Check if a Customer Account Exists
1. Open Web Browser, navigate to OFC Home Page
2. Enter User Name and Password, click Login
3. Select Receivables, then Accounts Receivable
4. Click on Tasks menu
5. In Customers, select Manage Customer
6. Enter Wartburg_<your 3 initials> in the Organization Name and click Search
7. If No results found, click on Advanced and try searching again by using other available search options: modifying parameters by Starts with, Equals, Contains, Is blank or is not blank, once the criteria is entered, click on Search to view results; no action required for exercise
Create a New Customer Account

1. After an exhaustive search for an existing Customer is complete, create a new Customer account
2. In Search Results, in Actions, select Create or click on the + symbol

3. Complete the fields for Create Organization Customer profile:
   a. In Customer Type: select Organization
   b. In Name: enter: Wartburg_<your 3 initials>
   c. In Account Description: enter Training
   d. In Account Type: select External
   e. In Customer Class: select Private
   f. In Account Address Set: select Enterprise

4. Scroll down to the Address section, and enter information provided in screenshot
5. In **Account Address Details**, in **Customer Category Code**, select **Non-Federal**

6. In the **Address Purposes, Actions** select **Add Row**

7. In **Purpose**, select **Bill to**, and click the check mark to set as **Primary**

8. Click **Save and Close** in the top right corner

9. Scroll down to the **Accounts** section and click on the newly created **Account Number**

   *Note: if the account number is not displayed, perform a **Search** to find the newly created **Customer**, search Wartburg_your initials, then click on **Account #** to proceed*

10. In **Account Information**, click **Communication**, and **Edit Contacts**
Create Customer Account
Accounts Receivable

11. In Edit Contacts, Actions, select Create Contact

12. In Create Contact dialog box, enter your First Name, Last Name, in Role Type select Contact, click OK
   a. Account Contact created, click the check mark to set yourself as the Primary Contact

13. In Contact Points, select Actions and Create

   a. Select Phone as the Contact Point Type and type in (123) 456-7890

14. Repeat Step #14 above to create a second Contact Point with Email as the Contact Point Type
    and enter your UCSD email
15. In **Account Contact Responsibilities**, in **Actions**, select **Add Row**

   ![Account Contact Responsibilities](image1)

   a. In **Responsibility Type**, select **Bill to**, click the check mark to set as **Primary Responsibility**

16. In **Addresses** section at the bottom of the page, click the plus **+ symbol**

   a. In the **Create Address** dialog box, enter **12345 Test Drive, Nowhere, CA 92037**
   b. In **Address Purposes**, click **+ symbol**, to add row, in **Purpose**, select **Bill to**, and click **OK**

17. Scroll up to the top, in upper right, click **Save and Close**, twice, and then **Done**

**Helpful Tips:**

- **Customer Accounts** may have multiple **Sites** and multiple **Contacts** (per site as well)
- An incomplete **Customer Account** will prohibit the use of additional system functionality (i.e. Invoice, Receipt, Project, etc.)
  - A **Primary: Contact, Contact Point** and assigned **Contact Responsibility** are required
  - **Bill-to** must be designated before Customer invoicing may occur
- There will be multiple **Contact Responsibilities** assigned to allow for full-cycle Accounts Receivable operations (i.e. Bill to, Statements, Dunning Letters, etc.)