Customer Find Filter

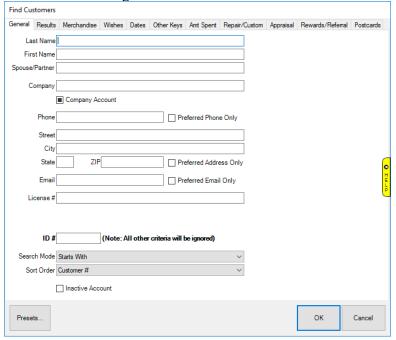
Introduction

The **Customer Find** filter allows you to search for customers based on a large range of criteria. It appears in numerous places throughout the software, especially in marketing related areas (e.g. postcards, exports, mailings, etc) and reports. Learning to master this filter is critical to getting the most out of the software.

Tab Breakdown

General

Used to search on general criteria.



Fields and options include:

Last Name Search by last name

First Name Search by first name

Spouse/Partner Search by customer's spouse/partner

Company Search by company name

Company Select whether to include customers marked as company accounts

Account Checked - Only include company accounts

Unchecked - Do not include company accounts

Square Check - Include customers & company accounts

Phone Search by phone number

Preferred Only return customer's primary phone number in search results; if

Phone Only unchecked it will instead display one row for each phone number on file, i.e.

same customer could be listed multiple times

Street Search by street address

City Search by city

State Search by state

ZIP Search by ZIP or postal code

Preferred Only return customer's primary address in search results; if unchecked it **Address Only** will instead display one row for each address on file, i.e. same customer

could be listed multiple times

Email Search by email address

Preferred Only return customer's primary email in search results; if unchecked it will

Email Only instead display one row for each email on file, i.e. same customer could be

listed multiple times

License # Search by driver's license number

ID # Bring up a specific customer by their customer ID; all other criteria will be

ignored

Search Mode Whether to search by exact match or partial match, options include:

Exact Match Only return records that exactly match all entered

Only criteria

Starts With Return records whose fields start with entered criteria
Ends With Return records whose fields end with entered criteria
Contains Return records that match any portion of entered criteria

Sort Order Controls how resulting list is sorted.

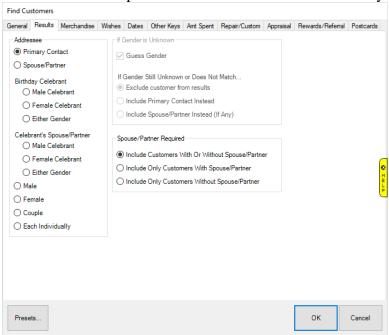
Inactive Select whether to include inactive (disabled) accounts

Account Checked - Only include inactive accounts

Unchecked - Do not include inactive accounts Square Check - Include inactive & active accounts

Results

Defines how to search and display customer records. This is useful for doing targeted marketing. For example, you could use this in conjunction with the **Dates** tab to do a mailing campaign directed at female spouse's whose husbands have a birthday coming up next month.



Options are divided into three sections.

Addressee:

Primary Contact Displays the primary contact on the customer record

Spouse/Partner Displays the spouse of the primary contact

Birthday Celebrant Displays the birthday celebrant regardless of whether they are

primary or spouse

Male Celebrant Only display males Female Celebrant Only display females Either Gender Display all celebrants

Spouse/Partner

Celebrant's Displays the spouse of the birthday celebrant Male Celebrant Only display males

Female Celebrant Only display females Either Gender Display all celebrants

Male Only display male customers

Female Only display female customers

Couple For customers with a spouse/partner, this will display them as a couple on a single row

Each Individually Display each primary or spouse on their own row

If Gender is Unknown:

Guess Instructs software to guess gender based on name if no gender on file **Gender**

If Gender Determine what to do if gender cannot be determined; you can exclude,

still include, or include their spouse/partner instead regardless of Addressee option

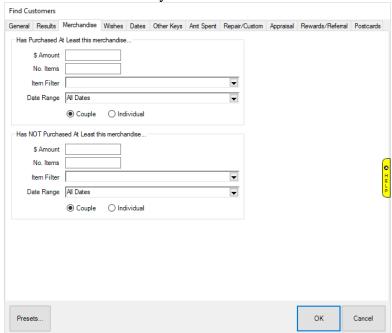
unknown chosen

Spouse/Partner Required:

Specify whether to include customers regardless of whether or not they have a spouse, or only include those with spouses, or only include those without spouses

Merchandise

Search customers based on their inventory purchase history. Unlike the **Amt Spent** tab, this does not look at non-inventory transactions.



Fields and options are divided into two sections.

Has purchased at least this merchandise:

\$ Amount Include customers who have spent at least this much

No. Items Include customers who have purchased at least this many items

Item Filter Opens the item filter allowing you to include customers based on specific sold item criteria

Date Range Include customers who have made a purchase in this time period

Couple/Individual Controls whether purchases should be calculated individually or as a joined account (couple)

Has NOT purchased at least this merchandise:

\$ Amount Include customers who have not spent at least this much

No. Items Include customers who have not purchased at least this many items

Item Filter Opens the item filter allowing you to exclude customers based on

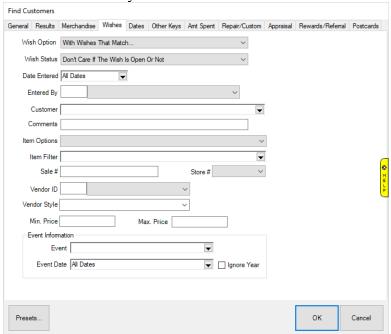
specific sold item criteria

Date Range Include customers who have not made a purchase in this time period

Couple/Individual Controls whether purchases should be calculated individually or as a joined account (couple)

Wishes

Search customers by the items saved on their wish lists.



Fields and options include:

Wish Specify whether you are searching for wishes that match or do not match the **Option** criteria entered on this tab

Wish Include customers with wishes that are open, closed (i.e. bought), or include **Status** both

Date Include customers with wishes entered during a specific time period **Entered**

Enter By Include customers with wishes entered by a specific associate

Comments I	Include customers	with wishes t	that include	these comments
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Item Determine whether to include customers whose wishes are in inventory, not in

Options inventory, or include both

Item Filter Opens the item filter allowing you to include customers based on more specific item information

- Sale # Only include customers with wishes originating from this sale number
- **Store** # Include customers with wishes from this store number

Vendor ID Include customers with wishes for this vendor

Vendor Include customers with wishes for this vendor style number Style

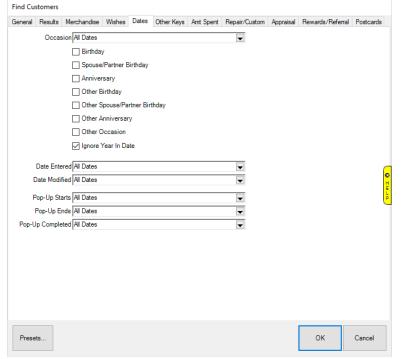
Min / Max Include customers with wishes between this retail price range **Price**

Event Include customers with wishes designated for specific events (e.g. mother's day, anniversary, birthday)

Event Include customers with wishes for one or more events that falls within this date **Date** range; use checkbox if you want to ignore year

Dates

Search for customers based on a variety of date related criteria.



Fields and options include:

Occasion Include customers who have occasions within the specified date range; works in conjunction with checkboxes below it to filter by specific occasion types

Date Include customers who were added during a specified date range **Entered**

Date Include customers who records were last modified during a specified date range **Modified**

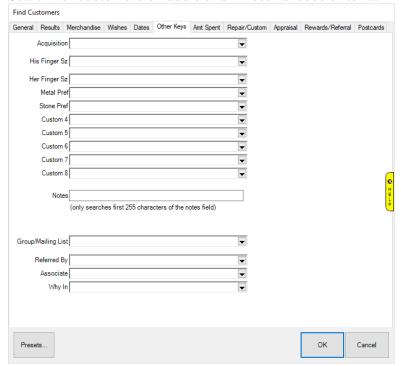
Pop-Up Include customers whose records have a pop-up that starts in this date range **Starts**

Pop-Up Include customers whose records have a pop-up that ends in this date range **Ends**

Pop-Up Include customers who records have a pop-up that was marked done in this date **Completed** range

Other Keys

Search for customers on additional miscellaneous criteria.



Fields and options include:

Acquisition Include customers based on their acquisition (very first why-in)

Custom 0 - 8 Include customers based on custom fields; these can be renamed in System Options; if not renamed, Custom 0 will display as Cust Type

Notes Include customers with matching notes (only first 255 characters is searched)

Group/Mailing Include customers based on a group or mailing list **List**

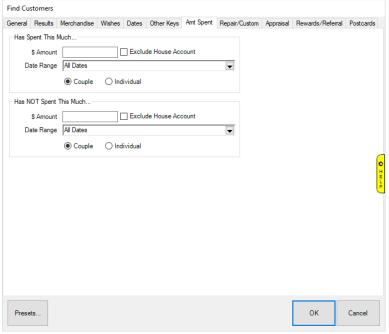
Referred By Include customers based on who referred them

Associate Include customers based on what associate is assigned to them

Why In Include customers whose visit to the store was recorded by a particular why-in

Amount Spent

Search customers based on the amount spent at the store regardless of transaction type. For a more refined search based on inventory purchases use the **Merchandise** tab.



Fields and options are divided into two sections.

Has spent this much:

\$ Amount Includes customers who have spent at least this amount

Exclude House Check this to exclude house accounts from counting towards dollars **Account** spent

Date Range Include customers who have spent this amount during this date range

Couple/Individual Controls whether amount spent should be calculated individually or as a joined account (couple)

Has NOT spent this much:

\$ Amount Includes customers who have not spent at least this amount

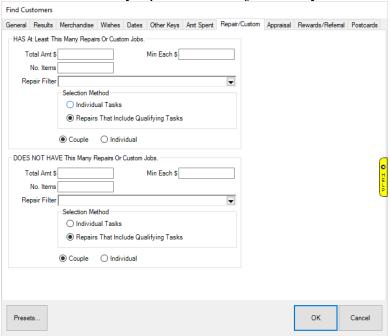
Exclude House Check this to exclude house accounts from counting towards dollars **Account** spent

Date Range Include customers who have not spent this amount during this date range

Couple/Individual Controls whether amount spent should be calculated individually or as a joined account (couple)

Repair/Custom

Search customers by repair or custom job activity.



Fields and options are divided into two sections.

Has at least this many repairs or custom jobs:

- **Total Amt \$** Includes customers who have spent at least this total amount on all repair or custom jobs
- **Min Each \$** Includes customers who have spent at least this much on a single repair or custom job
 - **No. Items** Includes customers who have had at least this many repairs or custom jobs
- **Repair Filter** Opens the repair filter which allows you to specify additional criteria (e.g. repair tasks, dates) for repairs or custom jobs
- **Selection Method** Controls whether selection criteria applies to individual repair tasks or to entire repair (e.g. if you define a Min Each \$ of \$100, do you only want repairs with individual tasks of \$100 or greater, or repairs with total of all tasks that is \$100 or greater)

Couple/Individual Controls whether repair and custom jobs should be calculated individually or as a joined account (couple)

Does not have this many repairs or custom jobs:

Total Amt \$ Includes customers who have not spent at least this total amount on all repair or custom jobs

Min Each \$ Includes customers who have not spent at least this much on a single repair or custom job

No. Items Includes customers who have not had at least this many repairs or custom jobs

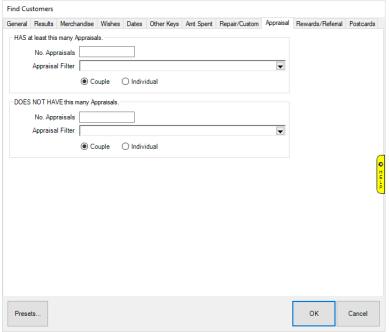
Repair Filter Opens the repair filter which allows you to specify additional criteria (e.g. repair tasks, dates) for repairs or custom jobs

Selection Method Controls whether selection criteria applies to individual repair tasks or to entire repair

Couple/Individual Controls whether repair and custom jobs should be calculated individually or as a joined account (couple)

Appraisal

Search customers by appraisal activity.



Fields and options are divided into two sections.

Has at least this many Appraisals:

No. Appraisals Include customers who have had at least this many appraisals

Appraisal Filter Opens the appraisal filter allowing you to specify additional criteria

Couple/Individual Controls whether appraisals should be counted individually or as a joined account (couple)

Does not have this many Appraisals:

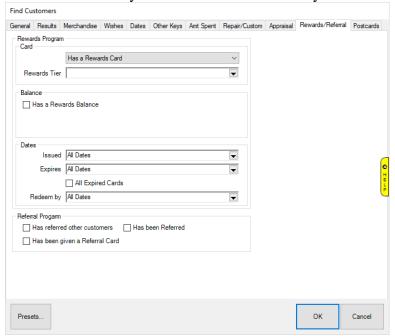
No. Appraisals Include customers who have not had at least this many appraisals

Appraisal Filter Opens the appraisal filter allowing you to specify additional criteria

Couple/Individual Controls whether appraisals should be counted individually or as a joined account (couple)

Rewards/Referral

Search customers by reward/referral card activity.



Fields and options include:

Card Include customers regardless of whether or not they have rewards card, or only include customers with rewards cards, or only include customers without; many of the other fields and options only display if this is set to 'Has a Rewards Card'

Rewards Include customers from one or more reward tiers

Tier

Has a Check this to only include customers that have a rewards balance

Rewards

Balance

Issued Include customers with a card issued in this date range

Expires Include customers with a card that expires in this date range

All Check this to include all customers with expired cards

Expired

Cards

Redeem Include customers with a rewards card that must be redeemed in this date range **By**

Has Include customers that have referred someone else

referred

other

customers

Has been Include customers that have been referred to your store by someone else **Referred**

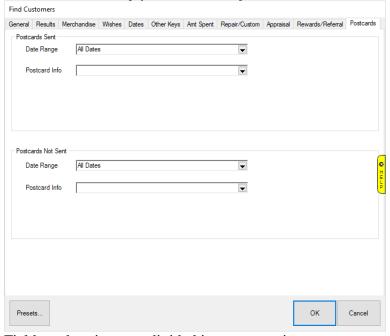
Has been Include customers that have been given referral cards given a

Referral

Card

Postcards

Search customers by postcard activity.



Fields and options are divided into two sections.

Postcards sent:

Date Range Include customers who were sent postcards in this date range

Postcard Info Include customers who sent specific postcard types (can choose multiple)

Postcards not sent:

Date Range Include customers who were not sent postcards in this date range

Postcard Include customers who were not sent specific postcard types (can choose Info multiple)