



Maintaining Customers

The Customer eDoc identifies individual customers and provides their tax information, contact name and address information.

Maintenance tab → Accounts Receivable → Customer

The screenshot shows the Kuali Financial Systems web interface. The top navigation bar includes 'Main Menu', 'Maintenance', and 'Administration'. Below this, there are buttons for 'action list' and 'doc search', and a 'Logged in' status indicator. A 'Message Of The Day' section displays 'WE ARE LIVE! (PRD, 06/22/2012)'. The main content area is divided into two sections: 'Chart of Accounts' and 'Accounts Receivable'. The 'Accounts Receivable' section contains a list of links: 'Category', 'Customer', 'Customer Type', and 'Customer Address Type'. The 'Customer' link is circled in blue.

Business Rules

- The Customer must have at least one address.

Legend

- KFS eDoc
 - * = Required
- Process Documentation
 - (Required) = System/Organizational Requirement
 - (Optional) = For departmental use
 - (Not used) = Not being used by UH



Kuali Financial System Process Documentation - Customer

eDoc Information Box

Customer	Doc Nbr: 5974	Status: FINAL
	Initiator: ctaketa	Created: 08:39 AM 11/29/2011

[expand all](#) [collapse all](#)
* required field

- Doc Nbr = eDoc Number and Invoice Number
- Initiator = UH username of person initiating eDoc
- Status = In Process, Saved, Enroute, Final
- Created = Date eDoc was initiated

Buttons



1. Click the 'save' button to continue editing in the future
2. Click the 'submit' button to route for approval:
 - Non-CG Customers – General Accounting (GALC)
 - CG Customers – Office of Research Services (ORS)
3. Click the 'close' button to close the eDoc
4. Click the 'cancel' button to cancel the eDoc

After the Customer eDoc is in 'Final' status, the following buttons will display:

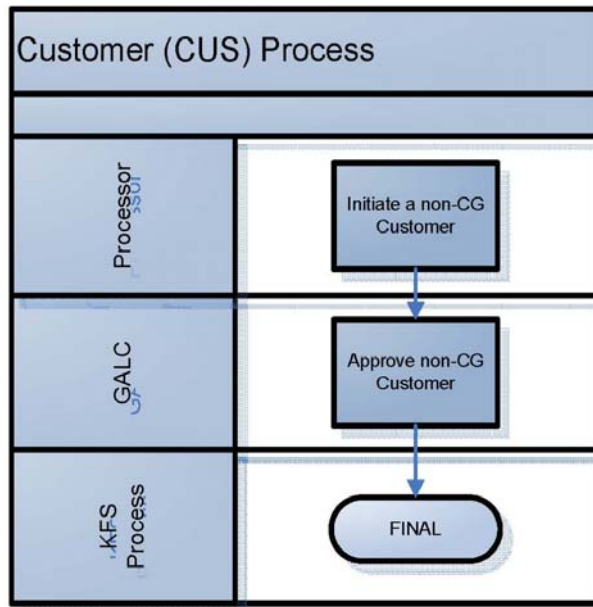


5. Click the 'send ad hoc request' to send an FYI or acknowledgement
6. Click the 'close' button to close the eDoc



Kuali Financial System Process Documentation - Customer

Search for an existing Customer by selecting from the attributes available or click the 'create new' button to create a new Customer:





Kuali Financial System Process Documentation - Customer

Document Overview

Document Overview hide required field

* Description:	<input type="text"/>	Explanation:	<input type="text"/>
Organization Document Number:	<input type="text"/>		
Financial Document Detail			Total Amount: <input type="text"/>

1. (Required) Enter in a Description
 - Start with the 3-digit FO code followed by a short description
2. (Optional) Enter in an Explanation
3. (Optional) Enter in an Organization Document Number

General Information

General Information hide

New	
Customer Number:	<input type="text"/>
* Customer Name:	<input type="text"/>
* Customer Type:	<input type="text"/>
Active Indicator:	<input checked="" type="checkbox"/>
Customer Record Add Date:	<input type="text"/>
Last Activity Date:	<input type="text"/>
Last Address Change Date:	<input type="text"/>

4. (Required) Enter in the Customer Name
 - Format for Individuals: 'LAST, FIRST M'
 - No special or Hawaiian language special characters
 - Special character examples: '!', '@', '#', '\$', '%', '^', '&', '*', '(' and ')'
 - Hawaiian language special character examples: 'ā' and 'ō'
5. (Required) Select the Customer Type from the drop-down menu
 - The 'CG Use Only' types will be used by ORS only for Contracts and Grants Billing
6. (Required) System Default: Active Indicator will be selected in the check box
 - To deactivate the customer, unselect the check box

Corporate Information

Corporate Information hide

New	
Tax Number:	<input type="text"/>
Tax Number Type:	<input type="radio"/> FEIN <input type="radio"/> SSN <input checked="" type="radio"/> NONE
Tax Exempt Indicator:	<input type="checkbox"/>
Credit Approved By:	<input type="text"/>
Credit Limit Amount:	<input type="text"/>

7. (Optional) Enter in the Tax Number
8. (Required if Tax Number is populated) System Default: The Tax Number Type will default to NONE
 - To change, select the Tax Number Type radio button
9. (Optional) System Default: Tax Exempt Indicator will default to 'No'
 - To change, select the check box for 'Yes'
10. (Not Used) Credit Approved By is not being used
11. (Not Used) Credit Limit Amount is not being used



Kuali Financial System Process Documentation - Customer

Contact Information

Contact Information	
<input type="button" value="hide"/>	
New	
Birth Date:	<input type="text"/>
Email Address:	<input type="text"/>
Phone Number:	<input type="text"/>
800 Phone Number:	<input type="text"/>
Fax Number:	<input type="text"/>
Contact Name:	<input type="text"/>
Contact Phone Number:	<input type="text"/>

12. (Not Used) Birth Date is not being used due to sensitive information
13. (Optional) Enter in the Email Address
14. (Optional) Enter in the Phone Number (format = xxx-xxx-xxxx)
15. (Optional) Enter in the 800 Phone Number (format = xxx-xxx-xxxx)
16. (Optional) Enter in the Fax Number (format = xxx-xxx-xxxx)
17. (Optional) Enter in the Contact Name
18. (Optional) Enter in the Contact Phone Number (format = xxx-xxx-xxxx)



Kuali Financial System Process Documentation - Customer

Addresses

The screenshot shows a web form titled 'New Customer Address' within a 'Addresses' tab. The form contains the following fields and controls:

- Address Type:** A drop-down menu with 'Primary' selected.
- * Address Name:** A required text input field.
- * Address 1:** A required text input field.
- Address 2:** An optional text input field.
- * City:** A required text input field.
- State:** A drop-down menu.
- Postal Code:** A text input field.
- International Province:** A text input field.
- International Postal Code:** A text input field.
- * Country:** A required drop-down menu.
- Email Address:** A text input field.
- Address End Date:** A date picker field.
- add:** A button at the bottom right of the form.

19. (Required) Select the Address Type from the drop-down menu
 - Options:
 - Primary - One address per Customer that will default as the Bill To Address in the Customer Invoice
 - Alternate - Multiple addresses per Customer that can be used as both Bill To and Sold To Addresses
 - Temporary - Multiple addresses per Customer that have an address end date
20. (Required) System Default: The Customer Name will be pulled into the Address Name
 - To change, edit as applicable
21. (Required) Enter in the Address 1
22. (Optional) Enter in Address 2
23. (Required) Enter in the City
24. (Required if Country = US) Select the State from the drop-down menu
25. (Required if Country = US) Enter in the Zip/Postal Code (zip code format = xxxxx or postal code format = xxxxx-xxxx)
26. (Required if International) Enter in the International Province
27. (Required if International) Enter in the International Postal Code
 - Note: No spaces are allowed
28. (Required) Select the Country from the drop-down menu
29. (Optional) Enter in the Email Address
30. (Required if using Temporary) Enter in the Address End Date (format = mm/dd/yyyy) or select from the calendar
31. (Required) Click the 'add' button

UH Extended Attributes

The screenshot shows a web form titled 'UH Extended Attributes' within a 'UH Extended Attributes' tab. The form contains the following fields:

- Legacy Code:** A text input field.
- UH Number:** A text input field.

32. (Not Used) Legacy Code - FMIS-ARS Customer Code. Used for Central Office FMIS-ARS to KFS-AR Customer conversion only
33. (Optional) Enter in the UH ID Number (format = xxxxxxxx)



Kuali Financial System Process Documentation - Customer

Customer ?	Backdoor Id heidy is in use	Doc Nbr: 10941	Status: ENROUTE
		Initiator: heidy	Created: 06:26 PM 06/08/2012

Document was successfully submitted.

[expand all](#) [collapse all](#)

* required field

Document Overview ▼ hide

Document Overview

* Description: 066 - Create John Doe	Explanation: Create non-CG Customer
Organization Document Number:	

General Information ▼ hide

New

Customer Number:	2545
Customer Name:	DOE, JOHN
Customer Type:	IO - Individual - Other
Active Indicator:	Yes
Customer Record Add Date:	06/08/2012
Last Activity Date:	06/08/2012
Last Address Change Date:	

Corporate Information ▼ hide

New

Tax Number:	*****
Tax Number Type:	SSN
Tax Exempt Indicator:	No
Credit Approved By:	
Credit Limit Amount:	

Contact Information ▼ hide

New

Birth Date:	
Email Address:	
Phone Number:	
800 Phone Number:	
Fax Number:	
Contact Name:	JOHN DOE
Contact Phone Number:	808-123-4567

Addresses ▼ hide

▼ hide Customer Address (DOE, JOHN - Primary)

Address Type:	Primary
Address Name:	DOE, JOHN
Address 1:	156 ALOHA AVENUE
Address 2:	
City:	HONOLULU
State:	HAWAII
Postal Code:	96825
International Province:	
International Postal Code:	
Country:	UNITED STATES
Email Address:	
Address End Date:	

UH Extended Attributes ▼ hide

New

Legacy Code:	
UH Number:	12345678

Notes and Attachments (0) ▶ show

Ad Hoc Recipients ▶ show



Kuali Financial System Process Documentation - Customer

Route Log hide

Route Log Backdoor Id heidy is in use refresh

ID: 10941 hide

Title	Edit Customer - 066 - Create John Doe		
Type	Customer	Created	06:26 PM 06/08/2012
Initiator	Uno, Heidy-ann	Last Modified	06:27 PM 06/08/2012
Route Status	ENROUTE	Last Approved	
Node(s)	Customer eDoc Reviewer	Finalized	

Actions Taken hide

Action	Taken By	For Delegator	Time/Date	Annotation
COMPLETED	Uno, Heidy-ann		06:27 PM 06/08/2012	

Pending Action Requests hide

Action	Requested Of	Time/Date	Annotation
show IN ACTION LIST APPROVE	UH GALC	06:27 PM 06/08/2012	KFS-AR Customer eDoc Reviewer GALC

Future Action Requests hide

Action	Requested Of	Time/Date	Annotation
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Log Action Message hide

Action Message log

send ad hoc request reload close