



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/Company Code
- Customers By Country
- Customers By Personnel Number
- Customers By Tax Information
- Customers By Address Attributes
- Customers By Address Attributes (Fuzzy Search)

The capability exists to search by any of these categories; however, the selections that will be of most benefit are **Customers (General)**, **Customers By Country**, **Customers By Address Attributes**, and **Customers By Tax Information**.

Note: Although **Customers By Address Attributes (Fuzzy Search)** is an available search option, if selected, the session will be interrupted. If the fuzzy search is selected inadvertently, follow these steps to proceed: (1) Click inside the customer/vendor line; (2) Type = A; and (3) Press F4.

Customers (General) Enables a search by search term or customer name. The result provides search term, zip code, city, customer name, and FMMI customer code.

Customers By Country Enables a search for a customer record by country code. The result provides country code, search term, customer name, city, and FMMI customer code.

Customers By Address Attributes Enables a search for a customer attribute such as name, city, street name or state. The result provides customer code, customer name, address, city, zip code, and search term.

Customers By Tax Information Enables a search by Social Security Number (SSN) or Taxpayer Identification Number (TIN). The result provides the TIN or SSN, country, vendor's name, and FMMI customer code.

There are various ways to use the customer search categories. Multiple fields can be used within each category to search for a customer. Some choices will return negative results. Use varying search criteria until the query returns the desired results.

Note: When negative results occur consistently, it may be that the record is not yet established in FMMI.

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. If the customer's first name is Lisa and last name is Goldenviz, search on the name using a wildcard (asterisk) before and after the last name (e.g., LISA*GOLDENVIZ*).
- 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 input 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.