

# Searching for an existing customer using the Sales Manager

Begin by clicking on **New/Search** under the **Customers** Tab on the top left side of the screen

The screenshot shows the Windowizard 2.0 Sales Manager interface. The top navigation bar includes Home, My Account, Products, Orders, Resources, Sales Manager, and About Us. The Sales Manager tab is active, and the Customers sub-tab is selected. The left sidebar contains a navigation menu with options like New/Search, List, Leads, Map, Prospects, Sales Calls, Outstanding Proposals, and Time Management. The main content area displays a table of leads with columns for Date of Call, #, Customer, Job No, Address, Phone, Assigned To, Actual Call Date, and Sales Value. A search icon is visible in the top left of the main content area.

Date of Call	#	Customer	Job No	Address	Phone	Assigned To	Actual Call Date	Sales Value
21/11/2014	210	Ms Tricia Tawin	Test			nigelb		
19/11/2014	222	Ms Tricia Tawin	practice	5 Kotzikas Place	0292001550	kath	Thu 20 Nov (12:00-13:00)	
16/11/2014	210	Ms Tricia Tawin	Job1			kath		
14/11/2014	223	Mr pearl blog	blog 3	45 Purni Street		karenj		
11/11/2014	226	Miss Kathryn boyte	test	145 Rangitikei Street		kath	Wed 12 Nov (10:00-11:00)	
11/11/2014	227	Ms Steve Brown	SteveD	36 Cameron Road		steved	Tue 11 Nov (15:30-16:30)	
07/11/2014	225	Mr Ian Veint (1)	123	5 Kotzikas Place		ianv	Fri 07 Nov (10:00-11:00)	\$1,000
06/11/2014	224	Miss Tricia Tawin (MCP)	Friday task	Kahu Street	0800262620	triciat	Fri 14 Nov (10:00-11:00)	
28/10/2014	53	Mr Andy grinder	Grinder#2	Chesham Rd		hugovs		
23/10/2014	218	Mr Jo Brown	Brown	34 Graham Place	075700000	kath		
23/10/2014	220	Mr James Bond	JOB007	246 Charleston Street	027555007	andrew		
16/10/2014	1	Mrs Jeremy page	test:ineing Interchange	Three Springs Rd		jeremy		
15/10/2014	56	Mr Jeremy page	PageJ	5 Glebe Close		steved		\$2,500
22/09/2014	215	Mrs Samdra Rowlinson	test	1/681 Poutakataka Road		andreim		
12/09/2014	15	Mr ian veint	12345/ian	97 Tanner St		kath	Thu 11 Sep (11:00-12:00)	
12/09/2014	140	Ms Kath boyte	copy 2 Boyte	6 Mokokuna Grove		kath		
11/09/2014	140	Ms Kath boyte	123456	6 Mokokuna Grove	021841706	brennap		
02/09/2014	209	steph adding	adding	8 cecil road,	0211506160	peter		
01/09/2014	56	Mr Jeremy page	test5	5 Glebe Close		andreim		
28/08/2014	129	Serious Sam	Hey	28 Danger Lane		andrew		
11/08/2014	207	Ms Kath boyte	Boyte123	Thorndon Quay		kath	Tue 12 Aug (10:00-11:00)	

Find the **Surname** tab and enter the first letter of the customer you are trying to find, click the **search icon**

The screenshot shows the Windowizard 2.0 Sales Manager interface with a search modal open. The modal has fields for Contact, First Name, Surname, Address, Telephone, Email, Mobile, Cust No., and Account Name Business. A search icon is highlighted with a red box and an arrow pointing to it. The Surname field contains the letter 's'. The background shows the same list of leads as the previous screenshot.

Select customer from the list

The screenshot shows the 'windowizard 2.0' web application. The user is logged in as 'Jeremy Page' on 'WindowOnLine'. The interface includes a sidebar with navigation options: Home, Customers (New/Search/List), Leads (List/Map), Prospects (List/Map), Sales Calls (List/Map), Outstanding Proposals (List/Map), and Time Management (List/Map/Calendar/Reminders). The main content area is titled 'Details' and contains a search form with fields for Contact, First Name, Surname, Address, Telephone, Email, Mobile, Cust No., and Account Name Business. A 'Search' button is visible. Below the search form, a list of search results is displayed under the heading 'Surname Search: s'. The results include a note 'This is a new customer' and a list of 13 customer entries with their names, addresses, and contact information. At the bottom of the page, a table shows a list of customers with columns for Date, Job No, Consultant, Amount, Status, and Supplier.

Date	Job No	Consultant	Amount	Status	Supplier
01/09/2014	56	Mr jeremy page	test5	5 Glebe Close	andrem
28/08/2014	129	Serious Sam	Hey	28 Danger Lane	andrew
11/08/2014	207	Ms Kath boyte	Boyte123	Thorndon Quay	kath

Customer information and history will be displayed

The screenshot shows the 'windowizard 2.0' web application with the 'Details' page for a customer. The customer's information is displayed in the form fields: Contact (Mr), First Name (bob), Surname (sagget), Address (80 Marshland Rd, Shirley 8061, New Zealand), Telephone, Email, Mobile, Cust No. (42), and Account Name Business (taxation). Below the form, there is a 'Map' section and a 'History' table. The 'History' table shows a list of customer interactions with columns for Type, Date, Job No, Consultant, Amount, Status, and Supplier. At the bottom of the page, the same customer list table from the previous screenshot is visible.

Type	Date	Job No	Consultant	Amount	Status	Supplier	Actions
Lead	19/09/2011		davem		Open		[edit] [delete] [add]
Prospect	19/09/2011	test	davem		Open		[edit] [delete] [add]
Cold Prospect	19/09/2011	flwefefefef	davem		Cold /No follow-up		[edit] [delete] [add]