



Searching Records in Salesforce

Farmers.gov/Salesforce search methods changed with web transmittal 665.

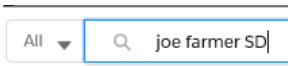
Quick Tips (more to come as time allows):

Using City, State, and/or Recording County to Narrow Name Searches:

You can add the city, state or recording county after a name to narrow the results.

Examples:

Add the state abbreviation:



Other options:

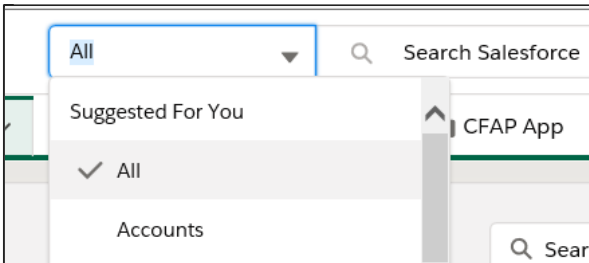
Joe Farmer Anywhere TX Coke - will prioritize records from Anywhere, TX that have Coke as their recording county.

Joe Farmer Coke (Recording County)

Joe Farmer Anywhere (City)

Hitting 'Enter' while in the search box or clicking on the grey item in the dropdown list will open the advanced search results page. Make sure you are looking at the CONTACT or ACCOUNT sections accordingly--see 'How to Choose...' tip below for more information!

You can narrow the results using the dropdown to select CONTACT or ACCOUNT as well.



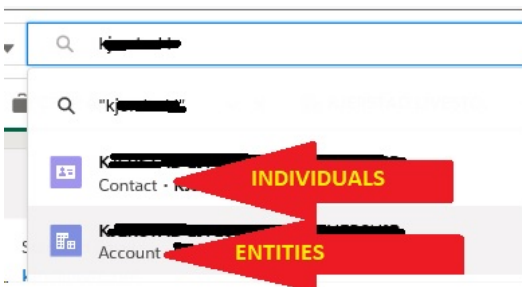
NOTE: Searching for 'Jim' will also bring up records with 'James' in the name fields.

You can also search for most any other text field, including their PHONE NUMBER or EMAIL ADDRESS.

How to choose the correct record type for adding a customer interaction:

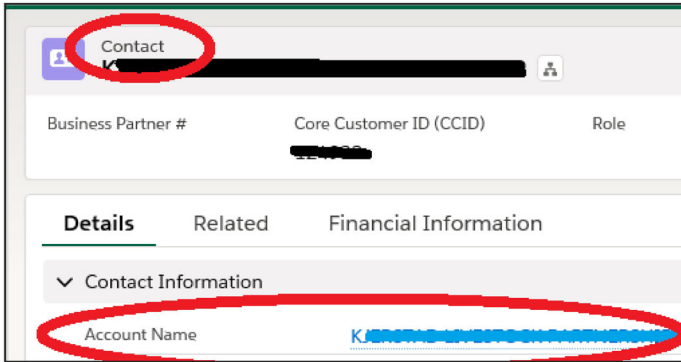
For an INDIVIDUAL, select the CONTACT record.

For and ENTITY, select the ACCOUNT record.

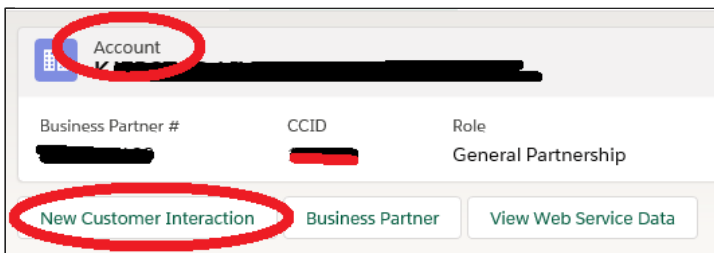


If you choose the CONTACT record for an entity by mistake, there will be no button to create an interaction.

In that case, click on the blue hyperlinked name of the entity to go to the ACCOUNT record.



This link will take you to the ACCOUNT record which shows the 'New Interaction' button.



SOURCE:

https://connections.usda.gov/wikis/home?lang=en-us#!/wiki/Wf88a6fad4a1a_4bf5_9c78_8fd47e121e61/page/Searching%20Records%20in%20Salesforce