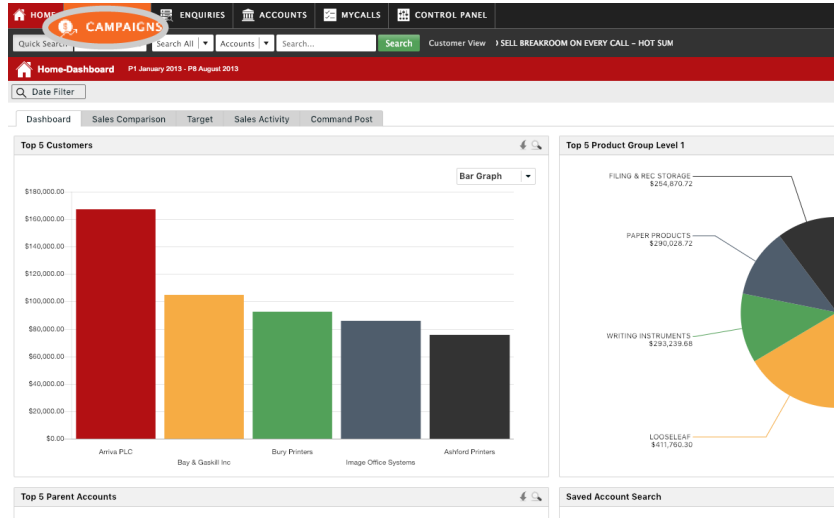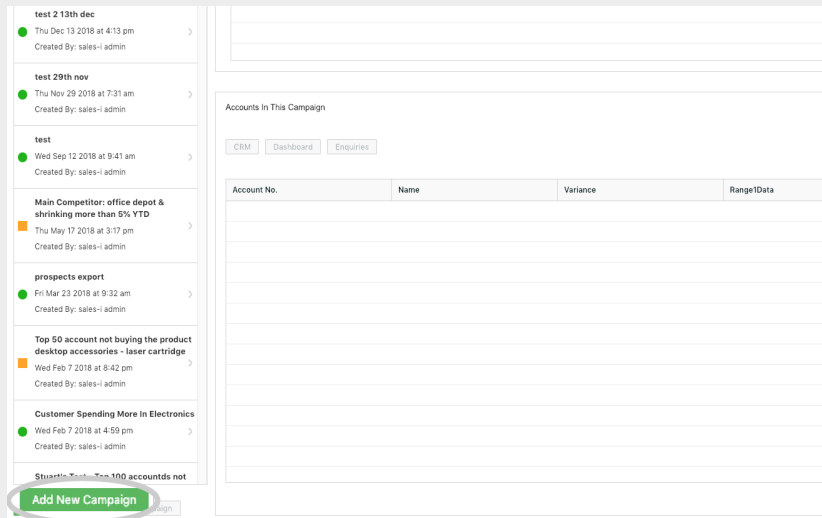# HOW TO...
SEE ALL OF YOUR CUSTOMERS ON A MAP

You can use the Campaigns feature in sales-i to locate your prospects on a map, powered by Google Maps.
This can be beneficial when planning visits to see if there are any other customers near to your planned visit.
Please Note: Only Power Users can create Campaigns, but they can be set up to be viewable by other users as well.
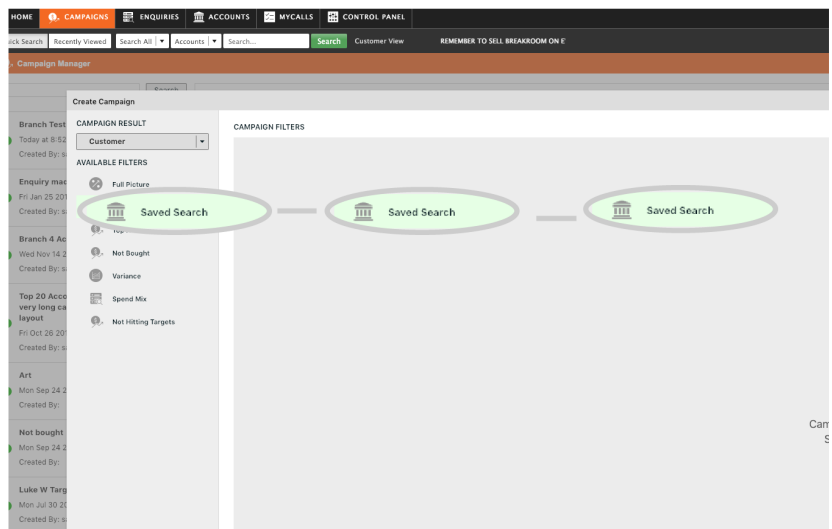
01 Click **Campaigns** from the menu at the top of the screen.
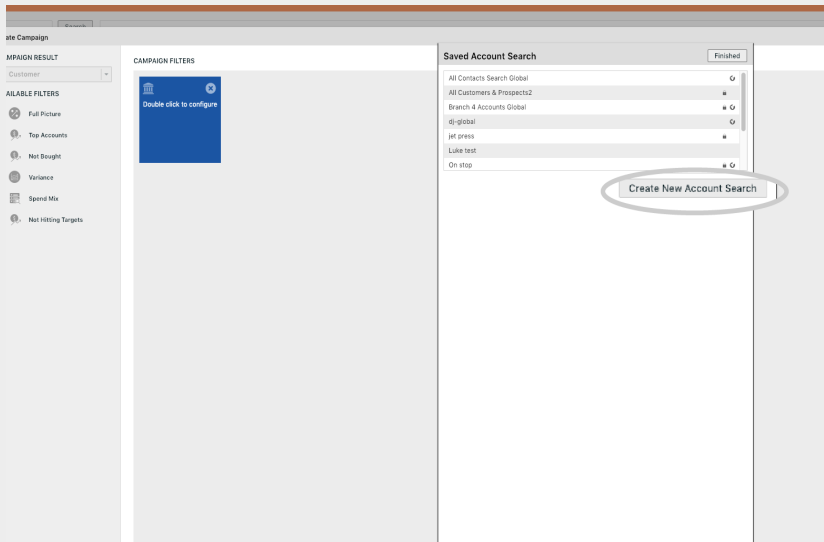

02 Click the green **Add New Campaign** button, in the bottom left of the screen

03 Select **Saved Search** from the Available Filters list. Click and drag it into the center of the window.
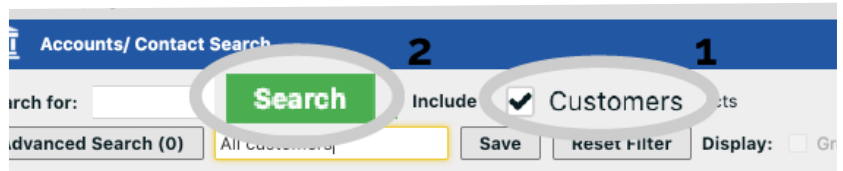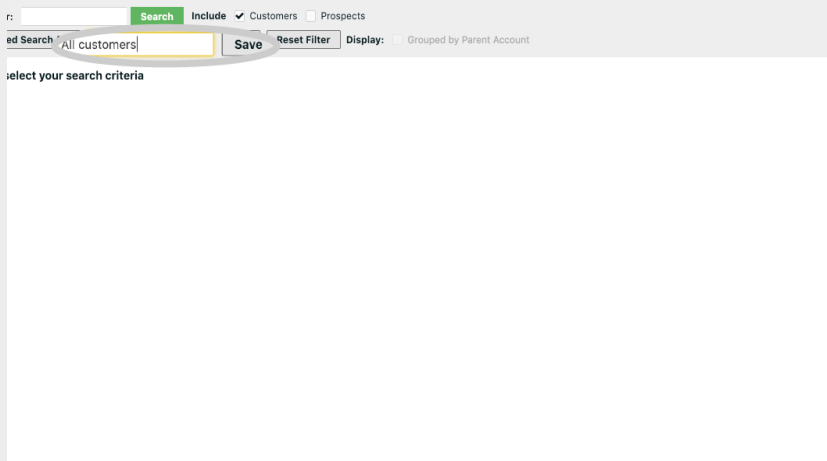
04 Click on **Create New Account Search**.

05 Check the **Customers** box and leave the **Search for:** box empty.

Click the green **Search** button.
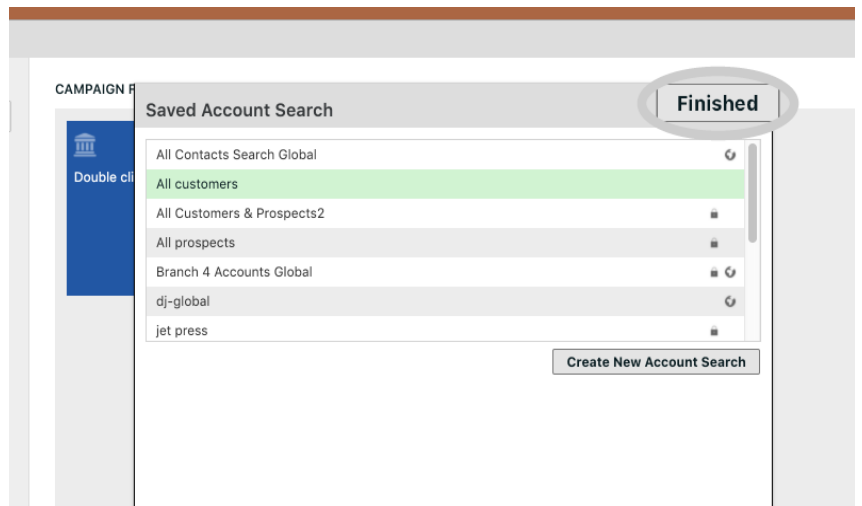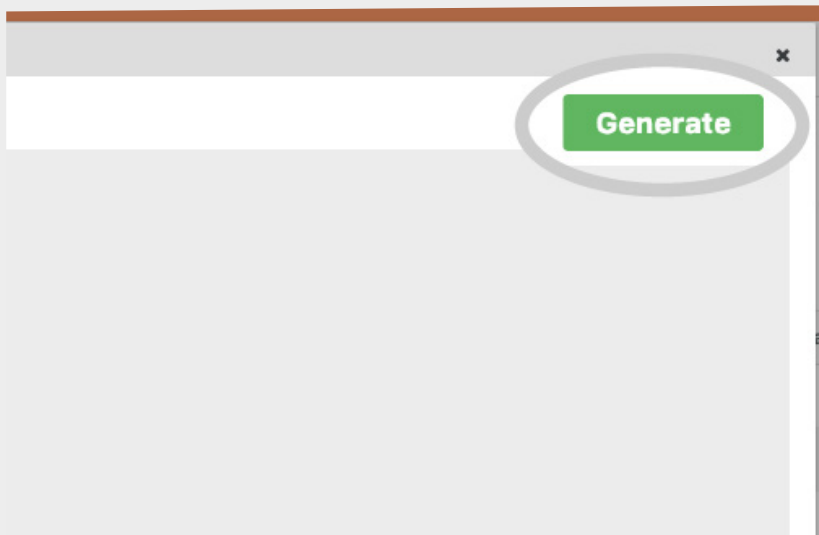
sales-i will now list all of your customers.

06 Enter a name for your list of customers in the box that says "**Name of your saved enquiry**". Then click the **Save** button directly to the right of that box.
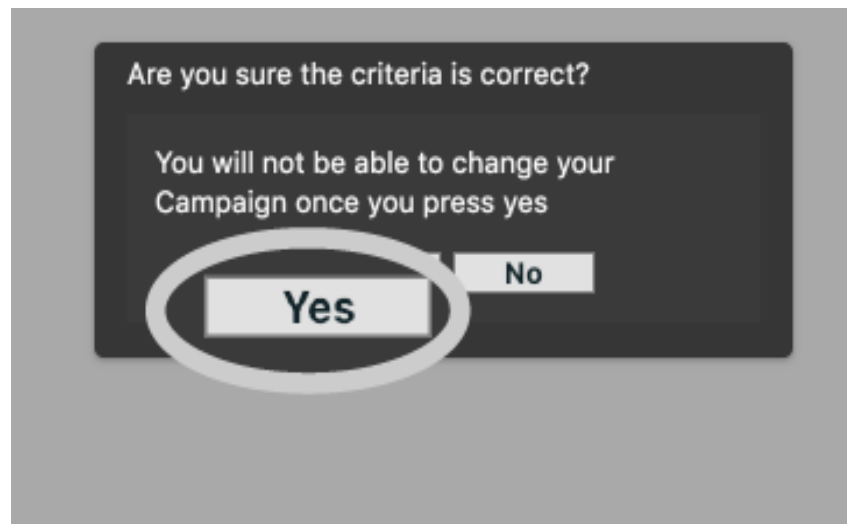
07 Find the search that you created in the list. Click on it so that it is highlighted in green, then click the **Finished** button in the top left of the window.

CAMPAIGN F

Saved Account Search   **Finished**

Double cli

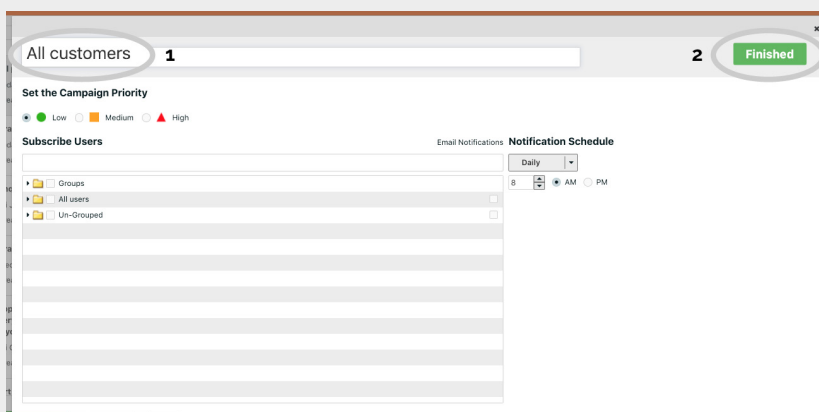| All Contacts Search Global | |
All customers	
All Customers & Prospects2	
All prospects	
Branch 4 Accounts Global	
dj-global	
jet press	

Create New Account Search

Generate

08 Click the green **Generate** button in the top left of the window to create the campaign.

09 sales-i will then ask you if you are sure the criteria is correct, click **Yes**.

Are you sure the criteria is correct?

You will not be able to change your Campaign once you press yes

Yes   **No**

All customers   1   2   **Finished**

Set the Campaign Priority

● Low ○ Medium ▲ High

Subscribe Users   Email Notifications **Notification Schedule**

Daily

▸ ▢ Groups   8   ● AM ○ PM
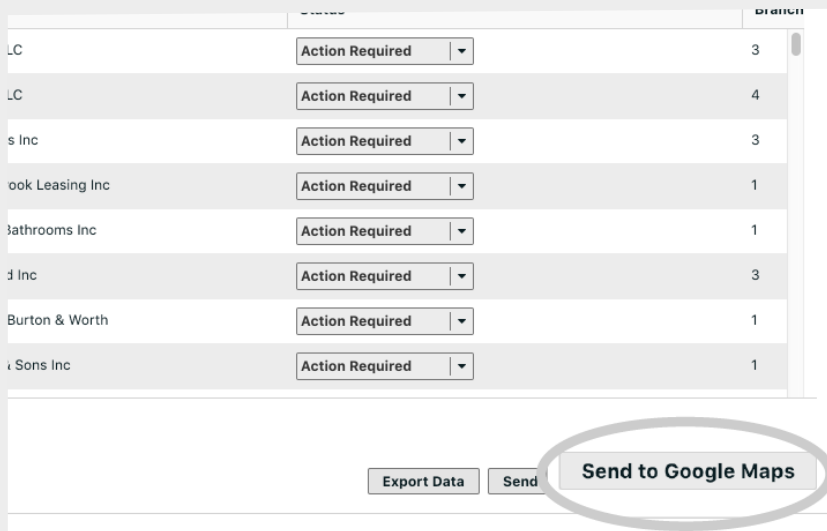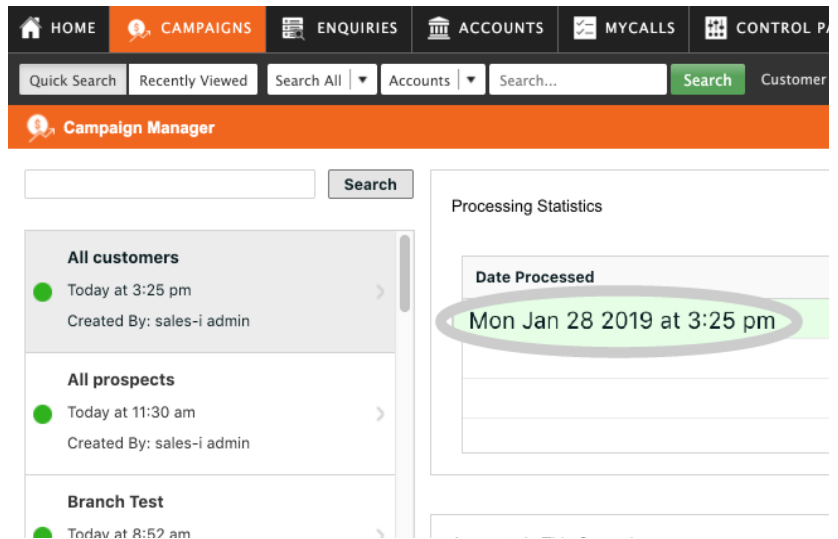▸ ▢ All users
▸ ▢ Un-Grouped

Delete Campaign

10 Enter a name for the campaign in the bar across the top of the window.

Next, select the green **Finished** button in the upper right corner of the current window.

11 Select your new campaign from the list on the left and then select the most recent process under **Date Processed**.

12 Select **Send to Google Maps** in the bottom right of the window.

This will generate the map with all accounts from the campaign plotted on it.

13 It may take a minute or two for the locations to be plotted on the map, but all locations will appear automatically.