## 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.

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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**