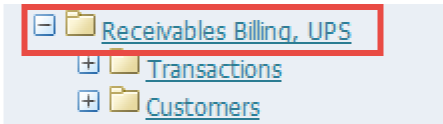
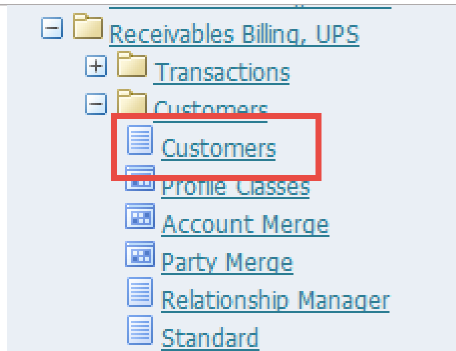
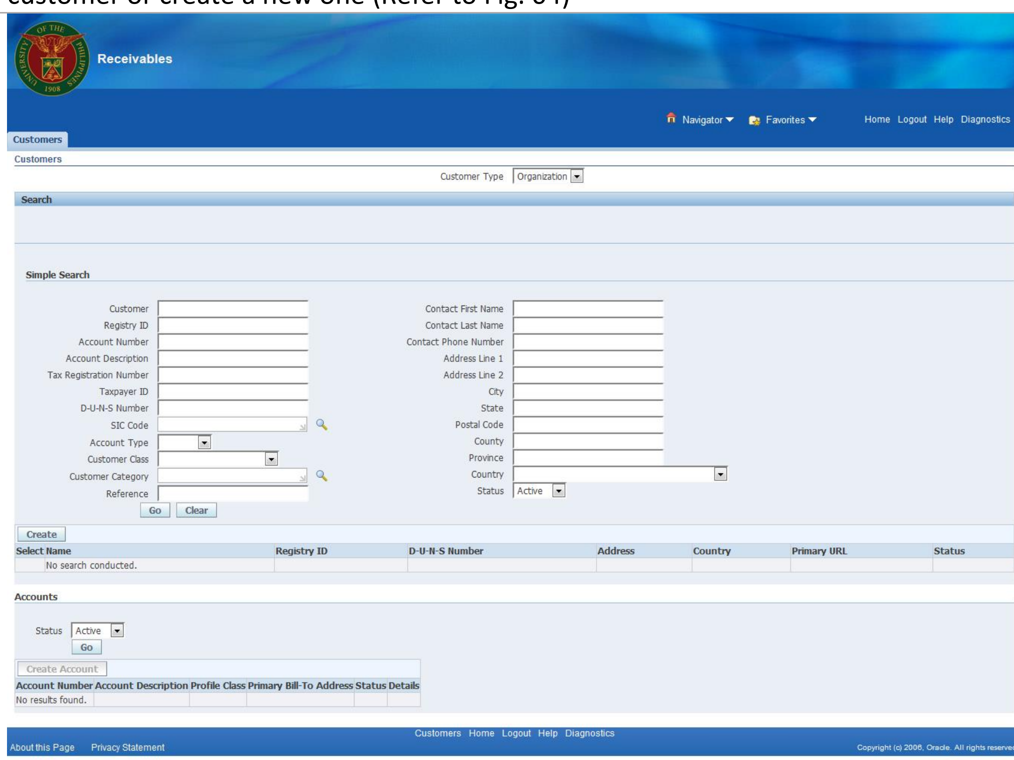
University of the Philippines

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)

<table>
<tr><th>Process Steps</th><th>Process Details</th></tr>
<tr><td>1</td><td>From HOME proceed to Main Menu and click Receivables Billing (Refer to Fig .01)</td></tr>
<tr><td>Fig. 01</td><td>
</td></tr>
<tr><td>2</td><td>Click on Customers (Refer to Fig. 02)</td></tr>
<tr><td>Fig. 02</td><td>
</td></tr>
<tr><td>3</td><td>Then click on Customers under the Customers folder (Refer to Fig. 03)</td></tr>
<tr><td>Fig. 03</td><td>
</td></tr>
<tr><td>4</td><td>The Customers page will load. This page allows you to search for an existing customer or create a new one (Refer to Fig. 04)</td></tr>
<tr><td>Fig. 04</td><td>
</td></tr>
</table>

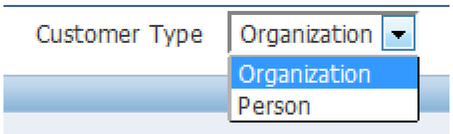
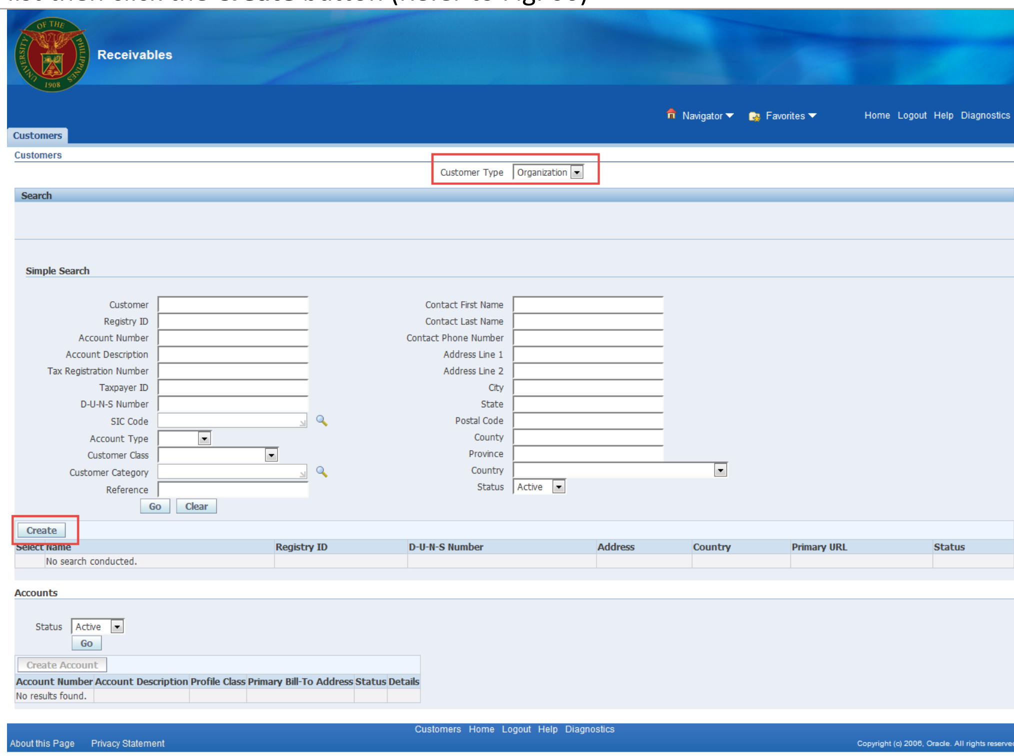
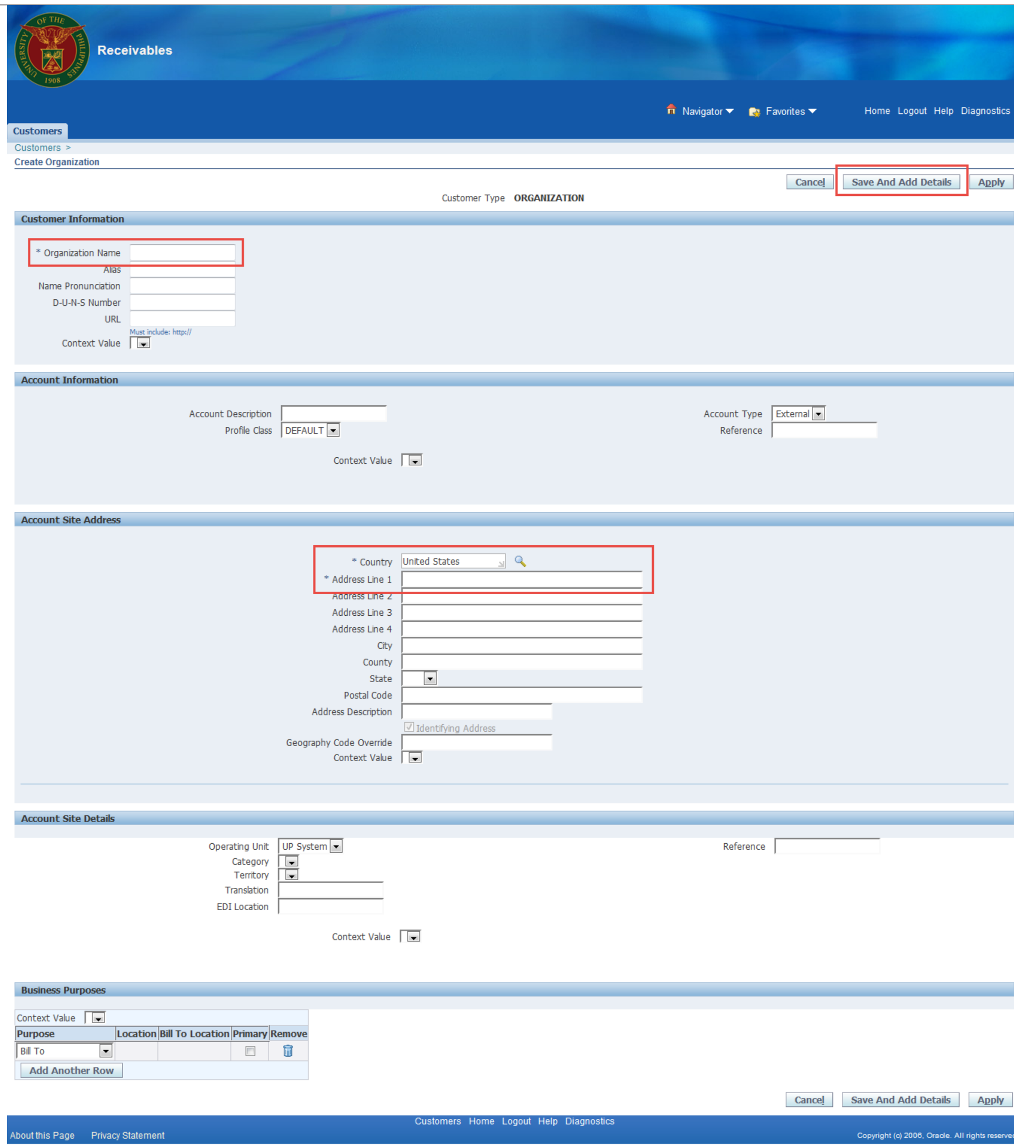
5	On the upper part of the page, look for the **Customer Type** dropdown button. Choose the type of customer you want to create. (Refer to Fig. 05)
Fig. 05	
6	For **Customer Type** that is an Organization, select **Organization** from the dropdown list then click the **Create** button (Refer to Fig. 06)
Fig. 06	
7	The **Create Organization** page will load. Fill up the required details and then click on **Save and Add Details** (Refer to Fig. 07)

Fig. 07



Field Name	Description	Remarks
Organization Name	Name of the Organization	• Required Field • Text Field
Country	Country of the Organization	• Required Field • Text Field
Address Line 1	Address of the Organization	• Required Field • Text Field

**Note:* *Other fields may be filled-up depending on the available information about the Organization*

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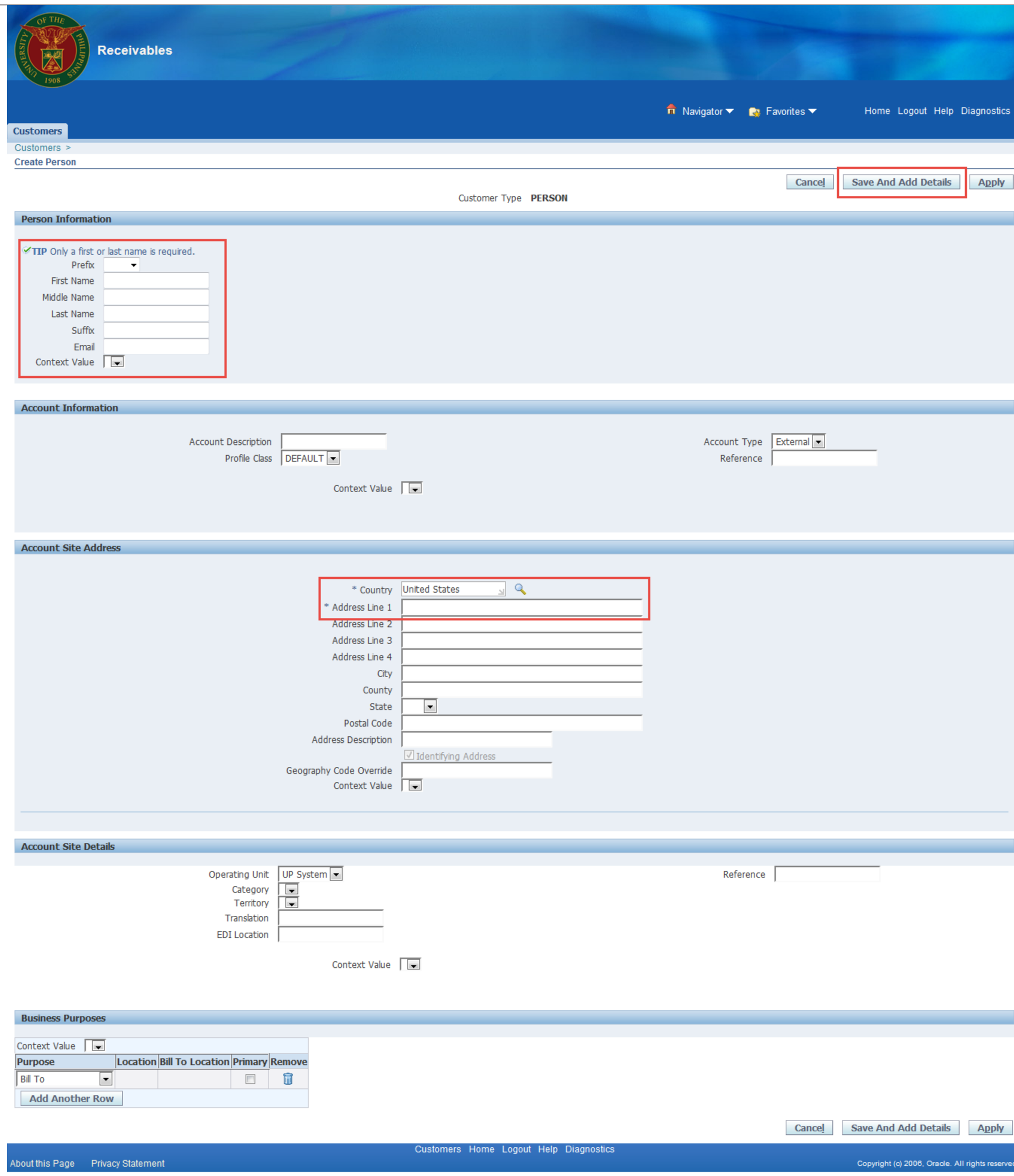
For **Customer Type** that is an Individual, select **Person** from the dropdown list then click the **Create** button (Refer to Fig. 08)

Fig. 08



Field Name	Description	Remarks
First Name, or Last Name	Name of the Person	• Required Field • Text Field
Country	Country of the Person	• Required Field • Text Field
Address Line 1	Address of the Person	• Required Field • Text Field

**Note:* *Other fields may be filled-up depending on the available information about the Organization*

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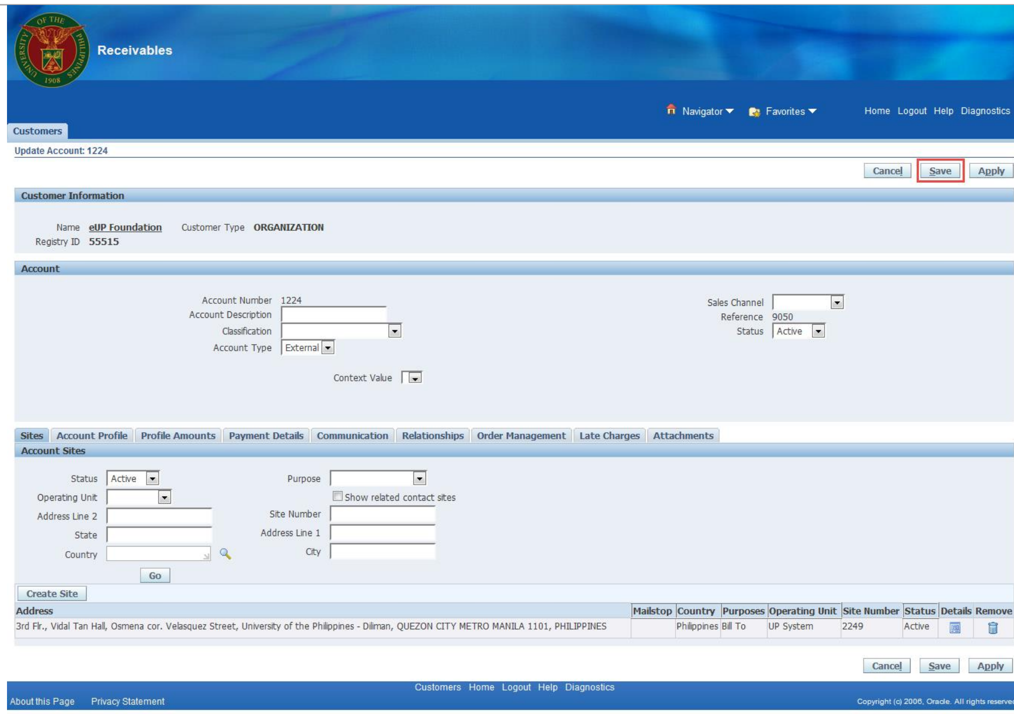
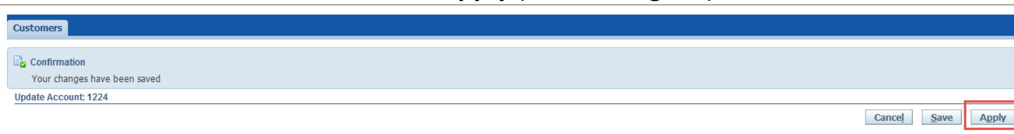
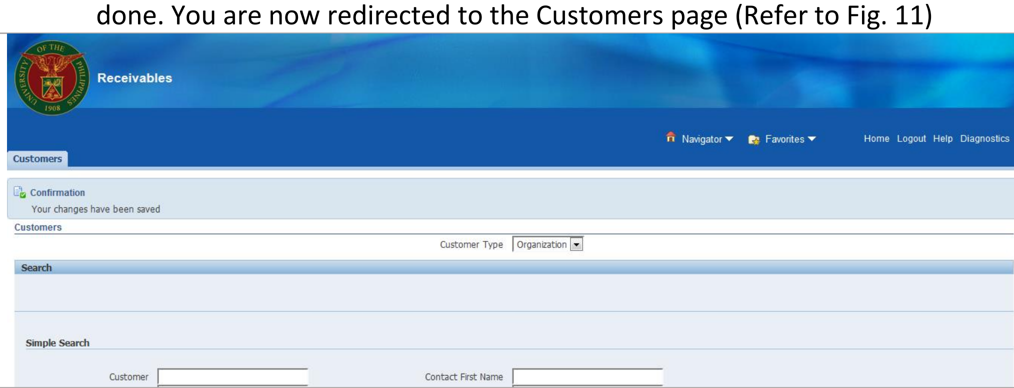
After clicking the **Save and Add Details** button, the customer is now created. Add other information that is available, then click on **Save** (Refer to Fig. 09)

<table>
<tr><td>Fig. 09</td><td>
</td></tr>
<tr><td>10</td><td>A Confirmation will appear indicating that the additional information about the customer have been saved. Click on Apply (Refer to Fig. 10)</td></tr>
<tr><td>Fig. 10</td><td>
</td></tr>
<tr><td>11</td><td>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)</td></tr>
<tr><td>Fig. 11</td><td>
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