

## **CRM – Search Person**

**Purpose:** Before entering a new contact card, use the Search Person feature to determine if that record already exists.

Step	Action		
1.	Navigate to the <b>Search Person</b> page. Select <b>Main Menu &gt; Customers CRM &gt; Search Person.</b>		
	<b>Result:</b> The <b>Search Person</b> page displays.		
	Search Person		
	▼ Search Results		
	No results have been found or no search has been performed.		
	Add Person		
	▼ Search		
	Use Saved Search		
	Search Clear Save Search Criteria 🗊 Delete Saved Search 🥀 Personalize Search		
	Case Sensitive		
		_	
	First Name begins with		
	Last Name begins with 👻		
	Phone = •		
	Address begins with		
	Title begins with		
	Person ID =		
	Empl ID =		
	SetID =		
	Customer ID =		
	Customer Status =		
	Merge Status = 🔹 👻		
2.	Enter First Name and Last Name at a minimum.		
	Note: If a common name, enter additional data like address, city, or state.		

## Job Aid – CRM Search Person



Step	Action	
3.	Click the <b>Search</b> button.	
	D	
	<b><i>Result:</i></b> The following tat	ble describes possible results.
	II	The metabing record outomatically anona
	with that name	Person (Consumer)
	with that hame	Save   300 360-Degree View   Q Search   🚔 Academics   ûm Test Scores   >> Personalize
		Name         Scooby Doo         Phone Number         313/273-4000           Email Address         scooby.doo@gmail.com         Customer ID         300289           Campus ID         Employee ID
		Person         Tasks         Call Reports         Billing Accounts         Notes         Contact Info         Relationships         More Info           Primary         Details         User Profiles         Credit Cards         Purchasing Info         Tax Exempt Certificate         Employments
		Person Information
		Salutation  *First Name Scooby Middle Name Dog
		*Last Name Doo Suffix
		Employer Title Date of Birth 11/18/1993 B Age 16 Gender Male
		More Names
		Contact Info Entries *Description Home More
		Phone Address
		Type         Code         Number         Ext/PIN         Q         Look up Address           Permanen V         313/273-4000         *Type         Permanent Home         V
		Mobile   Mobile   Mobile  Mobi
		FAX  Address 1: 900 Crime Street Address 2:
		Other  Address 3:
		*Type Email Address County:
		Home    scooby.doo@gmail.com  State: MI Q. Michigan  Postal: 65221
		Other •
		<u>Set Display</u>
	More than one person	A list of all matches displays.
	exists with the same	Search Person First Name begins with any AND Last Name begins with fezgerald
	first/last name	* Search Results Last Name First Name Number Address Line 1 Okracter Oty Okracter State
		Pizzaenšká Amy 641/236-5718 1924 6th Ave Grinnell IA
		Salact the appropriate match to view the person record
	No one exists with that	The following message displays: No results have been found
	name	or no search has been performed
	name	or no scaren nas been pertormen.