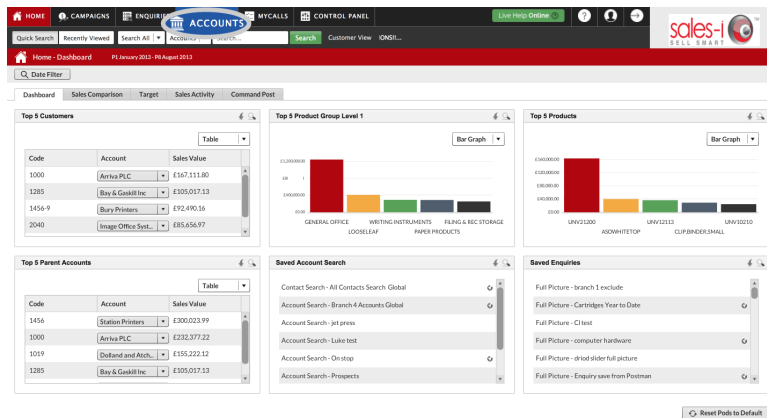


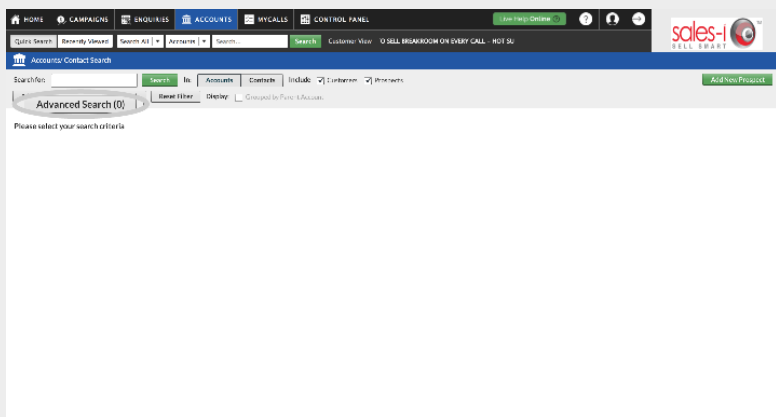
HOW TO SEARCH FOR ALL OF YOUR ACCOUNTS IN A CERTAIN AREA - DESKTOP

Did you know you can search for all your accounts (prospects or customers) in a certain area? So, if you're due to see a customer, why not run a zip/post code or town search to see if there are any accounts nearby to visit.

01 From the black navigation bar at the top of the screen, click **Accounts**.



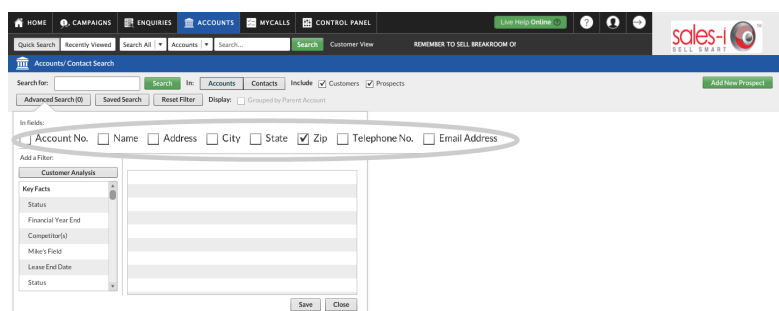
02 Next, click **Advanced Search**.



03 You will now see a list of Search Options.

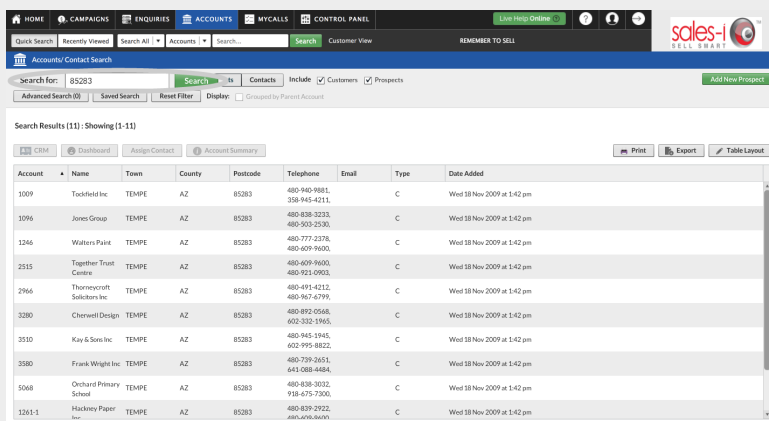
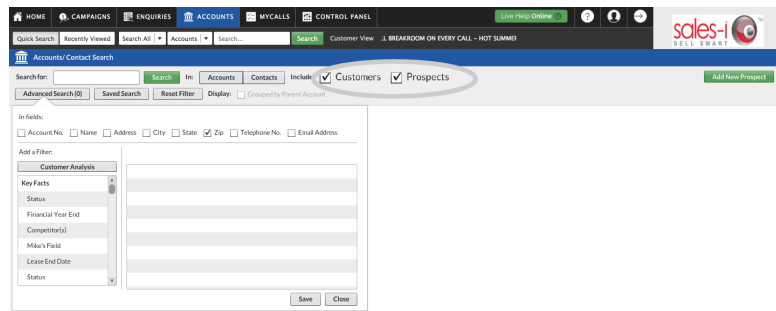
Untick **Name** and **Account Number**.

Tick **Post Code / Zip Code, Town** or **County/State** depending on what you would like to search for.



04 As standard, your results will show you all of your accounts.

If you would like to only see Customers or Prospects, tick or untick **Customers** or **Prospects** as required.



05 Now you need to type in what you would like to search for.

Type in the details of the post code/ zip/town/county etc that you would like to search for and click the green **Search** button.

You will now see a list of all Accounts which match your criteria.

TOP TIP: WILD CARD SEARCH

By default, sales-i will run a full or partial search, however if you want to narrow your search down e.g. to a particular postcode area you can do this by adding an asterisk (*) to the end of your search criteria.