Creating a new Customer

Step 1 Searching the Customer on the system

- **U.F.S XX AR Manager > Customers > Standard**
- Complete the ***Customer*** field (use a % at the end of the customer name to help with your search) and click **Go,** no results should be found
- Click **Create**

Step 2 Creating the new Customer

- Complete the ***Organization Name*** with the customer name ensuring that the naming convention is adhered to (refer to customers reference material)
- Populate ***Classification*** from the drop down menu
- Ensure ***Account Type*** is **External**
- Complete the ***Account Site Address*** section with all relevant details
- In the ***Business Purposes*** section
    - ***Purpose*** should default in with **Bill To**
    - Enter ***Location*** prefixed with your department code e.g. XX – St Ives
- Click **Apply**

Step 3 Entering new customer information

- Click on the **Profile** tab
- Update the ***Customer Category*** field using the drop down menu
- Click **Save**
- Click on the **Accounts** tab
- In the ***Sites*** section, click on the **Details** icon for the address you created in step 2
- Click on the **Communication** tab, **Create Contact**
- Complete relevant information. If contact name is not known, enter **Accounts Payable** in the ***Last Name*** field
- Click on **Apply**
- Click on the **Business Purposes** tab
- Click on the **Details** icon for the location you set up in step 2
- Complete the ***Sales Person*** (enter your department code and tab) and **Quick Select** relevant name
- Enter ***Payment Terms*** of **30 days net**
- Complete **Contact** details by clicking on the **magnifying glass**, **Go, Quick Select**
- Click on **Apply**
- Click on the **Profile** tab. System will advise that profile does not exist at site level. Click on **Yes**
- Amend **Profile Class** to (XX External Customer). Another message will display prompting you to confirm you want to change the profile class. Click **Yes**
- Check that ***Collector*** has populated with your **department,** a tick has populated for ***Send Statement, Send Credit Balance, Send Dunning Letters***
- Click on **Save**

Step 4	Completing Tax Profile

	• Click on **Tax Profile** (top right of screen!)
	• **Tick** the ***Allow Tax Applicability*** box
	• Check that
	    ○ ***Rounding Level*** is **Header**
	    ○ ***Rounding Rule*** is **Nearest**
	• Click on **Add Another Row** at the bottom left of the screen
	• In the ***Operating Unit***, enter **Cambridge** and tab. Cambridge University should populate.
	• For the ***Account Number*** field click on the **Magnifying Glass, Go** and **Quick Select** the account number listed for this customer
	• Manually type in the **Tax Registration Number.** This is important for EC customers
	• Check that the ***Rounding Level*** is **Header** and the ***Rounding Rule*** is **Nearest**
	• Complete the ***Tax Classification*** by clicking on the **Magnifying Glass, Go** and **Quick Select** the code relevant to the customer (do not use adhoc tax codes)
	• Click **Apply, Apply** and **Apply!**
	
	The search screen will display as per step 1 and the new customer can now be used for your department.

Don’t forget – you can always **use the Central Service** to set up and amend customers.

Please see the forms section on the Finance Division website or contact Credit Control
http://www.finance.admin.cam.ac.uk/staff-and-departmental-services/forms