Searching for Customers

You should use the **Central Service** to set up and amend customers.

Please see the forms section on the Finance Division website or contact [Credit Control]

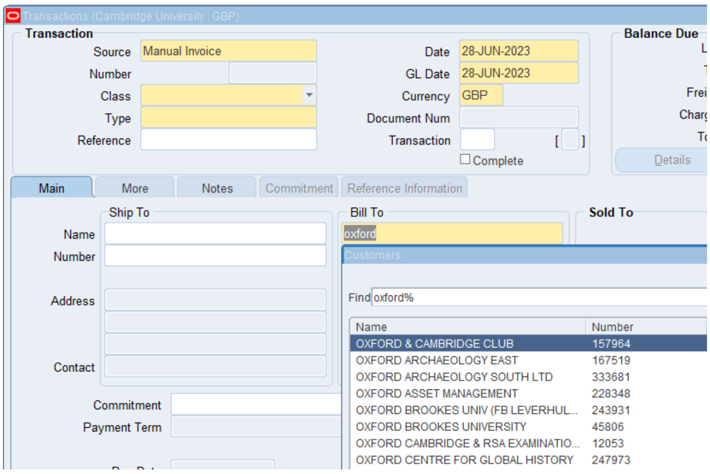
http://www.finance.admin.cam.ac.uk/staff-and-departmental-services/forms

Navigate: AR responsibility > Transactions

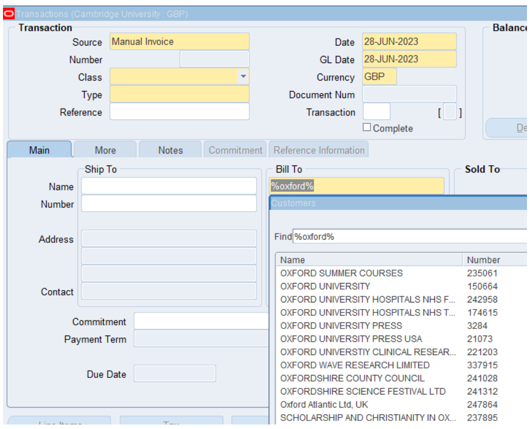
The transactions screen will only display active customers. If the required customer is not on the list, a set up or amendment request should be made to the Central Credit Control team for action.

In the **Bill To** field enter the customer name and **Tab**

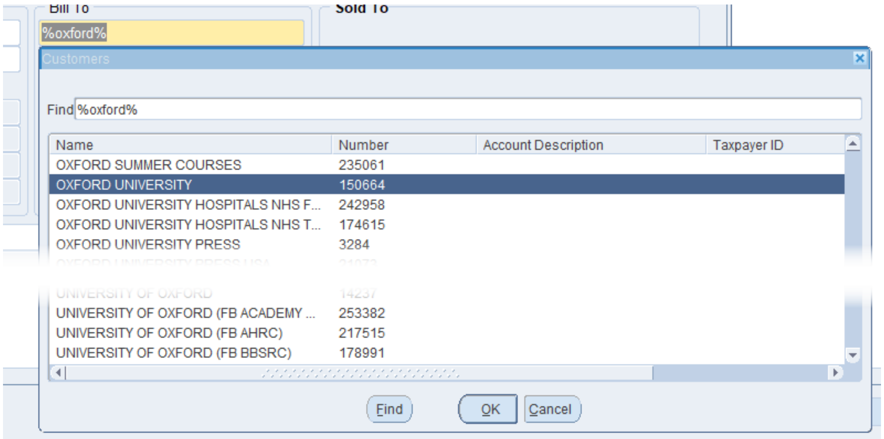
A list of possible customers with this content at the start will display.



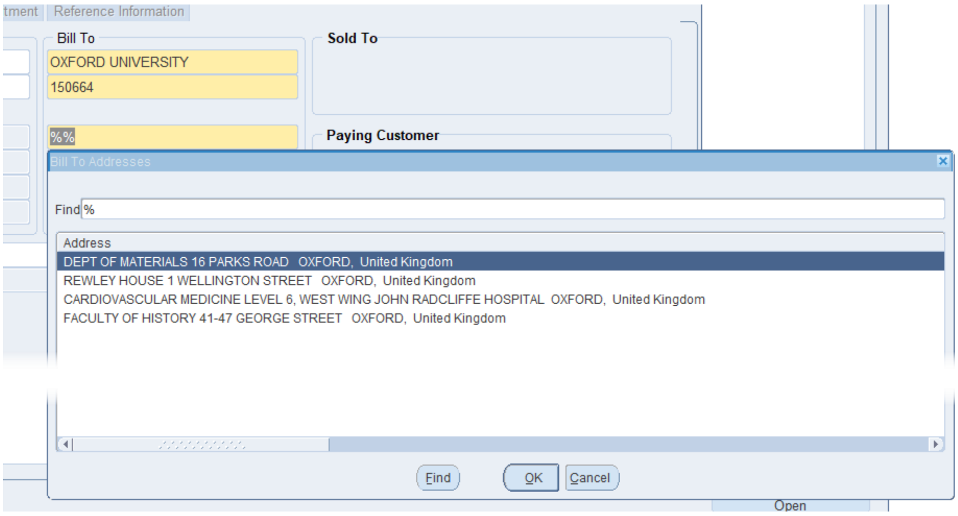
Using the wildcard (%) at the start and end, will bring up a list of customers with that content anywhere in the name.



Select the required customer and then ok to load the details.



The primary address will pull through into the address field, if this is not correct a full list of addresses can be displayed by entering **%%** into the first address field, then **Tab** to display the list.



If the required customer does not display or the details are incorrect, complete the [Customer set up form]() from the Finance Division website and email it to the [Credit Control team]().