

## 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.



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.

n HOME 🧕, CAMPAIGNS 🧱 ENQUIRIES 🧮 ACCOUNTS 🔄 MYCALLS 🔛 CONTROL PANEL	
Cuick Search Recently Viewed Search All V Accounts V Search Search Customer View REMEMBER TO SELL BREAKAD	
m Accounts/ Contact Search	
Search for: Search In: Accounts Contacts Include 🗹 Customers 🗹 Prospects	Add New Prospect
Advanced Search (0) Saved Search Reset Filter Display: Grouped by Parent Account	
In fields:	
Account No. Name Address City State Zip Telephone No. Email Address	>
Add a Fiber:	
Customer Analysis	
Key Facts	
Status	
Financial Year End	
Competitor(s)	
Miles Field	
Lease End Date	
Status v	
Saue Close	



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.

HOME 🔍, CAMPAIGNS		MYCALLS E CONTROL PANEL	Live Help Online (9)	
Quick Search Recently Viewed	Search All        Accounts        Search	Search Customer View	LL BREAKROOM ON EVERY CALL - HOT SUMMER	
Accounts/ Contact Search				
earch for:	Search In: Accounts	Contacts Include 🗹 Customer	rs 🗹 Prospects	Add New Prospect
Advanced Search (0) Saved	Search Reset Filter Display:	Grouped by Parent Account		
In fields:				
Account No. Name Ac	ddress 🗌 City 📄 State 🗹 Zip 📄	Telephone No. 🗌 Email Address		
Add a Filter:				
Customer Analysis				
Key Facts				
Status				
Financial Year End				
Competitor(s)				
Mike's Field				
Lease End Date				
Status				
		Save Close		

номе	Q, CAMPAIGNS	ENQUIRIES		MYCALI	LS CONT	ROL PANEL		Live Help Online 🕥	000	
Quick Search	Recently Viewed	Search All 🛛	Accounts    Sean	h	Search C			REMEMBER TO SELL		SELL SHART
â Accoun	ts/ Contact Search									
Search for	85283		Search -	s Contacts	Include 🗹 Cu	istomers 🗹 Pr	ospects			Add New Prospect
Advanced 5	earch (0) Saved	search Kes	et Hiter Display:							
Search Resu	Its (11) : Showing (	1-11)								
CRM	Dashboard	Assign Contac	t 🚺 Account	Summary					m Print	Table Layout
Account	Name	Town	County	Postcode	Telephone	Email	Туре	Date Added		
1009	Tockfield Inc	TEMPE	AZ	85283	480-940-9881, 358-945-4211,		с	Wed 18 Nov 2009 at 1:42 pm		
1096	Jones Group	TEMPE	AZ	85283	480-838-3233, 480-503-2530,		с	Wed 18 Nov 2009 at 1:42 pm		
1246	Walters Paint	TEMPE	AZ	85283	480-777-2378, 480-609-9600,		с	Wed 18 Nov 2009 at 1:42 pm		
2515	Together Trust Centre	TEMPE	AZ	85283	480-609-9600, 480-921-0903,		с	Wed 18 Nov 2009 at 1:42 pm		
2966	Thorneycroft Solicitors Inc	TEMPE	AZ	85283	480-491-4212, 480-967-6799,		с	Wed 18 Nov 2009 at 1:42 pm		
3280	Cherwell Design	TEMPE	AZ	85283	480-892-0568, 602-332-1965,		с	Wed 18 Nov 2009 at 1:42 pm		
3510	Kay & Sons Inc	TEMPE	AZ	85283	480-945-1945, 602-995-8822,		с	Wed 18 Nov 2009 at 1:42 pm		
3580	Frank Wright Inc	TEMPE	AZ	85283	480-739-2651, 641-068-4484,		с	Wed 18 Nov 2009 at 1:42 pm		
5068	Orchard Primary School	TEMPE	AZ	85283	480-838-3032, 918-675-7300,		с	Wed 18 Nov 2009 at 1:42 pm		
1261-1	Hackney Paper	TEMPE	AZ	85283	480-839-2922,		с	Wed 18 Nov 2009 at 1:42 pm		

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.