



Starting Point Series





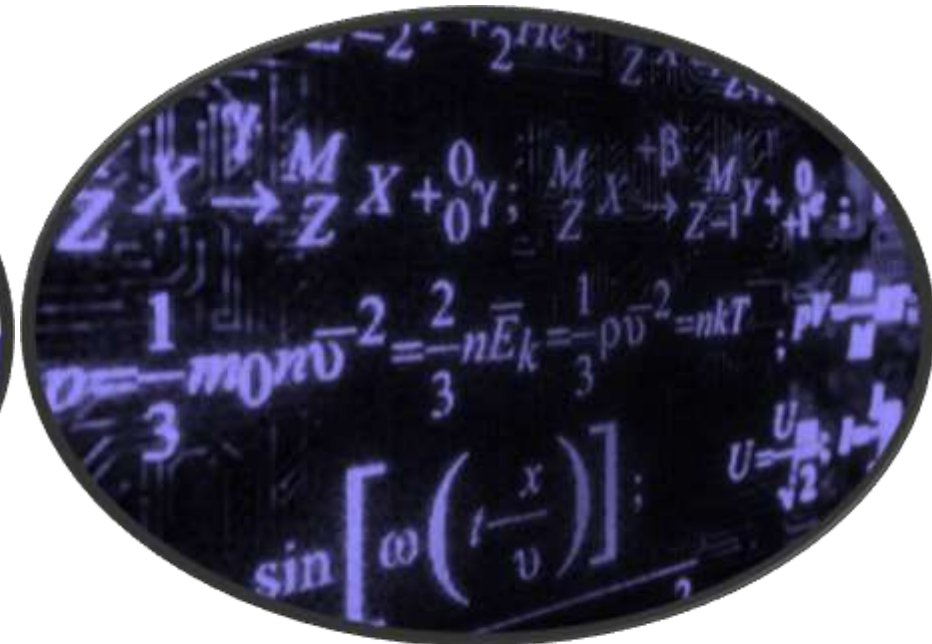
Grids, Searching, & Reporting

The Who & the What

Searching Tools



Reporting Tools



Today's Topics

- Why do I need Grid Templates?
- Grid Filters
- Building Templates
- Quick & Advanced Searches
- Report Assistant
- Prebuilt Reports

Records

Add Action

Email

Documents

Reports

Add Record

Tools

0 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	Service Level	Advisor 1	AUM	First Name Person 1	First Name Person 2	Last Action Date
+	<input type="checkbox"/>	51 Anthropologie	(555) 666-4444	pres@anthropologie.com		Tricia Cameron	\$0.00	Gina		4/12/2021
+	<input type="checkbox"/>	ABC 401k Plan	(432) 555-4545 x	jjones@abc401kplan.com		John Henry	\$0.00	Julie		3/1/2022
+	<input type="checkbox"/>	Andrews - George & Sally	(555) 555-0000	Home@home.net	Platinum	Tricia Cameron	\$13,614,954.66	George	Sally	3/1/2022
+	<input type="checkbox"/>	Andrews - Jeff	(555) 555-4321 x	JeffAndrews@email.com		John Henry	\$0.00	Jeff		2/14/2022
+	<input type="checkbox"/>	Andrews Family Trust	(555) 555-5555			Tricia Cameron	\$0.00	Andrews		1/19/2022
+	<input type="checkbox"/>	Atherton - Clark and Elise	(620) 422-2230	iraisecows@email.net		Tricia Cameron	\$0.00	Clark	Elise	3/1/2022
+	<input type="checkbox"/>	Austin - Geoff and Sarah	919-555-1212	Geoff@Austinfirmllc.net		John Henry	\$0.00	Geoff	Sarah	3/1/2022
+	<input type="checkbox"/>	Austin Tools Company Inc	310-656-5656	Info@Austintoolscoinc.com		John Henry	\$0.00	Geoff		4/12/2021
+	<input type="checkbox"/>	Barnes - Deborah	(555) 555-9876 x	DBarnes@email.com		John Henry	\$0.00	Deborah		8/23/2021
+	<input type="checkbox"/>	Barnes - Richard	(919) 846-7187	RichBarnes@email.com		Tricia Cameron	\$0.00	Richard T.		7/23/2021
+	<input type="checkbox"/>	Beck - Gwendolyn	(934) 224-4466	foodislife@net.net		Tricia Cameron	\$0.00	Gwendolyn		3/1/2022
+	<input type="checkbox"/>	Bennett/Edgerley - Clayton and O...	(843) 477-7788	eatbythewater@bennetts.com	Platinum	John Henry	\$732,000.00	Clayton	Ophelia	3/1/2022
+	<input type="checkbox"/>	Benson - Olivia	(718) 601-1001	cptbenson@nypd-svu.com	Silver	Tricia Cameron	\$0.00	Olivia		3/1/2022
+	<input type="checkbox"/>	Bishop - Peter & Olivia	(617) 622-4401	bishopfam@mailing.com		Tricia Cameron	\$0.00	Peter	Olivia	6/7/2021
+	<input type="checkbox"/>	Brown - Charles	(919) 555-5251	cbrown@peanutz.com	Platinum	Tricia Cameron	\$200,069.00	Charles		3/1/2022
+	<input type="checkbox"/>	Cameron Wealth Management	(919) 555-5500	info@cwmlc.com			\$0.00			2/28/2022
+	<input type="checkbox"/>	Campbell/Sutton - Steven and Sop...	(408) 296-7750	steve-o-man@pacbell.net		Tricia Cameron	\$0.00	Steven	Sophia	3/1/2022
+	<input type="checkbox"/>	Carmichael - Abbott and Ophelia	(828) 621-3345	artislife@net.net	Gold	John Henry	\$0.00	Abbott	Ophelia	3/1/2022
+	<input type="checkbox"/>	David - Aubrey	(919) 221-5555	aad1984@email.com		Tricia Cameron	\$0.00	Aubrey		4/29/2021
+	<input type="checkbox"/>	Dewey, Stealer, Cash & Skipper Law	(213) 555-5511	info@dscslaw.com			\$0.00	Duncan		4/12/2021



1 2 3 4 > >>

1 - 20 of 70

20

<div><div></div><div></div><div></div></div>	
First Name Person 2	Last Action Date
	4/12/2021
	3/1/2022
Sally	3/1/2022
	2/14/2022
	1/19/2022



Export to Excel

Save View

Load View

Column Chooser

Grid Basics - Filters

Records

Add Action
Email
Documents
Reports
Add Record

0 SELECTED
ALL
PAGE
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	SERVICE LEVEL	ADVISOR 1	AUM	FIRST NAME PERSON 1	FIRST NAME PERSON 2	LAST ACTION DATE
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+ <input type="checkbox"/>	Andrews - George & Sally	(555) 555-0000	Home@home.net	Platinum	Tricia Cameron	\$13,614,954.66	George	Sally	2/24/2022
+ <input type="checkbox"/>	Andrews - Jeff	(555) 555-4321 x	JeffAndrews@email.com		John Henry	\$0.00	Jeff		2/14/2022
+ <input type="checkbox"/>	Andrews Family Trust	(555) 555-5555			Tricia Cameron	\$0.00	Andrews		1/19/2022
+ <input type="checkbox"/>	Atherton - Clark and Elise	(620) 422-2230	iraisecows@email.net		Tricia Cameron	\$0.00	Clark	Elise	2/24/2022
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+ <input type="checkbox"/>	Austin Tools Company Inc	310-656-5656	Info@Austintoolscoinc.com		John Henry	\$0.00	Geoff		4/12/2021
+ <input type="checkbox"/>	Barnes - Deborah	(555) 555-987			John Henry	\$0.00	Deborah		8/23/2021
+ <input type="checkbox"/>	Barnes - Richard	(919) 846-718			Tricia Cameron	\$0.00	Richard T.		7/23/2021
+ <input type="checkbox"/>	Beck - Gwendolyn	(934) 224-446			Tricia Cameron	\$0.00	Gwendolyn		2/24/2022
+ <input type="checkbox"/>	Bennett/Edgerley - Clayton and O...	(843) 477-778			John Henry	\$732,000.00	Clayton	Ophelia	2/24/2022
+ <input type="checkbox"/>	Benson - Olivia	(718) 601-100			Tricia Cameron	\$0.00	Olivia		2/24/2022
+ <input type="checkbox"/>	Bishop - Peter & Olivia	(617) 622-440			Tricia Cameron	\$0.00	Peter	Olivia	6/7/2021
+ <input type="checkbox"/>	Brown - Charles	(919) 555-525			Tricia Cameron	\$200,069.00	Charles		2/24/2022
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+ <input type="checkbox"/>	Campbell/Sutton - Steven and Sop...	(408) 296-7750	steve-o-man@pacbell.net		Tricia Cameron	\$0.00	Steven	Sophia	2/24/2022
+ <input type="checkbox"/>	Carmichael - Abbott and Ophelia	(828) 621-3345	artislife@net.net	Gold	John Henry	\$0.00	Abbott	Ophelia	2/24/2022
+ <input type="checkbox"/>	David - Aubrey	(919) 221-5555	aad1984@email.com		Tricia Cameron	\$0.00	Aubrey		4/29/2021
+ <input type="checkbox"/>	Dewey, Stealer, Cash & Skipper Law	(213) 555-5511	info@dscslaw.com			\$0.00	Duncan		4/12/2021

Show rows with value that

Is equal to

CLEAR FILTER
FILTER

1
2
3
4
>
>

1 - 20 of 70
20

Building Grid Templates

- Select your columns/fields
- Reorder your columns
- Apply filters if needed
- Save it as a template



The image shows a tablet displaying a data grid template. The grid has multiple columns and rows of data. The columns include fields like 'Name', 'Email', 'Phone', 'Address', 'City', 'State', 'Zip', 'Country', 'Date', and 'Time'. The data is organized into a structured table format, with each row representing a record. The tablet is tilted, and the grid is shown in a perspective view.

Name	Email	Phone	Address	City	State	Zip	Country	Date	Time
John Doe	john.doe@example.com	(123) 456-7890	123 Main St	New York	NY	10001	USA	2023-10-27	10:30
Jane Smith	jane.smith@example.com	(987) 654-3210	456 Elm St	Los Angeles	CA	90001	USA	2023-10-27	11:45
Bob Johnson	bob.johnson@example.com	(555) 111-2222	789 Oak St	Chicago	IL	60601	USA	2023-10-27	12:00
Alice Brown	alice.brown@example.com	(444) 333-4444	101 Pine St	San Francisco	CA	94101	USA	2023-10-27	13:15
Charlie Davis	charlie.davis@example.com	(222) 555-6666	202 Birch St	Phoenix	AZ	85001	USA	2023-10-27	14:30
Diana Prince	diana.prince@example.com	(888) 777-8888	303 Cedar St	Philadelphia	PA	19101	USA	2023-10-27	15:45
Frank Miller	frank.miller@example.com	(666) 999-0000	404 Maple St	San Diego	CA	92101	USA	2023-10-27	16:00
Grace Kim	grace.kim@example.com	(333) 111-2222	505 Walnut St	Portland	OR	97201	USA	2023-10-27	17:15
Henry Lee	henry.lee@example.com	(111) 222-3333	606 Cherry St	San Jose	CA	95101	USA	2023-10-27	18:30
Ivy Chen	ivy.chen@example.com	(999) 444-5555	707 Elm St	San Francisco	CA	94101	USA	2023-10-27	19:45
Jack White	jack.white@example.com	(777) 666-7777	808 Oak St	San Francisco	CA	94101	USA	2023-10-27	20:00
Karen Green	karen.green@example.com	(555) 888-9999	909 Pine St	San Francisco	CA	94101	USA	2023-10-27	21:15
Leo Black	leo.black@example.com	(444) 000-1111	1010 Maple St	San Francisco	CA	94101	USA	2023-10-27	22:30
Mia Grey	mia.grey@example.com	(333) 222-3333	1111 Walnut St	San Francisco	CA	94101	USA	2023-10-27	23:45
Noah Blue	noah.blue@example.com	(222) 444-5555	1212 Cherry St	San Francisco	CA	94101	USA	2023-10-27	00:00
Olivia Red	olivia.red@example.com	(111) 666-7777	1313 Elm St	San Francisco	CA	94101	USA	2023-10-27	01:15
Peter Yellow	peter.yellow@example.com	(999) 888-9999	1414 Oak St	San Francisco	CA	94101	USA	2023-10-27	02:30
Quinn Purple	quinn.purple@example.com	(888) 000-1111	1515 Pine St	San Francisco	CA	94101	USA	2023-10-27	03:45
Rachel Silver	rachel.silver@example.com	(777) 222-3333	1616 Walnut St	San Francisco	CA	94101	USA	2023-10-27	04:00
Sam Gold	sam.gold@example.com	(666) 444-5555	1717 Cherry St	San Francisco	CA	94101	USA	2023-10-27	05:15
Tina Bronze	tina.bronze@example.com	(555) 666-7777	1818 Elm St	San Francisco	CA	94101	USA	2023-10-27	06:30
Uma Copper	uma.copper@example.com	(444) 888-9999	1919 Oak St	San Francisco	CA	94101	USA	2023-10-27	07:45
Victor Iron	victor.iron@example.com	(333) 000-1111	2020 Pine St	San Francisco	CA	94101	USA	2023-10-27	08:00
Wendy Steel	wendy.steel@example.com	(222) 222-3333	2121 Walnut St	San Francisco	CA	94101	USA	2023-10-27	09:15
Xavier Tin	xavier.tin@example.com	(111) 444-5555	2222 Cherry St	San Francisco	CA	94101	USA	2023-10-27	10:30
Yara Lead	yara.lead@example.com	(999) 666-7777	2323 Elm St	San Francisco	CA	94101	USA	2023-10-27	11:45
Zoe Nickel	zoe.nickel@example.com	(888) 888-9999	2424 Oak St	San Francisco	CA	94101	USA	2023-10-27	12:00

Quick Search – for the Who

Records

0 SELECTED

ALL

PAGE

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	SERVICE LEVEL	ADVISOR 1	AUM	FIRST NAME PERSON 1	FIRST NAME PERSON 2	DATE
+	<input type="checkbox"/>	51 Anthropologie	(555) 666-4444	pres@anthropologie.com		Tricia Cameron	\$0.00	Gina		
+	<input type="checkbox"/>	ABC 401k Plan	(432) 555-4545 x	jjones@abc401kplan.com		John Henry	\$0.00	Julie		
+	<input type="checkbox"/>	Andrews - George & Sally	(555) 555-0000	Home@home.net	Platinum	Tricia Cameron	\$13,614,954.66	George	Sally	
+	<input type="checkbox"/>	Andrews - Jeff	(555) 555-4321 x	JeffAndrews@email.com		John Henry	\$0.00	Jeff		2/14/2022
+	<input type="checkbox"/>	Andrews Family Trust	(555) 555-5555			Tricia Cameron	\$0.00	Andrews		1/19/2022
+	<input type="checkbox"/>	Atherton - Clark and Elise	(620) 422-2230	iraisecows@email.net		Tricia Cameron	\$0.00	Clark	Elise	2/24/2022
+	<input type="checkbox"/>	Austin - Geoff and Sarah	919-555-1212	Geoff@Austinfirmllc.net		John Henry	\$0.00	Geoff	Sarah	2/24/2022

2022 RMD P2

OVER 50

QUICK SEARCH

ADVANCED SEARCH

Quick Search – for the Who

×

Quick Search

Load Saved Search:

--

▼

Save this Search:

✓

SAVE THIS SEARCH

DELETE SAVED SEARCH

AND

Classifications:

☐ Center of Influence

☐ Client

☐ Client-Child

☐ Deceased Record

☐ Divorced Record

Interests:

☐ Animals

☐ Baking

☐ Baseball

☐ Basketball

☐ Camping

Tags:

☐ 401k

☐ ABC Event - Attended

☐ Accumulation Phase

☐ Annual Gifting

☐ Annuitization

APPLY RESULTS

OR

Advanced Search – for the Who

Records

0 SELECTED

ALL

PAGE

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.

Q |

2022 RMD P2

OVER 50

QUICK SEARCH

ADVANCED SEARCH

		RECORD NAME ^	PHONE PRIMARY RECORD	EMAIL RECORD	SERVICE LEVEL	ADVISOR 1	AUM	FIRST NAME PERSON 1	FIRST NAME PERSON 2	DATE
+	<input type="checkbox"/>	51 Anthropologie	(555) 666-4444	pres@anthropologie.com		Tricia Cameron	\$0.00	Gina		
+	<input type="checkbox"/>	ABC 401k Plan	(432) 555-4545 x	jjones@abc401kplan.com		John Henry	\$0.00	Julie		
+	<input type="checkbox"/>	Andrews - George & Sally	(555) 555-0000	Home@home.net	Platinum	Tricia Cameron	\$13,614,954.66	George	Sally	
+	<input type="checkbox"/>	Andrews - Jeff	(555) 555-4321 x	JeffAndrews@email.com		John Henry	\$0.00	Jeff		2/14/2022
+	<input type="checkbox"/>	Andrews Family Trust	(555) 555-5555			Tricia Cameron	\$0.00	Andrews		1/19/2022
+	<input type="checkbox"/>	Atherton - Clark and Elise	(620) 422-2230	iraisecows@email.net		Tricia Cameron	\$0.00	Clark	Elise	2/24/2022
+	<input type="checkbox"/>	Austin - Geoff and Sarah	919-555-1212	Geoff@Austinfirmllc.net		John Henry	\$0.00	Geoff	Sarah	2/24/2022
+	<input type="checkbox"/>	Baker - Tom & Susan	612-555-5555	TomBaker@email.com		John Henry	\$0.00	Tom	Susan	1/19/2022

Advanced Search – for the Who

Advanced Search

Select Existing Search or

+ CREATE NEW SEARCH

×

Drag a column header and drop it here to group by that column

×

NAME

CATEGORY

SEARCH TYPE

Over 50

Tric

My a

2022

2022

TC-A1

Client

Trade Errors

Non-Discretionary Clients

Ex- Clients

Accounts

Compliance

Compliance

Compliance

Actions

Actions

Record

Record

4/5/2021

3/23/2021

3/16/2021

3/16/2021

3/16/2021

4/5/2021

3/23/2021

3/16/2021

3/16/2021

3/16/2021

Cameron,

Cameron,

Cameron,

Cameron,

Cameron,

Select the type of search you are wanting to build:

☒ Records

☐ Actions

☐ Assets & Liabilities

☐ Opportunities

☐ Insurance

← BACK

NEXT →

CANCEL

×

1

2

3

>

>|

1 - 10 of 27

10

EDIT SEARCH

✓ APPLY

CANCEL

Where will my information be displayed?

Advanced Search – for the Who

Choose Criteria Clear All Criteria ×

Logical Operator: AND OR

Content area cards

Actions

Assets & Liabilities

Insurance

Opportunities

Record

← BACK

CANCEL ✓ APPLY ✓ SAVE & APPLY

Advanced Search – for the Who

Choose Criteria Clear All Criteria ×

Logical Operator: AND OR

Record

- Address State Person1
- Address State Person2
- Address State Record
- Advisor 1
- Advisor 2
- Classifications
- Compliance
- Created By

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

← BACK CANCEL ✓ APPLY ✓ SAVE & APPLY

Advanced Search – for the Who

Display for fields that contain a [list](#) of items

Classifications

The screenshot shows the 'Classifications' field in the 'Who' section of the Advanced Search interface. A red box highlights the 'Logical Operator' section, which includes 'AND', 'OR', and 'NOT' buttons. The 'Classifications' field is a list box containing the following items: Center of Influence, Client, Client-Child, Divorced Record, Email, Employee, Entity, and Ex-Client. The 'ADD >' button is highlighted in yellow. The 'ADD ALL >>' button is also visible. The 'REMOVE ALL <<' button is visible. The 'REMOVE <' button is visible. The 'CLOSE' button is visible. The 'SAVE CHANGES' button is visible.

Advanced Search – for the Who

Display for fields that are [single data points](#)

Record - Record Fields

Logical Operator:

AND

OR

+ ADD CRITERIA

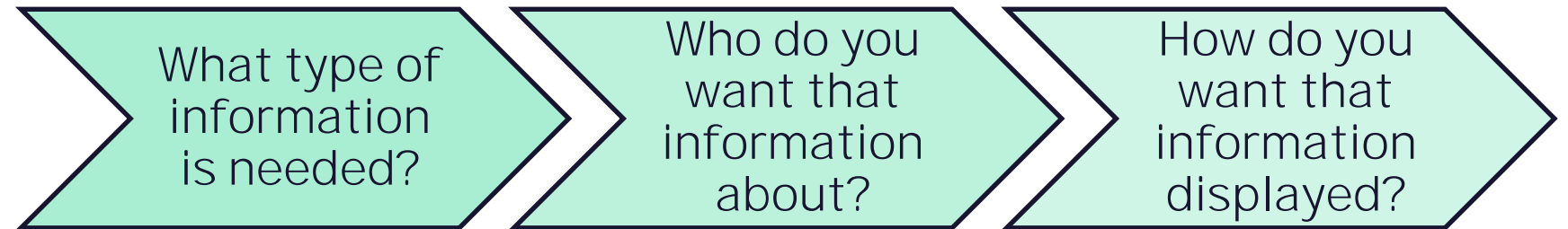
Account Review Note

Equal

X CLOSE

✓ SAVE CHANGES

Where the **Who** and the **What** come together



Report Assistant



Last 20 Records

Last 20 Actions

Records

Prospects

Actions

Opportunities

Assets

Insurance

Dashboards

Report Assistant

Email Mgmt

Correspond

Calendar

Documents

Workflow

Integrations

Settings

Import

Actions

5 My Past Due and Due Today Actions

6 My Pending Actions

Last 20 Actions

Opportunities

5 Open Opportunities

8 My Opportunities

Last 20 Opportunities

Records

Last 20 Records

Dashboards

ORION

Report Assistant

Correspond

Multi-record Emails

Correspondence History

Document Workspace

Document Templates

Workflow Monitor

Workflow Setup

Report Assistant

Report Assistant

Select the area you would like to report on

I would like to report on:

- ☐ Actions
- ☐ Assets
- ☐ Insurance
- ☐ Opportunities
- ☐ Records

Report Assistant

Select a saved Report or build a new report

- ☒ Saved report
- ☐ Build new report

Categories

All
Client Service
Compliance
Firm Related
Portfolio/Trading
Reporting

Saved Report

Clients with Advisor
Records with phone
numbers

Report Assistant

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

Client List



[Edit Selected Advanced Search](#)



< BACK

NEXT >

Report Assistant

Report Assistant

Select the Report Format

☐ Portrait (up to 6 fields) ☐ Landscape (up to 8 fields) ☒ Export to Excel (unlimited fields)

Select the Fields to include in your report

Filter

Address Line 1 Person 1

Address Line 1 Person 2

Address Line 2 Person 1

Address Line 2 Person 2

Address Line 3 Person 1

Address Line 3 Person 2

Address Mail Add Person 1

Address Mail Add Person 2

Address Preferred Mailing Name Person1

Address Preferred Mailing Name Person2

Address State Person 1

Address State Person 2

Address Zip Person 1

Address Zip Person 2

Birthday List Person 1

Birthday List Person 2

CSR

ADD >

ADD ALL >>

<< REMOVE

ALL

< REMOVE

Filter

Record Name

Advisor 1

Phone Primary Record

Email Record

Date Became Client

AUM

Move Up

Move Down

WHAT

< BACK NEXT >

Report Assistant

Report Assistant

Here are your results



RECORD NAME

ABC 401k Plan
Andrews - George & Sally
Andrews Family Trust
Atherton - Clark and Elise
Austin - Geoff and Sarah
Beck - Gwendolyn
Bennett/Edgerley - Clayton and Ophelia
Benson - Olivia
Brown - Charles
Campbell/Sutton - Steven and Sophia

1 2 3 4 5 6 >

Report Category Client Service

Prepared on Friday, February 25, 2022
Cameron Wealth Management

Clients by DBC



Record Name	Advisor 1	Phone Primary Record	Email Record	Date Became Client	AUM
ABC 401k Plan	John Henry	(432) 555-4545 x	jones@abc401kplan.com	9/1/1995	\$ 0.00
Andrews - George & Sally	Tricia Cameron	(555) 555-0000	Home@home.net		\$13,614,954.66
Andrews Family Trust	Tricia Cameron	(555) 555-5555	iraisecows@email.net	10/2/2020	\$ 0.00
Atherton - Clark and Elise	Tricia Cameron	(620) 422-2230	Geoff@Austinfirmilc.net	2/11/1982	\$ 0.00
Austin - Geoff and Sarah	John Henry	919-555-1212	foodislife@net.net	9/24/2020	\$ 0.00
Beck - Gwendolyn	Tricia Cameron	(934) 224-4466	eatbythewater@bennetts.com	10/1/2020	\$732,000.00
Bennett/Edgerley - Clayton and Ophelia	John Henry	(843) 477-7788			

GENERATE AS PDF REPORT



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SAVE

BACK

Prebuilt Reports

Records

0 SELECTED ALL PAGE 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

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+	<input type="checkbox"/>	ABC 401k Plan	(432) 555-4545 x	jjones@abc401kplan.com		John Henry	\$0.00	Julie		
+	<input type="checkbox"/>	Andrews - George & Sally	(555) 555-0000	Home@home.net	Platinum	Tricia Cameron	\$13,614,954.66	George	Sally	
+	<input type="checkbox"/>	Andrews - Jeff	(555) 555-4321 x	JeffAndrews@email.com		John Henry	\$0.00	Jeff		
+	<input type="checkbox"/>	Andrews Family Trust	(555) 555-5555			Tricia Cameron	\$0.00	Andrews		
+	<input type="checkbox"/>	Atherton - Clark and Elise	(620) 422-2230	iraisecows@email.net		Tricia Cameron	\$0.00	Clark	Elise	
+	<input type="checkbox"/>	Austin - Geoff and Sarah	919-555-1212	Geoff@Austinfirmllc.net		John Henry	\$0.00	Geoff	Sarah	
+	<input type="checkbox"/>	Austin Tools Company Inc	310-656-5656	Info@Austintoolscoinc.com		John Henry	\$0.00	Geoff		4/12/2021

Add Action

Email

Documents

Reports

Add Record

Tools

Meeting Monitor

Report Assistant

Report Builder BETA

Service Monitor

Data Maintenance

Time Reports

Beneficiary

Birthday List

Contact Information

Email Address

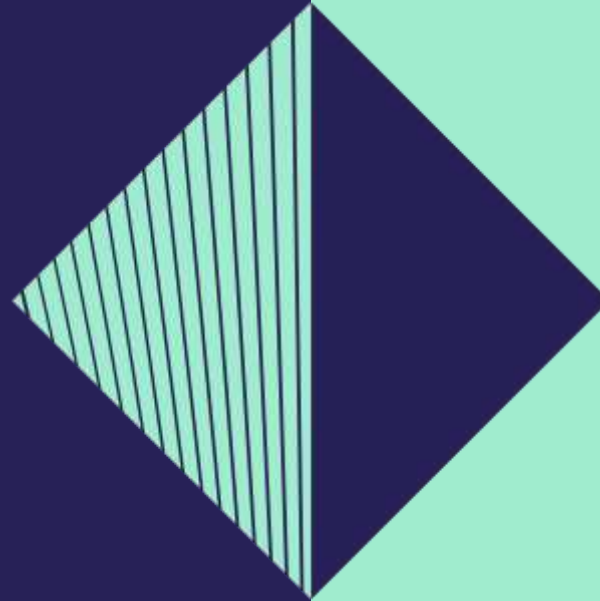
Last Contact

Phone Number

Referral

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Thank You for
watching



Questions can be addressed to
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