

Request New Customer Record

After verifying an existing customer record does not exist, gather the required information for the customer to request a new customer record in the Enterprise Financial System (EFS).

UM Maintain Customer Request Page

Log in to MyU (myu.umn.edu). Navigate to: **Key Links > PeopleSoft > EFS/Finance**

Navigate in EFS: **Customers > Customer Information > UM Maintain Customer Request**

1. Click <Create New Customer>.

The screenshot shows the 'UM Maint Cust List' page. It features a 'Customer Search' section with a text input field and a search icon. Below the search field, there are two instructional boxes. The left box states: 'If customer is not found, clear the search box above and click the 'Create New Customer' button'. It contains a blue link labeled 'Create New Customer'. The right box states: 'If the customer is found, click the 'View Customer Info' to review the address and contact information'. It contains a button labeled 'View Customer Info'. At the bottom of the page, there are two buttons: 'View Current Requests' (grey) and 'View Previous Requests' (orange).

2. Enter *Name* of the customer.
3. Enter *Website URL* for the customer. The best practice is to include the full website address.
4. Click <Next>.

The screenshot shows the 'UM Maint Cust Rqst' page. It displays a table with the following information:

SetID	UMFIN	Requester	DALEY008	Approver ID	
Seq Nbr	116002		Devonne Daley		
Status	Initiated	Create Datetime	07/21/2022 3:03:50PM	Approved Datetime	

Below the table is the 'Customer Information' section. It contains the following fields:

- Customer ID: NEXT
- Name: BLUE EARTH AGENCY
- Short Name: (empty field)
- Website URL: HTTPS://BLUEEARTHAGENCY.COM
- Grants Management Sponsor: ☐

At the bottom right of the 'Customer Information' section are two buttons: 'Cancel' and 'Next'.

5. Enter *Address Information* as applicable.

- *Department Name, Suite/Apt, Mail Code/Building Name/Floor #, Street Address/PO Box, City, State, Postal Code, Cust Phone, and Fax.*

6. Click <Next>.

UM Maint Cust Rqst				
SetID	UMFIN	Requester	DALEY008	Approver ID
Seq Nbr	116002		Devonne Daley	
Status	Initiated	Create Datetime	07/21/2022 3:03:50PM	Approved Datetime
Address Information				
Address Seq	Country	USA	County	Cancel Next
Department Name				
Suite/Apt		Mail Code/Building Name/Floor #		
Street Address/PO Box	4545 GREEN ROAD			
City	SAGINAW	State	MN	Postal Code 55779
Cust Phone	218-678-8798	Fax	218-345-8765	

7. Enter *Contact Information* as applicable.

- *Contact Name, Title, Email ID, Business Phone, Cell Phone, Home Phone, and Fax.* Email addresses are strongly recommended. For a new customer, either an email address OR a phone number is required.

Note: If an email address is provided, the *Email Invoice* checkbox will be checked. Invoices will be emailed to the customer. If not checked, invoices will be printed and mailed.

8. Click <Next>.

UM Maint Cust Rqst				
SetID	UMFIN	Requester	DALEY008	Approver ID
Seq Nbr	116002		Devonne Daley	
Status	Initiated	Create Datetime	07/21/2022 3:03:50PM	Approved Datetime
Contact Information				
Contact ID	Contact Seq			Cancel Next
Contact Name	SAM BERG	Title	MANAGER	
Email ID	BERG@BLUEEARTH.COM	Business Phone	218-999-9999	
Email Invoice:	☒ If checked, invoices will be emailed for this contact			
Cell Phone	218-393-9999	Home Phone	Fax	

9. Click <Add Comments>, if applicable, to add comments related to the customer setup. **Note:** Added comments will be saved with the date and time, and linked to the Internet ID of the commentator.
10. In the *Attachments* section, click <Add>, if applicable, to add attachments related to the customer. EFS only accepts the following file types: PDF, Word, Excel. Examples of attachments include:
 - **CEFT** Electronic Fund Transfer Info
 - **CMISC** Miscellaneous
 - **CPO** Purchase Order
 - **CST3** Certificate of Exemption

UM Maint Cust Rqst

SetID UMFIN Requester DALEY008 Approver ID
 Seq Nbr 116002 Devonne Daley
 Status Initiated Create Datetime 07/21/2022 3:03:50PM Approved Datetime

Customer Information

Customer ID NEXT Name BLUE EARTH AGENCY Short Name
 Website URL HTTPS://BLUEEARTHAGENCY.COM ☐ Grants Management Sponsor

Address Information

Address Seq Country USA County
 Department Name
 Suite/Apt Mail Code/Building Name/Floor #
 Street Address/PO Box 4545 GREEN ROAD
 City SAGINAW State MN Postal Code 55779
 Cust Phone 218-678-8798 Fax 218/345-8765

Contact Information

Contact ID NEXT Contact Seq
 Contact Name SAM BERG Title MANAGER
 Email ID BERG@BLUEEARTH.COM Business Phone 218-999-9999
 Email Invoice: ☒ If checked, invoices will be emailed for this contact
 Cell Phone 218-393-9999 Home Phone Fax

[Add Comments](#)

Comments

User ID DALEY008 Entered 07/21/22 3:07:20.000000PM

[Upload Attachment](#)

Attachments

Unique Sys Filename	Attached File	Attachment Type	Add	View
1			Add	View

Customer Cross Reference

Cross Reference Customer: ☐ Source System Source System ID

[▶ Current Customer Cross Reference Information](#)

[Save](#) [Save and Submit](#) [Cancel](#)

11. Review the information for accuracy.

12. Click <Save>, <Save and Submit>, or <Cancel> as appropriate.

- **Save:** If additional updates are required, click <Save>. Updates will be saved but will not be submitted to Accounts Receivable Services (ARS) for approval. Click <Return to List>.
- **Save and Submit:** Click <Save and Submit> to submit the request to Accounts Receivable Services (ARS) for approval.
- **Cancel:** Click <Cancel> to delete the request. Click <OK>.

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