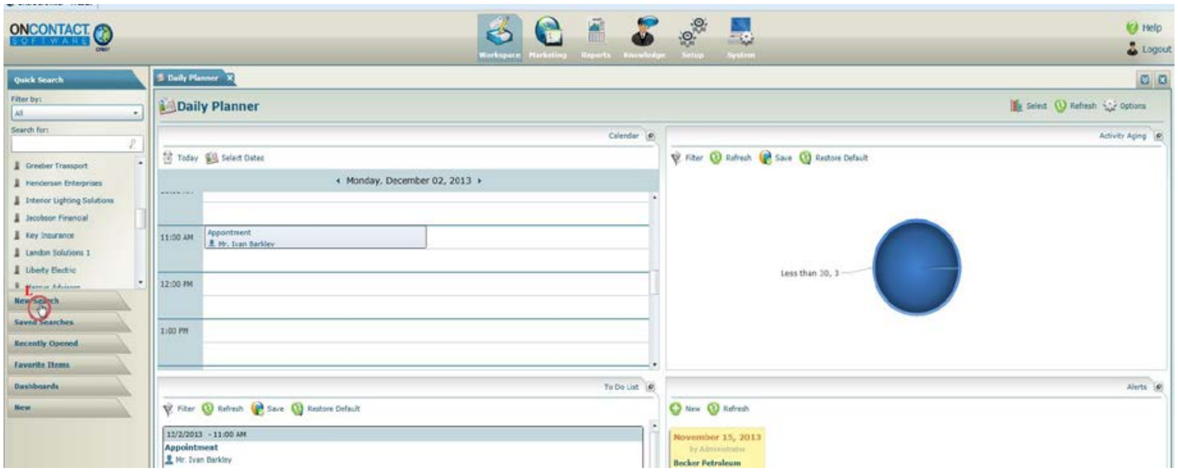
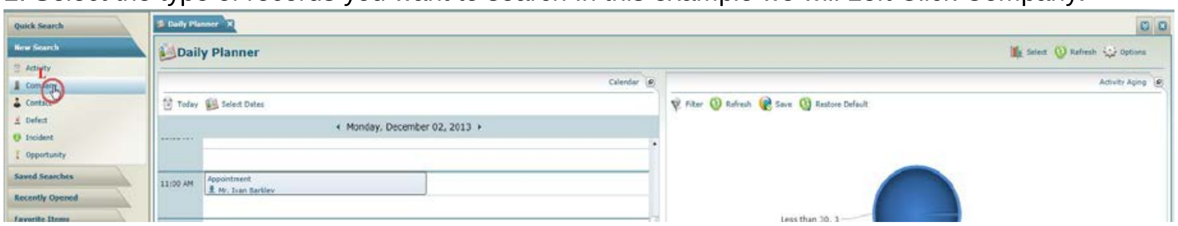
Using New Search

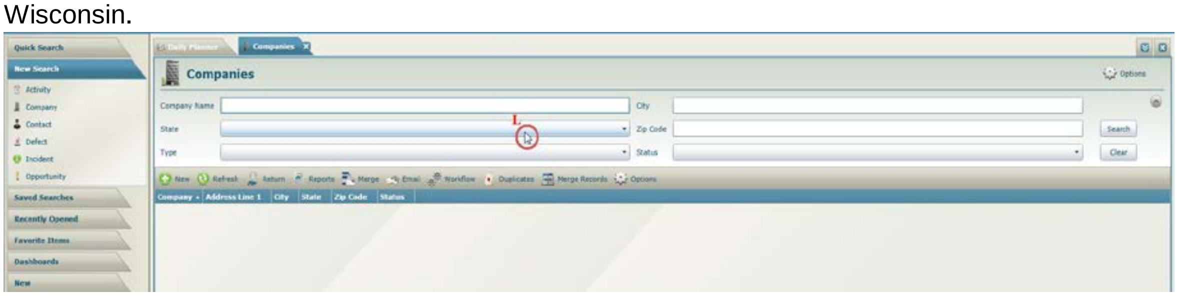
1. Left Click New Search.



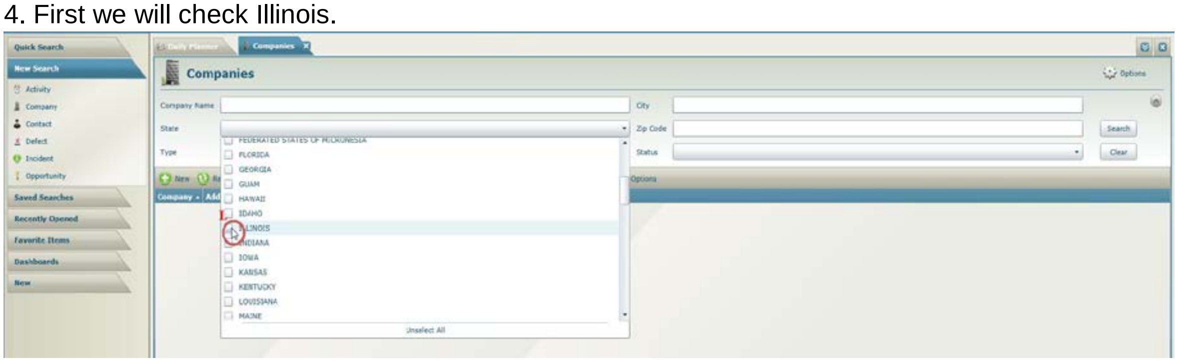
2. Select the type of records you want to search In this example we will Left Click Company.



3. Enter your search criteria. In this example we will search for all companies in Illinois and Wisconsin.

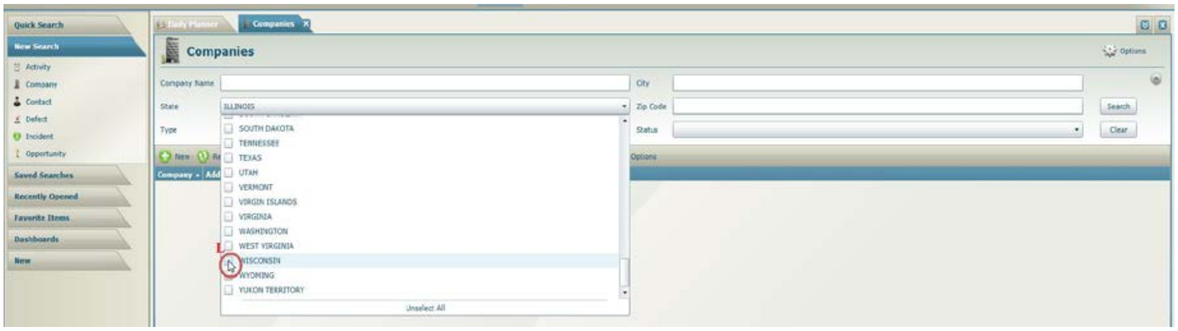


4. First we will check Illinois.

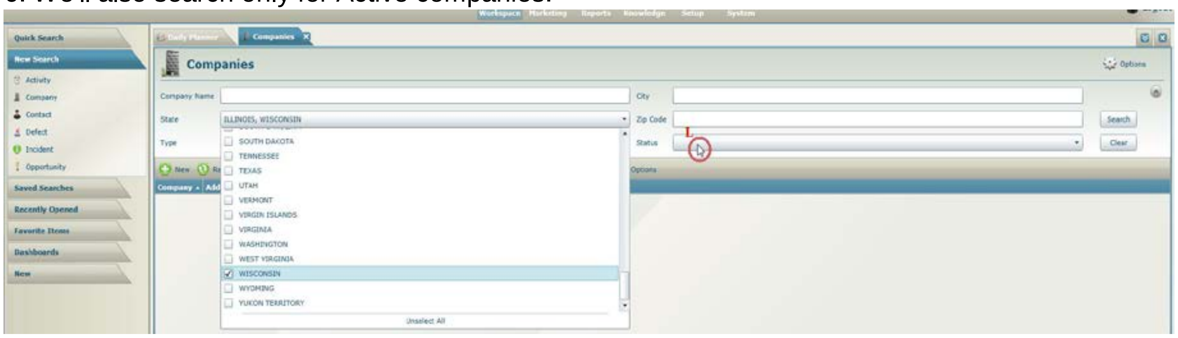


Using New Search

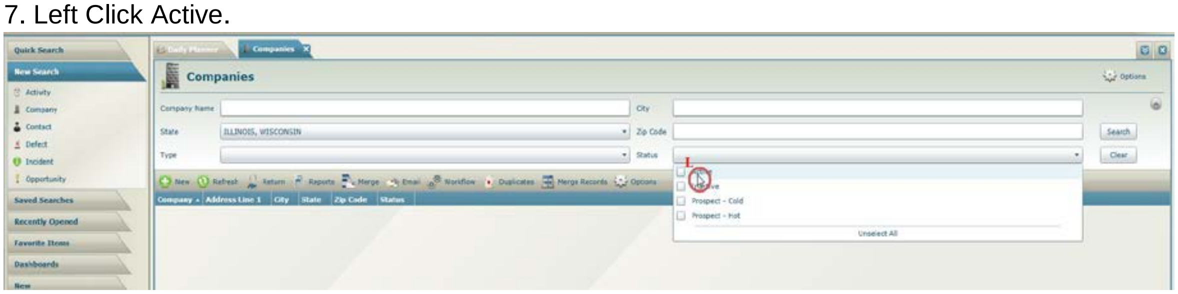
5. And we will also select Wisconsin.



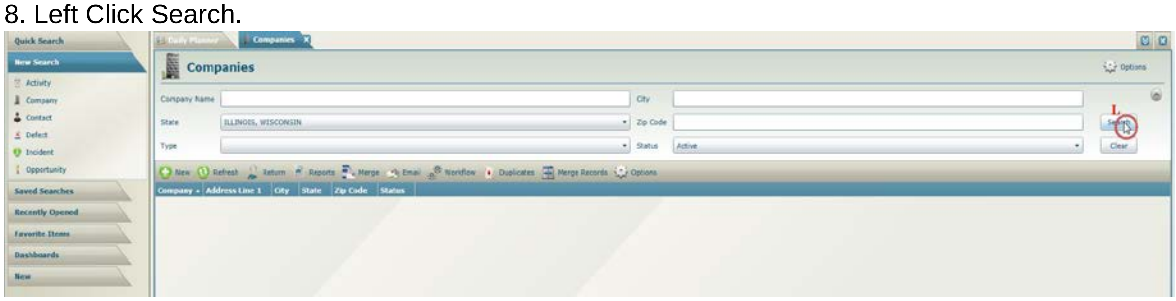
6. We'll also search only for Active companies.



7. Left Click Active.



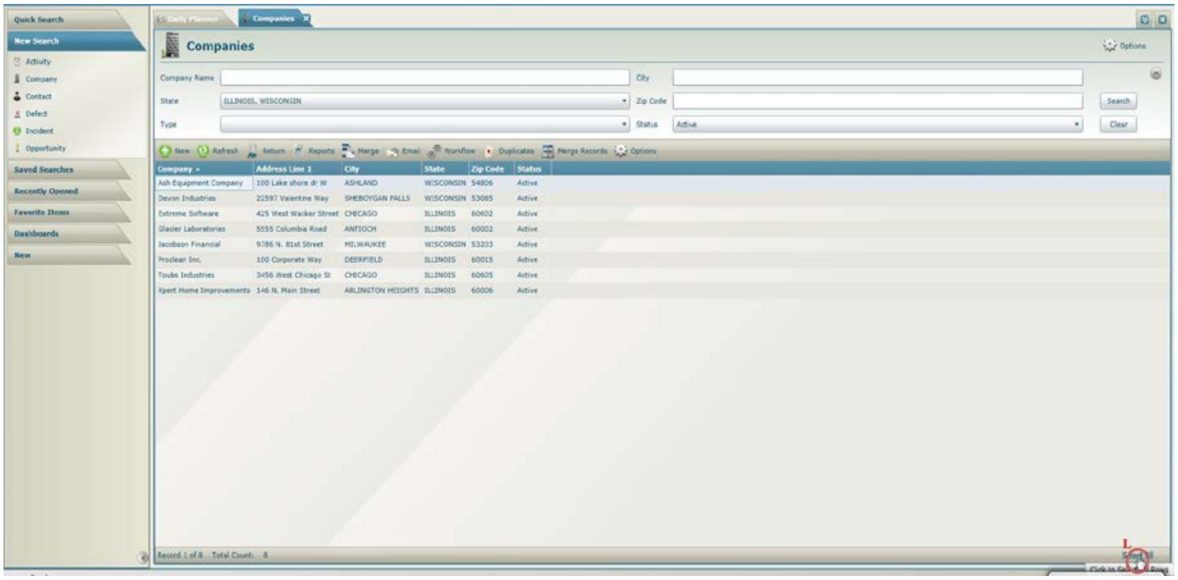
8. Left Click Search.



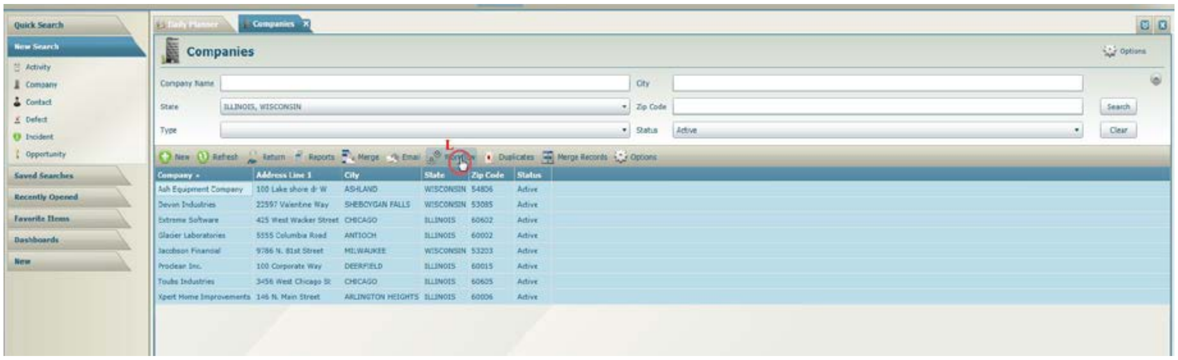
9. Your search results are displayed. Once you have located records, you can use Workflow to take action on them. In this example, we will assign an Activity for Anna to call these companies.

Using New Search

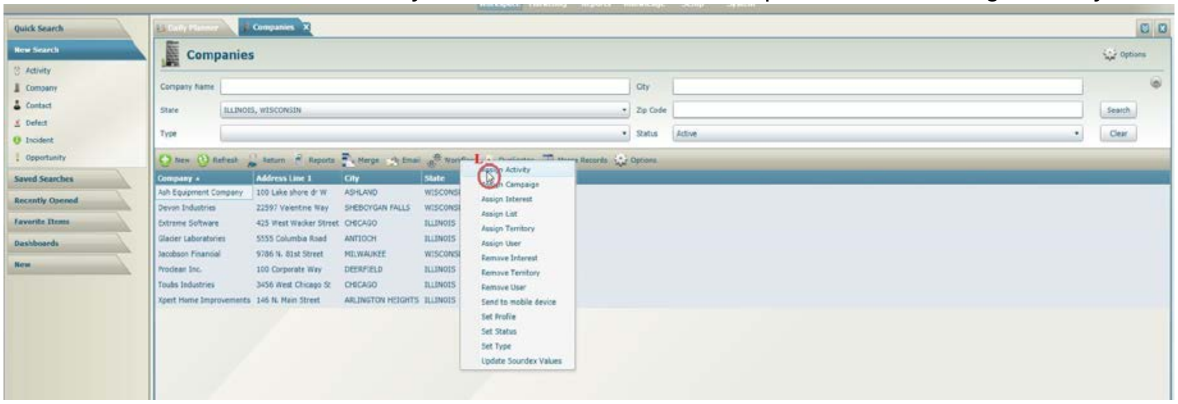
Click the Select All link.



10. Left Click Workflow.

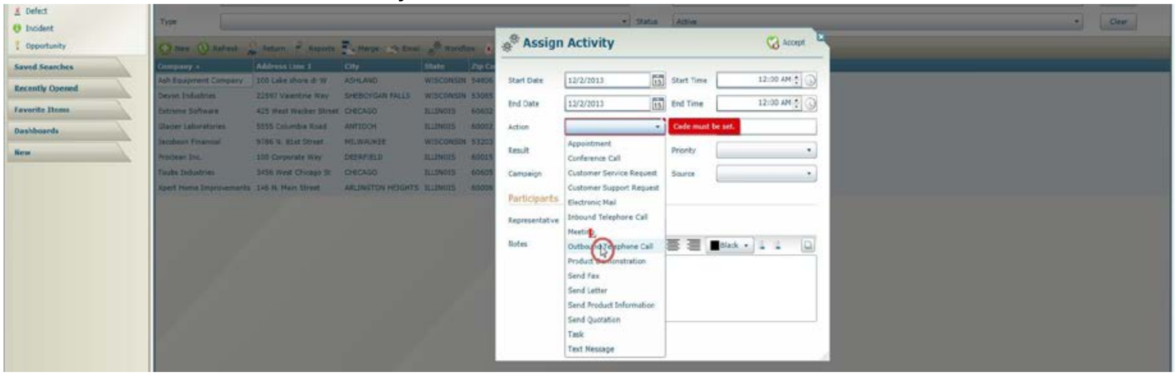


11. Left Click to choose the action you want to take. In this example, we chose Assign Activity.

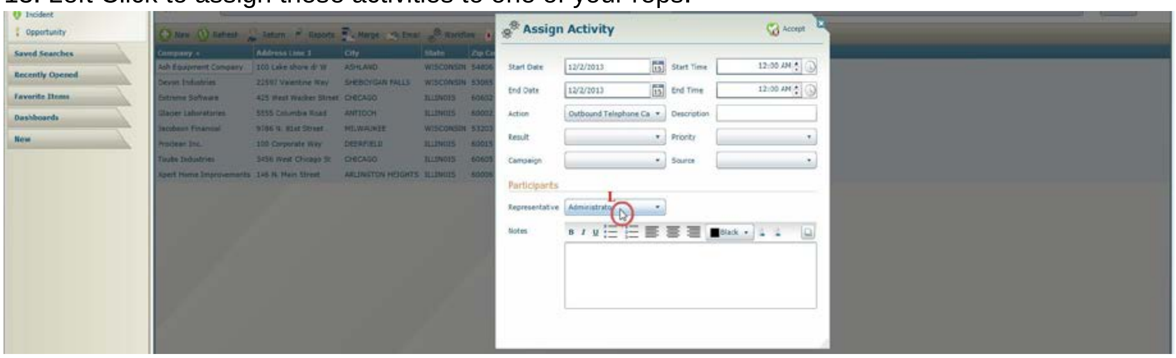


Using New Search

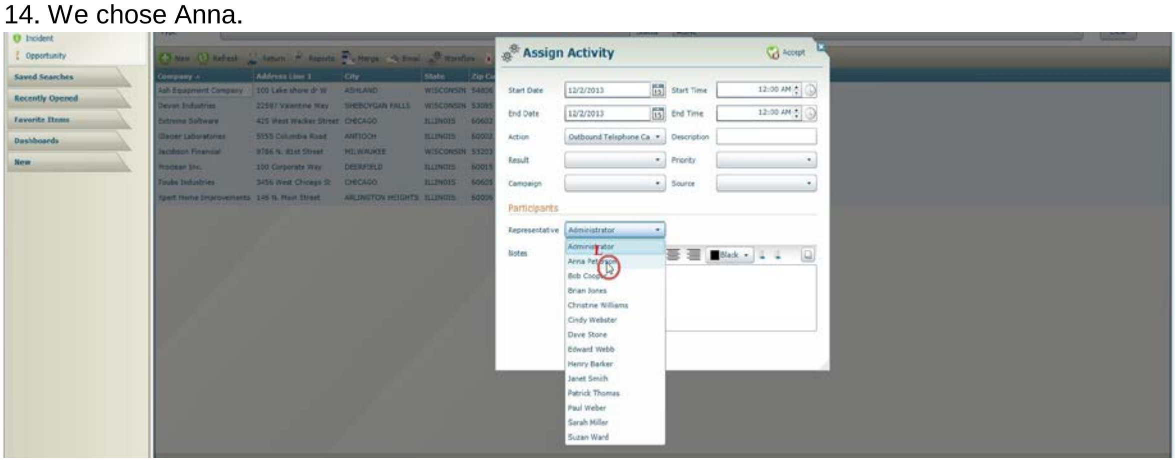
12. Left Click to select the Action you want. We selected Outbound Phone call.



13. Left Click to assign these activities to one of your reps.

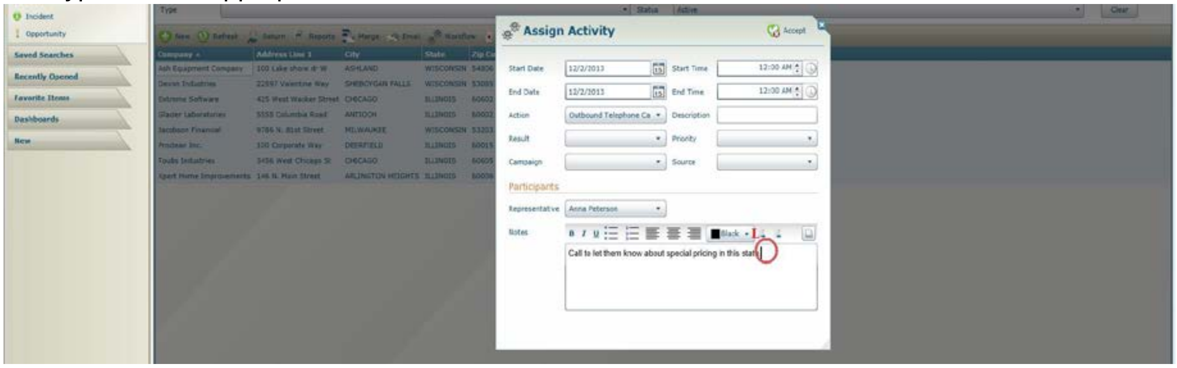


14. We chose Anna.

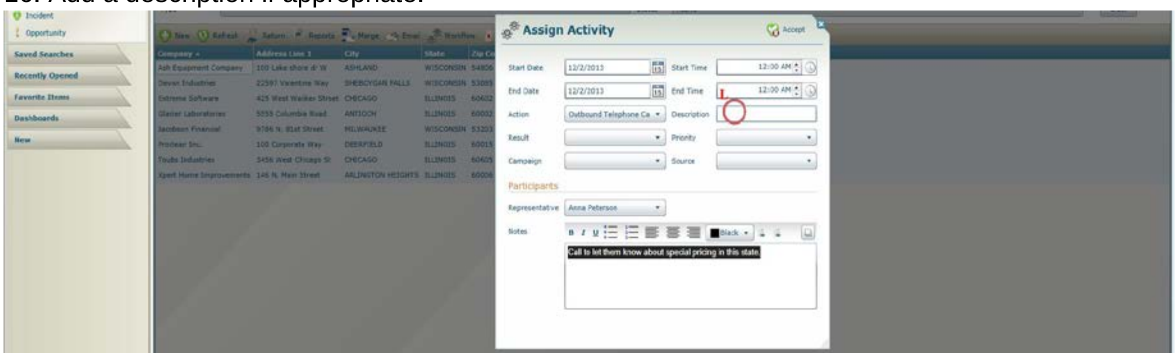


Using New Search

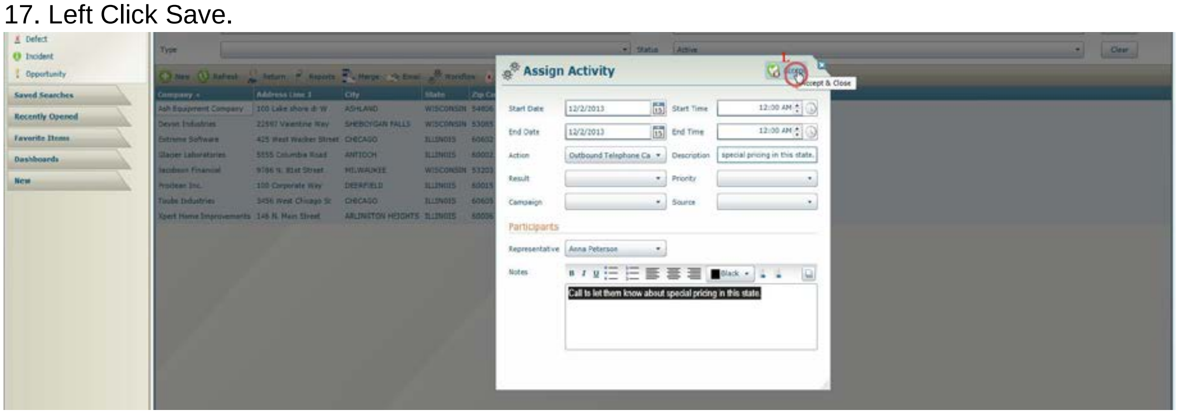
15. Type notes if appropriate.



16. Add a description if appropriate.



17. Left Click Save.



18. The Activity records are created, and will be displayed on Anna's To-Do list.