State of Wisconsin

Department of Administration

Creating a Customer Job Aid

Version 1.0

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PURPOSE

This Job Aid is designed to provide additional information regarding the steps involved in creating a customer and associating a contact.

The **Create a Customer** job aid will review the following processes:

- Creating a New Customer
- Using Quick Customer Create tool

The following icons are depicted throughout this document to bring special attention to additional information, key points, and warnings.

Icon	Description	Purpose
	Additional information	Provides more information on the fields highlighted or selected on the screenshot.
	Key Points	Explains the purpose/importance of a particular field/option.
	Warning	Provides any critical information for critical fields.

CREATING A NEW CUSTOMER PROCESS

Description

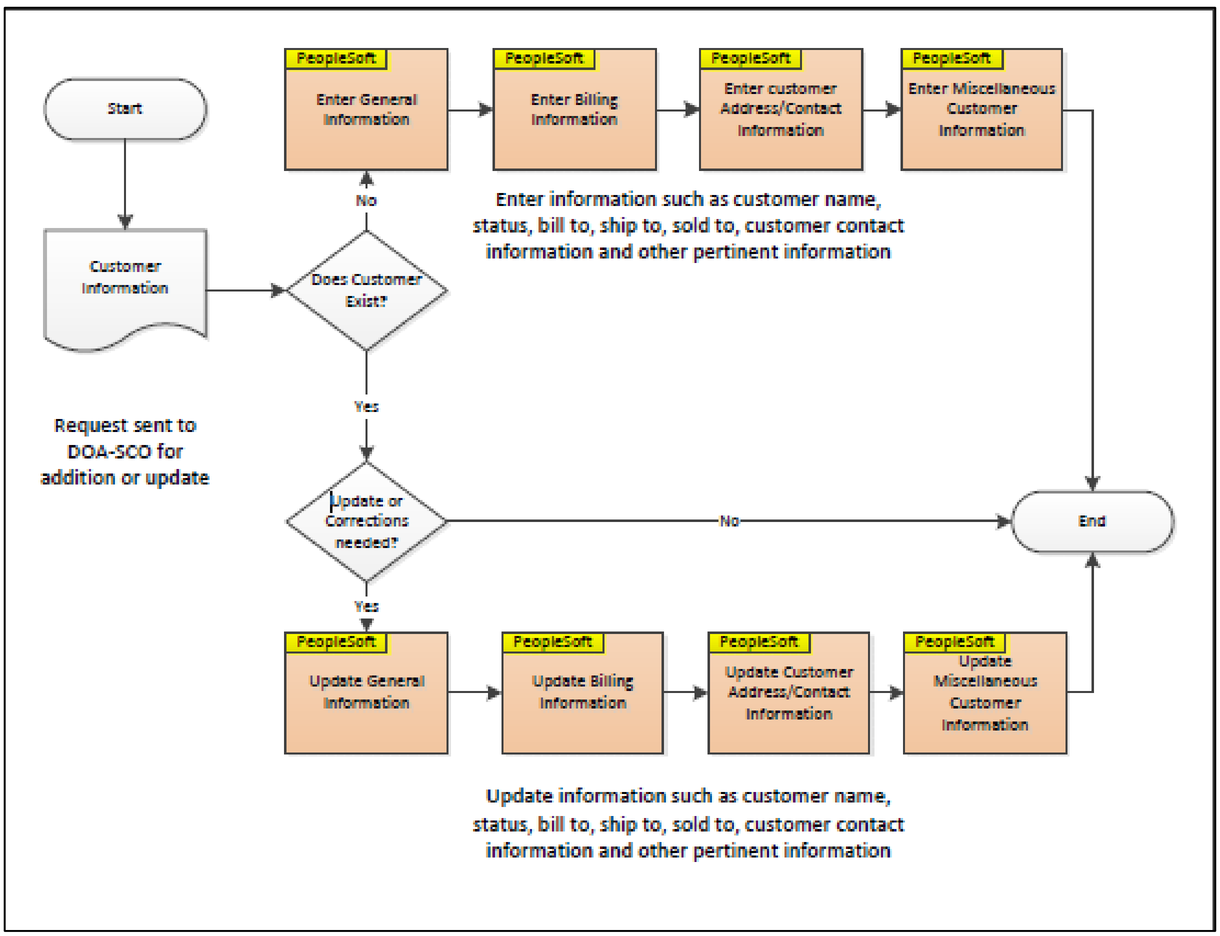
Creating a New Customer consists of two processes to add customer information into the system and link contacts to their respective customers.

The key activities involved in the Create a New Customer sub-process are:

- Verifying Existing Customers
- Adding Billing Information
- Linking Contacts

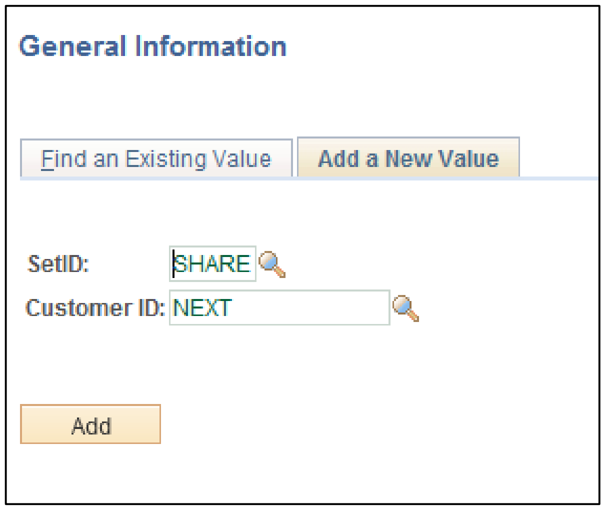
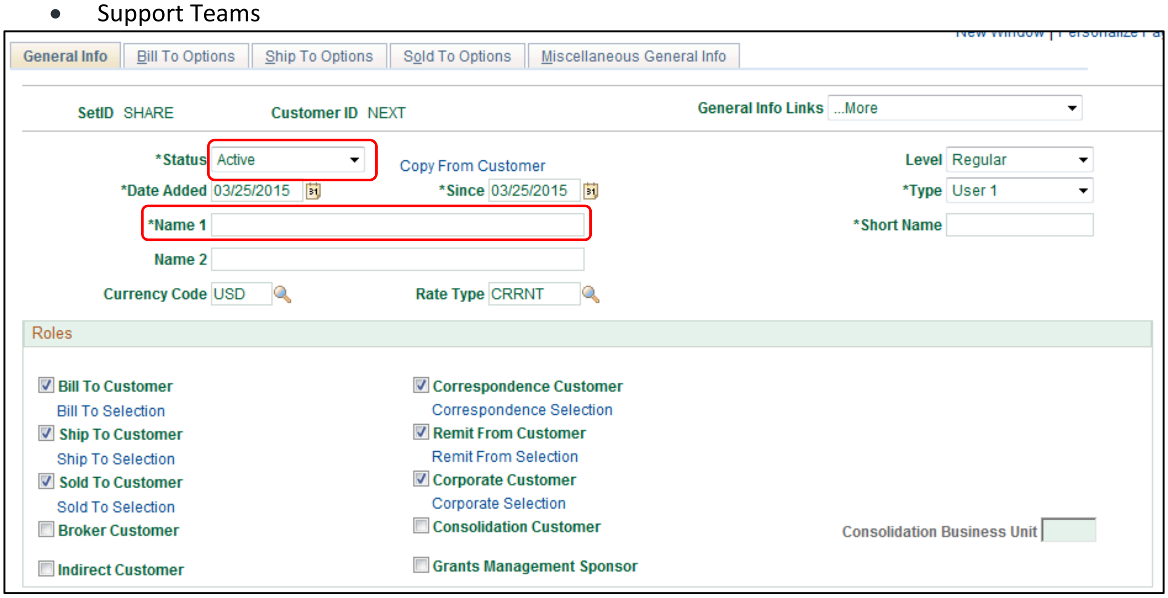
Process Flow

Given below is the business process flow for creating a new customer. This process flow will help you understand the system-generated actions as well as the tasks that are performed manually.

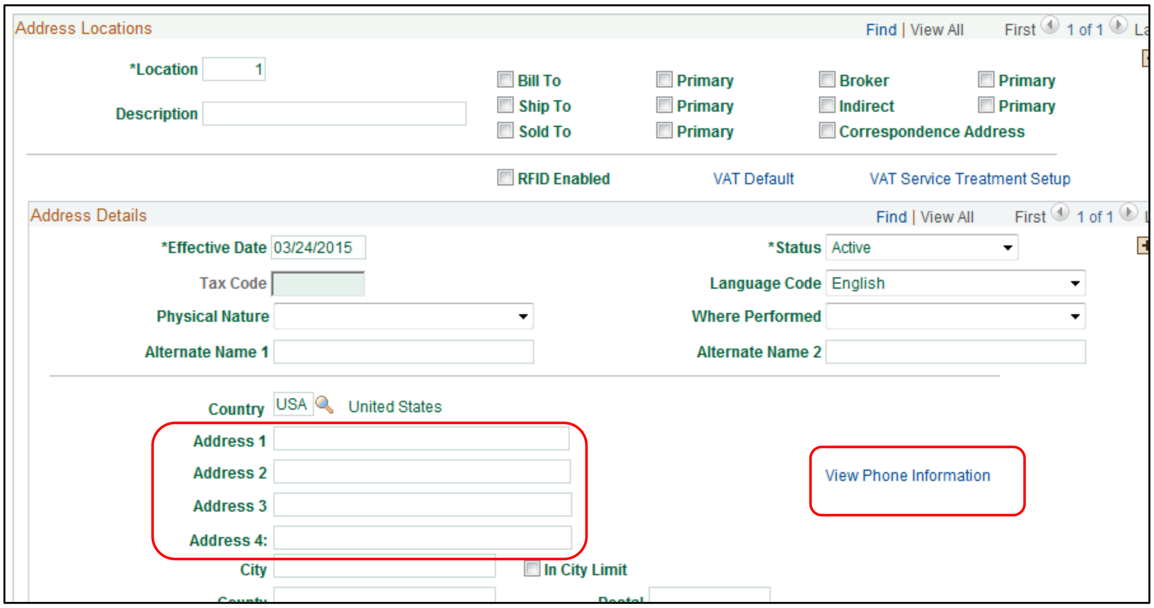


Steps

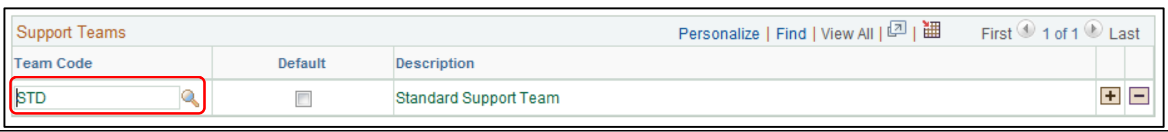
Scenario: Follow the steps explained below to create a new customer in the system and link contact information.

Step	Action
1.	In the Main Menu, navigate to: **Customer > Customer Information > General Information.**
2.	Verify available customer information in the **Find an Existing Value** tab and confirm a new customer must be added. Select the **Add a New Value** tab and click **Add.** 
3.	Enter general information about the customer, including: • Name • Status – customers must be in **Active** status to be able to be invoiced • Type – Select **Customer Type** • Address – including **Address Locations** and **Address Details** • Support Teams 

4\. Provide a short description of address type in the **Address Locations** section. Enter the customer's address and phone information in the **Address Details** section.

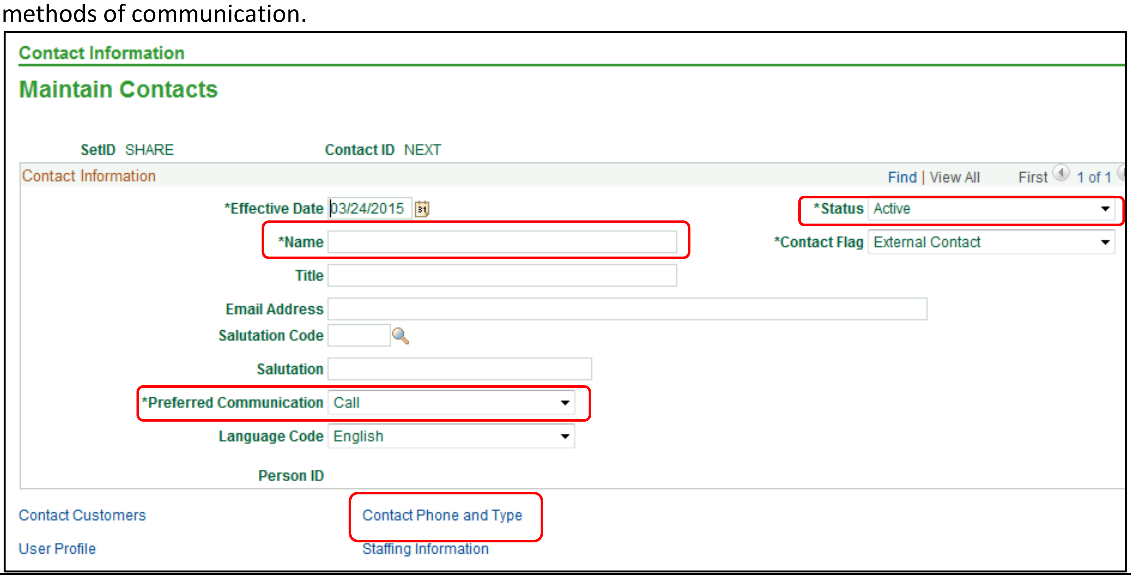


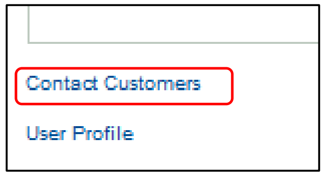
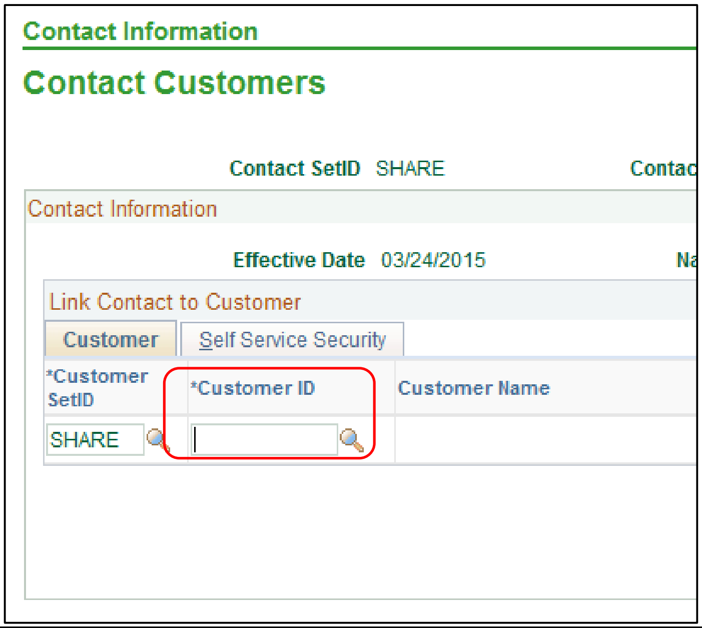
5\. Scroll down and populate the **Support Team** section with the Team Code.



6\. You have successfully added a customer in STAR. Navigate to: **Customers > Contact Information > Add a New Value** to create point of contact for your customer. Click **Add**.

7\. Use the **Maintain Contacts** page to enter details about your contact, including name and preferred methods of communication.



8.	Click on **Contact Customers** at the bottom left of the screen to define the relationship between your customer and contact. 
9.	Use this page to link the contact to the customer. Enter **Customer ID** of the new added customer. 
10.	Enter contact phone information and click **Save**. You have created a new customer and added contact information for the customer.

USING QUICK CUSTOMER CREATE

Description

Using the Quick Customer Create tool is an alternative way of quickly creating customers and contacts in a single page, using a previously established customer template with relevant fields to populate.

Steps

Scenario: Using the Quick Customer Create tool, follow the steps below to add a new customer and linked contact to the system using a Customer Template.

Step	Action
1.	In the Main Menu, navigate to: **Customer > Customer Information > Quick Customer Create.**
2.	Click **Create New Customer/Contact** at the bottom right of the screen.

3.	Choose the **Template Customer** to populate required fields in contact information.
4.	Enter Contact Information for contact associated with the customer in the **Enter Contact Information** section.
5.	Populate the **Customer Information** and **Address Details** sections. Leave **Customer ID** blank to have the system assign a value.
6.	Click **Save New Customer/Contact**. You have successfully created a new customer and contact.

APPENDIX

Customer Types

Customer Type	Responsibility
Bill to Customer	The customer that receives the invoices.
Broker	The ordering body for the Sold to Customer.
Consolidated Customer	The customer used for consolidated invoicing in Billing.
Corporate Customer	The parent customer for analyzing total Accounts Receivable Exposure
Correspondence Customer	The customer that receives the mail.
Indirect Customer	The ultimate recipient of goods or services.
Remit from Customer	The paying entity.
Ship to Customer	The customer that receives the goods or services.
Sold to Customer	The customer that places the orders.

Billing Information Types

Refer to the below table for key terms in billing and payment options for creating new customers.

Billing Information Type	Purpose
Bill by Identifier	Bill by Identifier defines how to group billing activity on invoices. These billing activities can be grouped by: Customer, Bill Source, Bill Type, or Business Unit.
Bill Type	Bill Types represent categories of billing activities grouped on a particular bill. A Bill Type can be represented by the different services your organization performs.
Payment Method	Payment Method describes how the invoice will be paid by the customer.
Payment Options	Payment Options provide more in-depth information for the entities that bill, ship, and receive the order.
Payment Terms	Payment Terms establish time increments in which the invoice must be paid.