Creating a Customer Account

for Accounts Receivables and Billing

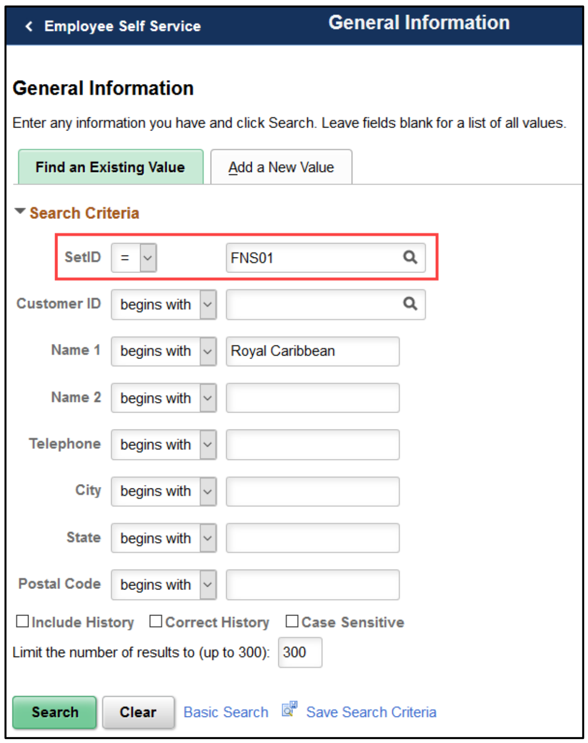
Contents

Search for Existing Customer

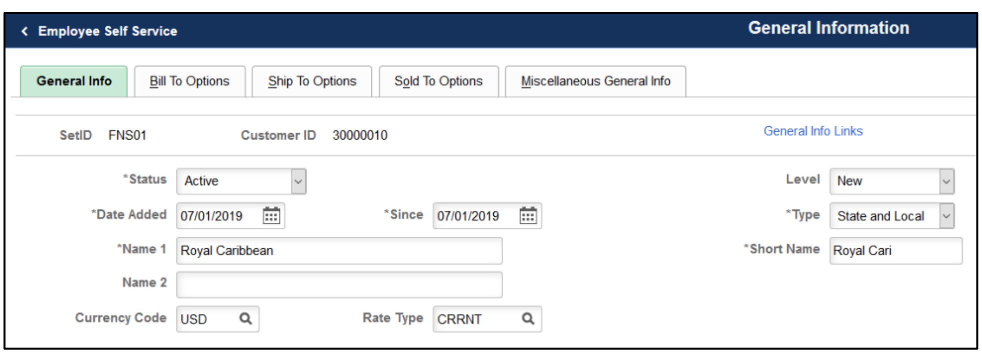
To search for an existing Customer:

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**.



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



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.

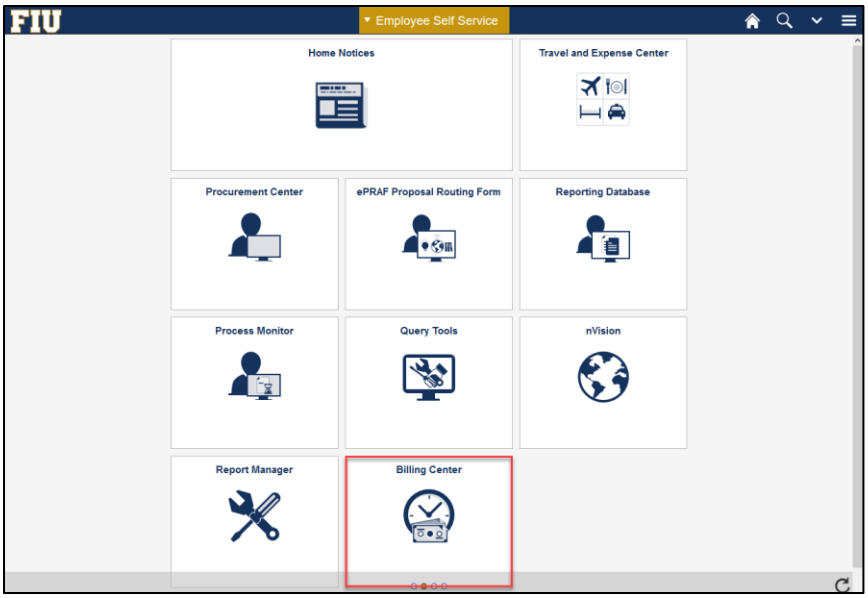
Request a New Customer

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.

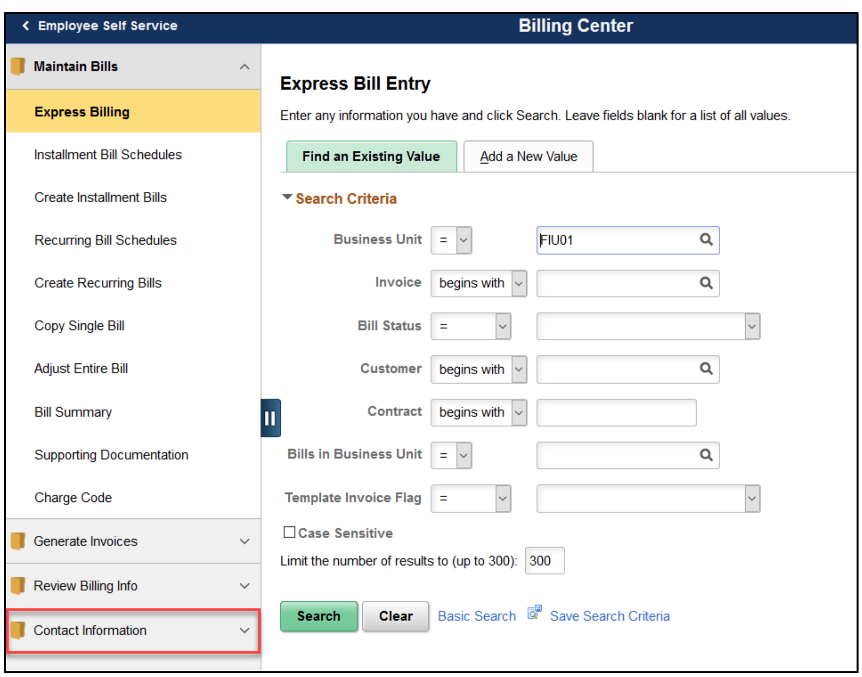
To request changes to an existing Customer or Contact, email pay@fiu.edu.

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

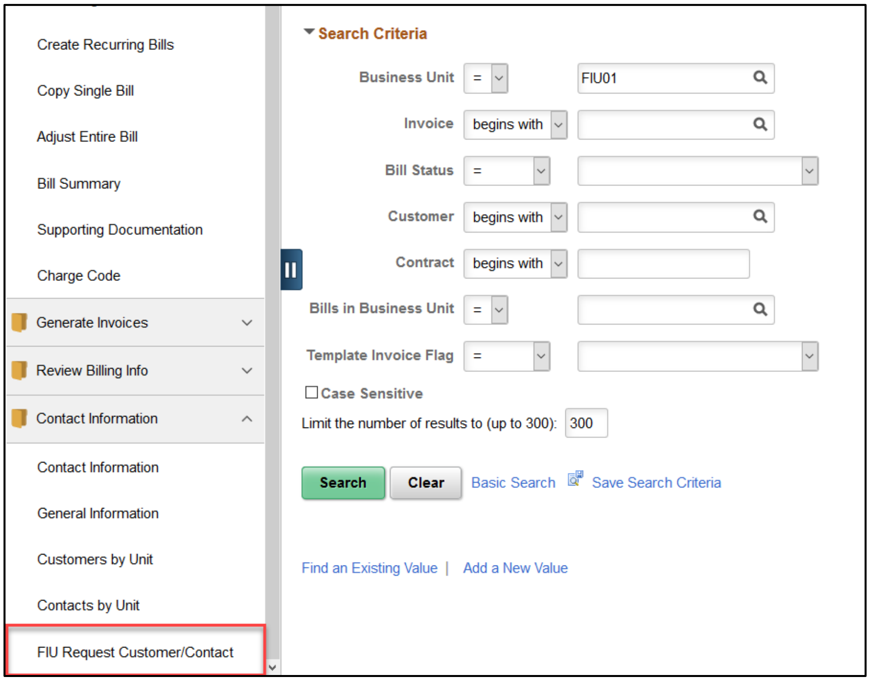
1. Click the **Billing Center** tile on the **Employee Self Service** homepage within PantherSoft Financials.



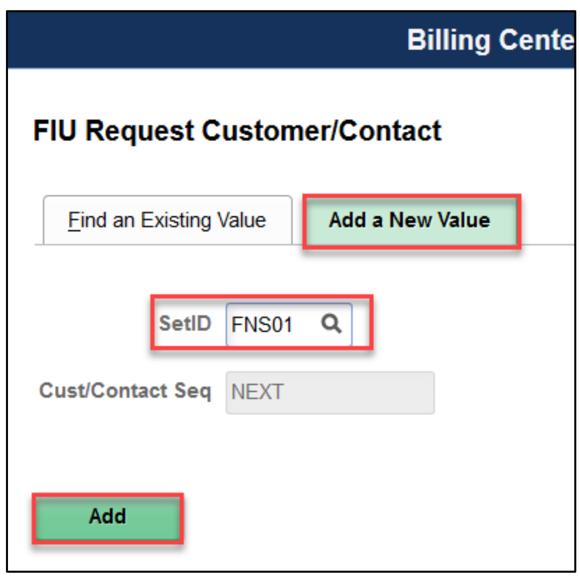
2. Select **Contact Information** on the left side grey bar.



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

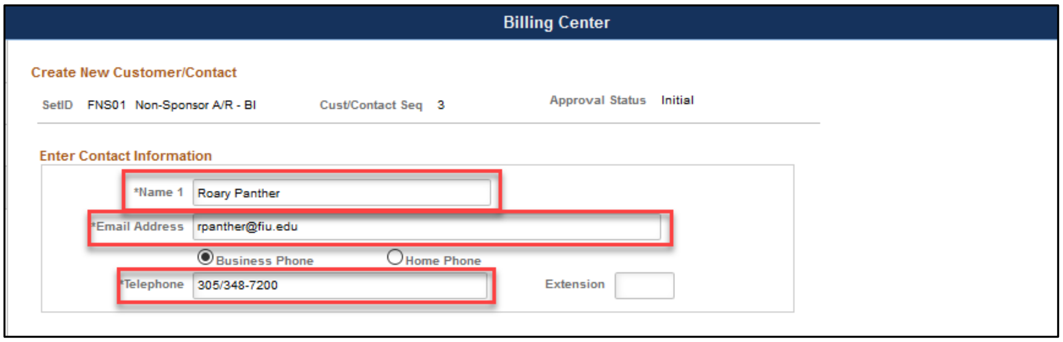


4. Within the **Add a New Value** tab, verify that “FNS01” is selected as the **SetID**, then click **Add**.



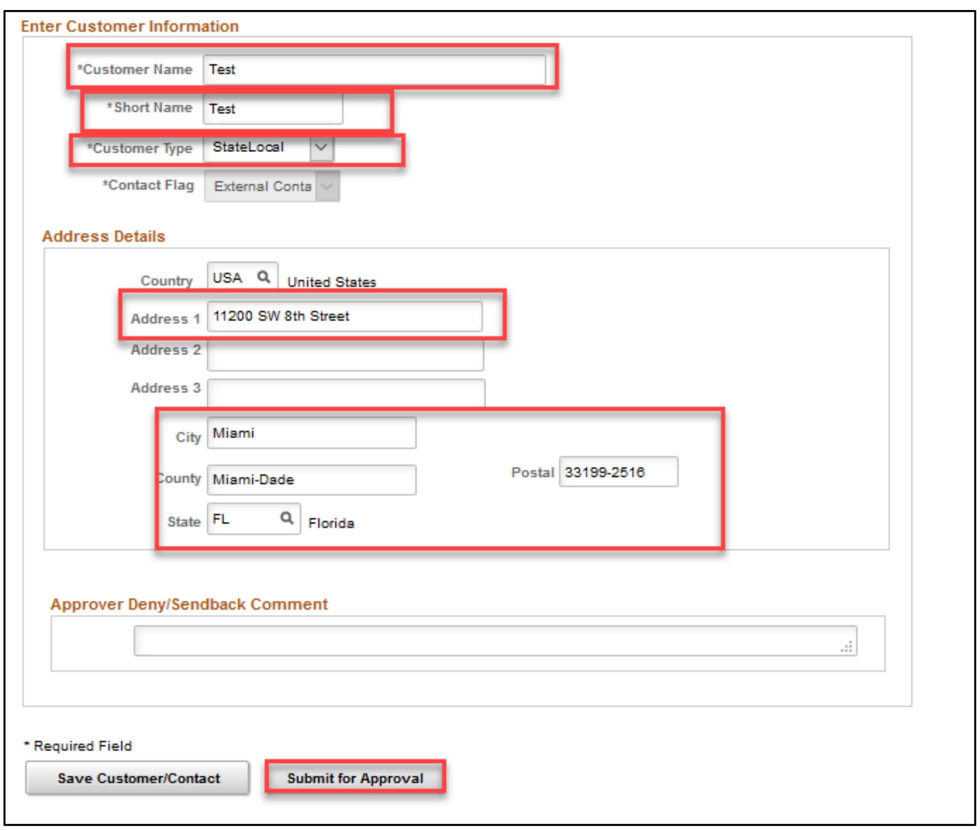
5. Fill in all required fields marked with an asterisk (*).

   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.

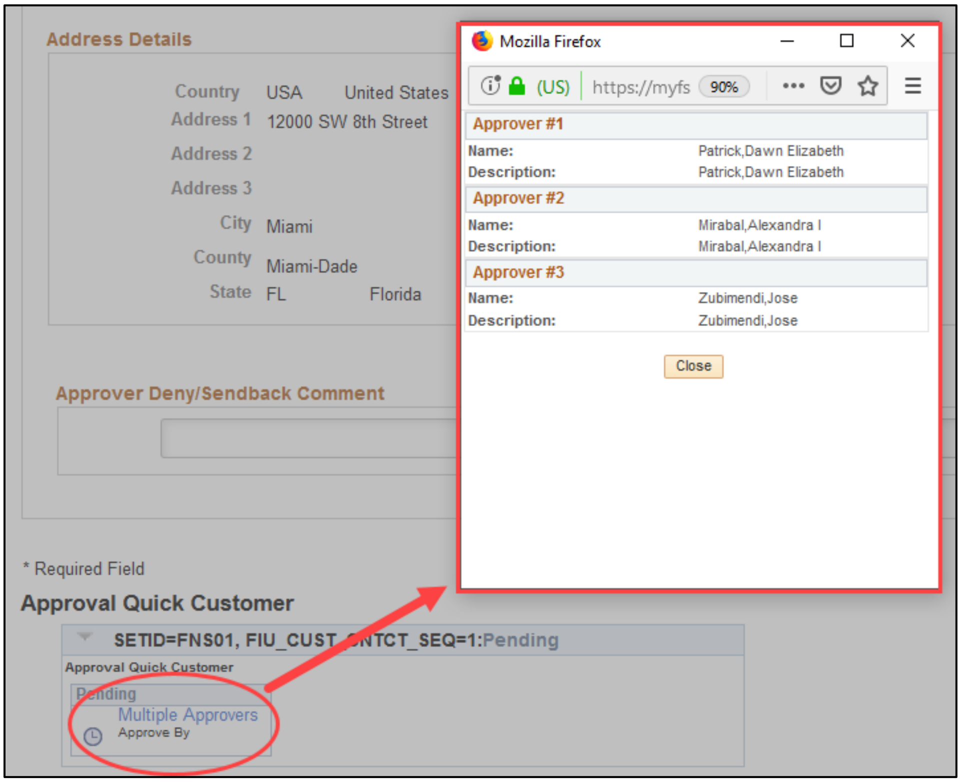


   Enter Customer Information and **Address Details** Section:
   a. Fill out **Customer Name**. The **Short Name** will fill in automatically.
   b. Select the **Customer Type** from the dropdown menu, excluding the options for "User 1, 2, 3, 4".
   c. Enter the **Customer's address**. It will be validated using address verification and standardization.

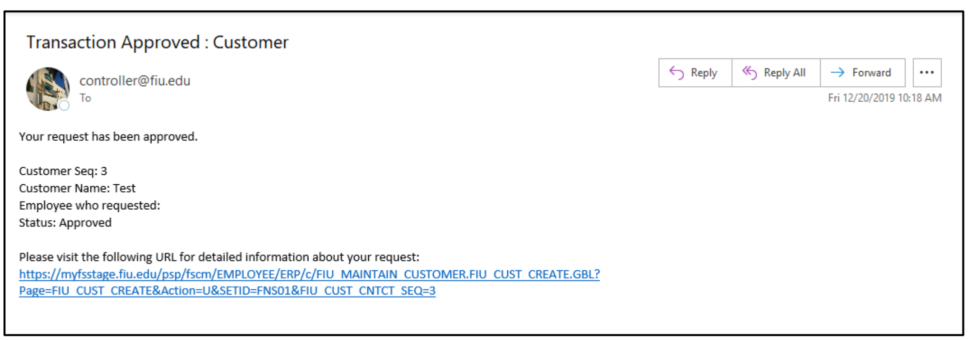
6. Click **Submit for Approval** once all the information is entered.



7. Approvers can be verified via the Multiple Approvers link, which will appear after submission of the request.



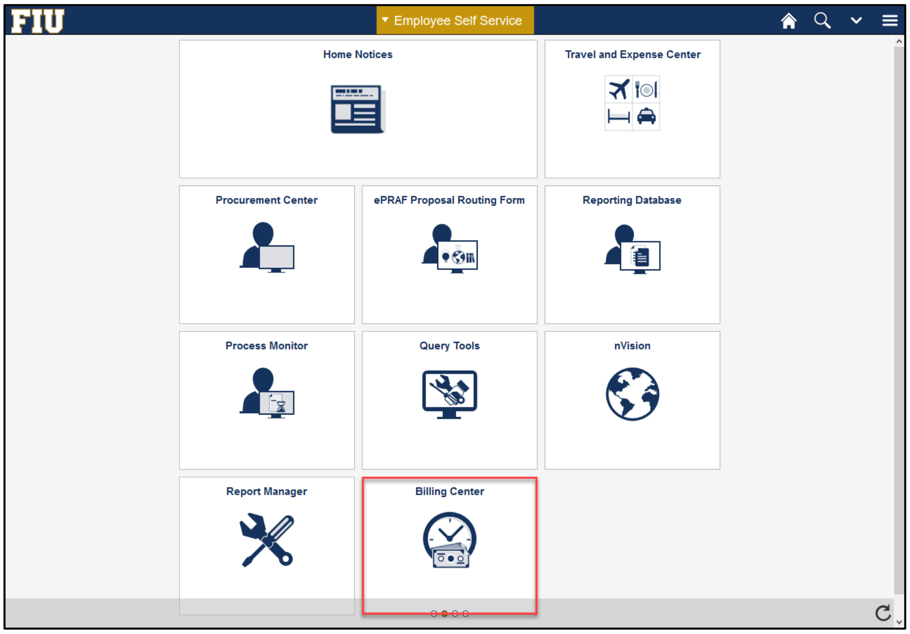
Once the Customer is approved, the submitter will receive an email like what is found below.



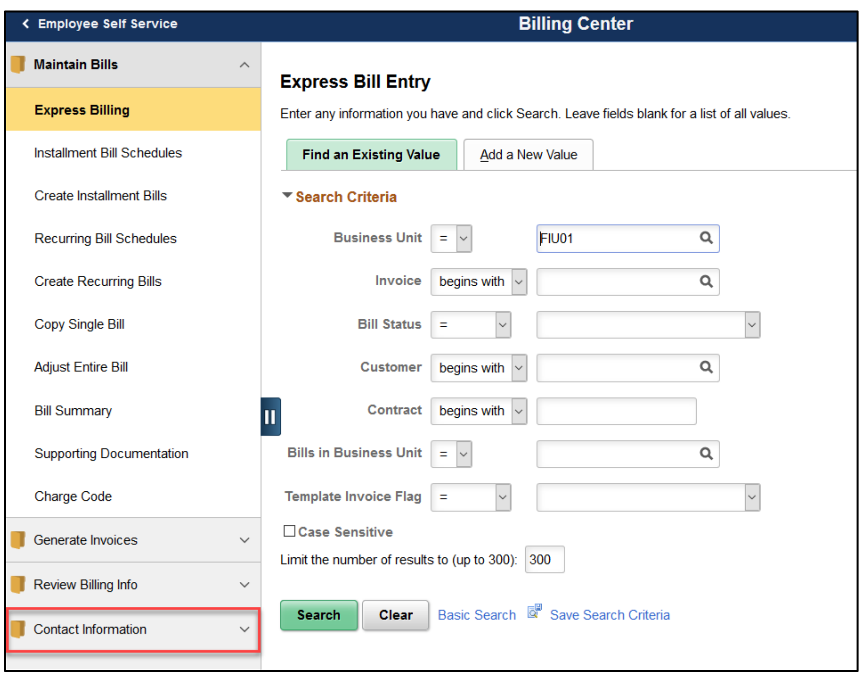
Check the Status of a Customer Request

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

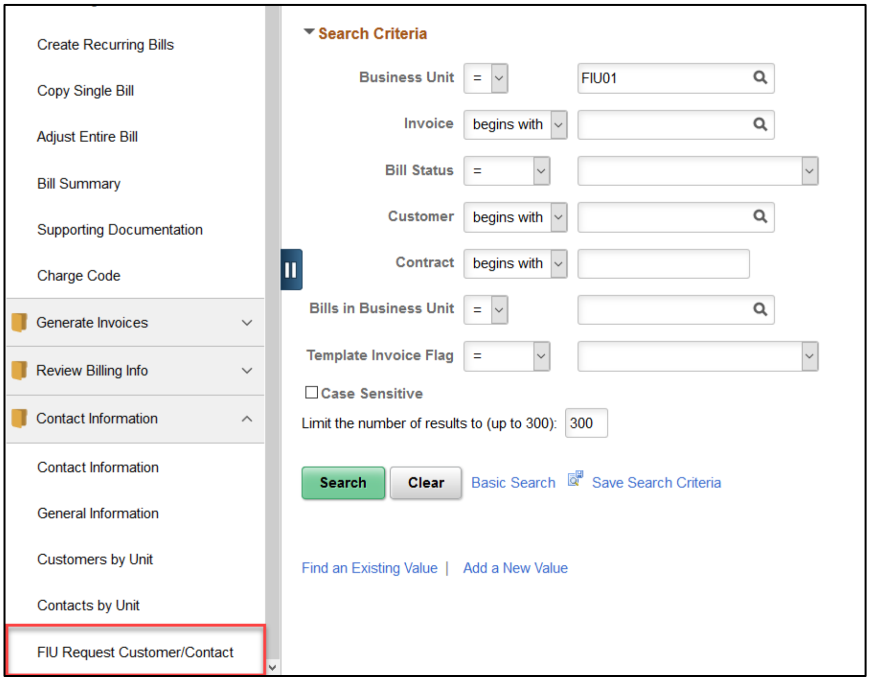
1. Click the **Billing Center** tile on the **Employee Self Service** homepage within PantherSoft Financials.



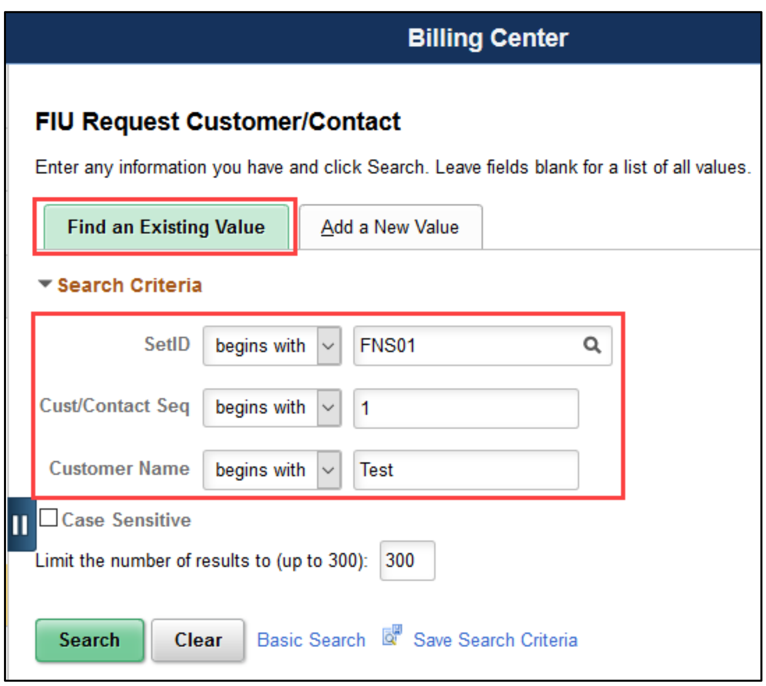
2. Select **Contact Information** on the left side grey bar.



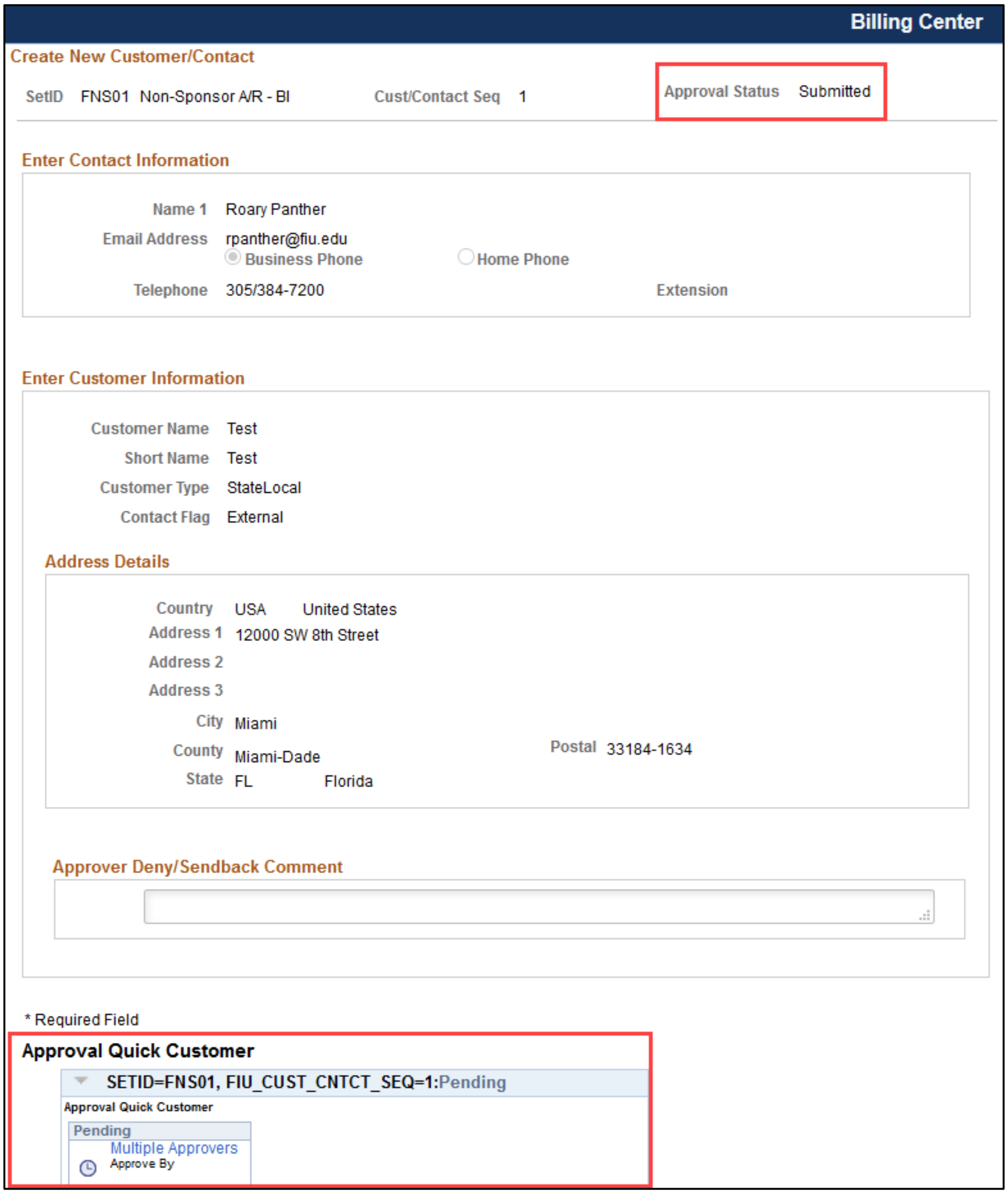
3. Select **FIU Request Customer/Contact**.



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.



5. 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.