Customer Find Changes

Introduction

Many additional search options have been added to **Customer Find** in the form of **new checkboxes** and **updates** to **existing checkboxes**, giving you the ability to target additional groups of customers.

Search options added include:

- Preferred Contacts (phone/email/address/social media)
- Cell/Mobile Number
- Do Not Contact – phone numbers
- Do Not Contact – emails
- Tax Exempt status
- House Accounts

Customer Find Options Breakdown

All newly added search options will appear as **checkboxes** and can be found exclusively on the **General** tab of **Customer Find**.

To begin using the new search options added to **Customer Find**, navigate to **Customers > Find**. The updated **Customer Find** window will open:

Checkbox Functionality

With the exception of the **Tax Exempt** checkbox, each of the new checkboxes is a **tristate checkbox**, meaning it serves 3 different functions determined by the box being **checked, unchecked**, or **partially checked (square)**.

Below you will find the names of each new checkbox, as well as functionality descriptions for each type of available check:

Tax Exempt	Only displays accounts marked Tax Exempt
Preferred Phone Only	Checked – Only display phone numbers marked **Preferred** **Unchecked –** Display **all** phone numbers **Square –** Only display phone numbers **NOT** marked **Preferred**
Cell/Mobile Numbers Only	Checked – Only display phone numbers marked **Cell/Mobile** **Unchecked –** Display **all** phone numbers **Square –** Only display phone numbers **NOT** marked **Cell/Mobile**
Do Not Contact	Checked – Only display phone numbers marked **'Do Not Contact'** **Unchecked –** Display **all** phone numbers **Square –** Only display phone numbers **NOT** marked **'Do Not Contact'**
Preferred Address Only	Checked – Only display addresses marked **Preferred** **Unchecked –** Display **all** addresses **Square –** Only display addresses **NOT** marked **Preferred**
Preferred Email Only	Checked – Only display emails marked **Preferred** **Unchecked –** Display **all** emails **Square –** Only display emails **NOT** marked **Preferred**
Do Not Send Promo	Checked – Only display phone numbers marked **'Do Not Contact'** **Unchecked –** Display **all** phone numbers **Square –** Only display phone numbers **NOT** marked **'Do Not Contact'**
Preferred Social Only	Checked – Only display social contacts marked **Preferred** **Unchecked –** Display **all** social contacts **Square –** Only display social contacts **NOT** marked **Preferred**