

# accessCi Cheat Sheet

**Go to accessCi:** <http://accessci.hartehanksmi.com>

**Log in to accessCi:** Log in with your user ID and password

## Select the Database That You Would Like to Access:

To begin searching click on the link for the database that you want to access. Besides the Ci Technology Database several speciality database options may exist depending on your subscription. For example: Enterprise Database giving you a top-down view of companies linked to an enterprise parent company and PurchaseAlerts listing all recently updated sites that have indicated plans to purchase technology in the next 12 months.

## Get Into accessCi to Find Leads:

From the buttons displayed, choose the one that best describes how you want to search the database. The yellow buttons are short cuts that will walk you through building a search. The blue button, Traditional Site Search and Reports, is the most complete way to search and report on the database.

## Build Your Search Under Traditional Site and Reports

On the left side of the Site Search page, choose the categories you want to search. For example, if you want to search for sites within your geographic territory, click on "Site Geography" and choose the geographic description of your territory, for example "State." Then select your state and click on "Save This Selection" at the bottom of the page.

This criteria has now been added to your search summary on the right side of the page. As you add more criteria to your search (for example, "Technology Totals at Site", Total PC's or # of laptops at the site), your criteria will build in the search summary. The more criteria you add, the narrower your search will be, and the fewer sites you will get as a result. Searches may be saved.



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### **Get Results:**

After choosing your selection criteria, scroll to the bottom (or from the top) of the page and select one of the following reporting options: "Go Get" 1) list of matching sites; 2) list of contacts at matching sites; 3) summary reports of matching sites.

### **Reporting on Your Matching Sites:**

After selecting one of the reporting options you will see the sites that match your search. At this point, you can customize that list into a spreadsheet with information that is useful for you, and then export that list into Excel, or choose "download profiles" to download the full technology information available onto your hard drive. View profiles onscreen by clicking on a company name link, enterprise name, URL, or ticker symbol can also be links to additional company information.

### **Customizing Your Spreadsheet:**

To edit the list of matching sites to fit your needs, select one of the links directly above and to the right of the list. Select the "add or remove fields" link to customize the fields in your spreadsheet. In the "add or remove fields" area, select the fields that you want to be included in your report, then select "Accept Changes" at the bottom of the page. Choose the other customizing links at the top of the list to change the sort order of the columns and column sequence. Report formats can be saved.

### **Adding Contact Names:**

If you want to add contact names to create a telemarketing list, select the "Site Contact List" link at the top of the page, under the tabs. You can select which functional contacts you would like included in your list. To export this customized spreadsheet into Excel, click on the "Export List" link about the spreadsheet and follow the exporting instructions.

**For technical support call**

(800) 645-5795  
6 am - 5 pm PST

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