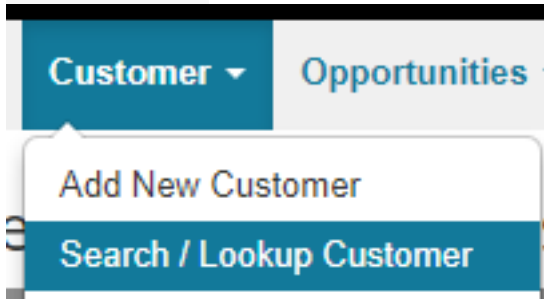


Customer

How do I search for a customer on the Search / Lookup a customer?

To search for a customer or company click on **Customer** and **Search / Lookup Customer**

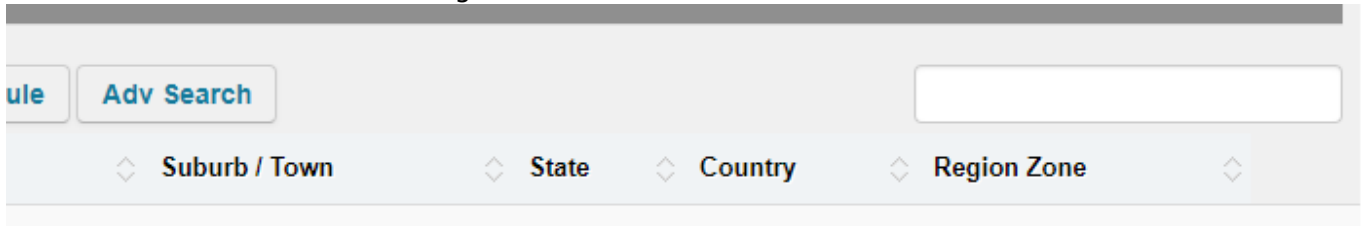


When searching for a customer using the [Search / Lookup a customer](#) page it is best to search for the customer in three easy steps.

Use the fields available one at a time. Each field will reduce the results based on each entered text in each field.

The results based on your search text and selected fields will display below.

If you are searching a customer from your customer account (**ID**) enter the customer account ID in the white field box found to the right of **Adv Search**.

A screenshot of the 'Search / Lookup a customer' page. It features a search bar with a 'Search' button on the left and an 'Adv Search' button on the right. Below the search bar, there are four dropdown menus labeled 'Suburb / Town', 'State', 'Country', and 'Region Zone'. Each dropdown menu has a small diamond icon to its left. The search bar is currently empty.

Firstly ask the customer for the company they are associated with and in the **Search / Lookup a customer** page in the "**Company Field**" enter the name of the company. Ask the customer for the spelling if unsure.

1. If the results are zero or have not found the correct company, then proceed below.

And

Secondly ask the customer for their full name or just their last name/surname and in the **Search / Lookup a customer** page in the "**Full Name Field**" enter the name of the customer. Ask the customer for the spelling if unsure.

1. If the results are zero or have not found the correct company, then proceed below.

And

Thirdly ask the customer for their work phone and in the **Search / Lookup a customer** page in the "**Phone Field**" enter the number (with the area code - but do not use ()). Ask the customer for the correct number if unsure.

1. If the results are zero or have not found the correct company, then ask the customer if they are an existing customer or a new customer.
 1. If they are an [existing customer](#), repeat the steps or try using the other fields to find

Customer

them.

1. If still the results are zero, then communicate with the team and see if they can help you find the customer.
2. If the customer they are a [new customer](#) and a [new company](#) then proceed to adding them as a **New Customer** (read more onÂ FAQÂ [Add a New Customer with a New Company](#)).
3. If the customer is a [new customer](#), but is with an [existing company](#), then proceed to add them as a **[New Customer to an Existing Company](#)**.

Attached files:

Unique solution ID: #1165

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