

HOW TO CREATE OR MAINTAIN CUSTOMER PROFILES IN BANNER FIS
Customer Profile Definition Form (TGACPRF)

General:

The *Customer Profile Definition Form* is used to identify a customer with an entity category for non-student billing and reporting purposes, to set a credit limit for the customer's account, and to establish a default address type. This form also allows entry of free-format comments associated with the customer.

Prior to using this form, the customer must be created with an ID number and name on the *Identification Form* (SPAIDEN or FOAIDEN).

Note: The information on this form is optional.

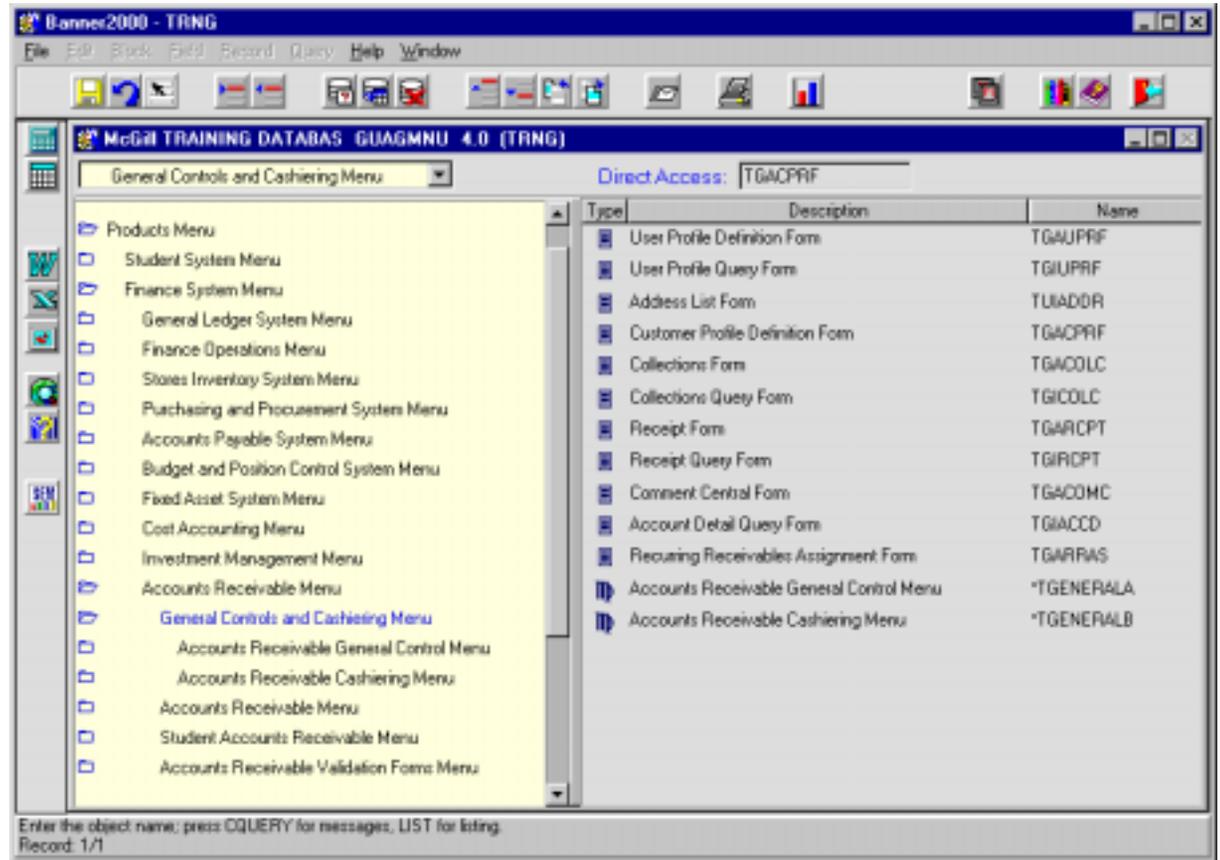
Accessing the "Customer Profile Definition Form" (TGACPRF)

Type the name of the form **TGACPRF** in the Direct Access field.

(OR)

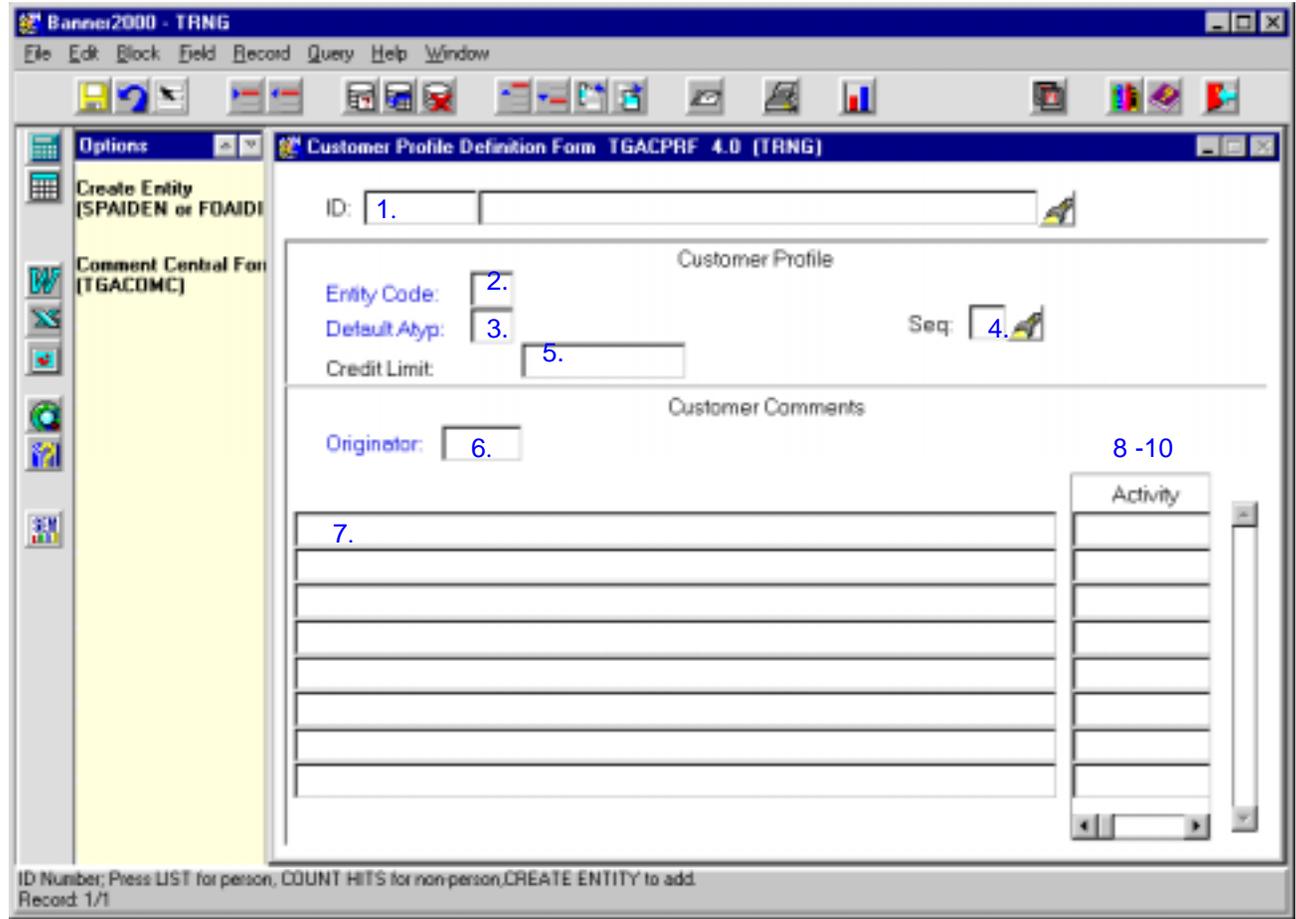
Use the Menu Selection:

- 1) Access Products Menu
- 2) Select Main Finance System Menu
- 3) Select Accounts Receivable Menu
- 4) Select General Controls and Cashiering Menu
- 5) Select Customer Profile Definition Form (TGACPRF)



The adjacent screen should appear:

NOTE: Numbers have been added to the form above to help find and identify the different fields. These numbers correspond to the table below, which not only describes what a user needs to enter in each individual field but also defines or explains the field's purpose.



<i>Req'd</i>	<i>#</i>	<i>Field</i>	<i>Action</i>	<i>Reaction</i>	<i>Explanation/Description</i>	<i>Related Documentation</i>
✓	1.	ID	Enter or {Search} for customer Identification number.		Customer identification number. Customer ID must already have been created on the Identification Form (SPAIDEN or FOAIDEN).	⇒ Person Search Form (SOAIDEN) ⇒ Non-Person Search Form (SOACOMP)
✓			Proceed to the {Next Block}			

Customer Profile

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	2.	Entity Code			Entity category code that is associated with the customer for billing and reporting purposes.	
	3.	Default Atyp			Address type. The default address for the customers account (Where the bill will be sent to). Works along with the Seq field. If address type is blank, then an address must be selected from TUIADDR for billing purposes.	⇒ Address List Form (TUIADDR)
	4.	Seq			There may be more than one sequence of address type for a given customer.	⇒ Address List Form (TUIADDR)
	5.	Credit Limit			The maximum amount that may be incurred by the customer's account.	
✓			Proceed to the {Next Block}			
Customer Comments						
	6.	Originator			An area is defined on STVORIG as originating the comments. ACRV – Accounts Receivable SACT – Student Accounts etc.	
✓			Proceed to the {Next Block}			
	7.	Unlabelled (Comment text field)			This field can be used to enter any free form comment text about the customer.	
	8.	Activity			Scroll to the Activity section.	
	9.	Origin			Scroll to the Originator section.	
	10.	User			Scroll to the User section.	
✓			Save the record.		Saves record.	