

BM1631 – Customer ID Change Screen

Description

Use the Customer ID Change Screen to change customer identification numbers. Entries are held in a change file until the Batch Customer ID Change Process (BM1744J) is executed. At that time, the customer ID is updated in the Customer Accounts File.

User Functions

Key	Label	Function
F1	Refresh	Redisplays the screen and clears any entered data.
F2	Add	Adds a customer ID number change to the change file. You must have access level 2 (add, change, and inquire) or greater to perform this action.
F3	Change	Allows you to modify a customer ID number change if it is still in the change file. You must have user access level 1 (change and inquire) or greater to perform this action.
F4	Inquire	Displays the status of a customer ID number change. You must have user access level 0 (inquire only) or greater to perform this action.
F5	Delete	Deletes a customer ID number change. You must have user access level 3 (add, change, delete, and inquire) or greater to perform this action.
F6	List	Lists the customer ID number change entries. You must have user access level 0 (inquire only) or greater to perform this action.
F7	Help	Not available.
F8	Menu	Returns you to the FMS Menu where you can select a different process or log off the system.

Adding a Customer ID Change Record

1. Type in the current Customer ID Number and Type.
2. Press Add (F2).
3. Type in the new Customer ID Number and Type.
4. Press Enter.

The change record will be saved to the change file. A new blank line item will open so you can perform the next change record activity.

Changing a Customer ID Change Record

1. Type in the current Customer ID Number and Type.

2. Press Change (F3).
3. Modify the Customer ID Number and Type.
4. Press Enter.

The modified change record will be saved to the change file. A new blank line item will open so you can perform the next change record activity.

Displaying a Customer ID Change Record

1. Type in the Customer ID Number and Type.
2. Press Inquire (F4).

The customer ID change record is displayed. Note: You can use this function to view any change records, even those that have been previously updated in the Customer Accounts File.

Deleting a Customer ID Change Record

1. Type in the Customer ID Number and Type.
2. Press Delete (F5).

The existing customer change ID record is displayed.

3. Press Delete (F5) again to confirm the deletion.

A prompt will confirm that the deletion has been performed. A new blank line item will open so you can perform the next change record activity.

Displaying a List of Current Customer ID Change Records

Press List (F6). A list of the customer ID change records entered since the last time the Batch Customer ID Change Process (BM1744J) was run will be displayed. If the Change Process was run recently, there may be no items in the list.

Data Fields

Date (display only)	New Cust ID (required under certain conditions)
Current Cust ID (key; required under certain conditions)	Entry Date (display only)
Customer Name (display only)	Update Date (display only)
Home Campus (display only)	

Date

Definition	Display only. The current date.
Length	6 digits
Format	MM/DD/YY

Current Customer ID

Definition	<p>Key field. Entry required for add, change, inquire and delete functions, but not for list function. The current number or code uniquely identifying a customer and the customer type.</p> <p>The customer number can be:</p> <ul style="list-style-type: none">• a student's identification number• an employee's Social Security number• a vendor's identification number• any other number which identifies the customer <p>The customer type can be:</p> <p>S Student E Employee V Vendor O Other R Receivable (not currently used)</p>
Length	9 characters followed by 1 character

Customer Name

Definition	Display only. The name of a customer.
Length	30 characters

Home Campus

Definition	Display only. A code identifying the home campus of a customer.
Length	3 digits
Additional Information	This field is used for verifying the customer and to limit the scope of changes made to the database.

New Customer ID

Definition	<p>Entry required for add and change functions but not for inquire, delete or list functions. The new identification code for the customer.</p> <p>See Current Customer ID definition for valid entries.</p>
Length	9 characters followed by 1 character.
Additional Information	This code will become effective once the Batch Customer ID Change Process (BM1744J) is run.

Entry Date

Definition	Display only. A date identifying when the change request was entered into the change file.
Length	6 digits
Format	MMDDYY

Update Date

Definition	Display only. A date identifying when a customer ID was changed in the Customer Accounts File.
Length	6 digits
Format	MMDDYY
Additional Information	The field will remain blank until the change has been made to the Customer Accounts File.