

Creating a new site for an existing customer

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 <u>Credit Control</u> <u>http://www.finance.admin.cam.ac.uk/staff-and-departmental-services/forms</u>

If the customer was originally created in your department

If your customer changes their address it is **not** possible to amend the existing address line in CUFS. This is to ensure that a clear audit trail is maintained.

The correct procedure is to create an **additional site** by creating a **new address line** within the **same customer record**. You **should not** create a brand new customer as this will duplicate the customer on the system.

Navigate: C	Customers \rightarrow	Standard
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a) Enter search criteria (e.g. customer name) and click on **Go.**

This will retrieve the customer's existing details.

Search									
Simple Search									
c	ustomer HELE	NS BOOKS		Contact	t First Name	e			
Re	gistry ID			Contac	t Last Name	e			
Account	Number			Contact Pho	ne Numbe	r			
Account De	scription			Ad	dress Line :	1			
Tax Registration	Number			Ad	dress Line i	2			
Tax	ayer ID				City	У			
D-U-N-S	Number				State	e			
S	IC Code		24	Q I	Postal Code	e			
Accou	int Type	-			County	Y			
Custon	ner Class		-		Province	e			
Customer C	ategory		ы	Q	Country	У			•
R	eference				Statu	s Active	•		
	Go Cl	ear							
Create									
Select Name	Registry ID	D-U-N-S Num	iber A	ddress			Country	Primary URL	Status
HELENS BOOKS	704375		1	ANY STREET, CAMB	RIDGE, CB	21 1TS	United Kingdom		Active
Accounts									
Status Active Go	•								
Create Account									
Account Acco Number Desc	unt ription	Profile Class I	Primary	Bill-To Address		Status Det	ails		
201943		DEFAULT 1	1 ANY STI 1TS	REET , CAMBRIDGE ,	CB21	Active	—		

b) Click on the customer's account **Details** icon.

This will take you to the *Customers Information* screen where you can create another site for your existing customer.



c) Click on the **Create site** button.

This will allow you to add the new address details of the new site.

balate Account 201943 Cancel Save Apply Cancer Information Name HELENS BOOKS Customer Type ORGANIZATION Registry 1D 704375 Cocount Account Number 201943 Account Description Classification Standard Corporate Account Type External Account Type External Account Type External Additional Classification Information Copy Invoice required Expenditure Category Amount Sites Account Profile Profile Amounts Communication Account Sites Active Status Active Purpose Status Active Status Active Create Site Create Site Address Image Amount Communication Create Site Address Address MailSop Country MailSop Country Purpose Operating Unit Site Number Go Create Site Address MailSop Country MailSop Country Purpose Operating Unit Site Number Go Create Site Address MailSop Country Purpose Operating Unit Site Number Go Create Site Address MailSop Country Purpose Operating Unit Site Number Go Create Site Address MailSop Country Purpose Operating Unit Site Number Go Create Site Address MailSop Country Purpose Operating Unit Site Number Go Create Site Address MailSop Country Purpose Operating Unit Site Number Go Create Site Address MailSop Country Purpose Operating Unit Site Number Go Create Site Address MailSop Country Purpose Operating Unit Site Number Go Create Site Address MailSop Country Purpose Operating Unit Site Number Go Create Site Create Site Create Site MailSop Country Purpose Operating Unit Site Number Go Create Site Create Si	Customers >						
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	1 ANY STREET, CAMBRIDGE, CB21 1TS	United Kingdom	Bill To	Cambridge University	668589	Active 📃	1
Cancel Save Apply					Can	cel Save	Apply

d) Click on Create Address

Customers > Customer Account >			
Create Account Site			
			Cancel Continue
Customer Information			
Name HELENS BOOKS	Registry ID 704375	i	
Address			
Cour	ntry 🛛 🖄	2	
Purp	ose	-	
	Go		
All Addresses			
Create Address			
Select Address	Country	Identifying	Purpose
No results found.			
			Cancel Continue

e) Now populate your new address details followed by the *Bill to* details as shown in step 1 of creating a new customer.

Customers > Custom	ner Account >							
Create Account Site								
						Cancel	Back	Finish
Customer Account I	Information							
Organization Name	IELENS BOOKS					Registry ID	704375	
Account Site Addres								
Account Site Audre.								
		* (Country	United	Kingdon	n 🚽 🔨		
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		То	wn/City	Cambri	idge			
			County					
		Post	tal Code	CB21 1	TS			
	Ad	ddress Des	cription					
		Ac	Idressee					
				🗆 Ide	ntifying	Address		
Context Value	•							
Assessed City Dataila	-							
Account Site Details	•						_	
	Operating Unit	Cambridg	je Univers	sity		Reference	e	
	Category	-						
	Territory	-		_				
	Translation			_				
	EDI Location							
		Conte	ext Value					•
Business Purposes								
Context Value	Context Value					-		
Purpose	Location	F	Sill To Lo	cation	Prima	y Remove		
Bill To 👻	AG - CAMBS2					Î		
Add Another Row								•
						Cancel	Back	Finish

f) Click Finish.

g) To complete the remainder of the setup, complete steps 3-6 of the creating a customer.

If the customer has been created by another department

You can identify if a customer has been already set up in another department in two ways:

(i) If there is no Bill-to address when you search the customer as seen below; and(ii) If you click on the details icon and no visible address is present.

Customers							
		Custome	r Type	Organization 🔻			
Search							
Simple Search							
Customer	helens books%			Contact First Nam	1e		
Registry ID				Contact Last Nam	1e		
Account Number			C	ontact Phone Numb	er		
Account Description				Address Line	1		
Tax Registration Number				Address Line	2		
Taxpayer ID				Cit	ty		
D-U-N-S Number				Sta	te		
SIC Code		ы	9	Postal Cod	le		
Account Type	-			Count	ty		
Customer Class		-		Provinc	ce		
Customer Category		ы	0	Countr	ту		•
Reference				Statu	us Active 🔻		
Go	Clear						
Create							
Select Name	Registry ID	D-U-N-S Num	iber	Address	Country	Primary URL	Status
HELENS BOOKS	704375			tester	United Kingdom		Active
Accounts							
Status Active 🔻							
Go							
Create Account		_					
Account Account		Primary Bi	ill-To				
Number Description	Profile Cla	ss Address		Status Detai	ils		
201943	DEFAULT			Active 📃			
			-				

- a) Click on the **Details** icon **DO NOT** click on Create Account as this will duplicate the customer record.
- b) Click on Create Site. Proceed to either step c or d.

c) If the address you are wishing to add is the same as the original department

- i. Click **Continue.** This will display the 'Create Account Site' page.
- ii. Complete the Business Purposes section

iii. Cli	ck on Finish				
Business Purp	oses				
Context Value	▼ Context Value			•	
Purpose	Location	Bill To Location	Primary	Remove	
Bill To	LB - BECKYS				
Add Anothe	er Row				
					Cancel Back Finish

iv. Complete the following aspects as you would for a new customer:

- Customer category
- Departmental customer contacts
- Departmental salesperson, payment terms and contact details
- Departmental profile tab
- Tax profile

c) If the address you are wishing to add differs from the original department

- i. Click on **Create Address** and follow steps as you would for a new customer:
 - Account site address
 - Account site details
 - Business purposes
 - Customer category

And then add the information as per iv above.