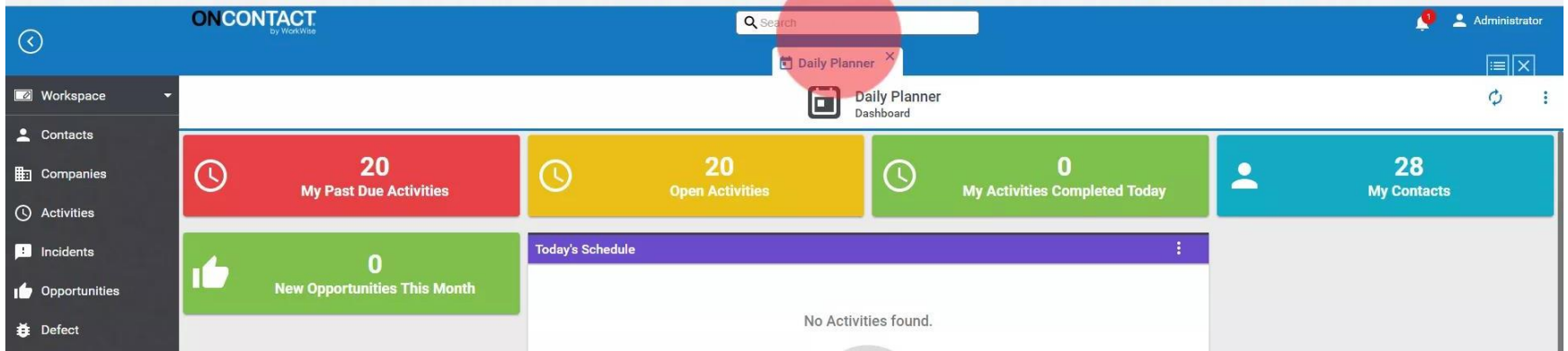
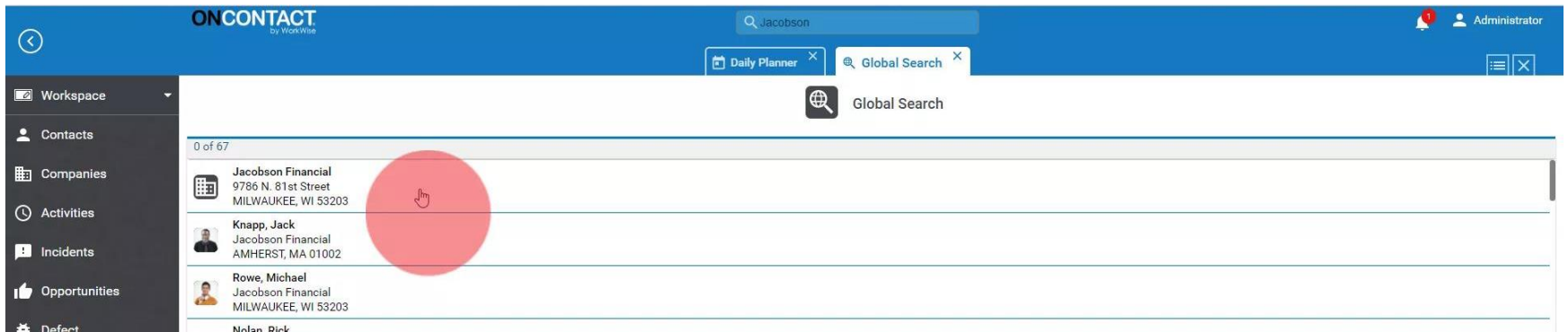


# USING GLOBAL QUICK SEARCH

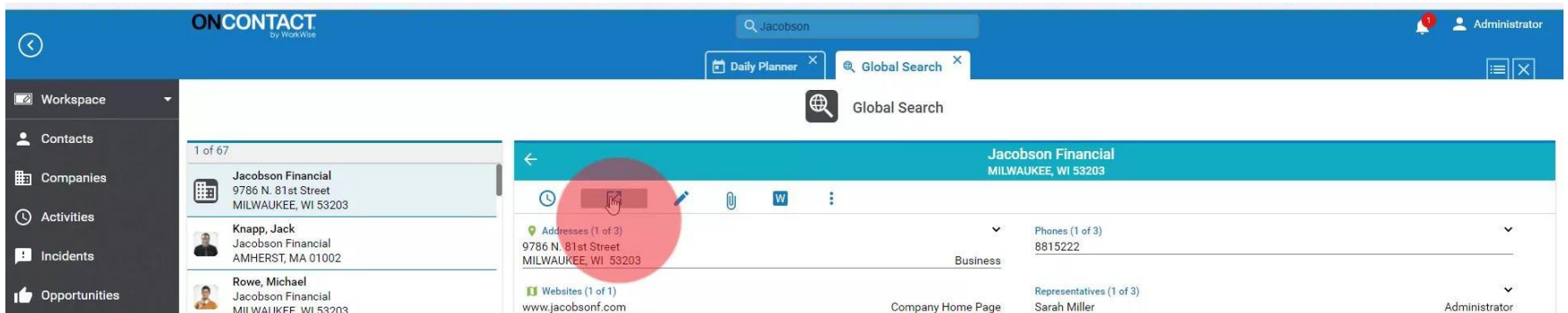
1. Enter your search criteria-search results will auto-populate as you type.



2. Click to select the record you want to open.



3. Click the Open icon.



#### 4. Your record is now available for your use.

The screenshot displays the ONCONTACT CRM interface. At the top, there is a navigation bar with the ONCONTACT logo, a search bar containing 'Jacobson', and a user profile for 'Administrator'. Below the navigation bar, a sidebar on the left lists various modules: Workspace, Contacts, Companies, Activities, Incidents, Opportunities, Defect, New, Dashboards, Recents, and Favorites. The main content area is titled 'Jacobson Financial Company' and features a 'Company Details' tab. This tab is divided into two sections: 'Details' and 'Summary'. The 'Details' section is further divided into four columns: Addresses (1 of 3), Phones (1 of 3), Web Addresses (1 of 1), and Preferred Contact Method. The 'Summary' section contains four large, colorful buttons representing key metrics: 3 Active Opportunities (green), 2 Open Incidents (blue), 4 To Do's (orange), and \$0.00 Month To Date Sales (yellow). On the right side of the interface, there are two panels: 'Contacts' and 'Recent Activity'. The 'Contacts' panel lists five individuals with their roles and settings icons: Debbie Sable (Customer Service Manager), Heather Berry (Marketing Coordinator), Jack Knapp (CFO), Michael Rowe (Vice President of Sales), and Rick Nolan (President). The 'Recent Activity' panel shows three recent events: an electronic mail on February 10, 2017, and two inbound telephone calls on February 9, 2017.

**ONCONTACT**  
by WorkVivo

Search: Jacobson

Administrator

Daily Planner | Global Search | Jacobson Financial

Jacobson Financial Company

Company Details | To Do's | Profile | More...

### Details

Addresses (1 of 3) 9786 N. 81st Street MILWAUKEE, WI 53203 Business	Type Active Customer
Phones (1 of 3) 1 (414) 881-5222 Business Main	Status Active
Web Addresses (1 of 1) www.jacobsonf.com Company Home Page	Profile Financial Services
Preferred Contact Method (no value)	Representatives (1 of 3) Sarah Miller Administrator
	Territories (1 of 1) Midwest

### Summary

- 3 Active Opportunities
- 2 Open Incidents
- 4 To Do's
- \$0.00 Month To Date Sales

### Contacts

- Debbie Sable - Customer Service Manager
- Heather Berry - Marketing Coordinator
- Jack Knapp - CFO
- Michael Rowe - Vice President of Sales
- Rick Nolan - President

### Recent Activity

- February 10, 2017 7:59am Electronic Mail  
Sable, Debbie - Jacobson Financial  
Assigned to Brian Jones
- February 9, 2017 11:10am Inbound Telephone Call  
Sable, Debbie - Jacobson Financial  
Assigned to Brian Jones
- February 9, 2017 4:07am Inbound Telephone Call  
Berry, Heather - Jacobson Financial