ERM User Manual

Search Lookup Customer in ERM using ID Account Number

There are many ways to search for a customer in the company ERM systems. One method is to search by the customer ID Account Number. All customers are givenn an ID number that identifies their account. Not all customers are aware of the their customer ID account number. **PLEASE DO NOT ASK A CUSTOMER FOR THEIR ID ACCOUNT NUMBER** as they may not know.

If however they do know or you are searching for the account because reception has given you the account number or you have the account number you can search for the customer account using the ID Account Number.

How to Search for a Customer Account using the ID Account:

1. On the Main Menu click on **- Customer -** ;
2. Click on **- Search / Lookup Customer -** ;
3. When the page opens, in the - Customer List - and under the - Search Fields (Search by One or Multiple Fields) - you will find the ID Account Number field.
4. Enter the customer account number in this field to search and find the customer account. Do not enter the **#** when searching for the customer account, only the number

There are other search fields you can use to search for a customer account and each field is self explanatory. Remember that the search functionality works in combination of each field and will find the customer account that has the values entered in each field. The more fields you use the more accurate the search, however this may also make it harder to search for a customer account if the wrong value or text is entered in each field. It is recommended to use one field at a time and move to the next field if you cannot find the customer account you require.

Attached files:

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URL: https://staff.iconic.productions/KB/content/0cat=34/562/en/search-lookup-customer-in-erm-using-id-account-number.html