



Creating and Maintaining Customers Overview

Creating a customer is the first step in the Billing Module of the Accounts Receivable functional area. Information entered for a customer is used in the Billing Module, the Accounts Receivable module, and the Project Accounting functional area. Before creating a new customer, the user must check to see if the customer is already established in Cardinal.

Cardinal stores all the information needed for a customer. Customer profiles allow users to manage customer information. The data stored in customer information can contain names, addresses, contact information, payment terms, and other billing information.

Customer information is used to bill individuals and businesses for damage to state property (i.e., guard rails, signs, equipment, etc.) and Federal and State Agencies.

From time to time, the user may need to update customer information. In Cardinal, users can update the customer's Type and other general information using the same **General Information** page used to initially enter the customer.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

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AR323_Creating and Maintaining Customers (VDOT Only)

Revision History

Revision Date	Summary of Changes
8/15/2024	Baseline.



Verify the Customer Does Not Already Exist

This step is required before creating a customer to prevent duplication.

Step	Action		
1.	1. Navigate to the General Information page using the following path:		
	Main Menu > Customers > Customer Information > General Information		
The Gene	ral Information Find an Existing Value Search page displays.		
General	Information		
Find	an Existing Value		
Sea Enter	rch Criteria any information you have and click Search. Leave fields blank for a list of all values.		
E E	Recent Searches Choose from recent searches		
	*SetiD = v Q Customer ID begins with v Q		
	Name 1 begins with v Name 2 begins with v		
	Telephone begins with v		
	State begins with v		
	∧ Show fewer options		
	Case Sensitive Include History Correct History		
•	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled		
	"Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning		
2.	The SetID field defaults to the Agency's Business Unit. If not, select the applicable Business Unit using the SetID Look Up icon.		
3.	Enter the Customer name in the Name 1 field.		
	Name 1 begins with X		
A	If unsure of the Customer name, change the search criteria to "Contains" and search for part		
	of the name. Search criteria can be added using a combination of additional fields such as Telephone . City . State . and/or Postal Code .		



Step	Action				
4.	Click the Search button.				
	Search Clear Save Search				
	If the customer's name that was entered does not match an existing customer, the message "No matching values were found" displays.				
1	 Search Results No matching values were found. 				
	If the customer exists, a customer does not need to be created since they are already in the system.				
5.	If the customer does not exist, proceed to the next section of this Job Aid titled Entering a <u>New Customer</u> .				



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Entering a New Customer

Step	Action				
1.	Navigate to the General Information page using the following path:				
	Main Menu > Customers > Customer Information > General Information				
The Gene	ral Information Find an Existing Value Search page displays.				
Gene	ral Information				
Fii E	nd an Existing Value Search Criteria Inter any information you have and click Search. Leave fields blank for a list of all values.				
	PRecent Searches Choose from recent searches V				
	"SetD = 50100 Q Customer ID begins with v Name 1 begins with v Name 2 begins with v Telephone begins with v City begins with v City begins with v State begins with v Postal Code begins with v Correct History Correct History Search Clear				
i	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .				
2.	Click the Add a New Value button.				
The Add a	New Value page displays.				
General Ir	formation				
Add a	New Value				
*Cust	*SetID 50100 Q omer ID NEXT Q Add				



Step	Action				
3.	The SetID field defaults based on the Agency Business Unit. If this is not correct, select the applicable SetID using the SetID Look Up icon.				
	*SetID 50100 Q *Customer ID NEXT Add				
4.	The Customer ID field defaults to "NEXT". Do not change.				
	*SetID 50100 Q *Customer ID NEXT Q Add				
i	When the required customer information has been entered and saved, Cardinal updates "NEXT" to the next available sequential Customer ID Number.				
5.	Click the Add button.				
	*SetID 50100 *Customer ID NEXT Add				
The Gener	al Info page displays.				
	General Info Bill To Options Splip To Options Sgld To Options Miscellaneous General Info SetID 50100 Customer ID NEXT General Info Links More *Status Active Copy From Customer Level Regular				
	*Date Added 05/29/2024 ii *Since 05/29/2024 ii *Type Individual Name 1 Alt Name 1 *Short Name Alt Name 2				
	Email ID Currency Code Q Rate Type Q				
	Roles Bill To Customer Bill To Selection Ship To Customer Remit From Customer Ship To Selection Sold To Customer Sold To Selection Broker Customer Corporate Selection Indirect Customer Consolidation Customer Consolidation Customer Federal Attributes				
	Federal Customer Trading Partner Code Disbursing Office Appropriation Symbol Not Required for Reimbursable Agreements				



Step	Action			
6.	The Status field defaults to "Active" and should not be changed.			
	*Status Active			
7.	The Date Added and Since fields default to the current date. Use the Date Added and Since Calendar Icons to change to the applicable date as needed. *Date Added 05/29/2024 3 *Since 05/29/2024			
8.	The Level field defaults to "Regular" and should not be changed.			
9.	Select the applicable Customer Type using the Type dropdown menu ("Business", "Government", "Individual", or "State Agency").			
10.	Enter the name of the customer in the Name 1 field. The Short Name field populates using the first 10 characters of the Name 1 field.			
	*Name 1 *Short Name			
i	The Name 2 field can be used for additional information as needed. Name 2			
11.	Click the Currency Code Look Up icon and select "USD".			
12.	Click the Rate Type Look Up icon and select the rate type of "CRRNT". Rate Type			



Step	Action					
13.	In the Roles section, select the applicable checkbox options (Bill to Customer , Ship to Customer , and Sold to Customer).					
	Roles					
	Bill To Customer Bill To Selection					
	Ship To Customer					
	Sold To Customer Sold To Selection					
	Broker Customer					
	Indirect Customer					

Screenshot of the bottom section of the General Info page:

Federal Customer		Trading Partner Code		Disbursing Office	
Appropriation Symbol Not	Required for Reimbur	sable Agreements			
Contracts Options					
Hold Billing on Unpaid Cos	st				
Support Teams			Personalize Fi	ind View All 🔄 🔣 🛛 First 🕚 1	of 1 🛞 Last
Team Code	Default	Description			
্					+ -
Address Locations				Find View All First 🕚 1	of 1 🛞 Last
					+ -
*Location	1		Primary	Broker Primary	
Description		Ship To	Primary	□ Indirect □ Primary	
•				Correspondence Address	
		RFID Enabled	VAT Default	VAT Service Treatment Setup	
Address Details				Find View All First 🕚 1 of	1 Last
*Effective Date	05/29/2024		* Stat	Active	+ -
Tax Code	03/23/2024		Language Co	de English	
Physical Nature	•	~	Where Perform	ed 🔽	
Alternate Name 1			Alternate Name	e 2	
Country	USA Q United Stat	tes			
Address 1					
Address 2				View Phone Information	
eVA VLIN					
eVA Address ID					
City					
County		Posta			
	Q				



Step	Action
14.	Select the Federal Customer checkbox option if "Government" was selected as the Customer Type. A Trading Partner Code is required if the Federal Customer checkbox option is selected. Federal Attributes Federal Customer Trading Partner Code Appropriation Symbol Not Required for Reimbursable Agreements
i	The Hold Billing on Unpaid Cost checkbox option defaults from the Contracts – Installation Options page. The checkbox is grayed out on this page and cannot be updated. The value indicated here will default on the new contract that is created from the Project Accounting Module. Contracts Options Hold Billing on Unpaid Cost
15.	Click the Team Code Look Up icon and select the applicable Team Code that corresponds to the Customer Type and then select the Default checkbox option.
	Team Code Default Description Image: Code Image: Code Image: Code
16.	Select the applicable address location checkbox options (Bill To , Ship To , and Sold To). Select the Primary checkbox option for each one selected.
	Description Ship To Primary Sold To Primary



Step	Action
17.	Enter the customer address information in the Address Details section.
	Address Details Find View All First (1 of 1 () Last *Effective Date 05/29/2024 *Status Active (*) Tax Code Language Code English Physical Nature View Performed Alternate Name 1 Alternate Name 2 Country USA United States Address 1 View Phone Information eVA Address ID In City Limit
18.	Click the Bill To Options link at the bottom of the page or scroll to the top of the page and click the Bill To Options tab.



Step	Action					
The Bill To Options page displays.						
	General Info Bill To Options Spip To Options Sold To Options Miscellaneous General Info SetID 50100 Customer ID NEXT Ann D LLC					
-	Customer Bill To Options	Find View All First 🕢 1 of 1 🕟 Last				
	*Effective Date 05/29/2024	*Status Active 🗸 🛨 🖃				
	Currency Code USD	Rate lype CRRNT				
	Credit Analyst Q AR Specialist Q Billing Specialist Q	Collector Q Bill Inquiry Phone Q Billing Authority Q				
	Billing Options	Billing Consolidation Data				
	Direct Invoicing Federal Highway File Prompt for Billing Currency Electronic Invoice *Freight Bill Type Shipping	Consolidation Key				
		Blanket PO Number				
		Start Date				
	Bill By Identifier	Order Management Options				
	Hold Number of Days	Purchase Order Required Disable Prices on Receipt				
19.	Click the Credit Analyst Look Up icon and	d select the applicable Credit Analyst.				
20.	Click the Collector Look Up icon and sele entering the customer information is the Co	ect the applicable Collector (typically, the p ollector).	erson			
	Collector					
21.	Click the General Info tab.					
	General Info Bill To Options So	ld To Options Miscellaneous General Info				
	SetID 50100 Customer ID NEX	Ann D LLC				
	Customer Bill To Options					
	*Effective Date 05/29/2024	D				
	Currency Code USD					



Step	Action						
The Gene	ne General Info page redisplays.						
[General Info Bill To Options Sold To Options Miscellaneous General Info						
	SetID 50100 Customer ID NEXT General Info LinksMore 🗸						
	*Status Active Copy From Customer Level Regular *Date Added 05/29/2024 3 *Since 05/29/2024 3 *Type Business *Name 1 Ann D LLC Alt Name 1 *Short Name Ann D LLC Name 2 Alt Name 2 Alt						
22.	Click the General Info Links dropdown menu (i.e., More). The General Info Links dropdown contains additional customer data options.						
	More 0020 - Additional General Info 0030 - Credit Profile 0040 - Correspondence Options 0050 - Region Code Info 0070 - Customer Group 0080 - Tax Exempt Certificates 0090 - VAT Info 0110 - Notes 0110 - Attachments 0120 - Messages 0130 - User Defined Contact Info (New Window)						



Step	Action
	Only a few users (Collection Specialists and Post Production Support (PPS) users) will have access to the Additional General Info page from the General Info Links dropdown menu. The Additional General Info page contains sensitive data like Social Security Number, Individual Tax ID, etc. The Standard ID Qualifier field is used to enter a Standard ID type.
1	Alternate Customer Information Personalize Find View All 2 First (1 of 1) Last SettD Standard ID Qualifier ID Number ID Personalize Find View All 2 First (1 of 1) Last SIC Codes Adoption Taxpayer ID Electronic Address ID Personalize Find View All 2 First (1 of 1) Last SIC Type Employer ID Number Individual Taxpayer ID Description Other Social Security Number General Info W8 Identification Number Image: Notify Image: Description Image: Notify Image: Description
23.	Select Contract Info (New Window) from the General Info Links dropdown menu to enter customer contact information.



Step Action	
The Contact Info Find an Existing Value Search page displays in a new window.	
Contact Info	7
Find an Existing Value	
Enter any information you have and click Search. Leave fields blank for a list of all values.	_
Recent Searches Choose from recent searches V 🖉 Saved Searches Choose from saved searches V	Ø
*SetID = v Q Contact ID begins with v Q Contact Name begins with v Q Customer SetID begins with v Q Customer ID begins with v Q Customer Name begins with v Q	
Case Sensitive Include History Correct History Search Clear	
24. Click the Add a New Value button.	
The Contact Info Add a New Value page displays.	
Contact Info Add a New Value	
*SetID 50100 Q *Contact ID NEXT Q Add	
25. The SetID defaults based on Agency Business Unit. If it does not, use the SetID Look icon to select the applicable SetID.	Up
*SetID 50100	
26. The Contact ID field should display "NEXT". Do not change. *Contact ID NEXT	



Step	Action					
27.	Click the Add button.					
	Add					
The Main	tain Contacts page of	displays.				
	Contact Information					
	Maintain Contacts					
	SetID 50100	Contact ID NEXT				
	Contact Information	Find View All First ④ 1 of 1 ② Last				
	*Effective Dat	ate 05/30/2024 🛐 *Status Active 🗸 🛨				
	*Nam	*Contact Flag External Contact				
	Email Addres					
	Salutation Cod	ode Q				
	Salutatio	ion				
	*Preferred Communicatio					
	Person I					
	Contact Customers	Contact Phone and Type				
	User Profile					
	Image: Save Image: Notify Image: Save Image					
	In the Contact Info	ormation section, some contact information is required.				
	Required fields are	e:				
	- Effective Da	ate (defaults to the current date)				
	- Name					
	- Status (defa	aults to Active)				
A	- Contact Fla	ag (defaults to External Contact)				
	Optional fields are:	c.				
	- Title, Email	l ID				
	- Salutation (Code				
	- Salutation					
	- Preferred C	Communication				
	- Language (Code				
28.	The Effective Date Calendar icon.	e defaults to the current date. Update as needed using the Effective	e Date			
	*Effective Dat	te 05/29/2024				



Step	Action		
29.	Enter the name of the contact in Name field.		
	*Name		
30.	The Preferred Communication field defaults to "Call". Select the applicable option using the Preferred Communication dropdown button as needed.		
	*Preferred Communication Call		
31.	The Status field should default to "Active". If it does not, select the "Active" option using the Status dropdown button. *Status Active		
32.	The Contact Flag field should default to "External Contact". If it does not, use the Contact Flag dropdown button to select "External Contact".		
33.	Click the Contact Phone and Type link at the bottom of the page. Contact Phone and Type		



Step	Action					
The Conta If "Call" or	Contact Phone and Type page displays. Call" or "Fax" was selected as the Preferred Communication, this page is required.					
	Contact Information Contact Phone and Type					
	SetID 50100 Contact ID NEXT Contact Information Find View All First () 1 of 1 () Last					
	Effective Date 05/29/2024 Name Ann DeNeen Contact Phone Information Personalize Find View All Image: The second					
	*Phone Type International Prefix Phone Number Extension Primary Phone					
	Contact Type Personalize Find View All 🖓 🔐 First 🕢 1 of 1 🕟					
	Information Last Contact Type Description					
	Contact Information Contact Customers User Profile					
34.	Select the phone type using the Phone Type Look Up icon. Enter the Phone Number, including any Extension information, in the corresponding fields. If multiple phone numbers are entered, be sure to use the Primary Phone checkbox option to identify one as preferred.					
35.	Click the Contact Customers link at the bottom of the page to link this contact to the new customer.					
	Contact Information Contact Customers User Profile					



Step	Action								
The Contact Customers page displays.									
Contact I Contac	Contact Information Contact Customers								
Contact	Contact SetID 50100 Contact ID NEXT Contact Information Find View All							Last	
Link C	Effective Date 05/29/20	24 Name Ann De	Neen		P	ersonalize Fir	nd 🕗 🔜	First 🕢 1 of 1 🕟 La	ast
Custon	mer Self Service Security	Customer Name	L	Condition Condition	Deservertetler	Primary Bill	Primary Ship	Delman Cold To	
SetID 50100				Credit Cards	Documentation	To			
Contact Inf Contact Ph	ormation one and Type	User Profile							
36.	 36. Select the Customer ID using the Customer ID Look Up icon. Once the Customer ID is selected, the Customer Name field populates. *Customer ID 						ID is		
1	If more than one customer shares the same contact, another Customer can be added by clicking the Add a New Row (+) icon to add another row. Primary Bill Primary Ship Primary Sold To Image: Description of the image of the i					ed by			
37.	Select the location using the Location Look Up icon.								
The Location field is populated along with the Primary Bill To, Primary Primary Sold To checkbox options.			Ship To, a	and					
	Location		Credit Cards	Documentation	n Prima T	ry Bill Prir o	nary Ship To	Primary Sold To	
	1QF	FINGERPRINTING	Credit Cards	Documentatio	n			✓	



Step	Action			
38.	Click the Save button when the Contact Customers information is complete.			
	Contact Information Contact Phone and Type User Profile			
	Save Notify			
	Once information is saved, Cardinal updates the Contact ID field in the Header section with the next available sequential number.			
	Contact SetID 50100 Contact ID 259			



Setting Up Customer Correspondence Options

The Correspondence Options allows users to select the information used on Invoices and other communications with customers.

Step	Action
1.	Navigate to the General Information page using the following path:
	Main Menu > Customers > Customer Information > General Information
The Gene	ral Information Find an Existing Value Search page displays.
Gene	ral Information
Fin T	nd an Existing Value Search Criteria Inter any information you have and click Search. Leave fields blank for a list of all values.
	PRecent Searches Choose from recent searches V & Saved Searches Choose from saved searches V
	*SetID = ▼ 50100 Customer ID begins with ▼ Name 1 begins with ▼ Name 2 begins with ▼ Telephone begins with ▼ City begins with ▼ City begins with ▼ State begins with ▼ Postal Code begins with ▼ ▲ Show fewer options Case Sensitive Include History Search Clear
i	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .
2.	The SetID defaults based on the Agency Business Unit. If it does not, select the applicable SetID using the SetID Look Up icon. *SetID =
3.	Enter or select the Customer's ID using the Customer ID Look Up icon.
4.	Click the Search button.



Cardinal Accounts Receivable Job Aid

Step	Action					
The Gene	The General Info page displays.					
	General Info Bill To Options Sold To Options Miscellaneous General Info					
	SetiD 50100 Customer ID 0000167446	General Info Links (More 🗸				
	*Status Active *Date Added 05/29/2024 iii *Since 05/29/2024 *Name 1 Ann D LLC Name 2 Email ID addg@zhotmail.com Currency Code USD Rate Type CRRNT Roles Bill To Customer Bill To Customer Bill To Selection Ship To Customer Ship To Selection Ship To Selection Ship To Selection Broker Customer Sold To Selection Broker Customer Federal Attributes Sederat Customer Tading Partner Co	Level Regular				
	Appropriation Symbol Not Required for Reimbursable Agreements Contracts Options Hold Billing on Unpaid Cost					
5.	Click the General Info Links dropdown	button and select "Correspondence Options".				
ĺ	The General Into links dropdown menu of Correspondence Options , Notes , and	on the General Into tab has links to Attachments.				



Ste	p	Action				
The Correspondence Options page displays.						
ſ	Gene	eral Info Bill To Options Sold To Options Correspondence Options Miscellaneous General Info				
		SetID 50100 Customer ID 0000167446 Ann D LLC				
	Custo	omer Defaults Primary Contact 1 Ann DeNeen LLC				
		Primary Address 1				
	Corr	respondence Options Find View All First 🕢 1 of 1 🕟 Last				
		*Effective Date 05/29/2024 *Status Active V				
		Language Code ENG Q				
	Co	ontact Address				
		Suppress Contact O Contact Address				
		O Primary Contact				
		○ Override				
	Du	unning				
		Dunning Group All Groups V Dunning ID				
		Generate Dunning Image Hold Date				
6.		Click the Add a New Row (+) icon in the Correspondence Options section.				
		Correspondence Options Find View All First (1 of 1 (2) Last				
		*Effective Date 05/29/2024 *Status Active V				
		Contact Address				
1		Suppress Contact O Contact Address				
		O Primary Contact Override Description Descri				
		O Override				
		Dunning				
I		Dunning Group All Groups V Dunning ID				
l		Generate Dunning Image Hold Date				



Ste	р	Action				
A new	A new row is created in the Correspondence Options section.					
	Corre	espondence Options	Find View All First 🕢 1 of 2 🕑 Last			
		*Effective Date 05/30/2024 *Status Ac	tive 🗸 🕨			
		Language Code ENG Q				
	Co	ntact	Address			
		Suppress Contact	○ Contact Address			
		Primary Contact	Primary Address Item Address			
		ovenide	Override			
	Du	nning				
		Dunning Group All Groups	V Dunning ID			
		Generate Dunning Image	Hold Date			
l						
7.		Enter or select the Dunning ID using the Dunning ID Look Up icon.				
		Dunning Group All Groups	V Dunning ID			
		Generate Dunning Image Hold Date				
G	"DOA" should be used for the dunning state Agencies. "STD" is used for individual					
J			pically set up to receive durining notices.			
8.		Click the Save button once all of the required changes are entered.				
		Return to Search	C Refresh			



Adding Attachments

Attachments can be used to enter additional information about the customer.

Step	Action			
1.	Navigate to the General Information page using the following path: Main Menu > Customers > Customer Information > General Information			
The Gene	ral Information Find an Existing Value Search page displays.			
General Find ▼ Sea Ente	I Information an Existing Value arch Criteria r any information you have and click Search. Leave fields blank for a list of all values.			
ť	Recent Searches Choose from recent searches 🗸 🖉 Saved Searches Choose from saved searches 🗸 🖉			
	"SetID = Customer ID begins with Name 1 begins with Name 2 begins with Name 2 begins with Telephone begins with City begins with State begins with Postal Code begins with Postal Code begins with Case Sensitive Include History Search Clear			
1	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .			
2.	The SetID should default based on the Agency Business Unit. If it does not, select the applicable SetID using the SetID Look Up icon. *SetID =			
3.	Enter or select the Customer's ID using the Customer ID Look Up icon.			
4.	Click the Search button.			



Cardinal Accounts Receivable Job Aid

Step	Action		
The General Info page displays.			
	General Info Bill To Options Sold To Options Miscellaneous General Info		
	SetiD 50100 Customer ID 0000167446 General Info LinksMore		
	*Status Active		
	Roles		
	Bill To Customer Correspondence Ustomer Bill To Selection Correspondence Selection Ship To Selection Remit From Customer Ship To Selection Remit From Selection Sold To Customer Corporate Customer Sold To Customer Sol00 (000000007)		
	Sold To Selection Corporate Selection Broker Customer Consolidation Customer Consolidation Business Unit		
	Indirect Customer		
	Federal Attributes		
	Federal Customer Trading Partner Code Disbursing Office Appropriation Symbol Not Required for Reimbursable Agreements		
	Contracts Options Hold Billing on Unpaid Cost		
5. Click the General Info Links dropdown button and select "0110 – Attachments".			
	SetiD 50100 Customer ID 0000167446 General Info Links		
	*Status Active More *Date Added 05/29/2024 is 0020 - Additional General Info *Date Added 05/29/2024 is 0030 - Credit Profile *Name 1 Ann D LLC Alt Name 1 Name 2 0050 - Region Code Info Alt Name 1 0070 - Customer Group 0080 - Tax Exempt Certificates 0090 - VAT Info Currency Code USD Q Rate Type CRRNT Q Roles 0110 - Attachments 0120 - Messages 0130 - User Defined		
	Bill To Customer Correspondence Customer Bill To Selection Correspondence Selection		



Step	Action		
The Atta	ichments page displays.		
[Attachments		
	SetID 50100 Customer ID 0000167446 Ann D LLC		
	Attachment Information Personalize Find View All 🔁 🔢 First 🕢 1 of 1 🕢 Last		
	Add View Attached File Attachment Type Description		
	Add View		
	General Info LinksMore		
	Save Notify 2 Refresh Display Include History Correct History		
6.	6. Click the Add button to locate, select, and upload the attachment.		
	Add View Attached File Attachment Type Description		
	Add View Q		
The File	Attachment page displays in a pop-up window.		
	File Attachment		
	Choose File No file chosen		
	Upload Cancel		
7.	7. Click the Choose File button to locate the file and then click the Upload button.		
	File Attachment		
	Choose File Security Issues tes (Macro).docx		
	Upload Cancel		



Step	Action		
8.	Click the View button to review the attachment.		
	Attachment Information		
	Add View Attached File		
	Add View Security_Issues_when_opening_templates_		
9.	Click the Save button to save the attachment.		
	General Info		



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Adding Notes

Notes can be used to enter additional information about a customer.

Step	Action		
1.	Navigate to the General Information page using the following path:		
	Main Menu > Customers > Customer Information > General Information		
The G	eneral Information Find an Existing Value Search page displays.		
	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.		
	Precent Searches Choose from recent searches Image: Choose from saved searches		
	*SetID = Customer ID begins with Name 1 begins with Name 2 begins with Name 2 begins with Telephone begins with City begins with State begins with Postal Code begins with Postal Code begins with Case Sensitive Include History Cear		
i	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled "Overview of the Cardinal FIN Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .		
2.	The SetID should default based on the Agency Business Unit. If it does not, select the applicable SetID using the SetID Look Up icon. *SetID = •		
3.	Enter or select the Customer's ID using the Customer ID Look Up icon.		
4.	Click the Search button.		



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Step	Action			
The General Info page displays.				
	General Info Bill To Options Sold To Options Miscellaneous General Info			
	SetID 50100 Customer ID 0000167446 General Info LinksMore ✓			
	*Status Active Level Regular *Date Added 05/29/2024 *Since 05/29/2024 *Name 1 Ann D LLC Name 2 Alt Name 1 Att Name 2 Alt Name 2 Email ID addg@zhotmail.com Att Name 2 Currency Code USD Q Rate Type CRRNT			
	Roles			
	Image: Ship To Customer Image: Correspondence Customer Bill To Selection Correspondence Selection Image: Ship To Customer Remit From Customer Ship To Selection Remit From Selection Image: Sold To Customer Corporate Customer Sold To Selection Corporate Customer Sold To Selection Corporate Selection Image: Broker Customer Consolidation Customer Consolidation Customer Consolidation Business Unit			
	Federal Attributes			
	Federal Customer Trading Partner Code Disbursing Office Appropriation Symbol Not Required for Reimbursable Agreements			
	Contracts Options Hold Billing on Unpaid Cost			
5. Click the General Info Links dropdown button and select "0100 – Notes".				
	SetID 50100 Customer ID 0000167446 General Info Links			
	*Status Active More *Date Added 05/29/2024 iii *Name 1 Ann D LLC Name 2 Alt Name 1 Alt Name 2 Alt Name 2 Currency Code USD Rate Type CRRNT Oto - Notes OTO - Natactimiterins Oto - Natactimiterins Oto - Notes Oto - Natactimiterins			
	Roles 0130 - User Defined Contact Info (New Window)			
	Bill To Customer Correspondence Customer Bill To Selection Correspondence Selection			



Step	Action		
The N	The Notes page displays.		
	General Info Bill To Options Sold To Options Miscellaneous General Info Notes		
	SetID 50100 Customer ID 0000167446 Ann D LLC		
	Customer Notes Find View All First 🕢 1 of 1 🕟 Last		
	Use Predefined Standard Note		
	NoteQ		
	Note Text		
	Key Words		
	General Info Links More		
6.	The Use Predefined Standard Note checkbox option defaults as checked. This allows users to select a standard note. To create a customized note, skip to step 9.		
	Note		
7.	Select the applicable option using the Note Look Up icon.		
	Note		
8.	Click the Save button.		
	Refresh		
9.	To create a customized note, uncheck the Use Predefined Standard Note checkbox option.		
	Use Predefined Standard Note Note		



Cardinal Accounts Receivable Job Aid

Step	Action		
The Cu	stomer Notes page displays.		
	Customer Notes		Find View All First ④ 1 of 1 🚯 Last
	Use Predefined Standard Note		+ -
	Note TypeQ Doc	cuments To	Order Asknowledgement
	Note Text		
			Advance Shipping Notification
	1.		Bill of Lading
	254 characters remaining Key Words		Order Change Acknowledgement
			Buying Agreement Renewal
			Buying Agreement Status
			Invoice Courtesy Copy
			Invoice
			Invoice Notification
			Packing List
			Picking Plan
			Product Price List
			Quotation
			Return Material Authorization
			Return Material Autorization
10.	Select the Note Type using the Note Type Look Up in	con.	
	Customer Notes		
	Use Predefined Standard Note		
	Note Type		
11.	Enter a free form note in the Note Text field. This field	d holds	up to 254 characters.
	Note Text		[7] //
	254 characters remaining		
	Key Words		



Step	Action		
12.	Select the applicable Documents to Print the Note On checkbox option(s).		
	Documents To	o Print The Note On:	
		Order Acknowledgment	
		Advance Shipping Notification	
		Bill of Lading	
		Order Change Acknowledgement	
		Buying Agreement Renewal	
		Buying Agreement Status	
		Invoice Courtesy Copy	
		Invoice	
		Invoice Notification	
		Packing List	
		Picking Plan	
		Product Price List	
		Quotation	
		Return Material Authorization	
13.	Click the Sa	we button to save the note.	
	Save		€ Refresh