# 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.

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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**