



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.

The screenshot shows the 'Transactions' screen with the 'Bill To' field containing 'oxford'. A dropdown list of customers is displayed below the field. The list includes the following entries:

Name	Number
OXFORD & CAMBRIDGE CLUB	157964
OXFORD ARCHAEOLOGY EAST	167519
OXFORD ARCHAEOLOGY SOUTH LTD	333681
OXFORD ASSET MANAGEMENT	228348
OXFORD BROOKES UNIV (FB LEVERHUL...	243931
OXFORD BROOKES UNIVERSITY	45806
OXFORD CAMBRIDGE & RSA EXAMINATIO...	12053
OXFORD CENTRE FOR GLOBAL HISTORY	247973

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

The screenshot shows the 'Transactions' screen with the 'Bill To' field containing '%oxford%'. A dropdown list of customers is displayed below the field. The list includes the following entries:

Name	Number
OXFORD SUMMER COURSES	235001
OXFORD UNIVERSITY	150064
OXFORD UNIVERSITY HOSPITALS NHS F...	242958
OXFORD UNIVERSITY HOSPITALS NHS T...	174615
OXFORD UNIVERSITY PRESS	3284
OXFORD UNIVERSITY PRESS USA	21073
OXFORD UNIVERSITY CLINICAL RESEAR...	221203
OXFORD WIRE RESEARCH LIMITED	337915
OXFORDSHIRE COUNTY COUNCIL	241028
OXFORDSHIRE SCIENCE FESTIVAL LTD	241312
Oxford Atlantic Ltd, UK	247864
SCHOLARSHIP AND CHRISTIANITY IN OX...	237895



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

Name	Number	Account Description	Taxpayer ID
OXFORD SUMMER COURSES	235061		
OXFORD UNIVERSITY	150664		
OXFORD UNIVERSITY HOSPITALS NHS F...	242958		
OXFORD UNIVERSITY HOSPITALS NHS T...	174615		
OXFORD UNIVERSITY PRESS	3284		
UNIVERSITY OF OXFORD	14237		
UNIVERSITY OF OXFORD (FB ACADEMY ...	253382		
UNIVERSITY OF OXFORD (FB AHRC)	217515		
UNIVERSITY OF OXFORD (FB BBSRC)	178991		

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.

Address
DEPT OF MATERIALS 16 PARKS ROAD OXFORD, United Kingdom
REWLEY HOUSE 1 WELLINGTON STREET OXFORD, United Kingdom
CARDIOVASCULAR MEDICINE LEVEL 6, WEST WING JOHN RADCLIFFE HOSPITAL OXFORD, United Kingdom
FACULTY OF HISTORY 41-47 GEORGE STREET OXFORD, United Kingdom

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](#).