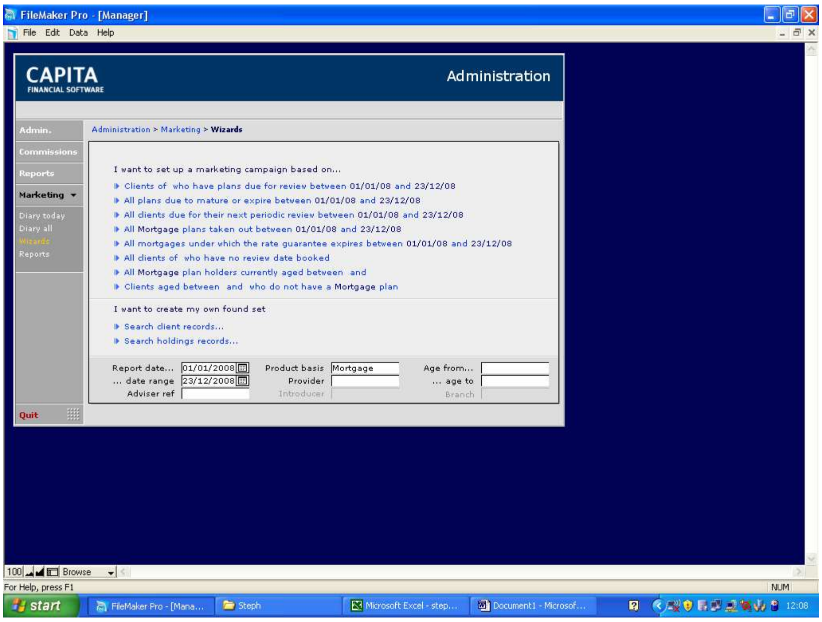
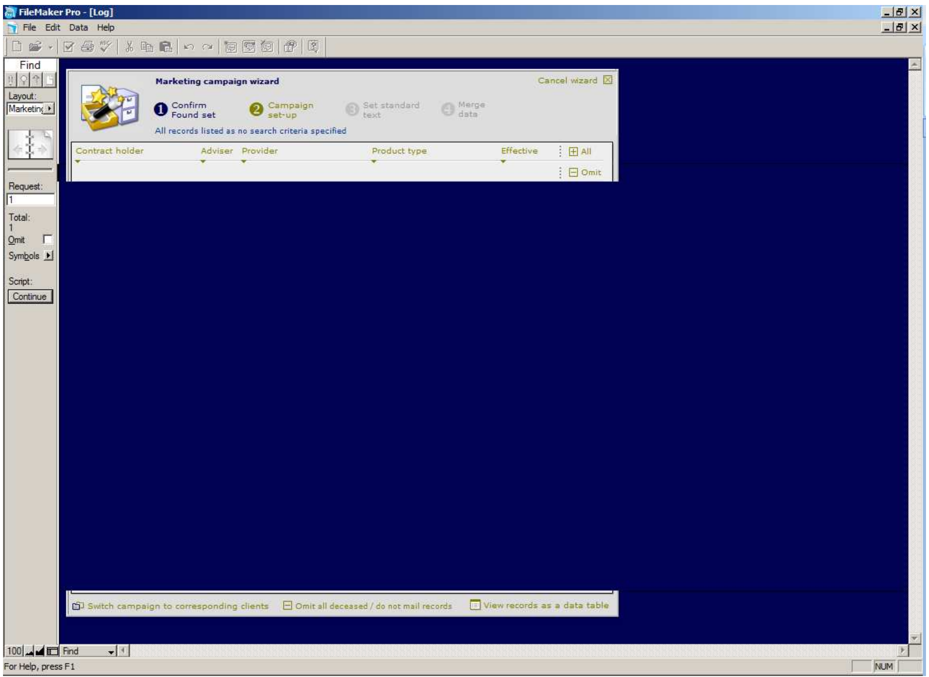
How to get a list of Clients and their Holdings by Adviser

Select Admin from the Front Screen and then Marketing>Wizards. Below the heading 'I want to create my own found set', select the hyperlink 'Search holdings records'.



This will start the 'Marketing campaign wizard' and will bring up a list of all records. Hold down the Ctrl + F key to create a new found set. This will clear all the fields and give you a blank canvas.

Then enter the adviser reference in the appropriate field and hit the enter/return key.



A list of Clients and related Holdings will be returned for the Adviser Reference entered. To create a marketing wizard campaign based on these Clients, continue through the remaining steps 2-4 at the top of the screen