Customer Creation Procedures

Prior to invoicing, it is necessary to determine if your customer exists in the Kuali Financial System (KFS) or if you need to create a new customer account. The easiest way to check is to do a search based on the Customer Name. It is recommended to use the * (wild card) around your search word(s).
Non-Student Accounts Receivable Customer Creation

If it looks like your customer, you can click on the Customer Number hyperlink and view the address, phone numbers and contact information to confirm it indeed is the right account. Make note of the Customer Number, which will be required to create the invoice(s). If the proper customer is not on the search results then you will need to create a new customer via the button on the upper right corner in the Customer Lookup:

Fields to be completed when creating a new customer (required fields are denoted in KFS with a *):

- Customer Name in Last Name, First Name convention for an individual
- Customer Type – select from drop down
- Collection Status – select “CURRENT”
- Active Indicator – be sure box is checked
- FEIN or SSN if available
- Birth Date if available
- Email Address
- Contact Name
- Contact Phone Number
- Address – typically Type is Primary
**Non-Student Accounts Receivable Customer Creation**

**SAMPLE:** New Customer eDoc

<table>
<thead>
<tr>
<th><strong>Customer</strong></th>
<th><strong>Doc Nbr:</strong> 7581245</th>
<th><strong>Status:</strong> INITIATED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Initiator:</strong> cmd03015</td>
<td><strong>Created:</strong> 12:23 PM 05/16/2018</td>
</tr>
</tbody>
</table>

**Document Overview**

- **Description:** New KPS Customer Org 1557 Doe, John
- **Explanation:** Create new customer John Doe to invoice for space rental - month of April 2018

**General Information**

- **Customer Number:**
- **Customer Name:** Doe, John
- **Customer Type:** 10 - Individual-other
- **Customer Alias1:**
- **Customer Alias2:**
- **Collection Status:** CURRENT
- **Last Collection Status Change Date:**
- **Active Indicator:**
- **Customer Record Add Date:**
- **Last Activity Date:**
- **Last Address Change Date:**

**Corporate Information**

- **Tax Number:**
- **Tax Number Type:** FEIN, SSN, NONE
- **Tax Exempt Indicator:**
- **Credit Approved By:**
- **Credit Limit Amount:**
Any questions regarding creation of customers should be directed to the Accounts Receivable Office at accountsreceivable@uconn.edu or 860.486.5995.

Correct Naming Convention
Last name, First name

Email Address is a required field
This field is necessary in order for customers to receive e-statements

Important to enter Notes anytime there is activity on an account, i.e., make notes of phone calls, attach email correspondence, or other documentation