

Locate A Customer

Last Modified on 07/06/2022 4:39 pm PDT

Go to **Customers** and scroll down to view all customers.

To locate a customer:

1. Select the filter icon.
 2. Choose and enter the search criteria. You can search the Customer by the *Customer ID, Customer First Name, Customer Last Name, Customer Firm Name, Email, Phone, Default Account Number, Created By, Date Created*, or *Search*.
 3. Click on **Add Filter**.
-