Non-Student Accounts Receivable
Customer Setup FAQs

Q: How do I know if a customer already exists in KFS-AR?

A: Use the Lookup button in the “Reference” section of the Accounts Receivable module to determine if the customer already exists. Always change the “Active Indicator” to “Both” so that inactive customers are also included in your search results.

- **Note:** Wildcards can be used in the search criteria. It is best to search for part of the individual’s or company’s name you are looking for so that more results are returned. Once the list of search results displays, you can click on the column titled “Customer Name” to sort the list by name.

Q: How do I edit or add a new address for a customer?

A: Perform a search for the customer number or look the customer up by using wildcards. This will return all of the addresses for that customer.
1. Click “edit” in the “Actions” column of the search results.
2. Follow these steps to edit the customer:
   a. Enter a description - “add address” or “edit address” is sufficient.
   b. Go to the “Addresses” tab, leave the address type as “Alternate”, enter the new customer address and click “add.”
      i. **Note:** if you want the name of the customer to appear in the first name last name format on the invoice, you will need to enter the name in that format under the “Addresses” tab when updating the address information.
   c. Submit the document to route to Non-Student Accounts Receivable for approval.

Q: How do I make an inactive customer active?

A: Once you have performed a search for the customer, click on the “edit” option under the “Actions” column of the search results. This will open the customer set-up screen.
   1. Enter a description – “to activate customer” is sufficient. Do not specify the customer is only for use by your department or organization.
   2. Under the “General Information” tab, you will see a blank box next to “Active Indicator.” Click the box to activate the customer.
   3. Submit the changes so it will route to Non-Student Accounts Receivable for approval.
Q: How do I add a new customer?

A: To create a new customer, click the “Create” button next to “Customer” in the “Reference” section of the Accounts Receivable module.

1. Enter a description – “new customer” is sufficient. Please do not specify the customer is only for use by your department or organization. All IU campuses share the same customer database, and duplicates should not be entered for department use only.

2. Be sure to follow the Business Rules for New Customers located on the Non-Student AR webpage under “Training Material for Billing Organizations.”

3. Enter all of the required information indicated with “*” next to the field. You must click “add” after entering the address information.
   a. If you want the customer name to appear in the first name last name format on the invoice (John Doe), you can enter it this way in the address section of the customer set-up.

4. Once you submit the edoc, it will route to Non-Student Accounts Receivable for approval.
Q: Will I be able to use the customer immediately after submitting my changes?

A: The customer must first be approved before you can add it to the invoice. It will not appear in any of the customer searches until the customer document is in "Final" status. Non-Student Accounts Receivable usually approves the customer documents in a timely manner but if you need it immediately, please contact nonstdar@iu.edu.

Q: Can I blanket approve my new customers or customer edits?

A: No. All Customer documents need to route to Non-Student Accounts Receivable for approval. Please call or email the Accounts Receivable contact person for your campus if you have any questions.

Q: Are the Business Naming Rules for customers posted on the web?

A: Yes, they can be found in the FAQs and Training section of the Non-Student Accounts Receivable Webpage.

Q: Is there a step-by-step guide to all Billing Organization functions on the web?

A: Yes, a Billing Organization User Guide can be found in the FAQs and Training section of the Non-Student Accounts Receivable Webpage. Additional training material can be found on the FMS website under the “Training” tab. Scroll down and select the drop-down list for Accounts Receivable. https://fms.iu.edu/training/kuali-financial-system/