Customer Lookup

Overview

The Customer Lookup provides you with a sortable, searchable table of customers that you are the salesrep for. From this table, you can enter the CounterCRM module for any one customer at a time by clicking on their Customer Number.

From within a customer's CounterCRM module, you can return to the Customer Lookup to select another customer's data to load.

Only customers that you have been appointed the Salesrep for will show up in this table.

Targeted Customers

This is the initial customer listing view and contains a complete list of customers assigned to a user's sales rep ID (or, all customers if viewing as an admin user) whose accounts have been flagged for one of 5 reasons

-  - These customers have been manually flagged to show in the targeted listing.
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- These customers have a 30 day balance owing that exceeds the max allowable 30 day balance.
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- These customers have a 60 day balance owing that exceeds the max allowable 60 day balance.
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- These customers have a 90 day balance owing that exceeds the max allowable 90 day balance.
-  - These customers have a percentage sales decrease greater than the max allowable sales decrease.

> All max values can be set in the CounterCRM maintenance and will default to the values set at a sponsor level in **CP2 Admin > Server Settings**

All Customers

This is a listing of all customers assigned to the user's sales rep ID. If the user is a manager level user, then it will be all customers assigned to sales reps for which they are the manager. Admin

users can see ALL customers

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