ADD / UPDATE CUSTOMERS

These procedures are not meant to override any current Agency or Departmental policies (i.e.: record retention, etc.).

Steps

To request a customer add or update in Cardinal:

1. Complete the Add Update Customer form.

The Accounts Receivables section in the fiscal division or the district office receives the add/update customer form.

2. Verify the form is accurate and complete.
3. Enter the customer information into Cardinal.
4. Enter a credit analyst and collections specialist on the general information page 2.
5. Save the customer.

Features

Customers is a separate module. The Project Accounting, Billing, and Accounts Receivable modules use information entered in the Customers module.

There are four Customer Types in Cardinal: Individual, Business, Government (Federal, City, County, or Town), and State Agency. You can mark each customer as one of these types. When you enter a customer in Cardinal, it will automatically default to Customer Type: Individual.

VDOT uses information from Customers to bill Individuals and Businesses for damage to state property (guard rails, signs, equipment, etc.) and to bill Federal and State Agencies for construction.

Access to pages that contain sensitive Customer Information is limited to a few users.

A Customer ID can have multiple Contact IDs attached to it.

Customers that are not associated with Project Accounting will do have contracts attached to their record.

Process

Customers are updated and available in Cardinal as soon as the customer is saved.

Approvals

Access to add and update customers is restricted to specific fiscal staff.

Reporting Tools

Customer by Unit

Contacts by Unit

Note: See the Reports Job Aid for a complete listing of Reports.

References

Cardinal Job Aids: http://www.cardinalproject.vi.virginia.gov/job_aids.shtml
Fiscal Division Policies: http://insidevdot/sites/bs/default.aspx