Adding a new site to an existing Customer

Step 1 Searching for the existing customer

- **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**
- **Select** the correct customer using the radio button
- If there is an ***Account Number*** but no ***Primary Bill-To Address*** in the ***Accounts*** section then you can create a site for your department without duplicating the customer.

Step 2 Adding a new site to an existing customer

- Click on the **Details** icon in the Accounts section
- Click on **Create Site** in the Accounts Sites section
- Two options:
  - If you wish to use the existing address click **Continue.** In the **Business Purpose** section, **purpose** should default with **Bill To.** Complete the **Location field** with your department code and part of the customer address
  - To add a new address click on **Create Address** and populate the address details followed by the **Bill To. Location** field details with your department code and part of the customer address
- Click **Finish**

Step 3 Adding the detailed site information

- Click on the **Communication** tab.
- Click on **Create Contact.** 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.
- Complete ***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!)
- The following fields should populate with the correct information:
    - ***Allow Tax Applicability*** box should default with a tick
    - ***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 existing 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