

## Search for a CardFile.

## Who: All users, all sites.

Describe: Able to search through a list of CardFiles, using basic filtering.

Context: Used to confirm there are no duplicates, and that there is a cardfile to use for Jobs, Quotes and Purchases.

	e v 🕅 o Jim2 - eBusiness	
Jobs Machines Que	otes Purchases CardFiles Items Stock Accounts Banking Management Scheduling eBusiness Tools	
Add View/Edit Create CardFile CardFile CardFile List CardFiles	Quick Add Merge CardFile Preview Fax   CardFile CardFile CardFile   CardFile Other CardFile	
Search 3m2 Nav Tree Cour Jobs Machines Quotes Purchases Cardfiles Car	Card File List - 1     Card File     Contact S     First name     Contact Type     Contact Type     Contact Type     Contact Type     Value     Groups     Contact Type     Value     Drag a column header here to group by that column	Image: specific constraints   Image: specif
Tools	CardCode Name Contact Address Suburb State Postcode Country	Branch Cust Terms
		•
Navigation Search Results	Add Edit View Run Cancel	0

## Skill Steps:

- 1. Select the CardFiles tab from the top of the Jim2 window.
- 2. Click Create CardFile List in the Ribbon.
- 3. Enter search information into any combination of fields. A simple example is to enter "Smith" into the Name field.
- 4. Press the <<Enter>> key on your keyboard.
- 5. A list of CardFiles will display on your screen.
- 6. Scroll through the resulting list to locate your preferred CardFile.
- 7. Double click your mouse on the required CardFile.

