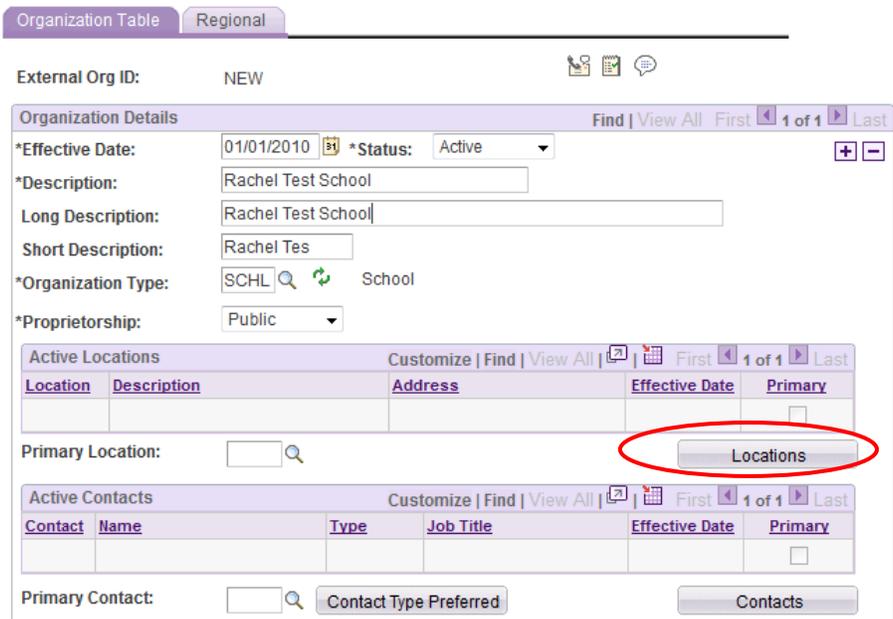
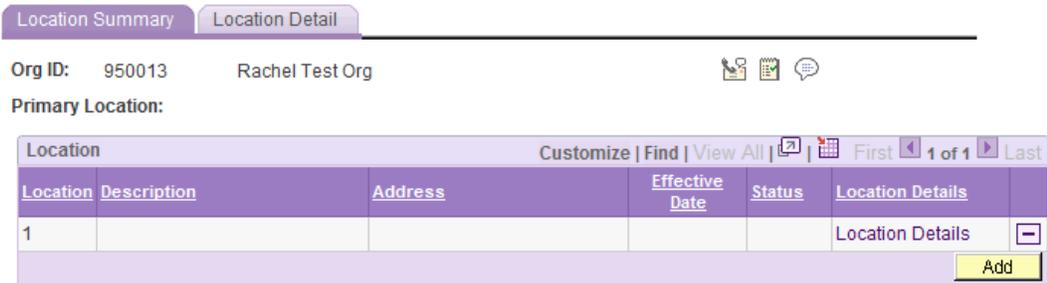


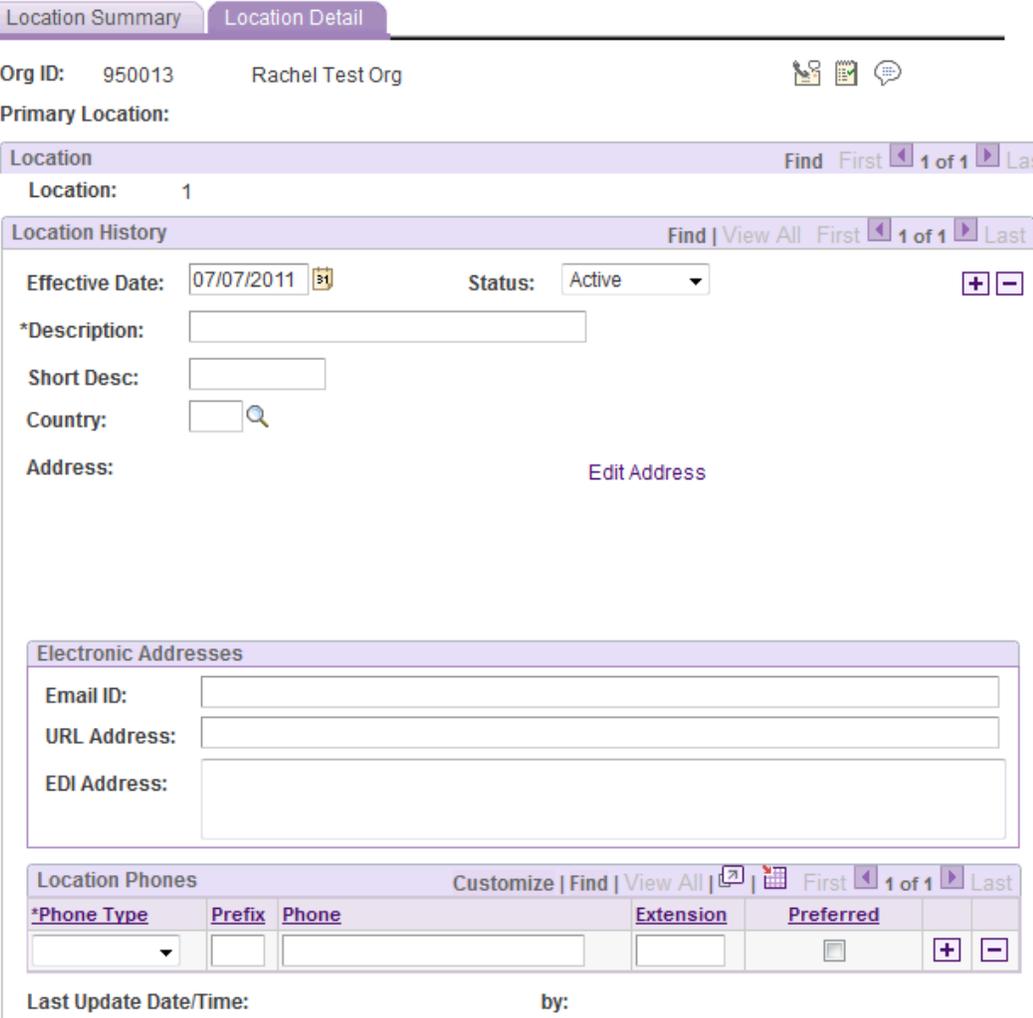
## Entering Organizations – (Student Financials for adding Third Party Contracts)

**Purpose:** Records for organizations such as third parties and other external organizations must be entered into the system. Prior to entering a new organization, check to see if the org already exists (e.g. If it is a school, Admissions may have already set up).

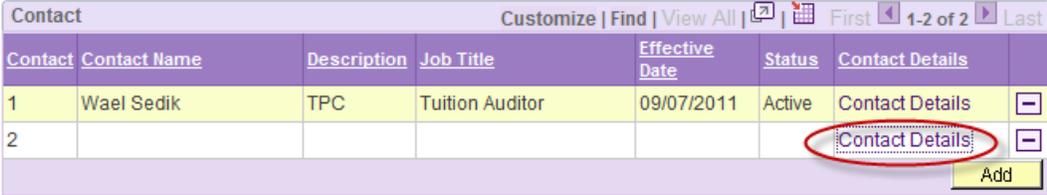
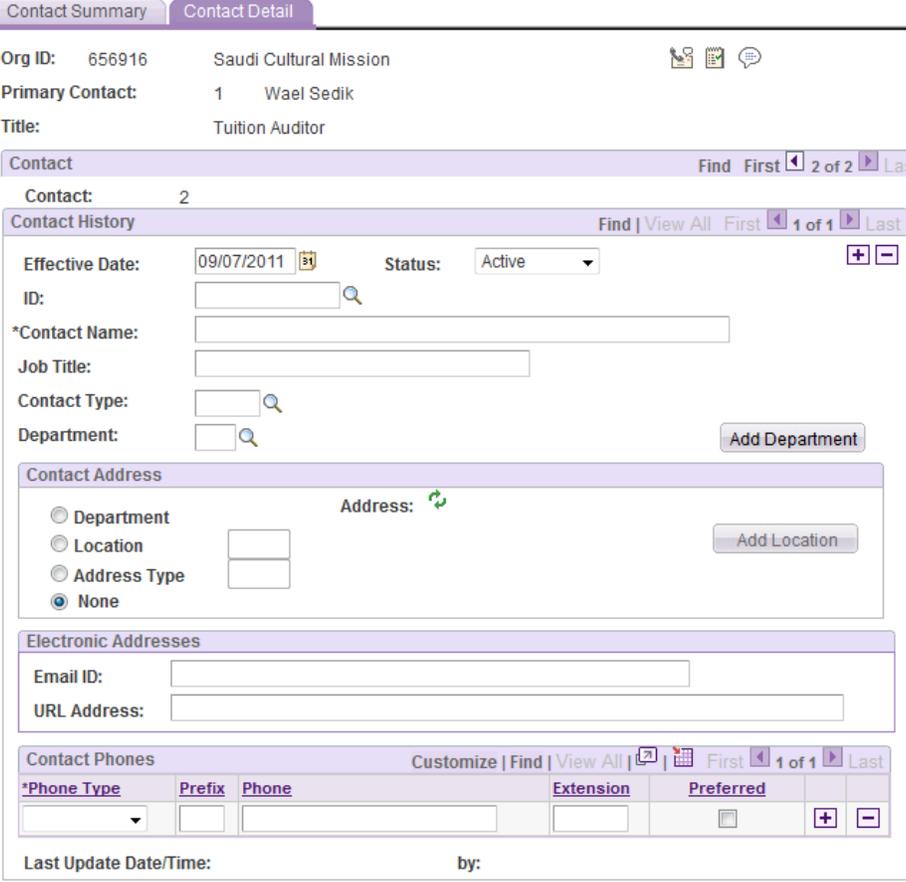
Step	Action
1.	<p>Navigate to the <b>Organization Table</b> page: <b>Main Menu &gt; Campus Community &gt; Organization &gt; Create/Maintain Organizations &gt; Organization Table</b></p> <p><i>Favorites</i> : Main Menu &gt; Campus Community &gt; Organization &gt; Create/Maintain Organizations &gt; Organization Table</p> <p><b>Organization Table</b></p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value   Add a New Value</p> <hr/> <p>Maximum number of rows to return (up to 300): <input type="text" value="300"/></p> <p>External Org ID: <input type="text" value="begins with"/> <input type="button" value="Q"/></p> <p>Search Name: <input type="text" value="begins with"/></p> <p>Organization Type: <input type="text" value="begins with"/> <input type="button" value="Q"/></p> <p>ATP Code: <input type="text" value="begins with"/></p> <p>FICE Code: <input type="text" value="begins with"/></p> <p>City: <input type="text" value="begins with"/></p> <p>State: <input type="text" value="begins with"/> <input type="button" value="Q"/></p> <p>Country: <input type="text" value="begins with"/> <input type="button" value="Q"/></p> <p><input type="checkbox"/> Include History   <input type="checkbox"/> Correct History   <input type="checkbox"/> Case Sensitive</p> <p><input type="button" value="Search"/>   <input type="button" value="Clear"/>   <a href="#">Basic Search</a>   <input type="button" value="Save Search Criteria"/></p>
2.	<p>Enter search criteria to see if the school already exists. Tip: Use the Search Name “contains” to find any possible matches. If you find the Organization already exists, use the <b>Add Row</b> button to add your Third Party Contract <i>location</i> and <i>contact</i> information.</p>
3.	<p>If the school does not exist, click the <b>Add a New Value</b> tab.</p> <p><b>Organization Table</b></p> <p>Find an Existing Value   Add a New Value</p> <hr/> <p>External Org ID: <input type="text" value="NEW"/></p> <p><input type="button" value="Add"/></p>

Step	Action																																
4.	<p>Retain the value of <b>NEW</b> as a temporary ID. When all the details required to add the organization's record are completed and saved, the system will automatically assign the next sequential number as the ID number for the new organization.</p> <p>Click the <b>Add</b> button.</p> <div data-bbox="354 489 500 531" style="border: 1px solid gray; padding: 2px; display: inline-block; margin-bottom: 10px;">Add</div> <p><b>Result:</b> The <b>Organization Table</b> displays.</p> <div data-bbox="354 642 1365 1816" style="border: 1px solid gray; padding: 5px;"> <p>Organization Table <span style="border: 1px solid gray; padding: 2px;">Regional</span></p> <p>External Org ID: NEW <span style="float: right;">🔍 📄 💬</span></p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>Organization Details <span style="float: right;">Find   View All   First 1 of 1 Last</span></p> <p>*Effective Date: 07/07/2011 <span style="font-size: small;">📅</span> *Status: Active <span style="float: right;">+ -</span></p> <p>*Description: <input type="text"/></p> <p>Long Description: <input type="text"/></p> <p>Short Description: <input type="text"/></p> <p>*Organization Type: SCHL <span style="font-size: small;">🔍 🔄</span> School</p> <p>*Proprietorship: Public <span style="float: right;">▾</span></p> </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>Active Locations <span style="float: right;">Customize   Find   View All   📅   First 1 of 1 Last</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-decoration: underline;">Location</th> <th style="text-decoration: underline;">Description</th> <th style="text-decoration: underline;">Address</th> <th style="text-decoration: underline;">Effective Date</th> <th style="text-decoration: underline;">Primary</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table> <p>Primary Location: <input type="text"/> <span style="font-size: small;">🔍</span> <span style="float: right; border: 1px solid gray; padding: 2px;">Locations</span></p> </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>Active Contacts <span style="float: right;">Customize   Find   View All   📅   First 1 of 1 Last</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-decoration: underline;">Contact</th> <th style="text-decoration: underline;">Name</th> <th style="text-decoration: underline;">Type</th> <th style="text-decoration: underline;">Job Title</th> <th style="text-decoration: underline;">Effective Date</th> <th style="text-decoration: underline;">Primary</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table> <p>Primary Contact: <input type="text"/> <span style="font-size: small;">🔍</span> <span style="border: 1px solid gray; padding: 2px; margin-left: 5px;">Contact Type Preferred</span> <span style="float: right; border: 1px solid gray; padding: 2px;">Contacts</span></p> </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> <p>Active Departments <span style="float: right;">Customize   Find   View All   📅   First 1 of 1 Last</span></p> <table border="1" style="width: 100%; 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padding: 2px; margin-right: 5px;">Save</span> <span style="border: 1px solid gray; padding: 2px; margin-right: 5px;">Notify</span> <span style="border: 1px solid gray; padding: 2px; margin-right: 5px;">+ Add</span> <span style="border: 1px solid gray; padding: 2px; margin-right: 5px;">📄 Update/Display</span> <span style="border: 1px solid gray; padding: 2px; margin-right: 5px;">📄 Include History</span> <span style="border: 1px solid gray; padding: 2px;">📄 Correct History</span> </div> </div>	Location	Description	Address	Effective Date	Primary					<input type="checkbox"/>	Contact	Name	Type	Job Title	Effective Date	Primary						<input type="checkbox"/>	Department	Description	Type	Effective Date	Primary					<input type="checkbox"/>
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5.	<p>On the <b>Organization Table</b> page complete the following:</p> <ul style="list-style-type: none"> <li>• <b>Effective Date</b> – Defaults to today’s date. Leave current date.</li> <li>• <b>Status</b> – Select <b>Active</b></li> <li>• <b>Description</b> – Enter third party name (e.g. Saudi Cultural Mission). 30 char limit</li> <li>• <b>Long Description</b> – Use the TAB key to auto-populate this field. 50 char limit</li> <li>• <b>Short Description</b> – Use the TAB key to auto-populate this field. 12 char limit.</li> <li>• <b>Organizational Type</b> – Select <b>SFTP – Student Financials Third Party</b>. Note: Other types may be used by other functional areas.</li> <li>• <b>Proprietorship</b> – Select <b>Public</b> (Exception – If you know it is a private org, such as a church, select <b>Private</b>).</li> </ul>
6.	<p>Since this is a third party, the location must be added. Click the <b>Locations</b> button.</p>  <p><b>Result:</b> The <i>Location Summary</i> tab displays.</p> 

Step	Action
7.	<p>Click the <i>Location Detail</i> tab.</p>  <p>Complete the following:</p> <ul style="list-style-type: none"> <li>• <b>Effective Date</b> – Defaults to today’s date. Leave as is.</li> <li>• <b>Description</b> – Enter as appropriate, (e.g. Main or City)</li> <li>• <b>Country</b> – Select the appropriate country for the third party</li> </ul>

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8.	<p>Click the <b>Edit Address</b> link.</p> <p><b>Result:</b> The Edit Address page displays.</p> <p><b>Edit Address</b></p> <p>Country: United States <a href="#">Change Country</a></p> <p>Address 1: <input type="text"/></p> <p>Address 2: <input type="text"/></p> <p>Address 3: <input type="text"/></p> <p>City: <input type="text"/> State: <input type="text"/>  Postal: <input type="text"/></p> <p>County: <input type="text"/></p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> <p><input type="checkbox"/> <b>Override Address Verification</b></p>														
9.	<p>Enter the address information if you have it, otherwise enter the city/state. Click the <b>OK</b> button.</p> <p><b>Result:</b> The address populates on the <i>Location Detail</i> tab. The system runs “clean address” to verify the address. If needed, use the <b>Override Address Verification checkbox</b>, or correct errors by using the system suggestions.</p>														
10.	<p>Click the <b>OK</b> button.</p> <p><b>Result:</b> The location populates on the Organization Table.</p>														
11.	<p>In the <i>Active Contacts</i> section, click the <b>Contacts</b> button to add a new contact.</p> <p><input type="button" value="Contacts"/></p>														
12.	<p>Click the <b>Add</b> button.</p> <p><input type="button" value="Contact Summary"/> <input type="button" value="Contact Detail"/></p> <p>Org ID: 656916 Saudi Cultural Mission   </p> <p>Primary Contact: 1 Wael Sedik</p> <table border="1" data-bbox="370 1497 1385 1654"> <thead> <tr> <th>Contact</th> <th>Contact Name</th> <th>Description</th> <th>Job Title</th> <th>Effective Date</th> <th>Status</th> <th>Contact Details</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Wael Sedik</td> <td>TPC</td> <td>Tuition Auditor</td> <td>09/07/2011</td> <td>Active</td> <td>Contact Details <input type="button" value="-"/></td> </tr> </tbody> </table> <p><input type="button" value="Add"/></p>	Contact	Contact Name	Description	Job Title	Effective Date	Status	Contact Details	1	Wael Sedik	TPC	Tuition Auditor	09/07/2011	Active	Contact Details <input type="button" value="-"/>
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Step	Action
13.	<p>Click the <b>Contact Details</b> link for the new contact you are adding.</p>  <p><b>Result:</b> The <i>Contact Detail</i> tab displays:</p> 
14.	<p>Complete the following:</p> <ul style="list-style-type: none"> <li>• <b>Contact Name</b> – Enter as appropriate</li> <li>• <b>Title</b> – Enter if applicable, optional.</li> <li>• <b>Contact Type</b> – Select or enter TPC</li> <li>• <b>Department</b> – Enter if applicable, optional.</li> </ul>
15.	<p>Click the <b>Address Refresh</b> icon </p> <p><b>Result:</b> This populates the address. You may add email and phone details if desired.</p>

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Step	Action
16.	Click the <b>Apply</b> button. Note: The system will prompt you, asking if this is the primary contact. Click <b>Yes</b> . Click <b>OK</b> .
17.	Click the <b>Save</b> button.  <i>Result:</i> The new third party has been saved and a new organization ID has been assigned. You may now set up this third party org as a Third Party Contract.