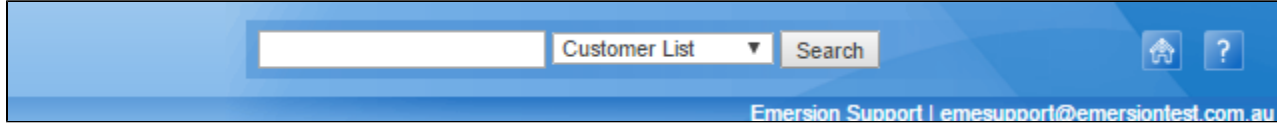


# Quick Search

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## Overview

The quick search is located within the top banner of Cumulus and can be accessed from an area within Cumulus.



Users can search within the following search categories:

- Customer List
- Invoice List
- Upload Reference
- Service Identifier
- BPAY Ref Number
- Export Reference
- User Portal Login

## Search Categories

### Customer List

Enter an account name or account ID, then choose **Customer List** from the options and press **Search**. Partial names can also be searched on. If more than one record matches the search criteria, the matching records will be displayed in the customer list for the user to choose from. If a single match is returned, the user will be taken straight to the [customer screen](#) for the matching account.

### Invoice List

Enter an invoice ID, then choose **Invoice List** from the options and press **Search**. Matching invoices will be displayed in a invoice list.

### Upload Reference

Enter an upload reference for a matching account, then choose **Upload Reference** from the options and press **Search**. Matching accounts will be returned in a list. The *Upload Reference* field is located on the [Customer > Details](#) tab.

### Service Identifier

Enter a service identifier for a service subscription, then choose **Service identifier** from the options and press **Search**. If the search finds a match, the user will be taken to the [service subscription](#) of the account.

Note: Special rules apply where service identifiers are actual phone numbers. Searching for an FNN (Full National Number) will also return results where the service identifier is in the format 0399991234. Searching on the short format will only return an FNN style result where the number is equal to 10 characters (otherwise the system will treat the search as a standard service identifier search).

### BPAY Ref Number

Enter a BPAY reference number for a customer, then choose **BPAY ref number** from the options and press **Search**. If the search is successful the matching account will be returned in a list. The *BPAY reference number* is located on the **Customer > Payment Methods > BPAY Details** tab.

### Export Reference

Enter an export reference number for a customer, then choose **Export reference** from the options and press **Search**. If the search is successful the matching account will be returned in a list. The *Export reference* field is located on the [Customer > Details](#) tab.

### User Portal Login

Enter the Customer's username for the End User Portal, then choose **Portal username** from the options and press **Search**. If the search is successful the matching account will be returned. The *Portal username* field is located on the **Customer > Portal** tab.

## Related Pages

- [Account Fundaments](#)
- [Show Trading Name Only](#)
- [Payment Plans Fundamentals](#)
- [Batch Mediation System](#)
- [BPay Fundamentals](#)
- [Rate Card Fundamentals](#)
- [Account Invoice Period](#)
- [ConnectWise Accounts and Contact Sync Fundamentals](#)
- [Product Fundamentals](#)
- [Service Access Fee Multiplier Fundamentals](#)
- [Ordering Fundamentals](#)
- [Service Plans](#)
- [Invoice Rebilling Fundamentals](#)
- [Commissions Fundamentals](#)
- [Manage Commissions](#)