

## **Title:** CRM Phase One Improvements: All Accounts in Global Search

**Platform:** CRM Desktop and Mobile

**Deployment Date:** 6/15/19

**What:** Global Search may result in EQAC, PDAC and Service, in addition to Merch. Be aware that other account types will be present, so you don't accidentally choose the wrong account type. Nothing will change. Continue working in Merch accounts. All functions and work flows will remain the same.

**Why:** The addition of EQAC, PDAC and Service information is phase one of CRM enhancements, part of a larger, ongoing enhancement project, which will: improve automation, self-service, organization and data integrity, while streamlining processes in CRM.

**Internal customers:** Sales, Strategic Markets, Contact Center, Business Development, Finance

### Before and After View of Possible Global Search Results

1. Perform a global search
2. Before deployment global search results only represent Merch accounts
3. After deployment global search results will represent EQAC, PDAC and Service, and Merch accounts

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Quick Glance Tutorial  
**CRM Global Search Results in All Accounts**

1. Perform a global search

2. Before deployment global search results only represent Merch

3. After deployment global search results will represent EQAC, PDAC and Service, and Merch