Searching for a customer

I have searched and found a customer that already exists in Customer FIRST but is linked to another Retailer.

1. Click on the **Search button**.

2. **Complete the search fields** as explained in the “Searching for Customer Records” Handy Guide #2

3. If the client appears with *** in the contact information, this means that the customer is not known at your retail site but if you are now in contact with the customer, you can get access to the record.

4. Click on the **drop down** and click **Get Access**.

5. When prompted, ask the customer for the answer to the **secret question** (which will be either their telephone number or email address) and enter the answer to be granted access to the customer account.

6. The account will then be available for you to click and open it.