SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

November 1, 2019

Search for a Billing/AR Customer

This guide covers how to search for a Billing/Accounts Receivable customer.

Step 1: Navigate to the General Information Search page and Enter Search Criteria

1. Navigate to the *General Information* search page. You are able to access the page from the Billing or Accounts Receivable modules.

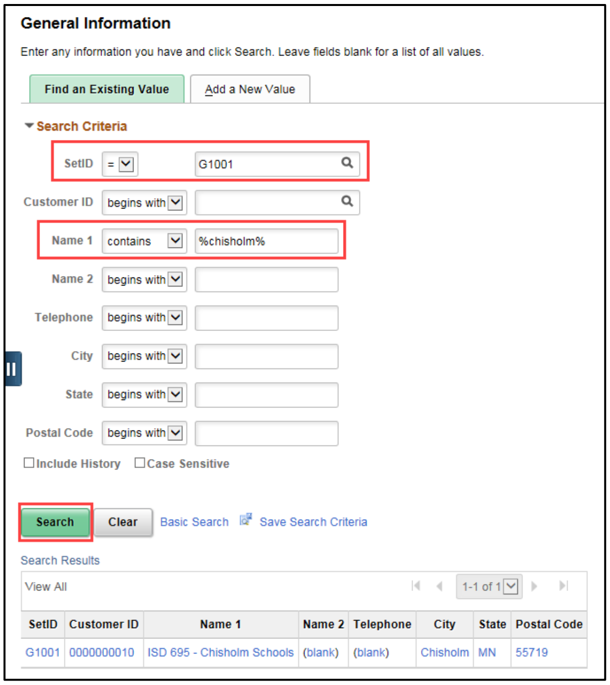
   - From the Billing Module:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Billing, Customer Contact. The General Information page will display by default.
WorkCenter	Accounting, Billing, Billing WorkCenter, left-menu, Links section, Customer & Contact Information, Customer General Information.

   - From the Accounts Receivable Module:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Accounts Receivable, Customer Interactions. The General Information page will display by default.
WorkCenter	Accounting, Accounts Receivable, Receivables WorkCenter, left-menu, Links section, Customer & Contacts, Customer General Information.

2. Click the **Find an Existing Value** tab.
3. You **must** enter your *SetID* field (usually the same as your *Business Unit*) or click on the **Lookup** icon and select a *SetID*. **Note: Do not use the default ("SHARE").**



4. Enter search criteria, such as the *Customer ID* or *Name 1*.
    - The percent sign (%) can be used to replace one or more characters.
    - The operators can be changed from “begins with” to “contains,” etc.
5. Click on the **Search button**. The *General Information* page displays. This tab contains all of the relevant information about the customer. Almost all changes to customer information will be made on this page.