Maintaining Customer Records

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Steps for Maintaining Customer Records

References

- ORC Section 126: OFFICE OF BUDGET AND MANAGEMENT

Process

When the agency receives new or changed information concerning an existing customer (i.e., an additional address) the information in OAKS FIN must be updated to reflect the change. OAKS keeps separate records for customers and contacts and allows the user to identify how they should be linked.

A customer can have multiple contacts and a contact (e.g. payment processor) can represent multiple customers. The process for maintaining accurate customer information and customer contact information in OAKS FIN is shown below.

There are two processes for updating customer information for accuracy in OAKS FIN.

What would you like to do?

- Maintain Customer Records
- Maintain Customer Contacts

Maintaining Customer Records

Overview

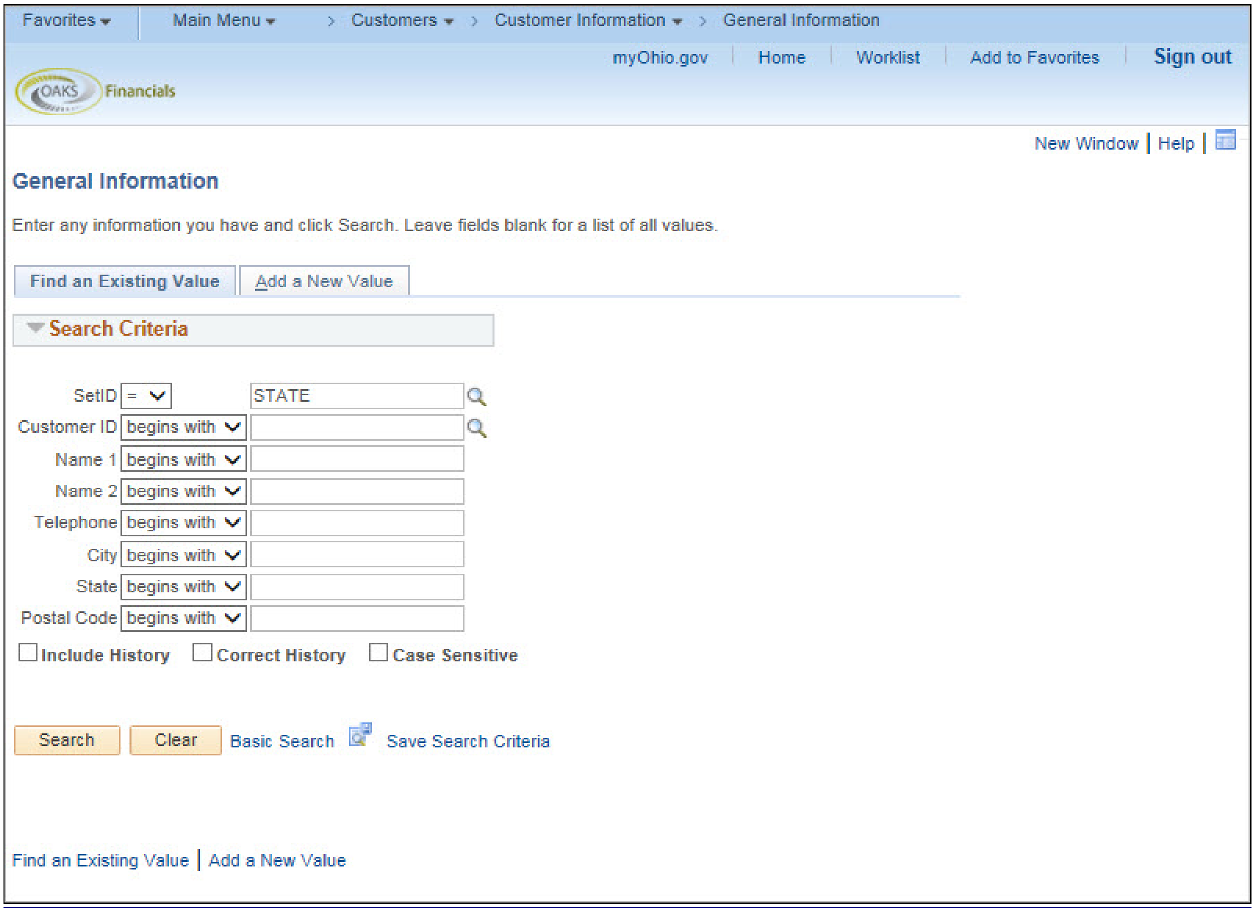
When the agency receives additional or changed information from an existing customer (i.e., an additional address) the information in OAKS FIN must be updated to reflect the detail of the change. The process for maintaining accurate customer information in OAKS FIN is shown below.

OAKS FIN allows a **one-to-many** relationship to exist between customer IDs and address location codes. There may be one customer (Customer ID) but the agency is able to add multiple addresses (Locations) to the customer.

If the customer is an agency of the state of Ohio (created by State Accounting for each agency) an Origin Code must be assigned to each customer location. That code will determine how the item is routed for review and approval.

Steps

- **OAKS FIN > Customers > Customer Information > General Information**



Update Customer Information

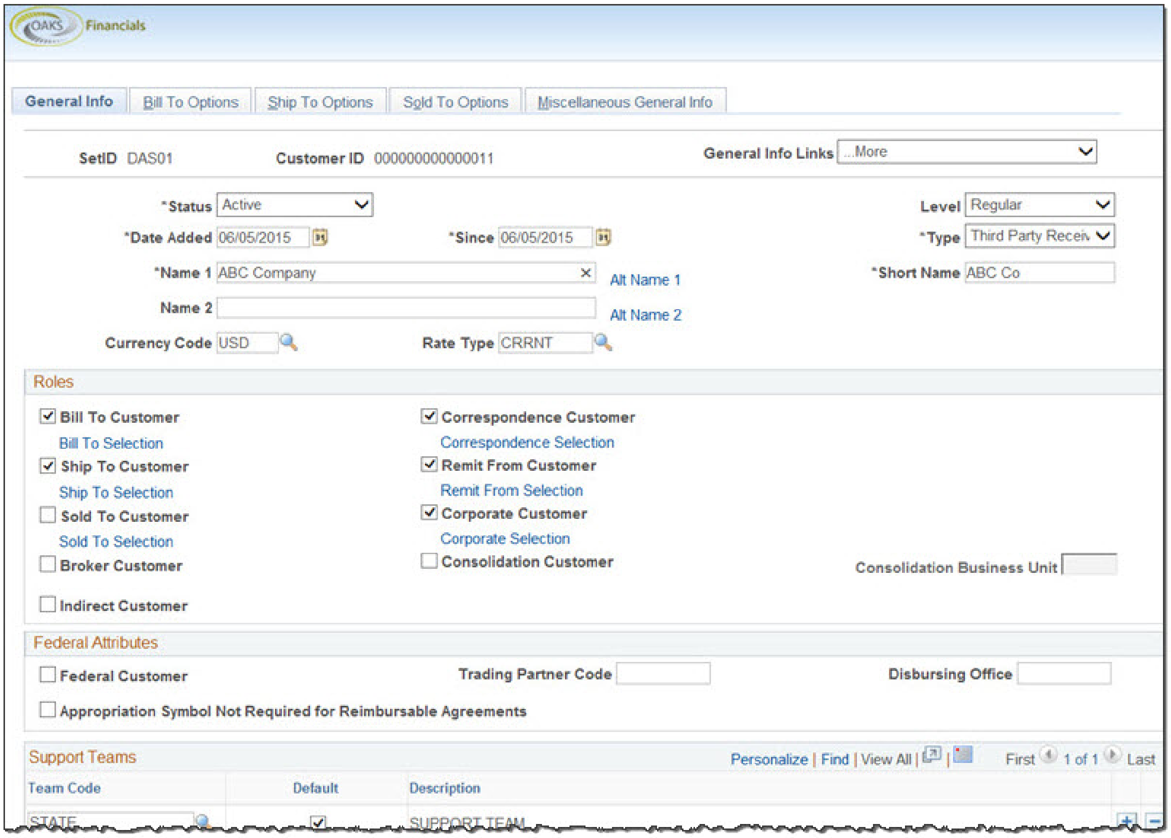
1. Click the **Find an Existing Value** tab.
2. Verify the selling agency's business unit is displayed in the **SetID** field.
3. Enter as much search criteria as necessary to find the customer.

- The **Customer ID** (buying agency or external customer ID) is best to enter. If not known, use the **Look up Customer ID** tool.

4. Click **Search**.

- After conducting a search, click the **Recent Search Results** icon at the end of the breadcrumb navigation anytime to display the **Recent Search Results** in a pop-up window.

- The Customer record will display.



- Customers with **multiple locations** will have multiple entries.

5. Select the appropriate **location** in the **Address Locations** section.

6. Make changes as necessary.
7. Click here to watch a quick tutorial on adding a speedchart to a customer record.

To add an additional address location:

a. Click the **Add a new row** icon in the **Address Locations** section.
b. Include a **Description** to make it easier to distinguish between locations.
c. Determine if the address location should be marked as the **Bill To** address and/or **Sold To** address and if it is the **Primary** address for that function.

d. Set the **Effective Date** – this is the date on which the new address becomes effective.

- Defaults to the current date.

e. Click on the **Physical Nature** dropdown list and select whether the selling agency is providing "Goods" or "Services."

f. Click on the **Where Performed** dropdown list and select an appropriate option for where the goods are shipped or the services performed.

g. When the customer is another state of Ohio agency, use the look up tool to find the **AP Origin** code provided by the buying agency for this address.

- The AP Origin code determines how the voucher will be routed for approval.
- An AP Origin code is required for customers that are state agencies.
- This field does not apply to customers other than state agencies.

h. Enter an **AP Speedchart** only if provided by the buying state agency for recurring charges.

i. Enter information into the fields for the physical **address.**

- **Country** must be entered prior to populating the remaining address lines.

  - Click here to watch a quick tutorial on creating a new customer location.

To change address location information:

a. Click the **Correct History** button.

- The **Correct History** button is used to make changes to existing information and places the record in "correction mode."
- The button will turn grey to indicate that correction mode is activated.
- If the **Correct History** button is not clicked before changes are made, then, when the save button is clicked, a message appears indicating the correction mode has not be selected and the changes will not be saved.

b. Select the appropriate address **location** to be updated.

- There are several options to find the address location:
  - The **View All** button which will show all of the address locations on one page. However, if there are a lot of address locations scrolling may be required.
  - Use the **left** and **right arrows** to click through them one at a time.
  - Use the **Find** link to find an address location based on a specific search term.

c. Make changes by clearing existing **Address Details** and entering new information in the fields.

To inactivate an address location no longer valid:

a. Click the **Correct History** button.
b. Select the appropriate **location** no longer used.
c. Select "**Inactive"** from the dropdown list found on the **General Info** tab in the **Address Details** section for that address location.
    - There are cases in which an old address should be retained and left active - for example, if the new address is an alternate address or a new location for a company with multiple locations.
    - Do not inactivate a location if there are open items.

To reactivate an address location:

a. Click the **Correct History** button.
b. Select the appropriate **location** to be reactivated.
c. Select "**Active**" from the dropdown list found on the **General Info** tab in the **Address Details** section for that address

To add or change an AP Origin Code in an existing customer address location:

a. Click the **Correct History** button.
b. Find and select the appropriate **location** with the AP origin code that needs updated.
c. Update the AP origin code in the **AP Origin** field found on the **General Info** tab in the **Address Details** section for that address.
    - An AP origin code is a unique three-character code that is tied to a specific location for a customer that is an agency of the state of Ohio.
    - The buying agency will provide the AP Origin Code for that specific location.
    - If the wrong AP origin code is used the voucher might not get routed to the right person for approval, which could delay payment.
d. Use the Look Up AP Origin icon to see a **list of AP origin codes** for that specific customer.
e. Choose the code given by the buying agency.

- Click here to watch a quick tutorial on adding an AP origin code to a customer.

To add or change a Speedchart in an existing customer address location:

a. Click the **Correct History** button.

b. Find and select the appropriate **location**.
c. Add or change the code in the **AP Speedchart** field.
d. Use the Look up icon for a **list of Speedcharts** for the customer.
   - A Speedchart is not required but may be provided by the buying state agency for recurring charges.
   - This field does not apply to customers other than state agencies.
   - Speedcharts are used in OAKS FIN as a shortcut to enter frequently used ChartField combinations. Using a Speedchart will make creating or updating a voucher faster and more efficient since it pre-populates information / data.

To add or change phone/fax information:

a. Click the **Correct History** button.
b. Select the appropriate **location** to be updated.
c. Click the **View Phone Information** link.
d. Make changes by clearing existing field information and entering new information.

7. Click **Save** to save any updates made.

Maintaining Customer Contacts

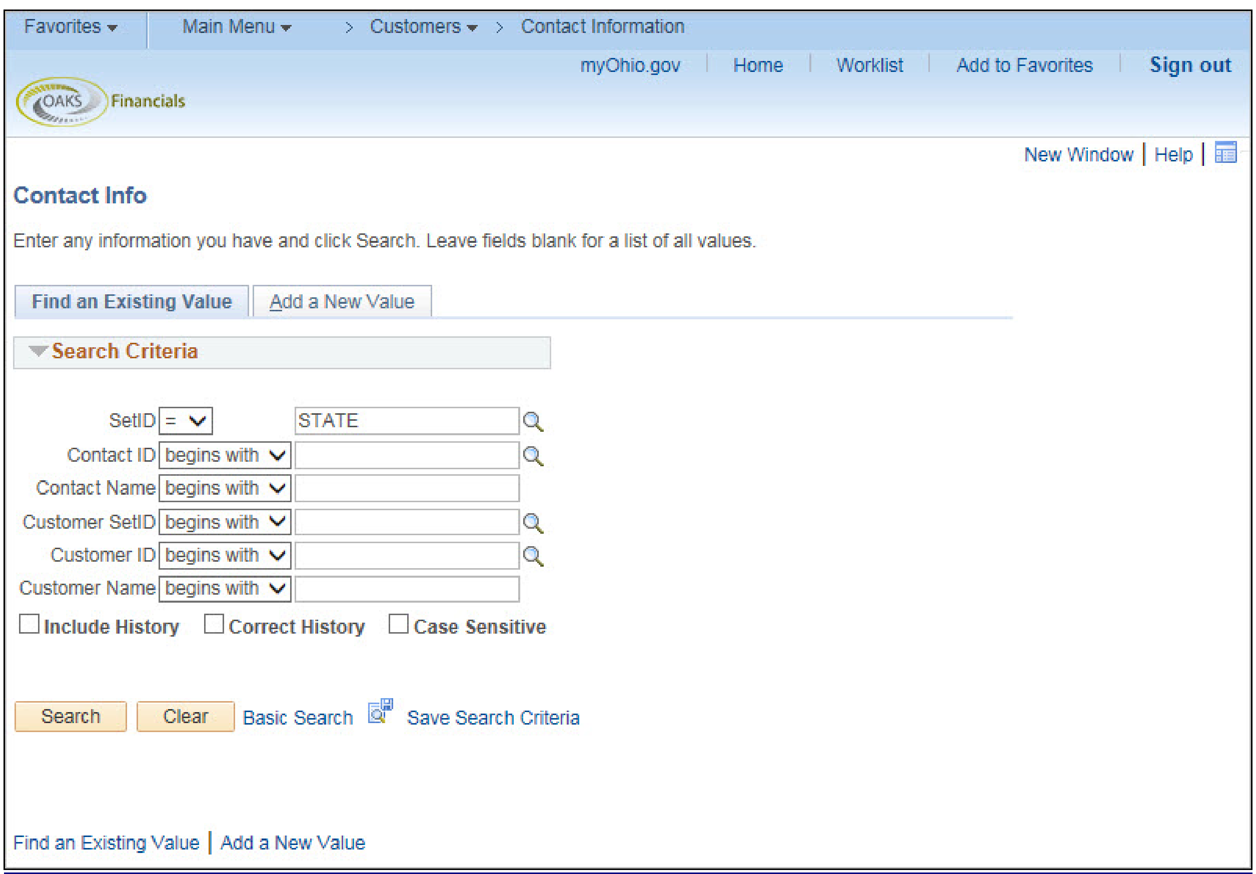
Overview

When the agency receives new or changed information concerning a customer contact (i.e., changed email address), the information in OAKS FIN must be updated to reflect the change.

These instructions cover the process for disassociating contacts from customers, if they no longer work together, and the editing of contacts whose contact details have changed.

Steps

- **OAKS FIN > Customers > Contact Information**

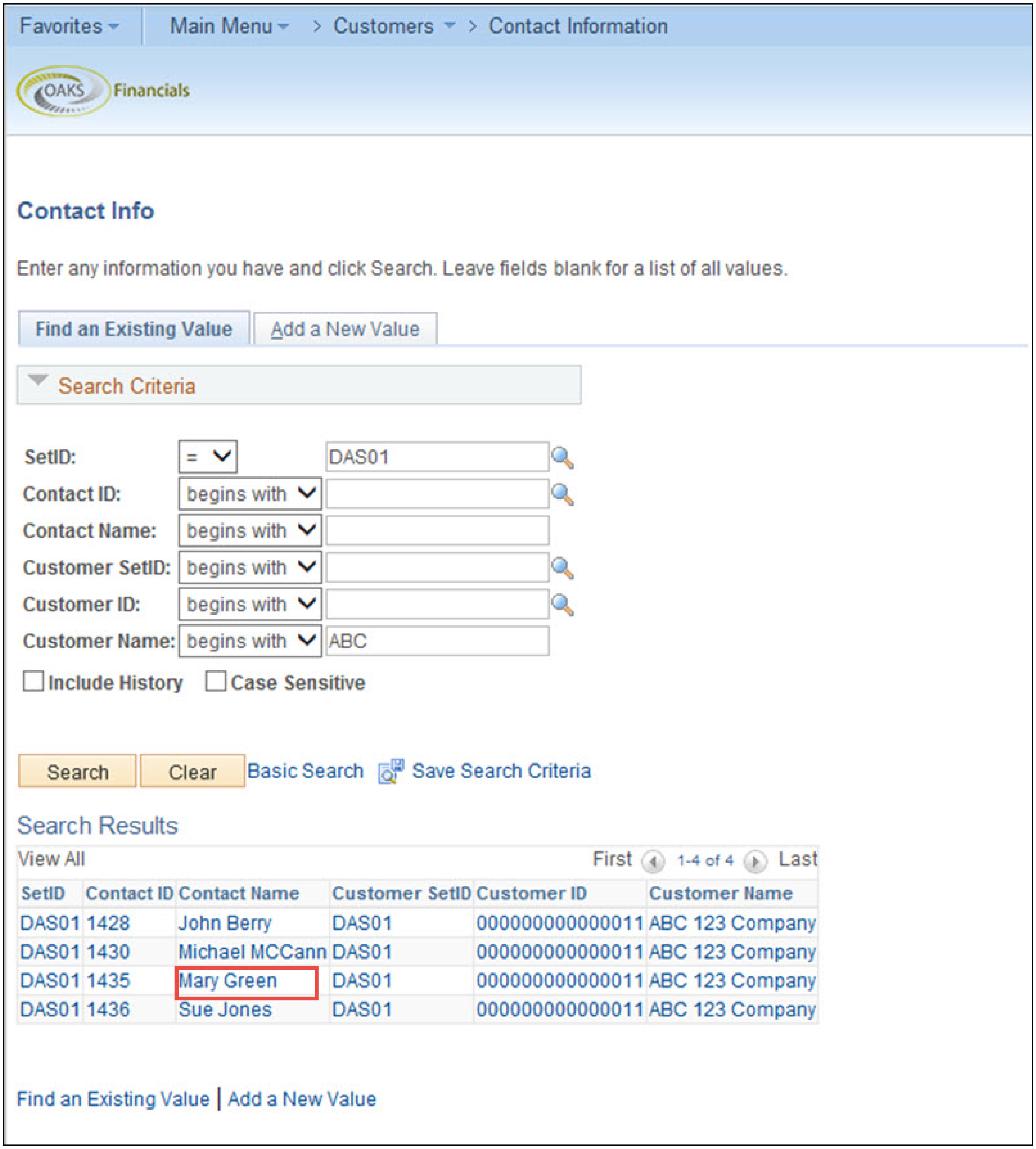


Editing Customer Contact Details

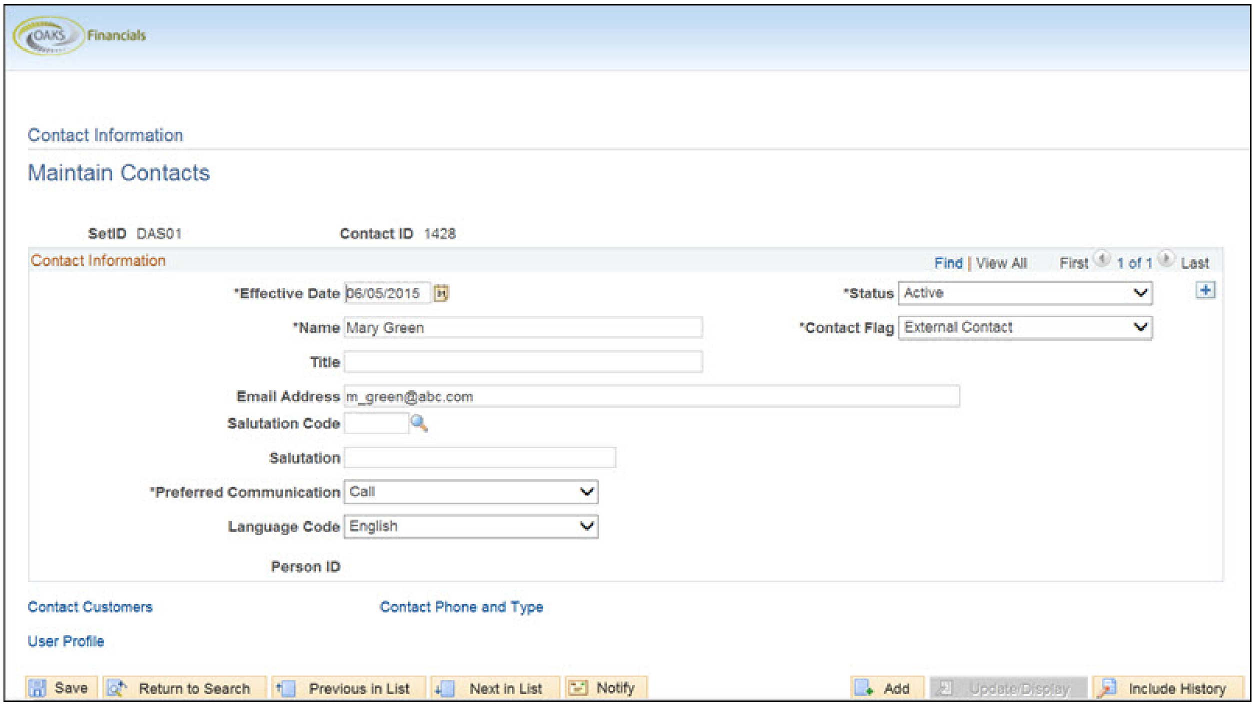
1. Click the **Find an Existing Value** tab.
2. Verify the agency business unit code in the **SetID** field.
3. Enter appropriate search criteria (e.g., **Contact Name,** or **Customer Name**) to find the contact(s) associated with that customer.
4. Click **Search**.

- After conducting a search, click the **Recent Search Results** icon at the end of the breadcrumb navigation anytime to display the **Recent Search Results** in a pop-up window.

5. Click on the appropriate **Contact ID** in the search results.



- If only one customer matches the search criteria, that contact record displays.



6. Make changes as necessary.

To add an additional contact for a customer:

a. Click the **View All** link to see all contacts for the customer. (Do not duplicate the customer name.)
b. Click the **Add a New Row** icon
    - The information on the line will duplicate to create a new line.

c. Key over the duplicate name and add or change additional information.
d. Click **Save**.

To add or change phone/fax information:

a. Select the appropriate **location** to be updated.
    - The **View All** button will show all of the contacts. However, if there are a lot of contacts scrolling may be required.
    - Use the **left** and **right arrows** to click through the contacts one at a time.
    - Use the **Find** link to find a contact based on a specific search term.

b. Click the **Contact Phone and Type** link.
c. Click the **View Phone Information** link.
d. Make changes by clearing existing field information and entering updated information in the field(s).
e. Click the **add a new row** icon. to add additional phone, fax, or cell numbers.

To add or change email address or other information:

a. Select the appropriate **location** to be updated.
b. Make changes by clearing existing **field information** and entering new information in the field(s).

7. Click **Save** to save all updates made.

Disassociating Contacts from Customers

When disassociating a contact and customer, it is most straightforward to look up the contact, as the process is performed from the contact record.

- Change the contact **Status** to "Inactive" if the contact no longer works for any customer the agency does business with.
- Click the **Delete Row** icon to the right of the row in the **Link Contact to Customer** area on the Contact Information page if the contact no longer works for a specific customer but may be a contact for another customer the agency does business with.