UCONN
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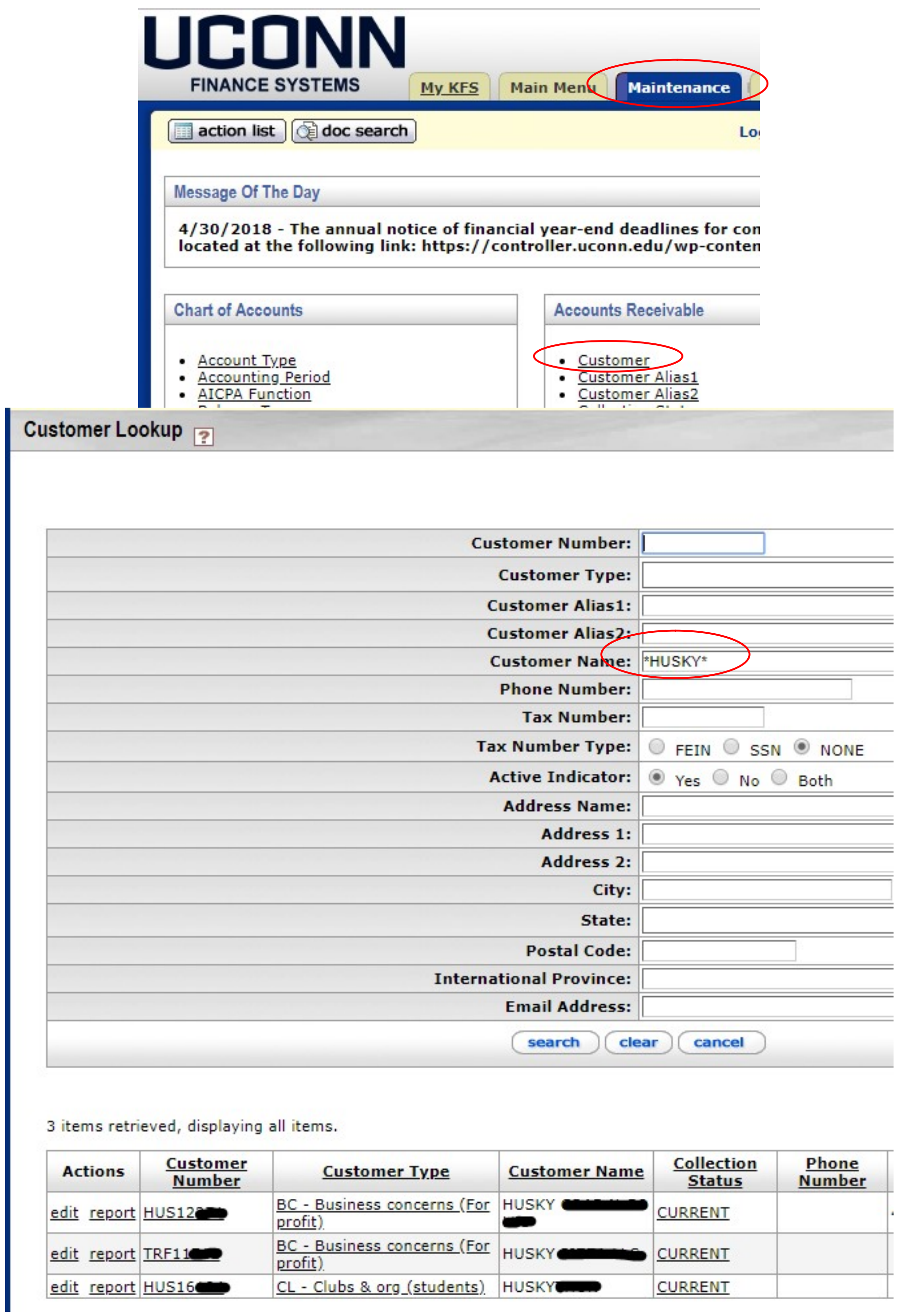
Non-Student Accounts Receivable Customer Creation

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).



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

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SAMPLE: New Customer eDoc

Customer

Doc Nbr:	7581245	Status:	INITIATED
Initiator:	amp03015	Created:	12:23 PM 05/16/2018

expand all | collapse all

* required field

Document Overview

hide

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

General Information

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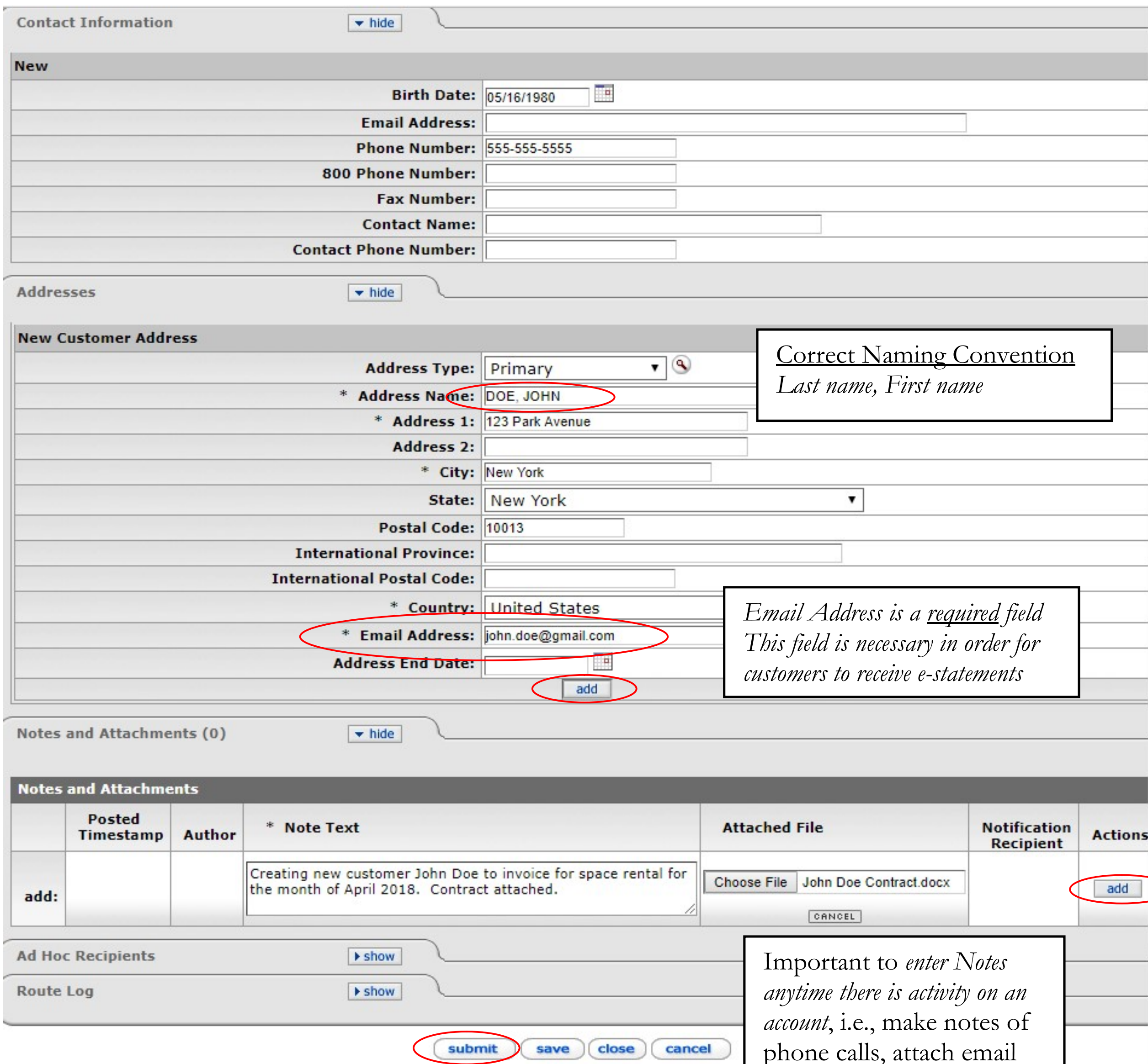
New	
Customer Number:	
* Customer Name:	Doe, John
* Customer Type:	IO - Individual-other
Customer Alias1 Type:	
Customer Alias1:	
Customer Alias2 Type:	
Customer Alias2:	
* Collection Status:	CURRENT
Last Collection Status Change Date:	
Active Indicator:	☑
Customer Record Add Date:	
Last Activity Date: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

Corporate Information

hide

New	
Tax Number:	
Tax Number Type:	○ FEIN ○ SSN ◉ NONE
Tax Exempt Indicator:	☐
Credit Approved By:	
Credit Limit Amount:	



<u>Correct Naming Convention</u>
Last name, First name

Email Address is a <u>required</u> 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

Any questions regarding creation of customers should be directed to the Accounts Receivable Office at accountsreceivable@uconn.edu or 860.486.5995.