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**.

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](mailto: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.

```
Transaction Approved : Customer

Your request has been approved.

Customer Seq: 3
Customer Name: Test
Employee Who requested: 
Status: Approved

Please visit the following URL for detailed information about your request:
https://aphub.fiu.edu/ap/Emp/Batch/EMP_MAINTAIN_CUSTOMER/ FIU/CUST_CREATE.GBL
Page=FIU_CUST_CREATE&Batch=A&SETID=FNS01&FIU/CUST_CNTL_SEQ=3
```
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.

**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](mailto:pay@fiu.edu).