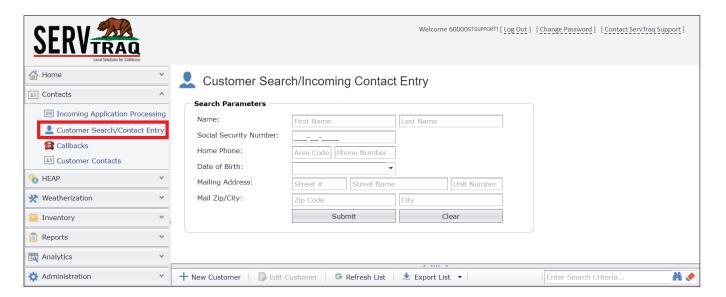
# 2.1

# **Customer Search/Incoming Contact Entry**

The Customer Search/Incoming Contact Entry feature is used to search for customers using a combination of available contact information. Once a record is found or added, users can build a customer record to track and store information, such as any incoming contact between the customer and the agency.



	ICON KEY
+	Add a new customer
	Edit the customer record
G	Refresh the search results
₹	Export search results to PDF, Excel (XLS, XLSX, CSV), or Word (RTF) Format
44	Apply search criteria
	Clear search criteria
	·

## **Customer Search**

Search for a customer using any or all of the fields listed in the table below.

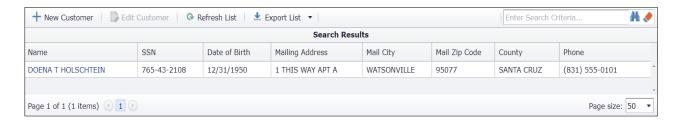
Customer Search/Incoming Contact Entry					
Search Parameters					
Name:	DOENA		HOLSCHTEIN		
Social Security Number:	765-43-2108				
Home Phone:	Area Code Phone Number				
Date of Birth:		•			
Mailing Address:	Street #	Street Name		Unit Number	
Mail Zip/City:	Zip Code		City		
	Submit		С	lear	

Click Submit to run the search. Click Clear to erase the fields.

ENTRY FIELDS	DESCRIPTION
Name	① First Name ② Last Name
Social Security Number	The customer's 9-digit SSN
Home Phone	Home phone number without a hyphen
Date of Birth	Customer's DOB in the following format: MM/DD/YYY
Mailing Address	<ul><li>① Street Number</li><li>② Street Name/PO Box</li><li>③ Unit Number</li></ul>
Mail Zip/City	<ul><li>① Zip Code</li><li>② City</li></ul>

#### **Search Results**

Records found are displayed under Search Results.

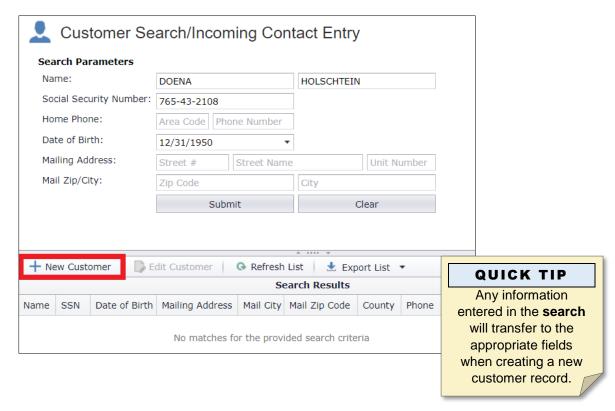


**Customer record not found?** → Click **New Customer** to create a new customer record.

**Customer record exists?** → Click on the customer's <u>NAME</u> OR double-click on the search result to open the customer record.

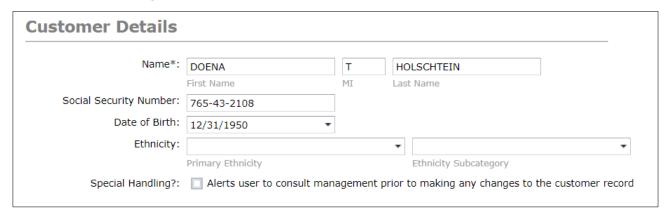
### **Add a New Customer**

**If the customer record is not found**, click New Customer to create a new record.



#### I. Customer Details

The Customer Details section is designed to track customer personal information. Fill out the following fields below:





#### NOTE

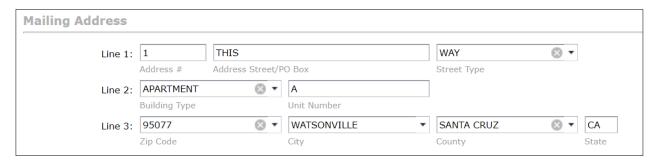
Fields with drop down arrows contain a menu of available options.

ENTRY FIELDS	DESCRIPTION
Name	⊕ First Name*
	② Middle Initial
	3 Last Name*
Social Security Number	The customer's 9-digit SSN
Date of Birth	Customer's DOB in the following format: MM/DD/YYY
Ethnicity	Primary Ethnicity
	Ethnicity Subcategory
Special Handling?	Check ☑ if the customer/record requires
	additional review from management

Required fields are denoted with a red asterisk. (\*)

#### II. Mailing Address

The Mailing Address is tracked through this section. To add a *Mailing Address*, see the fields listed in the table below.

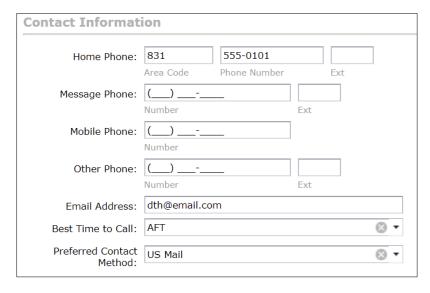


ENTRY FIELDS	DESCRIPTION
Line 1	① Address Number
	② Street Name/PO Box
	3 Street Type
Line 2	① Building Type
	② Unit Number
Line 3	① Zip Code
	② City*
	③ County*

\*These fields automatically populate after the zip code is entered.

#### **III.** Contact Information

The Contact Information section is used to track various phone numbers as well as an e-mail address. To add Contact Information, see the fields listed below.



ENTRY FIELDS	DESCRIPTION
Home Phone	Landline phone number
Message Phone	Phone number capable of receiving messages
Mobile Phone	Cellular mobile phone number
Other Phone	Other contact phone number
Email Address	Email address for online communication, receipts,
	confirmations, etc.
	Select from:
Best Time to Call	② Evening (EVE)
	3 Morning (MORN) OR
	None
	Select from:
Preferred Contact	① Email
Method*	② SMS Text Message OR
	③ US Mail

Required fields are denoted with a red asterisk. (\*)

#### **NOTE**



The three sections above must be completed and saved to activate additional sections within the Customer Record.