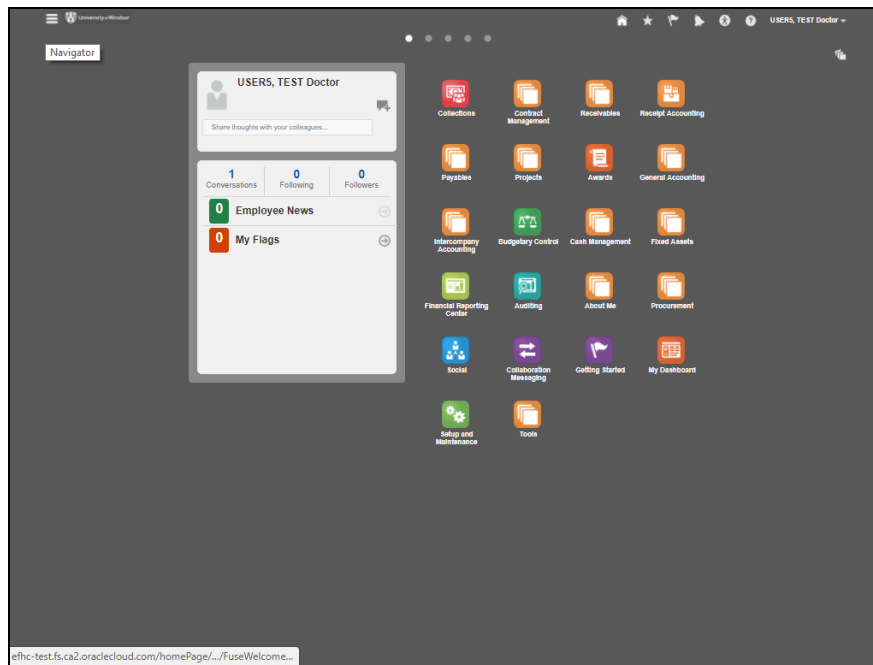



**AR 01: Manual creation of a customer within the Receivables module  
Created on 3/2/2018**

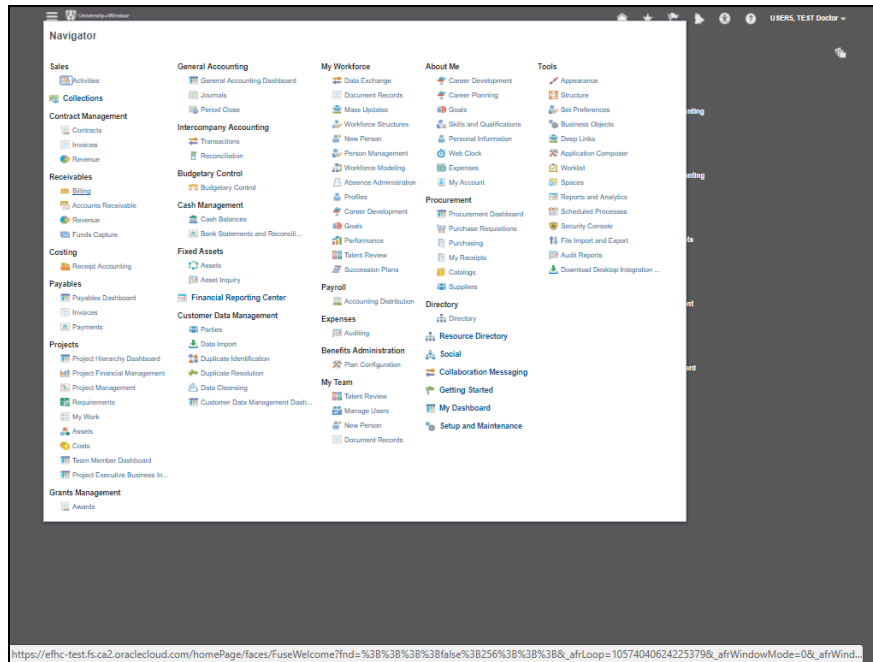
## AR 01: Manual creation of a customer within the Receivables module


### Procedure

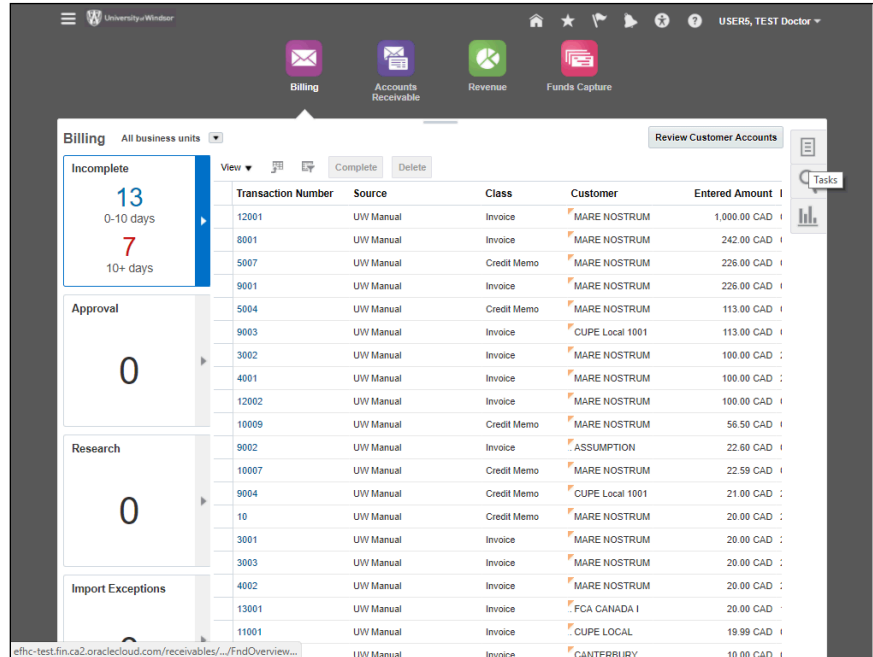
This User Guide outlines the steps required to perform manual creation of a customer within the Receivables module.




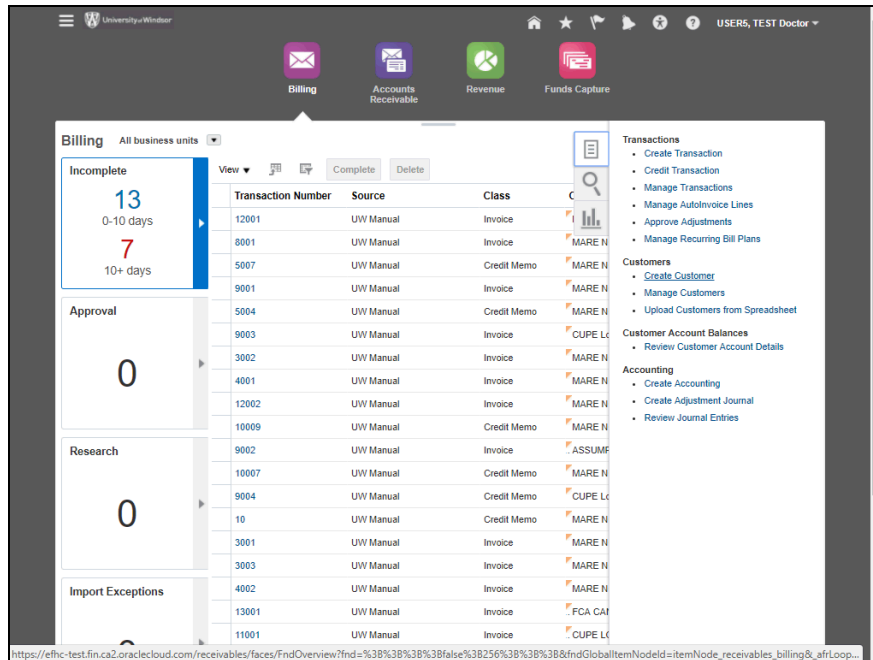
Step	Action
1.	Click the <b>Navigator</b> button. 



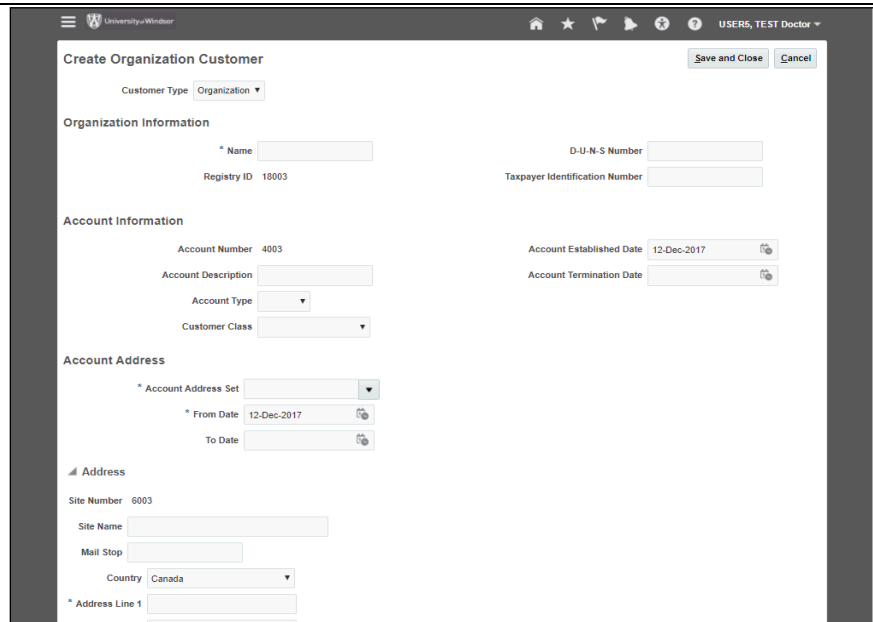
Step	Action
2.	Click the <b>Billing</b> link. 



Step	Action
3.	Click the <b>Tasks</b> button. 



Step	Action
4.	Click the <b>Create Customer</b> link. <a href="#">Create Customer</a>



Step	Action
5.	Enter the appropriate information into the following fields: <b>Name</b> <b>D-U-N-S Number</b> <b>Taxpayer Identification Number</b> <b>Account Description</b>

Step	Action
6.	Click the <b>Account Type</b> drop-down button. Select the appropriate option from the drop-down list.

Step	Action
7.	Click the <b>Customer Class</b> drop-down button. Select the appropriate option from the drop-down list.

Step	Action
8.	Click the <b>Account Address Set</b> drop-down button. Select the appropriate option from the drop-down list.

Step	Action
9.	Enter the appropriate information into the following fields: <b>Site Name</b> <b>Address Line 1</b> <b>City</b> <b>Province</b>

Step	Action
10.	Click the <b>Site Language</b> drop-down button. Select the appropriate option from the drop-down list.

Step	Action
11.	Click in the <b>Translated Customer Name</b> field.

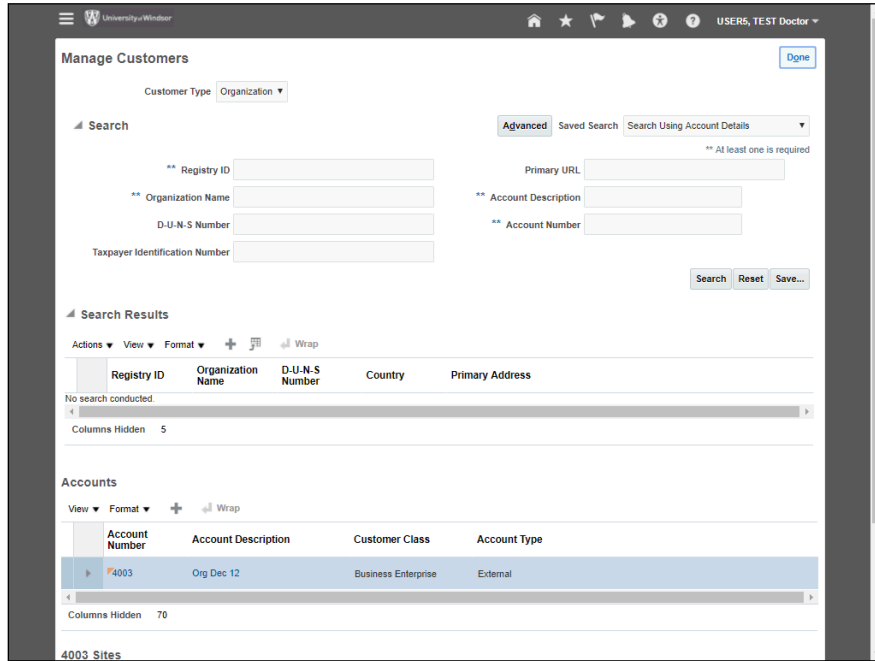
The screenshot shows a web form for creating a customer. At the top, there are dropdowns for 'Account Address Set' (UW\_DATASET) and 'From Date' (12-Dec-2017). Below this is an 'Address' section with fields for Site Number (6003), Site Name (Site Org 12), Mail Stop, Country (Canada), Address Line 1 (Street 1), Address Line 2, Address Line 3, City (Calgary), Province (Alberta), and Postal Code. The 'Account Address Details' section includes Customer Category Code, Site Language (American English), Translated Customer Name (empty), and checkboxes for Key Account, Trading Partner Identifier, and EDI Location Code. At the bottom, there is an 'Address Purposes' table with columns: Primary, Site, From Date, To Date, Purpose, and Bill-to Site. The table currently shows 'No data to display.'

Step	Action
12.	Enter the required translated customer name in the <b>Translated Customer Name</b> field.

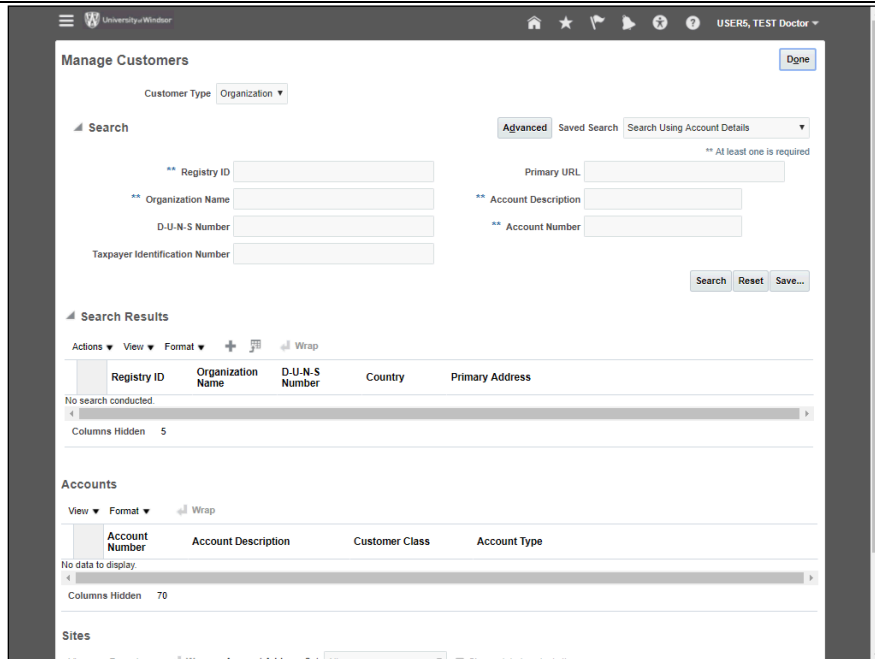
This screenshot shows the same 'Create Organization Customer' form, but with additional fields filled out. The 'Organization Information' section includes Name (Org 12), Registry ID (18003), D-U-N-S Number (1234), and Taxpayer Identification Number (4321). The 'Account Information' section includes Account Number (4003), Account Description (Org Dec 12), Account Type (External), Customer Class (Business Enterprise), Account Established Date (12-Dec-2017), and Account Termination Date. The 'Address' section is partially visible at the bottom. The 'Save and Close' button at the top right is highlighted in blue.

Step	Action
13.	Click the <b>Save and Close</b> button. <a href="#">Save and Close</a>





Step	Action
14.	Click the <b>Done</b> button.



Step	Action
15.	<b>End of Procedure.</b>