Look Up an Account
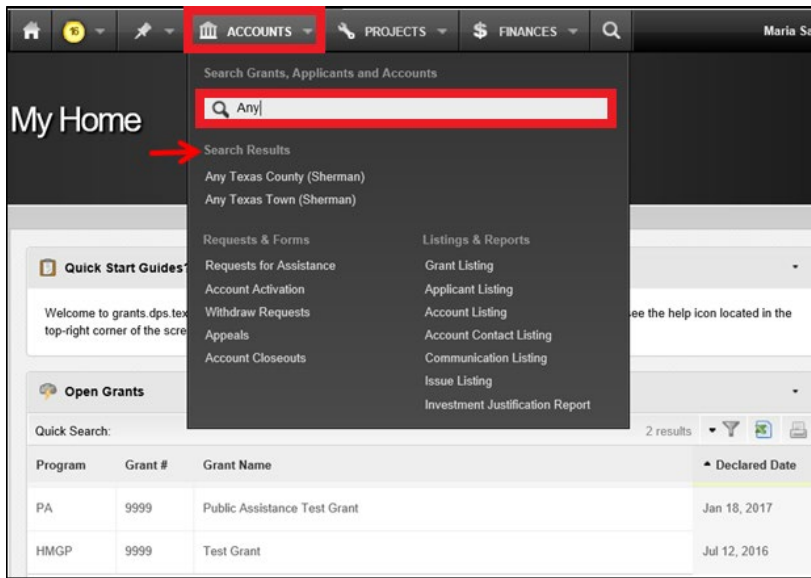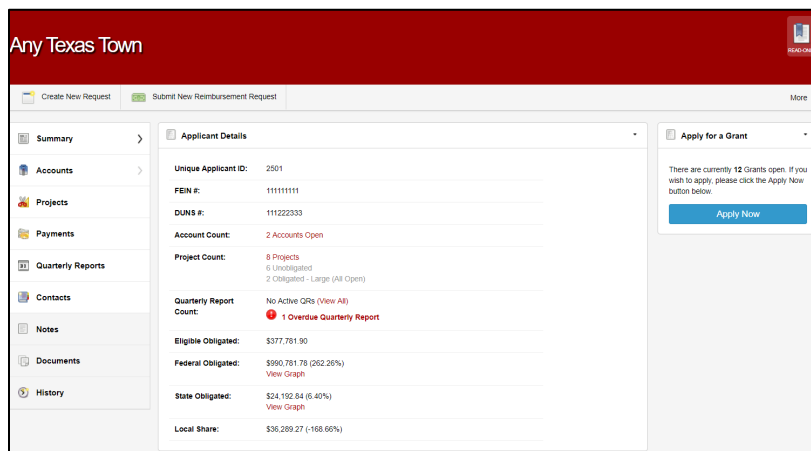
Click the *"Accounts"* menu located on the **Main Menu** bar, then perform either a **1) Quick Search** or generate an **2) Account Listing** report.

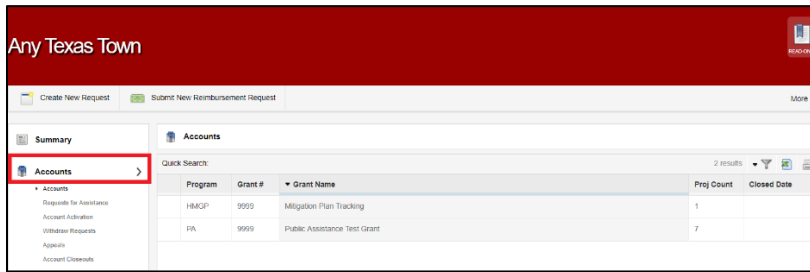1. **Quick search:** Click the *"Accounts"* menu located on the **Main Menu** bar, and enter some or the entire Applicant Name in the white search bar. Results will display dynamically below the search bar as you type. Choose an option.
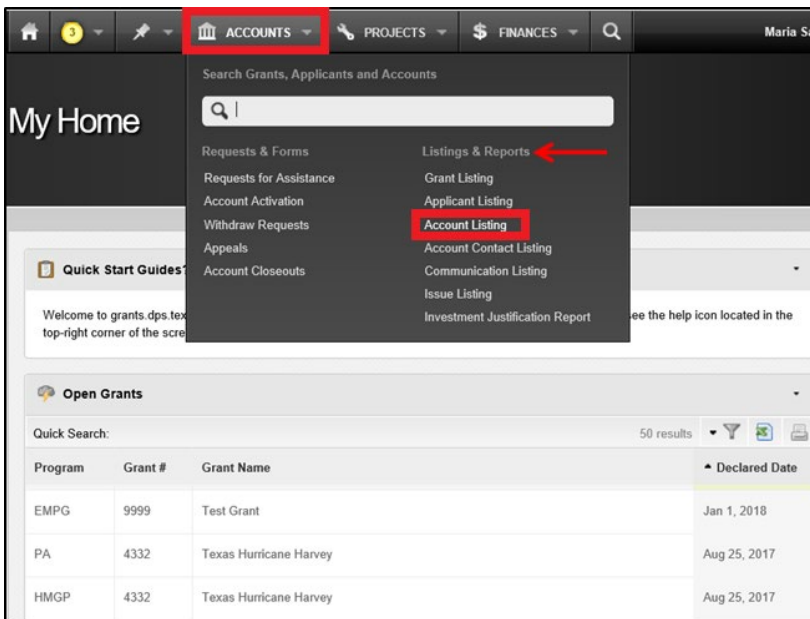

a. Once an option has been selected from the search results, a screen will be displayed with the **Applicant Details**.

b. Click the *"Accounts"* tab to view a listing of all **Accounts** for this Applicant.

2. **Account Listing Report:** Click the *"Accounts"* menu located on the **Main Menu** bar, then click on *"Account Listing"* located under **Listings & Reports**.

a. A list of **Accounts** will display. If you are the contact for multiple entities, all accounts for all your entities will display. Click any of the column headings to sort by that heading. (*The columns can be sorted in ascending or descending order.)*