AR2 Customer Management

Activities

Version 2.0 | *December 8, 2014*

Activity #1 - How to: Enter a New Customer

Navigation: Customers > Customer Information > General Information.

1. Click the *Add a New Value* tab.
    a. Verify the **Set ID**
    b. Leave **Customer ID** set to NEXT.
2. Click **Add**
3. On the General Info tab, enter the following:
    - **Status:** *Active*
    - **Date Added:** *Enter 1st day of current month*
    - **Since:** Enter *01/01/2012*
    - **Name 1:** *Create any name*
    - **Type:** Select *User 1* (default).
    - **Short Name:** *Shorten the name somehow*
    - **Currency Code:** Type *USD*.
    - **Rate Type:** Type *CRRNT*.

What name did you choose? ____________________________________

4. In the Roles area, click the **Bill To Customer** checkbox.
5. In the Support Teams and Address Locations areas, enter the following:
    - **Team Code:** Enter *IBS_AR*
    - Check the **Default** checkbox
    - **Location:** default to *1*.
    - **Description:** *This is optional*
    - Check: **Bill To**, **Primary**, and **Correspondence Address**
6. In the Address Details area, enter the following:
    - **Effective Date:** *Enter 1st day of current month*
    - **Status: Active**
    - **Country, Address, City, State, and Postal:** *Create one.*
7. Click **Save**.
8. Click the *Bill To Options* tab. Verify/enter the **Effective Date** (defaults to current date) and **Status** (defaults to *Active*).
9. On the **Bill To Options** tab, in the Responsibilities area, select the contacts for:

- **Credit Analyst**
- **AR Specialist**
- **Billing Specialist**
- **Collector**

10. In the **Billing Options** area, verify that **Direct Invoicing** is checked (default) and that the **Freight Bill Type** is set to *Shipping* (default).
11. In the **Write-Off** Info area,
    a. Change the **Maximum Write-Off Amount** from *9999999999999.990* to "*0*".
    b. Change the **Maximum Write-Off Percent** from *100* to "*0*". The before and after screenshot is shown here.
12. Click **Save**.

What is your **Customer ID**? ________________________________

Activity #2 How Add a New Customer Using Quick Customer

Navigation: Main Menu > Customers > Customer Information > Quick Customer Create

1. Click **Create New Customer/Contact** hyperlink next to Search button.
2. Click the **Template Customer** lookup. Search for a customer that already exists in the system.
3. Enter new customer and contact information:
    - **Name** and **Telephone**
    - Click **Create Contact** checkbox
    - **Email Address**
    - **Customer Name** and **Short Name.**

What is your customer name? ______________________

- Click the **Create Customer** checkbox

4. In the Address Details area, enter *USA* in the **Country** field.
5. Create an **address**
6. Click **Save New Customer/Contact**.
    a. Verify that "*Successfully created new customer and contact. Below is the summary*" appears in red text at the top of the screen.

What is your new Customer ID #? _______________________

7. Click the **Customer Information Update** link in the lower section.
    - Verify that the address that appears is for the new customer.
    - IMPORTANT: Verify the **Date Added** and **Since** dates.
    - Save if you make any edits/changes.

Activity #3 - Enter a Customer Conversation

Navigation: Main Menu > Customers > Conversations > Update Conversations

1. Verify that no previous conversation exists or use this to continue conversations. On the Find Existing Value tab, enter the **SetID** and **Business Unit.** Click **Search.**
2. If no matching values exists, start a new conversation by clicking *Add a New Value* tab.
   - Enter the **SetID**
   - **Business Unit**
   - **Customer ID** Select any customer
3. Click **Add**.
4. On the Conversations tab, enter information. If a conversation already exists, click **Add Conversation Entry.**

   At top of screen enter:

   - **Status:** Select the *Closed*, *New*, or *Open*. This is the status of the conversation.
   - **Description:** Type a description. *Example: Late Payment.*
   - **Subject:** Type a subject. *Example: LATE PAYMENT.*

   In the *Conversation Entries* section enter:

   - **Contact ID**
   - **Comments**

3. If all information is complete, click **Save**