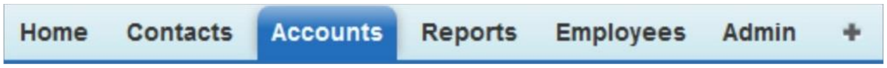
How To: Create a New Account View

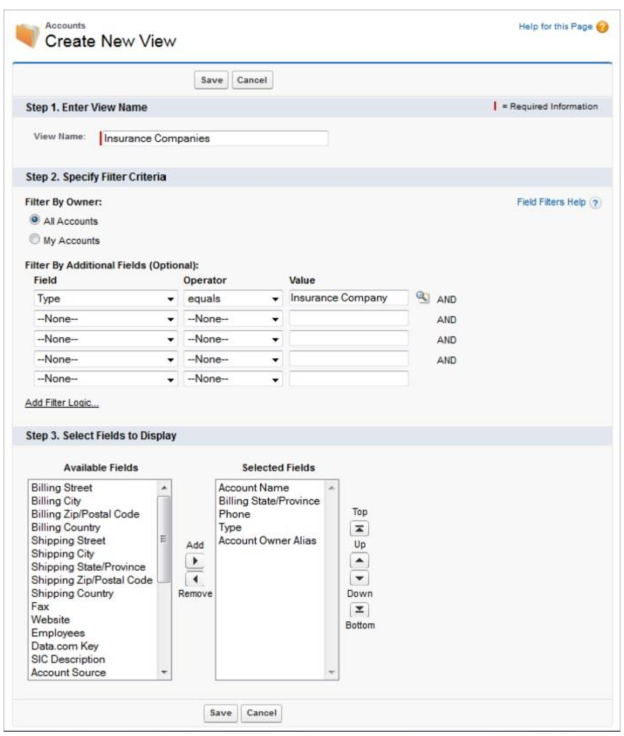
This tutorial will demonstrate how to create and save a custom filtered view in accounts.



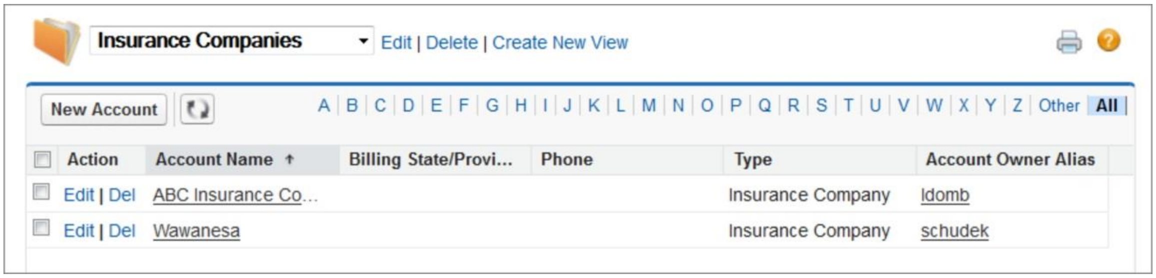
Custom contact views can be created for contacts, accounts and employees; however, this tutorial will demonstrate how to create a new account view for Insurance Companies.

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"*.



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



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).