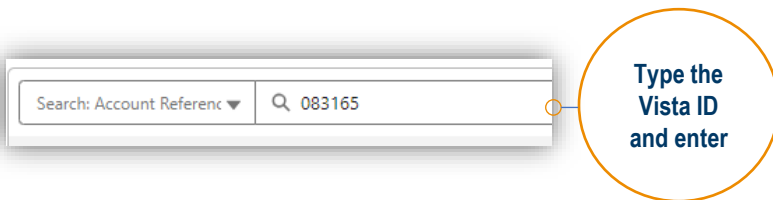


## How to search for the correct account in Salesforce

— You have the Vista ID number (or account name in Vista)

1. Click into the global search bar.
2. Select the filter **Account References**.
3. Type Vista ID and enter.



4. If the account exists in Salesforce the results will populate in the account references table. Click on the account name in the **account** column to open the account in Salesforce.

Account Reference Name = The account name in Vista

Display Name = The system containing the account reference number

Click on account name

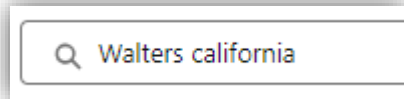
Account Reference Name	Display Name	Account	Source System ...	Sales Org	Distrib...
BP OIL CO ROCHELLE IL	VISTA01 083165 ( 0000 / 00 / 00 )	BP OIL CO ROCHELLE IL	083165	0000	00

Source System ID = Vista ID number

# Search for the correct account

— You have the account name and address

1. Click into the global search bar.
2. Type the account name and any part of the address that you have (e.g., street, city, state).



3. Look for accounts with matching addresses. Click **View More** on the accounts table to view all available records.



Account Name ↑	Status	Street	City	State/Province	Country	Owner First Name	Owner Last Name
WALTERS WHOLESale ELECTRIC 14	Active	1880 SPRUCE STREET	RIVERSIDE	California	United States	Field Service	Integration User
WALTERS WHOLESale USE 446071	Duplicate	PO Box 92589	LONG BEACH	California	United States	Field Service	Integration User
WALTERS WHOLESale 3	Active	1510 RITCHEY STREET	SANTA ANA	California	United States	Field Service	Integration User
WALTERS WHOLESale ELECTRIC 6	Active	11305 SOUTH HINDRY AVENUE	LOS ANGELES	California	United States	Field Service	Integration User
WALTERS WHOLESale	Active	255 DEINIGER CIR	CORONA	California	United States	Field Service	Integration User

4. You can sort the table view or use filters to narrow down the search.
5. Once you find the account, you can verify by checking the Vista ID number.

— Verify the account by checking the Vista ID number

1. Open the account in Salesforce.
2. Click on the **Account References** related list

Account References

## Search for the correct account

- Verify the account by checking the Vista ID number
- 3. If this account exists in Vista, you will see VISTA 01 as the **Source System** and the Vista ID number in the **Source System Reference ID** column.

The screenshot shows a Salesforce interface for 'Accounts > WALTERS WHLSE EL CO SANTA CLARITA' with the sub-section 'Account References'. It displays a table with 4 items, updated a minute ago. The table has columns for 'Account Reference Name', 'Related Account', 'Source System Reference ID', and 'Source System'. Two callout boxes with arrows point to the 'Source System Reference ID' and 'Source System' columns. The first and third rows are highlighted with yellow borders, showing '356589' in the 'Source System Reference ID' column and 'VISTA01' in the 'Source System' column.

	Account Reference Name	Related Account	Source System Reference ID	Source System
1	WALTERS WHLSE EL CO SANTA CLARITA	WALTERS WHLSE EL C...	356589	VISTA01
2	WALTERS WHLSE EL CO SANTA CLARITA	WALTERS WHLSE EL C...	1-87AQ3LX	SIEBEL_CRM
3	WALTERS WHLSE EL CO SANTA CLARITA	WALTERS WHLSE EL C...	356589	VISTA01
4	WALTERS WHLSE EL CO SANTA CLARITA	WALTERS WHLSE EL C...	1-GQ1H081	SIEBEL_CRM

- If you find duplicate accounts, please email to [SalesforceHelpES-AMER@Eaton.com](mailto:SalesforceHelpES-AMER@Eaton.com). We have a active project that is working to eliminate duplicate accounts in Salesforce.

# Search for the correct account

— Find an account in the Outlook plug-in.

First, we recommend if you are looking for an account for the first time to use the desktop application. Outlook has condensed screens, which can make this process a little tricky. Once you have found an account on the desktop version and clicked on it, Salesforce will bring that account to the top in future searches. This will make finding the account much quicker in Outlook.

Here's how to find an account when creating a new contact, opportunity, lead, or task in Outlook.

1. Type the account name along with any other keywords, such as city, state, and street.
2. If you don't see the account you are looking for or to see more information, click **the magnifying glass**.
3. Expand the window wider to see more columns. Sort the list alphabetically by account name, city, state, etc. The list is automatically sorted by **Relevance** which is based on your previous search history.
4. When you find the correct account, click on the **account name**.

**Type the account name**

**Use the magnifying glass to search**

**The list is automatically sorted by Relevance**

**Click on account name**

ACCOUNT NAME	STATUS	STREET	CITY
WESCO NASHVILLE TN TVA UTILITY 7861	Active	1410 FORT NEGLEY BLVD	NASH
WESCO DISTRIBUTION INC 7861	Active	1410 FORT NEGLEY BOULEVARD	NASH
WESCO DISTRIBUTION INC 3735	Active	1400 FORT NEGLEY BOULEVARD	NASH
WESCO DISTRIBUTION	Active	1400 FT NEGLEY BLVD	NASH
WESCO 7861	Active	1410 FORT NEGLEY BOULEVARD	NASH
WESCO 3735	Active	1400 FORT NEGLEY BOULEVARD	NASH