

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:

The screenshot shows the 'Find Customers' dialog box with the following fields and options:

- General Results Merchandise Wishes Dates Other Keys Amt Spent Repair/Custom Appraisal Rewards/Referral Postcards
- Last Name [Text Field]
- First Name [Text Field]
- Spouse/Partner [Text Field]
- Company [Text Field]
- Company Account Tax Exempt
- Phone [Text Field] Preferred Phone Only
- Cell / Mobile Numbers Only Do Not Contact
- Street [Text Field]
- City [Text Field]
- State [Text Field] ZIP [Text Field] Preferred Address Only
- Email [Text Field] Preferred Email Only
- Do Not Send Promo Preferred Social Only
- Social Type [Dropdown Menu]
- Address [Text Field]
- License # [Text Field]
- ID # [Text Field] (Note: All other criteria will be ignored)
- Search Mode Starts With [Dropdown Menu]
- Sort Order Customer # [Dropdown Menu]
- Inactive Account
- Include Customers With Hidden Contact Info
- Store [Dropdown Menu]
- Presets... [Button]
- OK [Button]
- Cancel [Button]

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	<p>Checked – Only display phone numbers marked Preferred</p> <p>Unchecked – Display all phone numbers</p> <p>Square – Only display phone numbers NOT marked Preferred</p>
Cell/Mobile Numbers Only	<p>Checked – Only display phone numbers marked Cell/Mobile</p> <p>Unchecked – Display all phone numbers</p> <p>Square – Only display phone numbers NOT marked Cell/Mobile</p>
Do Not Contact	<p>Checked – Only display phone numbers marked 'Do Not Contact'</p> <p>Unchecked – Display all phone numbers</p> <p>Square – Only display phone numbers NOT marked 'Do Not Contact'</p>
Preferred Address Only	<p>Checked – Only display addresses marked Preferred</p> <p>Unchecked – Display all addresses</p> <p>Square – Only display addresses NOT marked Preferred</p>
Preferred Email Only	<p>Checked – Only display emails marked Preferred</p> <p>Unchecked – Display all emails</p> <p>Square – Only display emails NOT marked Preferred</p>
Do Not Send Promo	<p>Checked – Only display phone numbers marked 'Do Not Contact'</p> <p>Unchecked – Display all phone numbers</p> <p>Square – Only display phone numbers NOT marked 'Do Not Contact'</p>
Preferred Social Only	<p>Checked – Only display social contacts marked Preferred</p> <p>Unchecked – Display all social contacts</p> <p>Square – Only display social contacts NOT marked Preferred</p>