

Non-Student Accounts Receivable Customer Creation

Customer Creation Procedures

Prior to invoicing, it is necessary to determine if your customer exists in the Quali 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).

Customer Lookup ?

Customer Number:

Customer Type:

Customer Alias1:

Customer Alias2:

Customer Name: *HUSKY*

Phone Number:

Tax Number:

Tax Number Type: FEIN SSN NONE

Active Indicator: Yes No Both

Address Name:

Address 1:

Address 2:

City:

State:

Postal Code:

International Province:

Email Address:

3 items retrieved, displaying all items.

Actions	Customer Number	Customer Type	Customer Name	Collection Status	Phone Number
edit report	HUS12[REDACTED]	BC - Business concerns (For profit)	HUSKY [REDACTED]	CURRENT	
edit report	TRF11[REDACTED]	BC - Business concerns (For profit)	HUSKY [REDACTED]	CURRENT	
edit report	HUS16[REDACTED]	CL - Clubs & org.(students)	HUSKY [REDACTED]	CURRENT	

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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:
Organization Document Number:		Create new customer John Doe to invoice for space rental - month of April 2018

General Information
▼ hide

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:	<input checked="" type="checkbox"/>
Customer Record Add Date:	
Last Activity Date:	
Last Address Change Date:	

Corporate Information
▼ hide

New

Tax Number:	
Tax Number Type:	<input type="radio"/> FEIN <input type="radio"/> SSN <input checked="" type="radio"/> NONE
Tax Exempt Indicator:	<input type="checkbox"/>
Credit Approved By:	
Credit Limit Amount:	

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Contact Information hide

New

Birth Date: 05/16/1980

Email Address:

Phone Number: 555-555-5555

800 Phone Number:

Fax Number:

Contact Name:

Contact Phone Number:

Addresses hide

New Customer Address

Address Type: Primary

* Address Name: DOE, JOHN Correct Naming Convention
Last name, First name

* Address 1: 123 Park Avenue

Address 2:

* City: New York

State: New York

Postal Code: 10013

International Province:

International Postal Code:

* Country: United States

* Email Address: john.doe@gmail.com Email Address is a required field
This field is necessary in order for
customers to receive e-statements

Address End Date:

Notes and Attachments (0) hide

Posted Timestamp	Author	* Note Text	Attached File	Notification Recipient	Actions
add:		Creating new customer John Doe to invoice for space rental for the month of April 2018. Contract attached.	Choose File John Doe Contract.docx		<input type="button" value="add"/>

Ad Hoc Recipients show

Route Log show

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.