

University of the Philippines

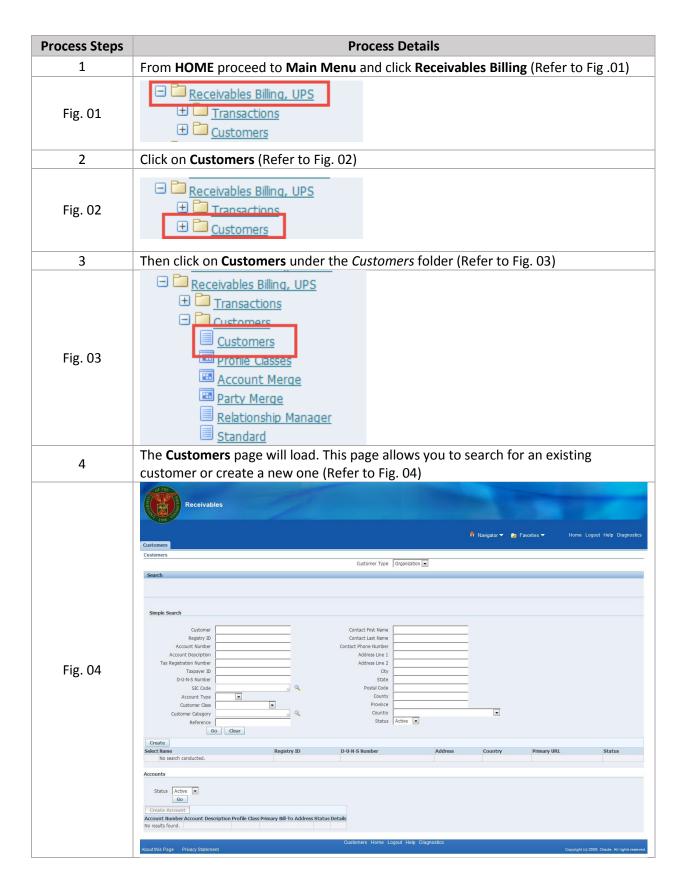
Financial Management Information System

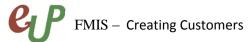


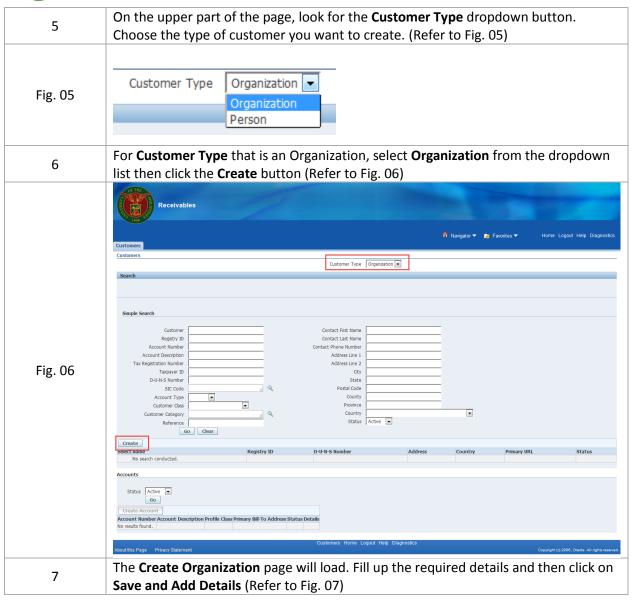
User Guide

Process ID	
Process Name	Creating Customers
Information System	Financial Management Information System
Functional Domain	Accounts Receivables Module
Responsibility	Receivables Billing
Purpose	Creating a Customer to be Billed. The Customer may be an Organization or an Individual
Data Requirement	Information about the Individual or Organization
Dependencies	None
Scenario	An Organization or an Individual has to be registered as a customer which can be billed (e.g. Hospital Bills, Rentals, Loans)









	Receivables					
	1508		🙃 Navigator ▼ 🏽 💀 Favorites ▼	Home Logout Help Diagr		
	Customers >					
	Create Organization		Cancel	Save And Add Details A		
	Customer Information	Customer Type ORGANIZATION	_			
	* Organization Name Alas Name Pronuncation D-U-4-S Number URL Context Value Light Name Include Institut					
	Account Information					
	Account Description Profile Class DEFAULT	Context Value	Account Type External Reference	_		
	Account Site Address					
g. 07	Addr Geography	* County United States Q. Address Line 1 Address Line 3 Address Line 3 City County State Postal Code ess Description Code Override Context Value				
g. 07	Account Site Details					
	Operating Unit Category Tentrory Translation EDI Location Context Value		Reference			
	Business Purposes Context Value Purpose Location Bill To Location Primary Remove Bill To	Customers Home Logout Help Diagnostics	Cancel	Save And Add Details		
	About this Page Privacy Statement			Copyright (c) 2008, Oracle, All righ		
	Field Name	Description		narks		
	Organization Name	Name of the Organization	RequiredText Field			
	Country	Country of the	Required	Field		
		Organization	• Text Field			
	Address Line 1	Address of the	Required	Field		
		Organization	• Text Field			
	*Note: Other fields may be filled-up depending on the available information about the Organization					
8	For Customer Type that is a click the Create button (Ref	an Individual, select Person f fer to Fig. 08)	rom the dropdo	own list the		

Customers					
		n Navigator ▼ 🍇 Favorites ▼ Home Log			
Customers > Create Person					
Person Information	Customer Type PERSON	Cancel Save And Add			
✓ TIP Only a first or last name is required. Priefix Priss Name Modile Name Last Name Suffix Email					
Context Value					
Account Information					
Account Description Profile Class DEFAULT	Context Value	Account Type External 🖳			
Account Site Address					
	* Country United States Address Line 1 Address Line 2 Address Line 3 Address Line 3 Address Line 3 Address Line 4 City Country State Postal Code deress Descripton Tidentifying Address ty Code Override Context Value				
Account Site Details	Account Site Details				
Rusiness Purposes Context Value Purpose Location Bill To Location Primary Remove Bill To Add Another Row	Context Value	Cancel Save And Ad			
	Customers Home Logout Help Diagnostics	Copyright (c) 2			
About this Page Privacy Statement	Description	Remarks			
About this Page Privacy Statement Field Name	Description				
		Required FieldText Field			
Field Name		Text Field Required Field			
Field Name First Name, or Last Name	Name of the Person	Text Field			
Field Name First Name, or Last Name Country Address Line 1	Name of the Person Country of the Person	 Text Field Required Field Text Field Required Field Text Field 			



	Receivables				
	ரி Navigator 🔻 🔁 Favorites 🔻 Home Logout Help Diagnostics				
	Customers Update Account: 1224				
	Cancel Save Apply				
	Customer Information				
	Name <u>eUP Foundation</u> Customer Type ORGANIZATION Registry ID 55515				
	Account				
Fig. 09	Account Number 1224 Account Description Classification Account Type External Context Value				
	Sites Account Profile Profile Amounts Payment Details Communication Relationships Order Management Late Charges Attachments				
	Account Sites Status Active Purpose Show related contact sites Operating Unit State State Address Line 2 Country Go City				
	Create Site				
	Address Mailstop Country Purposes Operating Unit Site Number Status Details Remove				
	Cancel Save Apply Customers Home Logout Help Diagnostics				
	About this Page Privacy Statement Cosymight (a 2000, Owder All rights reserved				
10	A <i>Confirmation</i> will appear indicating that the additional information about the customer have been saved. Click on Apply (Refer to Fig. 10)				
	Customers				
Fig. 10	© Confirmation Your changes have been saved Update Account: 1224				
	Cancel Save Apply				
11	Another Confirmation will appear indicating that the registration of the customer is				
	done. You are now redirected to the Customers page (Refer to Fig. 11)				
Fig. 11	Receivables				
	n Navigator ▼ to Favorites ▼ Home Logout Help Diagnostics Customers				
	Cantimation Your changes have been saved				
	Customers				
1.6					
1.18. 22	Customer Type Organization Search				
1.6.11	Customer Type Organization -				
1,6,11	Customer Type Organization -				
1,6,22	Customer Type Organization -				