

**INSTRUCTIONS:**

- Use this Form for New Customer or New Location or Update Existing or Reactivation (submit one form per requested action). Complete ALL sections on the first page of this Form (*Requested Action, Required Fields and Check List for Requestor*).
- Please review the information on the second page of this Form prior to submitting a request.
- **Please submit this Form as an editable document file (do not submit a scanned copy).** Once you've filled it out, submit it with any supporting documents to the [Staff Service Centre](#). **Subject Line:** *Customer Setup/Update Request* and the *Customer Name*
- Forms must be submitted by the Finance Partner or authorized approver as electronic approval.

**REQUESTED ACTION (check):** *(Numbers in brackets refer to the required fields in the section below) - Select One*

Add New Customer	Add New Location	Update Existing Customer/Location	Reactivate Customer
<input type="checkbox"/> (2, 3, 5-13)	<input type="checkbox"/> (1, 2, 5-13)	<input type="checkbox"/> (1-13) Includes Name Changes	<input type="checkbox"/> (1, 2, 5-13)

**REQUIRED FIELDS:**

<b>1. Customer ID (GAR only)</b>			
<b>2. Customer Full Legal Name</b> <small>(40 Character Max)</small>			
<b>3. Customer Billing Currency</b> <input type="checkbox"/> CAD <input type="checkbox"/> USD <input type="checkbox"/> Other (Please Specify) <small>Select One</small>			
<b>4. Location Number</b>			
<b>5. Address:</b>			
<b>6. City</b>	<b>7. Province/State</b>	<b>8. Postal/Zip Code</b>	<b>9. Country</b>
<b>10. Customer Website</b>		<b>11. Customer Contact Name, Title and Phone</b> <small>(include area code)</small>	
<b>12. Accounts Payable Phone</b> <small>(include area code)</small>		<b>13. Accounts Payable Email</b> <small>(for statement purposes) *Will be returned if field is left blank</small>	
<b>Requested By:</b>			
<b>Requesting Billing Unit</b> Faculty	<b>Print Name</b>	<b>Date</b>	<b>Phone</b> <small>(include area code)</small>

**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.

**INFORMATION ABOUT FORM****New Customer Requests**

- Run query **AAA\_AR\_CUSTOMER\_SEARCH** in PeopleSoft Financials to review active and inactive Customers before submitting requests for New Customers Set Up.
- Search for less common words, acronyms, abbreviations of a word, or parts of a word (surrounded by the wildcard %) based on the Customer Name.
- Check the *Add New Customer* option in the **Requested Action** section on the first page of this Form only if the customer has never existed in PeopleSoft Financials, nor ever billed by the university through the Billing module. Accounts Receivable will assign the customer number.

**New Location Requests**

- Run query **AAA\_AR\_CUSTOMER\_SEARCH** in PeopleSoft Financials by Customer ID to review the current locations and inactive addresses for all locations, respectively, before submitting Location Request.
- Before selecting the *Add New Location* option for an existing Customer, confirm that the new address does not replace the address for an existing location in PeopleSoft Financials. i.e.: Customer has moved from one address to a new address.
- Check the *Add New Location* option in the **Requested Action** section on the first page of this Form only if there are to be multiple locations for the customer. Accounts Receivable will assign the location number.

**Update Existing Requests**

- If the Customer has moved, check the *Update Existing Customer/Location* option in the **Requested Action** section on the first page of this Form and provide the Customer number and/or Location number to be updated. The *Update Existing Location* option will ensure that the address on all billings and correspondence for the Customer updates automatically.

**Reactivate Requests**

- Run query **AAA\_AR\_CUSTOMER\_SEARCH** in PeopleSoft Financials to review active and inactive Customers before submitting requests for New Customers.
- Check the *Reactivate Customer* option in the **Requested Action** section on the first page of this Form if the Customer exists in PeopleSoft Financials, there are no other active GAR accounts, and has an Inactive status.