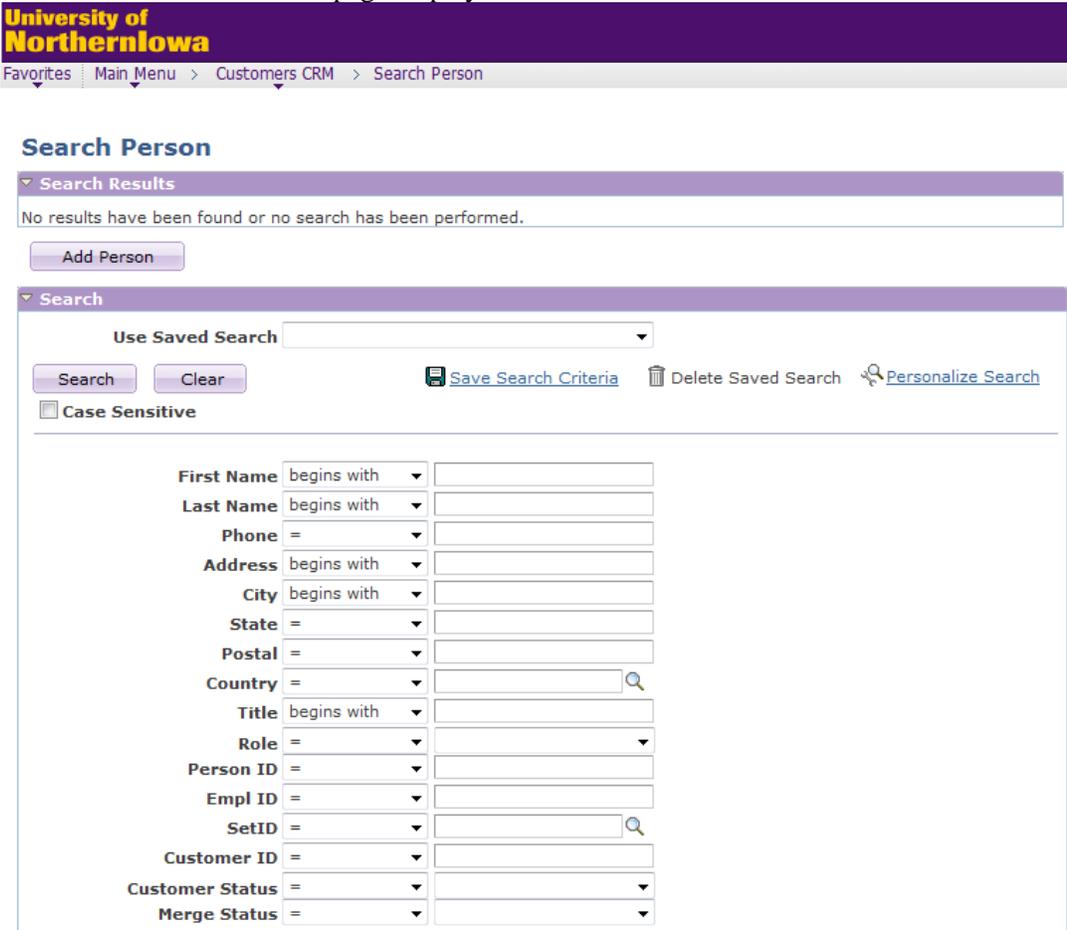
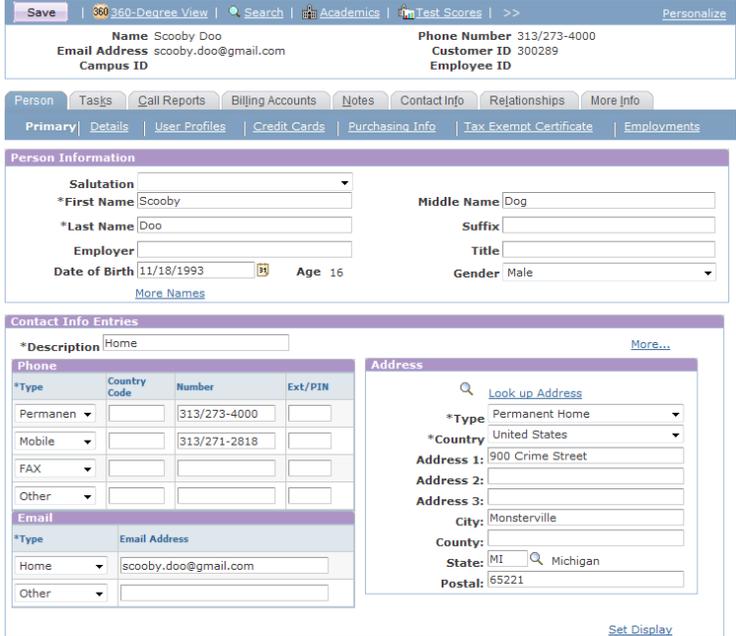
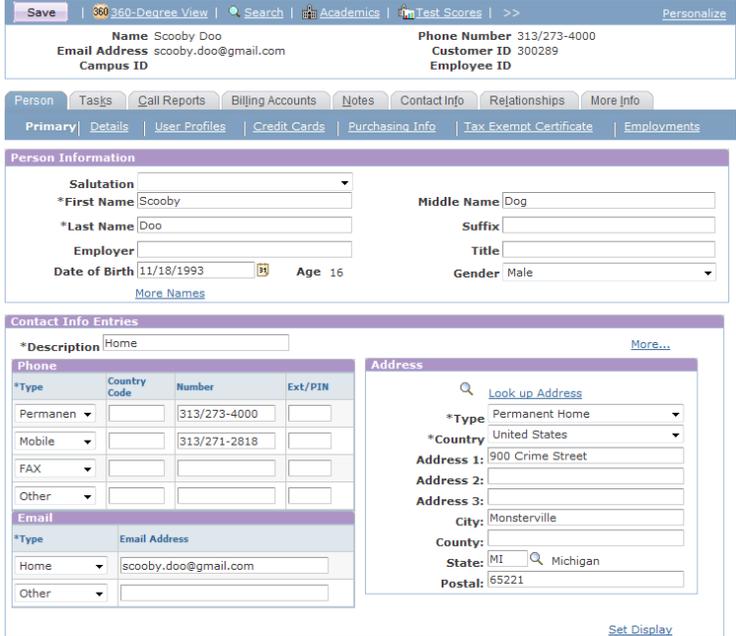
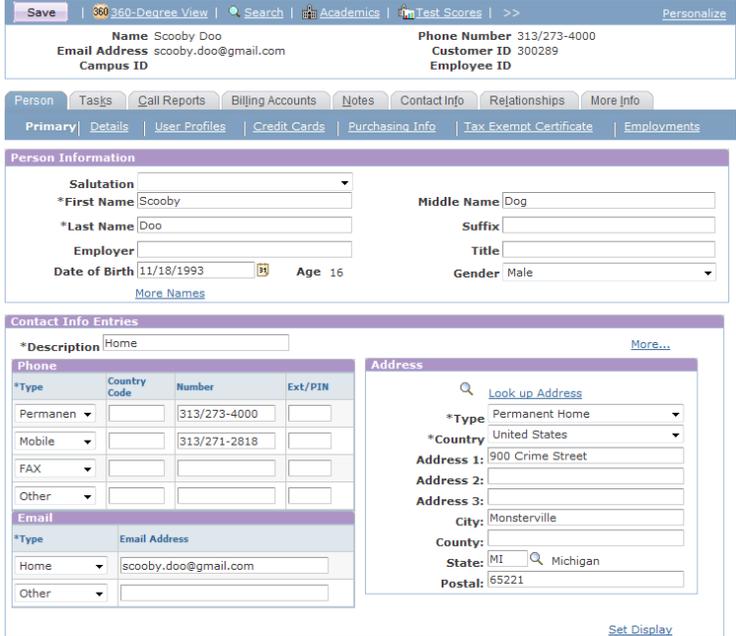


CRM – Search Person

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

Step	Action
1.	<p>Navigate to the Search Person page. Select Main Menu > Customers CRM > Search Person.</p> <p>Result: The Search Person page displays.</p> 
2.	<p>Enter First Name and Last Name at a minimum.</p> <p>Note: If a common name, enter additional data like address, city, or state.</p>

Step	Action																																
3.	<p>Click the Search button.</p> <p>Result: The following table describes possible results.</p> <table border="1" data-bbox="354 407 1419 1360"> <thead> <tr> <th data-bbox="354 407 651 443">If...</th> <th data-bbox="651 407 1419 443">Then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="354 443 651 1178">Only one person exists with that name</td> <td data-bbox="651 443 1419 1178"> <p>The matching record automatically opens.</p> <p>Person (Consumer)</p>  </td> </tr> <tr> <td data-bbox="354 1178 651 1360">More than one person exists with the same first/last name</td> <td data-bbox="651 1178 1419 1360"> <p>A list of all matches displays.</p> <p>Search Person</p> <p>First Name begins with amy AND Last Name begins with fitzgerald</p> <table border="1" data-bbox="667 1241 1403 1331"> <thead> <tr> <th>Last Name</th> <th>First Name</th> <th>Number</th> <th>Address Line 1</th> <th>Alternate Character Address 1</th> <th>City</th> <th>Alternate Character City</th> <th>State</th> </tr> </thead> <tbody> <tr> <td>Fitzgerald</td> <td>Amy</td> <td>641/226-5718</td> <td>1924 6th Ave</td> <td></td> <td>Grinnell</td> <td></td> <td>IA</td> </tr> <tr> <td>Fitzgerald</td> <td>Amy</td> <td></td> <td>124 Penn Lane</td> <td></td> <td>Macomb</td> <td></td> <td>IL</td> </tr> </tbody> </table> <p>Select the appropriate match to view the person record.</p> </td> </tr> <tr> <td data-bbox="354 1360 651 1438">No one exists with that name</td> <td data-bbox="651 1360 1419 1438"> <p>The following message displays: No results have been found or no search has been performed.</p> </td> </tr> </tbody> </table>	If...	Then...	Only one person exists with that name	<p>The matching record automatically opens.</p> <p>Person (Consumer)</p> 	More than one person exists with the same first/last name	<p>A list of all matches displays.</p> <p>Search Person</p> <p>First Name begins with amy AND Last Name begins with fitzgerald</p> <table border="1" data-bbox="667 1241 1403 1331"> <thead> <tr> <th>Last Name</th> <th>First Name</th> <th>Number</th> <th>Address Line 1</th> <th>Alternate Character Address 1</th> <th>City</th> <th>Alternate Character City</th> <th>State</th> </tr> </thead> <tbody> <tr> <td>Fitzgerald</td> <td>Amy</td> <td>641/226-5718</td> <td>1924 6th Ave</td> <td></td> <td>Grinnell</td> <td></td> <td>IA</td> </tr> <tr> <td>Fitzgerald</td> <td>Amy</td> <td></td> <td>124 Penn Lane</td> <td></td> <td>Macomb</td> <td></td> <td>IL</td> </tr> </tbody> </table> <p>Select the appropriate match to view the person record.</p>	Last Name	First Name	Number	Address Line 1	Alternate Character Address 1	City	Alternate Character City	State	Fitzgerald	Amy	641/226-5718	1924 6th Ave		Grinnell		IA	Fitzgerald	Amy		124 Penn Lane		Macomb		IL	No one exists with that name	<p>The following message displays: No results have been found or no search has been performed.</p>
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