



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

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: Customers → Standard

a) Enter search criteria (e.g. customer name) and click on **Go**.

This will retrieve the customer's existing details.

Select	Name	Registry ID	D-U-N-S Number	Address	Country	Primary URL	Status
	HELENS BOOKS	704375		1 ANY STREET, CAMBRIDGE, CB21 1TS	United Kingdom		Active

Account Number	Account Description	Profile Class	Primary Bill-To Address	Status	Details
201943		DEFAULT	1 ANY STREET , CAMBRIDGE , CB21 1TS	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.

Customers >
Update Account: 201943

Cancel Save Apply

Customer Information
Name **HELENS BOOKS** Customer Type **ORGANIZATION**
Registry ID **704375**

Account
Account Number 201943 Sales Channel
Account Description Reference 905607
Classification Standard Corporate Status Active
Account Type External
Additional Classification Information Other
Other Customer Context
Show Payroll Data (Y/N)?
Copy Invoice required
Expenditure Category
Amount

Sites Account Profile Profile Amounts Communication

Account Sites
Status Active Purpose
Operating Unit
Address Line 2 Site Number
State Address Line 1
Country City
Go

Create Site

Address	Mailstop	Country	Purposes	Operating Unit	Site Number	Status	Details	Remove
1 ANY STREET, CAMBRIDGE, CB21 1TS		United Kingdom	Bill To	Cambridge University	668589	Active		

Cancel Save Apply

d) Click on **Create Address**

Customers > Customer Account >
Create Account Site

Cancel Continue

Customer Information
Name **HELENS BOOKS** Registry ID **704375**

Address
Country
Purpose
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 > Customer Account >
Create Account Site

Cancel Back Finish

Customer Account Information

Organization Name **HELENS BOOKS** Registry ID **704375**

Account Site Address

* Country United Kingdom
* Address Line 1 2 Any street
Address Line2
Address Line3
Town/City Cambridge
County
Postal Code CB21 1TS
Address Description
Addressee
 Identifying Address

Context Value

Account Site Details

Operating Unit Cambridge University Reference
Category
Territory
Translation
EDI Location
Context Value

Business Purposes

Context Value Context Value

Purpose	Location	Bill To Location	Primary	Remove
Bill To	AG - CAMBS2		<input type="checkbox"/>	

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.

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. Click on **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.
