

Locate A Customer

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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 either 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**.
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