

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



ORACLE

General Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

SetID: = SHARE

Customer ID: begins with

Name 1: begins with

Name 2: begins with

Telephone: begins with

City: begins with

State: begins with

Postal Code: begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

- 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

ORACLE

General Information
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

SetID: = SHARE

Customer ID: begins with

Name 1: begins with alberta association

Name 2: begins with

Telephone: begins with

City: begins with

State: begins with

Postal Code: begins with

Case Sensitive

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Search Results

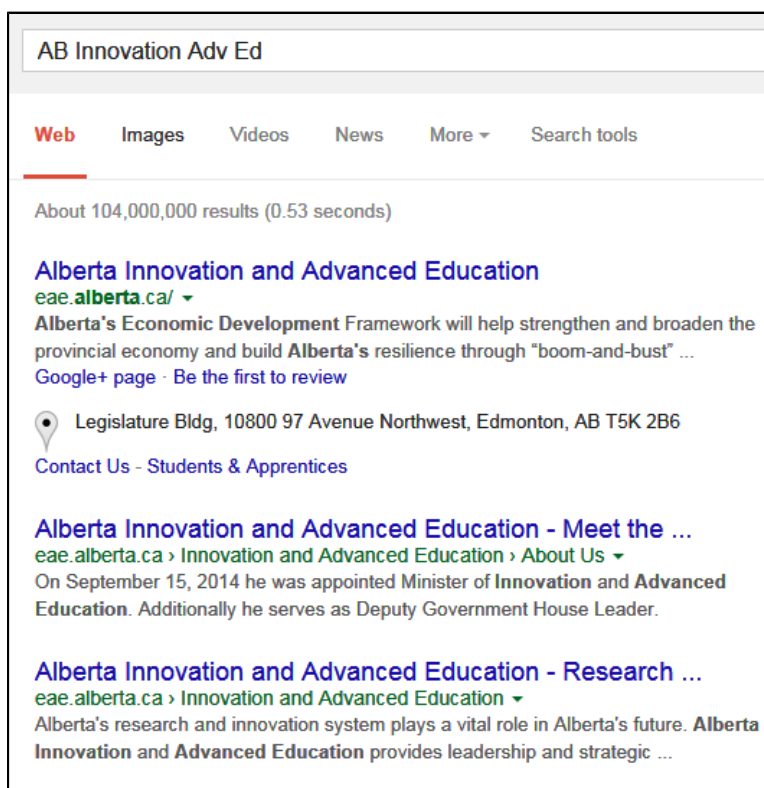
View All First 1-4 of 4 Last

SetID	Customer ID	Name 1	Name 2	Telephone	City	State	Postal Code
SHARE 00100074		Alberta Association for Community Living	(blank)	(blank)	Edmonton AB		T5G 0X5
SHARE 00106545		Alberta Association of Animal	(blank)	780/489-5007	Edmonton AB		T6H 5P9
SHARE 00105328		Alberta Association of Architects	(blank)	(blank)	Edmonton AB		T6E 4S1
SHARE 00100075		Alberta Association of Immigrant	(blank)	(blank)	Calgary AB		T2A 6T2

- 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:
 - 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
 - Example: *Current customer name is the same as new customer name but address is different*
Solution: add a location to the current customer
 - 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
 - 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:
 - To verify correct legal name
 - To verify correct customer address
 - To verify that the customer is independent and is not a sub-division or part of a larger organization
- Using Google search:
 - Enter the main words in the customer's name or company acronym
 - Do not enter words such as "and, or, the, limited"
 - Look through results for company websites that are similar or match your customers name
 - For international companies there may be websites for different countries



- 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
 - 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
 - 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:
 - Division of "some corporation" written on the screen
 - Links to various sections of a corporation

STEP THREE: COMPARE SEARCH RESULTS FROM PEOPLESOFT 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		Find View All		First 1 of 2 Last	
Location:	1	<input checked="" type="checkbox"/> Bill To	<input checked="" type="checkbox"/> Primary	<input type="checkbox"/> Broker	<input type="checkbox"/> Primary
Description:	AB Energy Research Institute	<input checked="" type="checkbox"/> Ship To	<input checked="" type="checkbox"/> Primary	<input type="checkbox"/> Indirect	<input type="checkbox"/> Primary
		<input type="checkbox"/> Sold To	<input type="checkbox"/> Primary	<input checked="" type="checkbox"/> Correspondence Address	
		<input type="checkbox"/> RFID Enabled	VAT Default	VAT Service Treatment Setup	
Address Details		Find View All		First 1 of 1 Last	
Effective Date:	2006/08/15	Status:	Active		
Tax Code:		Language Code:	English		
Physical Nature:		Where Performed:			
Alternate Name 1:	601400172	Alternate Name 2:			
Country:	CAN Canada	Street Type:			
Address 1:	AB Energy Research Institute				
Address 2:	Suite 2540, AMEC Place View Phone Information				
Address 3:	801 6th Avenue SW				
Address 4:					
City:	Calgary	<input type="checkbox"/> In City Limit			
County:		Postal:	T2P 3W2		
Province:	AB Alberta				