

Searching for an Existing Customer

There are multiple ways to search for an existing customer.

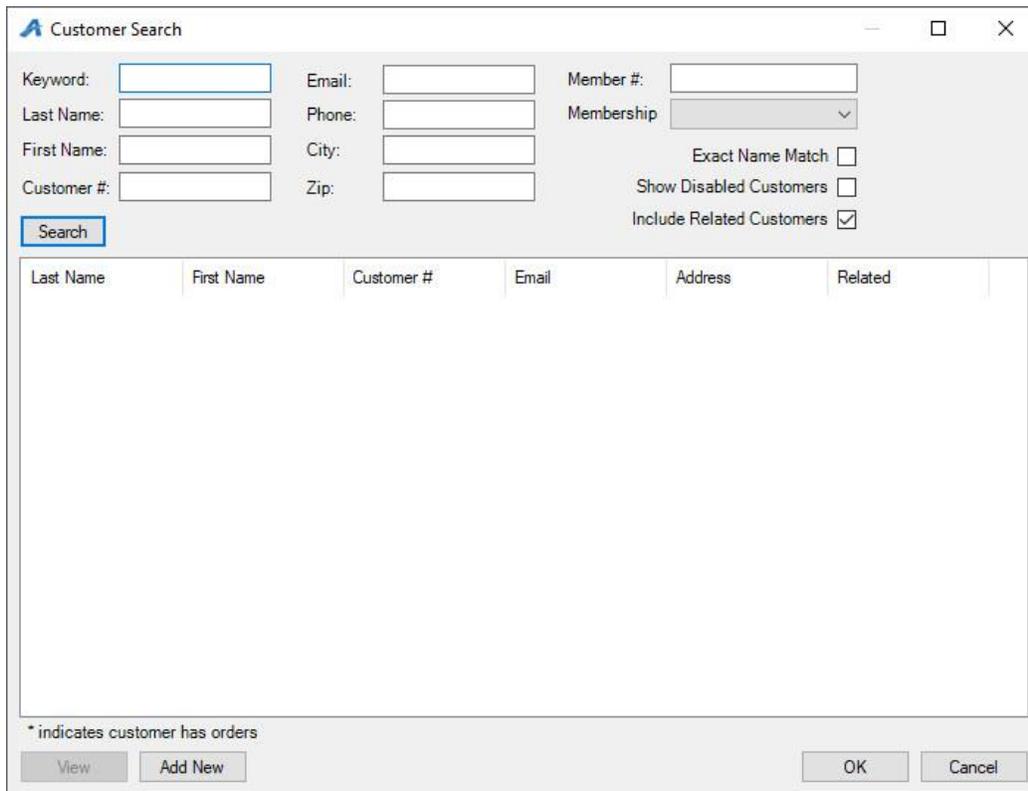
AMS Sales

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



2) Click the **Customer icon**.

3) Type a **Keyword** to search for the customer (last name, phone number, email, customer #, etc.) and click the **Search** button.



The "Customer Search" dialog box contains the following fields and options:

- Keyword:
- Last Name:
- First Name:
- Customer #:
- Email:
- Phone:
- City:
- Zip:
- Member #:
- Membership:
- Exact Name Match:
- Show Disabled Customers:
- Include Related Customers:

A "Search" button is located below the input fields.

Last Name	First Name	Customer #	Email	Address	Related
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* indicates customer has orders

Buttons: View, Add New, OK, Cancel

POS

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

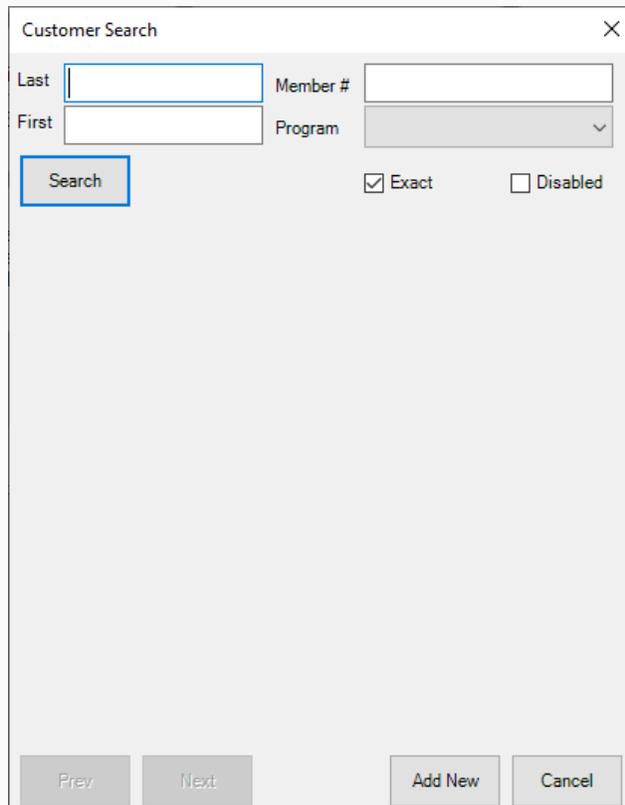
2) Click the **POS** icon.



3) Click the **Search** icon.



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



Customer Search

Last Member #

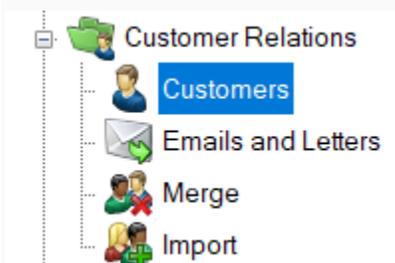
First Program

Exact Disabled

Administration

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

2) Expand the **Customer Relations** folder and click the **Customers** icon.



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

Last Name:	<input type="text"/>	City:	<input type="text"/>	Member #:	<input type="text"/>
First Name:	<input type="text"/>	State:	<input type="text"/>	Membership:	<input type="text"/>
Phone:	<input type="text"/>	Zip:	<input type="text"/>	Exact Name Match	<input checked="" type="checkbox"/>
Email:	<input type="text"/>	Customer #:	<input type="text"/>	Search For Business	<input type="checkbox"/>
Records Per Page:	20	<input type="button" value="Search"/>	Show Disabled Customer	<input type="checkbox"/>	

LastName	First Name	Customer #	Street 1	City	State	Zip	Parent Name
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* indicates customer has orders

NOTE: If the customer is not coming up, try searching for a limited amount of information (ex. last name only). To broaden the search range, do not check the Exact Name Match or Search For Business boxes.