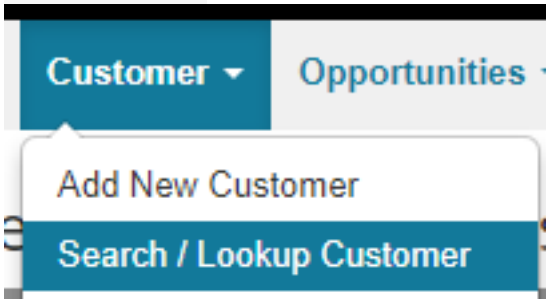
Customer

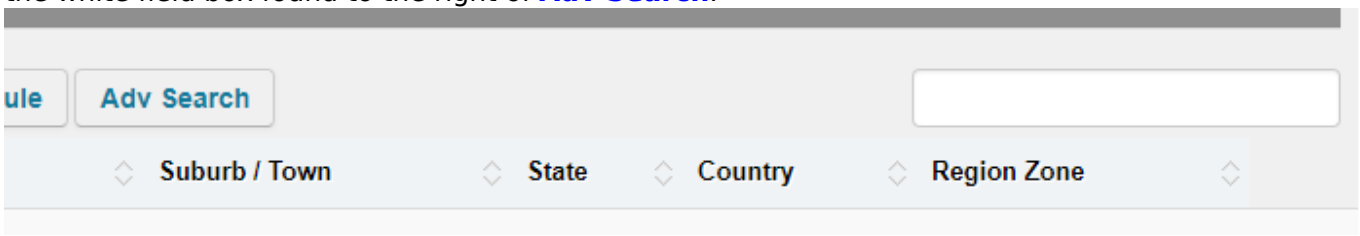
How do I search for a customer on the Search / Lookup a customer?

To search for a customer or company click onÂ **CustomerÂ** andÂ **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.Â 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**.



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.Â Ask the customer for the spelling if unsure.

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

Â

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

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

Â

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 ( )).Â 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

© 2026 Nikolas Harrington <support@iconic.productions> | 18-Nov-2026 09:03
URL: https://staff.iconic.productions/KB/content/0cat=41/166/en/how-do-i-search-for-a-customer-on-the-search-_-lookup-a-customer.html

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 CustomerÂ** (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
Author: Event Managers
Last update: 18-Sep-2017 03:09

© 2026 Nikolas Harrington <support@iconic.productions> | 18-Nov-2026 09:03
URL: https://staff.iconic.productions/KB/content/0cat=41/166/en/how-do-i-search-for-a-customer-on-the-search-_-lookup-a-customer.html