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

Created on 3/2/2018

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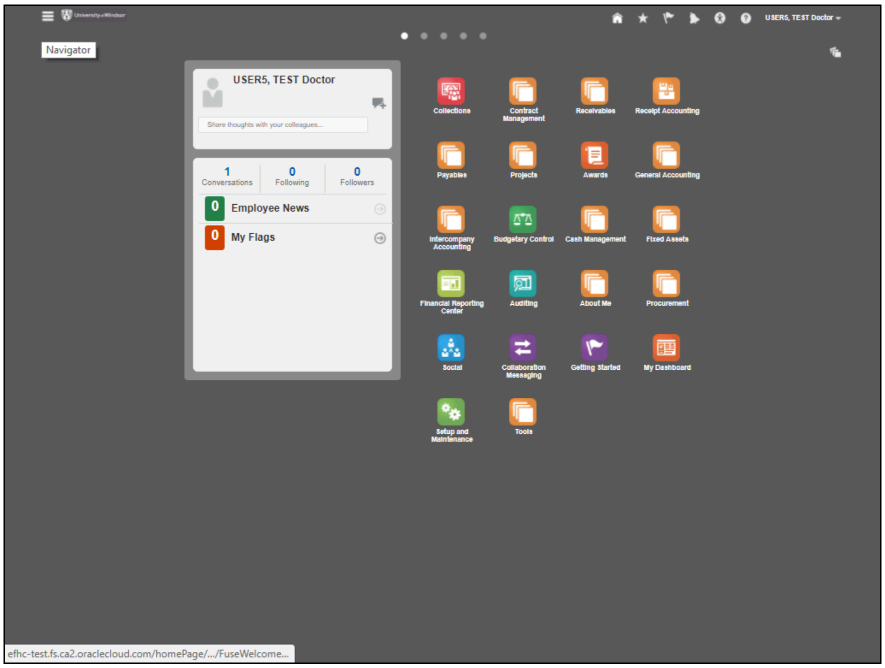
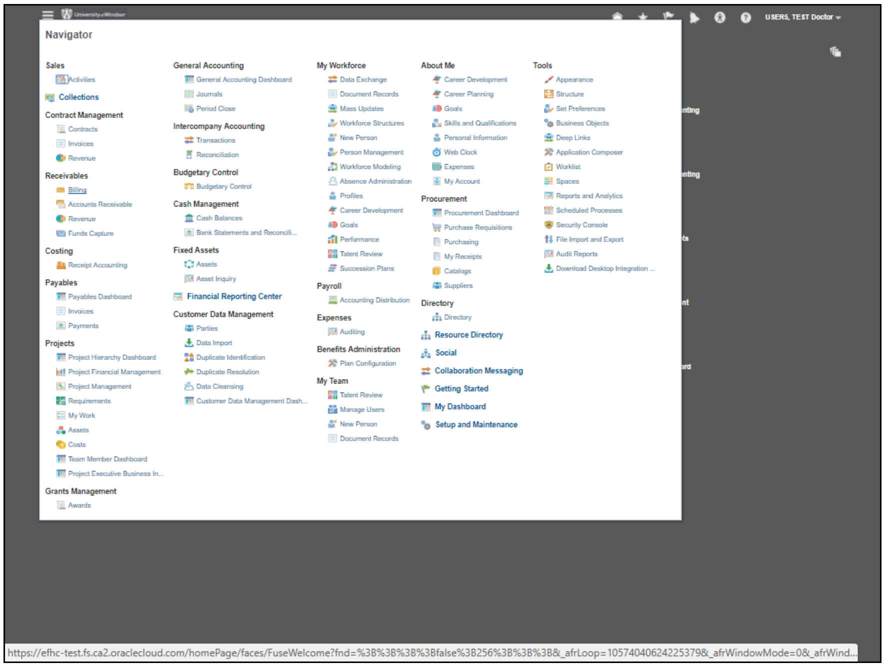
Procedure

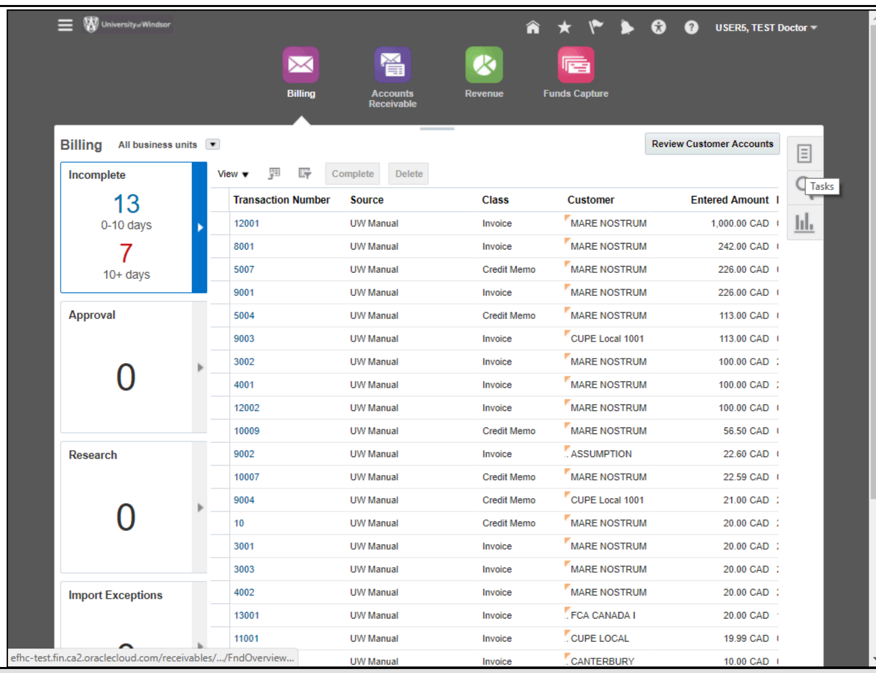
This User Guide outlines the steps required to perform manual creation of a customer within the Receivables module.



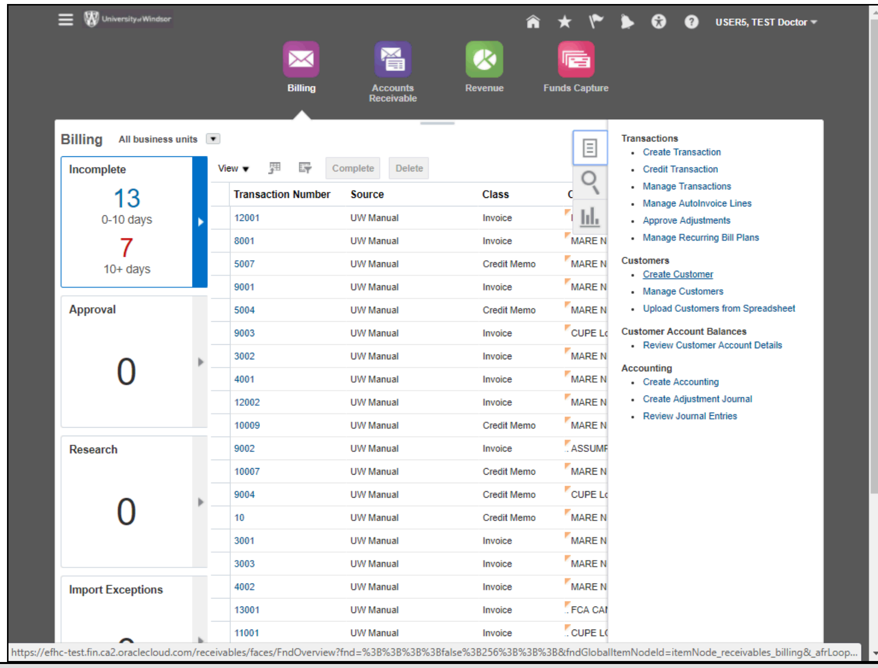
Step	Action
1.	Click the **Navigator** button. 



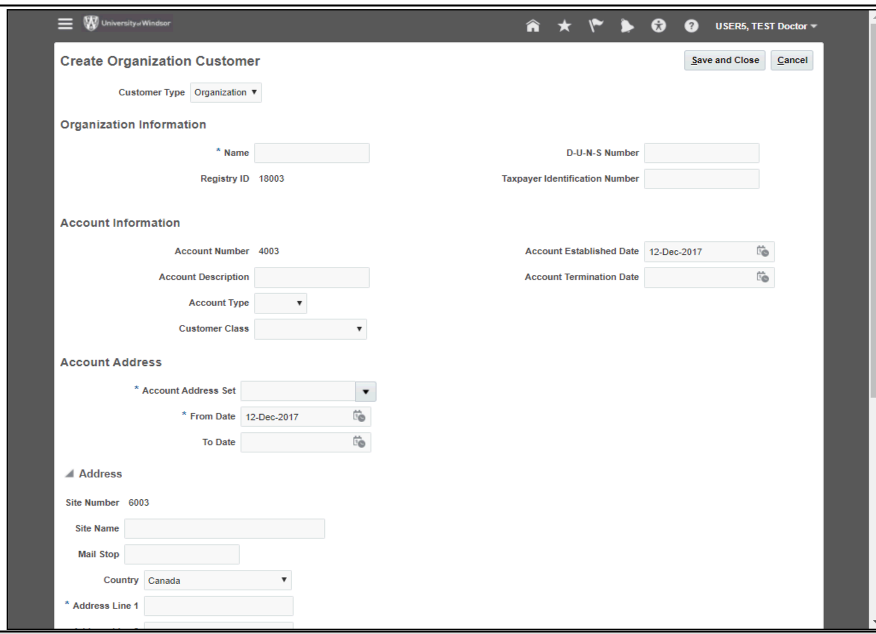
Step	Action
2.	Click the **Billing** link. Billing



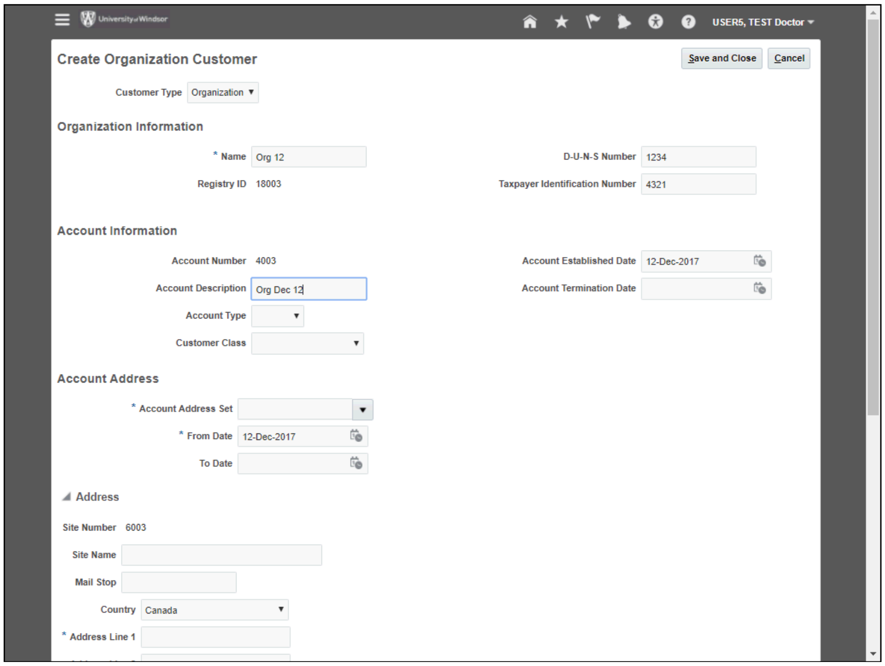
Step	Action
3.	Click the **Tasks** button.



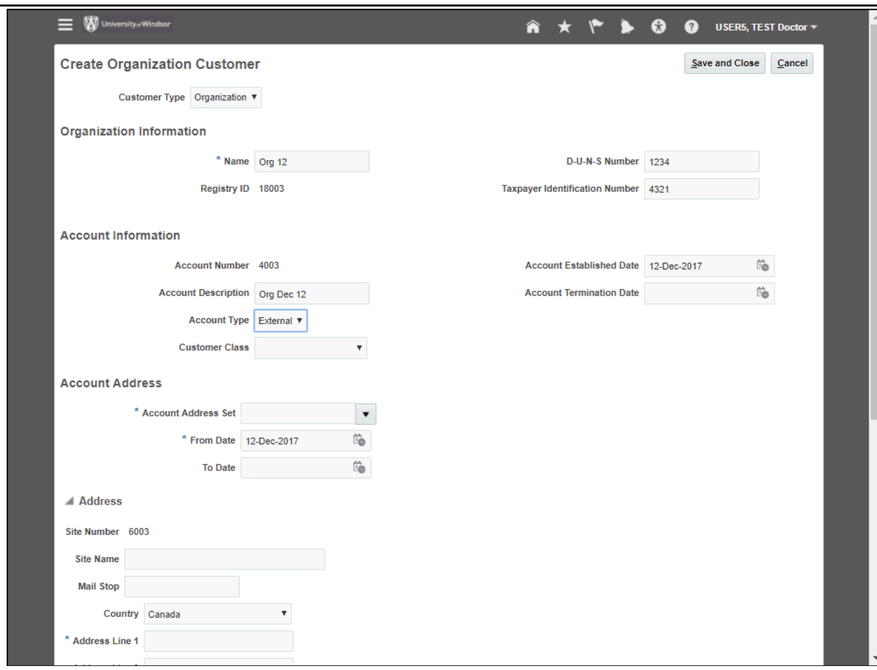
Step	Action
4.	Click the **Create Customer** link. Create Customer



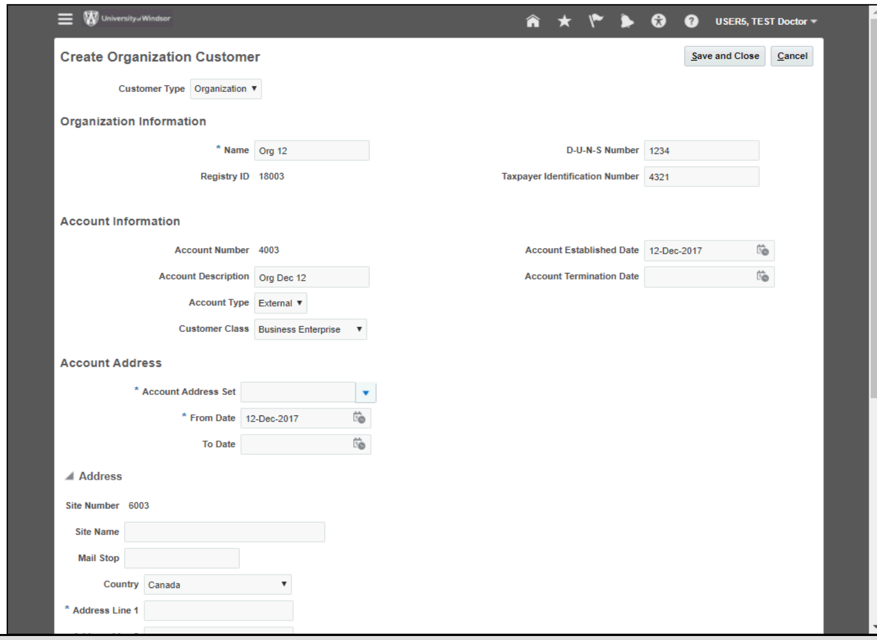
Step	Action
5.	Enter the appropriate information into the following fields: **Name** **D-U-N-S Number** **Taxpayer Identification Number** **Account Description**



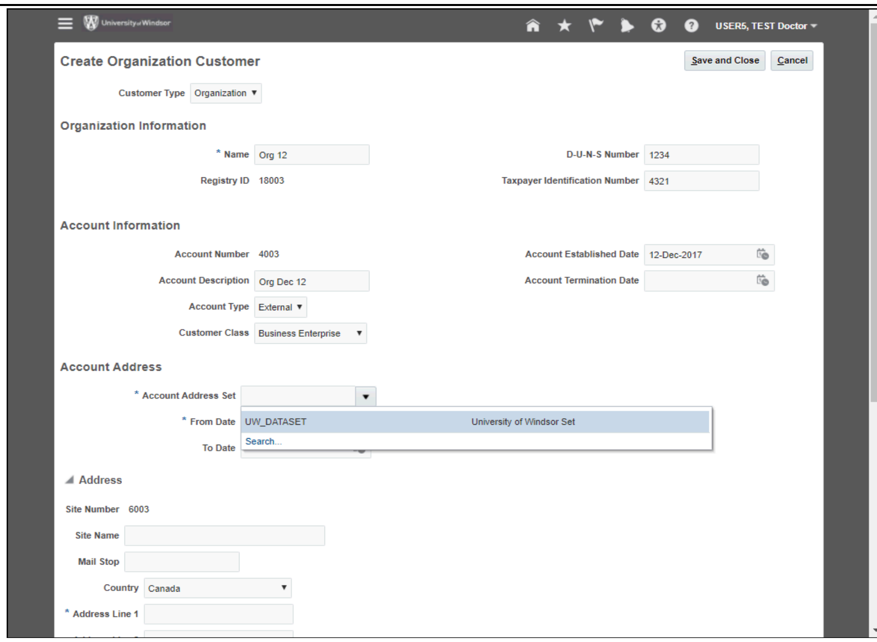
Step	Action
6.	Click the **Account Type** drop-down button. Select the appropriate option from the drop-down list.



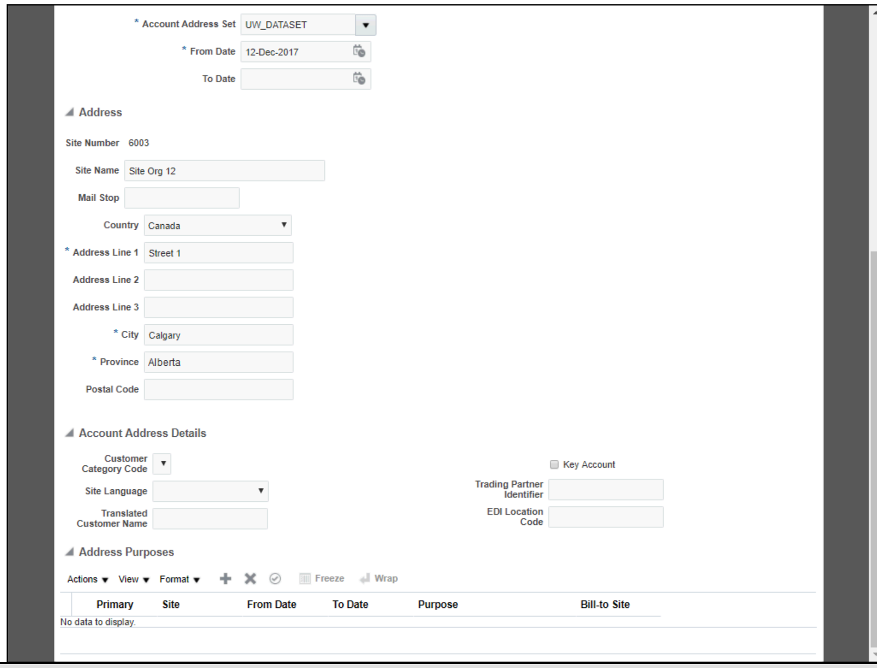
Step	Action
7.	Click the **Customer Class** drop-down button. Select the appropriate option from the drop-down list.



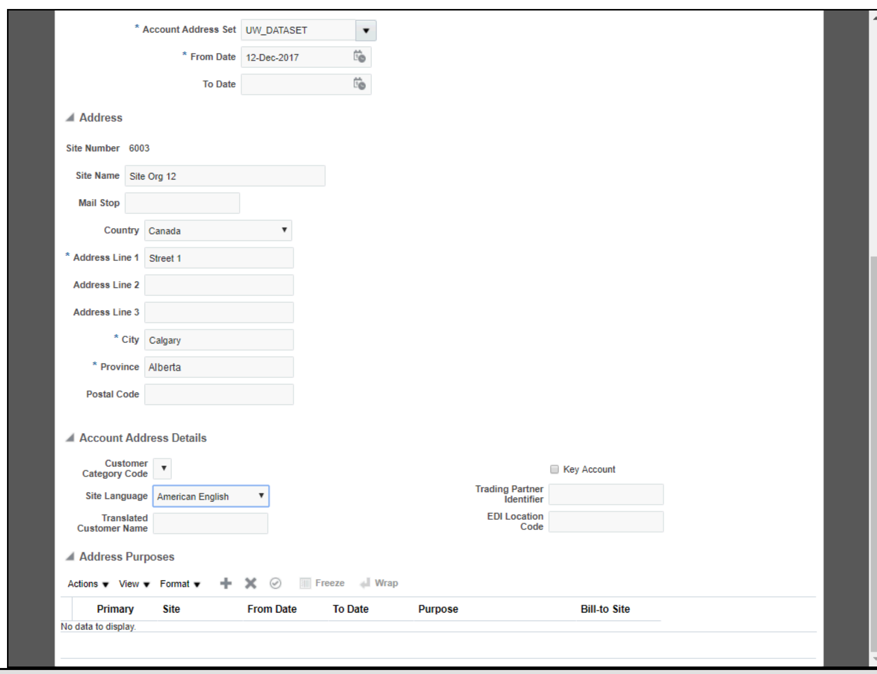
Step	Action
8.	Click the **Account Address Set** drop-down button. Select the appropriate option from the drop-down list.



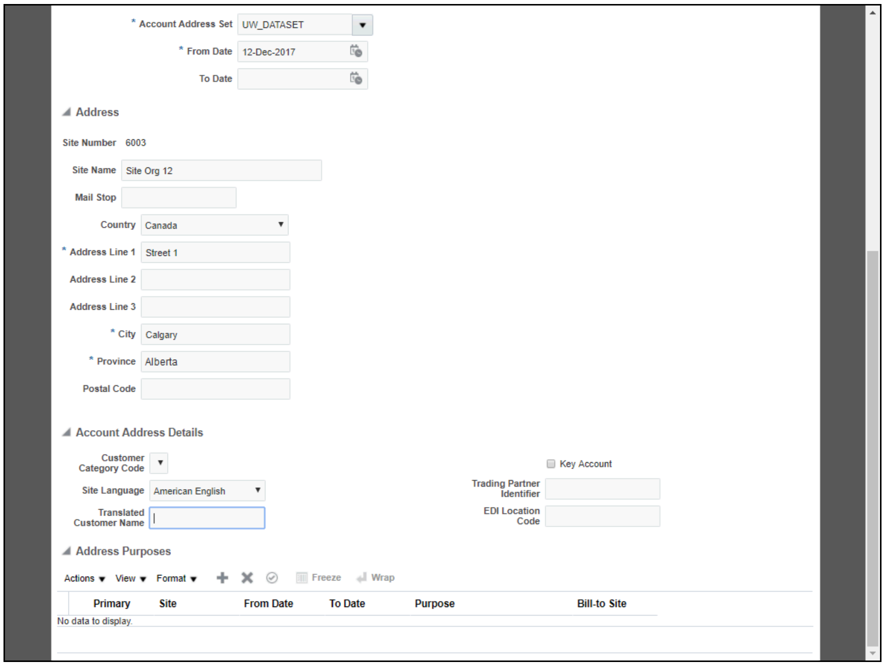
Step	Action
9.	Enter the appropriate information into the following fields: **Site Name** **Address Line 1** **City** **Province**



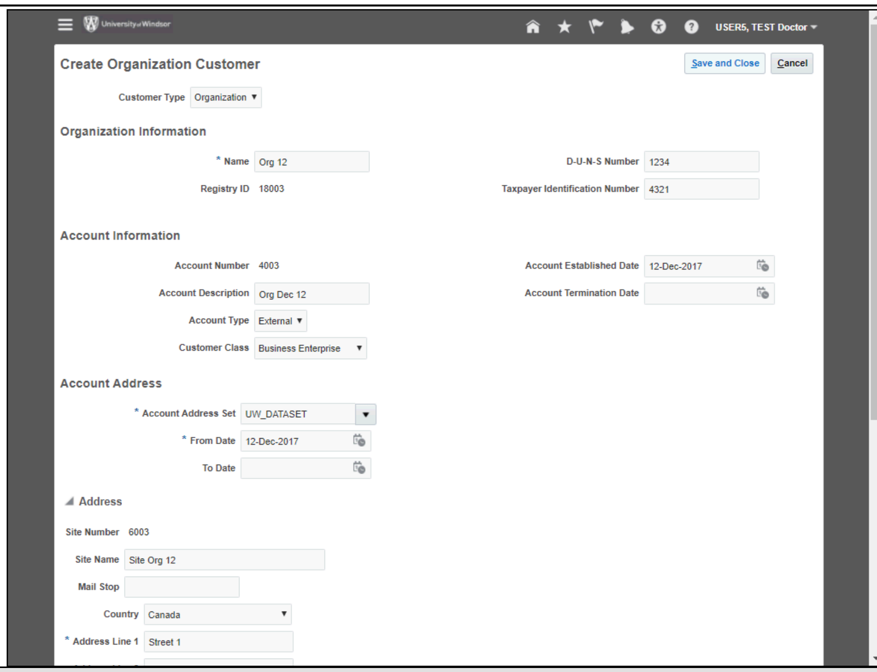
Step	Action
10.	Click the **Site Language** drop-down button. Select the appropriate option from the drop-down list.



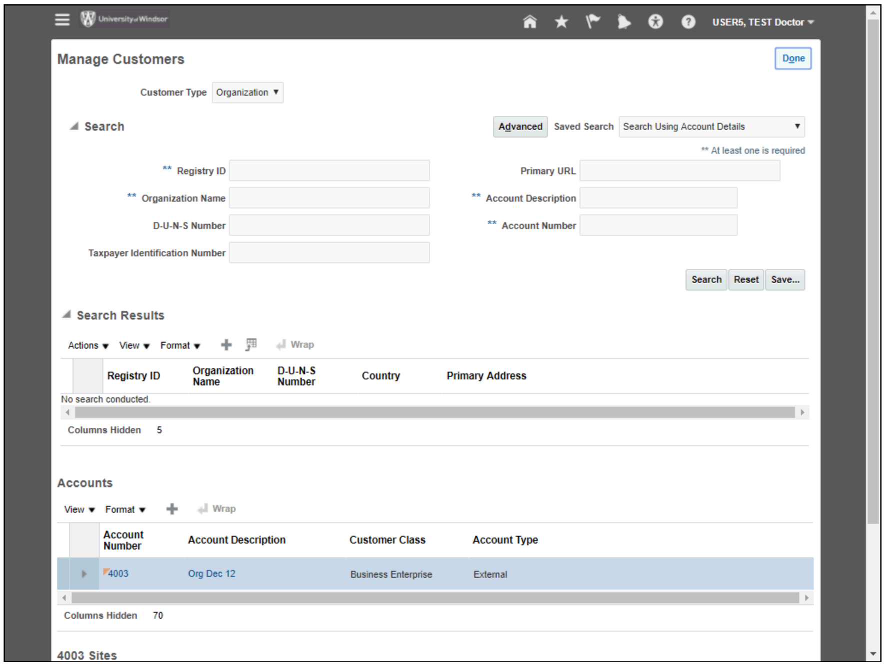
Step	Action
11.	Click in the **Translated Customer Name** field.



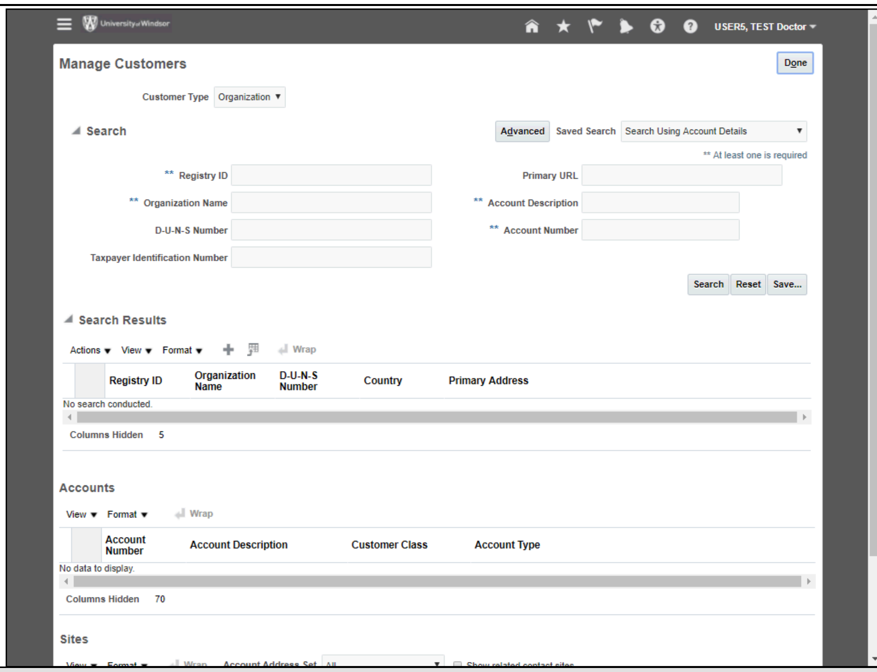
Step	Action
12.	Enter the required translated customer name in the **Translated Customer Name** field.



Step	Action
13.	Click the **Save and Close** button. Save and Close



Step	Action
14.	Click the **Done** button. Done



Step	Action
15.	**End of Procedure.**