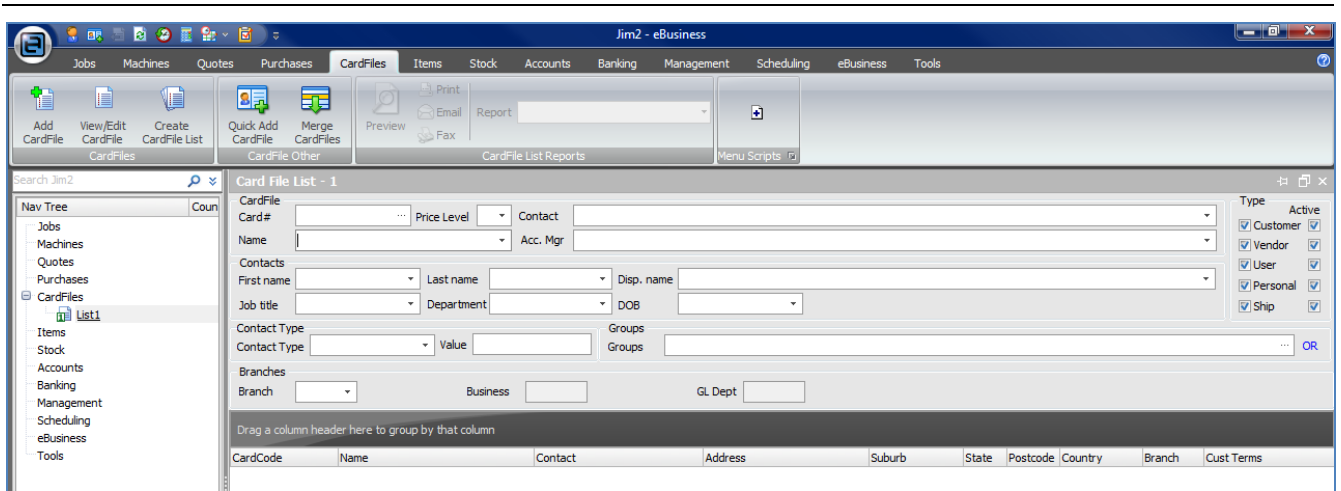


Create a Criteria-based CardFile List.

Describe: Able to create, name, and pin a list of CardFiles, according to criteria

Context: Creating lists is useful for seeing CardFiles which are grouped similarly (by suburb, type, etc).



Skill Steps:

1. Select the CardFiles tab from the top of the Jim2 window.
2. Click Create CardFile list in the Ribbon.
3. Click Advanced List at the bottom of the screen. This opens additional fields for criteria.
4. Restrict the amount of CardFiles to be searched by removing the ticks from Customer/Vendor, etc.
5. Enter criteria required into applicable fields. Choose from drop-down options for fields.
6. Click Run or press <<Enter>> once all criteria are entered.
7. Name the list by entering a short list description name in the field which displays "ListXX", at the bottom of the screen. You will see the List name change in the Nav Tree.
8. Pin the list by clicking the Pin icon at the top right of the list window.

Screenshot over page

Search Jim2

Card File List - M/DALE

Nav Tree

- Jobs
 - List1
 - List2
 - Time Sheet
- Contracts
 - 7
- Quotes
- Purchases
- CardFiles
 - M/DALE 6
- Items
- Stock
- Accounts
 - Creditors
 - TECHDIST
- Banking
- Management
 - Reports
- Scheduling
- eBusiness
- Tools
 - Setups...

Count

Booked

CardFile

Card# Price Level Contact

Name Acc. Mgr

Contacts

First name Last name Disp. name

Job title Department DOB

Contact Type

Contact Type Value Groups

Address

Address

Suburb MORTDALE

State PostCode

Country

Delivery Address

Address

Suburb

State PostCode

Country

Customer Terms

Terms

Vendor Terms

Terms

Branches

Branch Business GL Dept

Drag a column header here to group by that column

CardCode	Name	Contact	Address	Suburb	State	Postcode	Country	Branch	Cust Terms
ABECK	ABECK	Peter Bracken	72 Bonds Road	Mortdale	NSW	2223	Australia		Net 7 Days
CHECKERS	Checkers Printers Pty Limited	Barry Allen	Suite 24, 16 Barry Avenue	Mortdale	NSW	2223	Australia		COD
HAPPEN	Happen Business Pty Limited	Hugh Evans	Locked Bag A	Mortdale	NSW	2223	Australia		Net 7 Days
JC	Joe Cole	Joe Cole	26 Coopers Avenue	Mortdale	NSW	2223	Australia		COD
JIM2	Jim2 Sample Company		29-33 Pitt Street	Mortdale	NSW	2223	Australia		COD

Add Edit View Run Cancel

Navigation Search Results

List Advanced List 0 M/DALE Record 4 of 6

User: SYS Branch: CAN, Location: NSW Server: localhost\jim2 Licensed to: Implement Solutions Till: T2, Till 2

