag
3. Click on Contact Phone and Type link to add a phone number

Contact Information

Maintain Contacts

SetID FNS01 Contact ID 33

Contact Information 1 of 1 | View All

*Effective Date: 06/26/2019 *Status: Active +

*Name: Linda Champagne *Contact Flag: Internal Contact

Title: _____

Email Address: plchampagne@fiu.edu;alyew@fiu.edu

Salutation Code:

Salutation: _____

*Preferred Communication: Call

Language Code: English

Person ID: _____

Contact Customers Contact Phone and Type

User Profile

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

4. Fill out the Phone Type and Phone Number then click **Save**

Contact Information

Contact Phone and Type

SetID FNS01 Contact ID 33

Contact Information 1 of 1 | View All

Effective Date: 06/26/2019 Name: Linda Champagne

Contact Phone Information 1-1 of 1 | View All

*Phone Type	International Prefix	Phone Number	Extension	Primary Phone		
BUSN <input type="button" value="Q"/>	<input type="text"/>	305/348-1324	<input type="text"/>	<input type="checkbox"/>	+	-

Contact Type Information 1-1 of 1 | View All

Contact Type	Description		
<input type="text"/> <input type="button" value="Q"/>		+	-

Contact Information Contact Customers

User Profile

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

5. Click on the Contact Customers link to associate the contact with a customer

Contact Information
Maintain Contacts

SetID FNS01 Contact ID 33

Contact Information 1 of 1 View All

*Effective Date 06/26/2019 *Status Active

*Name Linda Champagne *Contact Flag Internal Contact

Title

Email Address plchampagne@fiu.edu;alyew@fiu.edu

Salutation Code

Salutation

*Preferred Communication Call

Language Code English

Person ID

Contact Customers Contact Phone and Type

User Profile

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

6. Enter the Customer ID; Location= 1 then click **Save**

Contact Information
Contact Customers

Contact SetID FNS01 Contact ID NEXT

Contact Information 1 of 1 View All

Effective Date 06/27/2019 Name

Link Contact to Customer

Customer Self Service Security

*Customer SetID	*Customer ID	Customer Name	Location	Credit Cards	Documentation	Primary Bill To	Primary Ship To	Primary Sold To		
FNS01				Credit Cards	Documentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-

Contact Information Contact Phone and Type User Profile

Save Notify Add Update/Display Include History Correct History

7. Once you select a Customer ID, you will be able to click the Documentation link

Contact Customers

Documentation

Contact SetID FNS01 Contact ID NEXT Name
 Customer SetID FNS01 Customer ID 00000003 Name Miami-Dade County Parks
 Effective Date 06/27/2019

Documentation

1-1 of 1 | View All

*Document Code	*Preferred Communication	Number of Copies
INVC	Email Invoice as Attachment	1

[Contact Information](#) [Contact Customers](#)
[Contact Phone and Type](#) [User Profile](#)

The Document Codes that are available are:

Look Up Document Code

Select one of the following values:

ACKN	Order Acknowledgment
ASN	Advance Shipping Notification
BOL	Bill of Lading
CACK	Order Change Acknowledgement
CREN	Buying Agreement Renewal
CSTS	Buying Agreement Status
INCC	Invoice Courtesy Copy
INVC	Invoice
INVN	Invoice Notification
PACK	Packing List
PICK	Picking Plan
PPRC	Product Price List
PRAD	Payment Remittance Advice
QUOT	Quotation
RMA	Return Material Authorization

- In Self Service Security tab, check Bill To, Ship To, Sold To, Correspondence and View Statements then click Save

The following needs to be setup this way for “External” Customer Contact to receive any Supporting Documentation attached to a Bill.

Contact Information
Contact Customers

Contact SetID FNS01 Contact ID 49

Effective Date 07/08/2019 Name Alexis Lyew

Link Contact to Customer

Customer **Self Service Security**

*Customer SetID	*Customer ID	View All Orders	Bill To	Ship To	Sold To	Broker Customer	Correspondence	View Statements		
FNS01	00000019	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

Contact Information
 Contact Phone and Type User Profile

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

- Supporting Documentation needs to have “Internal Only” unchecked since the Customer Contact is “External”

Header Documentation Line Documentation

Business Unit FNS01 Invoice DIT-0000001

Invoice Documents

Documents Additional Info

Document Description	Attached File	Internal Only	Upload	View		
	mis_tutorial.pdf	<input type="checkbox"/>	Upload	View	+	-

Save Return to Search Notify

Header Documentation | Line Documentation