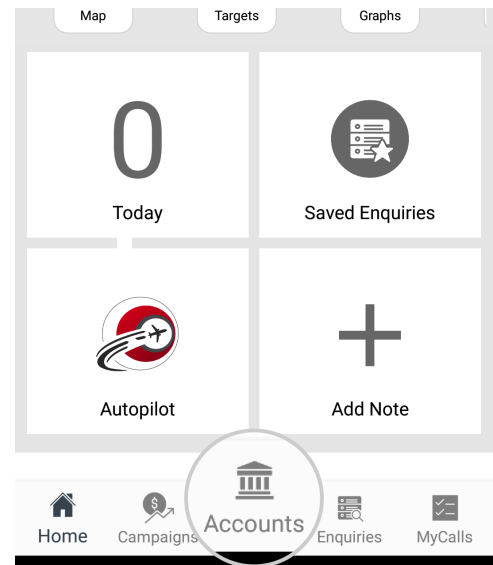


HOW TO SEARCH FOR ALL OF YOUR ACCOUNTS IN A CERTAIN AREA - ANDROID

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 navigation bar at the bottom of the screen, tap **Accounts**



Arriva PLC	1000
MOS 12 / FREESCALE, 1300 N. ALMA SCHOOL RD, CHANDLER, AZ, 85225	
Bay & Gaskill Inc	1285
5219 E 69 Place, Tulsa, OK, 74136	
Bury Printers	1456-9
MCKELLIPS LOCATION, 840 E MCKELLIPS #112, MESA, AZ, 85203	
Image Office Systems	
BARE DRUG, 102 8TH ST, BELLE PLA	
Ashford Printers	870

02 Next, tap the circular **menu button** in the bottom right hand corner of the screen and tap the **Search icon** that appears.

03 You will now see a list of Search Options. Tap **Search Fields** to open up some further options.

Next, tap on **Name** and **Account Number** to untick them.

Finally, tick **Post Code (Zip Code)**, **Town** or **County (state)** depending on what you would like to search for.

ENTER A SEARCH CRITERIA OR LEAVE BLANK

Search Fields ¹

Name 2

Account Number

Address

Town

County

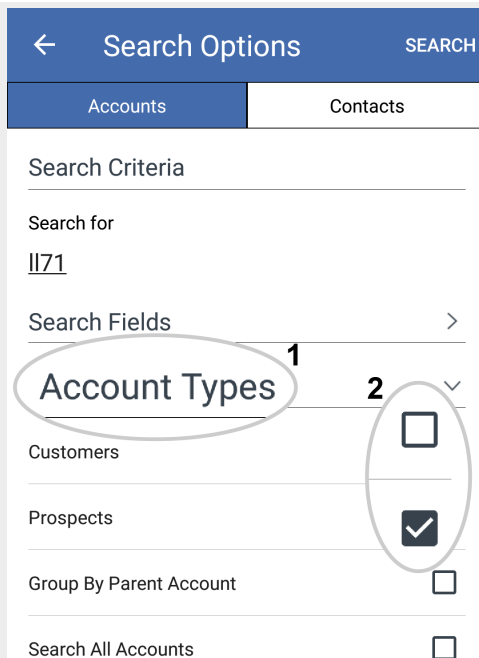
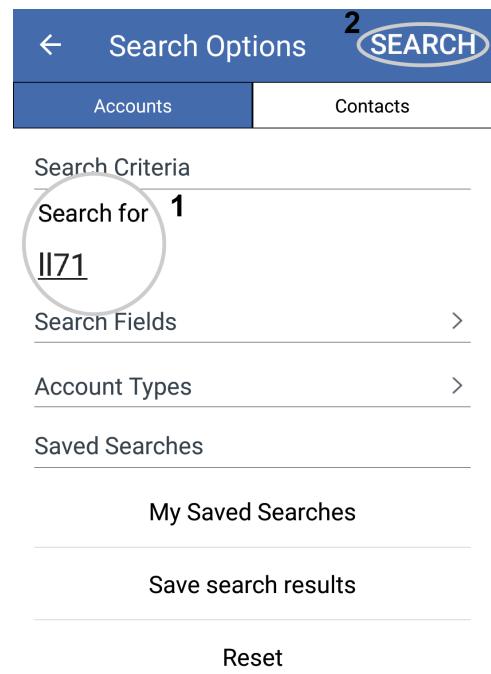
Post Code 3

Telephone No

04 By default the results would show you all of your accounts.

If you would like to see only Customers or only Prospects then scroll down and tap on **Account Types**.

Now, tick or untick **Customers** or **Prospects** as required.



05 Now you need to type in what you would like to search for, so scroll back up and tap on **Search For**.

Enter the details of the postcode/town or State/county etc that you would like to search for and tap **Search** in the top right hand corner of your screen.

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.