

New World ERP

Miscellaneous Billing Customer Setup

1. Navigate to Financial Management>Miscellaneous Billing>Customers
2. Click Search then click New

Miscellaneous Billing Customer List

Active Only Type Tax ID
 Category Driver's License Number
 Internal Customers Include
 Customer Number Inventory Customers Include
 Name / Business Work Order Customers Include
 Contact Address

Search Reset

Active	Customer Number	Customer Name	Type	Category	Tax ID Number
<input checked="" type="checkbox"/>	45	Brown, William C	Res		
<input checked="" type="checkbox"/>	36	Candor, Sheila	Cobra	Individual	432-12-1221
<input checked="" type="checkbox"/>	75	Carlsmith Ball LLP	Law Firms		
<input checked="" type="checkbox"/>	77	Carter, Kristie A	Home Bus	Business	555-44-9999
<input checked="" type="checkbox"/>	46	Carter, Kristie A	Res		555-44-9999
<input checked="" type="checkbox"/>	48	Charms, Gayle	Non-Emp Billing	Individual	
<input checked="" type="checkbox"/>	79	City of Troy	Internal Billing	Department	
<input checked="" type="checkbox"/>	39	Clark, Buford J.	BID #1	Individual	986-57-4838
<input checked="" type="checkbox"/>	16	Collision Specialists	BID #1	Business	383-00-1195
<input checked="" type="checkbox"/>	17	Cooker Textiles	BID #1	Business	
<input checked="" type="checkbox"/>	40	Counter, Julie	Cobra	Individual	808-66-1553
<input checked="" type="checkbox"/>	69	County, Collin	Com		

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New Delete Refresh Print

3. Fill in the required fields then click Save. If you have another customer to setup click Save/New

Miscellaneous Billing Customer

Attribute Identification

Last Name / Business Jurkins Janitorial Service State Tax ID
 First Name Social Security Number
 Middle Name Driver's License Number
 Suffix Phone Number
 Primary Address 4573 Main St Type Developer - Developer
 Internal Customer
 Inventory Customer
 Category
 Bill Inventory Inventory
 Zip Code 43011
 City CENTERBURG
 State OH - Ohio
 Work Order Customer Category
 Bill Work Orders Standard Bill
 Exempt from Late Fees
 Exempt from Finance Charges

Name SSN/Fed Tax ID Driver's License

Save Save/New Delete Reset Notes

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4. Select Contacts in the Attribute dropdown list if the customer has multiple address or additional information such as an email address that you want to keep track of. While on the Contacts screen, click the Save/New button to add an additional contact for this customer

Miscellaneous Billing Customer - 98 Jurkins Janitorial Service

Attribute: **Contacts**

Contact Name: Jurkins Janitorial Service - Primary

Name / Address	Contact Information
Name: Jurkins Janitorial Service	Active: <input checked="" type="checkbox"/>
Description:	Primary: <input checked="" type="checkbox"/>
Address: 4573 Main St	Phone Number:
	Extension:
	Type:
Zip Code: 43011	Alternate Phone Number:
City: CENTERBURG	Extension:
State: OH - Ohio	Type:
Bank Information	Fax Invoices/Notices/Statements: <input type="checkbox"/>
Bank Draft: <input type="checkbox"/>	Fax Number:
Routing Number:	Email Invoices/Notices/Statements: <input type="checkbox"/>
Account Number:	Email Address:
Account Type:	Print Statement: <input checked="" type="checkbox"/>
Notice Sent: <input type="checkbox"/>	January thru December

New Save Save/New Delete Reset