Using Simple or Advanced Find

Find offers two options:

- Simple ⊟

  Simple Find allows you to do a quick search using the most common transaction types. Transaction Types include
  results are displayed in the lower portion of the window. You can view an individual transaction by highlighting it a

  Go to the Edit menu and click Find. Click the Simple tab.

- Advanced ⊟

  Advanced Find lets you do a more detailed search for transactions than you can do using Simple Find. Advanced F
  apply a filter, you choose how you want Reckon Accounts to restrict the search results—to certain customers, for e
  transactions that don't meet your criteria.

  You can apply filters either one at a time or in combination with each other. Each additional filter you apply furthe

  The search results are displayed in the lower portion of the window. You can view an individual transaction by high
  Report.

  Go to the Edit menu and click Find. Click the Advanced tab.

To use Simple find for basic searches

1. Go to the **Edit** menu and click **Find**.
2. Click the **Simple** tab.
3. Click the **Transaction Type** drop-down list and choose the transaction type.
4. Fill in the fields that appear.
5. Click **Find**.
6. To open a transaction, select the transaction you want to see and click **Go To**.
7. (Optional) To print a report showing the transactions\that were found, click **Report**. When the report appears,
   click **Print** at the top of the report.
8. To start over or search for different transactions, click **Reset**.

To use Advanced find for more detailed searches

1. Do a simple find, described above.
2. Click the **Advanced** tab and use filters ⊟ to refine your search.

   When you create a report, it may show more information than you need. For example, a sales by customer repor
   This would be too much information if all you wanted was to see this month's sales to one of your customers.

   Filters let you change the scope of a report. When you apply a filter to a report, you choose how you want Reckor
   Reckon Accounts then excludes from the report any transactions that don't meet your criteria.

   You can apply filters either one at a time or in combination with each other. Each additional filter you apply furthe

   Example

   Normally, you would use the Date filter by itself to show last year's sales in a sales report. But to show last year':
   with the Name filter. Each additional filter further restricts the scope of the report.

   Reckon Accounts provides many different types of filters for reports. The ones you'll probably want to use most o
   sell), Memo (for your memo notes on transactions), Name (for customer, job, supplier, or employee names), Nur
   specific types of transactions like bills or invoices).

     You can also use the Centres to get a filtered list of transactions. For example, another way to find last year's
     Customer Centre, choose **All Sales Transactions** from the **Show** drop-down list above the transactions, and

   How to fill in fields for filters ⊟

Each filter has its own set of fields to fill in:

Account	FOB
Amount	
Date	Paid status
Item	Paid through
Memo	Payment method
Name	Payroll item
Number	Posting status
Transaction type	Printed status
Aging	Received
Class	Rep
Cleared	Ship date
Customer type	Ship via
Detail level	Template
Due date	Terms
Entered/Modified	Supplier type

3. Select a filter from the list and fill in the fields that appear. You can use multiple filters for your search.

4. Click **Find**.

5. If the search results are too long, you can narrow your search results. ▣

> If the list of found transactions is too long, you can apply additional filters to the search criteria. Each additional f
>
> 1. In the **Find** window, you can modify the search criteria or you can use Advanced Find to apply filters to you
>
> 2. Fill in the fields that appear.
>
>   How to fill in these fields
>
> 3. Click **Find**.

See also

- Find a transaction: examples
- Print search results
- Start a search over