

Customer Find Filter

Introduction

The **Customer Find** filter allows you to search for customers based on a large range of criteria. It appears in numerous places throughout the software, especially in marketing related areas (e.g. postcards, exports, mailings, etc) and reports. Learning to master this filter is critical to getting the most out of the software.

Tab Breakdown

General

Used to search on general criteria.

Find Customers

General Results Merchandise Wishes Dates Other Keys Amt Spent Repair/Custom Appraisal Rewards/Referral Postcards

Last Name

First Name

Spouse/Partner

Company

Company Account

Phone Preferred Phone Only

Street

City

State ZIP Preferred Address Only

Email Preferred Email Only

License #

ID # (Note: All other criteria will be ignored)

Search Mode Starts With

Sort Order Customer #

Inactive Account

Presets... OK Cancel

Fields and options include:

Last Name Search by last name

First Name Search by first name

Spouse/Partner Search by customer's spouse/partner

Company Search by company name

Company Select whether to include customers marked as company accounts

Account Checked - Only include company accounts

Unchecked - Do not include company accounts

Square Check - Include customers & company accounts

Phone	Search by phone number
Preferred Phone Only	Only return customer's primary phone number in search results; if unchecked it will instead display one row for each phone number on file, i.e. same customer could be listed multiple times
Street	Search by street address
City	Search by city
State	Search by state
ZIP	Search by ZIP or postal code
Preferred Address Only	Only return customer's primary address in search results; if unchecked it will instead display one row for each address on file, i.e. same customer could be listed multiple times
Email	Search by email address
Preferred Email Only	Only return customer's primary email in search results; if unchecked it will instead display one row for each email on file, i.e. same customer could be listed multiple times
License #	Search by driver's license number
ID #	Bring up a specific customer by their customer ID; all other criteria will be ignored
Search Mode	Whether to search by exact match or partial match, options include: Exact Match Only Return records that exactly match all entered criteria Starts With Return records whose fields start with entered criteria Ends With Return records whose fields end with entered criteria Contains Return records that match any portion of entered criteria
Sort Order	Controls how resulting list is sorted.
Inactive Account	Select whether to include inactive (disabled) accounts Checked - Only include inactive accounts Unchecked - Do not include inactive accounts Square Check - Include inactive & active accounts

Results

Defines how to search and display customer records. This is useful for doing targeted marketing. For example, you could use this in conjunction with the **Dates** tab to do a mailing campaign directed at female spouse's whose husbands have a birthday coming up next month.

The screenshot shows the 'Find Customers' dialog box with the following settings:

- Addressee:**
 - Primary Contact
 - Spouse/Partner
- Birthday Celebrant:**
 - Male Celebrant
 - Female Celebrant
 - Either Gender
- Celebrant's Spouse/Partner:**
 - Male Celebrant
 - Female Celebrant
 - Either Gender
 - Male
 - Female
 - Couple
 - Each Individually
- If Gender is Unknown:**
 - Guess Gender
 - If Gender Still Unknown or Does Not Match...**
 - Exclude customer from results
 - Include Primary Contact Instead
 - Include Spouse/Partner Instead (If Any)
- Spouse/Partner Required:**
 - Include Customers With Or Without Spouse/Partner
 - Include Only Customers With Spouse/Partner
 - Include Only Customers Without Spouse/Partner

Buttons at the bottom: Presets..., OK, Cancel.

Options are divided into three sections.

Addressee:

Primary Contact Displays the primary contact on the customer record

Spouse/Partner Displays the spouse of the primary contact

Birthday Celebrant Displays the birthday celebrant regardless of whether they are primary or spouse

Male Celebrant Only display males

Female Celebrant Only display females

Either Gender Display all celebrants

Celebrant's Spouse/Partner Displays the spouse of the birthday celebrant

Male Celebrant Only display males

Female Celebrant Only display females

Either Gender Display all celebrants

Male Only display male customers

Female Only display female customers

Couple For customers with a spouse/partner, this will display them as a couple on a single row

Each Individually Display each primary or spouse on their own row

If Gender is Unknown:

Guess Gender Instructs software to guess gender based on name if no gender on file

If Gender still unknown Determine what to do if gender cannot be determined; you can exclude, include, or include their spouse/partner instead regardless of Addressee option chosen

Spouse/Partner Required:

Specify whether to include customers regardless of whether or not they have a spouse, or only include those with spouses, or only include those without spouses

Merchandise

Search customers based on their inventory purchase history. Unlike the **Amt Spent** tab, this does not look at non-inventory transactions.

Find Customers

General Results **Merchandise** Wishes Dates Other Keys Amt Spent Repair/Custom Appraisal Rewards/Referral Postcards

Has Purchased At Least this merchandise...

\$ Amount

No. Items

Item Filter

Date Range

Couple Individual

Has NOT Purchased At Least this merchandise...

\$ Amount

No. Items

Item Filter

Date Range

Couple Individual

Presets... OK Cancel

Fields and options are divided into two sections.

Has purchased at least this merchandise:

\$ Amount Include customers who have spent at least this much

No. Items Include customers who have purchased at least this many items

Item Filter Opens the item filter allowing you to include customers based on specific sold item criteria

Date Range Include customers who have made a purchase in this time period

Couple/Individual Controls whether purchases should be calculated individually or as a joined account (couple)

Has NOT purchased at least this merchandise:

\$ Amount Include customers who have not spent at least this much

No. Items Include customers who have not purchased at least this many items

Item Filter Opens the item filter allowing you to exclude customers based on specific sold item criteria

Date Range Include customers who have not made a purchase in this time period

Couple/Individual Controls whether purchases should be calculated individually or as a joined account (couple)

Wishes

Search customers by the items saved on their wish lists.

Fields and options include:

Wish Option Specify whether you are searching for wishes that match or do not match the criteria entered on this tab

Wish Status Include customers with wishes that are open, closed (i.e. bought), or include both

Date Entered Include customers with wishes entered during a specific time period

Enter By Include customers with wishes entered by a specific associate

Comments Include customers with wishes that include these comments

Item Options Determine whether to include customers whose wishes are in inventory, not in inventory, or include both

Item Filter Opens the item filter allowing you to include customers based on more specific item information

Sale # Only include customers with wishes originating from this sale number

Store # Include customers with wishes from this store number

Vendor ID Include customers with wishes for this vendor

Vendor Style Include customers with wishes for this vendor style number

Min / Max Price Include customers with wishes between this retail price range

Event Include customers with wishes designated for specific events (e.g. mother's day, anniversary, birthday)

Event Date Include customers with wishes for one or more events that falls within this date range; use checkbox if you want to ignore year

Dates

Search for customers based on a variety of date related criteria.

Find Customers

General Results Merchandise Wishes Dates Other Keys Amt Spent Repair/Custom Appraisal Rewards/Referral Postcards

Occasion All Dates

Birthday

Spouse/Partner Birthday

Anniversary

Other Birthday

Other Spouse/Partner Birthday

Other Anniversary

Other Occasion

Ignore Year In Date

Date Entered All Dates

Date Modified All Dates

Pop-Up Starts All Dates

Pop-Up Ends All Dates

Pop-Up Completed All Dates

Presets... OK Cancel

Fields and options include:

Occasion Include customers who have occasions within the specified date range; works in conjunction with checkboxes below it to filter by specific occasion types

Date Entered Include customers who were added during a specified date range

Date Modified Include customers who records were last modified during a specified date range

Pop-Up Starts Include customers whose records have a pop-up that starts in this date range

Pop-Up Ends Include customers whose records have a pop-up that ends in this date range

Pop-Up Completed Include customers who records have a pop-up that was marked done in this date range

Other Keys

Search for customers on additional miscellaneous criteria.

Find Customers

General Results Merchandise Wishes Dates Other Keys Amt Spent Repair/Custom Appraisal Rewards/Referral Postcards

Acquisition

His Finger Sz

Her Finger Sz

Metal Pref

Stone Pref

Custom 4

Custom 5

Custom 6

Custom 7

Custom 8

Notes
(only searches first 255 characters of the notes field)

Group/Mailing List

Referred By

Associate

Why In

Presets... OK Cancel

Fields and options include:

Acquisition Include customers based on their acquisition (very first why-in)

Custom 0 - 8 Include customers based on custom fields; these can be renamed in System Options; if not renamed, Custom 0 will display as Cust Type

Notes Include customers with matching notes (only first 255 characters is searched)

Group/Mailing List Include customers based on a group or mailing list

Referred By Include customers based on who referred them

Associate Include customers based on what associate is assigned to them

Why In Include customers whose visit to the store was recorded by a particular why-in

Amount Spent

Search customers based on the amount spent at the store regardless of transaction type. For a more refined search based on inventory purchases use the **Merchandise** tab.

Fields and options are divided into two sections.

Has spent this much:

\$ Amount Includes customers who have spent at least this amount

Exclude House Account Check this to exclude house accounts from counting towards dollars spent

Date Range Include customers who have spent this amount during this date range

Couple/Individual Controls whether amount spent should be calculated individually or as a joined account (couple)

Has NOT spent this much:

\$ Amount Includes customers who have not spent at least this amount

Exclude House Account Check this to exclude house accounts from counting towards dollars spent

Date Range Include customers who have not spent this amount during this date range

Couple/Individual Controls whether amount spent should be calculated individually or as a joined account (couple)

Repair/Custom

Search customers by repair or custom job activity.

The screenshot shows the 'Find Customers' dialog box with the 'Repair/Custom' tab selected. The dialog is split into two main sections: 'HAS AT LEAST THIS MANY REPAIRS OR CUSTOM JOBS' and 'DOES NOT HAVE THIS MANY REPAIRS OR CUSTOM JOBS'. Each section contains three input fields: 'Total Amt \$', 'Min Each \$', and 'No. Items'. Below these is a 'Repair Filter' dropdown menu. Underneath is a 'Selection Method' section with two radio buttons: 'Individual Tasks' and 'Repairs That Include Qualifying Tasks'. At the bottom of each section are 'Couple' and 'Individual' radio buttons. The bottom of the dialog features a 'Presets...' button on the left and 'OK' and 'Cancel' buttons on the right.

Fields and options are divided into two sections.

Has at least this many repairs or custom jobs:

Total Amt \$ Includes customers who have spent at least this total amount on all repair or custom jobs

Min Each \$ Includes customers who have spent at least this much on a single repair or custom job

No. Items Includes customers who have had at least this many repairs or custom jobs

Repair Filter Opens the repair filter which allows you to specify additional criteria (e.g. repair tasks, dates) for repairs or custom jobs

Selection Method Controls whether selection criteria applies to individual repair tasks or to entire repair (e.g. if you define a Min Each \$ of \$100, do you only want repairs with individual tasks of \$100 or greater, or repairs with total of all tasks that is \$100 or greater)

Couple/Individual Controls whether repair and custom jobs should be calculated individually or as a joined account (couple)

Does not have this many repairs or custom jobs:

Total Amt \$ Includes customers who have not spent at least this total amount on all repair or custom jobs

Min Each \$ Includes customers who have not spent at least this much on a single repair or custom job

No. Items Includes customers who have not had at least this many repairs or custom jobs

Repair Filter Opens the repair filter which allows you to specify additional criteria (e.g. repair tasks, dates) for repairs or custom jobs

Selection Method Controls whether selection criteria applies to individual repair tasks or to entire repair

Couple/Individual Controls whether repair and custom jobs should be calculated individually or as a joined account (couple)

Appraisal

Search customers by appraisal activity.

Find Customers

General Results Merchandise Wishes Dates Other Keys Amt Spent Repair/Custom **Appraisal** Rewards/Referral Postcards

HAS at least this many Appraisals.

No. Appraisals

Appraisal Filter

Couple Individual

DOES NOT HAVE this many Appraisals.

No. Appraisals

Appraisal Filter

Couple Individual

Presets... OK Cancel

Fields and options are divided into two sections.

Has at least this many Appraisals:

No. Appraisals Include customers who have had at least this many appraisals

Appraisal Filter Opens the appraisal filter allowing you to specify additional criteria

Couple/Individual Controls whether appraisals should be counted individually or as a joined account (couple)

Does not have this many Appraisals:

No. Appraisals Include customers who have not had at least this many appraisals

Appraisal Filter Opens the appraisal filter allowing you to specify additional criteria

Couple/Individual Controls whether appraisals should be counted individually or as a joined account (couple)

Rewards/Referral

Search customers by reward/referral card activity.

Fields and options include:

Card Include customers regardless of whether or not they have rewards card, or only include customers with rewards cards, or only include customers without; many of the other fields and options only display if this is set to 'Has a Rewards Card'

Rewards Tier Include customers from one or more reward tiers

Has a Rewards Balance Check this to only include customers that have a rewards balance

Issued Include customers with a card issued in this date range

Expires Include customers with a card that expires in this date range

All Expired Cards Check this to include all customers with expired cards

Redeem By Include customers with a rewards card that must be redeemed in this date range

Has referred other customers Include customers that have referred someone else

Has been Referred Include customers that have been referred to your store by someone else

Has been given a Referral Card Include customers that have been given referral cards

Postcards

Search customers by postcard activity.

The screenshot shows the 'Find Customers' dialog box with the 'Postcards' tab selected. The dialog is divided into two sections: 'Postcards Sent' and 'Postcards Not Sent'. Each section contains a 'Date Range' dropdown menu (set to 'All Dates') and a 'Postcard Info' dropdown menu. At the bottom, there are 'Presets...', 'OK', and 'Cancel' buttons.

Fields and options are divided into two sections.

Postcards sent:

Date Range Include customers who were sent postcards in this date range

Postcard Info Include customers who sent specific postcard types (can choose multiple)

Postcards not sent:

Date Range Include customers who were not sent postcards in this date range

Postcard Include customers who were not sent specific postcard types (can choose
Info multiple)