

How To: Create a New Account View

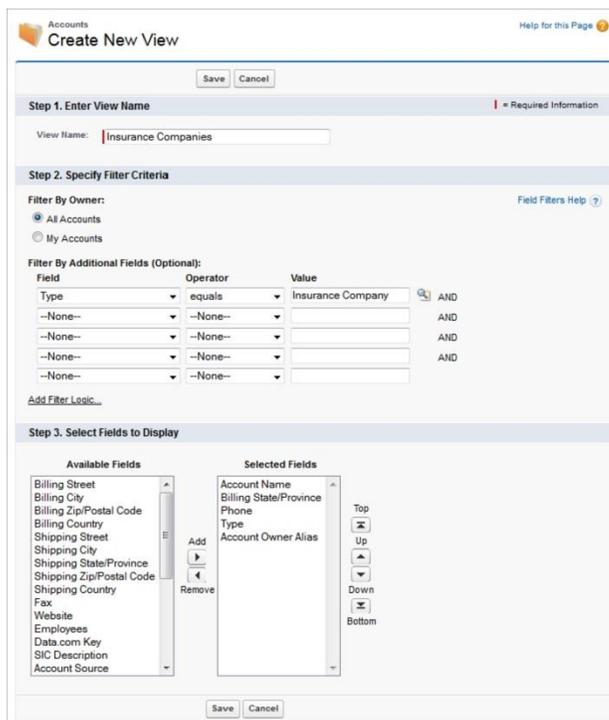
This tutorial will demonstrate how to create and save a custom filtered view in accounts.



 Custom contact views can be created for contacts, accounts and employees; however, this tutorial will demonstrate how to create a new account view for Insurance Companies.

Create a New Account View:

1. Log in to Assured JobCheck as any user.
2. Click on *Accounts* from the primary navigation bar.
3. Click “*Create New View*”.
4. Enter view name (i.e. Insurance Companies).
5. Specify filter criteria (i.e. Type equals Insurance Company).
Use the Magnifying glass to search filter values – this will present a list of values to choose from.
6. Select fields to display (i.e. Account name, billing state/province, phone, type, account owner).
7. Click “*Save*”.



Accounts Help for this Page

Create New View

Save Cancel

Step 1. Enter View Name Required Information

View Name:

Step 2. Specify Filter Criteria Field Filters Help

Filter By Owner:

All Accounts My Accounts

Filter By Additional Fields (Optional):

Field	Operator	Value	
Type	equals	Insurance Company	AND
--None--	--None--		AND

Add Filter Logic...

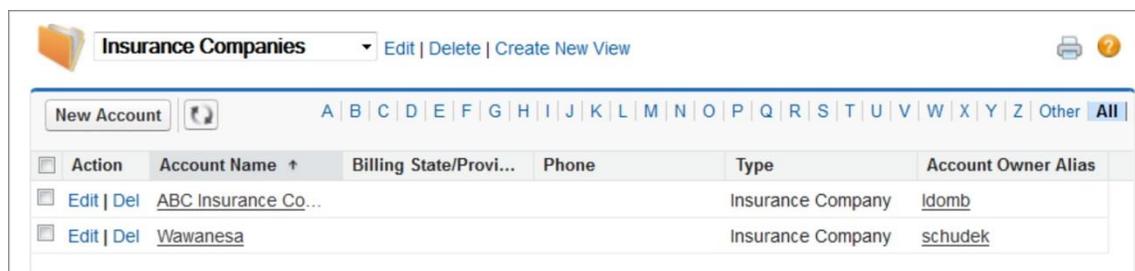
Step 3. Select Fields to Display

Available Fields	Selected Fields
Billing Street	Account Name
Billing City	Billing State/Province
Billing Zip/Postal Code	Phone
Billing Country	Type
Shipping Street	Account Owner Alias
Shipping City	
Shipping State/Province	
Shipping Zip/Postal Code	
Shipping Country	
Fax	
Website	
Employees	
Data.com Key	
SIC Description	
Account Source	

Save Cancel

Admin - Customization Tutorial

You will now have a new view called 'Insurance Companies' available in the account view dropdown menu. Follow the above steps to create multiple new views to filter your accounts



<input type="checkbox"/>	Action	Account Name ↑	Billing State/Provi...	Phone	Type	Account Owner Alias
<input type="checkbox"/>	Edit Del	ABC Insurance Co...			Insurance Company	ldomb
<input type="checkbox"/>	Edit Del	Wawanesa			Insurance Company	schudek

Create a New View for Contacts and Employees

The process outlined above for accounts also applies when creating new views in contacts and employees. Simply be conscientious that you will want to apply different filtering criteria and that all filtering criteria will not be the same for all contact types.

Useful Views to Consider:

- Active Users (under Employee).
- Account Types (under Accounts: insurance company, sub-trade, etc.).
- Contact Types (under Contacts: insurance adjusters, sub-trade contacts).