



Searching for Customers

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>

Navigate: Customers → Standard

In the **Search** window that is displayed enter your search parameters into the appropriate fields. However, ensure that you do not use wildcard (%) as the first character.

For example:

- Enter the customer's name (in full or in part) in the **Customer** field.
- Then click **Go**.

Customers

Customers

Customer Type Organization

Leave the type as Organization

Search

Simple Search

Customer Helen%

Registry ID

Account Number

Account Description

Tax Registration Number

Taxpayer ID

D-U-N-S Number

SIC Code

Account Type

Customer Class

Customer Category

Reference

Contact First Name

Contact Last Name

Contact Phone Number

Address Line 1

Address Line 2

City

State

Postal Code

County

Province

Country

Status Active

Go Clear

Create

Select Name	Registry ID	D-U-N-S Number	Address	Country	Primary URL	Status
No search conducted.						

Accounts

Status Active

Go

Create Account

Account Number	Account Description	Profile	Class	Primary Bill-To	Address	Status	Details
No results found.							

Any customer containing the words you have searched will be displayed – the search is not case sensitive. However if there is no match, it will show you **'No Results Found'**.

Go Clear

Create

Select	Name	Registry ID	D-U-N-S Number	Address	Country	Primary URL	Status
<input checked="" type="radio"/>	HELENS BOOKS	704375		1 ANY STREET, CAMBRIDGE, CB21 1TS	United Kingdom		Active
<input type="radio"/>	HELENS HOME	704356		GREENWICH HOUSE, MADINGLEY ROAD, CAMBRIDGE, CB1 2TS	United Kingdom		Active
<input type="radio"/>	HELENS HOMES	704357		1, 1	United Kingdom		Active
<input type="radio"/>	Helenswood School	266756		The Ridge, Hastings, East Sussex, TN37 7PS	United Kingdom		Active
<input type="radio"/>	HELENSWOOD SCHOOL (JR 9704)	38825		The Ridge, Hastings	United Kingdom		Active

Accounts

Status: Active

Create Account

Account Number	Account Description	Profile Class	Primary Bill-To Address	Status	Details
201943		DEFAULT		Active	

Select the relevant customer from the results list and look at the accompanying display in the **Accounts** section at the bottom of the screen.

- If the **Primary Bill-To Address** field is blank then the customer has been set up previously in the University but it has not been allocated to your department.
- If the customer has already been set up for your department then the address will be displayed.

The **Account Number** displayed is the customer number

Accounts

Status: Active

Create Account

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