

Advanced Account and Contact Search Workflow

The screenshot shows the Salesforce interface for the 'Advanced Account and Contact Search' workflow. At the top, there is a search bar with 'Search Salesforce' and a dropdown menu set to 'All'. Below the search bar, there are navigation tabs: 'Details', 'Email And Other Actions', 'Chat', 'Case Comments', and 'More'. The 'Email And Other Actions' tab is active, showing options like 'Email', 'Post', 'View360', 'New Event', 'Case Merge', and 'Send Chat Invite'. The main content area contains a search form with two input fields: '* Account Name' and 'Zip Code', both with placeholder text 'search Accounts..'. A 'Search' button is located to the right of the 'Zip Code' field. Below the search form, there is a table with columns: 'ACCOUNT ID', 'NAME', 'PHONE', 'BILLING ZIP CODE', 'BILLING STATE', and 'BILLING COUNTRY'. A 'Previous' button is on the left, 'Page 1 out of 6' is in the center, and a 'Next' button is on the right. Two red callout bubbles are present: one pointing to the '* Account Name' field with the text 'Account Name and Number', and another pointing to the 'NAME' column header with the text 'Contact Name'. An 'Update Account and Contact' button is also visible on the right side of the search form.

The screenshot shows the Salesforce interface displaying a list of search results. The interface includes a search bar with 'Search Salesforce' and a dropdown menu set to 'All'. Below the search bar, there are navigation tabs: 'Customer Care 2.0', 'Cases', 'Chann...', 'New A...', '05581...', and 'Con'. The main content area shows a table with columns: 'ACCOUNT ID', 'NAME', 'PHONE', 'BILLING ZIP CODE', 'BILLING STATE', and 'BILLING COUNTRY'. The table contains 15 rows of data. A red callout bubble is present with the text 'Sometimes 1000+ results - too many'. At the bottom of the table, there are navigation buttons: 'Previous', 'Page 1 out of 6', and 'Next'.

ACCOUNT ID	NAME	PHONE	BILLING ZIP CODE	BILLING STATE	BILLING COUNTRY
<input type="checkbox"/> 0013C00000CMSGKQA5	Test Rugby 8				US
<input type="checkbox"/> 0013C00000CMSH3QAP	Test Rugby 16				US
<input type="checkbox"/> 0013C00000CMSHSQA5	Test Rugby 20				US
<input type="checkbox"/> 0013C00000CMSFvQAP	Test Rugby 3				US
<input type="checkbox"/> 0013C00000CMSHmQAP	Test Rugby 24				US
<input type="checkbox"/> 0013C00000CMSHwQAP	Test Rugby 26				US
<input type="checkbox"/> 0013C00000C7EkNQAV	testsurvey2		1015		US
<input type="checkbox"/> 0013C00000C7FKBQA3	testsurvey4		1017		US
<input type="checkbox"/> 0013C00000CMSAIQAP	testsurvey103				US
<input type="checkbox"/> 0013C00000CMSBAQA5	testsurvey108				US
<input type="checkbox"/> 0013C00000CMSBtQAP	testsurvey117				US
<input type="checkbox"/> 0013C00000CMSC3QAP	testsurvey119				US
<input type="checkbox"/> 0013C00000CMSEQA5	Test Shalom 25				US

Customer Care 2.0 | Cases | Search Salesforce

Advanced Account Search

Account Name: test | Zip Code: 1018 | Search

Update Account and Contact

Total Records: 1/1

ACCOUNT ID	NAME	PHONE	BILLING ZIP CODE	BILLING STATE	BILLING COUNTRY
0013C00000C7FKGQA3	testsurvey5		1018		US

Page 1 out of 1

Filter by zip code, eventually phone and city

Narrows to Single Result

Customer Care 2.0 | Cases

Case Owner: Mansimar Singh devservice | Case Record Type: Customer Care Cloud -Case Close

Case Number: 05581805 | SAP Document URL: https://teconnectivity.atlassian.net/browse/CC-296

Contact Name: amruth | GIBU: TEIS

Account Name: testsurvey5

Office: --None--

SAP Document Number: 1234

Is Email Send:

LinkExpiration:

Cancel | Save

Case Contact Updated (not developed, found better solution)

Case Account Updated