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Search for and Create Customer in Accounts Receivable/General Billing
Munis by Tyler Technologies

Background: This document will show how to look up a customer. If customer does not exist in the system, this document explains how to create a customer.

Table of Contents

Step-by-step Instructions:

Customers

Overview

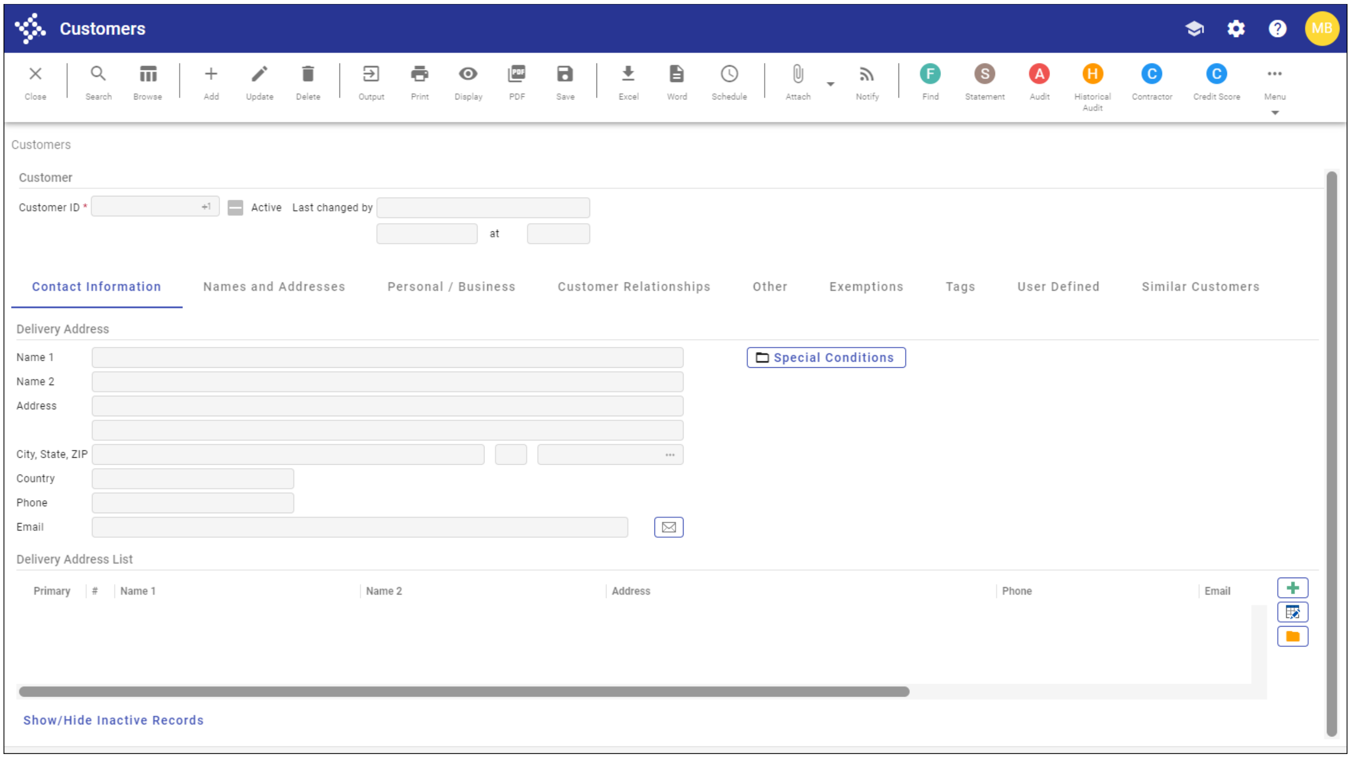
The Customers program identifies existing or new customers and their related addresses for billing and payments. Customer records are used throughout Munis Revenues programs, including General Billing, Permits, Business Licenses, and Utility Billing. Fields and options in the Customers program may vary according to the Munis product used to access the program.

Procedures

Search for a Customer Record

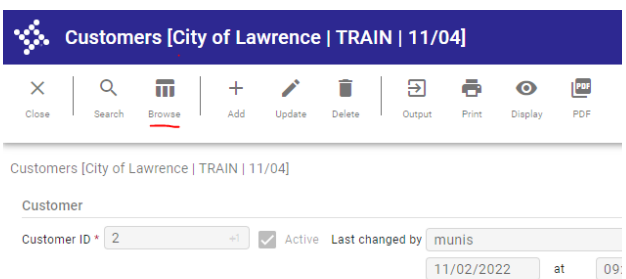
Note – all fields with red * are required.

1. Open the Customers program.
   Munis > General Revenues > Accounts Receivable > Setup > Customers



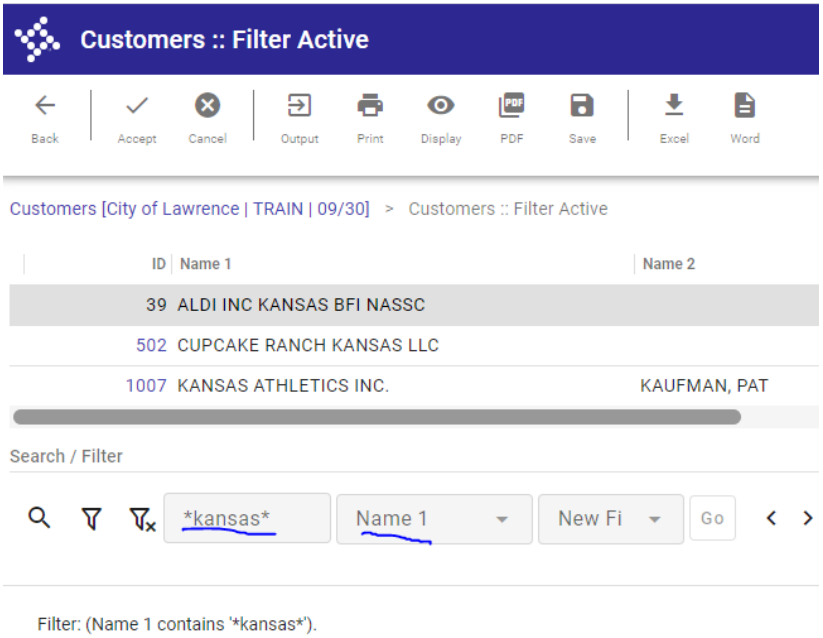
2. Click Search, then Accept, then click “Yes”. Now you are in the customer records.

3. Click Browse in the upper white ribbon to search for the customer.



4. Go to bottom of the screen and use funnel/filter to define your search.

Tip – use “*” before, after, and before and after. The search will result everything that contains what you are searching.



5. If you determine your customer exists, you must use the customer existing in the system. There only needs to be one customer record for each customer. The same customer record can be accessed and used by all City departments. The City's goal is to have **NO DUPLICATE CUSTOMERS**.
6. To view, double click or highlight the customer record and hit Accept in the upper white ribbon.
7. If you determine your customer is not in the system, Click Back to return to the main Customer screen.

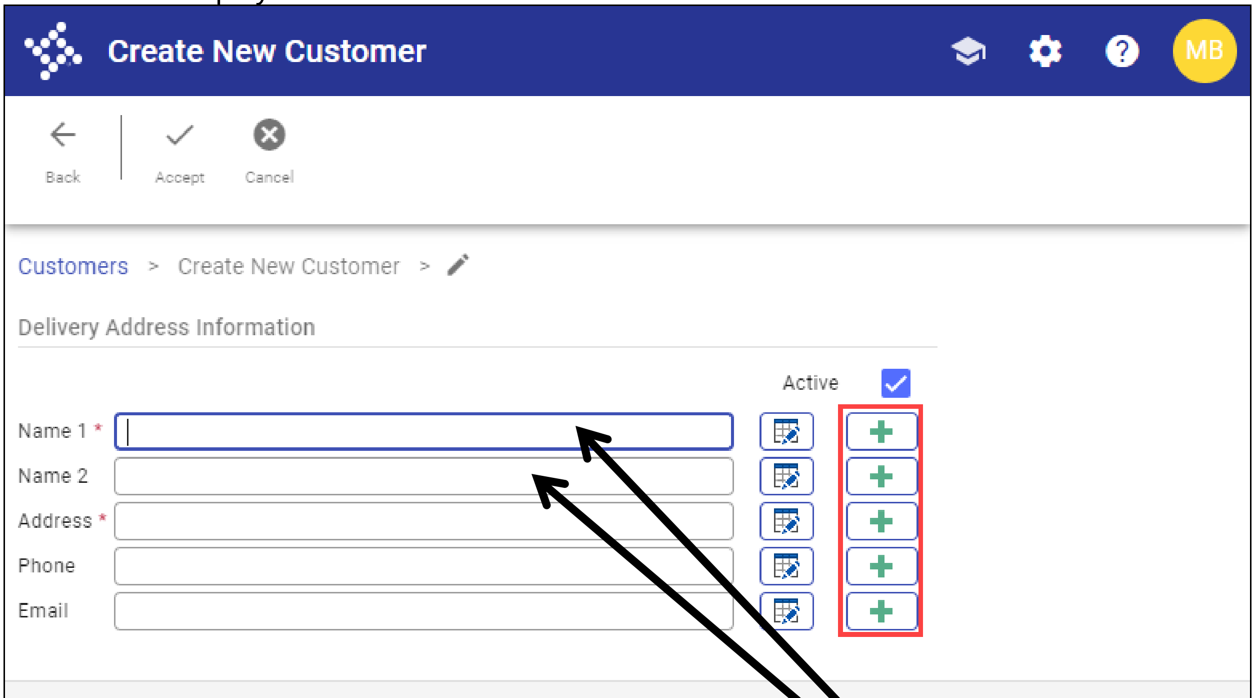
Adding a Customer Record

10/11/2023 NOTE: WHEN ADDING A CUSTOMER PLEASE MAKE SURE THAT THERE ARE NO SPACES AT THE END OF THE CUSTOMERS NAME [NAME 1 & NAME 2] ENTRY. IT WAS DISCOVERED IF THERE ARE SPACES AFTER THE NAME THE CUSTOMER'S INVOICES WILL NOT GET SAVED IN EERP & TYLER CONTENT MANAGER. THANK YOU. Jane Cotitta

1. Click + Add.
2. In the Customer ID field, click +1 to assign the next available customer ID number.

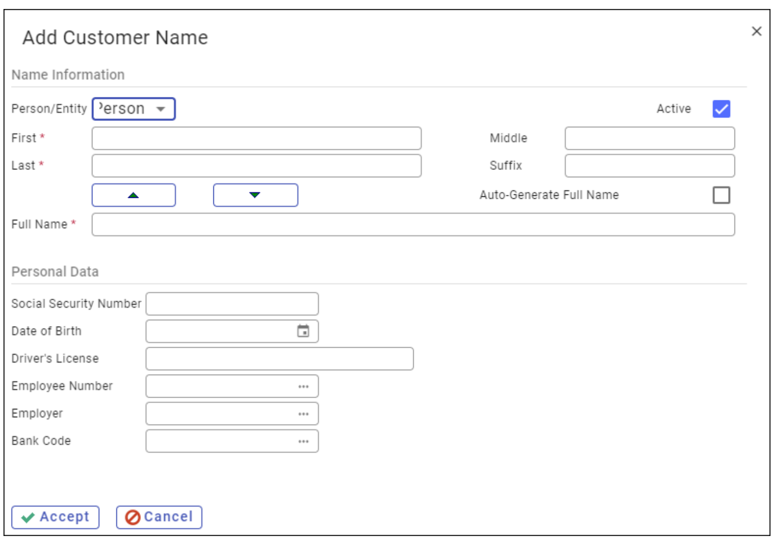
3. Ensure that the Active checkbox is selected.

4. Press Tab to display the Create New Customer screen.



5. Click + to the right of Name 1 field. **USE ALL CAPS IN ALL FIELDS**

6. The program displays the Add Customer Name dialog box.



REMEMBER
NO SPACES AT THE END OF THE CUSTOMERS NAME.
😊

7. Choose from dropdown Person or Entity.
8. Enter the business name or customer's first name, last name, middle name, and suffix as applicable.
9. Complete the remaining Personal Data fields as required.
10. Click Accept to save the record.
11. If applicable, click + to the right of the Name 2 field, to add an additional name.

12. Click + to the right the Address field to display the Add Customer Address dialog box.

13. Complete the address fields and then click Accept to close the dialog box.
14. Click + to the right of the Phone and Email fields, as appropriate. When you click Add, the program displays a detail dialog box for data entry. Click Accept when completed.
15. When the customer information is complete, click Accept in upper white ribbon.
    The program returns you to the main Customers screen with the Contact Information tab completed.