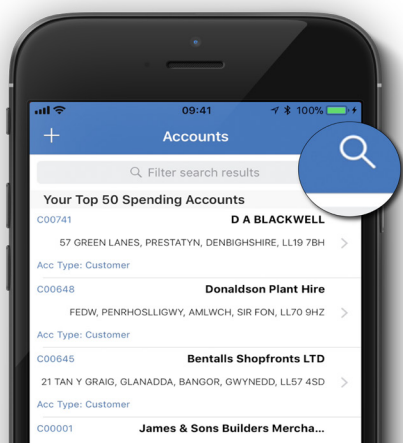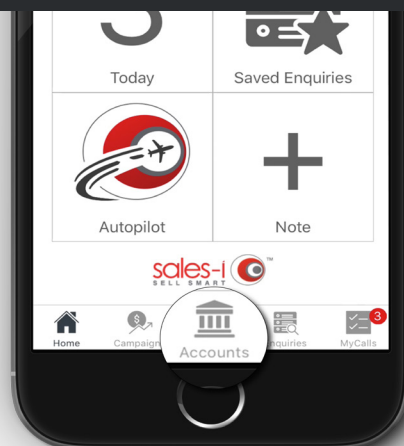# HOW TO SAVE A SEARCH ON YOUR APPLE iOS DEVICE

This guide will show you how to save your often used searches in sales-i, saving you valuable time carrying out admin, giving you more time to sell!

01 Tap **Accounts** from the menu at the bottom of the screen.

02 Accounts in the sales-i app will default to show you a list of your Top 50 Spending Accounts. To start a new search tap the **magnifying glass icon** in the top right corner of the screen.

Note: **Filter search results** allows you to filter the results list of a search - this does not conduct a new search.

03 This will bring you to the Accounts Search screen. You can use **Search Fields** and **Account Types** to specify your search criteria.
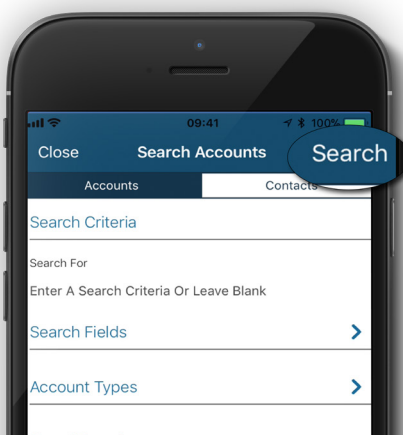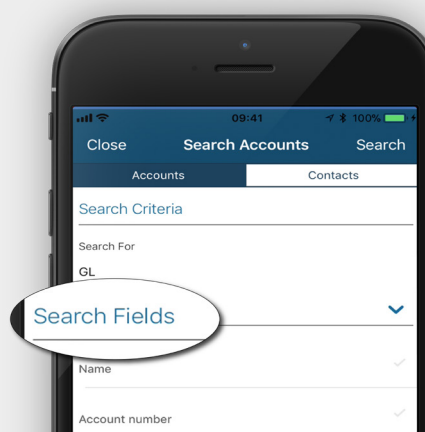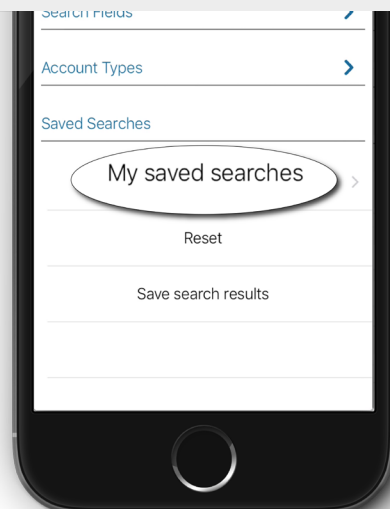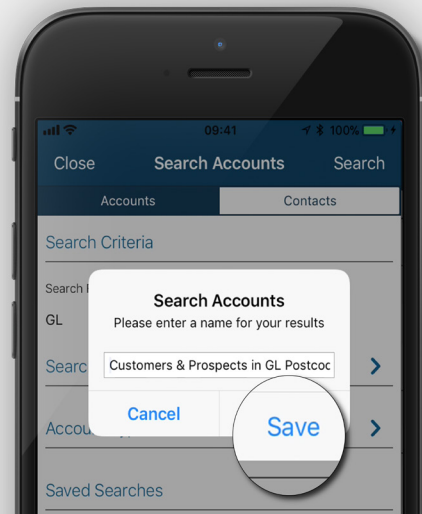
04 When you're happy with the search criteria, tap **Search** to view the results.

05 To save this search tap the **magnifying glass icon** in the top right corner of the screen.
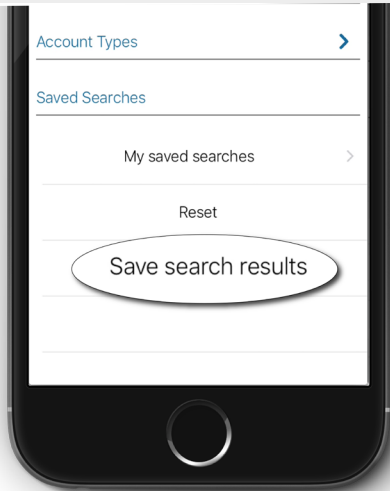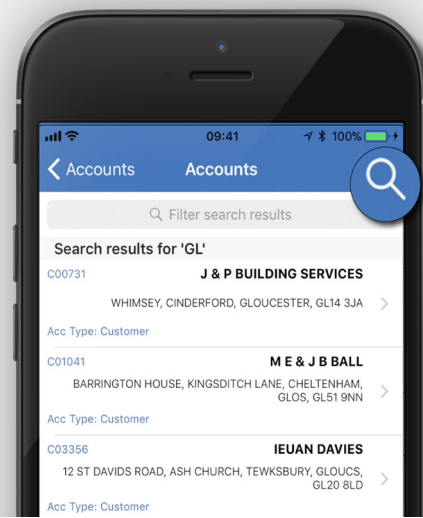
06 You will now see the option to **Save Search Results** at the bottom of the Accounts Search screen.

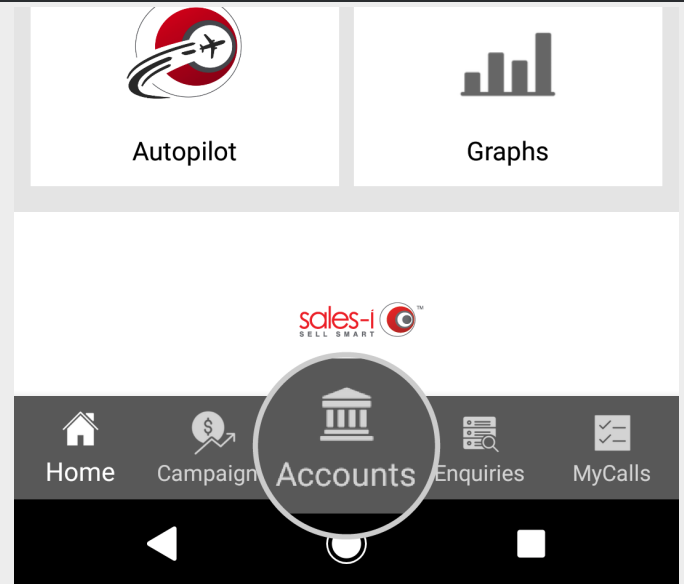**07** Enter a name for your search in the pop-up window and tap **Save**.

08 Your search is now saved. You can access this search by tapping **My Saved Search** at the bottom of the Accounts Search screen*.

*Please note: Every time you access this saved search your search results will be automatically updated with any new accounts that match your search criteria.
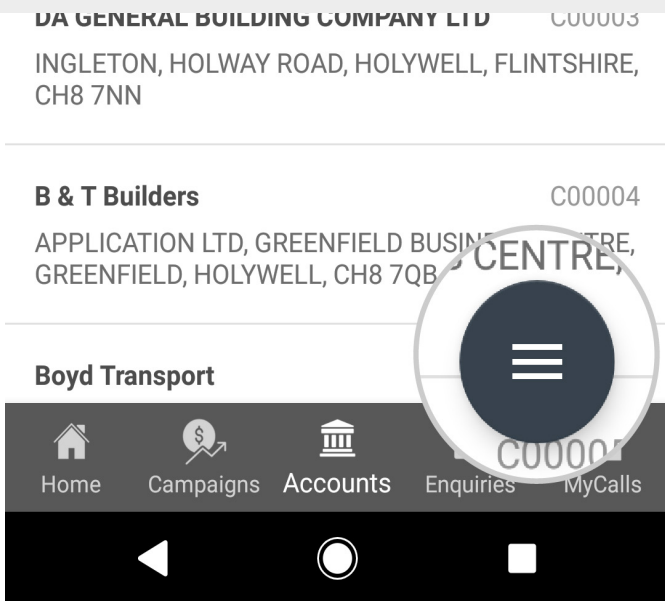
HOW TO SAVE A SEARCH
ON YOUR ANDROID DEVICE

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saving you valuable time carrying out admin, giving you more time to sell!

01 Tap **Accounts** from the menu at the bottom of the screen.

DA GENERAL BUILDING COMPANY LTD C00003

INGLETON, HOLWAY ROAD, HOLYWELL, FLINTSHIRE, CH8 7NN

B & T Builders C00004

APPLICATION LTD, GREENFIELD BUSINESS CENTRE, GREENFIELD, HOLYWELL, CH8 7QB

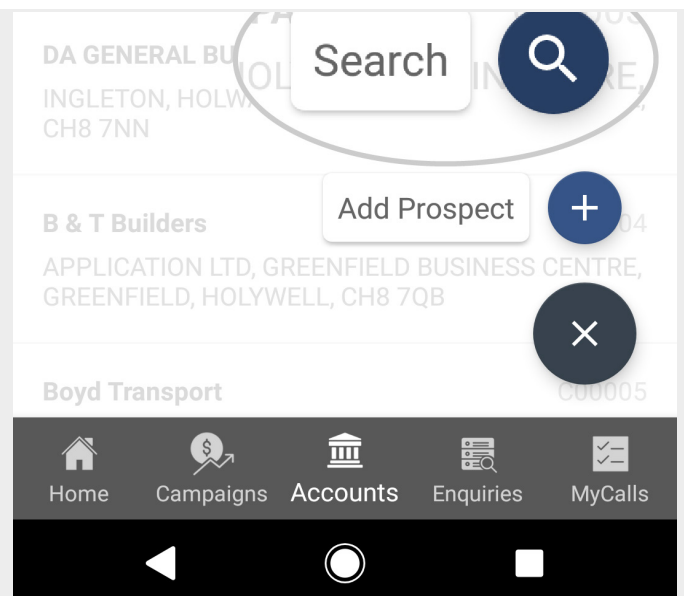**Boyd Transport**

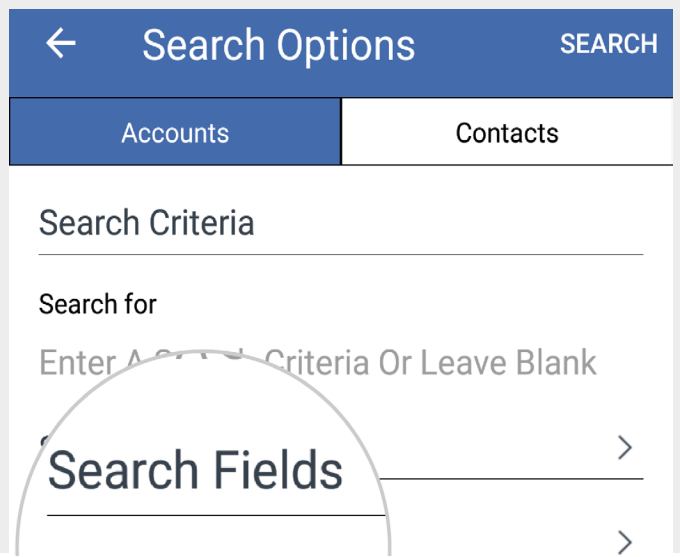**02** Tap the three lines icon to open up further options.

03 Accounts in the sales-i app will default to show you a list of your Top 50 Spending Accounts. To start a new search tap the **magnifying glass icon** in the top right corner of the screen.

Note: **Filter search results** allows you to filter the results list of a search - this does not conduct a new search.

04 This will bring you to the Accounts Search screen. You can use Search Fields and Account Types to specify your search criteria.

Search Criteria

Search for

Enter A Search Criteria Or Leave Blank

Search Fields   ⟩

                                 ⟩

05 When you're happy with the search criteria, tap **Search** to view the results.

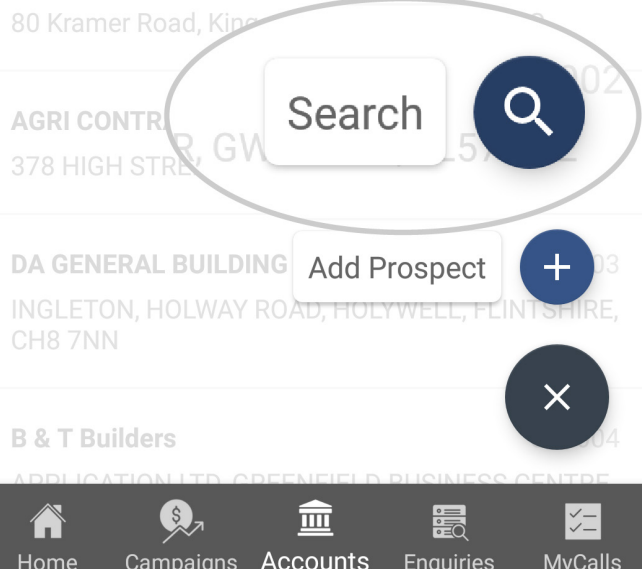← Search Options   SEARCH

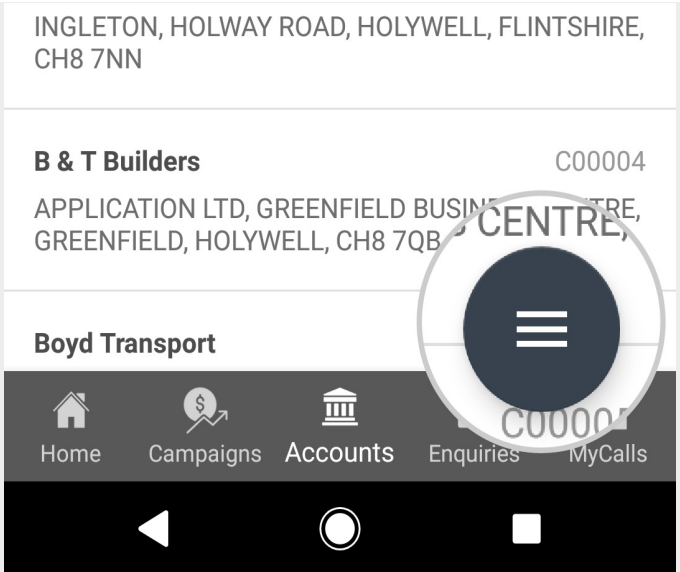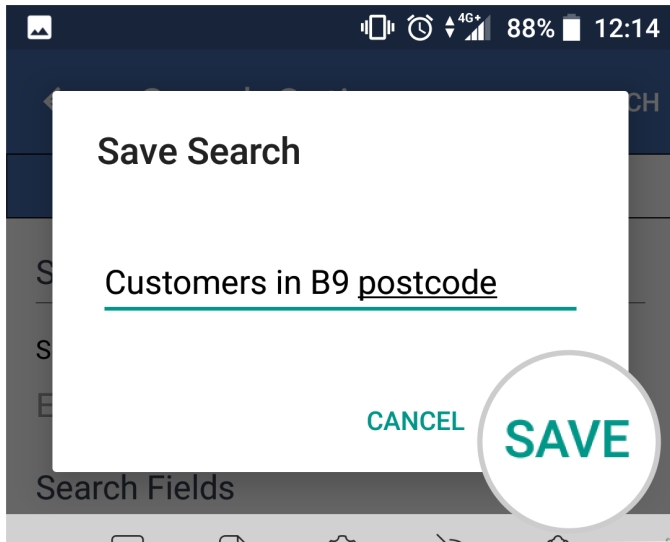Accounts   Contacts
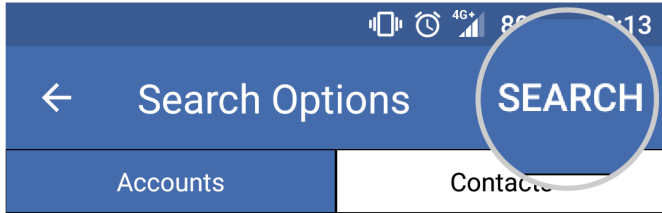
Search Criteria

Search for

Enter A Search Criteria Or Leave Blank

Search Fields   ⟩

06 To save this search, tap the three lines icon to open up further options

INGLETON, HOLWAY ROAD, HOLYWELL, FLINTSHIRE, CH8 7NN

B & T Builders   C00004

APPLICATION LTD, GREENFIELD BUSINESS CENTRE, GREENFIELD, HOLYWELL, CH8 7QB

Boyd Transport   C0000

☰

Home   Campaigns   Accounts   Enquiries   MyCalls

07 Tap the magnifying glass icon.

80 Kramer Road, King...   02

AGRI CONTR...R, GW...5...

378 HIGH STRE...

Search 🔍

DA GENERAL BUILDING...   03

INGLETON, HOLWAY ROAD, HOLYWELL, FLINTSHIRE, CH8 7NN

Add Prospect ➕

✕

B & T Builders   04

APPLICATION LTD, GREENFIELD BUSINESS CENTRE

Home   Campaigns   Accounts   Enquiries   MyCalls

08 You will now see the option to **Save Search Results** at the bottom of the Accounts Search screen.

My Saved Searches

Save search results

Reset

09 Enter a name for your search in the pop-up window and tap **Save**.

Save Search

Customers in B9 postcode
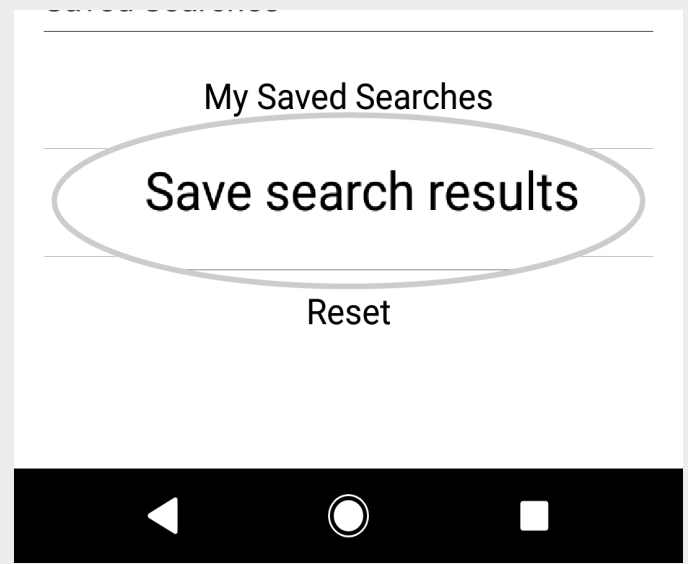
CANCEL   SAVE

10 Your search is now saved. You can access this search by tapping **My Saved Search** at the bottom of the Accounts Search screen*.

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Saved Searches

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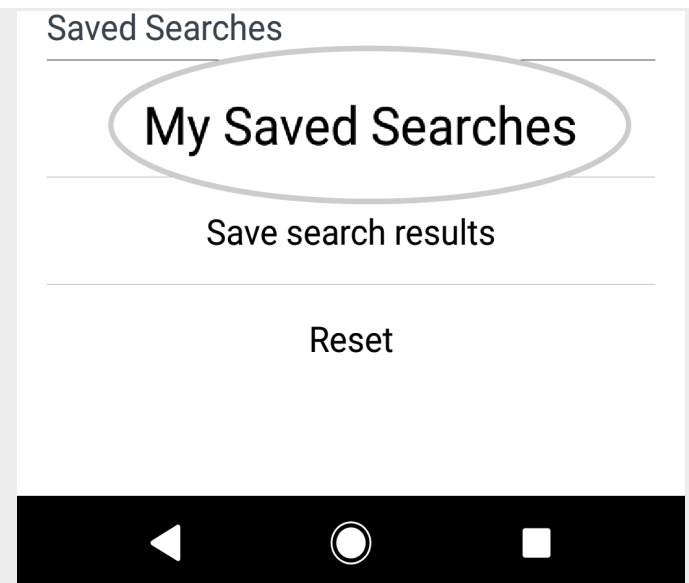
VISIT OUR SUPPORT SITE

Don't forget to visit our support site online to view sales-i how to's, tips, tricks and best practices.
https://support.sales-i.com