

Searching for an Existing Customer

There are multiple ways to search for an existing customer.

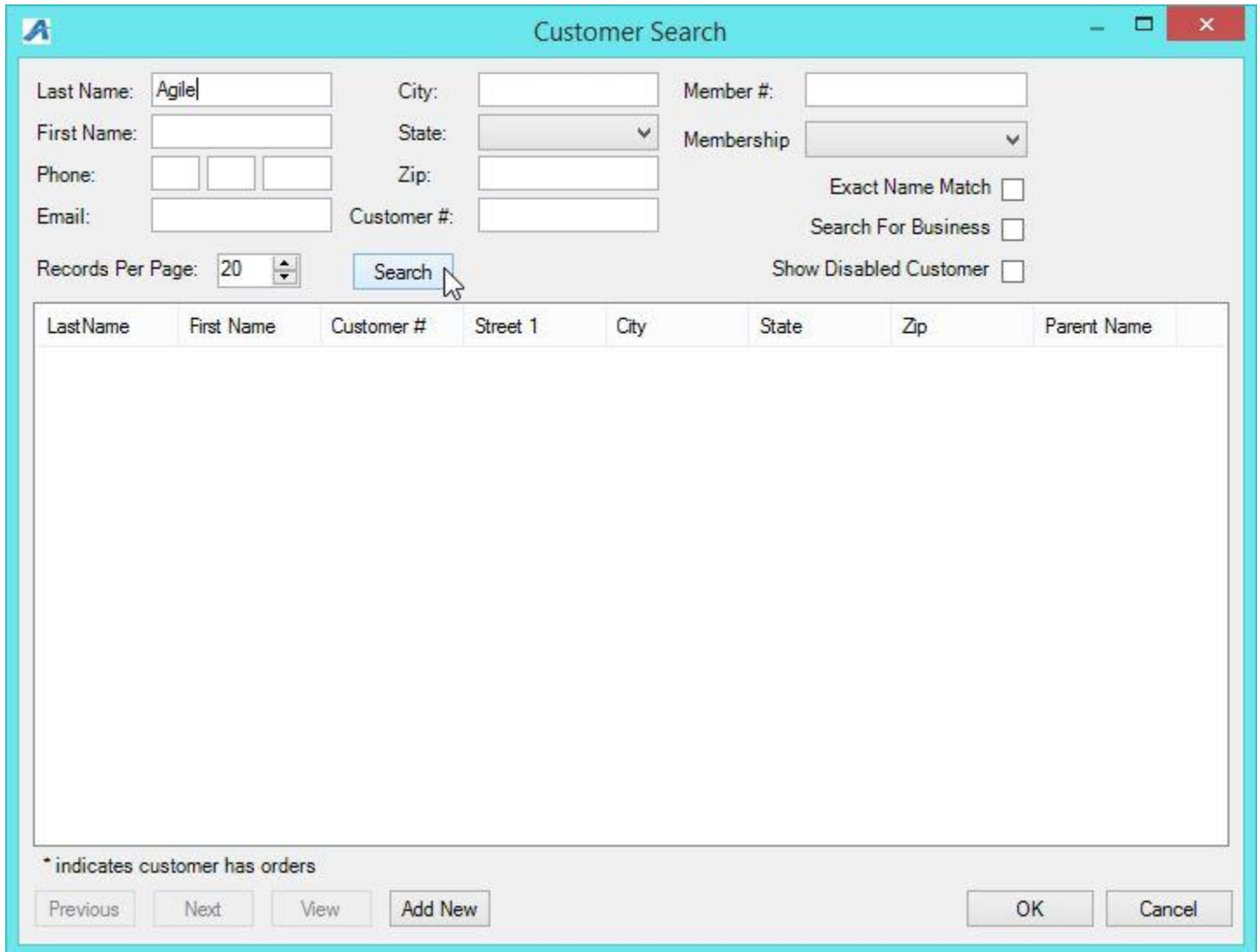
AMS Sales

1) [Login](#) to the Sales.



2) Click on the **Customer icon**.

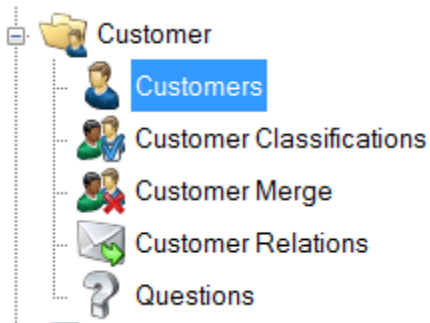
3) Enter in the customer's information and click **Search**.

A screenshot of a 'Customer Search' window. The window has a title bar with a blue 'A' logo and the text 'Customer Search'. It contains several input fields: 'Last Name' (with 'Agile' entered), 'First Name', 'Phone' (three separate boxes), 'Email', 'City', 'State' (dropdown), 'Zip', 'Member #', and 'Customer #'. There are also dropdowns for 'Membership' and 'Records Per Page' (set to 20). Three checkboxes are on the right: 'Exact Name Match', 'Search For Business', and 'Show Disabled Customer'. A blue 'Search' button is highlighted with a mouse cursor. Below the form is a table with columns: 'LastName', 'First Name', 'Customer #', 'Street 1', 'City', 'State', 'Zip', and 'Parent Name'. The table is currently empty. At the bottom, there is a legend '* indicates customer has orders' and buttons for 'Previous', 'Next', 'View', 'Add New', 'OK', and 'Cancel'.

Administration

1) [Login](#) to the **Administration**.

2) Expand the Customer folder and click on the Customers icon.



3) Enter in the customer's information and click **Search**.

Last Name: City: Member #:
First Name: State: Membership:
Phone: Zip: Exact Name Match
Email: Customer #: Search For Business
Records Per Page: 20 Show Disabled Customer

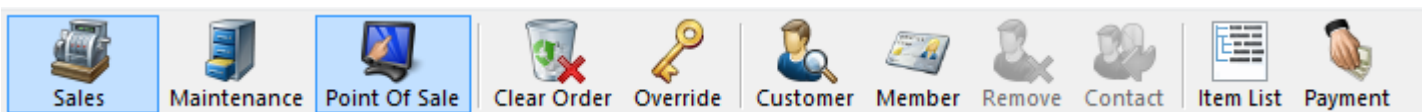
| Last Name | First Name | Customer # | Street 1 | City | State | Zip | Parent Name |
|-----------|------------|------------|----------|------|-------|-----|-------------|
|-----------|------------|------------|----------|------|-------|-----|-------------|

* indicates customer has orders

POS

1) [Login](#) to the **Sales** side of Agile.

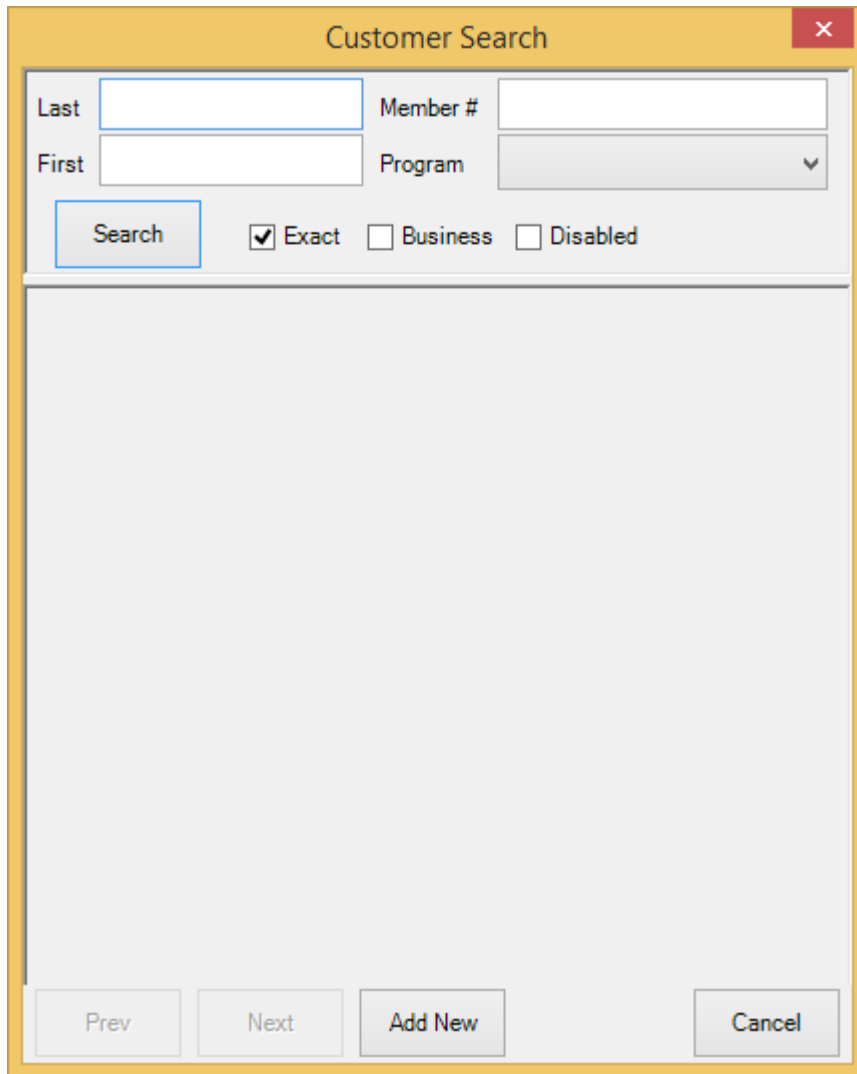
2) Go into POS.



3) Click on the **Search** icon.



4) Enter in the customer's information and click **Search**.



Customer Search

Last Member #

First Program

Exact Business Disabled

NOTE:

If the customer is not coming up, try searching for a limited amount of information (ex. last name only). Make sure Exact Name Match and Search For Business are unchecked to broaden the search range.