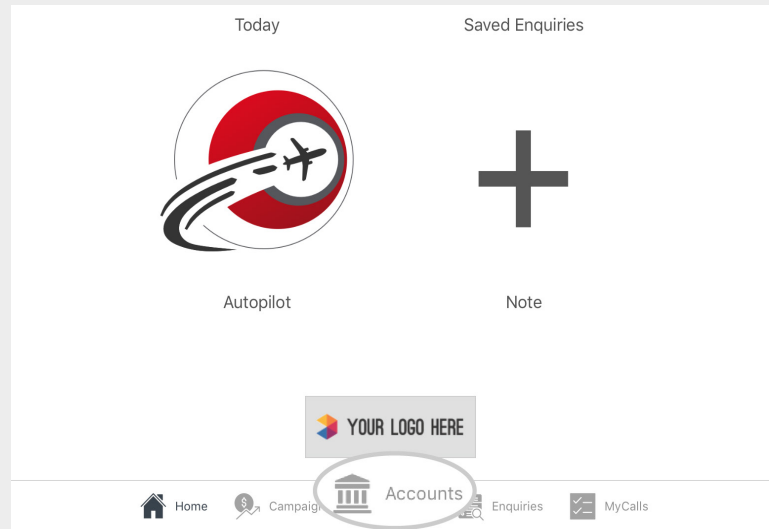


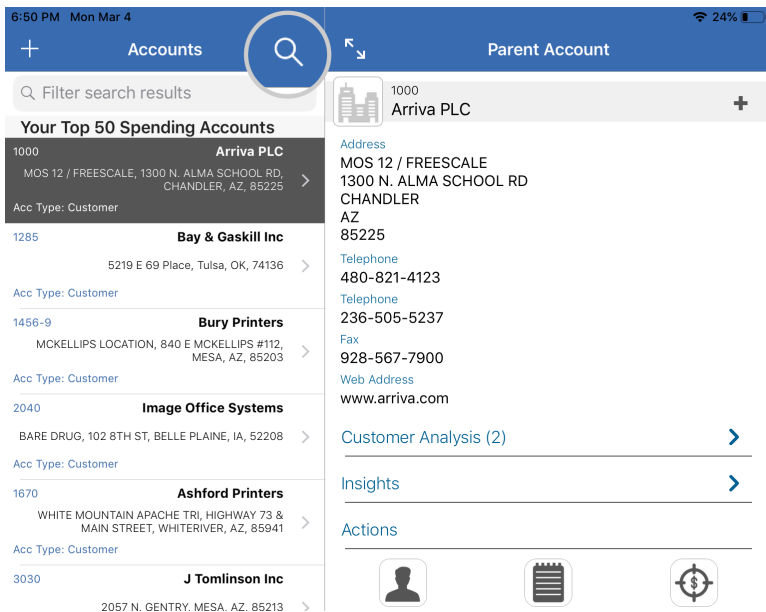
# HOW TO CREATE AND SAVE AN ACCOUNT SEARCH - APPLE

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.

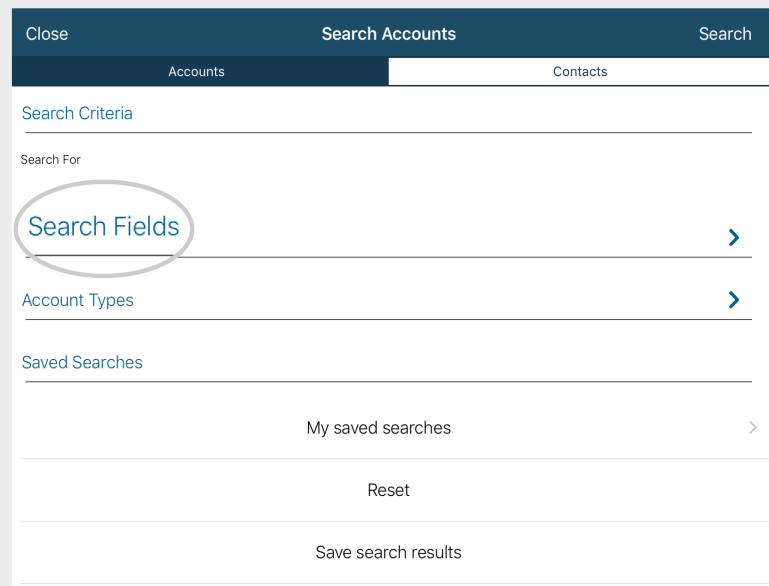
**01** From the home screen, click on the **Accounts** tab.



**02** Tap on the Magnifying Glass icon.



**03** Tap **Search Fields** to open up a list of search options.



Close Search Accounts Search

Accounts Contacts

Search Criteria

Search For **Mary**

Name ✓

Account number ✓

Address ✓

Town ✓

State/County ✓

ZIP/Postcode ✓

Telephone ✓

Email ✓

Sales rep ✓

**04** For our example we will check the **Sales Rep box**, then search for our Sales Rep by typing their name in underneath the **Search For** field.

Once you are ready, tap **Search** in the top right of the window.

**05** You will now see your results. To save your results tap the **magnifying icon**.

Accounts Accounts Parent Account

Filter search results

**(147) Search results for 'Mary'**

1014	<b>Cactus Plants Inc</b> 1727 N. ARIZONA AVE., CHANDLER, AZ, 85225 Acc Type: Customer	Address MOS 12 / FREESCALE 1300 N. ALMA SCHOOL RD CHANDLER AZ 85225
1028	<b>Autoprint Inc</b> 8930 S BECK AVE, #109, TEMPE, AZ, 85284 Acc Type: Customer	Telephone 480-821-4123 Telephone 236-505-5237 Fax 928-567-7900 Web Address www.arriva.com
1070	<b>Nottingham Wheels</b> 8030 S. AUTOPLEX LOOP, TEMPE, AZ, 85284 Acc Type: Customer	Customer Analysis (2)
1171	<b>Wilson &amp; Vernon</b> PUBLIC SAFETY BUILDING, 10755 N. FORT MCDOWELL RD, SUITE #4, FORT MCDOWELL, AZ, Acc Type: Customer	Insights
1181	<b>Sunline Direct Mail Inc</b> 460 S. BENSON LANE, SUITE 12, CHANDLER, AZ, 85224 Acc Type: Customer	Actions
1193	<b>Aston Design Inc</b> 330 E. COMSTOCK DRIVE, CHANDLER, AZ, 85225 Acc Type: Customer	Contacts
1230	<b>Allan Printers Inc</b> 1019 S. PARKSIDE DRIVE, TEMPE, AZ, 85281 Acc Type: Customer	Call History Notes
1232	<b>Barley Sons Inc</b> 4001 E BASELINE STE 205, GILBERT, AZ, 85234 Acc Type: Customer	Opportunities

Enquiries

Generate Snapshot

Campaigns

Speed Mix

Targets

Document Storage

**06** Next, click **Save search results**.

Close Search Accounts Search

Accounts Contacts

Search Criteria

Search For **Mary**

Search Fields >

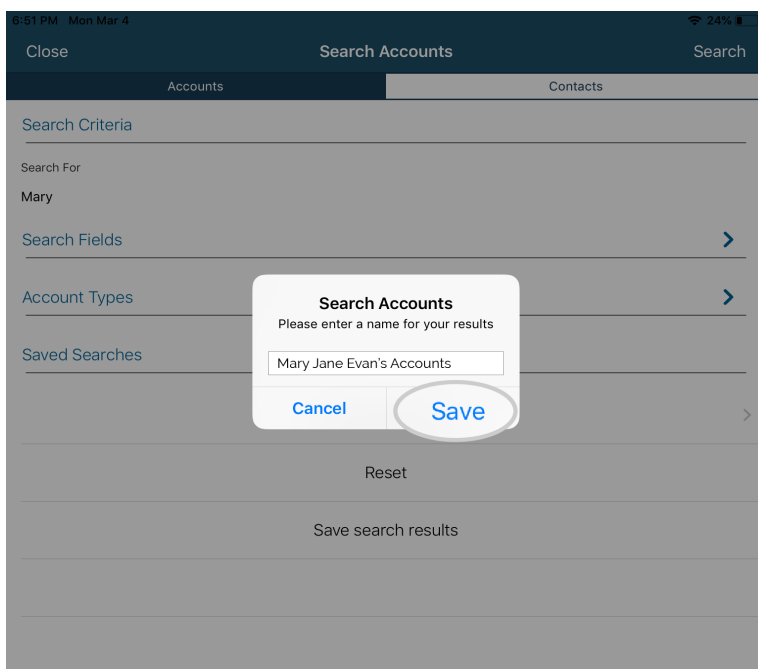
Account Types >

Saved Searches

My saved searches >

Reset

**Save search results**



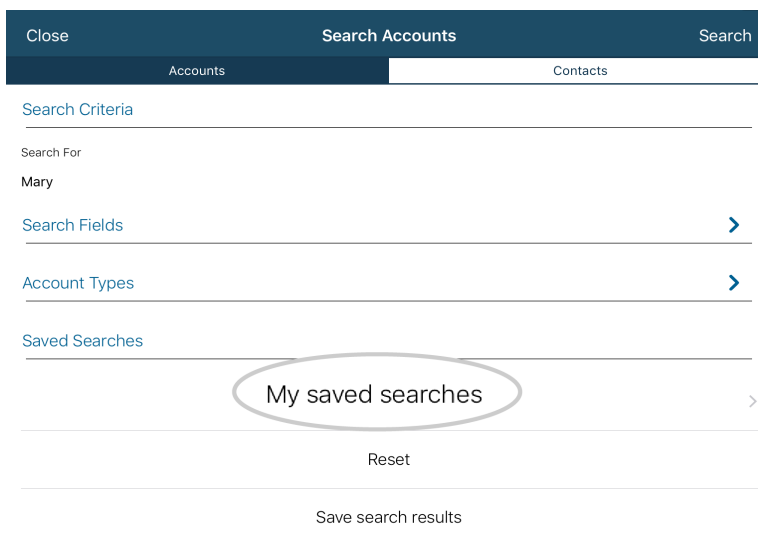
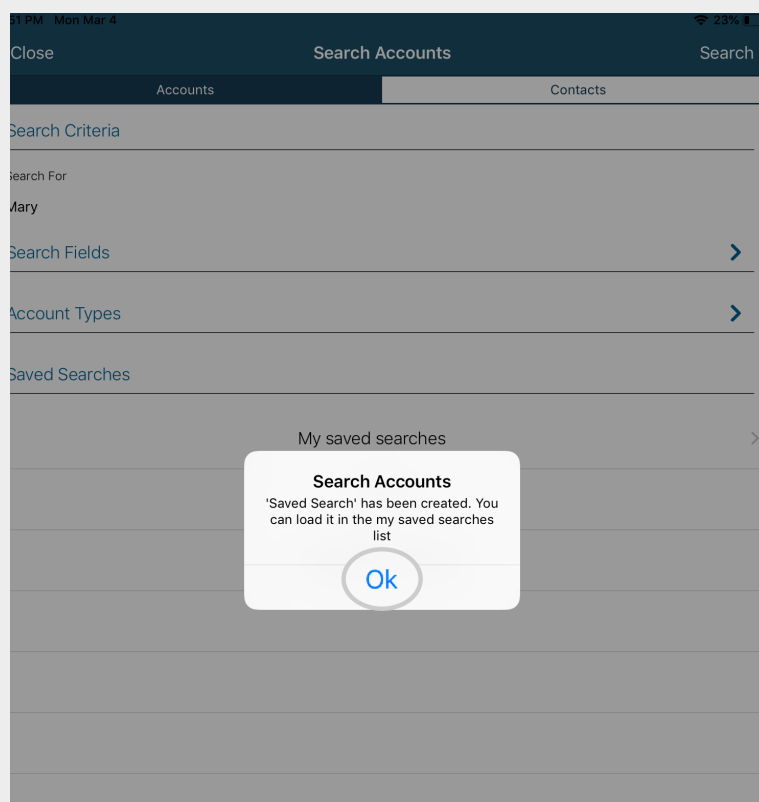
**07** You now need to enter a name for your saved search. To do so, enter a name in the box that says *Please enter a name for your results*.

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 Evan's Accounts'

Next, click **Save**.

**08** A box will now pop up to let you know your search has been created.

Tap **OK**.



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

Simply, Click **Accounts**, followed by the **magnifying icon** and finally click **My saved searches**.

Select your Saved Search to display it.