

# BYU Dining Services

## Standard Operating Procedures

### BP0014: Customers

**Business Process ID:** [BP0014](#)  
**SOP Collection:** [Eatec SOPs](#)  
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**URL:** [/policy/eatec/customers](#)

**SOP Owner:** Andrea Richards, Assistant Controller  
**Accountable Group:** Dining Accounting Collaborative Business Process

#### Purpose

This standard operating procedure outlines the process users follow to create customers. This includes the steps to include the correct information for each customer type.

#### Responsibilities

Area Responsibilities	Centralized Responsibilities
<p><b>Food To-Go or Catering Eatec user</b> – Department managers in Food To-Go and Catering designate one or more employees to manage customers in Eatec. These employee’s responsibilities include:</p> <ul style="list-style-type: none"><li>• Ensure that customers are created properly and obtain a TC-721 (Utah State Tax Commission Exemption Certificate).</li></ul> <p><b>All other Eatec Users</b> – If areas besides Food To-Go and Catering need customers created, please send a request to <a href="mailto:dininghelpdesk@byu.edu">dininghelpdesk@byu.edu</a>. These will be forwarded to Dining Accounting to be set up within one business day.</p>	<p><b><u>Dining Accounting</u></b> Assistant Controller (Andrea Richards) – Andrea’s responsibilities include:</p> <ul style="list-style-type: none"><li>• Train Food-To-Go &amp; Catering users on and ensure compliance with this SOP.</li><li>• Review new customers created by Food-To-Go &amp; Catering each day to ensure they are setup properly --especially Wards, Cougar Cash. This is a passive approval by Dining Accounting.</li><li>• Review and edit OnDemand created customers.</li></ul>

## SOP User Guide

### Contents

Purpose .....	1
Responsibilities .....	1
SOP User Guide .....	2
Customer Type Definitions.....	2
Creating New Customers During the Ordering Process .....	4
Creating New Customers Through Customer Module .....	5
Food To-Go and Catering Review of Customer Setup.....	6
Dining Accounting Review of Customer Setup.....	6

### Customer Type Definitions

**Cash/Credit Card—Taxable:** This is the default customer type who are expected to be paying with cash or credit card.

Setup:

- Debit Account (T-Out): “None”
- Debit Dept (T-Out): “None”
- Tax Region: “Utah”

**Cash/Credit Card--Tax Exempt:** Customers paying with cash or a credit card who submit a signed TC 721 form. **Customers must submit the TC 721 and it must be on file with Dining Services Assistant Controller.** Cashiers are notified by the “Customer Type” printing on the Quick Orders/Sales Orders and related Invoice reports as to which POS Tender type to use on the cash register.

Setup:

- Other Name(s): Customer Utah Sales Tax Id.
- Debit Account (T-Out): “None”
- Debit Dept (T-Out): “None”
- Tax Region: “Non-Tax”

**Wards & Stakes:** Non-BYU church entities. Includes wards, stakes, seminaries, missions, etc. **Cashiers should never take a credit card/cash for these customers.**

Setup:

- Customer Name: {Ward Name} - {Stake Name} from Church Directory.
- Number: Church Unit Number
- Debit Account (T-Out): “1230 - Church Receivable”

- Debit Dept (T-Out): "CC10233 - DS Accounting"
- Tax Region: "Non-Tax"

**Cougar Cash Card:** BYU campus departments or users who pay with a Cougar Cash/Department card. The POS will determine if the sale is taxable or not, not Eatec.

Setup:

- Customer Name: Card Name per Atrium (Cougar Cash system) --especially for Campus Department cards.
- Number: Cougar Cash Card Number
- Debit Account (T-Out): "None"
- Debit Dept (T-Out): "None"
- Tax Region: "None" -- POS will determine taxability and sales tax amount.

**Business - Non-Taxable:** BYU external, non-taxable, customers who want to receive a monthly billing statement. Generally, wholesalers (Customers: Freedom Festival, Reams).

**These businesses must** be approved by the Dining Controller. The desire is to limit use of this type because of cost to process these receivables through University General Receivables department. Should be high volume customers with weekly orders and aggregate yearly sales greater than \$10K.

**Customers must submit the TC 721 and it must be on file with Dining Services Assistant Controller.**

Setup:

- Other Name(s): Customer Utah Sales Tax Id.
- Debit Account (T-Out): "1210 - Off Campus Receivable"
- Debit Dept (T-Out): "CC10233 - DS Accounting"
- Tax Region: "Non-Tax"

**Direct Order Journal Account:** High volume customers ordering directly through Eatec Quick Order function that are billed via Journal Entry. **These customers must be approved by Dining Accounting.** Should be high volume customers with weekly orders and aggregate yearly sales greater than \$10K. Current Customers: Aspen Grove, BYU Store.

Setup:

- Debit Account (T-Out): Campus account to charge. Customer must provide.
- Debit Dept (T-Out): Campus cost center to charge. Customer must provide.
- Tax Region: "Non-Tax"

**Campus Journal Account (non-Card):** BYU entities that are charged via Journal Entry (Not a Cougar Cash or Campus Department card). **These customers must be approved by Dining Accounting.** Current customers: Sports Campus, FSU, etc.

**Setup:**

- Debit Account (T-Out): Campus account to charge. Customer must provide.
- Debit Dept (T-Out): Campus cost center to charge. Customer must provide.
- Tax Region: "Non-Tax"

**OnDemand:** Customers created through the online ordering process--OnDemand. This is a temporary customer type. Dining Accounting will review and validate entered information (Church unit number, Bishop information, Campus Department card data, etc.).

**Additional Info Required:** Only used when the Cougar Cash customer does not know their card number at time of ordering. This is a temporary customer type. Encourage to obtain card number before completing the order

### Creating New Customers During the Ordering Process

Customers in Eatec are used in two major modules--- Quick Orders and Sales Orders. **Every person or entity that orders through a Quick Order or Sales Order must have a unique customer in Eatec.** There will be no generic customers created. This will enable BYU to use targeted marketing to reach out to previous customers inviting them to order again.

#### 1. Navigate to Sales or Quick Order

- While entering an order in Eatec, customer can be created on the fly
- If entering Quick Orders, Click Sales -> Quick Orders
- If entering Sales Orders, Click Sales -> Sales Orders
- Creating new customers is the same process through QO's and SO's

#### 2. Create a new order

- Select the 'Create New' button in the top right corner

#### 3. Select or add a customer

- While filling out the order select the 'Customer\*' field.
  - This field is unavailable in QO's until the location is selected
- Search for the customer's name. If the customer does not appear in the search, select 'Add New Customer' at the bottom of the search results.

#### 4. Enter Customer Information

- A 'Create Customer' pop-up will appear
- Enter the Customer's Name
  - This will be the name of the person ordering, name of Ward/Stake, name of business, or name of BYU department
  - The First and Last name fields should be the bishop or stake president for wards & stakes. For all other customers, first and last name is optional.
- Enter the Customer's Type. The customer type dictates how we are billing the customer and how they are set up.
  - See instructions above for determining how to assign customer types.

- If the new customer is setup as 'Ward & Stakes', contact the assistant Dining Controller to validate church information
  - Enter the Number
    - Only Wards & Stakes and Cougar Cash types will have an inputted number. For the other types, Eatec will generate a number.
  - Enter a phone number in 'Phone 1' and an email in the email field
  - Address is optional. The order will pull through the address entered into the quick order, not the customer's address.
  - All other fields are optional.
  - Do not enter any information under the 'Settings' tab
- 5. Enter Customer Contacts**
- If the customer has any contacts, then select the 'Contact' tab to select a contact or add a contact
    - Contacts should be used if someone is ordering on behalf of the customer and to populate the delivery address for orders. For example, if a ward clerk is ordering for a Ward, his information would be added under Contact.
- 6. Continue creating the order**
- Customer creation is complete, for additional information or reviewing more information, go through the customer module to view customers

## Creating New Customers Through Customer Module

If a customer is not created while entering a customer, it can be created through the customer module.

- 1. Navigate to Customers**
  - Click Masters -> Customers
- 2. Create a new customer**
  - Select the 'Create New' button at the top right of the screen
- 3. Enter Customer Information**
  - Enter the Customers Name
    - This will be the name of the person ordering, name of Ward/Stake, name of business, or name of BYU department
    - The First and Last name fields should be the bishop or stake president for wards & stakes. For all other customers, first and last name is optional.
  - Enter the Customer's Type. The customer type dictates how we are billing the customer and how they are set up.
    - The various customer types are defined above. See definitions to determine which customer type should be assigned to the customer.
  - Enter the Number
    - Only Wards & Stakes and Cougar Cash types will have an inputted number. For the other types, Eatec will generate a number.
- 4. Enter Billing Address & Comms**
  - Enter a phone number in 'Phone 1' and an email in the email field
  - Enter the customer's address
  - All other fields are optional.
  - Do not enter any information under the 'Settings' tab
- 5. Save the Customer**
  - Select the 'Save' button at the top right

**6. Enter Additional Information**

- Once the initial customer has been created and saved, Contact List and Other Fields will become editable
- Select a customer, click Edit

**7. Enter Contact List**

- If the customer has any contacts, then select the 'Contact' tab to select a contact or add a contact
  - Contacts should be used if someone is ordering on behalf of the customer and to populate the delivery address for orders. For example, if a ward clerk is ordering for a Ward, his information would be added under Contact.

**8. Enter Other Fields**

- Depending on the customer type, setup for the accounts may differ.
- See definitions and setup instructions in the definition section above.

**9. Save the customer**

- Select 'Save' at the top right

**Food To-Go and Catering Review of Customer Setup**

Every day, BYU Food To-Go and Catering will review customers with the type 'Additional Information Required'. It is the responsibility of each area to get the appropriate Cougar Cash card number. Once the card number is obtained, change customer number to Cougar Cash card number and the type to Cougar Cash

**Dining Accounting Review of Customer Setup**

Outline below are the responsibilities of Dining Accounting for setting up and review customers:

- Review and validate customer information setup by Food-To-Go, Catering or OnDemand.
  - Daily lookup "OnDemand" and "Additional Info Required" customers. Filter by customer type. BYU's expectation is to have no "OnDemand" or "Additional Info Required" customers in the system.
    - Note: OnDemand Cash Customers will automatically be set with Cash/Credit Customer type.
  - For Cougar Cash & Ward "OnDemand" customers:
    - Validate customer number using Atrium (Cougar Cash) or Church Unit Directory (Wards).
    - Enter actual Cougar Cash card name and Ward name as it appears in Atrium/Church Directory.
      - For Wards, enter the bishop's name into the First and Last name fields
    - Enter into "Billing Address & Comms" section:
      - For Cougar Cash card owner name, phone, email.
      - For Ward, enter Bishop's name, phone, and email.

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