



# CUSTOMER MASTER SEARCH QUICK REFERENCE GUIDE

## INTRODUCTION

This guide provides USDA Financial Management Modernization Initiative (FMMI) agencies with guidance on searching for existing customer records in FMMI.

## MENU

Use the following menu path to begin a customer search:

Accounts Receivable → Customer Master Data Maintenance → Maintain Customer Master Data → Display Customer Master → Dropdown option

## CUSTOMER SEARCH CATEGORIES

The customer search categories are:

- Customers (General)
- Customers (By Company Code)
- Customers By Country
- Customers By ALC
- Customers By Tax Information
- Customers By Address Attributes
- Customers Per Account Group

## TERMINOLOGY

<b>Search Term</b>	A unique term created by the requester to make searching for a particular customer easier. It is placed in the <b>search term</b> field in FMMI.
<b>Customers (General) or Customers (By Company Code)</b>	Enables a search for a customer record by search term or customer name. The results provide search term, zip code, city, customer name, and customer code.
<b>Customers By Country</b>	Enables a search for a customer record by country code. The results provide country code, search term, customer name, city, and customer code.

<b>Customers By ALC</b>	Enables a search for a customer record by agency locator code (ALC). The results provide agency name, city, state, zip code, deletion flag, customer code, account group, and ALC. This search category is also beneficial if the ALC is unknown. Entering any other search criteria will provide the ALC in the search results.
<b>Customers By Tax Information</b>	Enables a search for a customer record by Social Security Number (SSN) or Taxpayer Identification Number (TIN). The results provide the SSN or TIN, country, vendor's name, and customer code. This search category is also beneficial if the SSN or TIN is unknown. Entering the correct name and/or any other FMMI criteria will provide the SSN or TIN in the search results.
<b>Customers By Address Attributes</b>	Enables a search for a customer record by an address attribute such as name, city, street name, or state. The results provide customer code, customer name, address, city, zip code, and search term. This search category is also beneficial if the complete address is unknown. Entering the correct name and/or a partial address attribute, e.g., zip code or city, will provide complete addresses in the search results.
<b>Customers Per Account Group</b>	Enables a search for a customer record by account group. The results provide account group, search term, zip code, account name, and customer code.

## HELPFUL HINTS

- For a more useful search selection, choose a category based upon the desired results. For example, if looking for a particular address, choose **Customers By Address Attributes** category. This category will provide a specific address in the returned results, rather than different records that must be selected individually to find the desired address.
- Determine a unique identifier. Using wildcards (asterisks) can be helpful as they allow a search on the identifier, but will include any identifier/information before or after the asterisk. For example, if the customer's last name is Goldenviz, and the first name is unknown (or vice versa), search on the name using wildcards before and after the last name (\*GOLDENVIZ\*). In this case, the search will be performed on "Goldenviz," but the results will include all possible options before and after "Goldenviz," e.g., Lisa Goldenviz or Goldenviz Brown.
- To narrow the results returned as much as possible, provide as much information as possible in the search.
- Although the Sales Org, which is only available on the Accounts Receivable tab, is not needed to search for a customer, the system may prompt you to enter the Sales Org when submitting a request via the new FMMI Preapproval Vendor Request (PVND) process. In this case, Sales Org is your agency name.

## **INQUIRIES**

Please direct any questions to the Accounting Processing Branch, Table Maintenance Section, at 504-426-5377.