UNIVERSITY OF ALBERTA

Customer Setup and Update Request Form

External Commercial Billing

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Purpose: This form is used by University of Alberta (U of A) departments and faculties to create or modify external customer accounts in PeopleSoft. Accurate documentation of customer billing and tax information is required to ensure compliant invoicing and prevent processing delays.

Instructions: Download the PDF document and open it using Adobe Acrobat or Reader rather than a web browser. Enter information into all sections, ensuring the form is complete; incomplete or handwritten forms will be returned for correction. The document must be digitally signed using the formal sign-off fields provided. Once finished, save the digital file directly. Do not print or scan this form, as only the original version will be accepted.

Access the Service Portal and select the Submit a Finance form option from the Staff Services Catalog. Attach the completed form and any supporting documentation.

For assistance with this form, contact the Staff Service Centre.

Section A: Action (select one)

◉ Add New Customer ○ Add New Location ○ Update Existing Customer/Location ○ Reactivate Customer

Section B: Required Information

Fill out only the active fields.

Customer ID: (General Accounts Receivable - GAR)

Customer Legal Entity Name: ____________________

Customer Billing Currency: ○ CAD ○ USD

Address: ____________________

City: ____________________ Province/State: ____________________ Postal Code/Zip Code: ____________________

Country: ____________________ Customer Website: ____________________

Customer Contact Name: ____________________

Contact Title: ____________________ Phone: ____________________

Accounts Payable Phone Number: ____________________ Accounts Payable Email: ____________________

Approvals and Authorization

Only departments/faculties that have been approved by the College/Faculty General Managers & Associate Vice President/Strategic Initiative Officer can request the setup of a Billing Unit in PeopleSoft Accounts Receivable module.

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Name

____________________ ____________________

Title Department

____________________ ____________________

Signature Date (yyyy-mm-dd)

For Internal Use Only

Date Received: ____________________ (yyyy-mm-dd) Actioned By: ____________________

Checklist for Requestor

- ☐ For **Add New Customer/Location** requests, verified that the Customer or Location does not already exist in PeopleSoft.
- ☐ For **Add New Location** requests, confirmed that the new address does not replace an address of an existing location for the Customer.
- ☐ For **Update Existing Customer/Location** requests, verified that the correct Customer or Location, respectively, has been identified.
- ☐ For **Reactivate Customer** requests, verified that an active Customer or Location does not already exist in PeopleSoft.
- ☐ Verified with the Customer via a website, email, or other correspondence, that the information provided on this Form is accurate.
- ☐ Provided a website that supports the request.
- ☐ Completed all required fields on this Form.

How to use the form

Add New Customer Requests

- Before submitting a '**New Customer Setup**' request, run the **AAA_AR_CUSTOMER_SEARCH** query in PeopleSoft Financials to review active and inactive customers.
- When searching, use variations of the customer name, including acronyms, abbreviations, partial words (use wildcard format: % keyword%).
- Select the '**Add New Customer'** option only if the customer has never existed in PeopleSoft Financials and has never been billed through the U of A Billing module. In such cases, Shared Services - Billings and Collections will assign a new customer number.

Add New Location Requests

- Run the **AAA_AR_CUSTOMER_SEARCH** query in PeopleSoft Financials using the **Customer ID** to review all existing locations and inactive addresses before submitting a Location Request.
- Before selecting '**Add New Location**', confirm that the new address is **not replacing** an existing location (e.g., customer relocation).
- Select '**Add New Location'** in the form **only if** the customer requires multiple active locations**.**
- Location numbers will be assigned by Shared Services - Billings and Collections.

Update Existing Customer/Location Requests

- If a Customer has moved to a new address, select '**Update Existing Customer/Location**' in the form.
- Provide the **Customer Name** and/or **Location Number** to be updated.
- This ensures all billing and correspondence automatically reflect the updated address.

Reactivate Customer Requests

- Run the **AAA_AR_CUSTOMER_SEARCH** query in PeopleSoft Financials to review active and inactive customers before submitting a request.
- Select '**Reactivate Customer'** in the form **only if**:
    - the customer already exists in PeopleSoft Financials.
    - the customer is currently **inactive**.
    - there are **no other active GAR accounts**