



Creating a Customer Account

for Accounts Receivables and Billing

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Search for Existing Customer

To search for an existing Customer:

1. Use the **NavBar** to navigate to **Main Menu > Customers > Customer Information > General Information**.
2. Verify the **SetID** and use the available **Search Criteria**, then click **Search**.

The screenshot shows the 'General Information' search interface. At the top, there are navigation links for 'Employee Self Service' and 'General Information'. Below this, there are two buttons: 'Find an Existing Value' (highlighted in green) and 'Add a New Value'. A section titled 'Search Criteria' is expanded, showing a search for 'SetID = FNS01'. Below this, there are several search criteria fields: 'Customer ID' (begins with), 'Name 1' (begins with 'Royal Caribbean'), 'Name 2', 'Telephone', 'City', 'State', and 'Postal Code'. At the bottom, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive', and a text input for 'Limit the number of results to (up to 300): 300'. A 'Search' button is highlighted in green, along with a 'Clear' button and links for 'Basic Search' and 'Save Search Criteria'.

3. If the customer exists, the **General Information** page will display.

The screenshot shows the 'General Information' page for an existing customer. The page has a navigation bar with 'Employee Self Service' and 'General Information'. Below the navigation bar, there are tabs for 'General Info', 'Bill To Options', 'Ship To Options', 'Sold To Options', and 'Miscellaneous General Info'. The 'General Info' tab is selected. The page displays the following information: SetID: FNS01, Customer ID: 30000010, and a 'General Info Links' link. Below this, there are several fields: '*Status' (Active), 'Level' (New), '*Date Added' (07/01/2019), '*Since' (07/01/2019), '*Type' (State and Local), '*Name 1' (Royal Caribbean), '*Short Name' (Royal Carl), 'Name 2', 'Currency Code' (USD), and 'Rate Type' (CRRNT).

For new Customers, see the [Request a New Customer](#) section of this document.

To request changes to an existing Customer or Contact, email pay@fiu.edu.

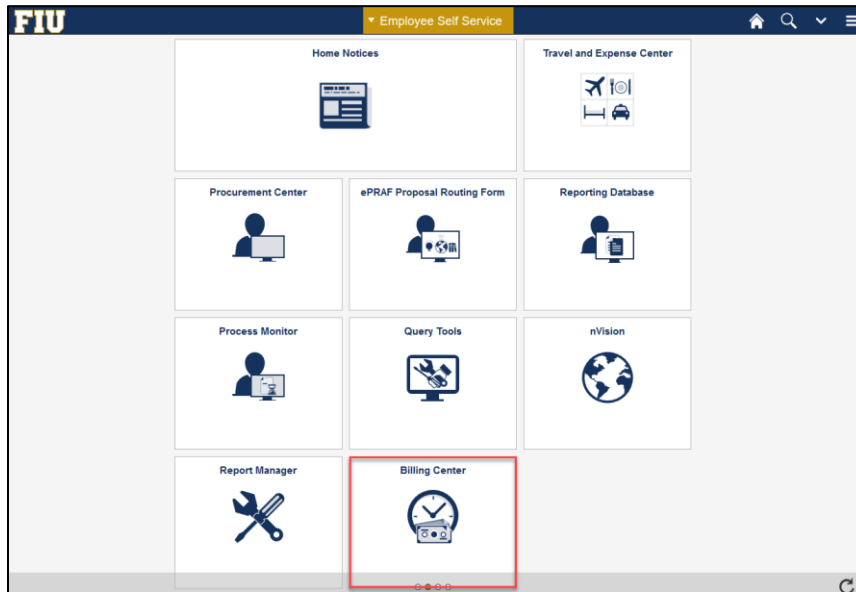
Request a New Customer

Prior to requesting a new customer, confirm whether the customer already exists in the system. For the steps to identify current customers, see the [Search for Existing Customer](#) section of this document.

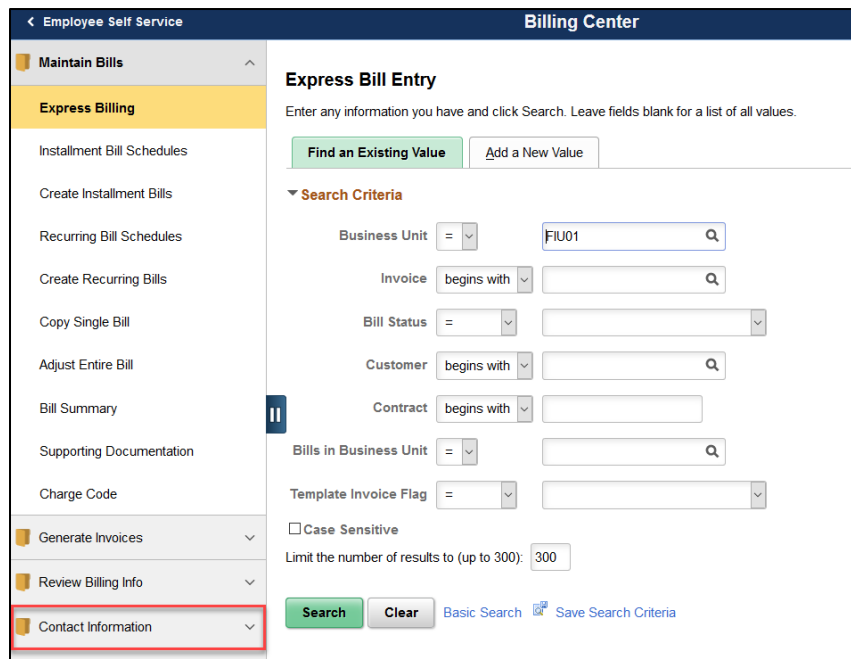
To request changes to an existing Customer or Contact, email pay@fiu.edu.

To create a **New Customer/Contact**:

1. Click the **Billing Center** tile on the **Employee Self Service** homepage within PantherSoft Financials.



2. Select **Contact Information** on the left side grey bar.



3. Select **FIU Request Customer/Contact**.

4. Within the **Add a New Value** tab, verify that “FNS01” is selected as the **SetID**, then click **Add**.

5. Fill in all required fields marked with an asterisk (*).

Enter Contact Information Section:

- a. Fill out **Name 1** with the name of the Contact.
- b. Fill out **Email Address** with the Contact’s email.
- c. Fill out **Telephone** with the Contact’s phone number.

Billing Center

Create New Customer/Contact

SetID FNS01 Non-Sponsor A/R - BI Cust/Contact Seq 3 Approval Status Initial

Enter Contact Information

*Name 1 Roary Panther

*Email Address rpanther@fiu.edu

Business Phone Home Phone

*Telephone 305/348-7200 Extension

Enter Customer Information and Address Details Section:

- a. Fill out **Customer Name**. The **Short Name** will fill in automatically.
- b. Select the **Customer Type** from the dropdown menu, excluding the options for “User 1, 2, 3, 4”.
- c. Enter the **Customer’s address**. It will be validated using address verification and standardization.

6. Click **Submit for Approval** once all the information is entered.

Enter Customer Information

*Customer Name Test

*Short Name Test

*Customer Type StateLocal

*Contact Flag External Conta

Address Details

Country USA United States

Address 1 11200 SW 8th Street

Address 2

Address 3

City Miami

County Miami-Dade Postal 33199-2516

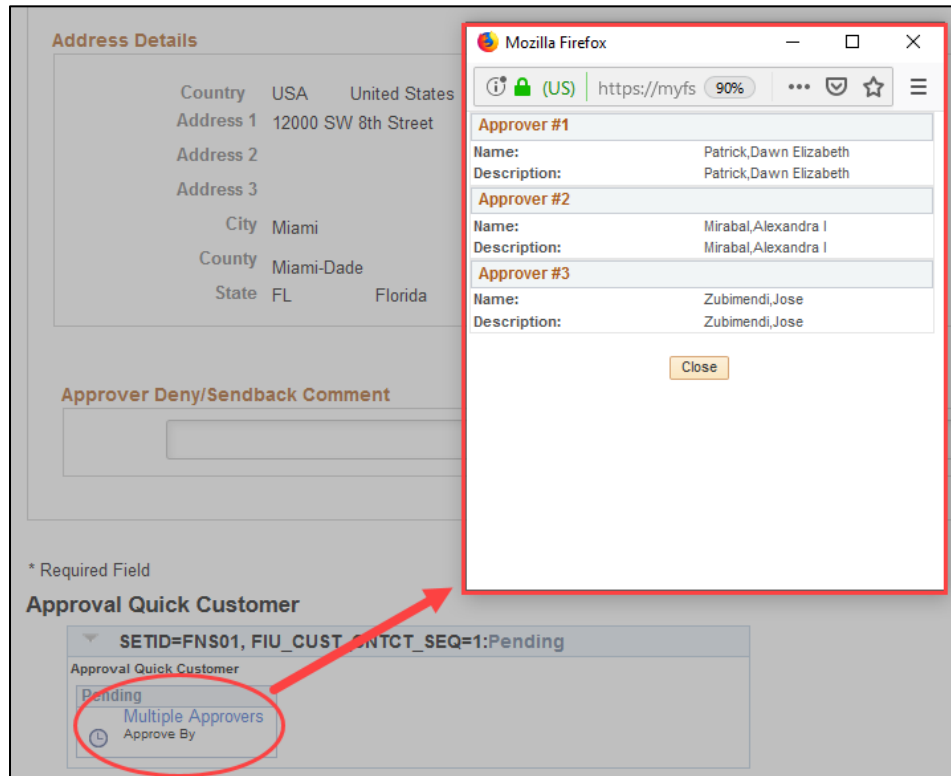
State FL Florida

Approver Deny/Sendback Comment

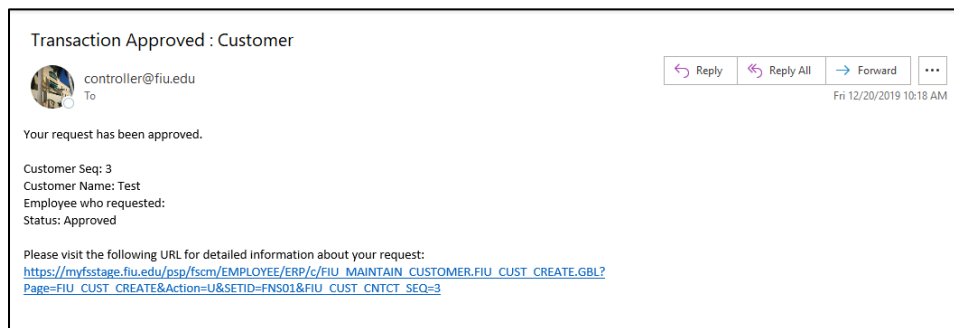
* Required Field

Save Customer/Contact Submit for Approval

7. Approvers can be verified via the [Multiple Approvers](#) link, which will appear after submission of the request.



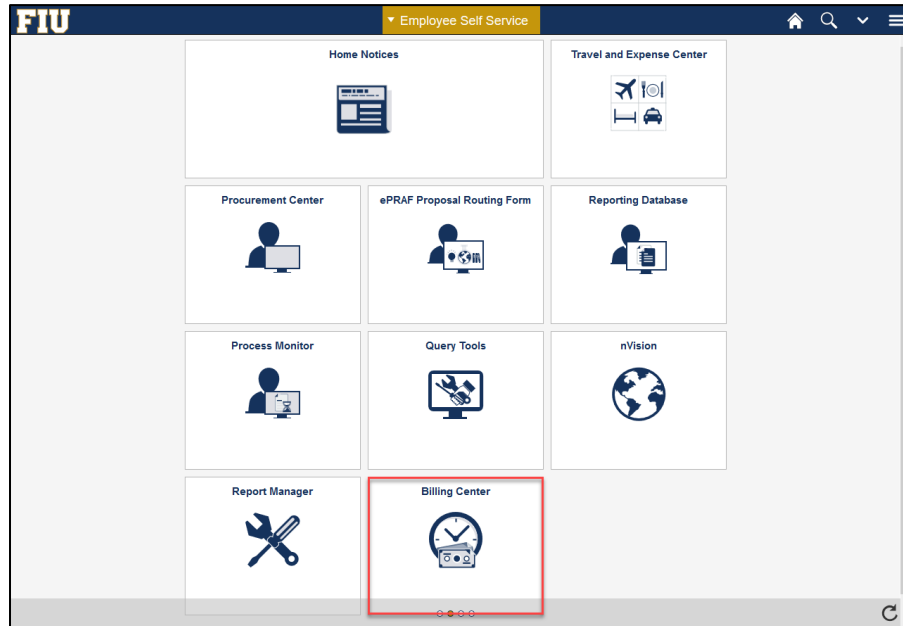
Once the Customer is approved, the submitter will receive an email like what is found below.



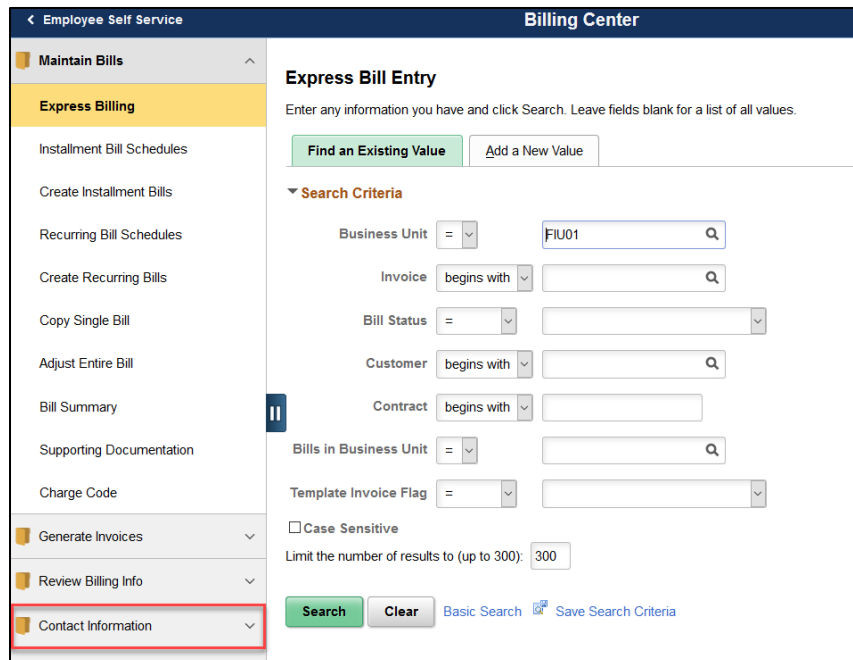
Check the Status of a Customer Request

To identify whether a request was already submitted for a Customer, or to check the status of a request:

1. Click the **Billing Center** tile on the **Employee Self Service** homepage within PantherSoft Financials.



2. Select **Contact Information** on the left side grey bar.



3. Select **FIU Request Customer/Contact**.

The screenshot shows the 'Billing Center' search interface. On the left, a navigation menu lists various options, with 'FIU Request Customer/Contact' highlighted in red. The main search area is titled 'Search Criteria' and includes several dropdown menus and text input fields: Business Unit (set to FIU01), Invoice (begins with), Bill Status (=), Customer (begins with), Contract (begins with), Bills in Business Unit (=), and Template Invoice Flag (=). There is also a 'Case Sensitive' checkbox and a 'Limit the number of results to (up to 300): 300' field. At the bottom, there are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

4. Within the **Find an Existing Value** tab, verify that “FNS01” is selected as the **SetID** and use the **Search Criteria** to locate the request.

The screenshot shows the 'Billing Center' search interface with the 'Find an Existing Value' tab selected and highlighted in red. The search criteria are: SetID (begins with FNS01), Cust/Contact Seq (begins with 1), and Customer Name (begins with Test). The 'Case Sensitive' checkbox is unchecked, and the result limit is set to 300. The 'Search' button is highlighted in green.

- Use the **Approval Status** as well as the status of the **Approval Quick Customer** to verify the overall status of the request.

Billing Center

Create New Customer/Contact

SetID FNS01 Non-Sponsor A/R - BI Cust/Contact Seq 1 Approval Status Submitted

Enter Contact Information

Name 1 Roary Panther

Email Address rpanther@fiu.edu
 Business Phone Home Phone

Telephone 305/384-7200 Extension

Enter Customer Information

Customer Name Test

Short Name Test

Customer Type StateLocal

Contact Flag External

Address Details

Country USA United States

Address 1 12000 SW 8th Street

Address 2

Address 3

City Miami

County Miami-Dade Postal 33184-1634

State FL Florida

Approver Deny/Sendback Comment

* Required Field

Approval Quick Customer

SETID=FNS01, FIU_CUST_CNTCT_SEQ=1:Pending

Approval Quick Customer

Pending

Multiple Approvers

Approve By

NOTE: Do not submit new Customer requests if one is already submitted or approved.

To view existing Customers, see the [Search for Existing Customer](#) section of this document.

To request changes to an existing Customer or Contact, email pay@fiu.edu.