Customer Search

Why it matters: Search is the starting point for most customer-service work and the required first check before onboarding a new customer.

Search Walkthrough

1. Open the main sidebar or navigation menu.
2. Select **Search**.
3. Enter the best customer information available.
4. Review the matching results instead of opening the first result automatically.
5. Confirm the customer or company name, account number, and service address.
6. If the account has multiple locations, choose the correct service location.
7. Open the correct account.

Ways to Search

- Customer name or company name
- Account number
- Phone number, including partial digits shown on caller ID
- Email address
- Service address
- Labels
- Partial customer information or broad terms, when supported by your company setup

How to Read the Results

A green match, or "likeness" figure, may appear below a result. It estimates how closely the result matches the information entered. It is not the customer's balance, status, or account score. Always verify the identifying details yourself.

- If the first search does not work, try another identifier or use fewer characters.
- Select **Show Inactive** before deciding that the customer is not in KozyOps.
- An inactive result may be a former customer whose history is still retained.
- A customer may be linked to several locations. Select the address connected to the current request.
- The address shown with a result may be a billing address instead of a service location.
- Use the recently viewed account shortcut to return to an account without repeating the search.

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