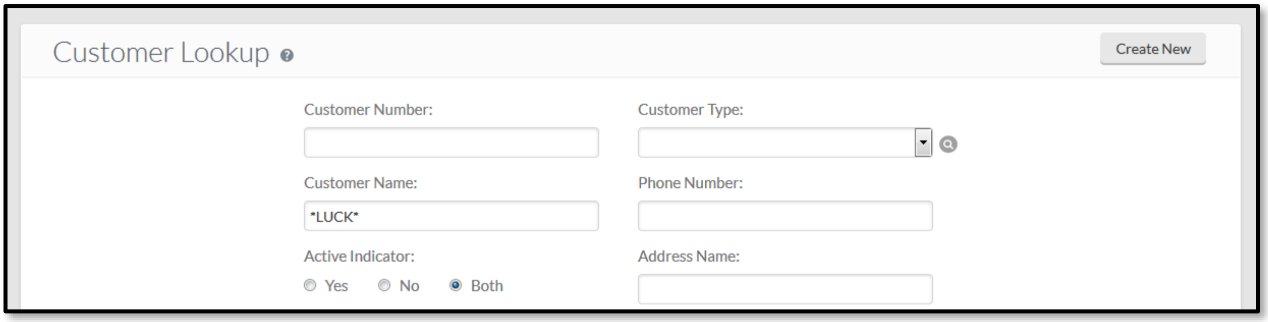
Customer

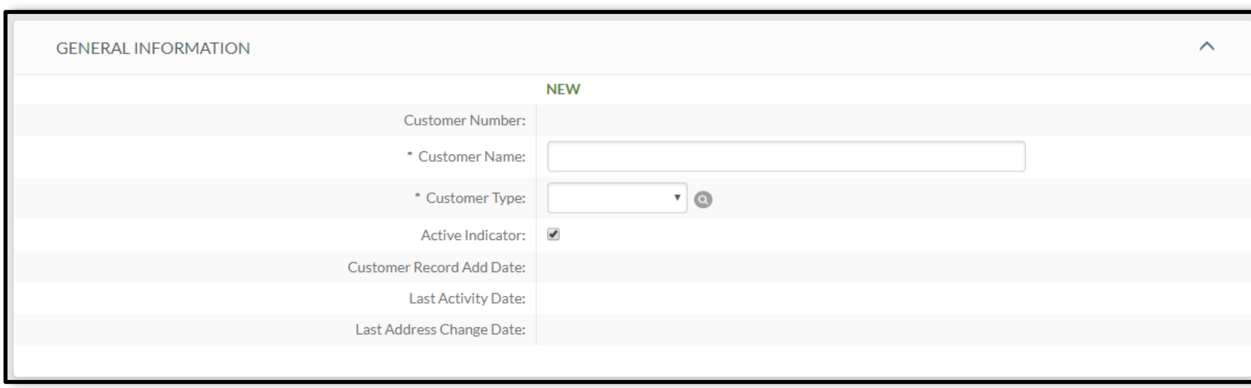
The Customer document identifies individual customers and provides their tax information, contact name, and address information. After determining that the customer doesn't already exist, a new Customer document is created by clicking on the 'Create New' button on the upper right corner of the Customer lookup page.



Document Layout

.The Customer document includes **General Information**, **Corporate Information**, **Contact Information**, **Addresses** and **Collections** tab.

General Information Tab



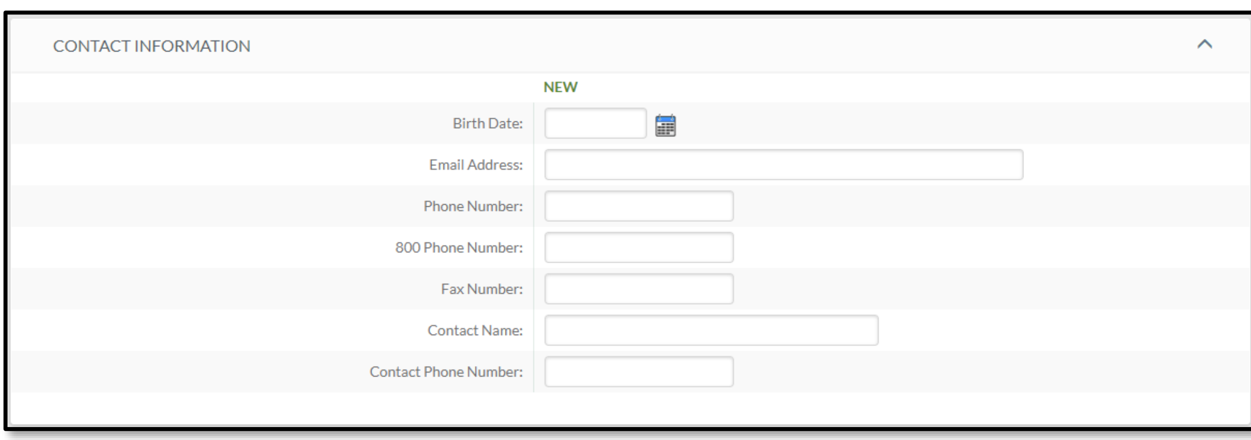
General Information tab field definitions

Title	Description
Active Indicator	Indicates whether this customer code is active or inactive. Remove the check mark to deactivate this customer code. After inactive, a customer may not have any further invoices issued to them; however, payments will continue to be accepted.

Customer Name	Required. The textual name that commonly references or represents the customer organization. See ‘Business rules for Creating New Customers’ document.
Customer Number	Display only. A unique number assigned to identify each vendor/organization as a customer.
Customer Record Add Date	Display only. The date this Customer record was added to the data base.
Customer Type	Required. The grouping for the desired type of customer (Individual, private business, etc.). Existing customer types may be retrieved from the list or from the **lookup**.
Invoice Template	Optional: The invoice template that will be used when invoices are generated for this customer. Existing templates may be retrieved from the list or from the **lookup**. Invoice Templates can be restricted by chart and organization. This field will only display if Contracts and Grants Billing is turned on.
Last Activity Date	Display only. The most recent date on which any part of the Customer record was changed.
Last Address Change Date	Display only. The date this customer's address was last changed.

Corporate Information Tab – Due to IU’s Critical Data Policy DM-01, we do not want this section completed in the customer record.

Contact Information Tab



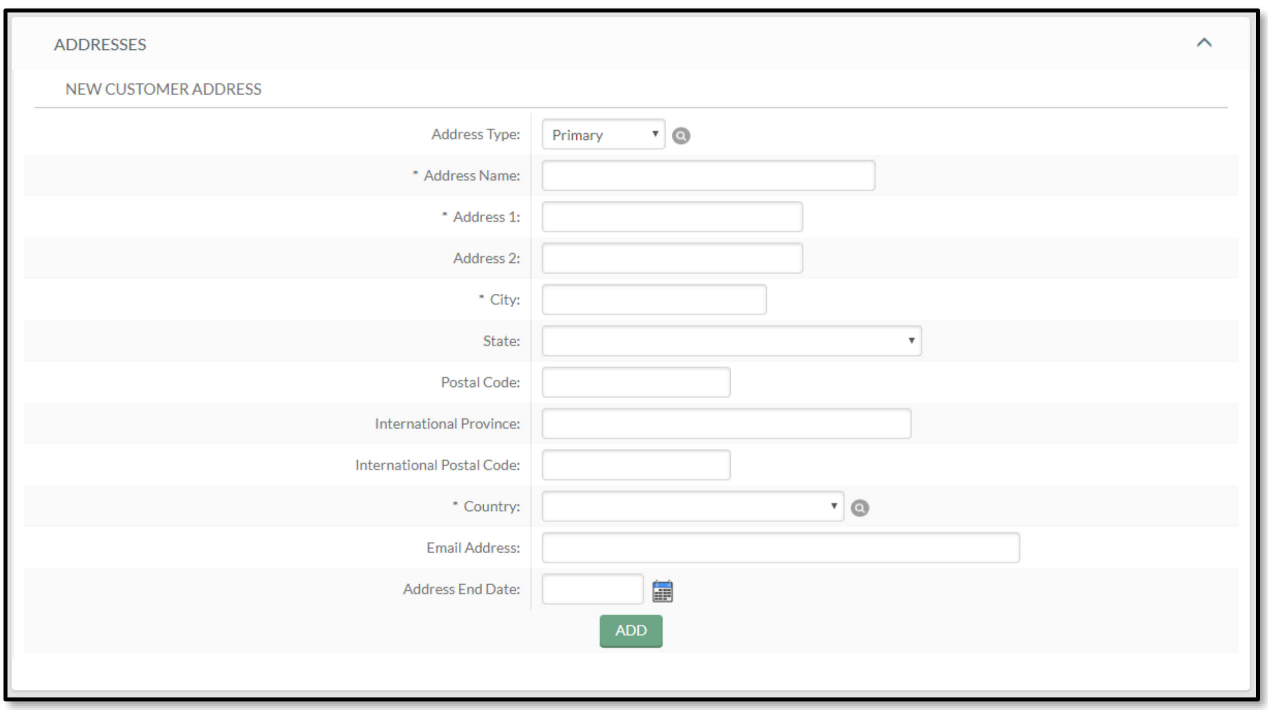
Contact Information tab field definitions

Title	Description

800 Phone Number	Optional. A toll-free number for this customer.
Birth Date	Do not complete this field.
*Contact Name	The name of the primary contact for this customer.
Contact Phone Number	Optional. The contact person's phone number.
*Email Address	Optional if a phone number is provided. The customer's email address.
Fax Number	Optional. A fax number for this customer.
*Phone Number	Optional if an email address is provided. A phone number for this customer.

Addresses Tab

Use this tab to enter one or more addresses for the customer. Only one address may be designated as the primary address.



Addresses tab field definitions

Title	Description
Address 1	Required. The customer's street address.
Address 2	Optional. The second line of the address for this customer.
Address End Date	Optional. The date on which this address will no longer be valid. Enter a date or use the calendar tool to find it.

Address Name	Required. The customer name associated with the address.
Address Type	Required. The type of address (default choices are Alternate, Primary, or Temporary). Existing address types may be retrieved from the list or from the **lookup**.
City	Required. The city for this customer address.
Copies to Print	Optional. The number of invoice copies that will be generated for printing when Method of Invoice Transmission is Through Mail. This field will only display if Contracts and Grants Billing is turned on.
Country	Required. The country for the customer address. Existing countries may be selected from the list or from the **lookup**.
Email Address	Optional. An email address associated with this address for the customer.
International Postal Code	Optional. The applicable postal code for a customer address outside of the United States.
International Province	Optional. The name of a province for a customer address outside of the United States such as in Canada.
Invoice Template	Optional. The invoice template associated with this address. Existing countries may be selected from the list or from the **lookup**. Invoice Templates can be restricted by chart and organization. This value will display in the Transmission Details tab on the Contracts and Grants Invoice tab. This field will only display if Contracts and Grants Billing is turned on.
Method of Invoice Transmission	Optional. The method the invoice will be transmitted (Through Email or Through Mail) This value will display in the Transmission Details tab on the Contracts and Grants Invoice tab. This field will only display if Contracts and Grants Billing is turned on.
Number of Envelopes to Print	Optional. The number of envelopes that will be generated for printing when Method of Invoice Transmission is Through Mail. This field will only display if Contracts and Grants Billing is turned on.
Postal Code	Optional. The postal zip code for this customer address.
State	The state for this customer address. Existing state abbreviations may be retrieved from the list.

After entering appropriate information, **click Add button to add this address**. The system displays the new address and displays fields in which you may enter another address if desired.