

How To Search Within Enquiries

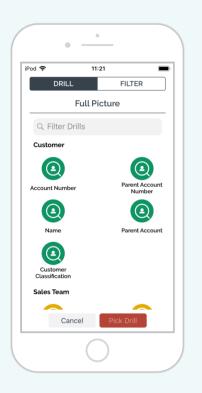
Apple iOS

Sometimes generating a report can yield hundreds of lines of data, if not thousands. You can use the Search feature to easily locate one customer name, product, or account number within the enquiry results.

01

Ensure you have selected the appropriate bubbles so the right data list is being displayed.

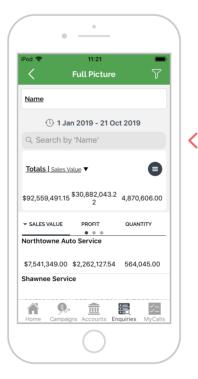
DRILL



02 GO TO SEARCH

The search bar, located directly below the date range, allows you to search for information within the bubble you have selected.

For instance, if you selected the Name bubble, the search bar will say Search by 'Name'.



. 03 SEARCH

Enter the information you want to locate. sales-i will begin filtering through the results after two or more characters have been entered and will display entries for any line containing those same characters.

Note: As sales-i searches through results, the totals at the top will adapt to reflect the sales from the filtered results.

Pod 🗢	11:24	
<	Full Picture	Y
Name		
Q Joe		8
Totals Quantit	lX ▲	•
\$9,502.83	\$3,501.27	390.00
SALES VALUE	PROFIT	▲ QUANTITY
loe Grimm For		
\$241.08	\$93.15	1.00
oe Staffords &	Sons Auto Bo	dy
\$4,127.54	\$1,504.75	131.00
A Sieme Eore	<u></u>	nquiries MyCalls



Add a space before a string of characters to indicate that the word or number is not the first word or number in the description or code.

For example, entering a space before the word "Auto" would display results such as "Bill's Auto Garage" and "Very Best Auto" and would exclude results like "Auto World" or "Auto Repair House".

(•	•	
	iPod 🗢	11:23 Full Picture	T
> (Name Sons		8
	Totals Sales \$68,753.97	<u>Value</u> ▼ \$22,963.40	2,273.00
	▼ SALES VALUE	PROFIT	QUANTITY
	Tony & Sons A		
	\$59,105.14	\$19,615.36	2,034.00
	Joe Staffords	& Sons Auto Bod	ly
	\$4,127.54	\$1,504.75	131.00
	A 9	utomotive Ctr In a igns Accounts En	
		\bigcirc	

05 SEARCH - A SPACE AFTER TEXT

Add a space after a string of characters to indicate that the word or number is the first word or number in the description or code.

For example, entering a space after the word "Lumber" would display results such as "Lumber Inc." and "Lumber Suppliers United" and would exclude results such as "Empire Lumber" or "Big Tex Lumber"

	iPod 🗢 11::	22 💻
	Full Pi	cture 🍸
	Name	
• (۲
	Totals Sales Value V	•
	\$12,019,350.42 \$3,703,	213.06 829,088.00
	▼ SALES VALUE PROF	IT QUANTITY
	Northtowne Auto Servic	ce
	\$7,541,349.00 \$2,262,	127.54 564,045.00
	Northtowne Auto Servio	ce Ship-To
	\$1,913,252.59 \$571,1	12.71 143,720.00
	Norris Auto Service	
	Home Campaigns Accord	

06 SEARCH - INSERT *

If you are unsure of how to spell the name, description, etc., you are trying to locate, use the asterisk (*) to replace the letters you are unsure of.

sales-i will display any line containing the letters in the order you've typed in, even if there are letters in between. For example, if you are unsure how to spell a customer's name (Roehrig), and you type in "R*rig", sales-i will display "Roehrig" in the results because it contains the letters you entered in the same order.

iPod 🗢	11:25 Full Picture	- 7
	Full Picture	Ų
Name		
Ex*utive		8
Totats Quanti	ty 🔺	
\$429,299.79	\$139,235.31	15,941.00
SALES VALUE	PROFIT	▲ QUANTITY
Clarion Execut		
\$52.37	\$12.12	1.00
Automated Exe	ecutive Taxes	
\$2,173.02	\$749.42	9.00
Executive Limo	usine Svc Inc	
Home Campai	gns Accounts En	quiries MyCalls
	\bigcirc	



Some special characters, such as commas, hyphens, and forward slashes are searchable.

This is especially helpful when searching for product descriptions containing special characters.

	•	•		
iPod 🗢	Fu	11:15 all Picture		一 了
Product	Group Le	evel 1		
	1 Jan 2	2019 - 21 00	ct 2019	
Q -))			8
Totals s	Sales Value	₽ ▼	(
\$9,875,66	63.06 \$3	3,331,494.10	319,269	.00
▼ SALES VA	LUE	PROFIT	QUANTITY	(
HVAC - H	eating, V	entilation, a	nd Air Con	dition
\$4,636,33	32.44 \$1	,597,682.27	119,945	.00
Transmiss	ion - Ma	nual, Clutch	1	
Home C	S ampaigns	Accounts Er	nquiries M	✓— ✓— yCalls
		\bigcirc		