

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").**

General Information

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

Find an Existing Value Add a New Value

▼ Search Criteria

SetID =

Customer ID begins with

Name 1 contains

Name 2 begins with

Telephone begins with

City begins with

State begins with

Postal Code begins with

Include History Case Sensitive

 Basic Search

Search Results

View All << 1-1 of 1 >>

SetID	Customer ID	Name 1	Name 2	Telephone	City	State	Postal Code
G1001	0000000010	ISD 695 - Chisholm Schools	(blank)	(blank)	Chisholm	MN	55719

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.

General Info Bill To Options Ship To Options Sgld To Options Miscellaneous General Info [New Window](#) | [Personalize Page](#)

SetID G1001 Customer ID 0000000012 General Info Links

*Status Level

*Date Added *Since *Type

*Name 1 *Short Name

Name 2

Currency Code Rate Type

Roles

Bill To Customer Correspondence Customer
[Bill To Selection](#) [Correspondence Selection](#)
 Work Customer Remit From Customer
[Ship To Selection](#) [Remit From Selection](#)
 Sold To Customer Corporate Customer
[Sold To Selection](#) [Corporate Selection](#)
 Broker Customer Consolidation Customer Consolidation Business Unit

Indirect Customer Grants Management Sponsor

Federal Attributes

Federal Customer Trading Partner Code Disbursing Office

Appropriation Symbol Not Required for Reimbursable Agreements