How to Search for Customers by City in Managely

Last Modified on 11/05/2024 5:46 pm EST

Follow the steps below to search for customers by city.

1. Click on CRM > Customers

A Home		Customers							
Accounts Receival	ole 🕨	Customers Sit	es Systems Contracts						
Accounts Payable									
🚰 CRM		Search Custo Q	+ Add Customer Export to Excel			NO Master Customers	NO Terminated C	Customers Custom G	rid Layout
Customers		Drag a column header	and drop it here to group by that column						
Proposals		Customer # † :	Name	:	City	Balance Due	Total RMR	Customers_Birl	
🔒 Inventory		000000	Unassigned Mobile Payments		Nowhere	(\$2,199.29)	\$0.00		ø
📔 eForms		1028	Papay, Travis		Chagrin Falls	\$11,646.10	\$220.66		ø
GL		1029	Donoson, Bill		Chagrin Falls	(\$1,194.19)	\$0.00		ø
P Reports		1030	Jones, Drew		Chagrin Falls	\$8,888.49	\$3.66		1
🔅 Setup		1032	Securo		Chagrin Falls	\$1,143.66	\$220.00		ø
		1033	Parsons, Alan		Chagrin Falls	\$271,104.98	\$500,346.50		ø
		1034	Cocker, Alta		Parma	\$16,022.97	\$69.50		ø
		1035	Waters, Roger		Kent	\$23,187.67	\$99.90		1
		1038	All Electronics		New York	\$9,568.92	\$266.93		1
		1039	Grossman, Matt		Miami	\$6,496.62	\$56.90		1

- 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

MA	NAGEL	Y۳		Customers	 Customer Search: name - cust # 		٩			¢ 🖗 💒	Erick S
<u>گ</u> A	lome Iccounts Receivable		Customers Customers Site	as Systems Contracts							
	accounts Payable		Search Custo Q	+ Add Customer Export to	o Excel			NO Master Customers	NO Terminated C	Customers Custom Gr	id Layout
:	Customers		Drag a column header	and drop it here to group by that column							
4	Proposals		Customer # 1 :	Name		:	City	: Balance Due :	Total RMR :	Customers_Birl :	8
a In	nventory		1277	Rogers, Steve			- Chagrin Falls	↑ Sort Ascending ↓ Sort Descending	0		<i>.</i>
e	Forms		1521	Castle Park. Test			Chagrin Falls	Columns	2		
G	GL		1528	Castle Park. Test			Chagrin Falls	Is equal to	•,		0
R	leports		1530	Castle Park. Test			Chagrin Falls	Chagrin Falls	Ξ,		6
S	etup		1541	Kingston, Bruce			Chagrin Falls	And V	0		6
			1571	Banin, Bucky			Chagrin Falls	Contains	• 10		di la caracteria de la
			1784	Roe, Sally			Chagrin Falls	Clear Filter			a de la companya de l
			2193	Nduji, Adaora			Chagrin Falls	\$758.90	\$0.00		0
								\$0.00	\$0.00		
			3582	Nada, Javamu			Chagrin Falls				
			<u>3654</u> ⊮ ∢ 1	Holmes Fans			Chagrin Falls	\$0.00	\$0.00	1 - 24 of 24 items 🔑	Refresh
	Collapse								1.0.0	lus BestSecurity	

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

Home Accounts Receivab Accounts Payable	Customers Customers Site	is Systems	Contracts								
CRM	Search Custo Q	+ Add Customer	Export to Excel				Master Customers	NO Termin	ated Ci	ustomers Custon	n Grid Layout
Customers	Drag a column header	and drop it here to group t	y that column								
🖺 Proposals	Customer # 1 :	Name		1	City	÷	Balance Due	Total RMR	1	Customers_Birl	:
Inventory	1277	Rogers, Steve			Chagrin Falls		\$4,92113	\$93.00			0
eForms	1521	Castle Park, Test			Chagrin Falls		\$63.93	\$0.00			1
	1528	Castle Park, Test			Chagrin Falls		\$0.00	\$0.00			ø
Reports	1530	Castle Park, Test			Chagrin Falls		\$0.00	\$0.00			ø
Setup	1541	Kingston, Bruce			Chagrin Falls		\$1,216.00	\$26.00			0
	1571	Banin, Bucky			Chagrin Falls		\$60.67	\$50.00			1
	1784	Roe, Sally			Chagrin Falls		(S1.00)	\$0.00			1
	2193	Nduji, Adaora			Chagrin Falls		\$758.90	\$0.00			ø
	3582	Nada, Javamu			Chagrin Falls		\$0.00	\$0.00			ø
	3654	Holmes Fans			Chagrin Falls		\$0.00	\$0.00			ø
	н н 1 э	н							1	- 23 of 23 items	C Refresh