# Customer Requests

## Overview

Each school has their own customer (debtor) ledger, so it is possible that a customer may be set up multiple times (one for each school where invoices are raised from).

The customer approval process has been invoked on the system in order to make sure that all the necessary customer fields have been updated. There is no other checking of the customer by the central finance team.

## The Process

| Step | School | System | Central Finance Team |
|---|---|---|---|
| 1 | ▪ The need for a new customer is identified at the school. | | |
| 2 | ▪ Enter the required customer detail as a customer request on the finance system.<br>▪ Submit the request. | | |
| 3 | | ▪ Automatic Notification of Request sent to finance system | |
| 4 | | | ▪ Customer request is received electronically.<br>▪ Customer request is reviewed to make sure all necessary fields are completed.<br>▪ Customer is approved. |
| 7 | | ▪ Automatic Notification of the results are sent to originator. | |
| 8 | ▪ Email notification sent to originator that the customer is available to be used on the finance system.<br>▪ Rejections are also notified, so the school can review/rectify. | | |
| 9 | ▪ School can enter the sales invoice against the customer. | | |