

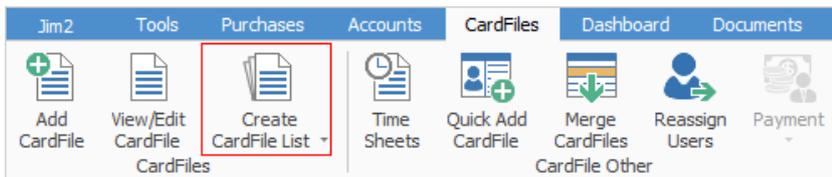
Create a Criteria-Based CardFile List

This document will explain:

- How to create, name and pin a list of CardFiles, according to criteria. Creating lists is useful for seeing CardFiles which are grouped similarly, ie. by suburb, type, etc.

Skill Steps:

- Select the CardFiles tab from the Jim2 ribbon.



- Click Create CardFile list in the Ribbon.
- Click Advanced List at the bottom of the screen. This opens additional fields for entering further criteria.
- Restrict the amount of CardFiles to be searched by removing the ticks from Active/Customer/Vendor, etc.
- Enter criteria required into applicable fields. Choose from drop-down options for fields.
- Click Run or press Enter on your keyboard once all criteria are entered.
- Name the list by entering a short list description name in the field which displays "ListXX", at the bottom of the screen.
- Pin the list by clicking the Pin icon at the top right of the list window.

CardFile List - Prospects

Card# Price Level Contact Type

Name Acc. Mgr Price Grp

Contacts

First name Last name Disp. name

DOB Dept. Job title

Contact Type Contact Type Value

Card Grp OR Parent Card#

Cust Terms Vend Term

Branch SubBranch GL Dept

Address

Address Address

Suburb Suburb

State Post Code State Post Code

Country Country

Drag a column header here to group by that column

| CardCode | Name | Contact | Address | Suburb | State | Post Code |
|-----------|------------------------|-----------------|--------------------|--------------|-------|-----------|
| ABEC.HO | Abeck Pty Ltd | Martin Harrison | 11 Smith Street | MARRICKVILLE | NSW | 2204 |
| ABEC.SHIP | Abeck Victoria Pty Ltd | Philip Morgan | 25 Testo street | HURSTBRIDGE | VIC | 3099 |
| ADV.KNOW | Advance Knowledge | Liz Marshall | 1/11 Hattie Avenue | PANORAMA | SA | 5041 |

For further information please go to Jim2 online Help file at <http://jim2help.happen.biz/index.html> and search CardFile.