

Creating and Maintaining Customers Overview

Creating a customer is the first step in the Billing Module of the Accounts Receivable functional area. Information entered for a customer is used in the Billing Module, the Accounts Receivable module, and the Project Accounting functional area. Before creating a new customer, you must check to see if the customer is already established in Cardinal.

Cardinal stores all the information needed for a customer. Customer profiles allow you to manage customer information. The data stored in customer information can contain names, addresses, contact information, payment terms, and other billing information.

Customer information is used to bill individuals and businesses for damage to state property (i.e., guard rails, signs, equipment, etc.) and Federal and State Agencies.

From time to time, you may need to update customer information. In Cardinal, you can update the customer's Type and other general information using the same General Information page you use to initially enter the customer.

Navigation Note: Please note that you may see a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.





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Verify the Customer Does Not Already Exist

This step is required before creating a customer to prevent duplication.

Step	Action
1.	<p>Navigate to the General Information page using the following path: Main Menu > Customers > Customer Information > General Information</p> <p>The General Information page displays with the Find an Existing Value tab displayed by default.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>General Information</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> Find an Existing Value Add a New Value </div> <div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 10px;"> <p>▼ Search Criteria</p> </div> <div style="margin-bottom: 10px;"> <p>*SetID = 50100 </p> <p>Customer ID begins with </p> <p>Name 1 begins with </p> <p>Name 2 begins with </p> <p>Telephone begins with </p> <p>City begins with </p> <p>State begins with </p> <p>Postal Code begins with </p> <p><input type="checkbox"/> Include History <input type="checkbox"/> Case Sensitive</p> <p>Limit the number of results to (up to 300): 300</p> <div style="display: flex; justify-content: space-between; align-items: center;"> Search Clear Basic Search Save Search Criteria </div> </div> </div>
2.	<p>The SetID field defaults to your Agency's Business Unit. If not, select the applicable Business Unit using the SetID Look Up icon.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>*SetID = 50100 </p> </div>
3.	<p>Enter the Customer name in the Name 1 field.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Name 1 begins with </p> </div>

Step	Action
	<p>If you are unsure of the Customer name, you can change the search criteria to Contains and search for part of the name. You can also add search criteria using a combination of additional fields such as Telephone, City, State, and/or Postal Code.</p>
4.	<p>Click the Search button.</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> Search Clear Basic Search  Save Search Criteria </div>
	<p>If the customer's name that was entered does not match an existing customer, the message "No matching values were found" displays.</p> <div style="border: 1px solid #ccc; padding: 10px; width: fit-content;"> <p>Limit the number of results to (up to 300): <input style="width: 50px;" type="text" value="300"/></p> <div style="margin-top: 10px;"> Search Clear Basic Search  Save Search Criteria </div> <div style="margin-top: 20px; border: 2px solid red; padding: 2px 10px; display: inline-block;"> No matching values were found. </div> </div> <p>If the customer exists, a customer does not need to be created since they are already in the system.</p>
5.	<p>If the customer does not exist, proceed to the next section of this Job Aid titled Entering a New Customer.</p>

Entering a New Customer

Step	Action
1.	<p>Navigate to the General Information page using the following path: Main Menu > Customers > Customer Information > General Information</p> <p>The General Information page displays the Find an Existing Value tab by default.</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p>General Information</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> Find an Existing Value Add a New Value </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> <p>▼ Search Criteria</p> <p>*SetID = <input type="text" value="50100"/> </p> <p>Customer ID <input type="text" value="begins with"/> </p> <p>Name 1 <input type="text" value="begins with"/></p> <p>Name 2 <input type="text" value="begins with"/></p> <p>Telephone <input type="text" value="begins with"/></p> <p>City <input type="text" value="begins with"/></p> <p>State <input type="text" value="begins with"/></p> <p>Postal Code <input type="text" value="begins with"/></p> <p><input type="checkbox"/> Include History <input type="checkbox"/> Case Sensitive</p> <p>Limit the number of results to (up to 300): <input type="text" value="300"/></p> <div style="display: flex; justify-content: space-between; align-items: center;"> Search Clear Basic Search Save Search Criteria </div> </div> </div>
2.	<p>Click the Add a New Value tab.</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <div style="border: 1px solid gray; padding: 5px;"> Find an Existing Value Add a New Value </div> </div>

Step	Action
	<p>The Add a New Value tab displays.</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="margin: 0;">General Information</p> <div style="display: flex; justify-content: space-around; margin-bottom: 10px;"> Find an Existing Value Add a New Value </div> <p style="margin: 0;">*SetID <input style="width: 80px;" type="text" value="50100"/> </p> <p style="margin: 0;">*Customer ID <input style="width: 150px;" type="text" value="NEXT"/> </p> <p style="text-align: center; margin-top: 10px;">Add</p> </div>
3.	<p>The SetID field defaults based on your Business Unit. If this is not correct, select the applicable SetID using the SetID Look Up icon.</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px auto; width: fit-content;"> <p>*SetID 50100 </p> </div>
4.	<p>The Customer ID field defaults to NEXT. Do not change.</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px auto; width: fit-content;"> <p>*Customer ID NEXT </p> </div>
	<p>When the required customer information has been entered and saved, Cardinal updates NEXT to the next available, sequential Customer ID number.</p>
5.	<p>Click the Add button.</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px auto; width: fit-content;"> <p style="text-align: center;">Add</p> </div>



Accounts Receivable Job Aid

AR323_Creating and Maintaining Customers

Step	Action
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The **General Info** tab displays.

General Info
Bill To Options
Ship To Options
Sold To Options
Miscellaneous General Info

SetID 50100
Customer ID NEXT
General Info Links ...More

*Status Active
Copy From Customer
Level Regular

*Date Added 05/29/2024
*Since 05/29/2024
*Type Individual

*Name 1
Alt Name 1
*Short Name

Name 2
Alt Name 2

Email ID

Currency Code
Rate Type

Roles




<input type="checkbox"/> Bill To Customer Bill To Selection	<input type="checkbox"/> Correspondence Customer Correspondence Selection
<input type="checkbox"/> Ship To Customer Ship To Selection	<input type="checkbox"/> Remit From Customer Remit From Selection
<input type="checkbox"/> Sold To Customer Sold To Selection	<input checked="" type="checkbox"/> Corporate Customer Corporate Selection
<input type="checkbox"/> Broker Customer	<input type="checkbox"/> Consolidation Customer
<input type="checkbox"/> Indirect Customer	Consolidation Business Unit <input style="width: 50px;" type="text"/>

Federal Attributes

 Federal Customer
 Trading Partner Code
Disbursing Office

 Appropriation Symbol Not Required for Reimbursable Agreements

6.	<p>The Status field defaults to Active and should not be changed.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> *Status Active </div>
7.	<p>The Date Added and Since fields default to the current date. Use the Date Added and Since Calendar Icons to change to the applicable date as needed.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> *Date Added 05/29/2024 *Since 05/29/2024 </div>
8.	<p>The Level field defaults to Regular and should not be changed.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> Level Regular </div>
9.	<p>Select the applicable Customer Type using the Type dropdown menu (“Business”, “Government”, “Individual”, or “State Agency”).</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> *Type </div>

Step	Action
10.	<p>Enter the name of the customer in the Name 1 field. The Short Name field populates using the first 10 characters of the Name 1 field.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> *Name 1 <input style="border: 1px solid red;" type="text"/> Alt Name 1 *Short Name <input style="border: 1px solid red;" type="text"/> </div>
	<p>The Name 2 field can be used for additional information as needed.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Name 2 <input style="border: 1px solid red;" type="text"/> Alt Name 2 </div>
11.	<p>Click the Currency Code Look Up icon and select “USD”.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Currency Code <input style="border: 1px solid red;" type="text"/>  </div>
12.	<p>Click the Rate Type Look Up icon and select the rate type of “CRRNT”.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Rate Type <input style="border: 1px solid red;" type="text"/>  </div>
13.	<p>In the Roles section, select the applicable checkbox options (Bill to Customer, Ship to Customer, and Sold to Customer).</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Roles</p> <ul style="list-style-type: none"> <input type="checkbox"/> Bill To Customer Bill To Selection <input type="checkbox"/> Ship To Customer Ship To Selection <input type="checkbox"/> Sold To Customer Sold To Selection <input type="checkbox"/> Broker Customer <input type="checkbox"/> Indirect Customer </div>

Step	Action
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Screenshot of the bottom section of the **General Info** tab:

Federal Attributes

Federal Customer Trading Partner Code Disbursing Office

Appropriation Symbol Not Required for Reimbursable Agreements

Contracts Options

Hold Billing on Unpaid Cost

Support Teams Personalize | Find | View All | First 1 of 1 Last

Team Code	Default	Description		
<input type="text"/>	<input type="checkbox"/>		+	-

Address Locations Find | View All First 1 of 1 Last

*Location Bill To Primary Broker Primary

Description Ship To Primary Indirect Primary

Sold To Primary Correspondence Address

RFID Enabled VAT Default VAT Service Treatment Setup

Address Details Find | View All First 1 of 1 Last

*Effective Date *Status

Tax Code Language Code

Physical Nature

Where Performed

Alternate Name 1 Alternate Name 2

Country

Address 1

Address 2 [View Phone Information](#)

eVA VLIN

eVA Address ID

City In City Limit Postal

County

State


14.




Select the **Federal Customer** checkbox option if “Government” was selected as the Customer Type. A trading partner code is required if the **Federal Customer** checkbox option is selected.

Federal Attributes

Federal Customer Trading Partner Code

Appropriation Symbol Not Required for Reimbursable Agreements

Step	Action						
	<p>The Hold Billing on Unpaid Cost checkbox option defaults from the Contracts – Installation Options page. The checkbox is grayed out on this page and cannot be updated. The value indicated here will default on the new contract that is created from the Project Accounting Module.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p style="text-align: center; color: #a52a2a; font-weight: bold;">Contracts Options</p> <p><input type="checkbox"/> Hold Billing on Unpaid Cost</p> </div>						
15.	<p>Click the Team Code Look Up icon and select the applicable team code that corresponds to the Customer Type and then select the Default checkbox option.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p style="text-align: center; color: #a52a2a; font-weight: bold;">Support Teams</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 40%;">Team Code</th> <th style="width: 15%;">Default</th> <th style="width: 45%;">Description</th> </tr> </thead> <tbody> <tr> <td style="border: 2px solid red;"> <input type="text"/> </td> <td style="text-align: center; border: 2px solid red;"><input type="checkbox"/></td> <td></td> </tr> </tbody> </table> </div>	Team Code	Default	Description	<input type="text"/>	<input type="checkbox"/>	
Team Code	Default	Description					
<input type="text"/>	<input type="checkbox"/>						
16.	<p>Select the applicable address location checkbox options (Bill To, Ship To, and Sold To). Select the Primary checkbox option for each one selected.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p style="text-align: center; color: #a52a2a; font-weight: bold;">Address Locations</p> <p>*Location <input type="text" value="1"/> <input type="checkbox"/> Bill To <input type="checkbox"/> Primary</p> <p>Description <input type="text"/></p> <p style="margin-left: 100px;"><input type="checkbox"/> Ship To</p> <p style="margin-left: 100px;"><input type="checkbox"/> Sold To</p> <p style="margin-left: 100px;"><input type="checkbox"/> Primary</p> <p style="margin-left: 100px;"><input type="checkbox"/> Primary</p> </div>						
17.	<p>Enter the customer address information in the Address Details section.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p style="text-align: center; color: #a52a2a; font-weight: bold;">Address Details</p> <p style="text-align: right; font-size: small;">Find View All First 1 of 1 Last</p> <p>*Effective Date <input type="text" value="05/29/2024"/> *Status <input type="text" value="Active"/></p> <p>Tax Code <input type="text"/> Language Code <input type="text" value="English"/></p> <p>Physical Nature <input type="text"/></p> <p>Where Performed <input type="text"/></p> <p>Alternate Name 1 <input type="text"/> Alternate Name 2 <input type="text"/></p> <hr/> <div style="border: 2px solid red; padding: 5px;"> <p>Country <input type="text" value="USA"/> United States</p> <p>Address 1 <input type="text"/></p> <p>Address 2 <input type="text"/></p> <p>eVA VLIN <input type="text"/></p> <p>eVA Address ID <input type="text"/></p> <p>City <input type="text"/> <input type="checkbox"/> In City Limit</p> <p>County <input type="text"/> Postal <input type="text"/></p> <p>State <input type="text"/> </p> </div> <p style="text-align: right; font-size: small; margin-top: 10px;">View Phone Information</p> </div>						

Step	Action
18.	<p>Click the Bill To Options link at the bottom of the page or scroll to the top of the page and click the Bill To Options tab.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: center;">  Save  Notify  Refresh </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> General Info Bill To Options Ship To Options Sold To Options Miscellaneous General Info </div> </div>

The **Bill To Options** tab displays (top portion of the page).

General Info
Bill To Options
Ship To Options
Sgld To Options
Miscellaneous General Info


SetID 50100
Customer ID NEXT
Ann D LLC


Customer Bill To Options Find | View All


*Effective Date *Status Active


Currency Code USD Rate Type CRRNT


Responsibilities


Credit Analyst 

AR Specialist 

Billing Specialist 

Collector 

Bill Inquiry Phone 

Billing Authority 

Billing Options


Direct Invoicing


Federal Highway File


Prompt for Billing Currency


Electronic Invoice


*Freight Bill Type Shipping

Bill Type 

Billing Cycle Identifier 

Invoice Form 


Bill By Identifier 


AR Distribution Code 

Hold Number of Days

Billing Consolidation Data


Consolidation Key


SetID 

Customer ID 

Blanket Purchase Orders

Blanket PO Number


Start Date 


End Date 

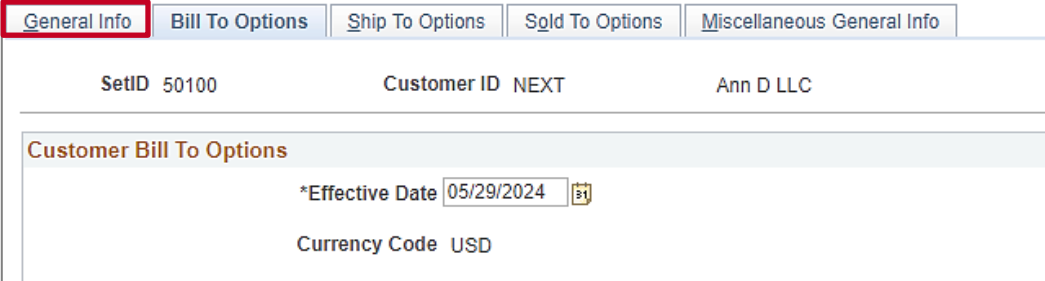
Order Management Options

Purchase Order Required

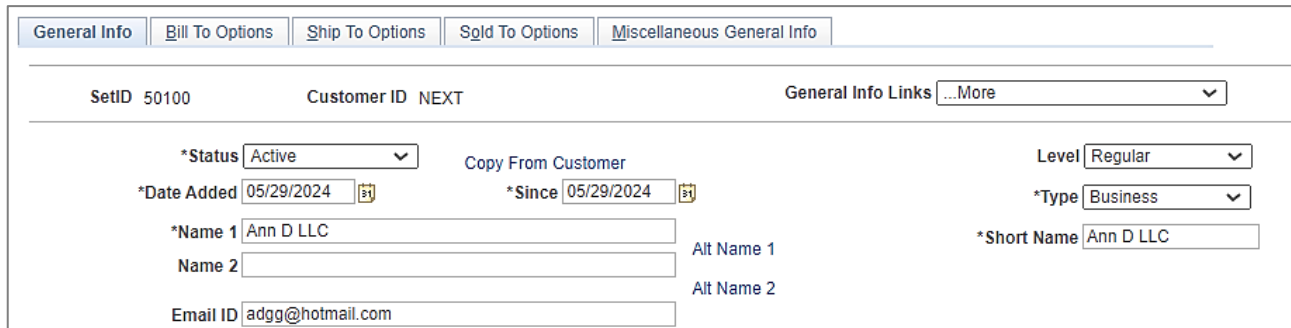
Disable Prices on Receipt

19.	<p>Click the Credit Analyst Look Up icon and select the applicable Credit Analyst.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Credit Analyst <input style="border: 2px solid red;" type="text"/> </p> </div>
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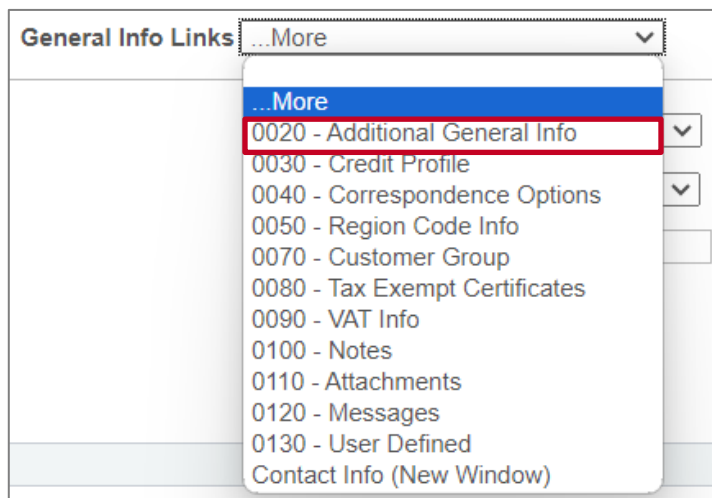
20.	<p>Click the Collector Look Up icon and select the applicable Collector (typically, the person entering the customer information is the Collector).</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Collector <input style="border: 2px solid red;" type="text"/> </p> </div>
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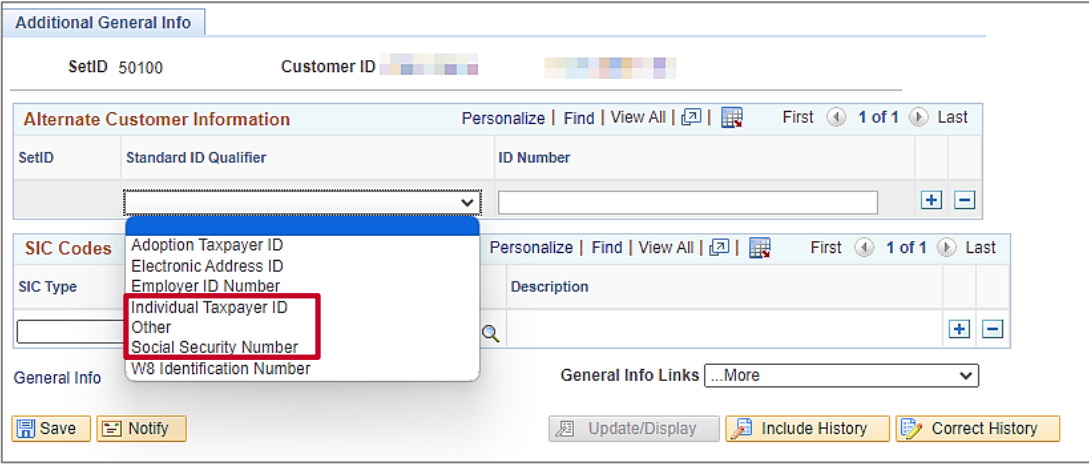
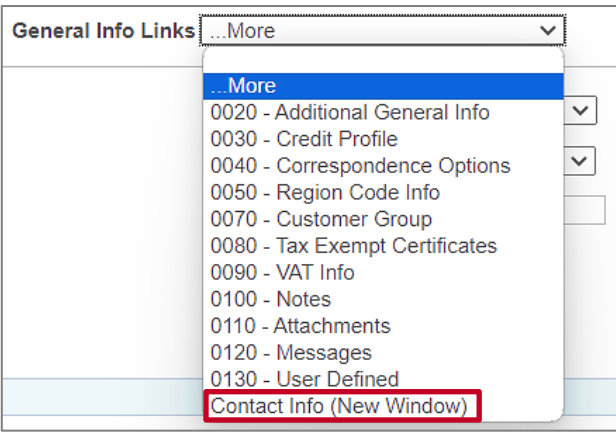
Step	Action
21.	<p>Click the General Info tab.</p> 

The **General Info** tab displays (top portion of the page).



22. Click the **General Info Links** dropdown menu (i.e., **...More**). The **General Info Links** dropdown contains additional customer data options.



Step	Action
	<p>Only a few users (Collection Specialists and Post Production Support (PPS) users) will have access to the Additional General Info page from the General Info Links dropdown menu.</p> <p>The Additional General Info page contains sensitive data like Social Security Number, Individual Tax ID, etc. The Standard ID Qualifier field is used to enter a Standard ID type.</p> <div data-bbox="305 493 1388 955" style="border: 1px solid #ccc; padding: 5px;">  </div>
23.	<p>Select Contract Info (New Window) from the General Info Links dropdown menu to enter customer contact information.</p> <div data-bbox="305 1071 917 1501" style="border: 1px solid #ccc; padding: 5px;">  </div>

Step	Action
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The **Contact Info** page displays in a new window.

Contact Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ **Search Criteria**

*SetID =

Contact ID begins with

Contact Name begins with

Customer SetID begins with

Customer ID begins with

Customer Name begins with

Include History
 Case Sensitive

Limit the number of results to (up to 300):

24. Click the **Add a New Value** tab.

The **Contact Info** page displays.

Contact Info

*SetID

*Contact ID

Step	Action
25.	The SetID defaults based on your Business Unit. If it does not, use the SetID Look Up icon to select the applicable SetID. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <input type="text" value="*SetID 50100"/> </div>
26.	The Contact ID field should display "NEXT". Do not change. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <input type="text" value="*Contact ID NEXT"/> </div>
27.	Click the Add button. <div style="border: 1px solid black; padding: 5px; margin-top: 10px; text-align: center;"> <input type="button" value="Add"/> </div>

The **Maintain Contacts** page displays.

Contact Information

Maintain Contacts

SetID 50100 Contact ID NEXT

Find | View All First 1 of 1 Last

Contact Information

*Effective Date

*Status

*Name

*Contact Flag

Title

Email Address

Salutation Code

Salutation






*Preferred Communication

Language Code

Person ID

Contact Customers Contact Phone and Type

User Profile

Step	Action
	<p>In the Contact Information section some contact information is required.</p> <p>Required fields are:</p> <ul style="list-style-type: none"> - Effective Date (defaults to the current date) - Name - Status (defaults to Active) - Contact Flag (defaults to External Contact) <p>Optional fields are:</p> <ul style="list-style-type: none"> - Title, Email ID - Salutation Code - Salutation - Preferred Communication - Language Code
28.	<p>The Effective Date defaults to the current date. Update, if applicable, using the Effective Date Calendar icon.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>*Effective Date <input style="border: 1px solid red;" type="text" value="05/29/2024"/> </p> </div>
29.	<p>Enter the name of the contact in Name field.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>*Name <input style="border: 1px solid red;" type="text"/></p> </div>
30.	<p>The Preferred Communication field defaults to “Call”. Select the applicable option using the Preferred Communication dropdown button as needed.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>*Preferred Communication <input style="border: 1px solid red;" type="text" value="Call"/> </p> </div>
31.	<p>The Status field should default to “Active”. If it does not, select the “Active” option using the Status dropdown button.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>*Status <input style="border: 1px solid red;" type="text" value="Active"/> </p> </div>
32.	<p>The Contact Flag field should default to “External Contact”. If it does not, use the Contact Flag dropdown button to select “External Contact”.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>*Contact Flag <input style="border: 1px solid red;" type="text" value="External Contact"/> </p> </div>
33.	<p>Click the Contact Phone and Type link at the bottom of the page.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Contact Phone and Type</p> </div>

Step	Action
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The **Contact Phone and Type** page displays.

If "Call" or "Fax" was selected as the Preferred Communication, this page is required.

Contact Information

Contact Phone and Type

SetID 50100 Contact ID NEXT

Contact Information Find | View All First 1 of 1 Last

Effective Date 05/29/2024 Name Ann DeNeen

Contact Phone Information					Personalize Find View All [Print] [Grid]	First 1 of 1 Last
*Phone Type	International Prefix	Phone Number	Extension	Primary Phone		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		+ -

Contact Type Information Personalize | Find | View All | [Print] [Grid] First 1 of 1 Last

Contact Type	Description		
<input type="text"/>			+ -

Contact Information Contact Customers

User Profile

34.	<p>Select the phone type using the Phone Type Look Up icon. Enter the Phone Number, including any Extension information, in the corresponding fields. If multiple phone numbers are entered, be sure to use the Primary Phone checkbox option to identify one as preferred.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Phone Type</th> <th>International Prefix</th> <th>Phone Number</th> <th>Extension</th> <th>Primary Phone</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="checkbox"/></td> <td></td> <td style="text-align: right;">+ -</td> </tr> </tbody> </table> </div>	*Phone Type	International Prefix	Phone Number	Extension	Primary Phone			<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		+ -
*Phone Type	International Prefix	Phone Number	Extension	Primary Phone											
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		+ -									
35.	<p>Click the Contact Customers link at the bottom of the page to link this contact to the new customer.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Contact Information Contact Customers</p> <p>User Profile</p> </div>														

Step	Action
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The **Contact Customers** page displays.

Contact Information

Contact Customers

Contact SetID 50100 Contact ID NEXT

Contact Information Find | View All First 1 of 1 Last

Effective Date 05/29/2024 Name Ann DeNeen

Link Contact to Customer Personalize | Find | 1 of 1 Last

Customer	Self Service Security	*Customer SetID	*Customer ID	Customer Name	Location	Credit Cards	Documentation	Primary Bill To	Primary Ship To	Primary Sold To
		50100				Credit Cards	Documentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Contact Information

Contact Phone and Type User Profile

36. Select the Customer ID using the **Customer ID Look Up** icon. Once the Customer ID is selected, the **Customer Name** field populates.

***Customer ID**



If more than one customer shares the same contact, another Customer can be added by clicking the **Add a New Row (+)** icon to add another row.

Primary Bill To	Primary Ship To	Primary Sold To	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input style="width: 20px; height: 20px;" type="button" value="+"/> <input style="width: 20px; height: 20px;" type="button" value="-"/>


37. Select the location using the **Location Look Up** icon.

Location



The **Location** field is populated along with the **Primary Bill To**, **Primary Ship To**, and **Primary Sold To** checkbox options.

Location	Credit Cards	Documentation	Primary Bill To	Primary Ship To	Primary Sold To
<input style="width: 100%; height: 20px;" type="text" value="1"/> FINGERPRINTING	Credit Cards	Documentation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Step	Action
38.	<p>When the Contact Customers information is complete, click the Save button.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Contact Information</p> <p>Contact Phone and Type User Profile</p> <p>Save Notify</p> </div>
	<p>Once you save the information, Cardinal updates the Contact ID in the Header section with the next available sequential number.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Contact SetID 50100 Contact ID 259</p> </div>

Setting Up Customer Correspondence Options

The Correspondence Options allows you to select the information used on Invoices and other communications with customers.

Step	Action
1.	<p>Navigate to the General Information page using the following path: Main Menu > Customers > Customer Information > General Information</p> <p>The General Information page displays with the Find an Existing Value tab displayed by default.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>General Information</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> Find an Existing Value Add a New Value </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>▼ Search Criteria</p> </div> <div style="margin-bottom: 10px;"> <p>*SetID = </p> <p>Customer ID begins with </p> <p>Name 1 begins with </p> <p>Name 2 begins with </p> <p>Telephone begins with </p> <p>City begins with </p> <p>State begins with </p> <p>Postal Code begins with </p> <p><input type="checkbox"/> Include History <input type="checkbox"/> Case Sensitive</p> <p>Limit the number of results to (up to 300): 300</p> <div style="display: flex; justify-content: space-between; align-items: center;"> Search Clear Basic Search Save Search Criteria </div> </div> </div>
2.	<p>The SetID defaults based on your Business Unit. If it does not, select the applicable SetID using the SetID Look Up icon.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>*SetID = </p> </div>
3.	<p>Enter or select the Customer's ID using the Customer ID Look Up icon.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Customer ID begins with </p> </div>

Step	Action
4.	Click the Search button. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px; display: flex; align-items: center; gap: 10px;"> <div style="border: 2px solid red; padding: 2px 10px; background-color: #fff;">Search</div> <div style="border: 1px solid #ccc; padding: 2px 10px; background-color: #fff;">Clear</div> Basic Search Save Search Criteria </div>

The **General Info** tab displays.

General Info
Bill To Options
Ship To Options
Sold To Options
Miscellaneous General Info

SetID 50100
Customer ID 0000167446
General Info Links ...More

*Status Active

*Date Added 05/29/2024 BY *Since 05/29/2024 BY

*Name 1 Ann D LLC Alt Name 1

Name 2 Alt Name 2

Email ID addg@zhotmail.com

Currency Code USD Q Rate Type CRRNT Q

Level Regular

*Type Business

*Short Name Ann D LLC

Roles

<input checked="" type="checkbox"/> Bill To Customer Bill To Selection	<input checked="" type="checkbox"/> Correspondence Customer Correspondence Selection	
<input checked="" type="checkbox"/> Ship To Customer Ship To Selection	<input type="checkbox"/> Remit From Customer Remit From Selection	50100 Q 0000000004 Q
<input checked="" type="checkbox"/> Sold To Customer Sold To Selection	<input type="checkbox"/> Corporate Customer Corporate Selection	50100 Q 0000000007 Q
<input type="checkbox"/> Broker Customer	<input type="checkbox"/> Consolidation Customer	Consolidation Business Unit
<input type="checkbox"/> Indirect Customer		

Federal Attributes

Federal Customer Trading Partner Code Disbursing Office

Appropriation Symbol Not Required for Reimbursable Agreements

Contracts Options

Hold Billing on Unpaid Cost

5. Select "Correspondence Options" from the **General Info Links** dropdown menu.

General Info
Bill To Options
Ship To Options
Sold To Options
Miscellaneous General Info

SetID 50100
Customer ID 0000167446
General Info Links ...More

*Status Active

*Date Added 05/29/2024 BY *Since 05/29/2024 BY

*Name 1 Ann D LLC Alt Name 1

Name 2 Alt Name 2

Email ID addg@zhotmail.com

Currency Code USD Q Rate Type CRRNT Q

Level Regular

*Type Business


*Short Name Ann D LLC

Roles

<input checked="" type="checkbox"/> Bill To Customer Bill To Selection	<input checked="" type="checkbox"/> Correspondence Customer Correspondence Selection	
--	--	--

General Info Links ...More

- ... More
- 0020 - Additional General Info
- 0030 - Credit Profile
- 0040 - Correspondence Options
- 0050 - Region Code Info
- 0070 - Customer Group
- 0080 - Tax Exempt Certificates
- 0090 - VAT Info
- 0100 - Notes
- 0110 - Attachments
- 0120 - Messages
- 0130 - User Defined
- Contact Info (New Window)

Step	Action
	The General Info links dropdown menu on the General Info tab has links to Correspondence Options , Notes , and Attachments .

The **Correspondence Options** tab displays.

General Info
Bill To Options
Ship To Options
Sold To Options
Correspondence Options
Miscellaneous General Info

SetID 50100 Customer ID 0000167446 Ann D LLC

Customer Defaults

Primary Contact 1 Ann DeNeen LLC

Primary Address 1

Correspondence Options

Find | View All First ◀ 1 of 1 ▶ Last

*Effective Date *Status + -

Language Code

Contact

Suppress Contact

Primary Contact

Override

Address

Contact Address

Primary Address

Item Address

Override

Dunning

Dunning Group Dunning ID

Generate Dunning Image Hold Date

6. Click the **Add a New Row (+)** icon in the **Correspondence Options** section.

Correspondence Options
Find | View All First ◀ 1 of 1 ▶ Last

*Effective Date *Status + -

Language Code

Contact

Suppress Contact

Primary Contact

Override

Address

Contact Address

Primary Address


Item Address

Override

Dunning

Dunning Group Dunning ID

Generate Dunning Image Hold Date

Step	Action		
	<p>A new row is created in the Correspondence Options section.</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Correspondence Options Find View All First 1 of 2 Last</p> <p>*Effective Date <input type="text" value="05/30/2024"/> *Status <input type="text" value="Active"/> <input type="button" value="+"/> <input type="button" value="-"/></p> <p>Language Code <input type="text" value="ENG"/> <input type="button" value="🔍"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> <p>Contact</p> <p><input checked="" type="radio"/> Suppress Contact</p> <p><input type="radio"/> Primary Contact</p> <p><input type="radio"/> Override <input type="text"/></p> </td> <td style="width: 50%; padding: 5px;"> <p>Address</p> <p><input type="radio"/> Contact Address</p> <p><input checked="" type="radio"/> Primary Address</p> <p><input type="radio"/> Item Address</p> <p><input type="radio"/> Override <input type="text"/></p> </td> </tr> </table> <p>Dunning</p> <p>Dunning Group <input type="text" value="All Groups"/> Dunning ID <input type="text"/> <input type="button" value="🔍"/></p> <p>Generate Dunning Image <input type="text"/> <input type="checkbox"/> Hold Date <input type="text"/> <input type="button" value="📅"/></p> </div>	<p>Contact</p> <p><input checked="" type="radio"/> Suppress Contact</p> <p><input type="radio"/> Primary Contact</p> <p><input type="radio"/> Override <input type="text"/></p>	<p>Address</p> <p><input type="radio"/> Contact Address</p> <p><input checked="" type="radio"/> Primary Address</p> <p><input type="radio"/> Item Address</p> <p><input type="radio"/> Override <input type="text"/></p>
<p>Contact</p> <p><input checked="" type="radio"/> Suppress Contact</p> <p><input type="radio"/> Primary Contact</p> <p><input type="radio"/> Override <input type="text"/></p>	<p>Address</p> <p><input type="radio"/> Contact Address</p> <p><input checked="" type="radio"/> Primary Address</p> <p><input type="radio"/> Item Address</p> <p><input type="radio"/> Override <input type="text"/></p>		
7.	<p>Enter or select the Dunning ID using the Dunning ID Look Up icon.</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Dunning Group <input type="text" value="All Groups"/> <input type="button" value="🔍"/> Dunning ID <input type="text"/> <input type="button" value="🔍"/></p> <p>Generate Dunning Image <input type="text"/> <input type="checkbox"/> Hold Date <input type="text"/> <input type="button" value="📅"/></p> </div>		
	<p>“DOA” should be used for the dunning state Agencies. “STD” is used for individual customers. Federal customers are not typically set up to receive dunning notices.</p>		
8.	<p>Once your changes are entered, click the Save button.</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p><input type="button" value="Save"/> <input type="button" value="🔍 Return to Search"/> <input type="button" value="📄 Previous in List"/></p> </div>		

Adding Attachments

Attachments can be used to enter additional information about the customer.

Step	Action
1.	<p>Navigate to the General Information page using the following path: Main Menu > Customers > Customer Information > General Information</p> <p>The General Information page displays the Find an Existing Value tab.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>General Information</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p style="border: 1px solid #add8e6; padding: 2px;"> Find an Existing Value Add a New Value </p> <p style="background-color: #e6f2ff; padding: 2px;"> ▼ Search Criteria </p> <p>*SetID = </p> <p>Customer ID begins with ▼ </p> <p>Name 1 begins with ▼ </p> <p>Name 2 begins with ▼ </p> <p>Telephone begins with ▼ </p> <p>City begins with ▼ </p> <p>State begins with ▼ </p> <p>Postal Code begins with ▼ </p> <p><input type="checkbox"/> Include History <input type="checkbox"/> Case Sensitive</p> <p>Limit the number of results to (up to 300): 300</p> <p style="text-align: right;"> Search Clear Basic Search Save Search Criteria </p> </div>
2.	<p>The SetID should default based on your Business Unit. If it does not, select the applicable SetID using the SetID Look Up icon.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>*SetID = </p> </div>
3.	<p>Enter or select the Customer's ID using the Customer ID Look Up icon.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Customer ID begins with ▼ </p> </div>

Step	Action
4.	Click the Search button. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px; display: flex; align-items: center; gap: 10px;"> <div style="border: 2px solid red; padding: 2px 10px; background-color: #f96;">Search</div> <div style="border: 1px solid #ccc; padding: 2px 10px; background-color: #fff;">Clear</div> <div style="font-size: 0.9em;">Basic Search </div> <div style="font-size: 0.9em;">Save Search Criteria</div> </div>

The **General Info** tab displays.

General Info
Bill To Options
Ship To Options
Sold To Options
Miscellaneous General Info

SetID 50100 Customer ID 0000167446 General Info Links ...More

*Status Active

Level Regular

*Date Added 05/29/2024

*Since 05/29/2024

*Type Business

*Name 1 Ann D LLC

Alt Name 1

*Short Name Ann D LLC

Name 2

Alt Name 2

Email ID addg@zhotmail.com

Currency Code USD

Rate Type CRRNT

Roles

<input checked="" type="checkbox"/> Bill To Customer Bill To Selection	<input checked="" type="checkbox"/> Correspondence Customer Correspondence Selection	
<input checked="" type="checkbox"/> Ship To Customer Ship To Selection	<input type="checkbox"/> Remit From Customer Remit From Selection	50100 000000004
<input checked="" type="checkbox"/> Sold To Customer Sold To Selection	<input type="checkbox"/> Corporate Customer Corporate Selection	50100 000000007
<input type="checkbox"/> Broker Customer	<input type="checkbox"/> Consolidation Customer	Consolidation Business Unit
<input type="checkbox"/> Indirect Customer		

Federal Attributes

<input type="checkbox"/> Federal Customer	Trading Partner Code 	Disbursing Office
<input type="checkbox"/> Appropriation Symbol Not Required for Reimbursable Agreements		

Contracts Options

<input type="checkbox"/> Hold Billing on Unpaid Cost

5. Select "0110 – Attachments" from the **General Info Links** dropdown menu.

General Info
Bill To Options
Ship To Options
Sold To Options
Miscellaneous General Info

SetID 50100 Customer ID 0000167446 General Info Links ...More

*Status Active

Level Regular

*Date Added 05/29/2024

*Since 05/29/2024

*Type Business

*Name 1 Ann D LLC

Alt Name 1

*Short Name Ann D LLC

Name 2

Alt Name 2

Email ID addg@zhotmail.com

Currency Code USD

Rate Type CRRNT

Roles

<input checked="" type="checkbox"/> Bill To Customer Bill To Selection	<input checked="" type="checkbox"/> Correspondence Customer Correspondence Selection	
--	--	--

... More

0020 - Additional General Info

0030 - Credit Profile

0040 - Correspondence Options

0050 - Region Code Info

0070 - Customer Group

0080 - Tax Exempt Certificates

0090 - VAT Info

0100 - Notes

0110 - Attachments

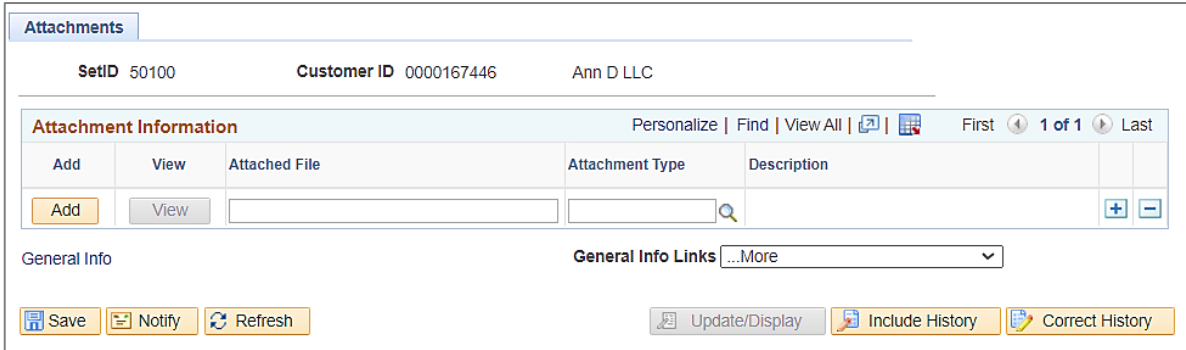
0120 - Messages

0130 - User Defined

Contact Info (New Window)

Step	Action
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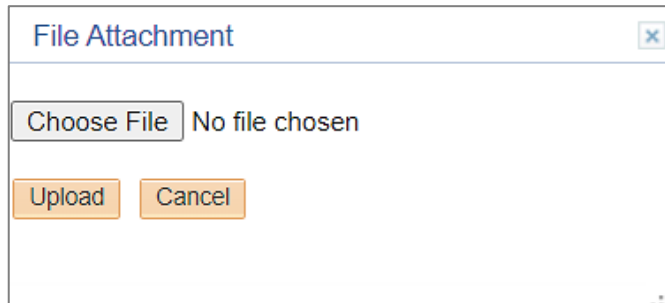
The **Attachments** page displays.



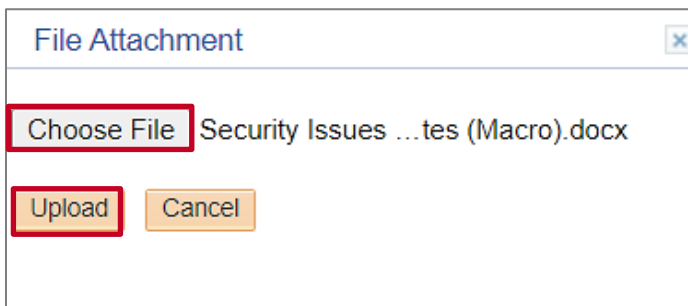
6. Click the **Add** button to select, browse, and upload the attachment.






The **File Attachment** pop up box displays.



7. Click the **Choose File** to locate your file and then click the **Upload** button.



Step	Action						
8.	<p>Click the View button to review the attachment.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p style="margin: 0;">Attachment Information</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="text-align: center; width: 15%;">Add</th> <th style="text-align: center; width: 15%;">View</th> <th style="text-align: left; width: 70%;">Attached File</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Add</td> <td style="text-align: center; border: 2px solid red;">View</td> <td>Security_Issues_when_opening_templates_</td> </tr> </tbody> </table> </div>	Add	View	Attached File	Add	View	Security_Issues_when_opening_templates_
Add	View	Attached File					
Add	View	Security_Issues_when_opening_templates_					
9.	<p>Click the Save button to save the attachment.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p style="margin: 0; color: #4f81bd;">General Info</p> <div style="margin-top: 10px;">  Save  Notify  Refresh </div> </div>						

Adding Notes

Notes can be used to enter additional information about a customer.

Step	Action
1.	<p>Navigate to the General Information page using the following path: Main Menu > Customers > Customer Information > General Information</p> <p>The General Information page displays the Find an Existing Value tab.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>General Information</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p> <input type="button" value="Find an Existing Value"/> <input type="button" value="Add a New Value"/> </p> <p> ▼ Search Criteria </p> <p>*SetID = <input type="text"/> <input type="button" value="🔍"/></p> <p>Customer ID <input type="text" value="begins with"/> <input type="text"/> <input type="button" value="🔍"/></p> <p>Name 1 <input type="text" value="begins with"/> <input type="text"/></p> <p>Name 2 <input type="text" value="begins with"/> <input type="text"/></p> <p>Telephone <input type="text" value="begins with"/> <input type="text"/></p> <p>City <input type="text" value="begins with"/> <input type="text"/></p> <p>State <input type="text" value="begins with"/> <input type="text"/></p> <p>Postal Code <input type="text" value="begins with"/> <input type="text"/></p> <p> <input type="checkbox"/> Include History <input type="checkbox"/> Case Sensitive </p> <p>Limit the number of results to (up to 300): <input type="text" value="300"/></p> <p> <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Basic Search"/> <input type="button" value="Save Search Criteria"/> </p> </div>
2.	<p>The SetID should default based on your Business Unit. If it does not, select the applicable SetID using the SetID Look Up icon.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>*SetID = <input type="text"/> <input type="button" value="🔍"/></p> </div>
3.	<p>Enter or select the Customer's ID using the Customer ID Look Up icon.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p>Customer ID <input type="text" value="begins with"/> <input type="text"/> <input type="button" value="🔍"/></p> </div>

Step	Action
4.	Click the Search button. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 2px solid red; padding: 5px 15px; background-color: #fff;">Search</div> <div style="border: 1px solid #ccc; padding: 5px 15px; background-color: #fff;">Clear</div> <div style="color: #0070c0;">Basic Search</div> <div style="font-size: 1.2em;">🔍</div> <div style="color: #0070c0;">Save Search Criteria</div> </div> </div>

The **General Info** tab displays.

General Info
Bill To Options
Ship To Options
Sold To Options
Miscellaneous General Info

SetID 50100
Customer ID 0000167446
General Info Links ...More

*Status Active

*Date Added 05/29/2024 BT

*Name 1 Ann D LLC

Name 2

Email ID addg@zhotmail.com

Currency Code USD

*Since 05/29/2024 BT

Alt Name 1

Alt Name 2

Rate Type CRRNT

Level Regular

*Type Business

*Short Name Ann D LLC

Roles

<input checked="" type="checkbox"/> Bill To Customer Bill To Selection	<input checked="" type="checkbox"/> Correspondence Customer Correspondence Selection	
<input checked="" type="checkbox"/> Ship To Customer Ship To Selection	<input type="checkbox"/> Remit From Customer Remit From Selection	50100 0000000004
<input checked="" type="checkbox"/> Sold To Customer Sold To Selection	<input type="checkbox"/> Corporate Customer Corporate Selection	50100 0000000007
<input type="checkbox"/> Broker Customer	<input type="checkbox"/> Consolidation Customer	Consolidation Business Unit
<input type="checkbox"/> Indirect Customer		

Federal Attributes

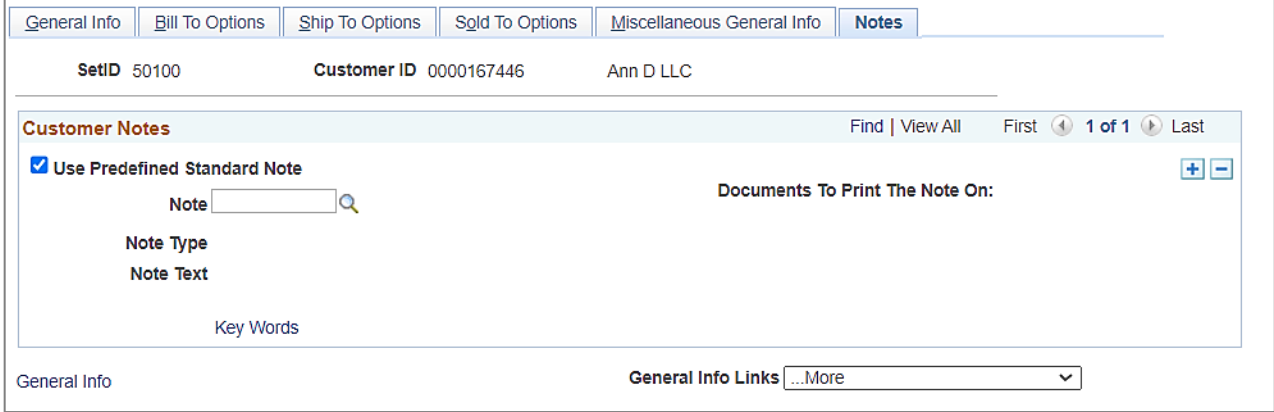
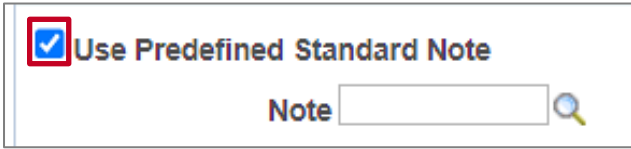

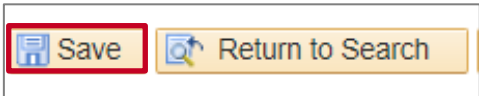
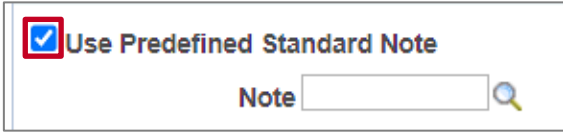
Federal Customer Trading Partner Code Disbursing Office

Appropriation Symbol Not Required for Reimbursable Agreements

Contracts Options

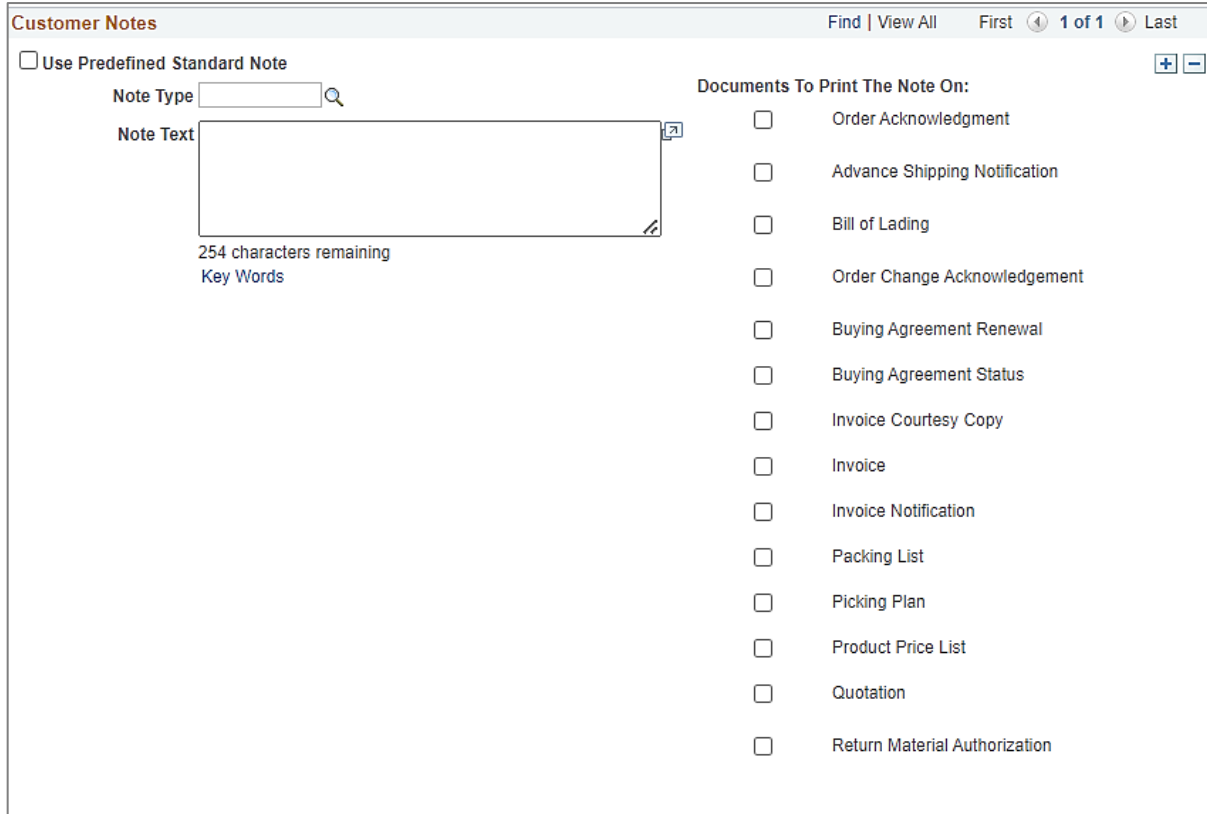
Hold Billing on Unpaid Cost

5.	Select "0100 – Notes" from the General Info Links dropdown menu. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <div style="display: flex; border-bottom: 1px solid #ccc; margin-bottom: 10px;"> General Info Bill To Options Ship To Options Sold To Options Miscellaneous General Info </div> <div style="display: flex; justify-content: space-between; margin-bottom: 10px;"> SetID 50100 Customer ID 0000167446 General Info Links ...More </div> <div style="display: flex; justify-content: space-between; margin-bottom: 10px;"> <div style="width: 30%;"> <p>*Status Active</p> <p>*Date Added 05/29/2024 BT</p> <p>*Name 1 Ann D LLC</p> <p>Name 2 </p> <p>Email ID addg@zhotmail.com</p> <p>Currency Code USD</p> </div> <div style="width: 30%;"> <p>*Since 05/29/2024 BT</p> <p>Alt Name 1 </p> <p>Alt Name 2 </p> <p>Rate Type CRRNT</p> </div> <div style="width: 30%;"> <p style="font-size: 0.8em;">...More</p> <ul style="list-style-type: none"> <li style="border: 1px solid #ccc; padding: 2px 5px; margin-bottom: 2px;">...More <li style="border: 1px solid #ccc; padding: 2px 5px; margin-bottom: 2px;">0020 - Additional General Info <li style="border: 1px solid #ccc; padding: 2px 5px; margin-bottom: 2px;">0030 - Credit Profile <li style="border: 1px solid #ccc; padding: 2px 5px; margin-bottom: 2px;">0040 - Correspondence Options <li style="border: 1px solid #ccc; padding: 2px 5px; margin-bottom: 2px;">0050 - Region Code Info <li style="border: 1px solid #ccc; padding: 2px 5px; margin-bottom: 2px;">0070 - Customer Group <li style="border: 1px solid #ccc; padding: 2px 5px; margin-bottom: 2px;">0080 - Tax Exempt Certificates <li style="border: 1px solid #ccc; padding: 2px 5px; margin-bottom: 2px;">0090 - VAT Info <li style="border: 2px solid red; padding: 2px 5px; margin-bottom: 2px;">0100 - Notes <li style="border: 1px solid #ccc; padding: 2px 5px; margin-bottom: 2px;">0110 - Attachments <li style="border: 1px solid #ccc; padding: 2px 5px; margin-bottom: 2px;">0120 - Messages <li style="border: 1px solid #ccc; padding: 2px 5px; margin-bottom: 2px;">0130 - User Defined <li style="border: 1px solid #ccc; padding: 2px 5px;">Contact Info (New Window) </div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Roles</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;"><input checked="" type="checkbox"/> Bill To Customer Bill To Selection</td> <td style="width: 33%;"><input checked="" type="checkbox"/> Correspondence Customer Correspondence Selection</td> <td style="width: 33%;"></td> </tr> </table> </div> </div>	<input checked="" type="checkbox"/> Bill To Customer Bill To Selection	<input checked="" type="checkbox"/> Correspondence Customer Correspondence Selection	
<input checked="" type="checkbox"/> Bill To Customer Bill To Selection	<input checked="" type="checkbox"/> Correspondence Customer Correspondence Selection			

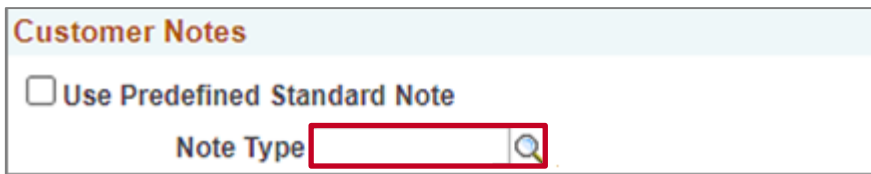
Step	Action
	<p>The Customer Notes page displays.</p> 
6.	<p>The Use Predefined Standard Note checkbox option defaults as checked. This allows you to select a standard note. If you want to create your own note, skip to step 9.</p> 
7.	<p>Select the applicable option using the Note Look Up icon.</p> 
8.	<p>Click the Save button.</p> 
9.	<p>If you want to create your own note, uncheck the Use Predefined Standard Note checkbox option.</p> 

Step	Action
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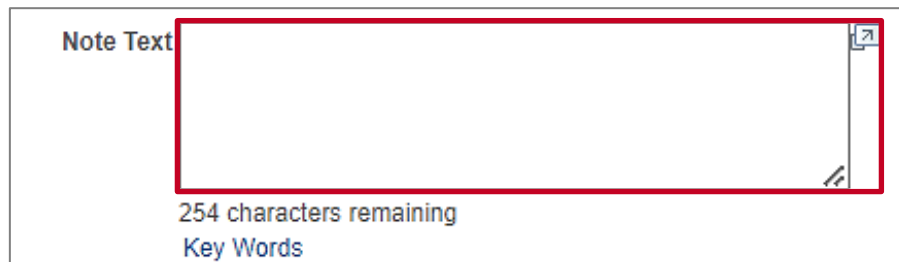
The **Customer Notes** page displays.

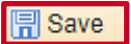
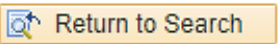
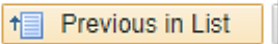


10. Select the Note Type using the **Note Type Look Up** icon.



11. Enter a free form note in the **Note Text** field. This field holds up to 254 characters.



Step	Action
12.	<p>Select the applicable Documents to Print the Note On checkbox option(s).</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Documents To Print The Note On:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Order Acknowledgment <input type="checkbox"/> Advance Shipping Notification <input type="checkbox"/> Bill of Lading <input type="checkbox"/> Order Change Acknowledgement <input type="checkbox"/> Buying Agreement Renewal <input type="checkbox"/> Buying Agreement Status <input type="checkbox"/> Invoice Courtesy Copy <input type="checkbox"/> Invoice <input type="checkbox"/> Invoice Notification <input type="checkbox"/> Packing List <input type="checkbox"/> Picking Plan <input type="checkbox"/> Product Price List <input type="checkbox"/> Quotation <input type="checkbox"/> Return Material Authorization </div>
13.	<p>Click the Save button to save the note.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;">    </div>