



**Office of the Controller
Miscellaneous Accounts Receivable
Creating a New Customer**

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I. Create a New Customer

To create a new customer in PeopleSoft Finance, use the navigation:

Main Menu > Customers > Customer Information > Create Customer Information

Step 1: Click the **Add a New Value** button. The SetID will always be MSCAR.

General Information

Find an Existing Value ⊕ Add a New Value

▼ Search Criteria

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

Recent Searches: Choose from recent searches *SetID = MSCAR Q

Saved Searches: Choose from saved searches

Customer ID: begins with Customer ID Q

Name 1: begins with Name 1 Q

Name 2: begins with Name 2 Q

Customer Status: = Customer Status Q

Step 2: From the next screen, click the **Add** button.

General Information

Add a New Value Q Find an Existing Value

*SetID: MSCAR Q

*Customer ID: NEXT Q

Add

Step 3: Under the **General Info** tab enter the name of the customer in the **Name 1** field. The **Name 2** field can be used to enter an additional name for the customer.

Step 4: In **Roles** section, be sure to check the Bill To Customer, Ship To Customer, Sold To boxes. The Correspondance Customer, Remit From Customer, and Corporate Customer boxes should auto populate.

Step 5: In **Support Teams** section, the **Default** box should be auto checked.

Team Code	Default	Description
USCSP	☒	USCSP Support Team

Step 6: In the **Address Locations**, add the street address in the **Description** field for **Location 1**. Check boxes (6 total) for Bill To, Ship To, Sold To and 3 Primary boxes.

Step 7: In the **Address Details** section, duplicate the street address in **Address 1** field, (can copy from **Description** box above) as well as the **City**, **State**, and **Postal Code**.

The screenshot shows the 'Address Details' section of a web application. The form contains the following fields and values:

- *Effective Date:** 11/06/2025
- *Status:** Active
- Language Code:** English
- Country:** USA (United States)
- Address 1:** 1000 Main Street
- Address 2:** (empty)
- Address 3:** (empty)
- City:** Columbia
- County:** (empty)
- State:** SC
- Postal:** 29205
- *In City Limit:** (checkbox, unchecked)

At the bottom of the form, there are buttons for **Save**, **Notify**, and **Refresh**. The **Save** button is highlighted with a red box. To the right of these buttons are links for **Add**, **Update/Display**, **Include History**, and **Correct History**.

Step 8: Click the **Save** button to assign a customer ID.

This screenshot is identical to the one above, showing the 'Address Details' section. The **Save** button at the bottom left is highlighted with a red box, indicating the next step in the process.

Step 9: Once saved, a Customer ID is assigned. The customer **Status** will be **Inactive** until the submission is approved and activated by the Controller's Office. An email will be sent to the Controller's Office stating that a customer was created and is awaiting approval.

The screenshot shows the 'Create Customer Information' form in the University of South Carolina system. The 'General Info' tab is selected. The 'SetID' is MSCAR and the 'Customer ID' is CST0000616. The '*Status' dropdown is set to 'Inactive' and is highlighted with a red box. Other fields include '*Date Added' (11/06/2025), '*Since' (01/01/1901), 'Level' (Regular), '*Type' (User 1), '*Name 1' (Maggie Todd), '*Short Name' (Maggie Tod), 'Name 2' (empty), 'Currency Code' (USD), and 'Rate Type' (CRRNT). The 'Inactive As Of' date is 11/06/2025.

Step 10: Once approved by the Controller's Office, the status will reflect as **Active** and an email will be sent to the user confirming activation for billing.

The screenshot shows the same 'Create Customer Information' form, but the '*Status' dropdown is now set to 'Active' and is highlighted with a red box. All other fields remain the same as in Step 9: SetID MSCAR, Customer ID CST0000616, *Date Added 11/06/2025, *Since 01/01/1901, Level Regular, *Type User 1, *Name 1 Maggie Todd, *Short Name Maggie Tod, Name 2 empty, Currency Code USD, and Rate Type CRRNT.

II. Create a Customer Contact

NOTE: A customer contact must be added to a customer before they can be invoiced.

To create a customer contact in PeopleSoft Finance, use the navigation:

Main Menu > Customers > Create Customer Contacts

Step 1: Click the **Add a New Value** button. The SetID will always be MSCAR.

Navigation: Favorites | Main Menu > Customers > Create Customer Contacts

Search: All Search Advanced Search

Worklist | Home | Sign Out

University of South Carolina

Add To | Notifications | NavBar

New Window | Help

Contact Info

Find an Existing Value

+ Add a New Value

▼ Search Criteria

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

Recent Searches: Choose from recent searches

Saved Searches: Choose from saved searches

*SetID = MSCAR

Contact ID begins with

Contact Name begins with

Customer SetID begins with

Customer ID begins with

Step 2: Click the **Add** button.

Navigation: Favorites | Main Menu > Customers > Create Customer Contacts

Search: All Search Advanced Search

Worklist | Home | Sign Out

University of South Carolina

Add To | Notifications | NavBar

New Window | Help

Contact Info

Add a New Value

Find an Existing Value

*SetID MSCAR

*Contact ID NEXT

Add

Step 3: On the **Contact Information** page in the Contact Information section, enter the contact's name in the **Name** field and carefully enter the contact's email address in the **Email Address** field to ensure the invoice is successfully received.

Step 4: Click the **Contact Customers** link at the bottom left of the page.

University of South Carolina FUAT

Worklist Home Sign Out

Add To Notifications NavBar

New Window Help Personalize Page

Contact Information

Maintain Contacts

SetID MSCAR Contact ID NEXT

Contact Information

*Effective Date 11/06/2025 *Status Active

*Name Maggie Todd

Title

*Email Address mgtodd@mailbox.sc.edu

Salutation Code

Salutation

Language Code English

Person ID

Contact Customers Contact Phone and Type

Save Notify Add Update/Display Include History Correct History

Step 5: In the **Contact Customer** section, click the **Customer ID Lookup** button, which looks like the magnifying glass icon.

University of South Carolina FUAT

Worklist Home Sign Out

Add To Notifications NavBar

New Window Help Personalize Page

Contact Information

Contact Customers

Contact SetID MSCAR Contact ID NEXT

Contact Information

Effective Date 11/06/2025 Name Maggie Todd

Link Contact to Customer

Customer Self Service Security

*Customer SetID	*Customer ID	Customer Name	*Location	Primary Bill To	Primary Ship To	Primary Sold To		
MSCAR							+	-

Contact Information

Contact Phone and Type

Save Notify Add Update/Display Include History Correct History

Step 6: Enter the Customer ID number in the **Customer ID** field.

Step 7: Click the **Search** button.

Step 8: Click the **Customer ID or Name 1** hyperlink. This will populate the Customer ID field in the Link to Contact to Customer section of the page.

Look Up Customer ID

Customer SetID: MSCAR

Customer ID: begins with CST0000152

Name 1: begins with

Search Clear Cancel Basic Lookup

Search Results

View 100 1-1 of 1

Customer ID	Name 1
CST0000152	Carowinds

Step 9: Click the **Location Lookup** button and select the correct **Location** for the contact. This will populate the Location field in the Link Contact to Customer section of the page.

Look Up Location

Customer SetID: MSCAR

Customer ID: CST0000152

Description: begins with

Search Clear Cancel Basic Lookup

Search Results

View 100 1-1 of 1

Address Sequence Number	Description
1	PO Box 410289

Step 10: Click the **Save** button.

University of South Carolina

Worklist Home Sign Out

Add To Notifications NavBar

New Window Help Personalize Page

Contact Information

Contact Customers

Contact SetID MSCAR Contact ID NEXT

Effective Date 11/06/2025 Name Maggie Todd

Link Contact to Customer

Customer Self Service Security

*Customer SetID	*Customer ID	Customer Name	*Location		Primary Bill To	Primary Ship To	Primary Sold To		
MSCAR	CST0000152	Carowinds	1	PO Box 410289	☒	☒	☒	+	-

Contact Information

Contact Phone and Type

Save Notify Add Update/Display Include History Correct History

Step 11: Click the **Contact Phone and Type** link at the bottom left of the page.

University of South Carolina

Worklist Home Sign Out

Add To Notifications NavBar

New Window Help Personalize Page

Contact Information

Contact Customers

Contact SetID MSCAR Contact ID NEXT

Effective Date 11/06/2025 Name Maggie Todd

Link Contact to Customer

Customer Self Service Security

*Customer SetID	*Customer ID	Customer Name	*Location		Primary Bill To	Primary Ship To	Primary Sold To		
MSCAR	CST0000152	Carowinds	1	PO Box 410289	☒	☒	☒	+	-

Contact Information

Contact Phone and Type

Save Notify Add Update/Display Include History Correct History

Step 12: On this page, click the **Phone Type Lookup** button and select the appropriate type from the list.

The screenshot shows the 'Look Up Phone Type' dialog box open over the 'Contact Phone Information' section of the 'Create Customer Contacts' page. The dialog lists the following options:

BUSN	Business Phone
CAMP	Campus Phone
CELL	Cellular Phone
DORM	Dormitory Phone
FAX	FAX
HOME	Home Phone
MAIN	Main
OTR	Other
PGR1	Pager 1
PGR2	Pager 2
TELX	Telex
Cancel	

The background form shows the 'Contact Phone Information' section with fields for *Phone Type, Area Code, and Phone Number. The *Phone Type field is currently empty, and the Area Code and Phone Number fields are also empty.

Step 13: Enter the **Area Code** and **Phone Number** in the appropriate fields.

Step 14: Click the **Save** button.

The screenshot shows the 'Contact Information' page with the 'Contact Phone Information' section populated. The 'BUSN' phone type is selected, and the 'Area Code' is '803' and the 'Phone Number' is '777-3421'. The 'Save' button is highlighted in the bottom left corner.

*Phone Type	Area Code	Phone Number	Extension	Primary Phone
BUSN	803	777-3421		☐