Creating a new site for an existing customer

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

Creating a new site

If your customer changes their address it is **not** possible to amend the existing address line in CUFS. This is to ensure that a clear audit trail is maintained.

The correct procedure is to create an **additional site** by creating a **new address line** within the **same customer record**. You **should not** create a brand new customer as this will duplicate the customer on the system.

**Navigate: Customers → Standard**

a) Enter search criteria (e.g. customer name) and click on **Go**. This will retrieve the customer’s existing details.

b) Click on the customer’s account **Details** icon. This will take you to the **Customers Information** screen where you can create another site for your existing customer.
c) Click on the **Create site** button. This will allow you to add the new address details of the new site.

![Create site button](image1)

d) Click on **Create Address**

![Create Address button](image2)

e) Now populate your new address details followed by the **Bill to** details as shown in step 1 of creating a new customer.
f) Click Finish.

g) To complete the remainder of the setup, complete steps 3-6 of the creating a customer.