

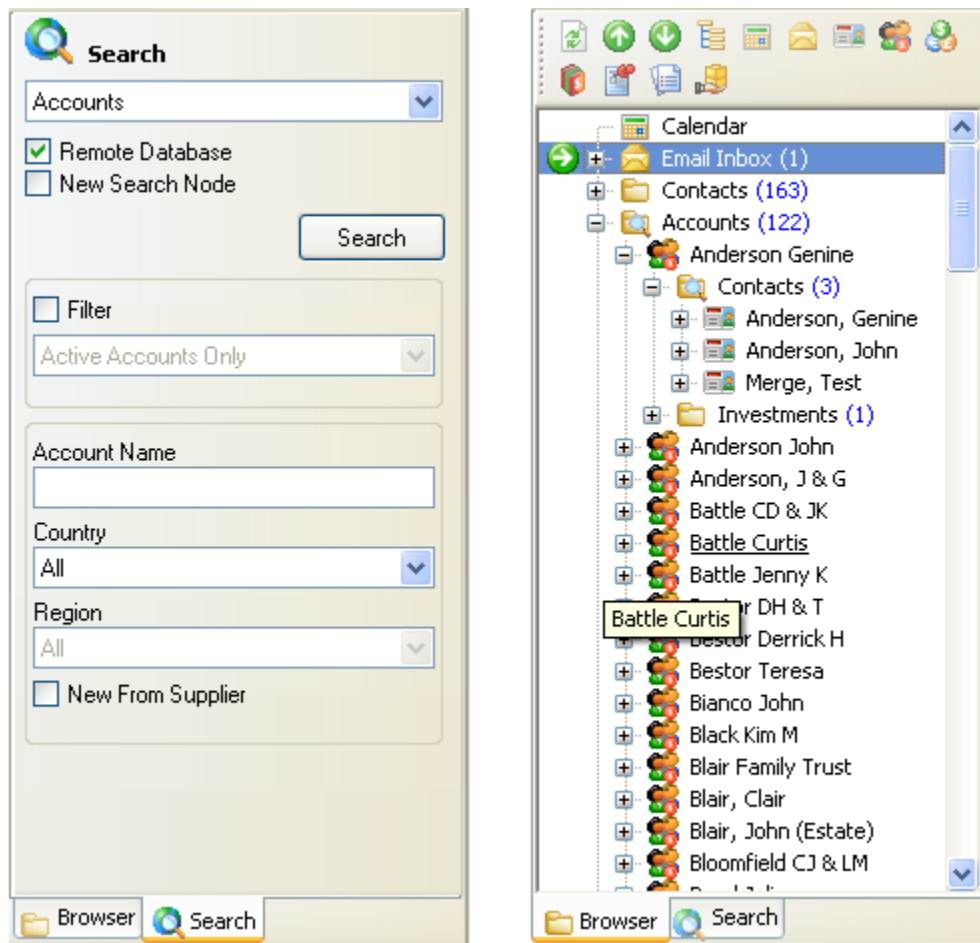
Search

One of the benefits of centralising all relationship information is that it can be accessed by many people in different ways. One of the areas in which Forté CRM excels is its ability to allow users to easily locate, and therefore use, information within its database.

Searching for information is possible through:

- Browsing the tree view and lists (groups).
- Using the Search tab or Search field.
- Querying information using the Query Builder.

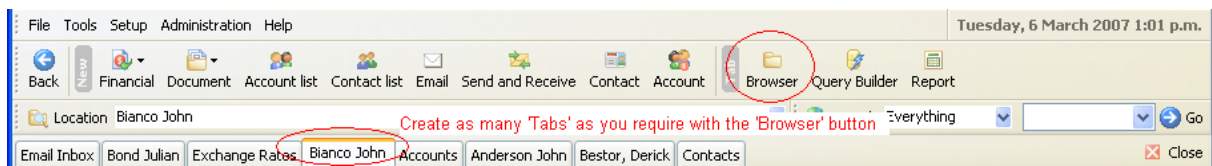
Every Forté CRM browser window has both a 'Browser' tab and a 'Search' tab at the bottom left. The image below shows the Search view and the Browser view.



Browsing

The browser, or tree view, is an intuitive way to view our data. You can quickly and easily see relationships between Accounts, Contacts and other entities. Click [+] to open a folder and click [-] to close the folder. Click on a selected item to see the details displayed in the right hand pane.

Click the 'New Browser' button at the top of the main window to open another instance of the browser. This gives you the ability to view several items simultaneously, with each browser in a new tab.



Searching

Search Field

A quick search facility is located at the top right of the screen.



Select the type of item you wish to search for from the drop down list, enter a value in the search field, and click Go. Items matching the search criteria will be displayed.

Search Results - John	
Description	Account Manager
Type : Contacts	
Anderson, John	John Frederick Smit
Johnson, Kara	Mary Stander
Johnson, Brat	Mary Stander
Johnson, Andrew	Ned Seagoon
Waligora, John	Beth Sawyer

Search Tab

Using the search tab enables you to be more specific when searching the database. Click on the Search tab at the bottom of the browser window to display the search pane. Select the type of item you wish to search for (Contact, Account etc.) in the drop down list at the top. If you are unsure what the items, then choose 'Everything'.

Each item type has different options to search on and filters that can be applied to locate the item. To search documents, notes, emails and appointments, select 'Document' from the drop down list and tick the required items. Enter the keyword or phrase you are looking for, and click the Search button.

The image below shows a search on items for the word 'Client'. The results are grouped by type (Note, Document, etc.) and are presented in a search ranking order with highest ranked at the top. Double click an item to open it.

The screenshot displays the 'Search' tab in the Forté CRM interface. On the left, the search configuration pane shows 'Document' selected in the search type dropdown. Under 'Include in search:', 'Appointment', 'Document', 'Email', and 'Note' are checked. The search criteria 'client' is entered in the 'Word or phrase in the document:' field. The 'Search' button is visible.

The main pane, titled 'Search Results - client', shows a table of results. The table has columns for 'Description', 'Rank', 'Date Created', and 'Account Manager'. The results are grouped by type, with 'Note' items listed below a 'Document' item.

Description	Rank	Date Created	Account Manager
Created on 27/07/2005 11:26 by Ned Seagoon (AM) fr clients about there accounts or any other related queries. new zealand world trade ltd has gone through great difficulty in finding a solution to prevent this from happening again and we will confirm in our next newsletter what the final decision is. we appreciate your understanding in this matter and for any further	0.0607927	27/07/2005	Ned Seagoon
Type : Note			
Note client has money from a pension plan at previous job. interested to invest but mostly confused as to what the best option would be. client is still young - 28 years - and my recommendation was to come and see us, as we would be able to provide the client with the different	0.0865452	7/07/2005	Ned Seagoon
Note client and portfolio was finalised. wide variate of funds were selected but mostly long term investments. client do not have any knowledge about investments and would prefer to take no risk at all. targets were set and outline report was given to the client . said to client that if they	0.0865452	5/07/2005	Ned Seagoon
Note client explained that they are unsure about setting up a portfolio and that they might feel saver in investing only in one fund. i emailed client back explaining that it is not unusual for clients to feel this way as they normally do not have all the information to their	0.0865452	12/07/2005	Ned Seagoon
Note client asked if investments are made directly with us. explained that the assets are placed with a brokerage firm and we handle all the account related needs like transferring assets etc. we get authorisation from the client to buy or sell investments. we will also keep the client up to date	0.0827456	4/07/2005	Ned Seagoon
Note client requested some information about the type of clients and financial situations we like to deal with. client is looking for some advice that should not be overly aggressive or to cautious.	0.0827456	11/07/2005	Ned Seagoon

Note: The 'reverse' highlighted search words and ranking is currently only available in Enter rse and Hosted versions of Forté.

To remove search results from the browser:

Search results are added to the browser treeview. A subsequent search will replace the existing search results. To remove the search results from the treeview, right click on 'Search Results' and select 'Remove node from tree'.