

Looking up/Finding a Customer

Finding existing customer accounts is extremely important, and helps us avoid having multiple accounts for the same customer. Sage is quite picky about how you search, so searching by company/department name is often not the best way to find accounts. For example, the account for the Provo Police Department could be saved under the following names:

- Provo Police Department
- Provo PD
- Provo Police Dept
- Provo City Police Department
- City of Provo
- City of Provo Police Department

Sage's search will only search for exact terms, so if you don't know exactly what name an account is under it won't come up. Luckily, there's details that are always consistent like address, zip code, and email domain. If you can't find an account by name, try searching by billing zip code, then email domain, then street address.

Searching by ZIP Code

To search by a customer's zip code, click on the search icon next to the Customer No. field in Customer Maintenance

On the search window that comes up, change the search field to "Zip Code" and punch in the customer's zip code. The address listed should be their billing address, so if they have a different address for shipping make sure to clarify that.

Searching by Email Domain

If zip code doesn't work, try searching by their email domain. Change the search field to "Email Address" and change the search filter to "Ends with". Put in everything after the "@" symbol in the customer's email address, and hit Find.

What if there are multiple accounts?

Sometimes multiple accounts will appear for the same department/company. At this point, you'll have to figure out which one to use. If any are marked with DNU, ignore those. If you scroll horizontally, you'll see some of the key details of the account. Try to find the account with the most details matching those of the customer you're talking to.

If multiple seem right, scroll all the way to the right and find the one that was used most recently. You can also check within the account to see if they've got all their details correct, or if they're set up with a tax exemption if applicable.

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