Best Practice: Find the Customer by Phone Number

Ask, “What is the best phone number for your account?” and search that number before trying the customer’s name.

Why phone-first works

- Names are easily misspelled or may have several variations.
- Several customers may share a similar name.
- A phone number usually identifies the intended record faster.
- Using the existing profile keeps purchase history, loyalty, notes, and contact details together.

1. Click the customer search area.
2. Enter the phone number.
3. Compare the returned name and phone number with the customer.
4. Select the correct record.

Do not create a duplicate profile until you have searched the full phone number.

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