

## Search for a Customer

### **Abstract**

The purpose of this guide is to locate a customer in Toolkit using various search methods.

*Steps: Search county-wide Customer List – OR – Search by Name – OR – Search by Tract Number*

### **Details**

#### Searching by Customer List (County-Wide List)

1. After opening Toolkit, **click** the **Go** button.
2. Toolkit will prompt you to Login. Enter your *User ID* and *Password*.

Customer Service Toolkit

File Tools Reports Help

Check In/Out Folders

Search the National Conservation Planning Database for your service area

County: CLARK Customer or Business Name: Clear GO

Business ID: Tract Number:

3. A list of every customer in Toolkit, for that county, will be displayed.

This list can be sorted by clicking either the *Customer File* or *Customer Name* column header.

4. **Scroll** through the list to locate a customer file.

## Wisconsin Toolkit Task Guide

### Search by Customer or Business Name

1. In the *Customer or Business Name* field, type in the name of the customer and **click the Go** button.

Customer Service Toolkit

Tools Reports Help

Check In/Out Folders

Search the National Conservation Planning Database for your service area

County: PORTAGE Customer or Business Name: dorsho Clear GO

Business ID: Tract Number:

National Conservation Planning Database My Checked Out Fol

PORTAGE			
Status	Owner	Customer Name	Customer File
free	CHARLES E DORSHORST	\DORSHORST_CHARLES----	chi
free	ROBERT J DORSHORST	\DORSHORST_ROBDORSHOR	

**Note:** If your search does not return any results, type in only part of the name (it increases the chances of the search being successful)

### Search by Tract Number

1. In the *Tract Number* field, type in the number and **click the Go** button. Be specific, Toolkit needs an exact match for this search to work.

Customer Service Toolkit

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Check In/Out Folders

Search the National Conservation Planning Database for your service area

County: PORTAGE Customer or Business Name: Tract Number: 1355 Clear GO

Business ID:

National Conservation Planning Database My Checked Out Fol

PORTAGE			
Status	Owner	Customer Name	Customer File
free	CHARLES E DORSHORST	\DORSHORST_CHARLES----	chi