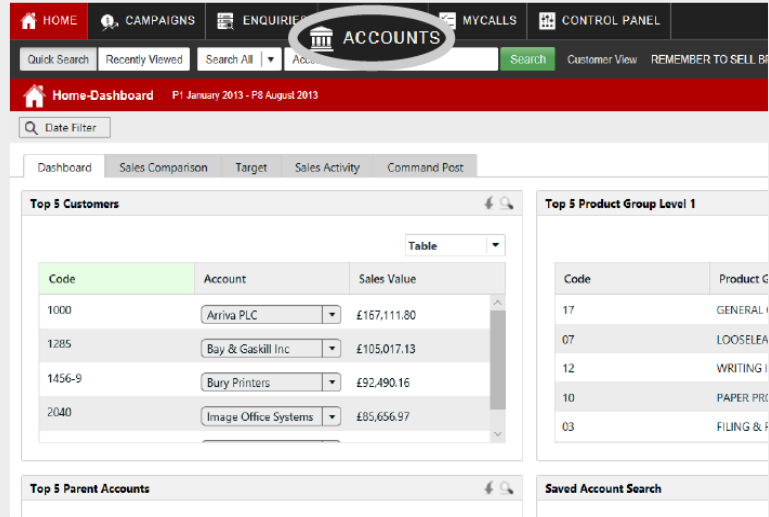


HOW TO CREATE AND SAVE AN ACCOUNT SEARCH - DESKTOP

You can save time by creating and saving Account searches, so that each time you log in to sales-i you can find key accounts that match a certain criteria, without having to do repeat searches.

For instance (and for the purposes of this example) you can search for a particular Sales Rep's accounts and save it.

01 From the home screen, click on the **Accounts** tab.

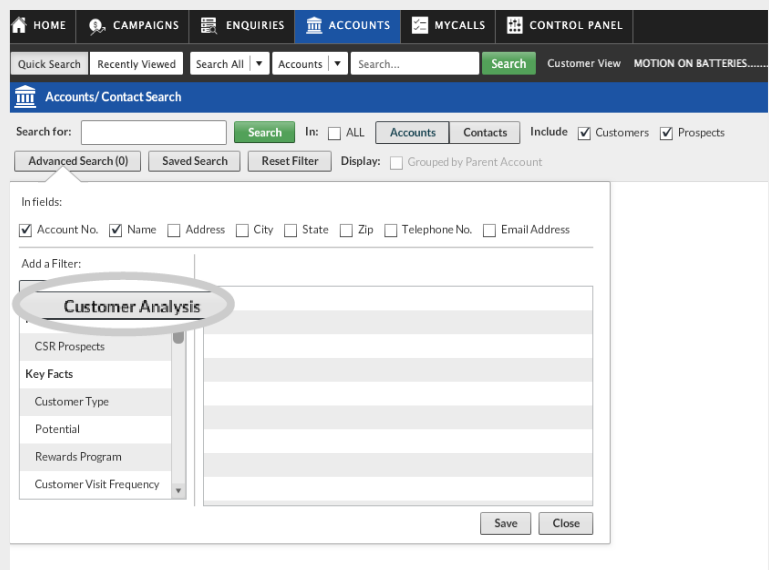


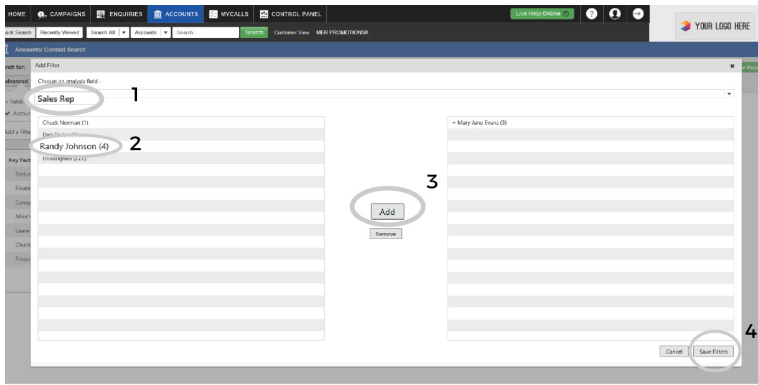
02 If you wanted to list all of the accounts that are visible to you, you can simply click on **Search**.

If you wanted to limit your search to customer accounts or prospects, you can use the check boxes labelled **Ship-To's** and **Prospects** to remove either account type from your search. Please note that **Ship-To's** may be called something different in your cube, for instance, **Customer**.

For this example, we are listing all accounts assigned to a particular Sales Rep, so we will tick **Ships-To's/customers** and **Prospects** and click on **Advanced Search**.

03 You now need to select your analysis type. To do so, tap where it says **Customer Analysis**.





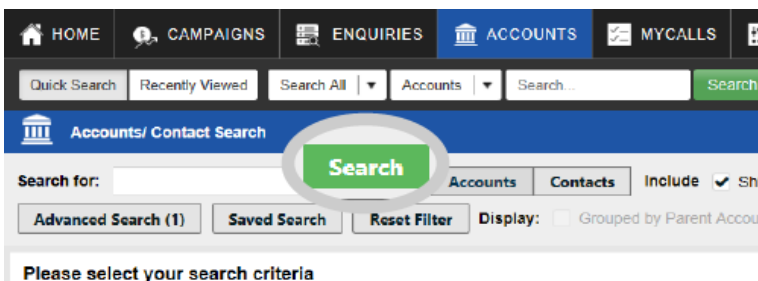
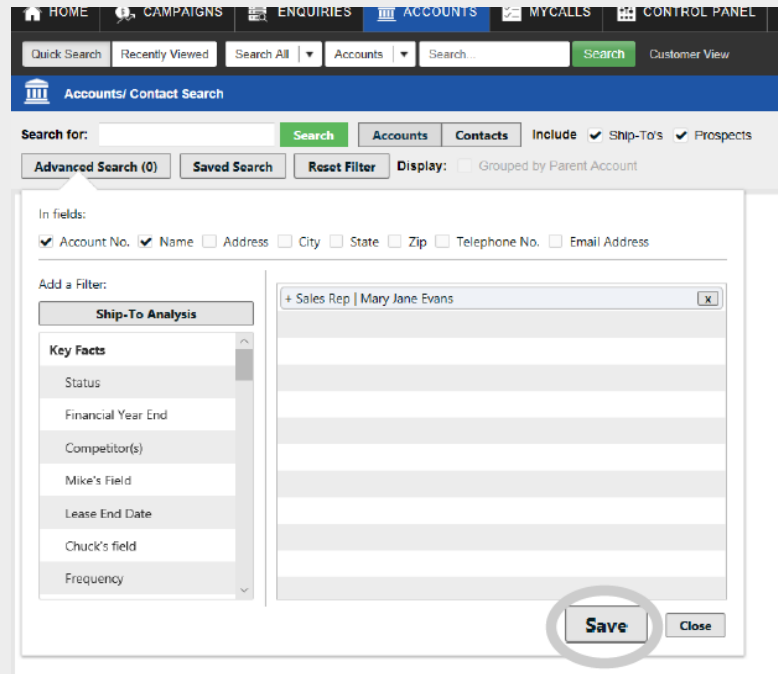
04 At this stage you need to click an analysis field, options you will see here will depend on the customer analysis fields (green bubbles) you have had set up. This could include Branch, Sales Rep, Territory, Parent Account or Customer to name just a few.

For this example, we will click on **Choose an analysis field** and select **Sales Rep**.

Next, click on the Sales Rep who's accounts you would like to view, so they highlight green and click **Add**.

Finally, click **Save Filters**.

05 Next, click **Save**.



06 We are now ready to search, to do so click the green **Search** button.

Search for: [Search] Accounts Contacts Include Ship-To's Prospects

Advanced Search **Saved Search** Filter Display: Grouped by Parent Account

Search Results 147: Showing (1-100)

Account Number	Name	Town	County	Postcode	Telephone	Email	Type
1014	Cactus Plants Inc	CHANDLER	AZ	85225	480-732-0732, 480-215-7400.		C
1028	Autoprint Inc	TEMPE	AZ	85284	480-763-3655, 480-461-4300.		C
1070	Nottingham Wheels	TEMPE	AZ	85284	480-893-7900, 480-503-0267.		C
1171	Wilson & Vernon	FORT MCDOWELL	AZ	85264	480-789-7173, 480-609-9600.		C
1181	Sunline Direct Mail Inc	CHANDLER	AZ	85224	480-403-0020, 480-609-9600.		C
1193	Aston Design Inc	CHANDLER	AZ	85225	480-834-9144, 480-609-9600.		C
1230	Allan Printers Inc	TEMPE	AZ	85281	480-968-5601, 480-609-9600.		C
1232	Barley Sons Inc	GILBERT	AZ	85234	480-962-7510, 480-609-9600.		C
1241	Parkside Paper Manufacturer	Tulsa	OK	74145	663-349-6645, 480-609-9600.		C
1245	Sinclair & Inc	MESA	AZ	85213	480-396-1000.		C

07 You will now see a list of accounts matching your search criteria.

You can save this by clicking on the **Saved Search** button.

08 You now need to enter a name for your saved search. To do so, enter a name in the box that says *Please enter a filter description*.

Please Note: The name should be something that will make sense when you or someone else looks for at a later date. In this example we will enter 'Mary Jane Evans Accounts'

If you want to ensure only you can see and access this search, click **Save Filter**.

If you want to allow others to be able to see and access this saved search click **Save Filter Globally**.

If you want to assign the filter to a specific user, use the drop down list under where it says Assign Saved Filter To User to select the user, then click the **Assign To User** button.

Search for: [Search] Accounts Contacts Include Ship-To's Prospects

Advanced Search (1) **Saved Search** Reset Filter Display: Grouped by Parent Account

Search Results 147: Showing (1-100)

Available Saved Filters:

- All Contacts Search Global
- Branch 4 Accounts Global
- dj-global
- jet press
- Luke test
- On stop
- Prospects
- restriction saved

Create New Filter

How to Create a Saved Account Search

Save Filter Save Filter Globally

Manage Saved Filters

Show account filters created in Campaign Manager

Assign Saved Filter To User

Dave Lyon (dave-lyon-my2)

Assign To User

09 Now that you have saved your search, you can access it easily any time you need to.

Simply, Click **Accounts**, followed by the **Saved Search** button. click on your Saved Search so that it highlights green and then click on **Load Filter**.

Your Saved Search will now be displayed.

Search for: [Search] Accounts Contacts Include Ship-To's Prospects

Advanced Search **Saved Search** Filter Display: Grouped by Parent Account

Search Results 147: Showing (1-100)

Account Number	Name	Town	County	Postcode	Telephone	Email	Type
1014	Cactus Plants Inc	CHANDLER	AZ	85225	480-732-0732, 480-215-7400.		C
1028	Autoprint Inc	TEMPE	AZ	85284	480-763-3655, 480-461-4300.		C
1070	Nottingham Wheels	TEMPE	AZ	85284	480-893-7900, 480-503-0267.		C
1171	Wilson & Vernon	FORT MCDOWELL	AZ	85264	480-789-7173, 480-609-9600.		C
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