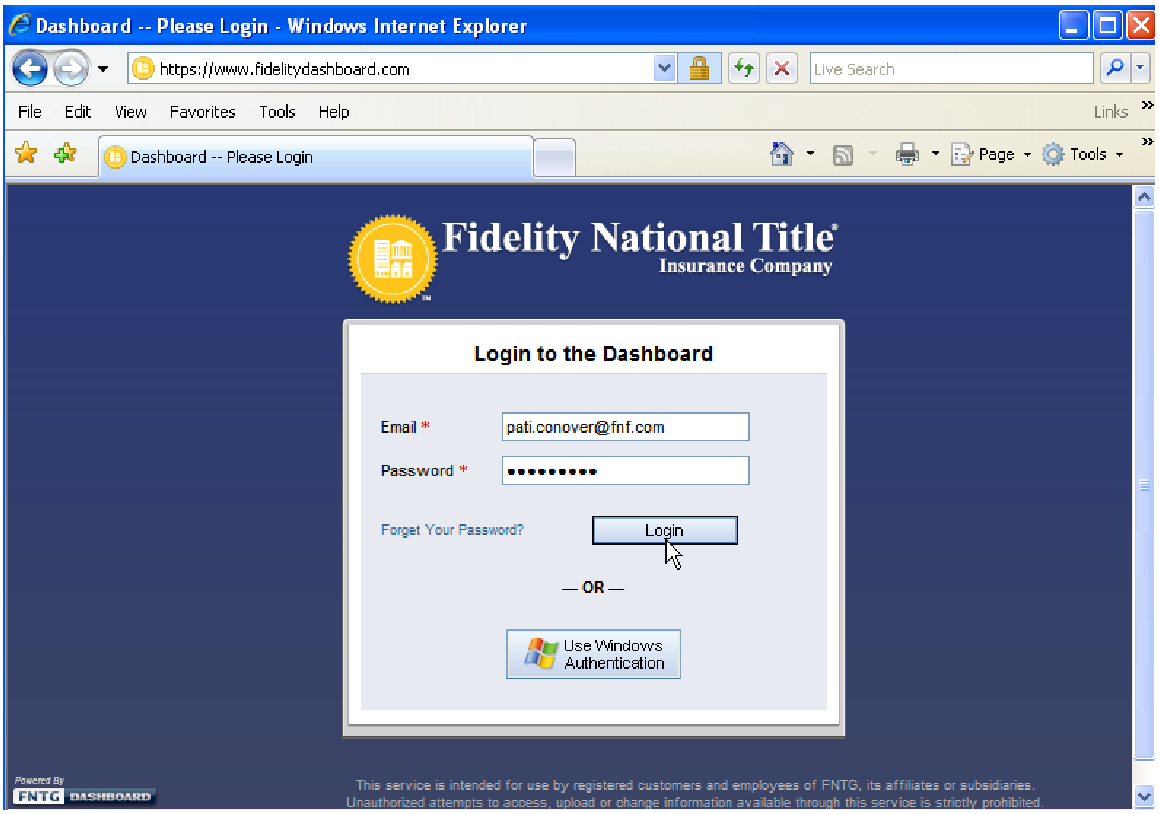
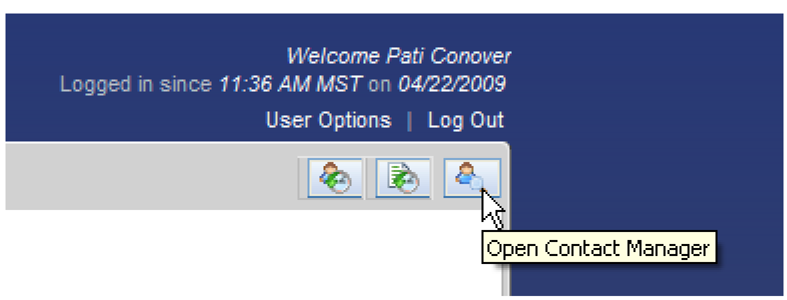
# Dashboard for Marketing Reps
## How to Search for Client Info

### *www.fidelitydashboard.com*

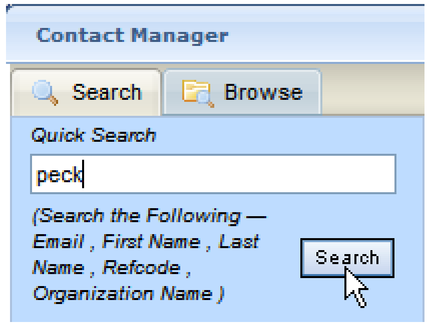
1. **Login to Dashboard using your Fidelity email address and your current email password (see below).**



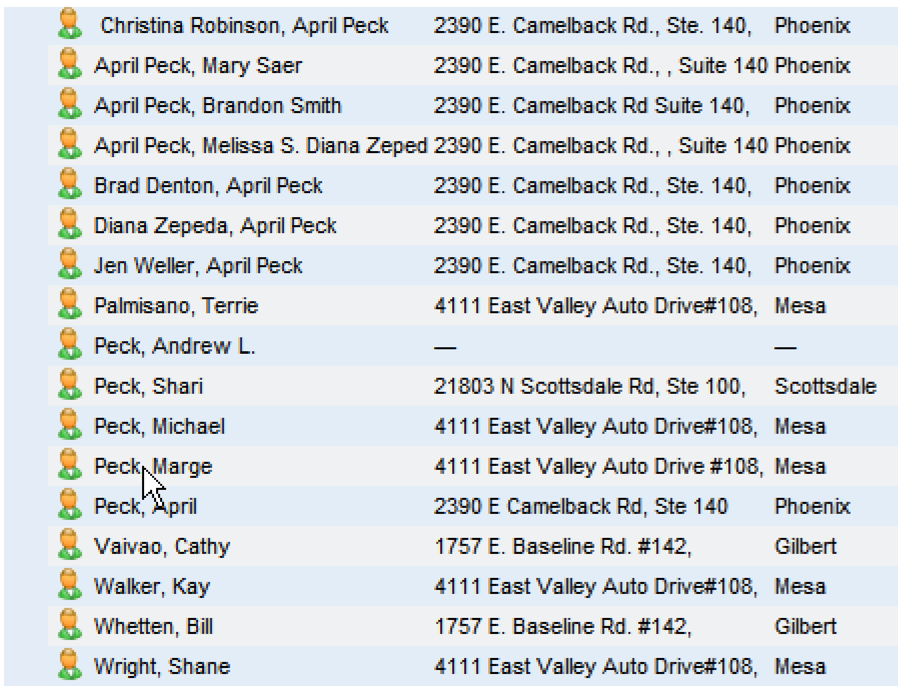

2. **Once in Dashboard, single click the *Open Contact Manager* icon in the upper right hand corner of the screen (see below).**



3. **To search for a contact, enter the contact's first name in the *Quick Search* field and single click the *Search* button (see below).**

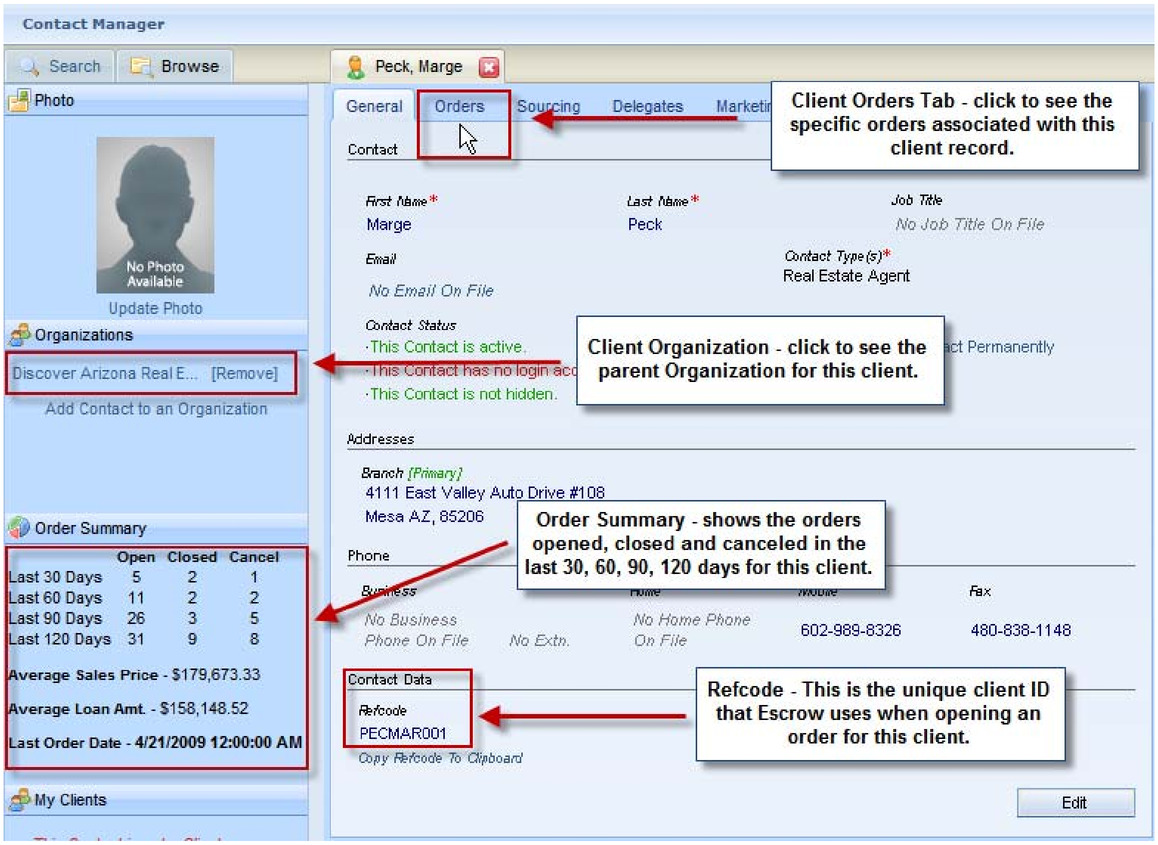



4. **This will bring up a list of contacts that meet the search criteria. Once you've found the correct contact, double click the contact name to bring up the details page (see below).**



| | | |
|---|---|---|
| Christina Robinson, April Peck | 2390 E. Camelback Rd., Ste. 140, | Phoenix |
| April Peck, Mary Saer | 2390 E. Camelback Rd., , Suite 140 | Phoenix |
| April Peck, Brandon Smith | 2390 E. Camelback Rd Suite 140, | Phoenix |
| April Peck, Melissa S. Diana Zeped | 2390 E. Camelback Rd., , Suite 140 | Phoenix |
| Brad Denton, April Peck | 2390 E. Camelback Rd., Ste. 140, | Phoenix |
| Diana Zepeda, April Peck | 2390 E. Camelback Rd., Ste. 140, | Phoenix |
| Jen Weller, April Peck | 2390 E. Camelback Rd., Ste. 140, | Phoenix |
| Palmisano, Terrie | 4111 East Valley Auto Drive#108, | Mesa |
| Peck, Andrew L. | — | — |
| Peck, Shari | 21803 N Scottsdale Rd, Ste 100, | Scottsdale |
| Peck, Michael | 4111 East Valley Auto Drive#108, | Mesa |
| Peck, Marge | 4111 East Valley Auto Drive #108, | Mesa |
| Peck, April | 2390 E Camelback Rd, Ste 140 | Phoenix |
| Vaivao, Cathy | 1757 E. Baseline Rd. #142, | Gilbert |
| Walker, Kay | 4111 East Valley Auto Drive#108, | Mesa |
| Whetten, Bill | 1757 E. Baseline Rd. #142, | Gilbert |
| Wright, Shane | 4111 East Valley Auto Drive#108, | Mesa |

5. **The contact record *General* tab shows specific detail on the contact, including contact information, order history and Softpro Refcode (see below).**



6. **Single click the *Orders* tab to see the orders associated with this contact. Use the filters listed below to show different order data.**