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

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.

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’.
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.