Create or Update a Customer

Purpose: The purpose of this document is to provide the steps to create or update a customer for billing purposes.

Audience: Users who need to add a new customer or update an existing customer’s information for the purposes of generating an invoice for a project.

Prerequisites: Must be logged into MyUCalgary

Step 1: Navigate to the eForm

1. From the MyUCalgary, click My work.
2. Under the Direct access header, click on PS Finance & Supply Chain.
3. On the Employee Self Service screen, click on the Finance tile.
4. On the Finance navigation menu, click on Billing Transactions, and then Billing-Customer Request Form. (The black tab button will expand/collapse the Navigation menu.)
5. Click the **Add a New Value** tab.
6. Leave the **Cust Id ref** field set to **NEXT**.
7. In the **Customer Name** field enter the Customer’s name.
8. Click **Add**.

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**Step 2: Entering a New Customer**  
*(To Update an Existing Customer, proceed to Step 3).*

1. The **Request_Id** information will be automatically populated and is based on UCalgary login credentials.
2. In the **Effective Date** field, the date defaults to the current date. Please change it to the first day of the month when billing will be required.
   
   **NOTE:** This date needs to be **before** any AR items are entered into PeopleSoft for this customer. If not, the Customer will not be recognized by deposit or item.
3. In the Enter Contact Information section, enter the following information:
   a. Contact Name: enter the name of the individual who will receive a copy of the invoice.
   b. Contact Email (required): enter the email address of the individual listed in the Contact Name field. Invoice(s) will be sent via email to this email address.
   c. Accounts Payable Phone Number: enter the phone number for Customer’s Accounts Payable Department (if applicable).
      - Enter the Accounts Payable phone number extension in the Ext field (if applicable).
      - Enter the Accounts Payable fax number in the Fax field (if applicable).
   d. Click on the Lookup Customer Type button (magnifying glass) beside the Customer Type field and select Individual (which is the default).
   e. The Customer Name field should auto populate with the Customer Name that you entered in Step 1, but you can edit it here if required. An example of the Customer’s Name would be Alexander Hamilton Elementary.
   f. In the Customer Short Name field enter an abbreviated name for the Customer, (e.g. A.Ham).
   g. In the Address Description field, enter a description of where the invoice will be sent (e.g., Accounts Payable, or Finance Office, etc.).

4. In the Address Details section, enter the following mailing address information:
   a. Use the Lookup Country button (magnifying glass) to search for and select the country for the Customer’s mailing address.
   b. Use the Address fields to enter the mailing address information. (Address 1 field is required).
   c. Enter the City name in the city field.
   d. Enter the Postal Code, Zip Code, etc., in the Postal Code field.
   e. Enter the province, state, etc. the field provided.
   f. In the Comment field, enter any information that AR should be made aware of.
   g. At the bottom on the form click Save.

5. Once the eForm has been Saved, the requestor will see the following message on the screen:

   ![Message](Image)

   ![Image of eForm](Image)
6. Accounts Receivable will review the **New Customer Request** and will complete customer set up. Once AR has completed the set up, an email will be sent to requestor with the newly generated **Customer ID**.

### Step 3: Updating a Customer

Customer information can be modified by adding the new information and using effective dates. This is optimal in retaining customer history. Updates to a customer include: Adding a new address (location), adding a new contact, or updating an existing address, contact name or email address.

1. The **Request_Id** information will be automatically populated and is based on UCalgary login credentials.
2. In the **Effective Date** field, enter the date the new information should be effective for. The Effective date will default to the current date if you do not update it.
3. Select the **tick box** beside **Update Customer**.
4. The **Customer ID** field will display. Use the **Lookup Customer ID** button (magnifying glass) to search for and select the Customer you are looking to update.
5. In the **Enter Contact Information** section, enter the contact’s name and email address where invoice(s) should be sent:
   a. If updating the **Contact Name**, enter the new name in the **Contact Name** field.
   b. If you are updating the email address where invoice(s) should be sent, please enter the new email address. (Even if you are not updating the email address, it is a required field, so please enter the email address already on file).
   c. **Accounts Payable Phone Number**: enter the phone number for Customer’s Accounts Payable Department (if applicable).
      - Enter the Accounts Payable phone number extension in the **Ext** field (if applicable).
      - Enter the Accounts Payable fax number in the **Fax** field (if applicable).
   d. Click on the **Lookup Customer Type** button (magnifying glass) beside the **Customer Type** field and select **Individual** (which is the default).
   e. The **Customer Name** field should auto populate, but you can edit it here if required. An example of the Customer’s Name would be *Alexander Hamilton Elementary*.
   f. In the **Customer Short Name** field enter an abbreviated name for the Customer, (e.g., *A.Ham*).
   g. In the **Address Description** field, enter a description of where the invoice will be sent (e.g., *Accounts Payable*, or *Finance Office*, etc.). (Even if you are not updating the Address Description, it is a required field, so please enter the address description already on file).
   h. In the **Address Details** section, enter customer mailing address or the new address (location) that you are requesting.
   i. Use the **Lookup Country** button (magnifying glass) to search for and select the country for the Customer’s mailing address.
   j. In the **Comment** field, enter any information that AR should be made aware of.
   k. At the bottom on the form click **Save**.

6. Once the eForm has been **Saved**, the requestor will see the following message on the screen:
7. Accounts Receivable will review the request received and complete customer update. Upon completion, an email will be sent to the requestor confirming that the customer has been updated.

8. If a submitted request is denied, the requestor will receive an email notification with comments entered in the Comment Box.

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