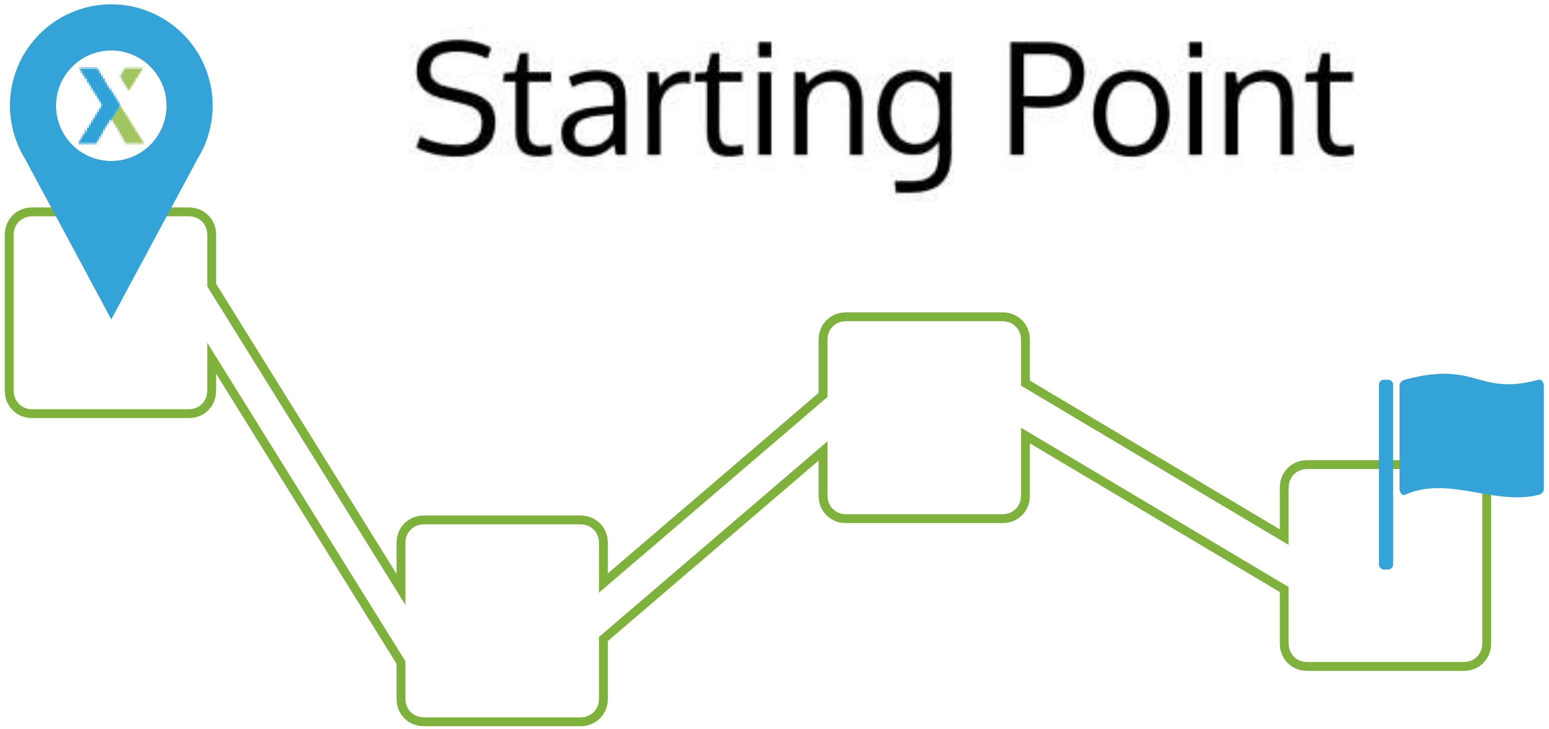
Session 4
Grids and Searching



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The Who and the What

Searching Tools

Reporting Tools

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Todays Topics

- Why do I need to use Grid Templates?
- Grid Filters
- Building Grid Templates
- Quick and Advanced Searching
- Report Assistant
- Pre-Built Reports

Grid Basics

0 items selected Select All Select Page Select None

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z - ALL

DRAG A COLUMN HEADER AND DROP IT HERE TO GROUP BY THAT COLUMN

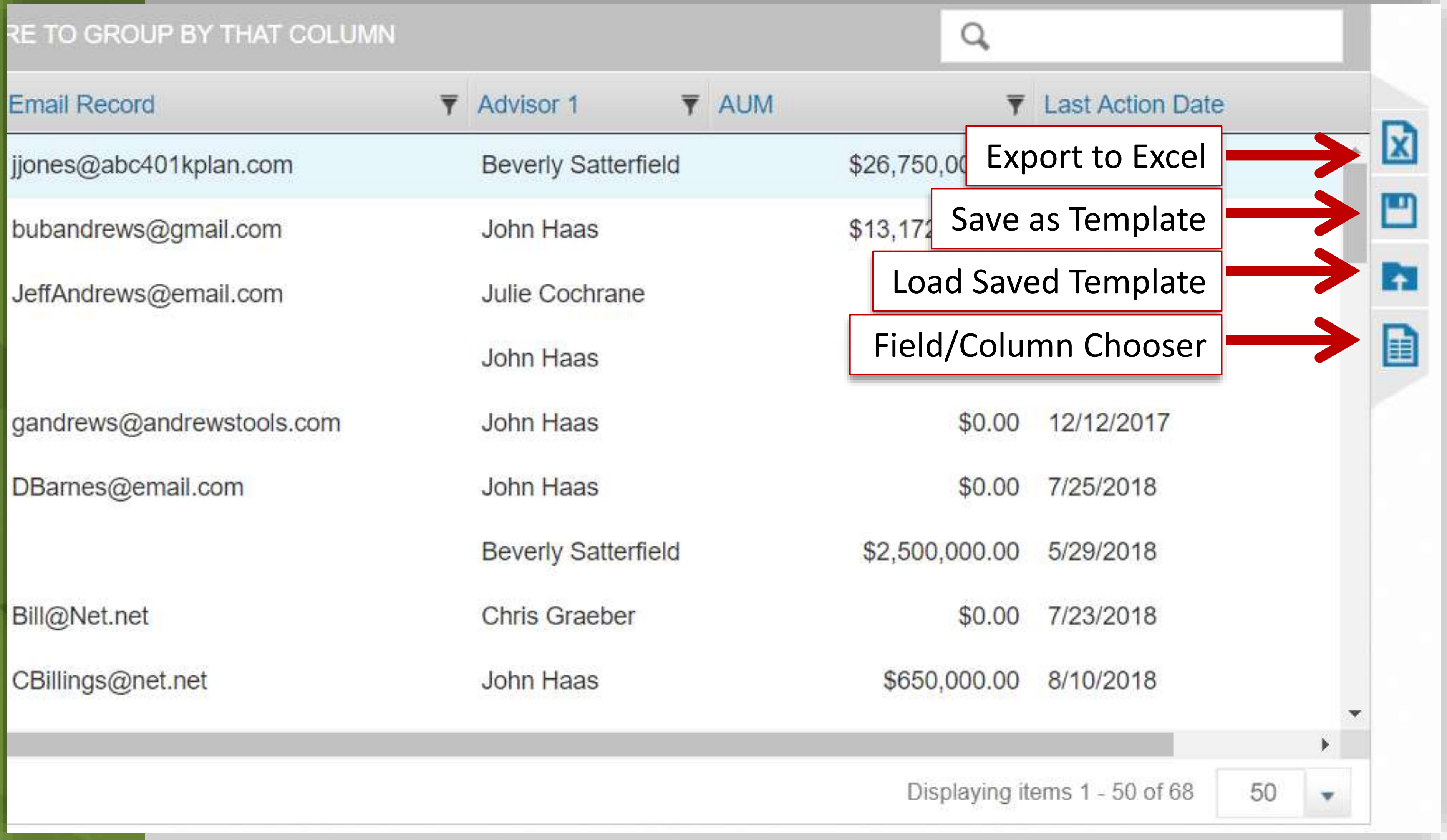
Record Name	Phone Primary Record	Email Record	Advisor 1	AUM	Last Action Date
ABC 401k Plan	(432) 555-4545	jjones@abc401kplan.com	Beverly Satterfield	$26,750,000.00	6/11/2018
Andrews - George & Sally	(555) 666-7878	bubandrews@gmail.com	John Haas	$13,172,454.66	8/10/2018
Andrews - Jeff	(555) 555-4321	JeffAndrews@email.com	Julie Cochrane	$162,500.00	8/8/2018
Andrews Family Trust			John Haas	$20,000,000.00	3/8/2018
Andrews Tools	(555) 555-1212	gandrews@andrewstools.com	John Haas	$0.00	12/12/2017
Barnes - Deborah	(555) 555-9876	DBarnes@email.com	John Haas	$0.00	7/25/2018
Barnes - Richard	(919) 846-7187		Beverly Satterfield	$2,500,000.00	5/29/2018
Beason - Bill and Sarah	(555) 555-2323	Bill@Net.net	Chris Graeber	$0.00	7/23/2018
Billings - Rick and Judy	5555551313	CBillings@net.net	John Haas	$650,000.00	8/10/2018

1 2

Displaying items 1 - 50 of 68 50

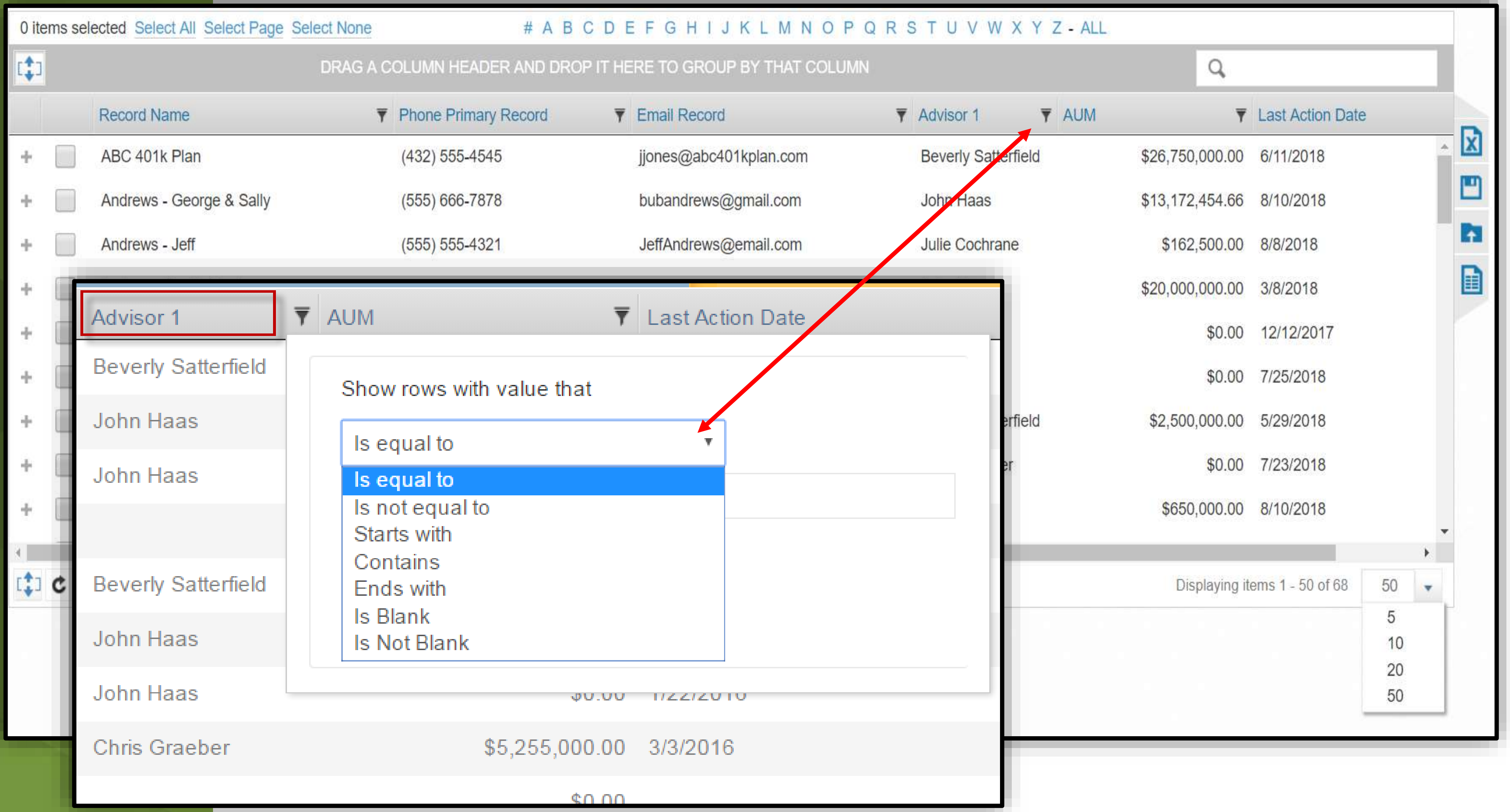
5
10
20
50

Grid Basics



RE TO GROUP BY THAT COLUMN
Email Record
Advisor 1
AUM
Last Action Date
jjones@abc401kplan.com
Beverly Satterfield
$26,750,00
bubandrews@gmail.com
John Haas
$13,172
JeffAndrews@email.com
Julie Cochrane
John Haas
gandrews@andrewstools.com
John Haas
$0.00
12/12/2017
DBarnes@email.com
John Haas
$0.00
7/25/2018
Beverly Satterfield
$2,500,000.00
5/29/2018
Bill@Net.net
Chris Graeber
$0.00
7/23/2018
CBillings@net.net
John Haas
$650,000.00
8/10/2018
Displaying items 1 - 50 of 68
50
Export to Excel
Save as Template
Load Saved Template
Field/Column Chooser

Grid Basics



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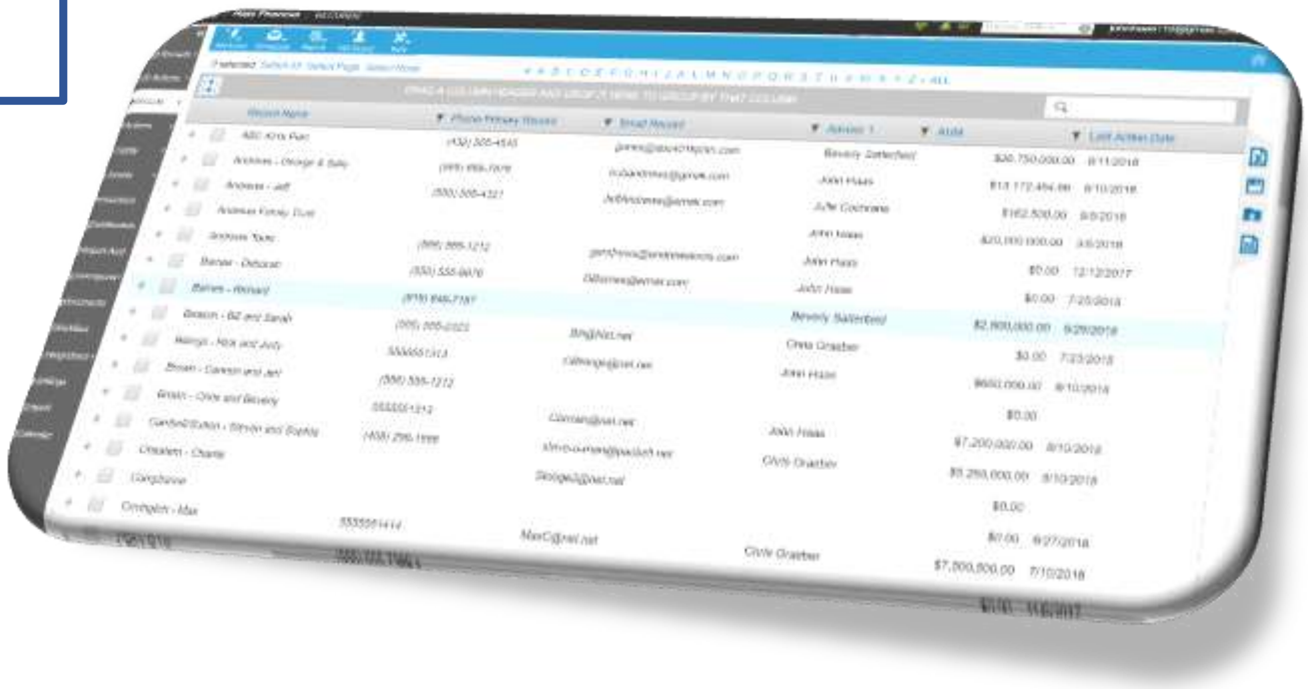
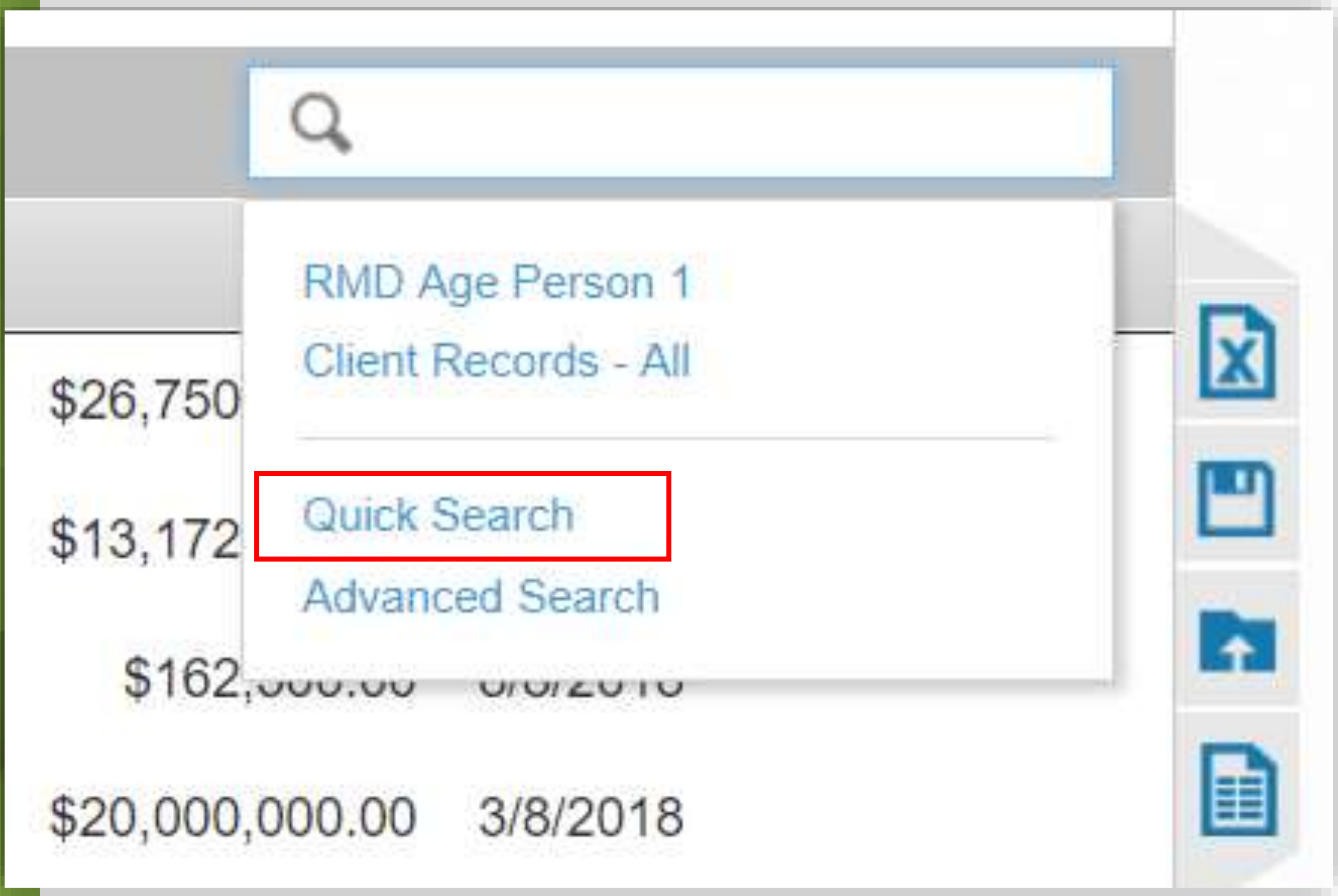
Building Grid Templates

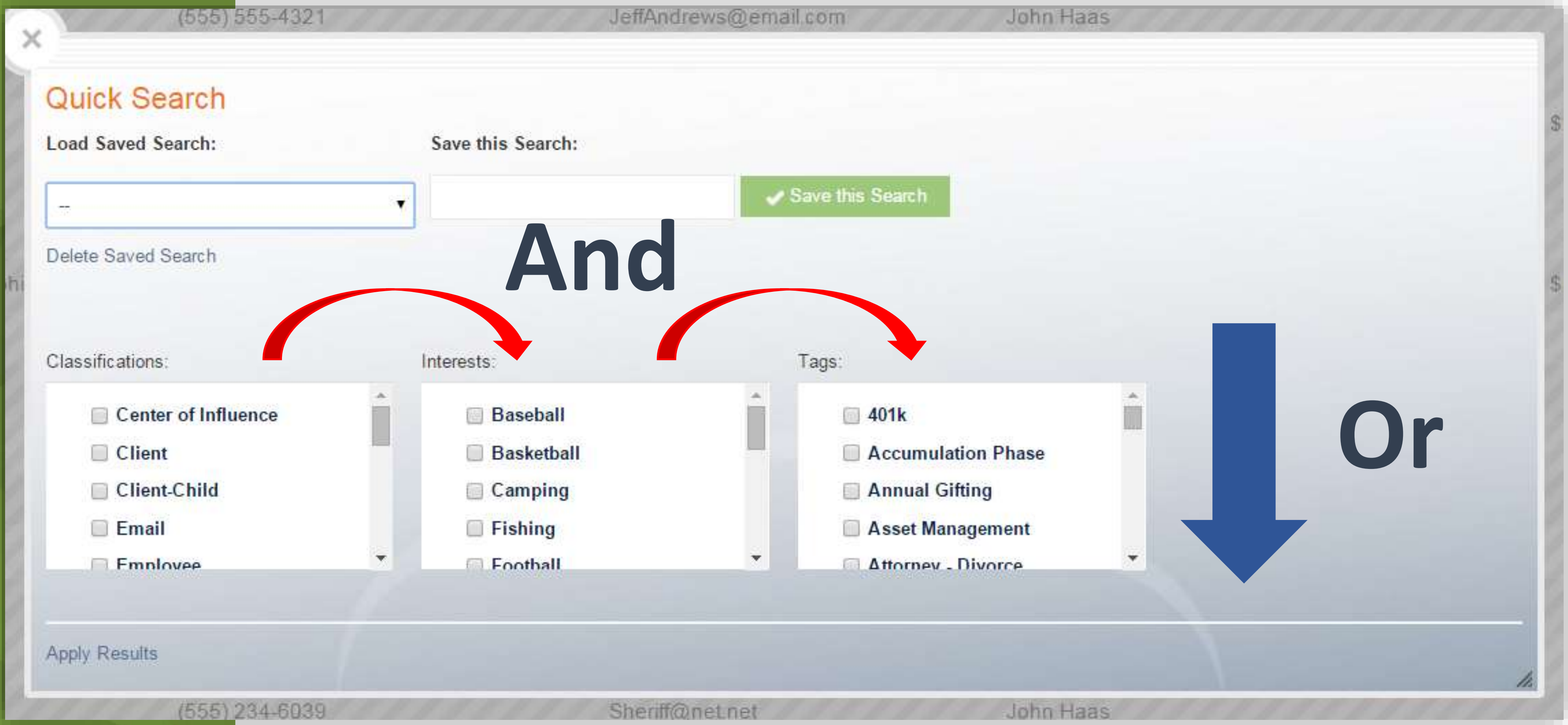
1. Select your columns
2. Reorder your columns
3. Apply filters if needed
4. Save it as a template



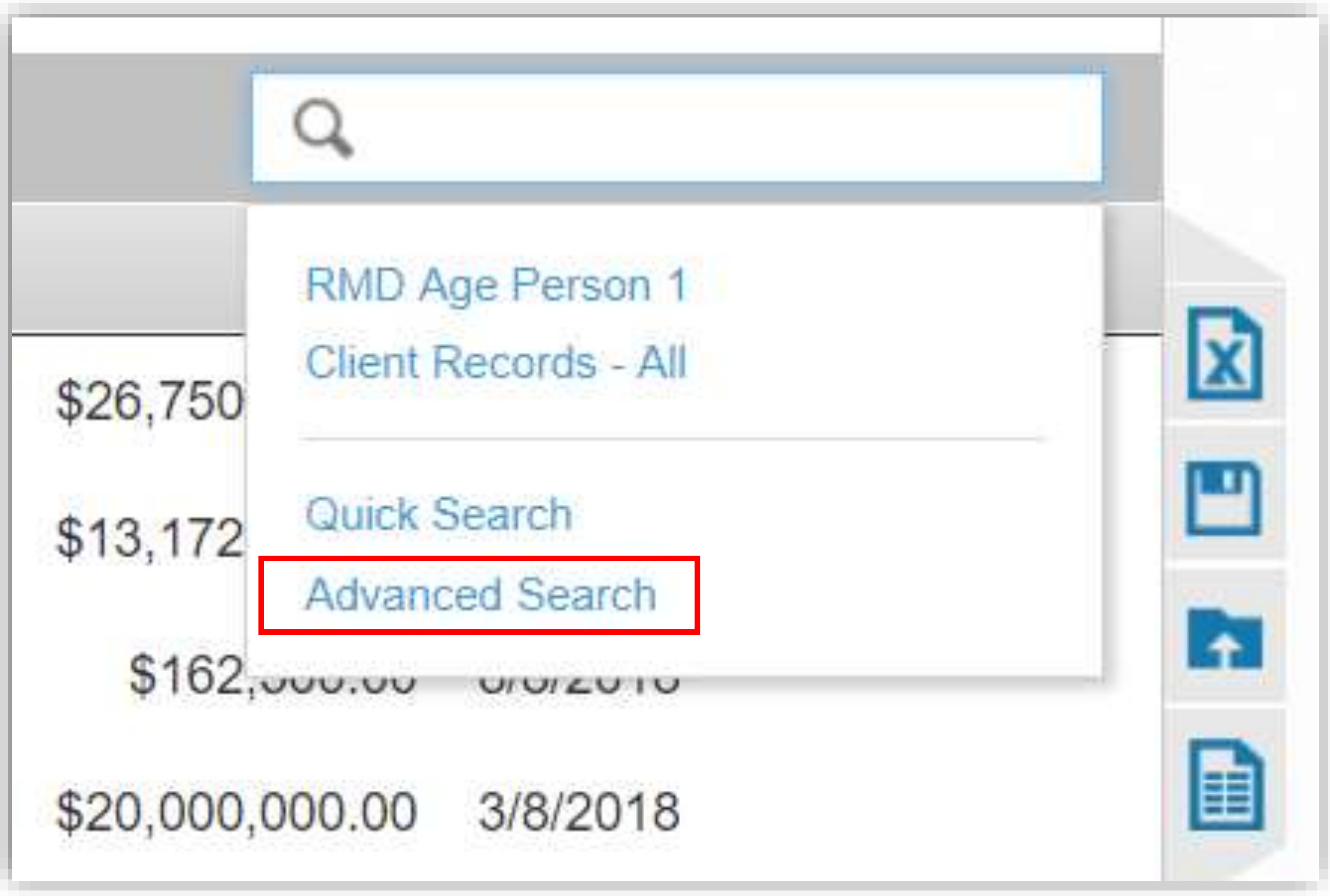
Quick Search - for the Who



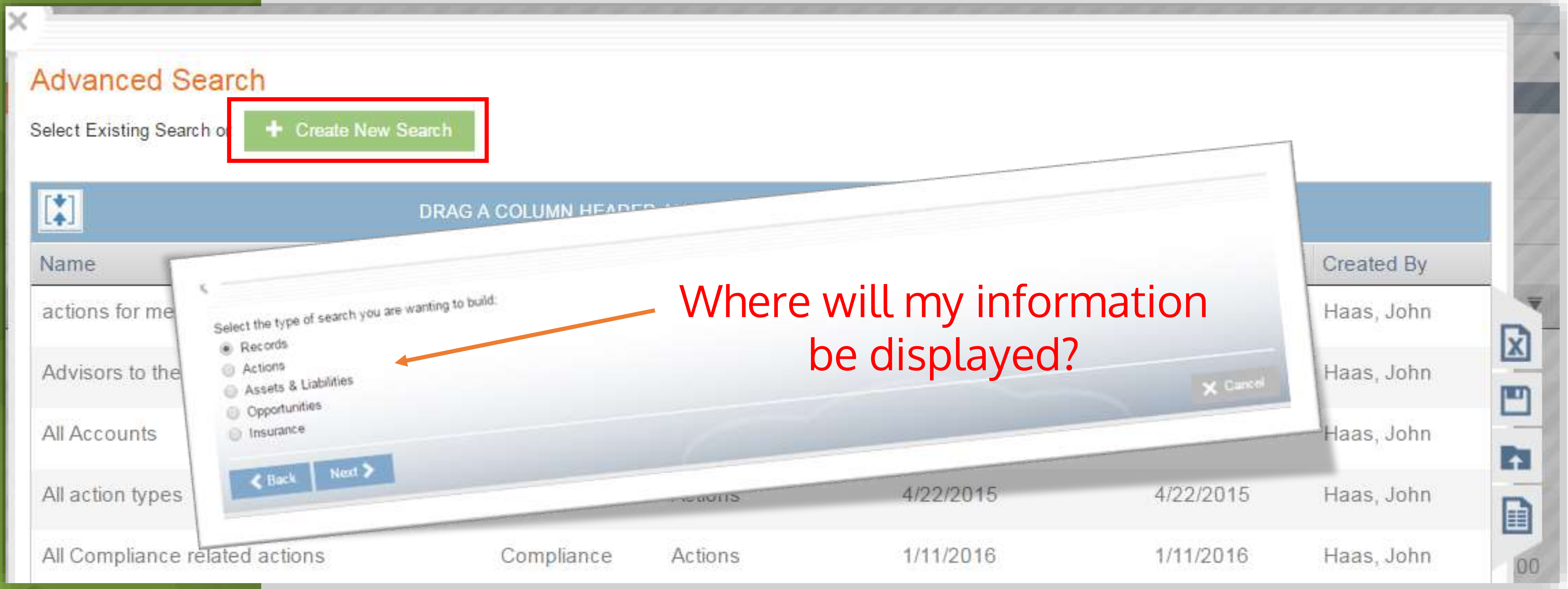
Quick Search - for the Who



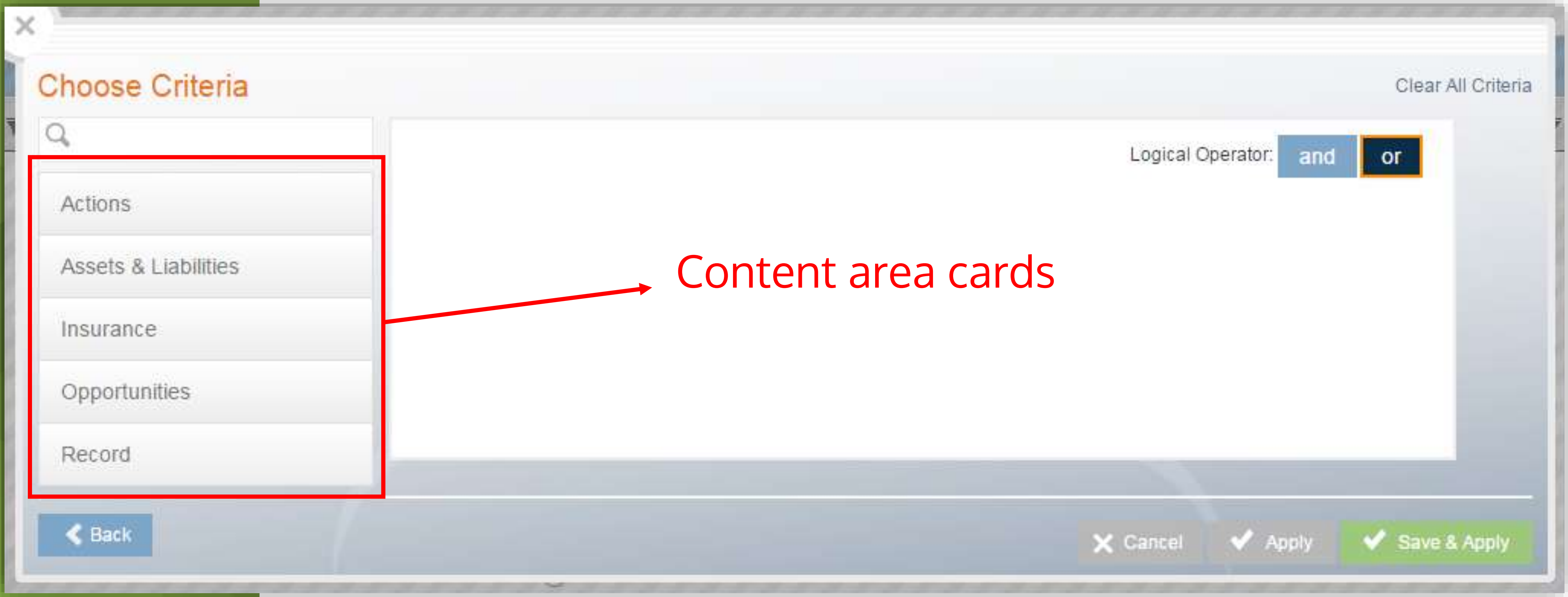
Advanced Search - for the Who



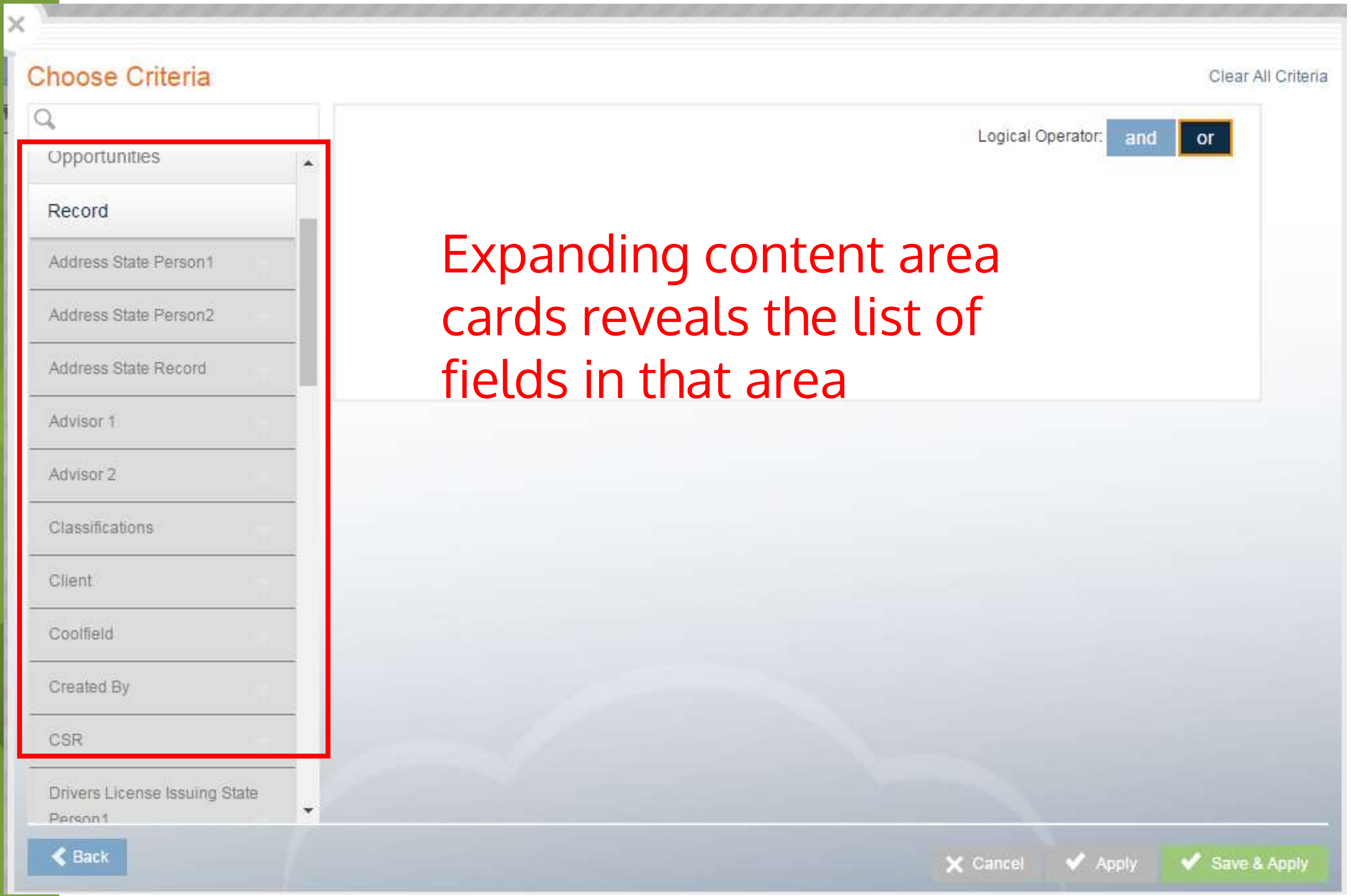
Advanced Search - for the Who



Advanced Search - for the Who

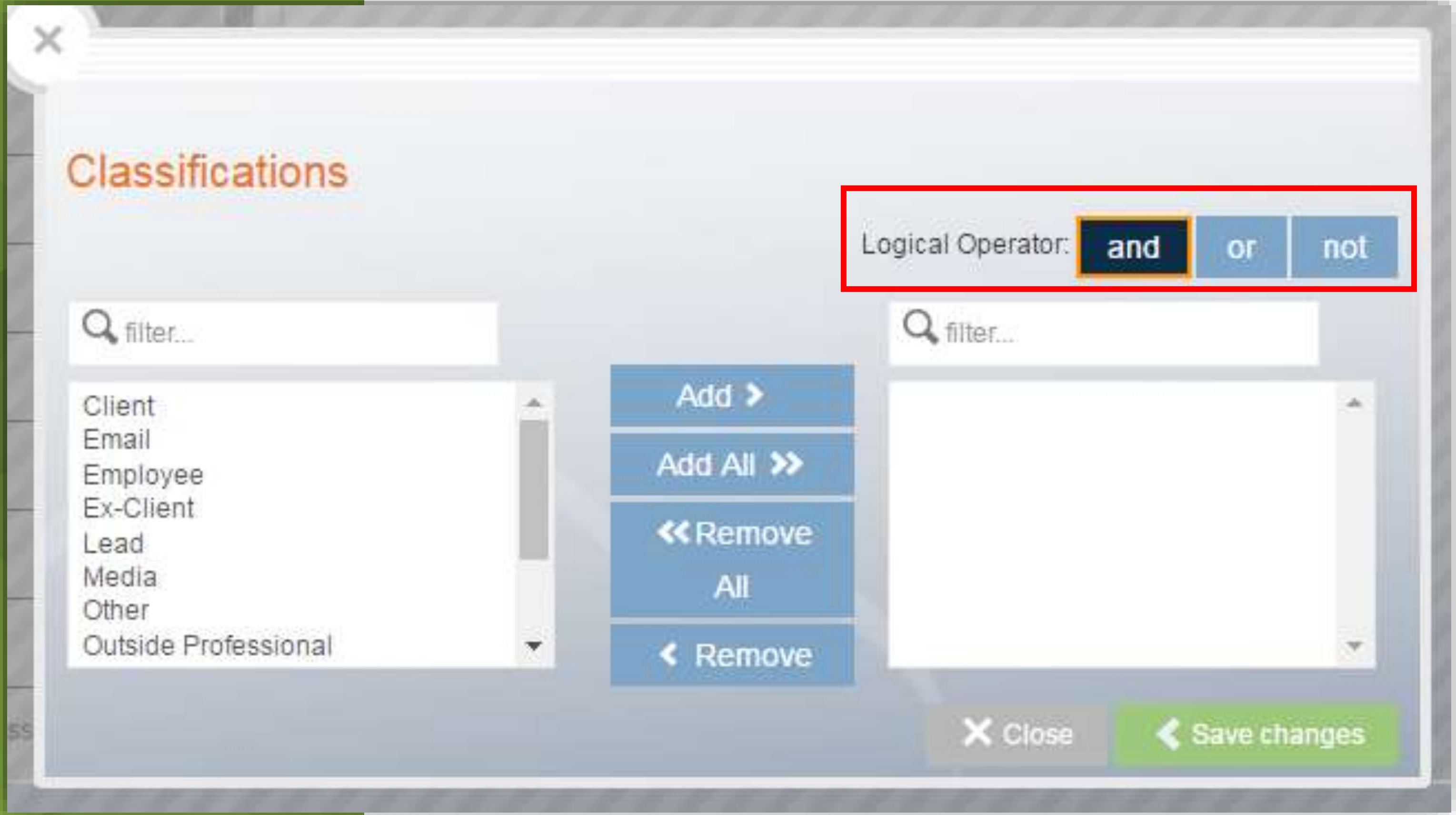


Advanced Search - for the Who



Expanding content area cards reveals the list of fields in that area

Advanced Search - for the Who



Display for fields that contain a list of items

Advanced Search - for the Who

Display for fields that are single data points

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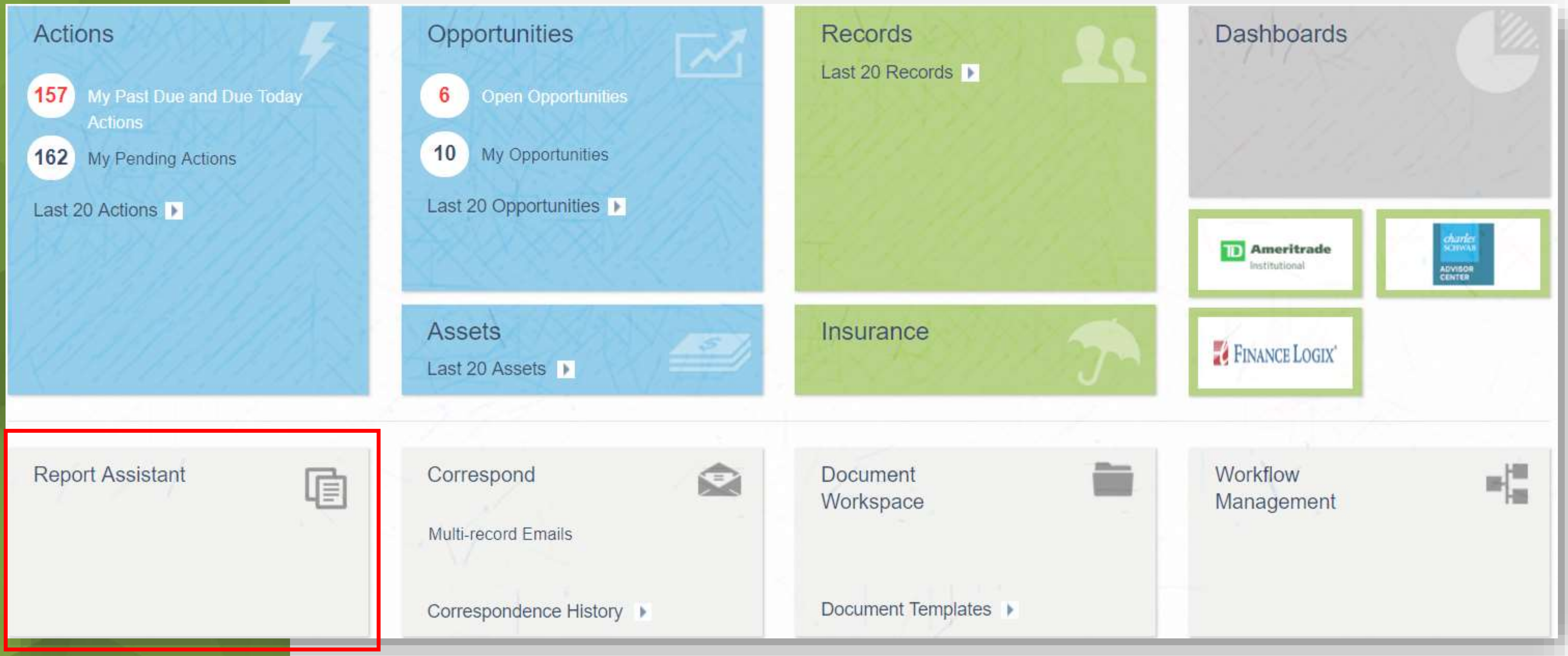
Report Assistant

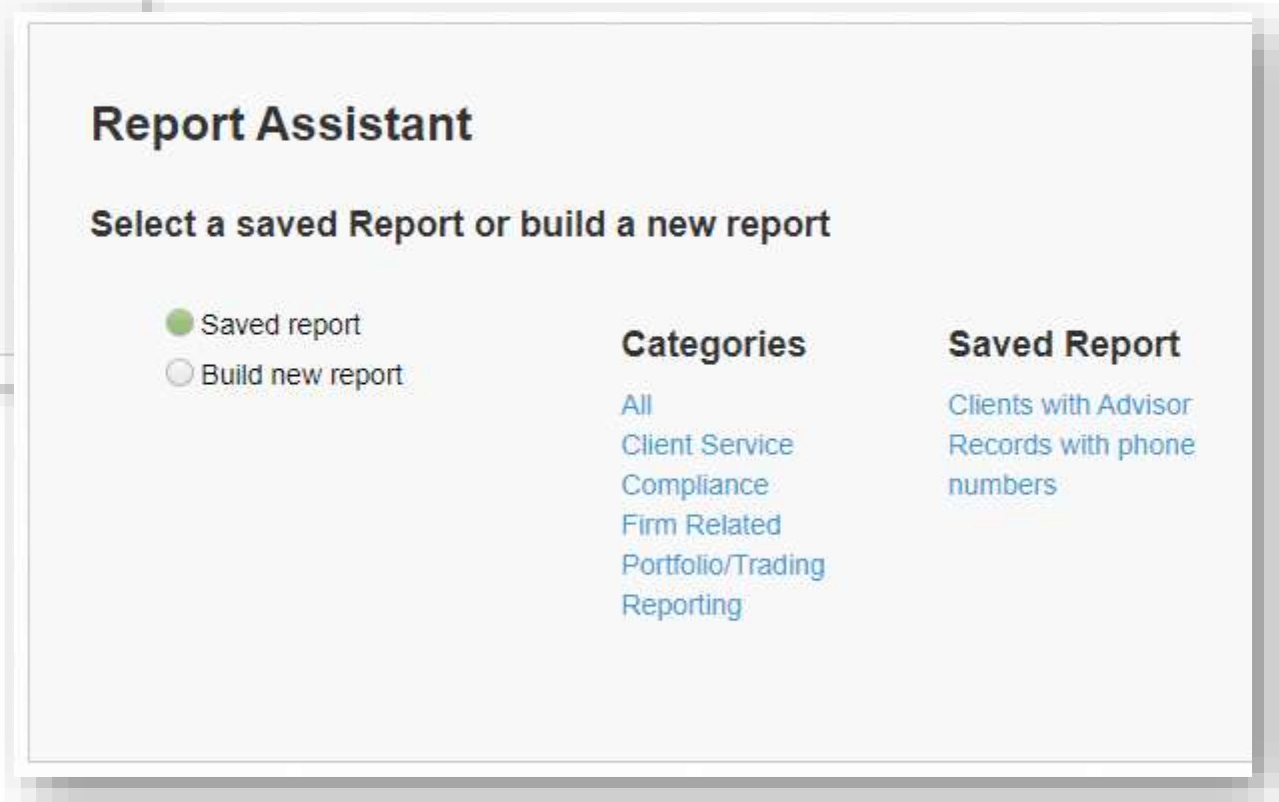
Where the Who and the What come together

1. What type of information is needed?
2. Who do you want information about?
3. What information do you need?
4. How do you want it displayed?

Report Assistant



Report Assistant



Who

Report Assistant

Financial : REPORT ASSISTANT   46   Record Search   johnhaas110@gmail.com   ?

Report Assistant

Select or Create an Advanced Search

To build a new report you need to have an **advanced search** associated with it. You can either:

1. Create a **new advanced search**
2. Use a previously **saved advanced search**
3. Edit an existing **saved advanced search** and save it with the same name
4. Edit an existing **saved advanced search** and save it with a new name

Create a New Advanced Search

New Advanced Search

Note: *When you save your new advanced search it will be automatically selected for you in the "Select an Advanced Search" drop down below. Just hit next to continue.*

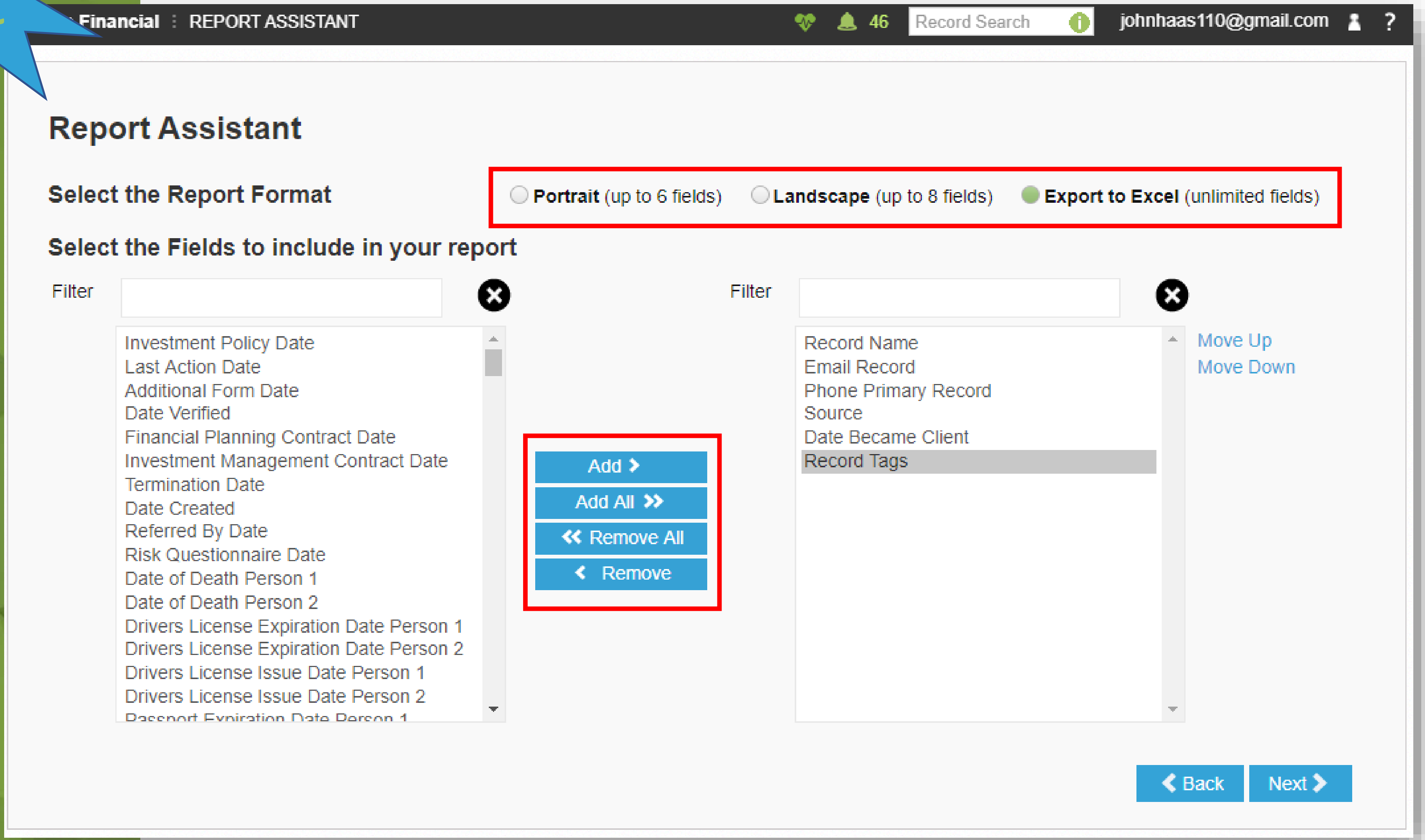
Available Saved Advanced Searches

Select a Category: Client Lists ▾   Select an Advanced Search: John and Julie clients ▾   Edit Selected Advanced Search

‹ Back   Next ›

Report Assistant

What



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Report Assistant

Report Assistant

Here are your results

Generate as PDF Report

DRAG A COLUMN HEADER AND DROP IT HERE TO GROUP BY THAT COLUMN

Record Name	Email Record	Phone Primary Record	Source	Date Beca...	Record Tags
Andrews - George & Sally	bubandrews@gmail.com	(555) 666-7878	Referral	9/1/1995	ABC Event - Attended ,Clien Planning,Financial Planning Spouse,Meet Freq-Q,Newsl Person2,SEC Audit 2015,Sn
Andrews - Jeff	JeffAndrews@email.com	(555) 555-4321	Referral - Strategic Partner	2/9/2016	Client-Platinum,Client-Silver Card,Meet Freq-Q,Newslette Invited
Billings - Rick and Judy	CBillings@net.net	5555551313	Referral	4/20/2016	ABC Event - Invited,ABC Ev Gold,College Planning,News Event - Invited
Brown - Chris and Beverly	Cbrown@net.net	5555551313	Referral	5/6/2016	ABC Event - Invited,ABC Ev Gold,College Planning,Mino Invited
Critchfield - Brad & Andrea	Bcritchfield@net.net	(555) 987-1236			College Planning,Financial F Child,Newsletter

1 2 3 4 5

Displaying items 1 - 5 of 23

5

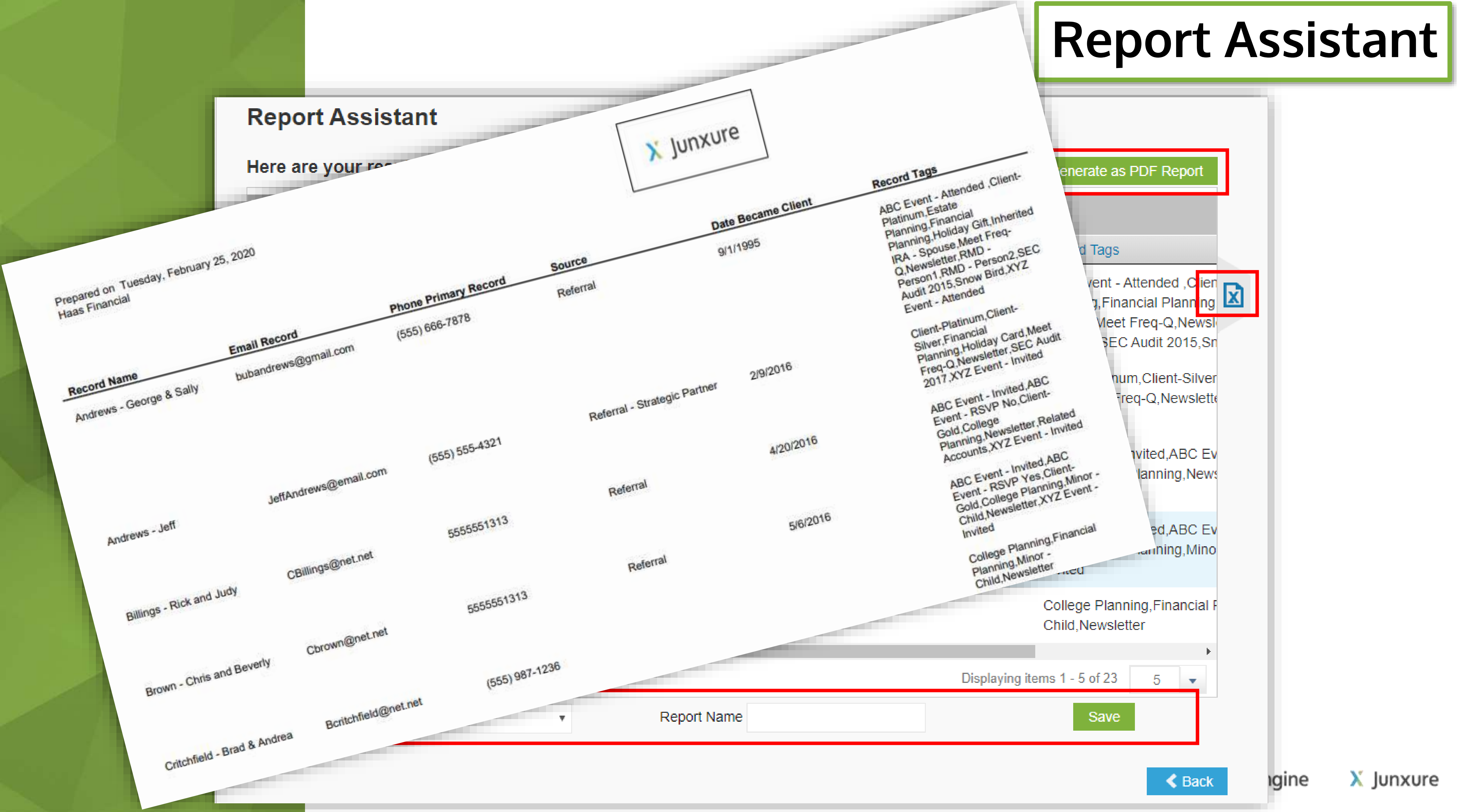
Report Category: Client Service

Report Name:

Save

Back

Report Assistant



Prepared on Tuesday, February 25, 2020
Haas Financial

Record Name	Email Record	Phone Primary Record	Source	Date Became Client	Record Tags
Andrews - George & Sally	bubandrews@gmail.com	(555) 666-7878	Referral	9/1/1995	ABC Event - Attended ,Client-Platinum,Estate Planning,Financial Planning,Holiday Gift,Inherited IRA - Spouse,Meet Freq-Q,Newsletter,RMD - Person1,RMD - Person2,SEC Audit 2015,Snow Bird,XYZ Event - Attended
Andrews - Jeff	JeffAndrews@email.com	(555) 555-4321	Referral - Strategic Partner	2/9/2016	Client-Platinum,Client-Silver,Financial Planning,Holiday Card,Meet Freq-Q,Newsletter,SEC Audit 2017,XYZ Event - Invited
Billings - Rick and Judy	CBillings@net.net	5555551313	Referral	4/20/2016	ABC Event - Invited,ABC Event - RSVP No,Client-Gold,College Planning,Newsletter,Related Accounts,XYZ Event - Invited
Brown - Chris and Beverly	Cbrown@net.net	5555551313	Referral	5/6/2016	ABC Event - Invited,ABC Event - RSVP Yes,Client-Gold,College Planning,Minor - Child,Newsletter,XYZ Event - Invited
Critchfield - Brad & Andrea	Bcritchfield@net.net	(555) 987-1236			College Planning,Financial Planning,Minor - Child,Newsletter

Report Assistant

Impactful Prebuilt Reports

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Starting Point

Ensure your success by finishing this series!

Next Session:

Email Integrations