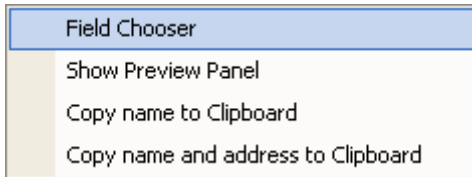


## Functionality within client search

Within the client **Search** page, you can bring in more fields to make working with your data easier.

1. Right-click on an active area in the grid and select **Field Chooser**.



The **Field Chooser** will appear.



All fields in the **Field Chooser** can be added to your **Search** window.

2. Select the field you wish to insert and drag to the position required.

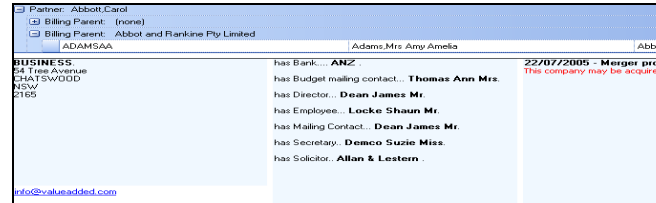
You can also **Group** that column by dragging it up to the location titled **Drag a column Header here to group by that field**.

You can build a series of grouping by adding extra fields to the same area.

## THE PREVIEW PANEL

From the client Search window:

1. Right-click in the active grid.
2. Select **Show Preview Panel** to get a snapshot view of the client you have highlighted.



From this window you can gather information about the client without having to open the client record. You can see the address, the email address and the associations for this client. Also information from a note appears to the right.

## Remove the Preview Panel

1. Right-click in the active grid.
2. Select **Hide Preview Panel** to remove.



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# ACCOUNTANTS OFFICE CLIENT SEARCHES

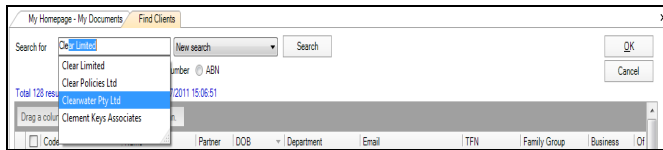
## Quick Reference Guide



## SEARCHING FOR CLIENTS

### Client Search area

1. Click on the **Contacts** icon.  
Your list of recently used clients appears.
2. The **Auto Complete** functionality allows you to start typing in the **Search** field with the list of available clients reducing with additional key strokes. For example, when searching for Clearwater Pty Ltd, typing in the first few characters of the client name CLE will result in an available list of clients from which to choose as follows:

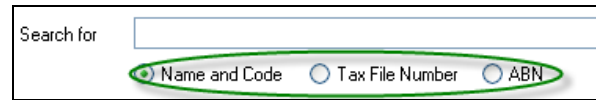


3. To search for a client's first, middle or alias name, key in the name and press **[Enter]**.

Note: The auto complete search ignores any filters that have already been applied to the search list window. For example, closed clients, filters for partner etc.

### SEARCH FOR TFN AND ABN OR IRD

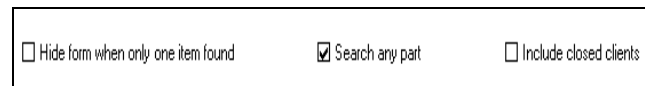
1. Click on **Contacts** icon.
2. Change the radio button to search for clients using their TFN or ABN or IRD.



3. You can either enter in the whole TFN/ABN or IRD number (no spaces) for the exact match, or part of the number which will pull up any client that matches those digits.

### SEARCH OPTIONS

Use the options at the bottom of the page to aid your search.



### Hide form when only one item found

If your search finds only one instance of the entry, the client's page will open immediately.

### Search any part of name or code

Will search for every instance of the characters supplied (ie. search on "cal" will produce:

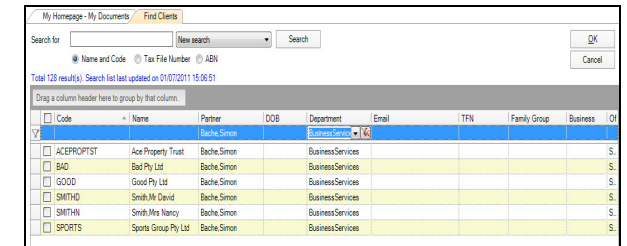
- Cal Jones
- Jenny Calabrisi
- Berry Technical

### Include closed clients

Will include closed clients in your search displayed with a line through the name and code.


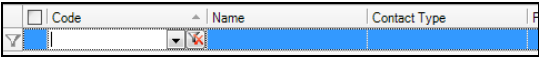

### ADVANCED FILTERING

You can apply a single or multiple filters to the **Find Clients** list. In the following example, a filter has been applied to both the Partner and Department fields:



Code	Name	Partner	DOB	Department	Email	TFN	Family Group	Business	Of
ACEPROPST	Ace Property Trust	Beche Simon		Business Services					S.
BAD	Bad Pty Ltd	Beche Simon		Business Services					S.
GOOD	Good Pty Ltd	Beche Simon		Business Services					S.
SMITHD	Smith M David	Beche Simon		Business Services					S.
SMITHI	Smith M Nancy	Beche Simon		Business Services					S.
SPORTS	Sports Group Pty Ltd	Beche Simon		Business Services					S.

### To filter columns

1. Click on a column in the **Filter** bar.  
The **Filter** bar is identified by the  in the left most column.  

2. Use the drop-down arrow to select from the list of values in the column. The list will now only show entries that match the value selected in the filter. You can use wildcards when entering filters:
  - To find all entries in the column beginning with D, enter **d\*** in the filter
  - To find all entries in the column containing the characters FAMILY, enter **\*family\*** in the filter
  - To find all entries ending in D, enter **\*d** in the filter.
3. Click  to remove the filter.

**Note:** You can also sort any of the columns by clicking on the column heading.