DUPLICATE ACCOUNTS and CONTACTS IN WPCRM

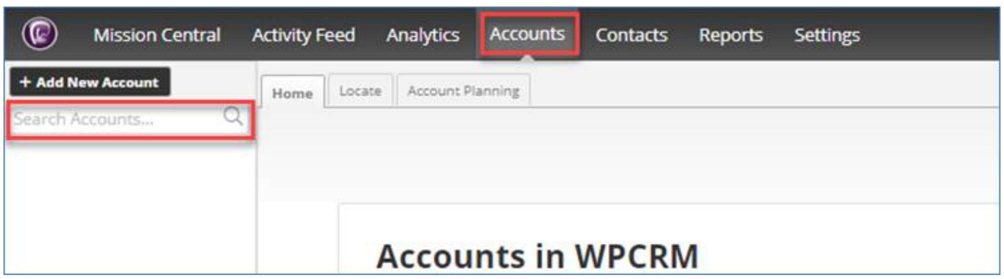
Although WPCRM warns of duplicate records when adding a Prospect, you should always perform a search of an Account as there could be a record under a different spelling. Search by phone number, different spellings, Contact, etc.

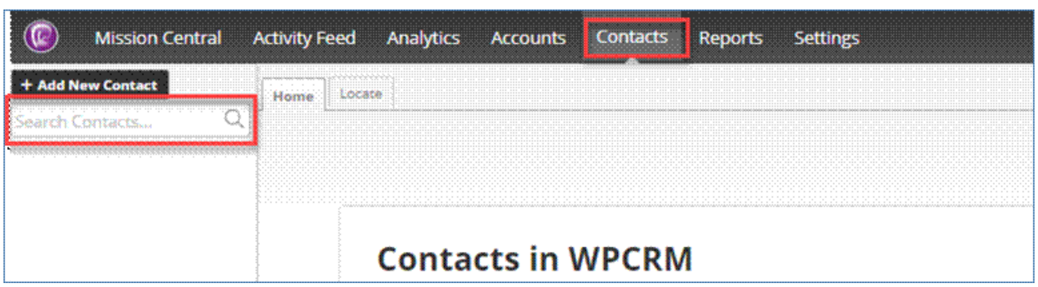
In addition, always perform a search of Contacts that will be added to your Prospect, as a person may have been with another company (will not appear as duplicate when entering new Prospect). If the Contact exists with another Account, check Contact Notes and access that Account record and verify if any issues have taken place.

If you have any concerns regarding an Account or Contact, contact the Credit or Accounts Payable Departments.

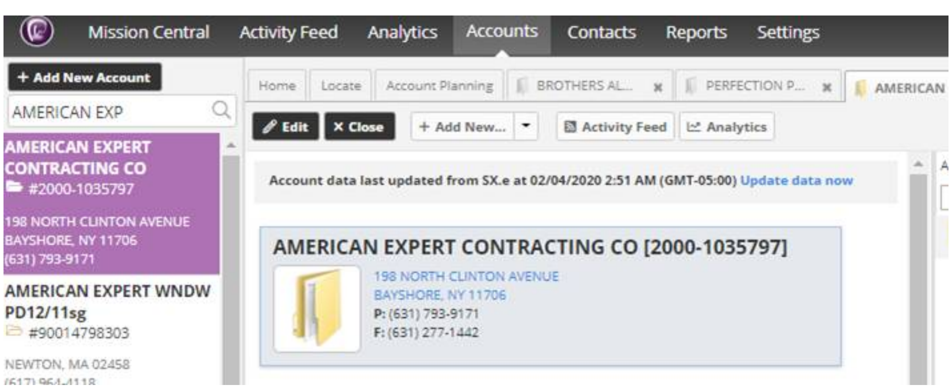
Searching for Accounts and Contacts

You can use the **Search box** on left of **Accounts** and **Contacts** screen.



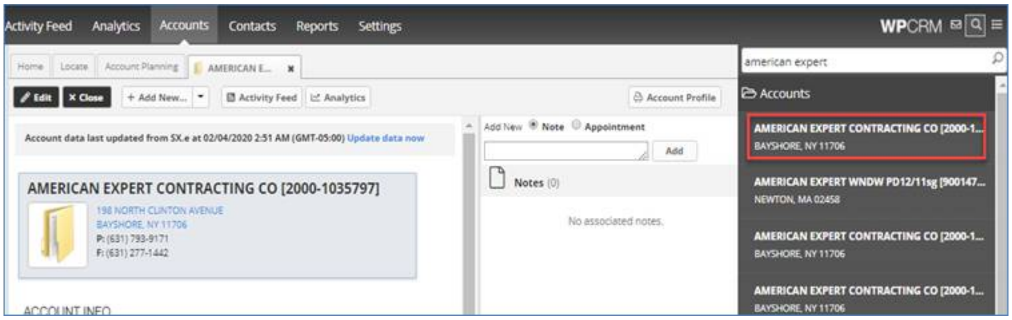


- Type partial or full company name or contact name, account number (include Company Number for better search – ex. 2000-1035797), phone number, etc. and listing appears on the left side based on entry. Click the desired record.



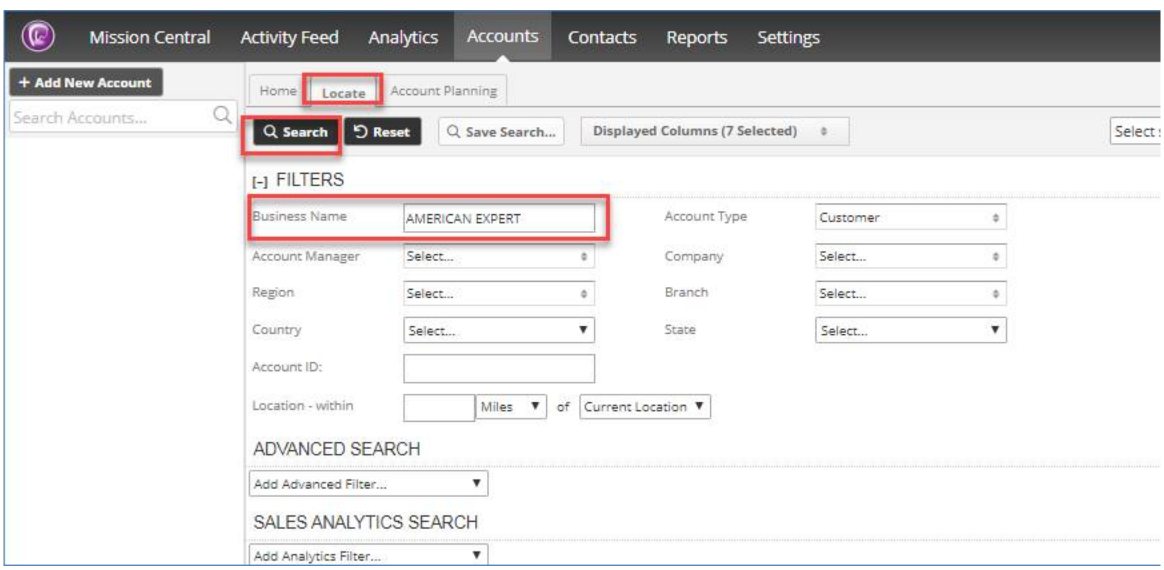
You can use **right pane search** from any screen

- Type partial or full company name or contact name, account number (include Company Number for better search – ex. 2000-1035797), phone number, etc. and listing appears on the right pane based on entry. Click the **desired record.**



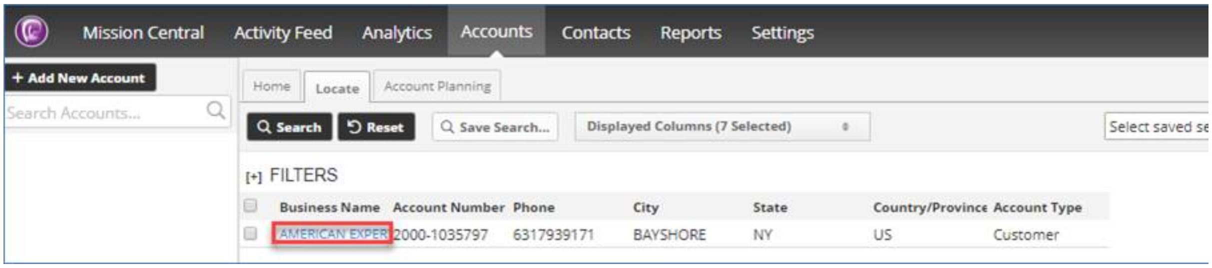
You can use the **Locate feature** from the Accounts and Contacts screen.

- Click **Locate** button. Enter any **entry (or combination)** to locate an Account or Contact and click **Search.** .



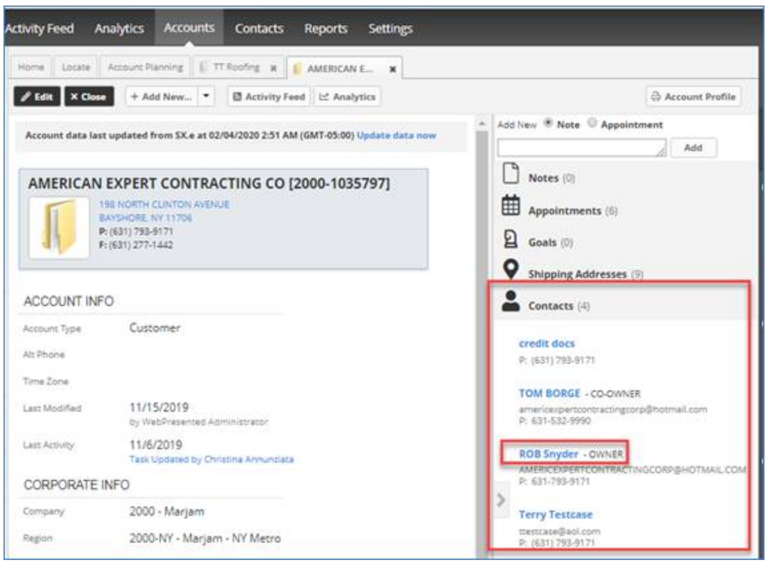
The FILTERS window appears with either the record or a list of records. If you want to redo your search, click **Reset**. You can click **Save Search** to save the criteria with a name (at any time you can click **Select saved search** on the right side to access your saved criteria)

- To access Account, click the **Business Name link** from list.

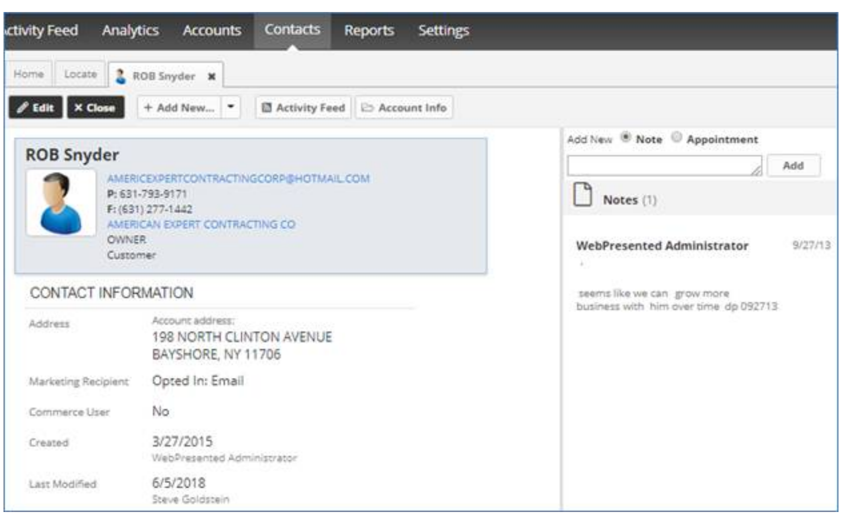


Regardless of how you accessed the Account, from the Accounts screen, you can view Account and Corporate information and view Notes.

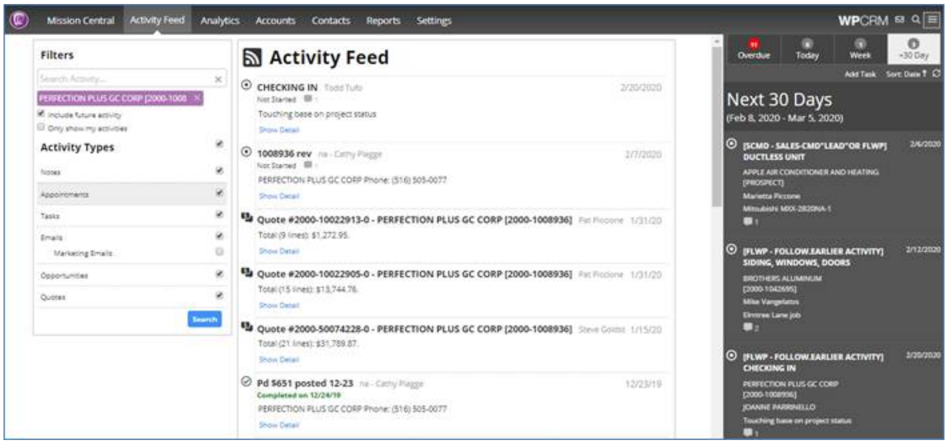
- You can click **Contacts** to view employees for the Account.



Regardless of how you accessed a Contact, from the Contacts screen, you can view contact information and view Notes.



- From the Accounts and Contact screen, you can click **Activity Feed** to view all Activities for the Account and Contact.



CLICK HERE for complete information regarding locating Accounts and Contacts.

Adding New Account (Prospect):

- **Quick Add** (click WPCRM logo on top left) allows you to add a Prospect with basic information (short version).
- You can add from an Account screen by clicking **Add New Account** on left (long version).
- You can add and Account from Mission Central Quick Links by clicking **New Prospect** on bottom (long version).

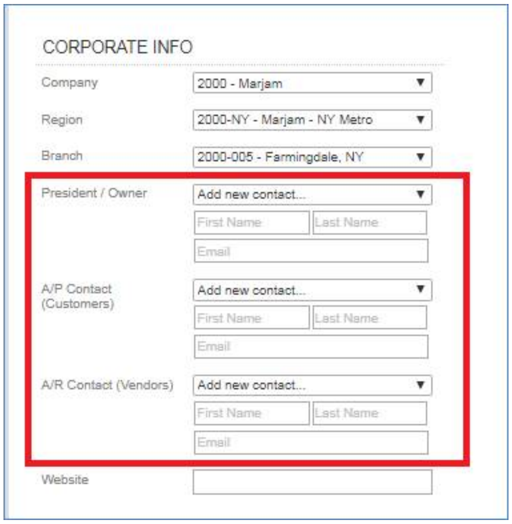
Adding New Contact:

- **Quick Add** (click WPCRM logo on top left) allows you to add a Contact.
- You can add a Contact from the Contact option (click **Add New Contact** on left).
- You can add a Contact to an Account from the respective Account screen (click **Add New** and then **Contact**).

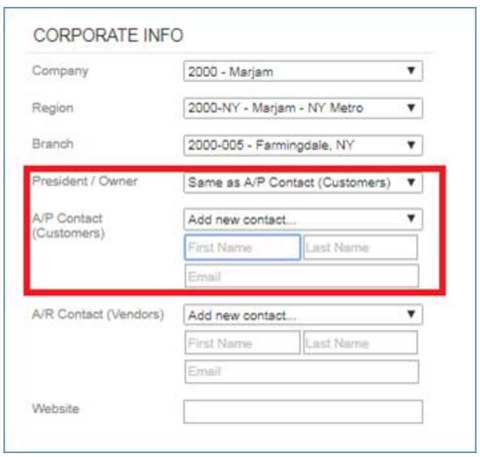
Obtain accurate Owner and AP Contact Names, email addresses, all phone (office and cell) and fax #'s, and Job Title (e.g., owner, AP clerk, estimator, project mgr). You must enter all other Contacts and this same information for all other Contacts you are aware of **BEFORE** requesting a conversion..

Adding Contacts While Adding Account

When adding a Prospect through the long version, you can add a new Contact as **President, AP Contact** (for Customers) and **AR Contact** (for Vendor). Do not add both on the same Account.



Also, indicate if the **President and AP and AR Contacts are the same**. This prevents duplicate Contacts from being created.



CLICK HERE for complete information regarding adding Accounts and Contacts with full procedures and entries.

Duplicate Accounts

You are responsible for making sure you do not enter duplicate Prospect/Account records. This MUST be done BEFORE sending your Customer and Vendor Setup Request to Corporate.

- WPCRM does not start showing you the potential duplicates until you have completely entered the Business name and have clicked in the next entry box. It is your responsibility to review the yellow highlighted list of possible duplicates to be certain you are not entering a duplicate record.
- WPCRM displays possible duplicates for you to review, but it will NOT stop you from entering a duplicate record. Possible duplicates REQUIRE your review and judgment.
- Best practice to avoid duplicates is to do a Quick Search on Business Name, Owner or Primary Contact Name, and Phone #'s. Perform a search of an Account under a different spelling.

- Read all Notes regarding an Account and Contact. Contact the Credit Department or your manager before calling any Account with a legal note or PD Customer Type (under Additional Info).
- If you have any concerns regarding an Account or Contact, contact the Credit or AP Departments.
- If you created a duplicate Account or Contact, contact the Credit or AP Department to have it deleted.
- If you make a mistake while entering a Prospect record and are asked to make a correction, just pull up the record and click Edit to make your changes. Do not correct your mistake by entering a whole new Prospect record for the same Account.
- When you are asked to correct a Contact record, you cannot make the correction in the Prospect record itself. You must pull up the Prospect or Account record, click the Contact icon at bottom right, click the Contact record you need to change, click Edit, make the change, and click Save.