Business Rules for Naming New Customers in KFS-AR

1. Names like “3M,” “JL Construction,” or “AFSCME” have no spaces, no commas etc.

2. An Individual’s name is listed as “Last name, First name” in the customer name because the first three characters of the customer number should be the first three characters of the last name. The name may be listed as “First name Last name” in the address section of the customer set-up so that it formatted correctly for invoices and mailing.

3. Do not use “The” at the beginning of a customer name.

4. Do not use titles in the first name, such as “Mr,” “Mrs,” “Dr” etc.

5. When titles are included in a name such as “Dr John L Doe,” it should be listed as “Doe, Dr John L;” “Jane K Deere, MD,” should be listed as “Deere MD, Jane K”

6. If a last name is hyphenated it should be entered that way in the customer set-up.

7. Do not use shift key characters.

8. Do not use punctuation or ampersands.

9. If the name of an abbreviation is known or can be found online, spell out the whole name (i.e. “Med Ctr” = Medical Center; “Hosp” = Hospital)

10. For military branches, the prefix “United States” is left off—simply list as “Army,” “Navy,” etc.

11. When the following are at the end of a name, they should be abbreviated: “Inc,” “Corp,” “Assoc,” “Co,” “Ltd”

12. When “City of Bloomington” is used, it should be listed as “Bloomington, City of”

13. “School of Music” should be listed as “Music, School of”

14. If it is necessary to abbreviate, do so at the end of the entry.
15. Spell out in full prefixes such as “Saint,” “Fort,” “Mount” etc.

16. Numbers in the customer name should be spelled out, from one to ten

17. For university departments, such as “Department of Athletics,” put “Athletics, Department of.” This is for universities other than IU. IU department should be billed through an internal billing document.

18. Commonly used acronyms such as “IBM;” “ABC” are not spelled out in full.

19. Dashes should be used in phone numbers.

20. Use contact’s name in the “Attention” line of the Invoice, not in the customer’s address.

   For additional questions regarding creating or naming new customers, please contact your Campus AR Contact or nonstdar@iu.edu.