



KEY FEATURES OF THE ADVANCED SEARCH INCLUDE:

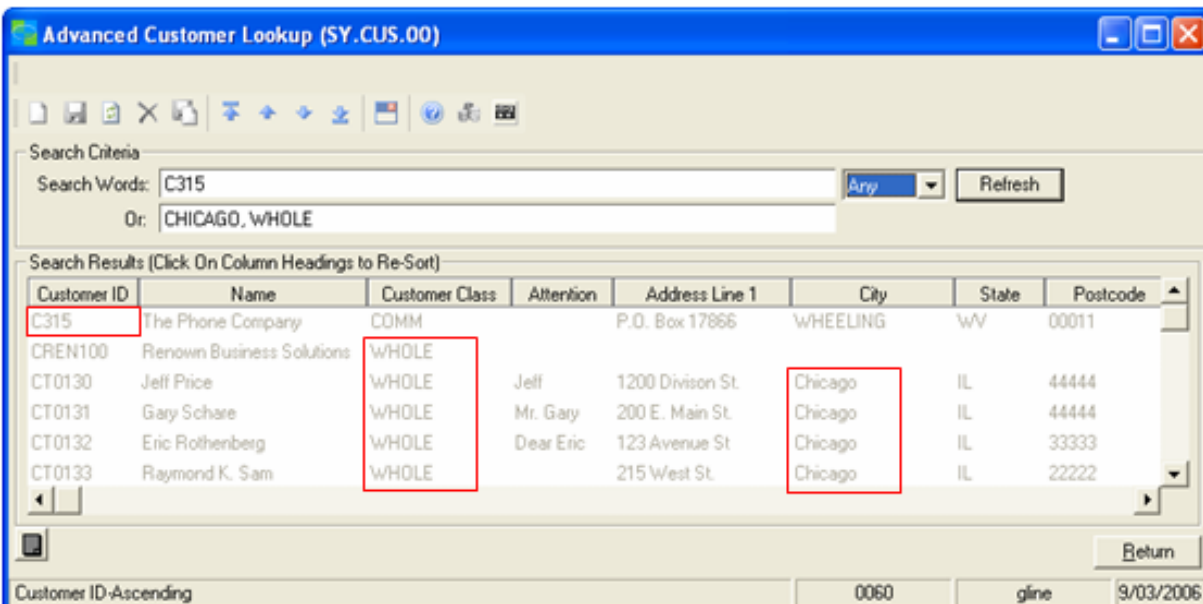
- ✚ Partial data can be entered in the key field
- ✚ Search window is launched on [F3] or field exit
- ✚ Searches multiple fields for entered criteria
- ✚ Sort by any column in the search list
- ✚ Define multiple search criteria
- ✚ Use (All, Any, Exact or Other than) search methods

An extremely quick, easy and powerful search tool for all Dynamics™ SL master records.

Simply type a few characters into the Source ID, press [F3] or exit the field and the Search Engine will search for all records with the entered values in any related field including; ID, Name, Address Details, Record Class, etc.

The Advanced Search customisation can be applied to any Microsoft™ Dynamics™ SL screen providing a more sophisticated PV on the primary master records (Customer, Vendor, Inventory, Project, etc).

Users can enter partial data in the ID field and then either [Tab] out of the field or press the [F3] key. On [F3] or field exit the Advance Search will be launched instead of the standard Dynamics™ SL - PV List. Any data entered in the Source ID field will be passed to the Advance Search as filter criteria for the initial list display. Users can change the search criteria and press [Refresh] to generate a new list, if the required record is not found in the first search.



It is possible to re-sort the list by clicking any column heading. For example, click the column heading "City" to sort the list in ascending order of City. Click the "City" heading a second time to change to descending order.

It is possible to perform different search methods including searches for; 'The Exact Phrase', 'Any of the Words' or 'All of the Words'. The Search Engine joins all related fields together in a single long string and then searches the entire text string for a match to the entered values using the selected search method.

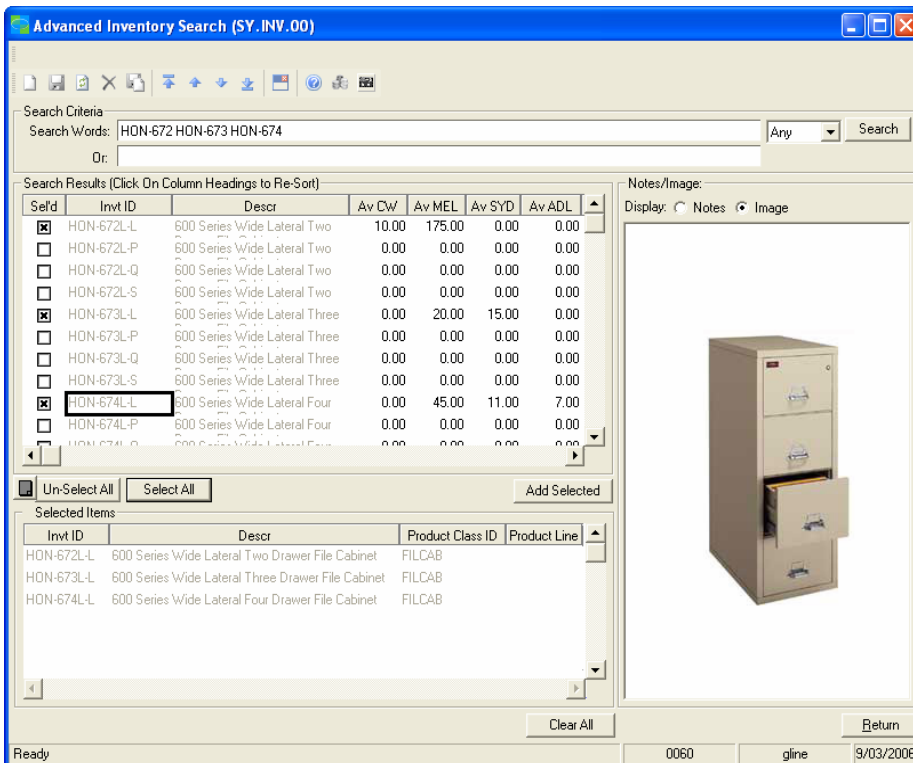
Perform quick searches on Customer Name, Customer Contact, City, State, Phone, Primary Contact and many others by entering the values directly into the Primary ID field on the source screen.

KEY FEATURES OF THE SALES ORDER INVENTORY ITEM INCLUDE:

-  Define multiple search words and a search method
-  Displays Inventory Site Available for each Item / Site
-  Displays Inventory Notes for On-Sell prompts, etc
-  Select multiple records from multiple searches
-  Returns all selected Items back to the Sales Order
-  Displays Inventory Item as you scroll down the list

Enables search and selection of multiple Inventory Items for building a Sales Order.

A button has been added to the Sales Order screen that allows the user to launch an Advanced Inventory Search. Users can enter search criteria and a search method (All words, Any Words or Exact Phrase). The Search Engine will then search for the entered criteria a list of Inventory Item related fields including; Inventory ID, Description, Class ID, Class Name, Inventory Note and others. All Inventory Items matching the search criteria will be displayed in the grid. Users can re-sort the records based on any column by clicking the column heading.

**Inventory Site Availability**

The search results display the availability of the item at all Item Sites helping see where stock can be sourced to make the sale.





Perform Multiple Searches

It is possible to search for 'Cabinets', select 3 items, then refresh the search for 'Chairs' and select further items. The selected items frame displays all items that will be returned to the Sales Order when the user clicks the 'Return' button.

Notes and Images

As you scroll down, the search results display either the; Note or Image for the selected row. Use Item Notes to define complementary products, assembly instructions, or other key Sales or Inventory details. Change between Notes or Images using the radio button at the top of the frame.

A great tool for users in phone sales environments where item selection needs to be performed as quickly and as efficiently as possible. Sales staff have all key information at their finger tips including; Site Availability, Price, Product Pictures, Product Information and Sales Notes. Toggle down the inventory list to select multiple items. Perform multiple search to select all required items prior to returning to the Inventory screen. Return all Items to the Sales Order screen in one hit saving time in performing multiple PV searches from Order Entry.

-  ***Helps Sales staff appear both efficient and knowledgeable when handling urgent sales calls***
-  ***Improves Order processing times via quick searches and efficient item selection***
-  ***Product Notes can be used to help staff up-sell complimentary items***
-  ***Displays Site availability details to help define the best location to source required items***

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