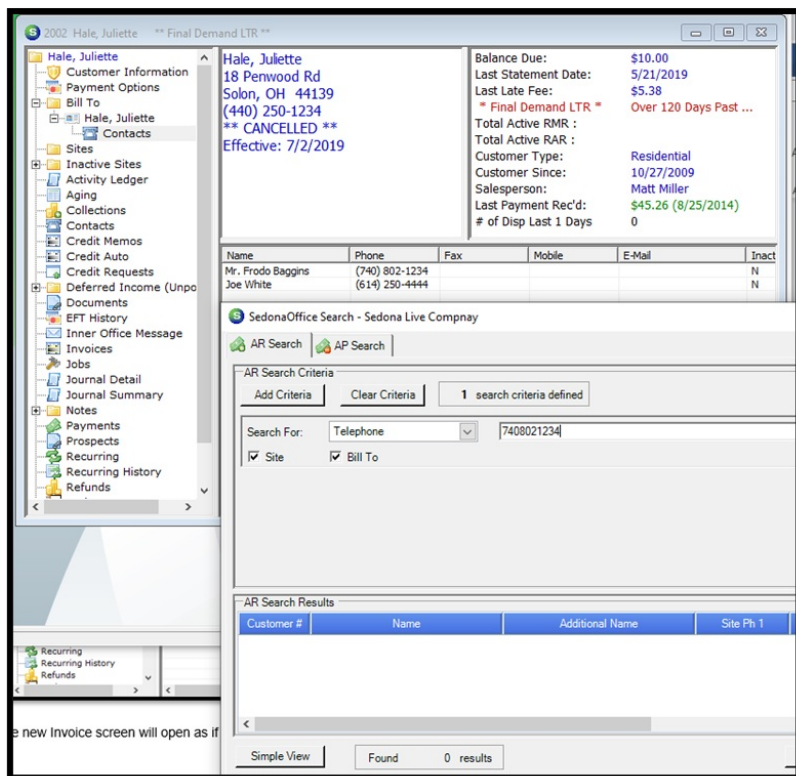


Using Phone Number to Search for Customers Does Not Always Work

Last Modified on 09/13/2024 4:38 pm EDT

Issue:

When attempting to search for a customer using a billing contact's phone number, the search does not return the expected results.



Resolution:

The telephone number search does not search for all contacts.

The query is looking at the Phone 1 and Phone 2 fields in the primary Bill To record.

Customer Billing 2002

Customer Information

Customer # 2002

Customer Name Hale, Juliette

Billing Information | Contacts | Email Addresses

Inactive
 Primary Mail

Residential Commercial

Name: Hale, Juliette

Additional Name: [Empty]

Address...: 18 Penwood Rd
Solon, OH 44139

Phone 1: (440) 250-1234 Primary RMR
Phone 2: (440) 250-1255 Primary Service
Eax: [Empty] Primary Job
Primary Email: [Empty] Primary Other
+ (0 on file)

It also looks at the phone numbers on the site records.

Site | Custom Fields | Systems | Jobs | Contacts | Invoices | Se

Site Name and Address

Residential Commercial

Site Number: 39483

Site Name: Juliette Hale

Add'l Name: [Empty]

Address...: 38 Penwood Rd
Solon, OH 44339

Phone 1: (440) 247-7896

Phone 2: (440) 248-4321

Below is a section of the query that is used for the search and it only looks at the primary billing and site records where the customer is not inactive.

```
WHERE (cust.Customer_Name <> 'N/A' AND cbill.Is_Primary = 'Y')
```

```
AND (cbill.Phone_1 LIKE '6127101390%' OR cbill.Phone_2
```

```
LIKE '6127101390%'
```

```
OR sSite.Phone_1 LIKE '6127101390%'
```

```
OR sSite.Phone_2 LIKE '6127101390%')
```

```
AND (cstat.Customer_Status_Id != 3) AND (cust.Customer_Id > 0)
```