



**Work Instruction**

**View Customer Details**

**Purpose**

Use this procedure to view customer information such as address, contact person(s), telephone numbers, etc.

**Prerequisites**

- You have been assigned the appropriate AR responsibility (*HRVD^AR^TUB^ORG^INV*).
- Your customer has been set up in the AR system.

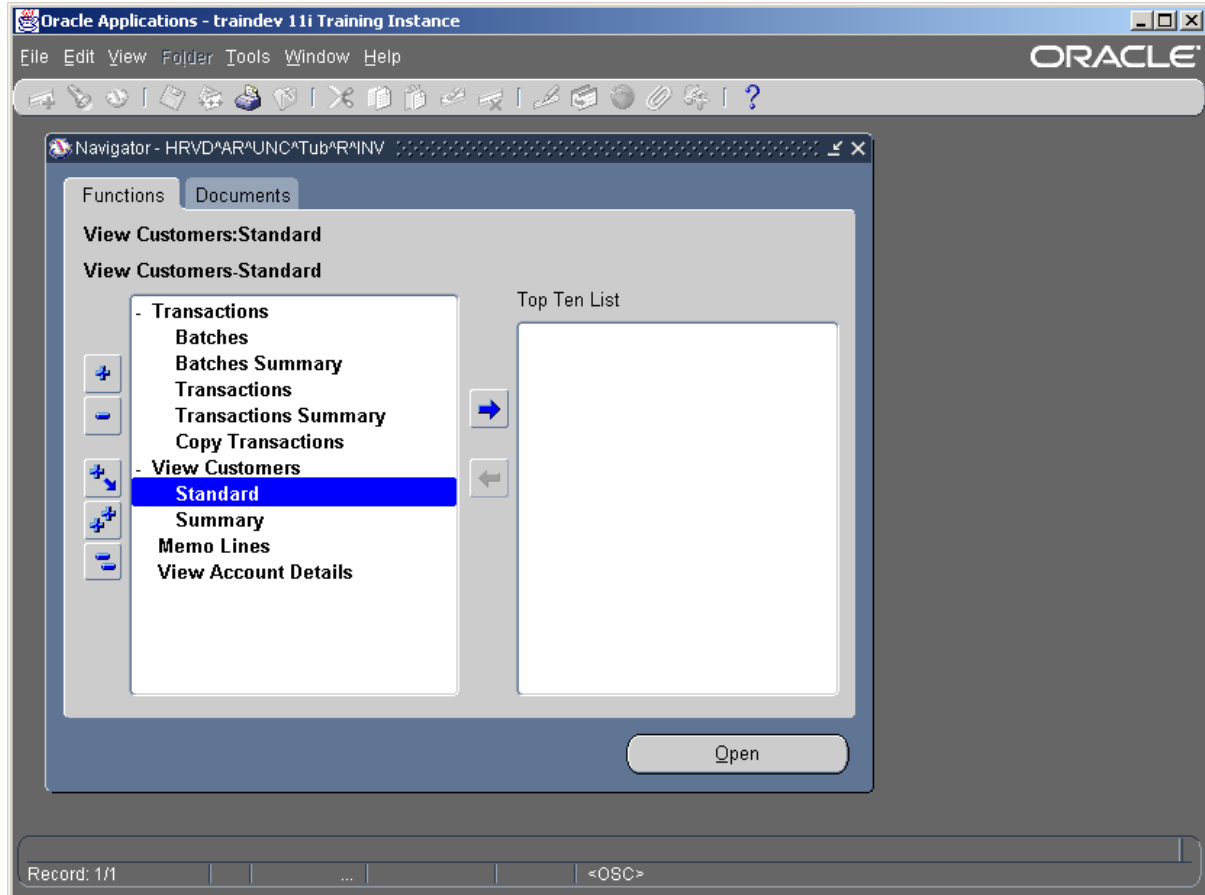
**Helpful Hints**

Use these keyboard shortcut keys to speed your work:

- %: Wildcard
- F3: Copy Field Above
- F7: Enter Query
- F8: Execute Query
- F9: View List of Values for a Field
- F10: Save

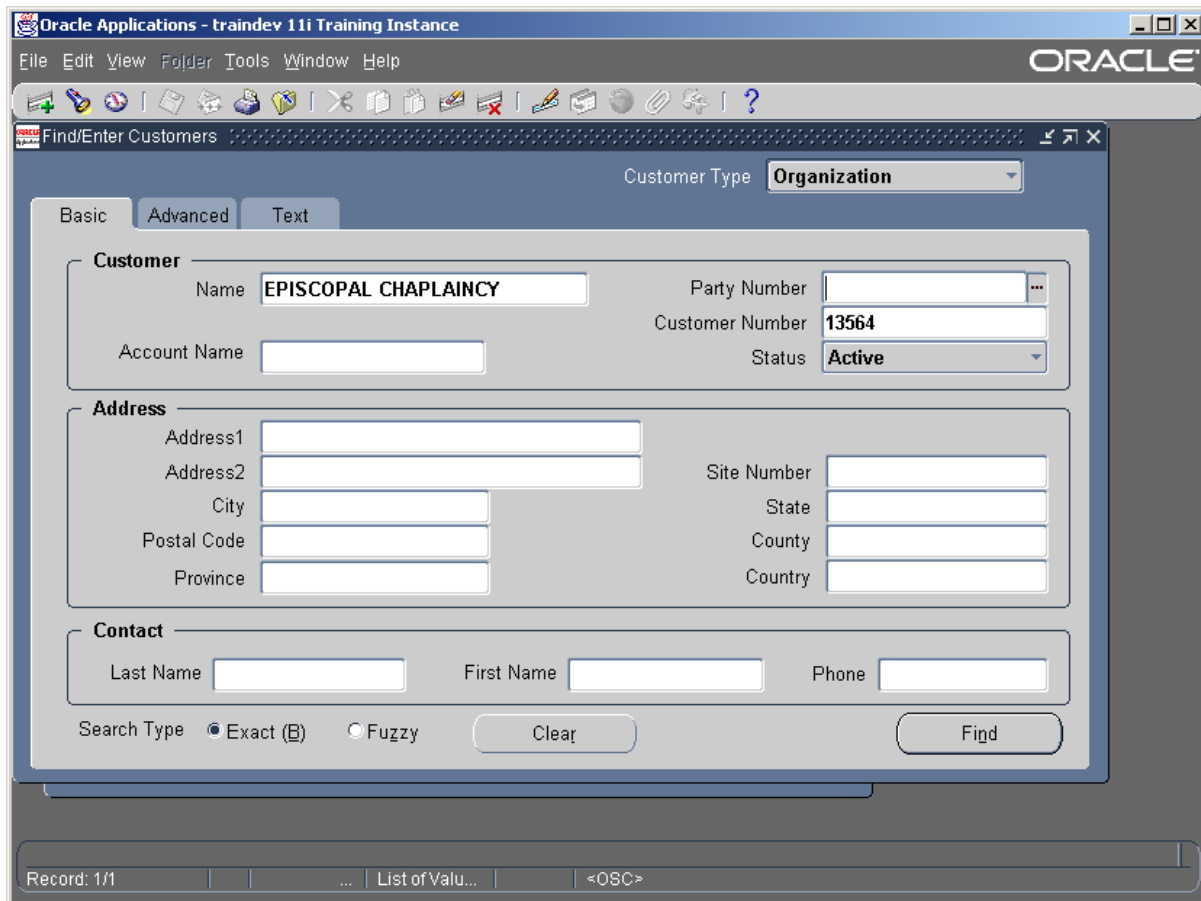
## Procedure

### Oracle Navigator



1. Click on **View Customers** → **Standard** to start this procedure.

**Find/Enter Customers**



- Under the *Basic* tab, complete one of the following optional fields to define your customer search. Although the fields are listed as optional, you must enter at least one field to begin your search. Fields not listed are not used in this search function.



Harvard is not currently using the *Text* tab. The *Advanced* tab is only used by selected local units to search by HUID (in the **Tax Reg Num** field).

In This Field	R/O/C	Enter
Customer Type	R	This field will default to <i>Organization</i> . Leave this default value.
Name	O	The customer's name
Party Number	C	This field is generally not used
Customer Number	O	The customer's number

In This Field	R/O/C	Enter
Status	R	This field will default to <i>Active</i> . Leave this default value unless you want to find all customers, inactive as well as active.
Address (Selected fields)	O	The customer address information you wish to use in your search.
Contact (Selected fields)	O	The contact information that you wish to use in your search.



You can also search for customers using the *Address* and *Contact* segments if you have that information.

3. Ensure *Exact (B)* is selected in the **Search Type** field.



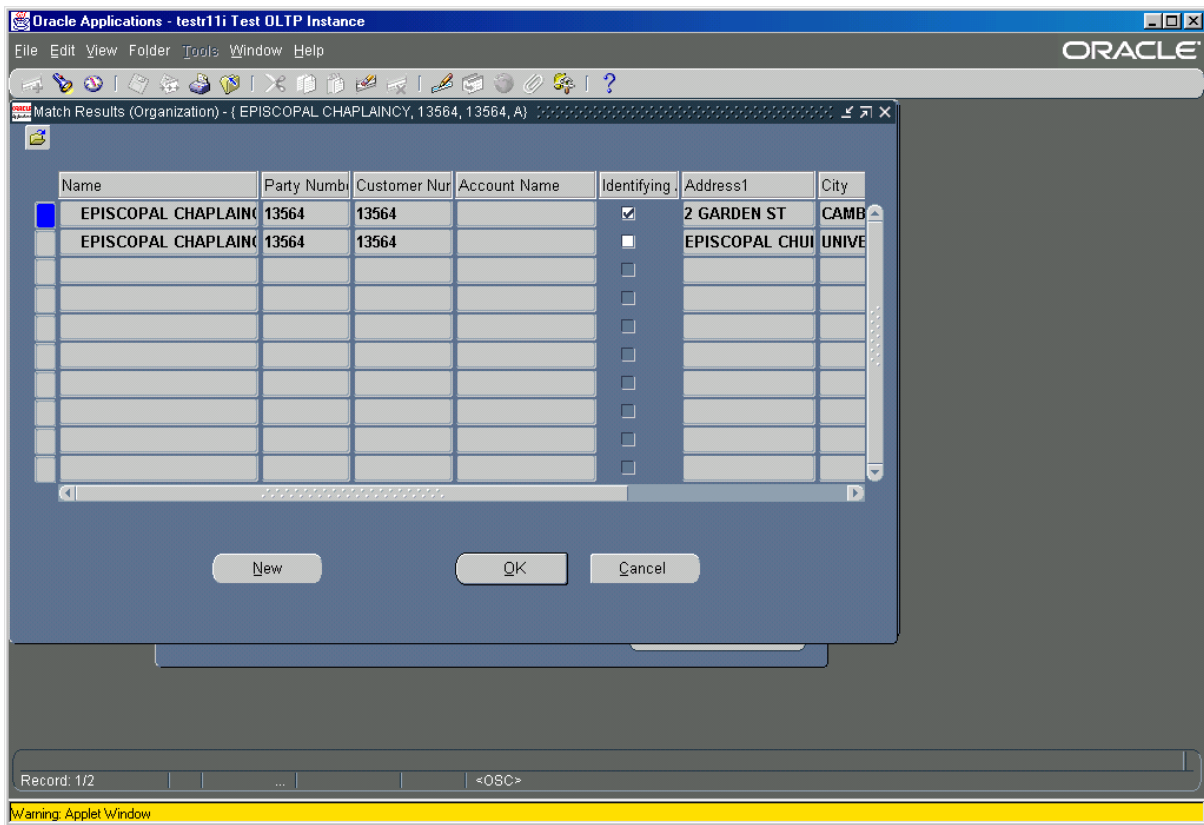
Harvard is not currently using the Fuzzy search type. Your search results will not be complete if Fuzzy search is used.

4. Click **Find** to locate customer details based on your search criteria.



Click **Clear** to clear all the fields and define a new search.

**Match Results**





5. When the screen opens, review the following fields:

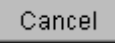



Use the scroll bar at the bottom of the list to scroll right and review all the fields available.

This Field	Shows
Name	The customer name
Customer Number	The customer number
Address 1	Line 1 of the various customer addresses in the system
City	The city in the customer address
State	The state in the customer address
Postal Code	The postal code in the customer address
Country	The country in the customer address

6. Move your cursor to any field on the line that displays the customer number you wish you view. Click  to go to the *Customers – Standard* screen and view customer contact information for the selected customer line, indicated by the blue “drill down” box .



Click  to return to the *Find/Enter Customers* screen and define a new search. The  button is not used in this function.

**Customers – Standard: Contacts Tab**

7. When the screen opens, click the **Contacts** tab and review the following fields:



Fields not listed are not used.

This Field	Shows
Last	The contact person's last name
First	The contact person's first name
Title	The contact person's title
Country Code	For international telephone numbers, the country code
Area Code	The contact's telephone area code
Telephone Number	The contact's telephone number
Extension	The contact's telephone extension number



The remaining tabs on the *Customers – Standard* screen are not used for this function.

8. You have completed this task.

### **Result**

You have reviewed customer address and contact information.