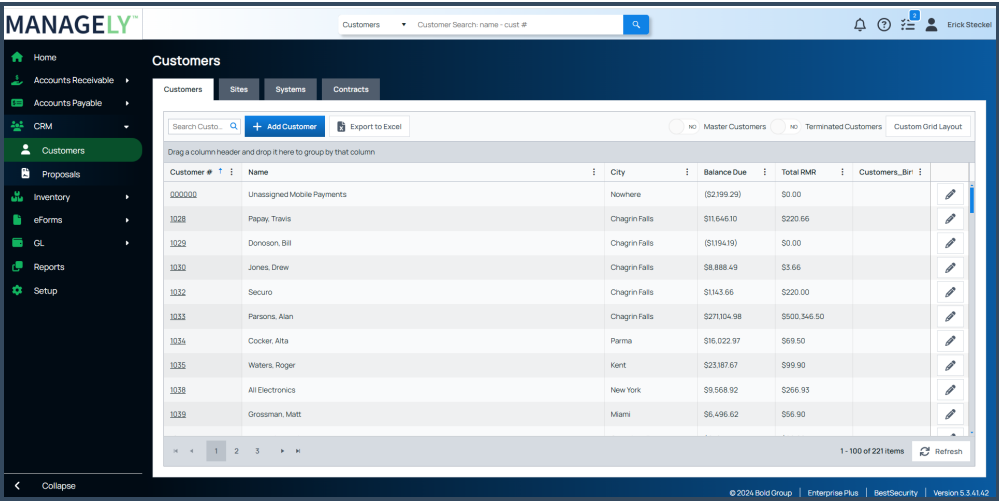


How to Search for Customers by City in Managely

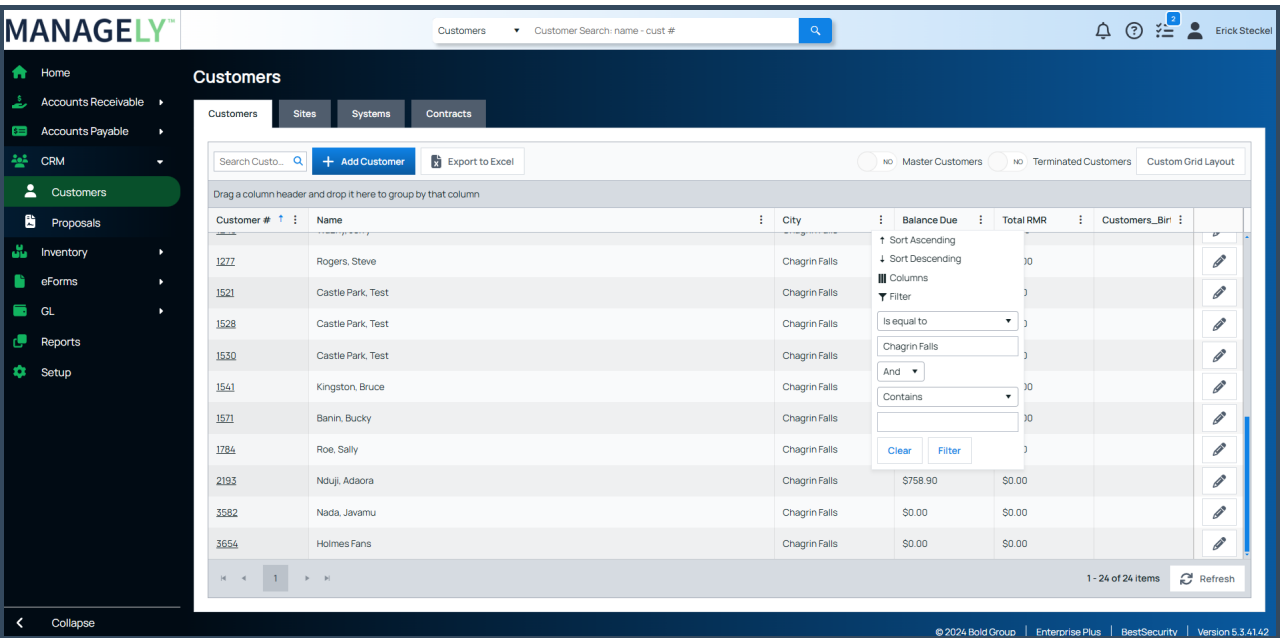
11/05/2024 5:46 pm EST

Follow the steps below to search for customers by city.

1. Click on CRM > Customers



2. Click the three vertical dots (ellipsis) to the right of the 'City' column
3. Hover over filter
4. Click on the 'contains' drop down and change this to 'is equal to'
5. Type in the city
6. Select the filter button



You will now see all your active customers in that city (in our example we have 23 customers that live in Chagrin Falls)

MANAGELY™

Customers

Customer Search name - cust #

🔍

🔔

🕒

👤 Erick Stecker

Home

Accounts Receivable

Accounts Payable

CRM

Customers

Proposals

Inventory

eForms

OL

Reports

Setup

Customers

Sites

Systems

Contracts

Search Custo... 🔍

+ Add Customer

📄 Export to Excel

☐ NO Master Customers

☐ NO Terminated Customers

Custom Grid Layout

Drag a column header and drop it here to group by that column:

Customer #	Name	City	Balance Due	Total RMR	Customers_Bir	
1272	Rogers, Steve	Chagrin Falls	\$4,921.13	\$93.00		✎
1521	Castle Park, Test	Chagrin Falls	\$63.93	\$0.00		✎
1528	Castle Park, Test	Chagrin Falls	\$0.00	\$0.00		✎
1530	Castle Park, Test	Chagrin Falls	\$0.00	\$0.00		✎
1541	Kingston, Bruce	Chagrin Falls	\$1,216.00	\$26.00		✎
1571	Bahrin, Bucky	Chagrin Falls	\$60.67	\$50.00		✎
1786	Roe, Sally	Chagrin Falls	(\$1.00)	\$0.00		✎
2133	Nduji, Adora	Chagrin Falls	\$758.90	\$0.00		✎
3582	Nadja, Javamu	Chagrin Falls	\$0.00	\$0.00		✎
3654	Holmes Fans	Chagrin Falls	\$0.00	\$0.00		✎

1 - 23 of 23 items Refresh

< Collapse

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