NEW CUSTOMER CREATION: SEARCH TIPS

Before requesting a new customer or a new customer location, complete both a PeopleSoft Customer Account Search and a Google internet search. This prevents duplication of customer accounts and inaccurate customer information.

STEP ONE: PEOPLESOFT CUSTOMER ACCOUNT SEARCH

- In PeopleSoft go to “Customers – Customer Information – General Information – Find an Existing Value”
- Search for each of the following items one at a time:
  - Name 1: enter the first word in the customer’s name
  - Name 1: change “begins with” field to “contains” and enter a key word from the customer’s name
  - City: enter the city
  - State: enter the state
  - Postal Code: enter the postal code
• If your new customer is part of an association, or larger corporation search using both the association/corporation name as well as the name given by your customer

• All results will appear below your search screen – be sure to look through all results comparing the customer names and addresses

• If a current customer with a similar name or address comes up during your search, it is your responsibility to find out if this is the same as the customer you are invoicing.

• The following examples explain possible situations you may find and the appropriate solution:
  o Example: Current customer name is similar to new customer name and address is the same
    Solution: Research the correct customer name and let the Integrated Service Centre know if a change is required
  o Example: Current customer name is the same as new customer name but address is different
    Solution: add a location to the current customer
  o Example: Current customer name is similar to new customer name but address is different
    Solution: research correct customer name and address using Google search and double check with your customer
  o Example: Current customer information has incorrect spelling or address error
    Solution: Contact the Integrated Service Centre with customer name and number to have the error corrected
STEP TWO: GOOGLE CUSTOMER VERIFICATION SEARCH

• Most potential customers can be found on the web via the company website or a Google search

• This tool is used for the following:
  o To verify correct legal name
  o To verify correct customer address
  o To verify that the customer is independent and is not a sub-division or part of a larger organization

• Using Google search:
  o Enter the main words in the customer’s name or company acronym
  o Do not enter words such as “and, or, the, limited”
  o Look through results for company websites that are similar or match your customers name
  o For international companies there may be websites for different countries

  ![Google Search Example](image)

  • Once you have found the correct website look for the following areas:
    • Contact information: often there is a head office location as well as area offices
      o See if there is a Department name for the address you are looking for
    • Legal section: this link is usually in small print at the bottom of the screen or under the company information section
      o Verify the correct legal name of the customer as used in this section
    • Look for indicators that this is part of a larger corporation such as:
      o Division of “some corporation” written on the screen
      o Links to various sections of a corporation
STEP THREE: COMPARE SEARCH RESULTS FROM PEOPLESOF T AND GOOGLE

- If you have found the legal name or address is different from that you originally searched in PeopleSoft you will have to re-search using the correct legal name and address

STEP FOUR: SEARCHES ARE COMPLETE

- Once you have completed BOTH a PeopleSoft Customer Account search and a Google search on the new customer you want to add, you should have the following:
  - Correct legal name of customer
  - Correct address information for the location
  - Contact person name and phone number (if required)
  - Pertinent information regarding whether this customer is part of a larger organization or is a department within a company
  - If so, the head corporation name is to be used as the correct legal name with the department name in the location fields “Description” and “Address 1” as seen below:

![Address Locations](image-url)