

How to Search for a Customer


- #1** Start by searching the customer by name. If the search returns multiple results, ask the customer for further information to select the correct profile. The search results can then be sorted to locate them quickly. If the search does not return results, you may search using a partial name to broaden the search, to locate misspellings or nicknames (search M Wazowski instead of Mike Wazowski this will locate Mike and Michael).

#2 Select Search.

The screenshot shows a software interface with several sections: BULLETINS, CUSTOMERS, ORDERS, VEHICLES, and VENDORS & AGENTS. The CUSTOMERS section is highlighted with a blue border and contains search fields for Customer Class, Identifier Type, Identifier#, ZIP/Postal, Last Name, First Name, Date of Birth, and Business Name. A red circle highlights the 'SEARCH' button, and a '#2' label is placed next to it. Blue arrows point to the 'Customer #', 'Identifier #', and 'Last Name' fields. The ORDERS section has a search field for Order #. The VEHICLES section has fields for Hull ID/Serial #, Vehicle Type, Title #, and Owner/Co-Owner. The VENDORS & AGENTS section is partially visible at the bottom.

- #1** If the correct customer is not found, you will need to add the customer.

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 No results found matching the search criteria. Please re-enter.

FIND CUSTOMER: Customer Search/List

Customers | Permits

Identifier/Cert/Edu Type: Customer #
 Identifier/Cert/Edu #:
 State:
 Harvest #:
 Inventory Type:
 Inventory #:

Customer Class:
 Status: Active
 Receipt #:
 Order #:
 TAN:
 Permit #:

Last Name: Holland
 First Name: Xan
 Middle Name:
 Business Name:
 Date of Birth Match: Exact Match
 Date of Birth:

Phone Number:
 Include Area Code
 Address Type: Physical
 Street Address:
 Supplemental Address:
 City/Town: