

# How to Setup a new Customer Record (Quick Customer Create)



The image shows a login form for Oracle PeopleSoft. At the top, the Oracle logo is displayed in red, with the word "PEOPLESOFT" in black below it. The form itself is a dark blue rectangle with a white header. Below the header, there are three input fields: "User ID", "Password", and "Select a Language". The "Select a Language" field is a dropdown menu with "English" selected. At the bottom of the form is a green "Sign In" button.

ORACLE<sup>®</sup>  
PEOPLESOFT

User ID

Password

Select a Language  
English ▼

Sign In

# Why Create New Customer Records

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- Customer Record does not exist in PeopleSoft
- Address in PeopleSoft has different organization name

# Quick Customer Create

Main Menu

Customers

Customer Information

Quick Customer

Create

Main Menu > Kaplan Product Web Info > Web Customers

Search Menu:

- Kaplan Restart Jobset
- Set Up Financials/Supply Chain
- PeopleTools
- Reporting Tools
- Cost Accounting
- Accounts Payable
- About Commision
- Customers**
  - Order Management
  - Quote Orders
  - DLx Processes
  - RMA
  - Billing
  - Accounts Receivable
  - Purchasing
  - Suppliers/Vendors
  - Products
  - Inventory
  - Items
  - Electronic Connections
  - Flat File Orders Processes
  - Free Goods
  - Kaplan Catalog Requests
  - Kaplan Gift Cards

**Customer Information**

- Review Customer Inform
- Reports
- Comprehensive Custom
- Contact Information
- Customer Hierarchy

System for Award Management

- Quick Customer Create**
- General Information
- Dun & Bradstreet
- Dun & Bradstreet Lookup/Order
- MICR Information
- Corporate Customer Tree
- Corporate Tree Messages
- Supplier Information
- Electronic File Transfer Name
- Reimbursable Agreements
- Kaplan Order Emails
- K Zip Territory Review
- K Zip Territory Detail
- Kaplan Customer Messages
- Customer Summary
- Customer Lookup

# Quick Customer Create

## Customer Search

SetID

Contact Name

User ID

Email ID

Contact Telephone

Credit Card Number

Customer Name

Customer ID

Customer Phone

Country  United States

Address 1

Address 2

City

State

Postal

Cust Char10 A

Cust N12.3 A

Select

Create New Customer/Contact  
customer

Search

Create New Customer/Contact



# Quick Customer Create

Enter **T** in Template Customers

Click Magnifying Glass – select appropriate Classification

Enter Contact Information

**Name**

**Email** (if available)

**Telephone**

Enter Customer Name & Address

Select Save New Customer/Contact

**Create New Customer/Contact**

SetID   Template Customer

**Enter Contact Information**

\*Name   Create

Email Address

Business Phone  Home Phone

Telephone

[Add Credit Card Information](#)

**Enter Customer Information**

\*Customer Name

Short Name

Customer ID

Cust Char10 A  Cust N12.3 A

Address Description

**Address Details**

Country   United States

Address 1

Address 2

Address 3

City

Country  Postal  Geocode: [Lookup](#)

**Look Up Template Customer**

Search Results

View 100

Customer ID	Name 1	
TAUTOWEB	Web Auto Template	(l
TAUTOXX	Donors Choose ship to	(l
TDCCH	Day Care Chain Template	(l
TDCHD	Day Care Head Start	(l
TDCIC	Day Care Independent	(l
TDCRR	Day Care Resrc & Referral	(l
TDCYY	Day Care YMCA/YWCA	(l
TGOFE	Government Federal	(l
TGOGS	Government GSA	(l
TGOML	Government Military	(l
TGOSL	Government State & Local	(l
TSCCS	School Charter	(l
TSCDP	School Public	(l
TSCHS	School Home	(l
TSCPR	School Private	(l
TVMCU	Vert Mkt Colleges	(l
TVMEA	Vert Mkt Employee	(l
TVMIN	Vert Mkt Individual	(l
TVMLI	Vert Mkt Library	(l
TVMMD	Vert Mkt Medical Facility	(l
TVMRT	Vert Mkt Retail	(l
TVMSS	Vertical Social Services	(l
TWBAT	Web Amazon Toys	(l
TWBAZ	Web Amazon	(l
TWBBY	Web Buy	(l
TWBEB	Web Ebay	(l
TWBJT	Web Jet	(l
TWBKT	Web Ktoys	(l

# Tax and Address Validation

## Tax Geocode Selection

**Select** the Tax Geocode Box

Confirm county and select appropriate if multiple counties are listed

Melissa Data (address verification)

**Select** Use Melissa Data

Tax Geocode Selection

Click the Checkbox to Select a Geocode.  Auto Fill Address

Tax Geocodes Find | View All | First 1 of 1 Last

<input type="checkbox"/>	Geocode 480730050	<input checked="" type="checkbox"/> In City Limit
	State WASHINGTON	City BELLINGHAM
		County WHATCOM

OK Cancel

MelissaData

<b>From PS</b>	<b>From Melissa</b>
Name 1 MADRONA MEDICAL GROUP	Name MADRONA MEDICAL GROUP
Address1 4545 CORDATA PKWY	Address Line 1 4545 CORDATA PKWY
Address2	Address Line 2
Address3	Address3
City Bellingham	City BELLINGHAM
State WA Postal Code 98226	State WA Postal Code 98226-7263
Loc	
Effective Date	

**Information About Address**

Current Status Address Verified to DPV

Error Message

Address Type Highrise

Status V DPV Status 9

Footnote1 AA Fn Msg1

Footnote2 N1 Fn Msg2 Apt / Suite # REQUIRED, but Missing

Footnote3 Fn Msg3

Footnote4 Fn Msg4

Footnote AAN1 RBDI B

Carrier Route C078 DP Code 99 DP Check Digit 7

Do Not Use Melissa Data

Use Melissa Data

# SUCCESSFUL Customer Record Created

New Customer Number Noted

## Customer Summary Detail

### System Messages

Successfully created new customer and contact. Here is the summary.

[Return to Search](#)



[Return to Results](#)



[Create New Customer/Contact](#)

### Contact Information

**Contact ID** 40063

[View User](#)

**Contact Name** CHARLES HARDIN

**Email ID**

**Contact Telephone** 360/738-2200

**Contact Flag** External Contact

**Contact Type**

[Contact Information Update](#)

[Order Tracking Inquiry](#)

[Customer Payment Inquiry](#)

[Return to Search](#)

### Customer Information

**Customer ID** 94280914

**Customer Name** MADRONA MEDICAL GROUP

**Address** 4545 CORDATA PKWY

BELLINGHAM

WA 98226-7263 USA

**Credit Card Type**

**Credit Card Number**

**Financial Sanctions** Review

[Create Sales Order](#)

[Billing Information Inquiry](#)

[Customer Information Update](#)



[Return to Results](#)



[Create New Customer/Contact](#)



# Things to remember:

## Customer Look Up

Look for customer number prior to setting up new customer

## Customer Order Support:

Tax exempt certificates → forward to Customer Order Support

Add Locations → forward to Customer Order Support