Customer Search

The search tool allows you to perform simple or complex searches for Customers and Vendors.

 There are two tabs on this form; AR Search and AP Search. The AR Search is used to locate your customer records. The AP Search is used to locate vendor records. More information on the AP Search is located in the Accounts Payable section of this help tool.

The AR Search is launched by any of the following methods:

1. Clicking on the Binoculars icon on the main application toolbar.

2. Typing in a Name or Customer Number in the search Text box on the main application toolbar.

3. From the Client Management module, click on the Customer Explorer option.

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Search Methods

There are two types of search methods. Each search method is described below

- Simple View - when selecting this option, the application will only search for records related to the Customer Name or Customer Number fields.

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- Advanced View - when selecting this option, a drop-down list is provided in the Search For field to try a locate a customer based upon many other criteria.

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SImple View

When opting to use the Simple View method, searches may only be performed using the Customer Name or Customer Number. You do have the ability to use one of the three Search Methods; "Begins With", "Contains", and "Exact".

The search method "Contains" will examine the data to find the Customer based upon the information entered into the search text box.

SImple View - "Contains" Method

For example, if we select Contains as our "Search Method" and type in the word Smith in the search text box, the results returned would be any Customer where the word Smith is found in the Customer Name field. This would include the following examples:

George Smith

Smith, Mary

AL Smith & Associates

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Simple View - "Begins With" Method

When opting to use the Simple View method, searches may only be performed using the Customer Name or Customer Number. You do have the ability to use one of the three Search Methods; "Begins With", "Contains", and "Exact".
The search method "Begins With" will examine the data to find the Customer based upon the information entered into the search text box.
For example, if we select Begins With as our "Search Method" and type in the word Smith in the search text box, the results returned would be any Customer where the Customer Name begins with the word Smith. This would include the following examples:
Smith Brothers
Smith College
Smith, Margarita

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Simple View - "Exact" Method

When opting to use the Simple View method, searches may only be performed using the Customer Name or Customer Number. You do have the ability to use one of the three Search Methods; "Begins With", "Contains", and "Exact".
The search method "Exact" will examine the data to find the exact information entered into the search text box in the Search For area selected.
For example, if we select Exact as our "Search Method" and type in the words Smith, Caroline in the search text box, the results returned would any Customer with the name Smith, Caroline. If there is more than one customer with this exact name spelling, they will be listed in the search results list.

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Advanced View

Advanced View - "Contains" Method

The Advanced View allows customer searches to be performed using a combination two operators: Search For and the Search Method. You may also search using multiple "Search For" options.
In the "Search For" field are several choices on the drop-down list. The default is Customer. Depending on which "Search For" option is selected will determine where the search engine will look in your database to try and locate the Customer record.
The Search Method tells the search engine how to locate the customer based upon the selected "Search For" option.
For example, if we select Customer as our "Search For" and Contains as our "Search Method" and type in the word Smith in the search text box, the results returned would be any Customer where the word Smith is found in the Customer Name field. This would include the following examples:
George Smith
Smith, Mary
AL Smith & Associates

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Advanced View - "Begins With" Method

The search method "Begins With" will examine the table field (in your database) which corresponds to the "Search For" option selected from the drop-down list, to try and find a match based upon the Search Text entered by the User.

For example, you are wanting to search with the Customer option, and your company enters residential type customers as last name followed by a comma and then the first name, then that is the order that should be used to find the customer when selecting "Begins With".
In the example below, a search on Smith returned residential customers whose last name begins with Smith in addition to commercial customers whose name begins with Smith.

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Advanced View - "Contains" Method

The search method "Contains" will examine the data to find the information entered into the search text box in the Search For area selected.
For example, if we select Customer as our "Search For" and Contains as our "Search Method" and type in the word Smith in the search text box, the results returned would be any Customer where the word Smith is found in the Customer Name field. This would include the following examples:
George Smith
Smith, Mary
AL Smith & Associates

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Advanced View - "Exact" Method

The search method "Exact" will examine the data to find the exact information entered into the search text box in the Search For area selected.
For example, if we select Customer as our "Search For" and Exact as our "Search Method" and type in the words Smith, Caroline in the search text box, the results returned would any Customer with the name Smith, Caroline. If there is more than one customer with this exact name spelling, they will be listed in the search results list.

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Advanced View - Multi Criteria Search

When using the Advanced View, you have the ability to search for a customer using one or more of the following options:
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Clicking on the Add Criteria button at the upper left of the form allows you to add more criteria to try and locate the desire customer record.

In the example below, we are using three separate criteria (Search For) elements. We are searching for customers

- in the MI Branch
- where the customer Type contains the word Residential and
- the System record contains the word Radio.