



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, the user must check to see if the customer is already established in Cardinal.

Cardinal stores all the information needed for a customer. Customer profiles allow users 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, the user may need to update customer information. In Cardinal, users can update the customer's Type and other general information using the same **General Information** page used to initially enter the customer.

Navigation Note: Please note that there may be 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.



Accounts Receivable Job Aid

AR323 Creating and Maintaining Customers (VDOT Only)

Table of Contents

Revision History3

Verifying that the Customer Does Not Already Exist4

Entering a New Customer7

Setting Up Customer Correspondence Options23

Adding Attachments30

Adding Notes35



Accounts Receivable Job Aid

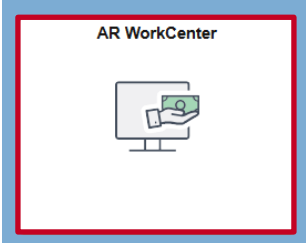
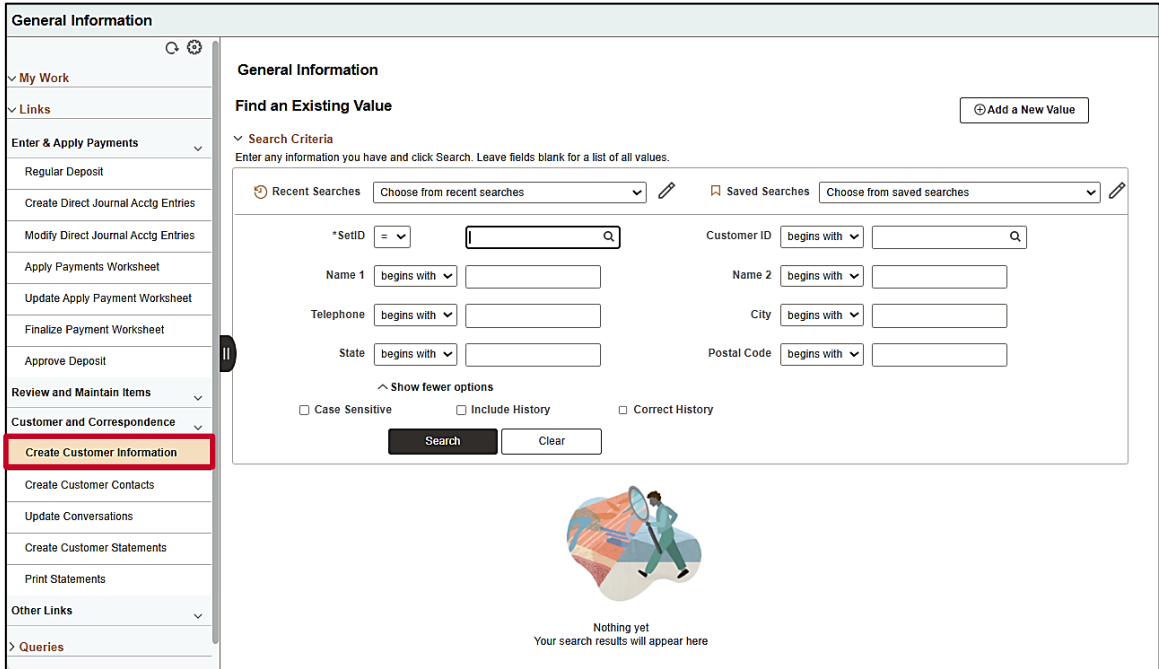
AR323 Creating and Maintaining Customers (VDOT Only)

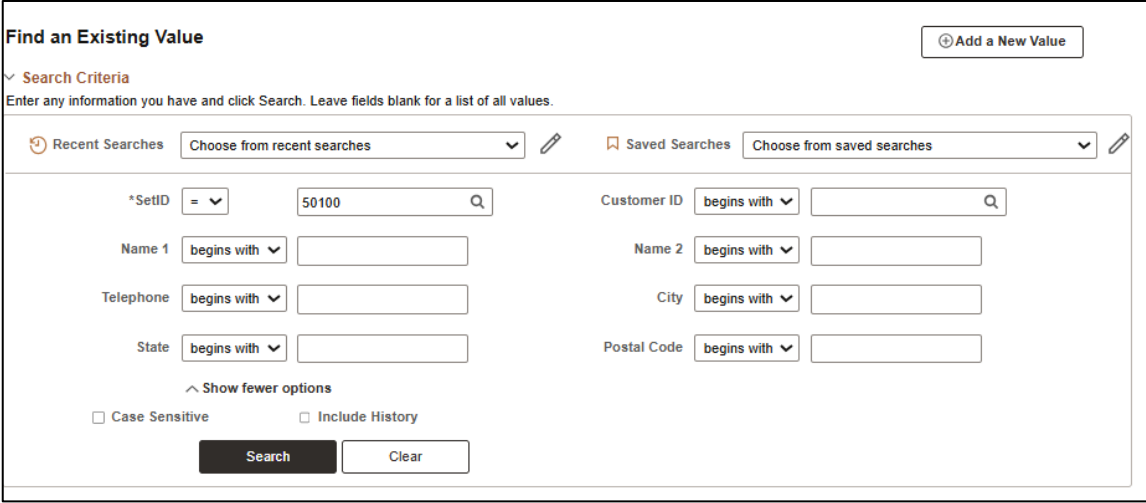
Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
8/15/2024	Baseline.

Verifying that the Customer Does Not Already Exist

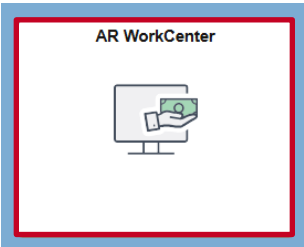
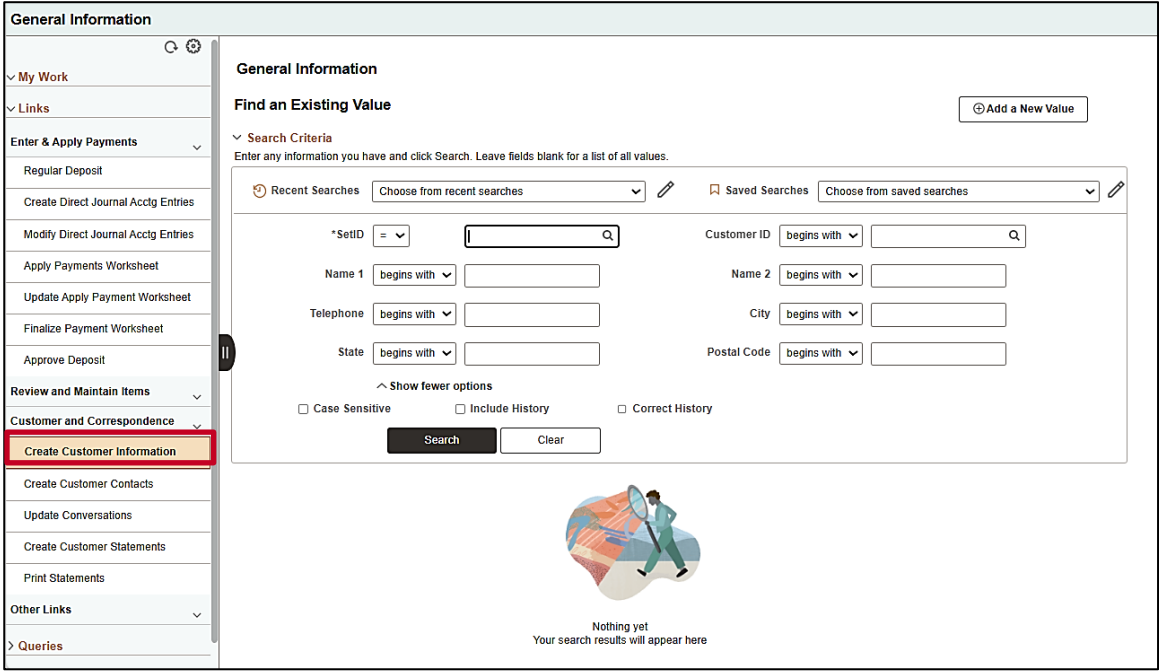
This step is required before creating a customer to prevent duplication.

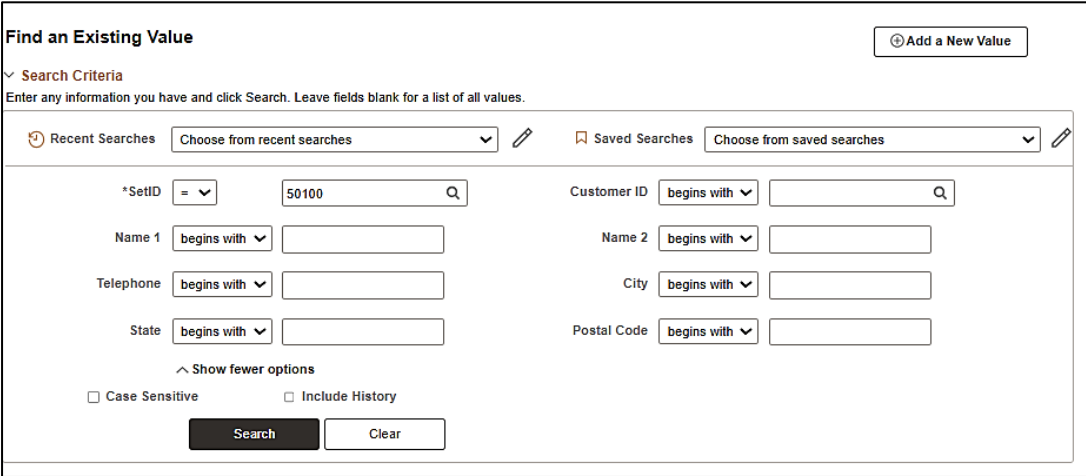
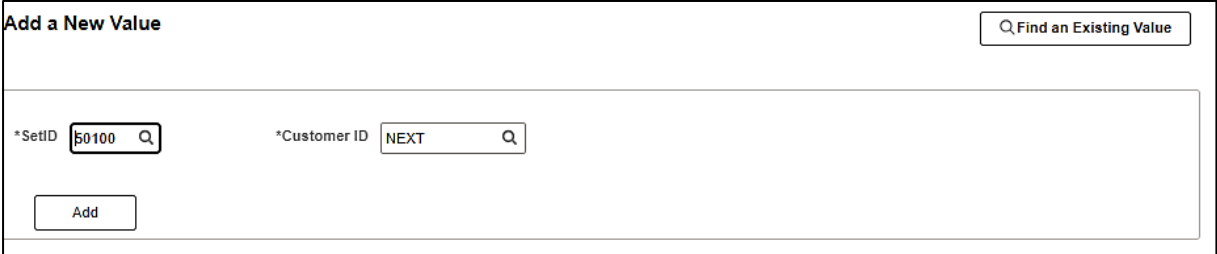
Step	Action
1.	Navigate to the Create Customer Information page by clicking the AR WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning
2.	Use the following navigation path in the WorkCenter: Links > Customer and Correspondence > Create Customer Information Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Create Customer Information page using the following navigation path: NavBar > Menu > Customers > Customer Information > Create Customer Information

Step	Action
	The General Information Find an Existing Value Search page displays. 
	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled Overview of the Cardinal FIN Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.
3.	Select the applicable Business Unit using the SetID Look up icon. 
4.	Enter the Customer name in the Name 1 field. 
	If unsure of the Customer name, change the search criteria to “contains” and search for part of the name. Search criteria can be added using a combination of additional fields such as Telephone, City, State, and/or Postal Code.
5.	Click the Search button. 

Step	Action
	If the customer's name that was entered does not match an existing customer, the message "No matching values were found." displays. Refer to the Entering a New Customer section of this Job Aid to proceed and create a new customer. ✓ Search Results No matching values were found. If the customer exists, a customer does not need to be created since they are already in the system.

Entering a New Customer

Step	Action
1.	Navigate to the Create Customer Information page by clicking the AR WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning
2.	Use the following navigation path in the WorkCenter: Links > Customer and Correspondence > Create Customer Information Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Create Customer Information page using the following navigation path: NavBar > Menu > Customers > Customer Information > Create Customer Information

Step	Action
	The General Information Find an Existing Value Search page displays. 
	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled Overview of the Cardinal FIN Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.
3.	Click the Add a New Value button. 
	The Add a New Value page displays. 
4.	If the Business Unit does not default in the SetID field, select the applicable Business Unit using the SetID Look up icon. 



Accounts Receivable Job Aid

AR323 Creating and Maintaining Customers (VDOT Only)

Step	Action
	The Customer ID field defaults to “NEXT”. Do not change. *Customer ID NEXT When the required customer information has been entered and saved, Cardinal updates “NEXT” to the next available sequential Customer ID Number.
5.	Click the Add button. Add

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

*Status

Copy From Customer

Level

*Date Added

*Since

*Type

*Name 1

Name 2

Email ID

Currency Code

Rate Type

*Short Name

Roles

☐ Bill To Customer
☐ Bill To Selection
☐ Ship To Customer
☐ Ship To Selection
☐ Sold To Customer
☐ Sold To Selection
☐ Broker Customer
☐ Indirect Customer

☐ Correspondence Customer
Correspondence Selection
☐ Remit From Customer
Remit From Selection
☒ Corporate Customer
Corporate Selection
☐ Consolidation Customer

Consolidation Business Unit

Federal Attributes

☐ Federal Customer
Trading Partner Code Disbursing Office

☐ Appropriation Symbol Not Required for Reimbursable Agreements

	The Status field defaults to “Active” and should not be changed. *Status Active
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Step	Action
6.	The Date Added and Since fields default to the current date. Update these dates as needed using the corresponding Calendar icons. *Date Added 07/21/2026  *Since 07/21/2026 
	The Level field defaults to “Regular” and should not be changed. Level Regular 
7.	Select the applicable Customer Type using the Type dropdown button (“Business”, “Government”, “Individual”, or “State Agency”). *Type Individual 
8.	Enter the name of the customer in the Name 1 field. *Name 1 *Short Name
	The Short Name field populates using the first 10 characters of the value entered in the Name 1 field. The Name 2 field can be used for additional information as needed. Name 2
9.	Click the Currency Code Look up icon and select “USD”. Currency Code USD 
10.	Click the Rate Type Look up icon and select “CRRNT”. Rate Type CRRNT 



Accounts Receivable Job Aid

AR323 Creating and Maintaining Customers (VDOT Only)

Step	Action										
11.	Select the applicable checkbox options (Bill to Customer, Ship to Customer, and/or Sold to Customer) in the Roles section. Roles <table><tbody><tr><td>☐ Bill To Customer Bill To Selection</td><td>☐ Correspondence Customer Correspondence Selection</td></tr><tr><td>☐ Ship To Customer Ship To Selection</td><td>☐ Remit From Customer Remit From Selection</td></tr><tr><td>☐ Sold To Customer Sold To Selection</td><td>☒ Corporate Customer Corporate Selection</td></tr><tr><td>☐ Broker Customer</td><td>☐ Consolidation Customer</td></tr><tr><td>☐ Indirect Customer</td><td></td></tr></tbody></table>	☐ Bill To Customer Bill To Selection	☐ Correspondence Customer Correspondence Selection	☐ Ship To Customer Ship To Selection	☐ Remit From Customer Remit From Selection	☐ Sold To Customer Sold To Selection	☒ Corporate Customer Corporate Selection	☐ Broker Customer	☐ Consolidation Customer	☐ Indirect Customer	
☐ Bill To Customer Bill To Selection	☐ Correspondence Customer Correspondence Selection										
☐ Ship To Customer Ship To Selection	☐ Remit From Customer Remit From Selection										
☐ Sold To Customer Sold To Selection	☒ Corporate Customer Corporate Selection										
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☐ Indirect Customer											



Accounts Receivable Job Aid

AR323 Creating and Maintaining Customers (VDOT Only)

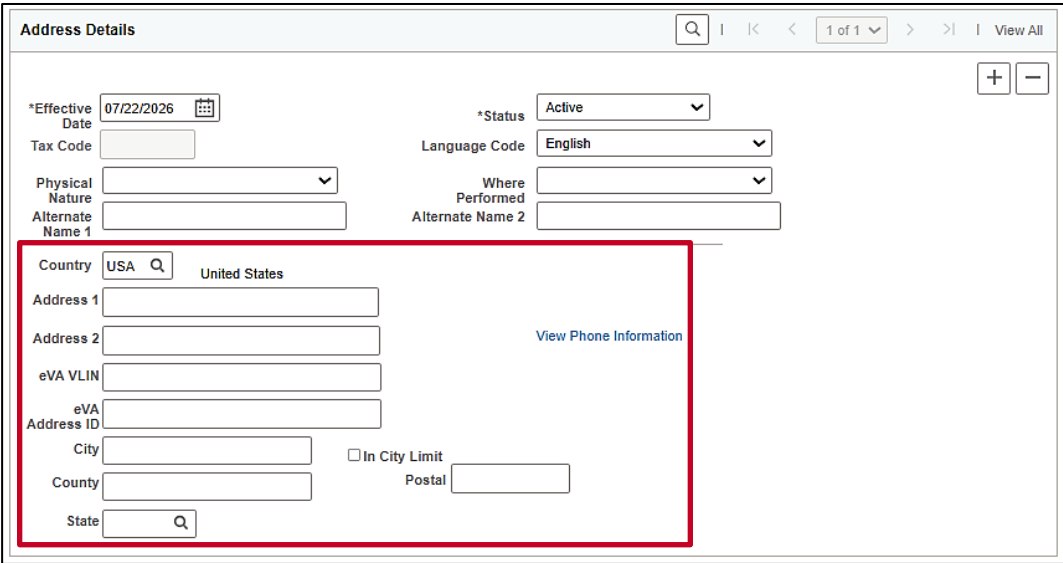
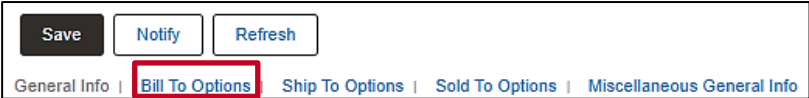
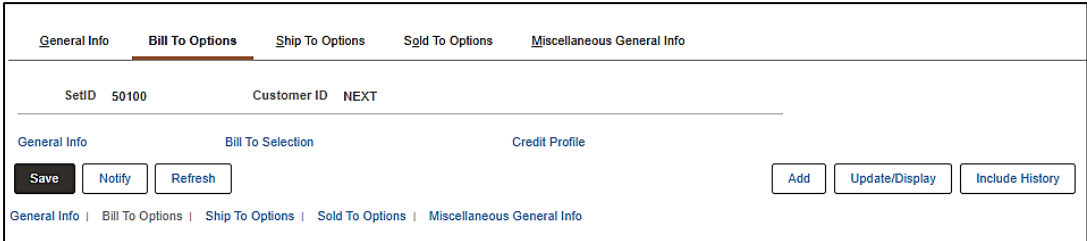
Step	Action										
	The bottom section of the General Info tab displays after scrolling down. Federal Attributes ☐ Federal CustomerTrading Partner Code Disbursing Office ☐ Appropriation Symbol Not Required for Reimbursable Agreements Contracts Options ☐ Hold Billing on Unpaid Cost Support Teams 1-1 of 1 View All <table><thead><tr><th>Team Code</th><th>Default</th><th>Description</th><th></th><th></th></tr></thead><tbody><tr><td> </td><td>☐</td><td></td><td>+</td><td>-</td></tr></tbody></table> Address Locations 1 of 1 View All *Location 1 Description ☐ Bill To☐ Ship To☐ Sold To ☐ Primary☐ Primary☐ Primary ☐ Broker☐ Indirect☐ Correspondence Address ☐ RFID Enabled VAT Default VAT Service Treatment Setup 1 of 1 View All *Effective Date 07/21/2026 *Status Active Tax Code Language Code English Physical Nature Where Performed Alternate Name 1 Alternate Name 2 Country USA United States Address 1 Address 2 eVA VLIN eVA Address ID City County State ☐ In City Limit Postal View Phone Information General Info Links ...More Save Notify Refresh Add Update/Display Include History General Info Bill To Options Ship To Options Sold To Options Miscellaneous General Info	Team Code	Default	Description				☐		+	-
Team Code	Default	Description									
	☐		+	-							

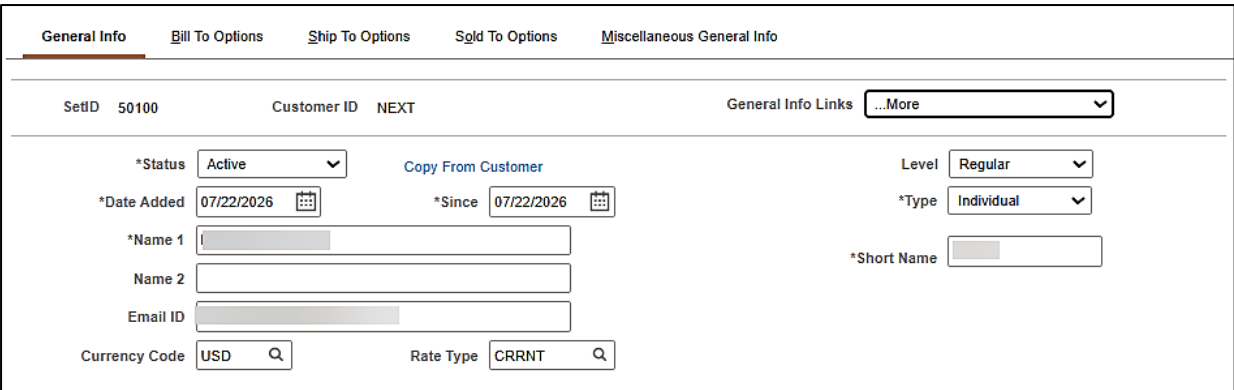
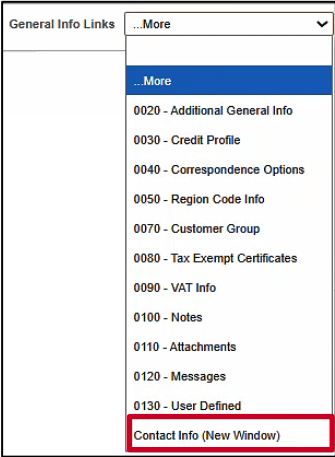


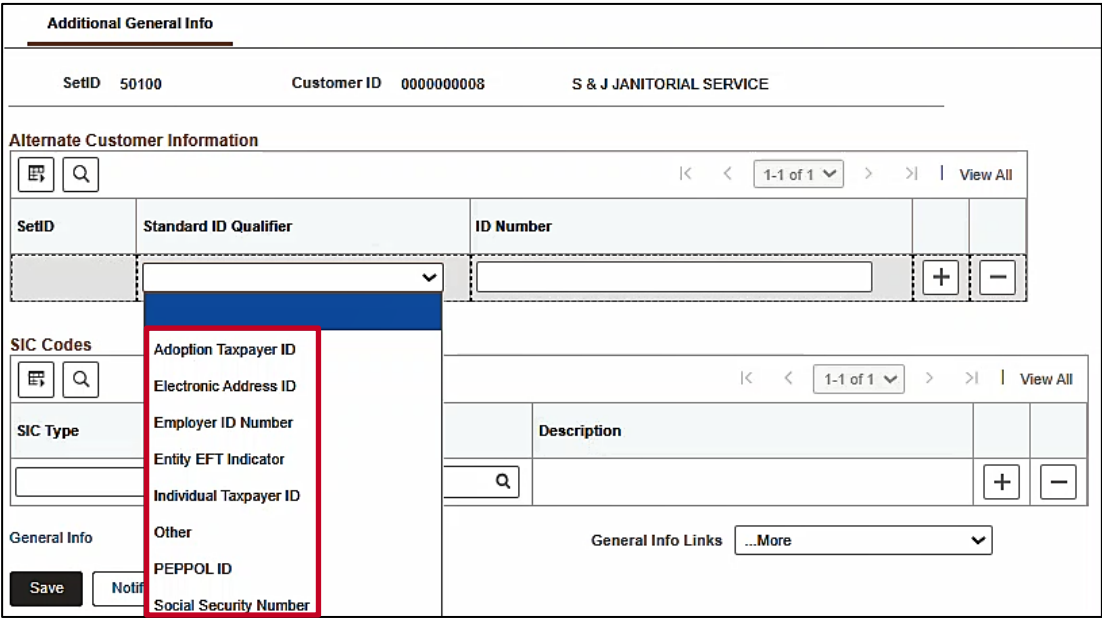
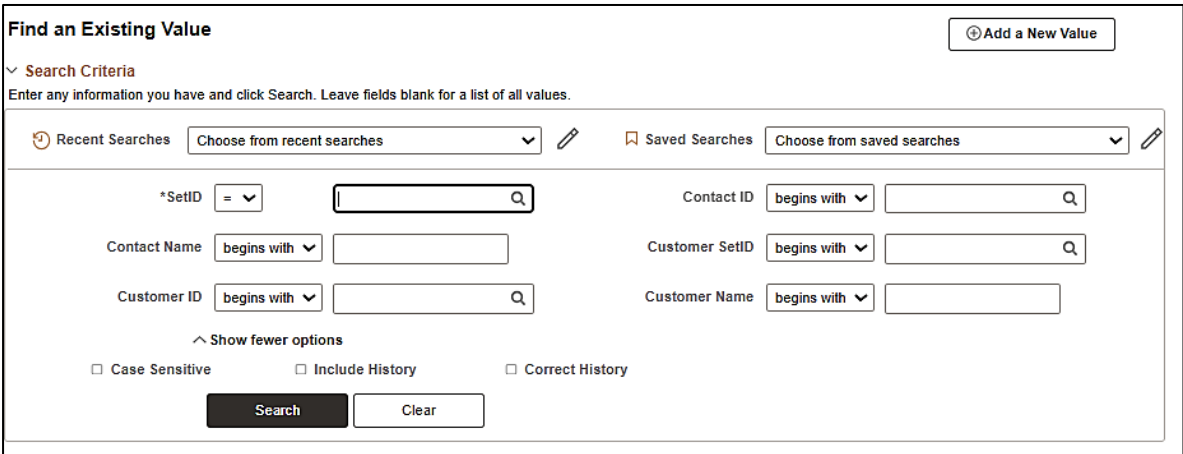
Accounts Receivable Job Aid

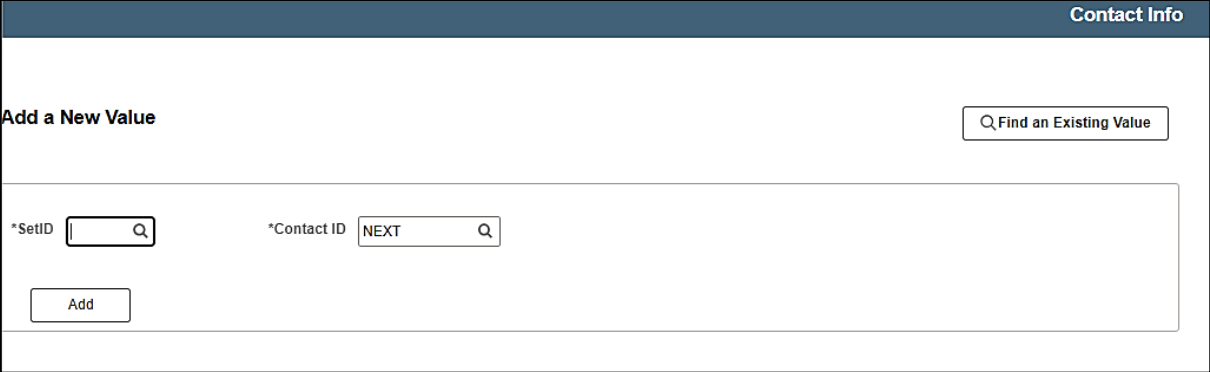
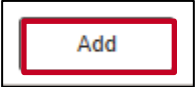
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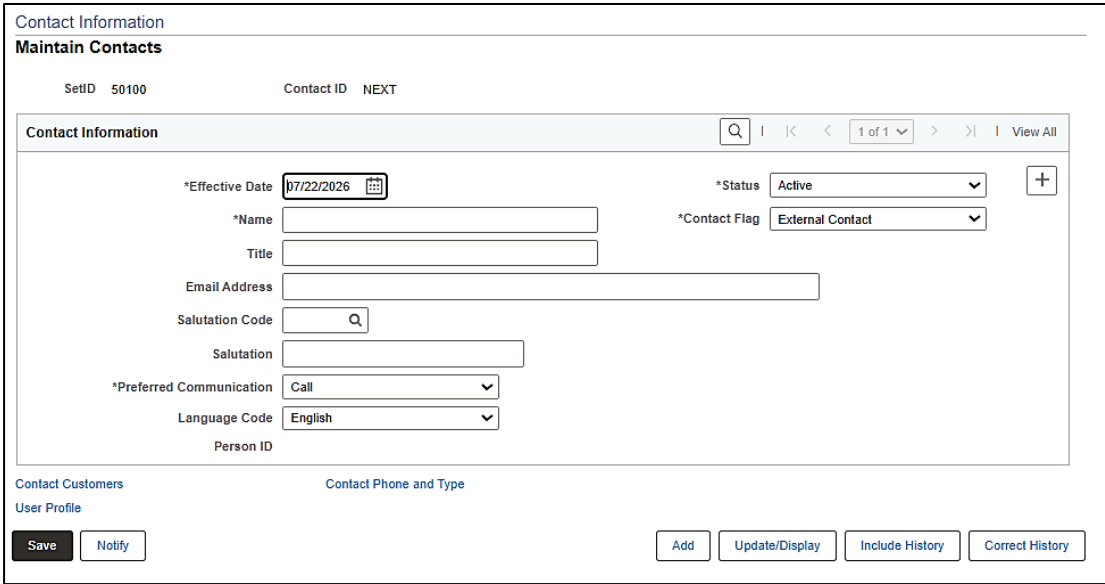
Step	Action						
12.	Select the Federal Customer checkbox option if “Government” was selected as the Customer Type. Federal Attributes ☐ Federal Customer Trading Partner Code Disbursing Office ☐ Appropriation Symbol Not Required for Reimbursable Agreements						
i	If the Federal Customer checkbox is selected, the user must enter 999999 in the Trading Partner Code. Federal Attributes ☒ Federal Customer Trading Partner Code 999999 Disbursing Office ☐ Appropriation Symbol Not Required for Reimbursable Agreements						
i	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. Contracts Options ☐ Hold Billing on Unpaid Cost						
13.	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. Support Teams 1-1 of 1 < > View All <table><thead><tr><th>Team Code</th><th>Default</th><th>Description</th></tr></thead><tbody><tr><td> </td><td>☐</td><td></td></tr></tbody></table> + -	Team Code	Default	Description		☐	
Team Code	Default	Description					
	☐						
14.	Select the applicable address location checkbox options (Bill To, Ship To, and/or Sold To). Select the Primary checkbox option for each one selected. Address Locations *Location 1 Description ☐ Bill To ☐ Ship To ☐ Sold To ☐ Primary ☐ Primary ☐ Primary						

Step	Action
15.	Enter the customer address information in the Address Details section. 
16.	Click the Bill To Options link at the bottom of the page. 
The Bill To Options tab displays. 	
17.	Click the Credit Analyst Look up icon and select the applicable Credit Analyst. 
18.	Click the Collector Look up icon and select the applicable Collector (typically, the person entering the customer information is the Collector). 

Step	Action
19.	Click the General Info tab. 
	The General Info tab redisplay. 
20.	Click the General Info Links dropdown button and select the Contract Info (New Window) list item. 

Step	Action
	The General Info Links dropdown menu contains additional customer data options. 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. The Additional General Info page contains sensitive data (e.g., Social Security Number, Individual Taxpayer ID). The Standard ID Qualifier field is used to enter a Standard ID type. 
	The Contact Info Find an Existing Value Search page displays in a new window. 
21.	Click the Add a New Value button. 

Step	Action
	The Add a New Value page displays. 
22.	Click the SetID Look up icon and select the applicable Business Unit. 
	The Contact ID field should display "NEXT". Do not change. 
23.	Click the Add button. 

Step	Action
	The Customer Information Maintain Contacts page displays. 
	In the Contact Information section, some contact information is required. Required fields are: - Effective Date (defaults to the current date) - Name - Status (defaults to “Active”) - Contact Flag (defaults to “External Contact”) Optional fields are: - Title - Email ID - Salutation Code - Salutation - Preferred Communication - Language Code
24.	The Effective Date field defaults to the current date. Update the effective date as needed using the Effective Date Calendar icon. 
25.	Enter the name of the contact in Name field. 

Step	Action
26.	Click the Preferred Communication dropdown button and select the applicable preferred communication option. *Preferred Communication Call
27.	If the Status field does not default to “Active”, click the Status dropdown button and select “Active”. *Status Active
28.	If the Contact Flag field does not default to “External Contact”, click the Contact Flag dropdown button and select “External Contact”. *Contact Flag External Contact
29.	Click the Contact Phone and Type link at the bottom of the page. Contact Phone and Type

Rev 9/1/2026 Page 20 of 40

Step	Action																				
31.	Click the Contact Customers link at the bottom of the page to link this contact to the new customer. Contact Information Contact Customers User Profile																				
The Contact Information Contact Customers page displays. Contact Information Contact Customers Contact SetID 50100Contact ID NEXT Contact Information Effective Date 07/22/2026Name Link Contact to Customer CustomerSelf Service Security <table><thead><tr><th>*Customer SetID</th><th>*Customer ID</th><th>Customer Name</th><th>Location</th><th>Credit Cards</th><th>Documentation</th><th>Primary Bill To</th><th>Primary Ship To</th><th>Primary Sold To</th><th>Courtesy Copy</th></tr></thead><tbody><tr><td>50100</td><td></td><td></td><td></td><td>Credit Cards</td><td>Documentation</td><td>☐</td><td>☐</td><td>☐</td><td>☐</td></tr></tbody></table> Contact InformationContact Phone and TypeUser Profile SaveNotifyAddUpdate/DisplayInclude HistoryCorrect History		*Customer SetID	*Customer ID	Customer Name	Location	Credit Cards	Documentation	Primary Bill To	Primary Ship To	Primary Sold To	Courtesy Copy	50100				Credit Cards	Documentation	☐	☐	☐	☐
*Customer SetID	*Customer ID	Customer Name	Location	Credit Cards	Documentation	Primary Bill To	Primary Ship To	Primary Sold To	Courtesy Copy												
50100				Credit Cards	Documentation	☐	☐	☐	☐												
32.	Click the Customer ID Look up icon and select the applicable Customer ID. *Customer ID																				
i	Once the Customer ID is selected, the Customer Name field populates. 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. <table><thead><tr><th>Primary Bill To</th><th>Primary Ship To</th><th>Primary Sold To</th><th>Courtesy Copy</th><th></th><th></th></tr></thead><tbody><tr><td>☐</td><td>☐</td><td>☐</td><td>☐</td><td> + </td><td> - </td></tr></tbody></table>	Primary Bill To	Primary Ship To	Primary Sold To	Courtesy Copy			☐	☐	☐	☐	+	-								
Primary Bill To	Primary Ship To	Primary Sold To	Courtesy Copy																		
☐	☐	☐	☐	+	-																
33.	Select the location using the Location Look up icon. Location																				

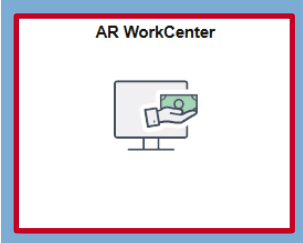
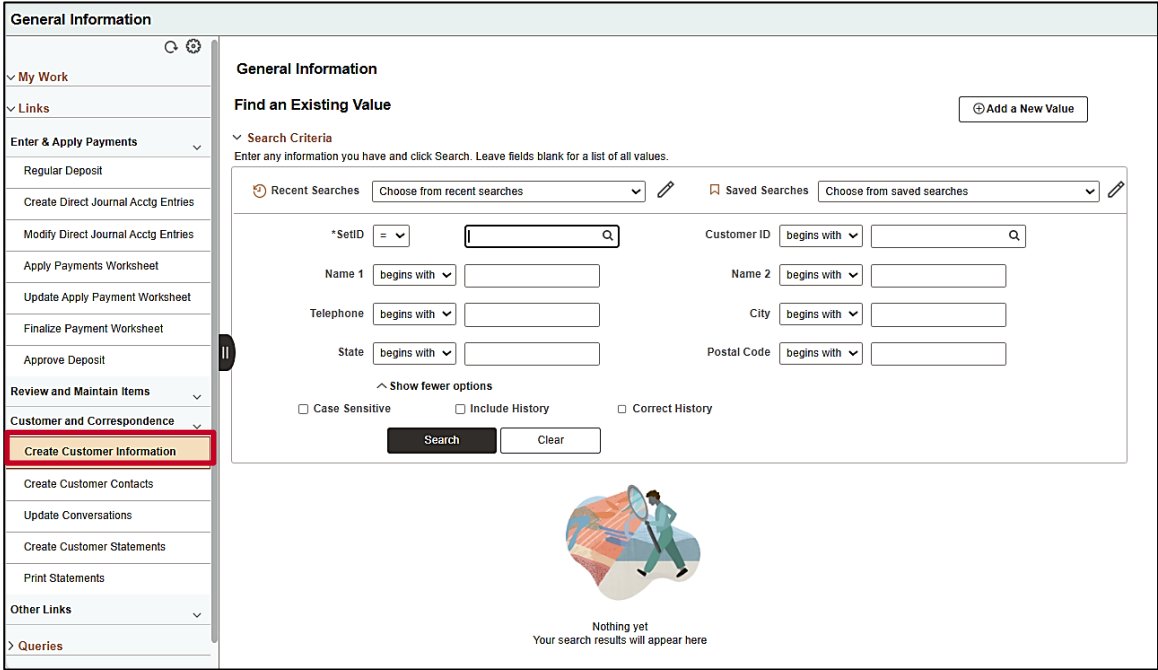
Accounts Receivable Job Aid

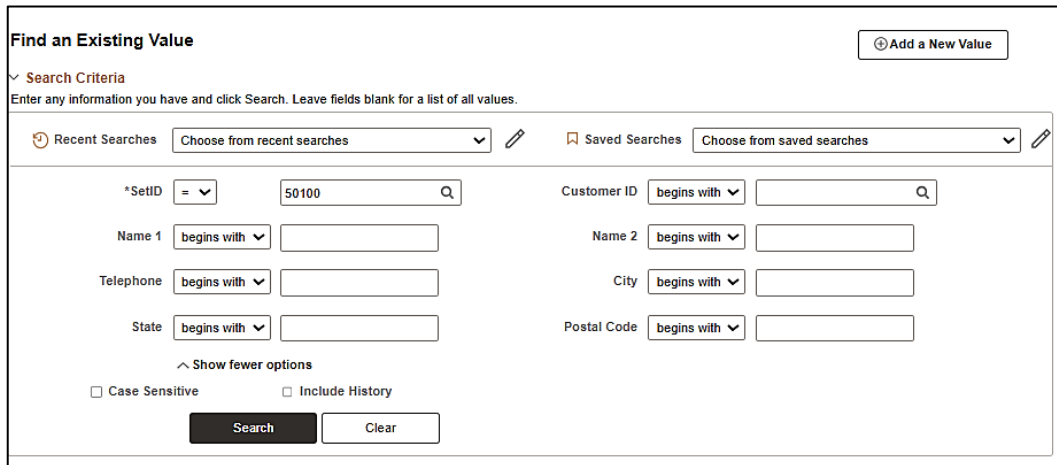
AR323 Creating and Maintaining Customers (VDOT Only)

Step	Action																										
	The Location field is populated along with the Primary Bill To, Primary Ship To, and Primary Sold To checkbox options. <table border="1"><tr><td>*Customer SetID</td><td>*Customer ID</td><td>Customer Name</td><td>Location</td><td></td><td>Credit Cards</td><td>Documentation</td><td>Primary Bill To</td><td>Primary Ship To</td><td>Primary Sold To</td><td>Courtesy Copy</td><td></td><td></td></tr><tr><td>50100</td><td>0000000004</td><td>BOWMAN CONSULTING</td><td>1</td><td>FINGERPRINTING</td><td>Credit Cards</td><td>Documentation</td><td>☐</td><td>☐</td><td>☐</td><td>☐</td><td>+</td><td>-</td></tr></table>	*Customer SetID	*Customer ID	Customer Name	Location		Credit Cards	Documentation	Primary Bill To	Primary Ship To	Primary Sold To	Courtesy Copy			50100	0000000004	BOWMAN CONSULTING	1	FINGERPRINTING	Credit Cards	Documentation	☐	☐	☐	☐	+	-
*Customer SetID	*Customer ID	Customer Name	Location		Credit Cards	Documentation	Primary Bill To	Primary Ship To	Primary Sold To	Courtesy Copy																	
50100	0000000004	BOWMAN CONSULTING	1	FINGERPRINTING	Credit Cards	Documentation	☐	☐	☐	☐	+	-															
34.	Click the Save button when the contact information is complete. Contact Information Contact Phone and Type User Profile Save Notify																										
	Once information is saved, Cardinal updates the Contact ID field in the Header section with the next available sequential number. Contact SetID 50100 Contact ID 259																										

Setting Up Customer Correspondence Options

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

Step	Action
1.	Navigate to the Create Customer Information page by clicking the AR WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning
2.	Use the following navigation path in the WorkCenter: Links > Customer and Correspondence > Create Customer Information Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 

Step	Action
	Users can also access the Create Customer Information page using the following navigation path: NavBar > Menu > Customers > Customer Information > Create Customer Information
The General Information Find an Existing Value Search page displays. 	
	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled Overview of the Cardinal FIN Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.
3.	Click the SetID Look up icon and select the applicable Business Unit. 
4.	Click the Customer ID Look up icon and select the applicable Customer ID. 
5.	Click the Search button. 



Accounts Receivable Job Aid

AR323 Creating and Maintaining Customers (VDOT Only)

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	0000133052	General Info Links	...More
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*Status	Active	Level	Regular		
*Date Added	08/28/2009	*Since	08/28/2009	*Type	Business
*Name 1	MWAA	*Short Name	MWAA		
Name 2					
Email ID					
Currency Code	USD	Rate Type	CRRNT		

Roles

☒ Bill To Customer Bill To Selection	☒ Correspondence Customer Correspondence Selection
☒ Ship To Customer Ship To Selection	☒ Remit From Customer Remit From Selection
☒ Sold To Customer Sold To Selection	☒ Corporate Customer Corporate Selection
☐ Broker Customer	☐ Consolidation Customer
☐ Indirect Customer	

Consolidation Business Unit

6. Click the **General Info Links** dropdown button and select the “0040 - Correspondence Options” list item.

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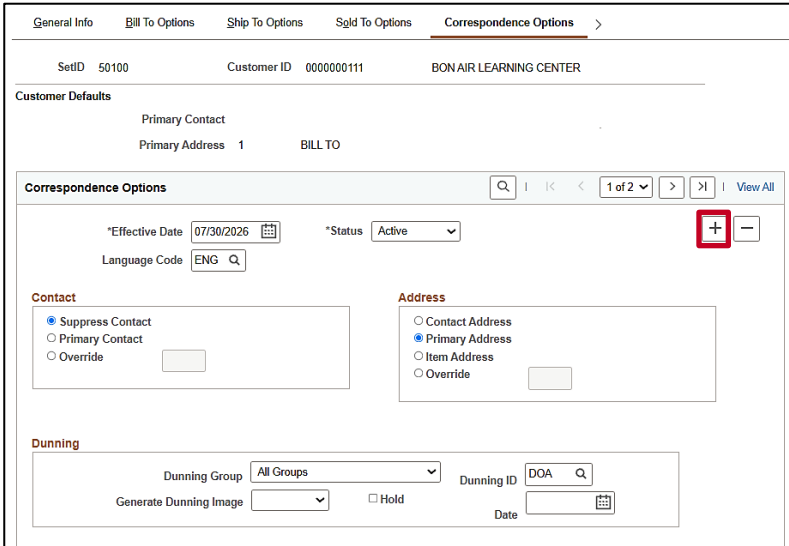
...More
0020 - Additional General Info
0030 - Credit Profile
0040 - Correspondence Options
0050 - Region Code Info
0070 - Customer Group
0080 - Tax Exempt Certificates
0090 - VAT Info
0100 - Notes
0110 - Attachments
0120 - Messages
0130 - User Defined
Contact Info (New Window)



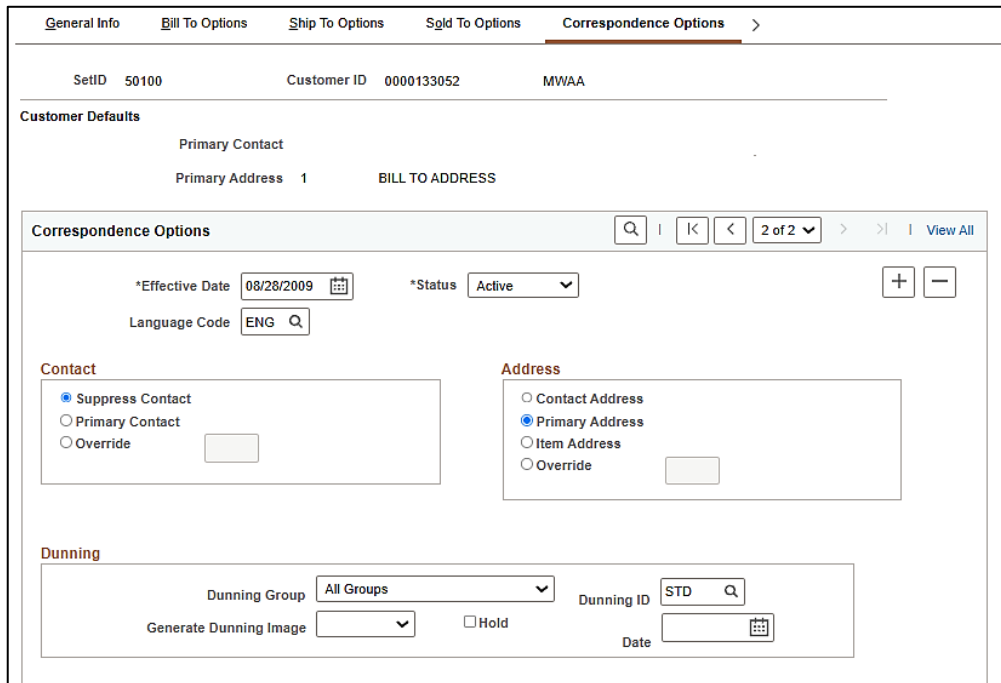
Accounts Receivable Job Aid

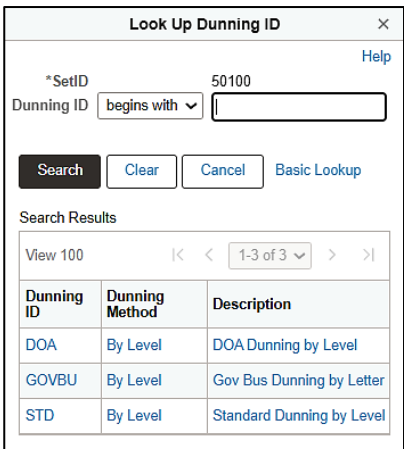
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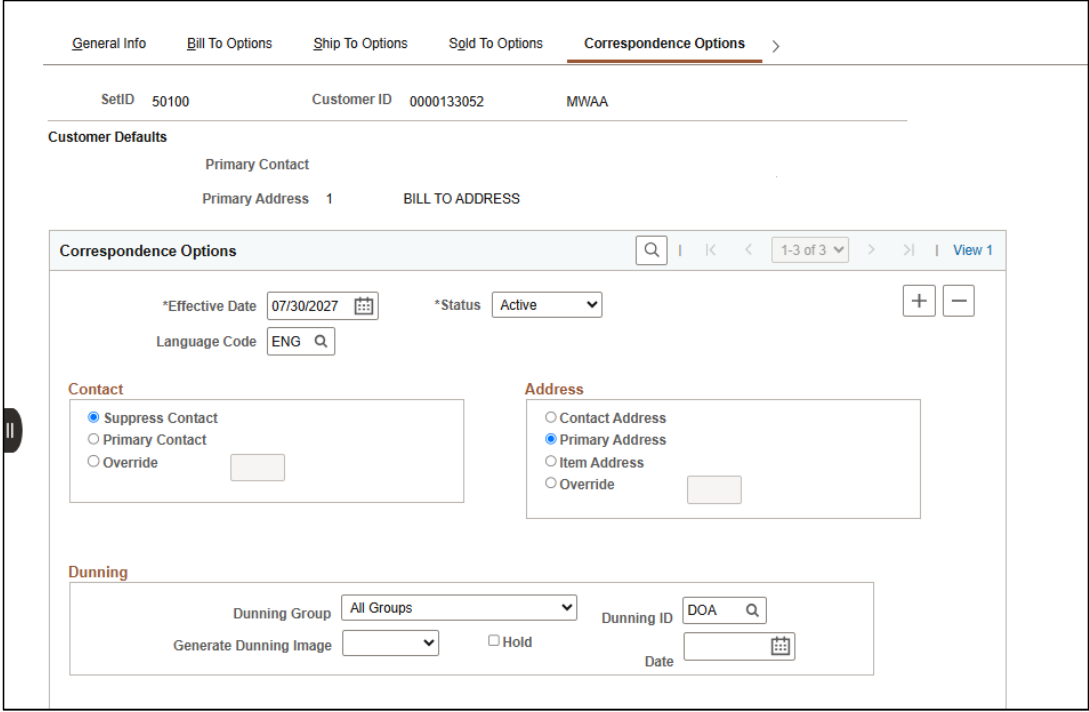
Step	Action
	The Correspondence Options tab displays. General InfoBill To OptionsShip To OptionsSold To OptionsCorrespondence Options > SetID 50100Customer ID 0000133052MWAA Customer Defaults Primary Contact Primary Address 1BILL TO ADDRESS Correspondence Options 08/28/2009ActiveENG Contact ☒ Suppress Contact ☐ Primary Contact ☐ Override Address ☐ Contact Address ☒ Primary Address ☐ Item Address ☐ Override Dunning Dunning GroupAll GroupsDunning IDSTD Generate Dunning ImageHoldDate Statements Statement GroupAll Statement GroupsStatement ID Generate Statement ImageHoldDate

Step	Action
7.	In the Dunning section, review the information. If the Dunning ID needs to be changed, click the Add a New Row icon. 

The **Correspondence Options** page displays.

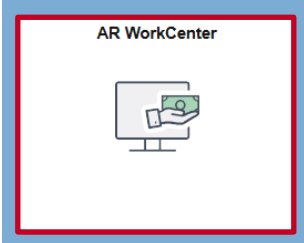
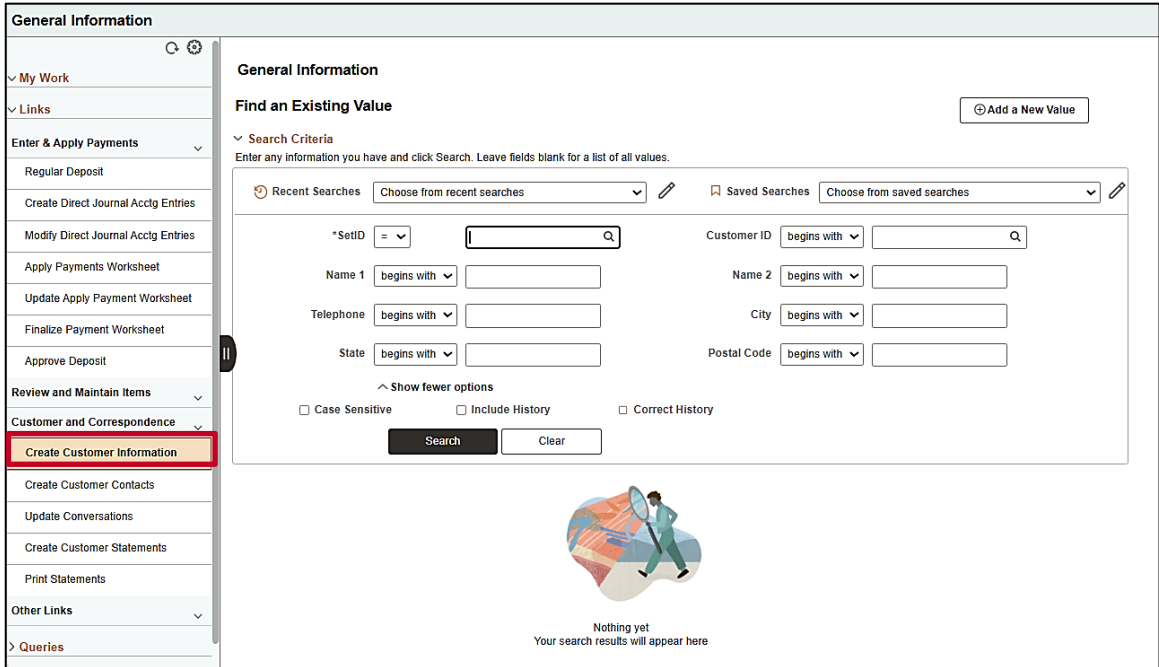


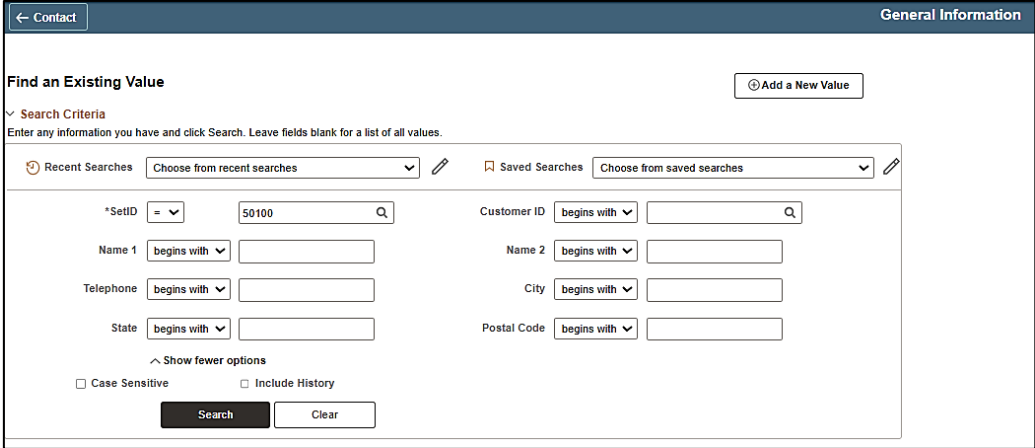
Step	Action
8.	Click the Dunning ID Lookup icon. 
9.	Select the appropriate Dunning ID from the list. 
	“DOA” should be used for dunning state Agencies. “STD” is used for individual customers. Federal customers are not typically set up to receive dunning notices.

Step	Action
	The Correspondence Options page displays with the updated Dunning ID. 
10.	Click the Save button once all the required changes are entered. 

Adding Attachments

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

Step	Action
1.	Navigate to the Create Customer Information page by clicking the AR WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning
2.	Use the following navigation path in the WorkCenter: Links > Customer and Correspondence > Create Customer Information Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
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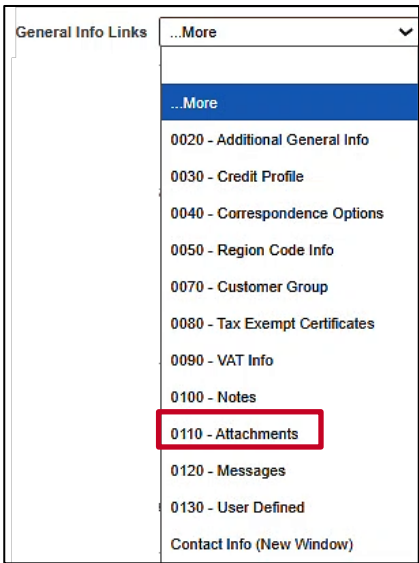
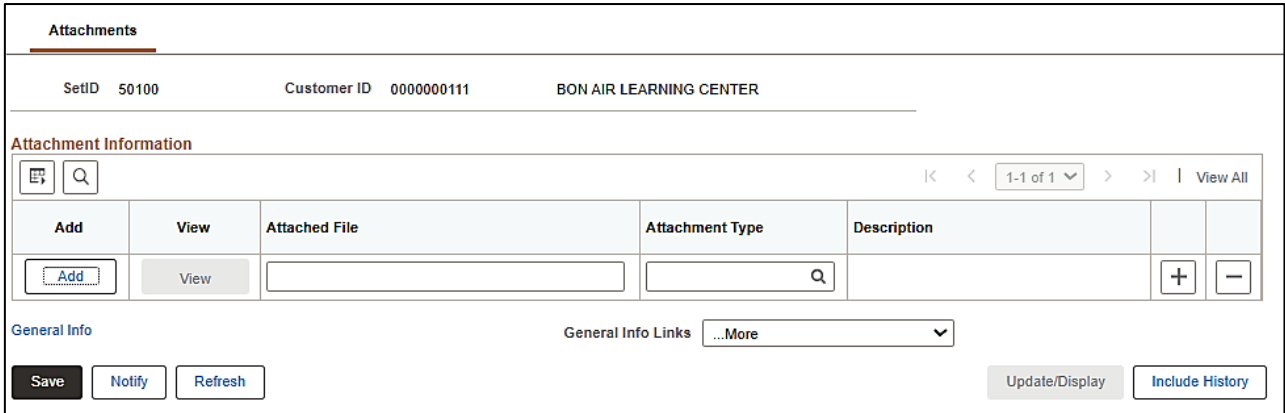
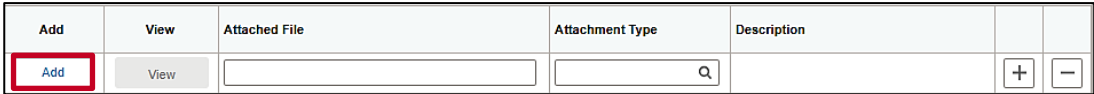
Step	Action
	The General Information Find an Existing Value Search page displays. 
	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled Overview of the Cardinal FIN Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.
3.	Click the SetID Look up icon and select the applicable Business Unit. 
4.	Click the Customer ID Look up icon and select the applicable Customer ID. 
5.	Click the Search button. 

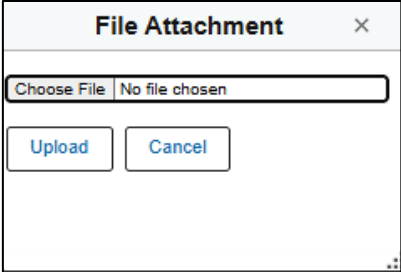
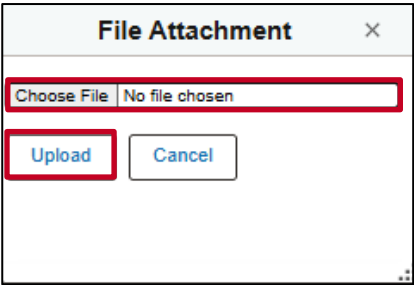
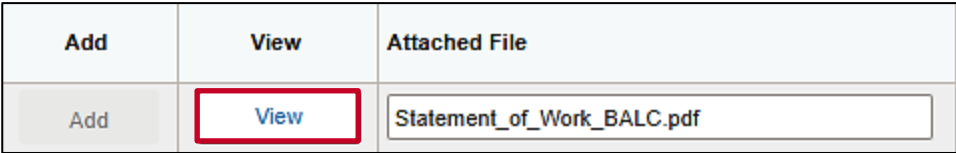


Accounts Receivable Job Aid

AR323 Creating and Maintaining Customers (VDOT Only)

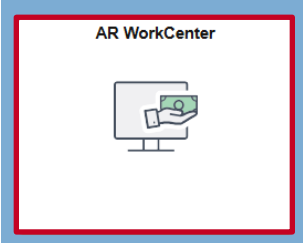
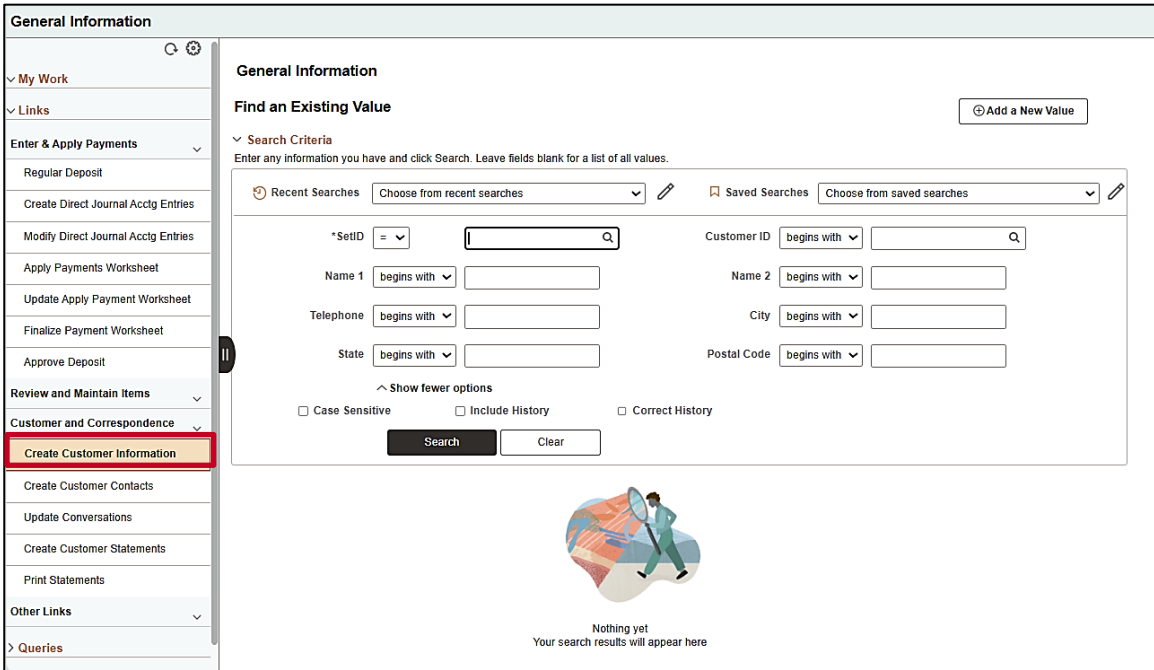
Step	Action
	The General Info tab displays. General InfoBill To OptionsShip To OptionsSold To OptionsMiscellaneous General Info SetID 50100Customer ID 0000000111General Info Links ...More *StatusInactiveInactive As Of 05/03/2016Level Regular *Date Added01/01/1900*Since01/01/1900 *TypeState Agency *Name1BON AIR LEARNING CENTER Name2ATTN: ACCOUNTS PAYABLE Email ID Currency CodeUSDRate TypeCRRNT *Short NameJUVENILE Roles ☒ Bill To Customer Bill To Selection ☒ Ship To Customer Ship To Selection ☒ Sold To Customer Sold To Selection ☐ Broker Customer ☐ Indirect Customer ☒ Correspondence Customer Correspondence Selection ☒ Remit From Customer Remit From Selection ☒ Corporate Customer Corporate Selection ☐ Consolidation Customer Consolidation Business Unit Federal Attributes ☐ Federal Customer Trading Partner Code Disbursing Office ☐ Appropriation Symbol Not Required for Reimbursable Agreements Contracts Options ☐ Hold Billing on Unpaid Cost

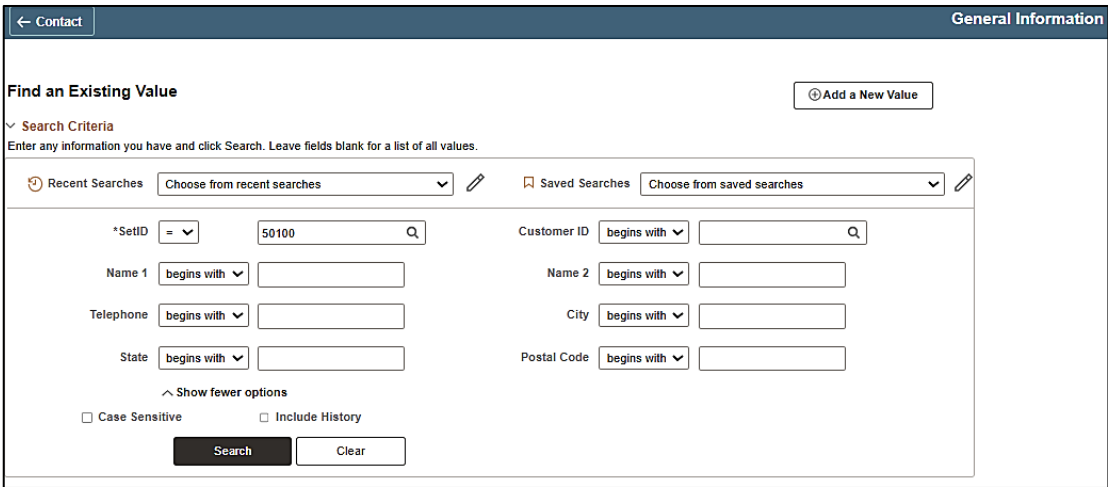
Step	Action
6.	Click the General Info Links dropdown button and select the "0110 – Attachments" list item. 
The Attachments tab displays. 	
7.	Click the Add button to locate, select, and upload the attachment. 

Step	Action
	The File Attachment page displays in a pop-up window. 
8.	Click the Choose File button to locate the file and then click the Upload button. 
9.	Click the View button to review the attachment. 
10.	Click the Save button. 

Adding Notes

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

Step	Action
1.	Navigate to the Create Customer Information page by clicking the AR WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning
2.	Use the following navigation path in the WorkCenter: Links > Customer and Correspondence > Create Customer Information Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Create Customer Information page using the following navigation path: NavBar > Menu > Customers > Customer Information > Create Customer Information

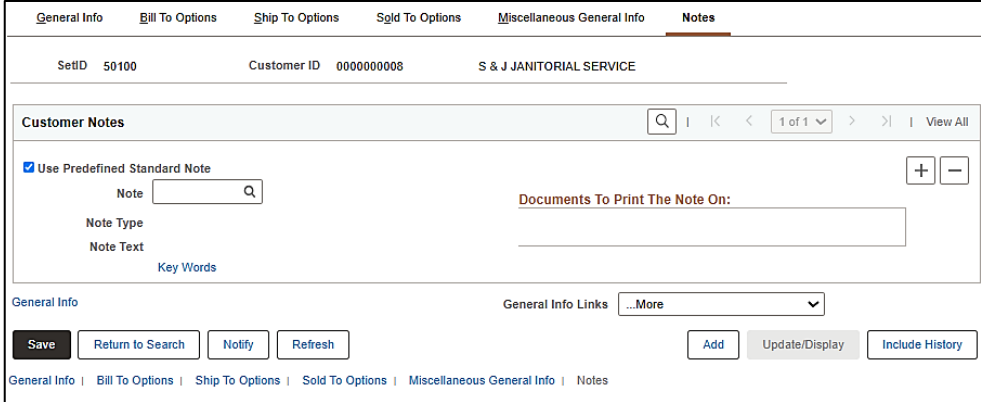
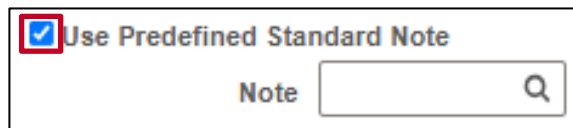
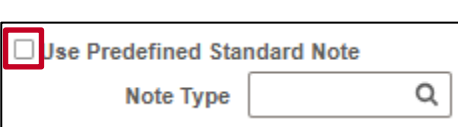
Step	Action
	The General Information Find an Existing Value Search page displays. 
	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled Overview of the Cardinal FIN Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.
3.	Click the SetID Look up icon and select the applicable Business Unit. 
4.	Click the Customer ID Look up icon and select the applicable Customer ID. 
5.	Click the Search button. 



Accounts Receivable Job Aid

AR323 Creating and Maintaining Customers (VDOT Only)

Step	Action
	The General Info tab displays. General InfoBill To OptionsShip To OptionsSold To OptionsMiscellaneous General Info SetID50100Customer ID0000000000General Info Links...More *StatusInactiveInactive As Of08/15/2017LevelRegular *Date Added12/08/2011*Since12/08/2011*TypeBusiness *Name1S & J JANITORIAL SERVICE*Short NameS & J JANI Name2ATTN: STAFFORD SPENCEREmail IDxxx@JANITORIAL@COMCAST.NET Currency CodeUSDRate TypeCRRNT Roles ☒ Bill To Customer ☒ Ship To Customer ☒ Sold To Customer ☐ Broker Customer ☐ Indirect Customer ☒ Correspondence Customer ☒ Remit From Customer ☒ Corporate Customer ☐ Consolidation Customer Consolidation Business Unit Federal Attributes ☐ Federal Customer Trading Partner Code Disbursing Office ☐ Appropriation Symbol Not Required for Reimbursable Agreements Contracts Options ☐ Hold Billing on Unpaid Cost
6.	Click the General Info Links dropdown button and select the “0100 – Notes” list item. 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 Notes tab displays. 
	The Use Predefined Standard Note checkbox option defaults as checked. This allows users to select a standard note. To create a customized note, skip to step 9. 
7.	Click the Note Look Up icon and select the applicable option. 
8.	Click the Save button. 
	The steps below are only used to create a customized note.
9.	Uncheck the Use Predefined Standard Note checkbox option to create a customized note. 



Accounts Receivable Job Aid

AR323 Creating and Maintaining Customers (VDOT Only)

Step	Action
	The Customer Notes page displays. Customer Notes ☐ Use Predefined Standard Note Note Type Note Text 254 characters remaining Key Words Documents To Print The Note On: ☐ Order Acknowledgment ☐ Advance Shipping Notification ☐ Bill of Lading ☐ Order Change Acknowledgement ☐ Buying Agreement Renewal ☐ Buying Agreement Status ☐ Invoice Courtesy Copy ☐ Invoice ☐ Invoice Notification ☐ Packing List ☐ Picking Plan ☐ Product Price List ☐ Quotation ☐ Return Material Authorization
10.	Click the Note Type Look Up icon and select the applicable Note Type. ☐ Use Predefined Standard Note Note Type
11.	Enter a free form note in the Note Text field (maximum of 254 characters). Note Text 254 characters remaining Key Words



Accounts Receivable Job Aid

AR323 Creating and Maintaining Customers (VDOT Only)

Step	Action																														
12.	Select the applicable Documents to Print the Note On checkbox option(s). <table><tr><th colspan="2">Documents To Print The Note On:</th></tr><tr><td>☐</td><td>Order Acknowledgment</td></tr><tr><td>☐</td><td>Advance Shipping Notification</td></tr><tr><td>☐</td><td>Bill of Lading</td></tr><tr><td>☐</td><td>Order Change Acknowledgement</td></tr><tr><td>☐</td><td>Buying Agreement Renewal</td></tr><tr><td>☐</td><td>Buying Agreement Status</td></tr><tr><td>☐</td><td>Invoice Courtesy Copy</td></tr><tr><td>☐</td><td>Invoice</td></tr><tr><td>☐</td><td>Invoice Notification</td></tr><tr><td>☐</td><td>Packing List</td></tr><tr><td>☐</td><td>Picking Plan</td></tr><tr><td>☐</td><td>Product Price List</td></tr><tr><td>☐</td><td>Quotation</td></tr><tr><td>☐</td><td>Return Material Authorization</td></tr></table>	Documents To Print The Note On:		☐	Order Acknowledgment	☐	Advance Shipping Notification	☐	Bill of Lading	☐	Order Change Acknowledgement	☐	Buying Agreement Renewal	☐	Buying Agreement Status	☐	Invoice Courtesy Copy	☐	Invoice	☐	Invoice Notification	☐	Packing List	☐	Picking Plan	☐	Product Price List	☐	Quotation	☐	Return Material Authorization
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☐	Packing List																														
☐	Picking Plan																														
☐	Product Price List																														
☐	Quotation																														
☐	Return Material Authorization																														
13.	Click the Save button. <table><tr><td>Save</td><td>Return to Search</td><td>Notify</td><td>Refresh</td></tr></table>	Save	Return to Search	Notify	Refresh																										
Save	Return to Search	Notify	Refresh																												