Top Tips for Locating Information

Use 'Group, client or jobs' search

View documents, tasks and jobs from an overall group perspective or a granular level in a matter of seconds.

GROUP CLIENT OR JOB SEARCH
Type a few characters to display relevant client group, clients and jobs.

GROUP OR CLIENT LEVEL
Display information at the group level or select a client to display information for a specific client.

SELECT A JOB
When the 'Show Jobs by Client' practice setting is Off, the Jobs drop-down displays all Jobs for the client group.

Use Filters & Sort on Columns for Dynamic Lists

Refine your clients, tasks, documents and jobs lists by applying filters and or sorting to display only the information you need to see.

LIST ICON
Hover over the column heading and click the List icon.

FILTER ICON
Filtering from the column heading displays the values that can be filtered on.

FILTERS TAB
Displays a list of the columns that can be filtered on.

Filters can be applied even if the column isn't currently displayed in the list.

Note: Filters are not relevant for certain columns.

SELECT OR DESELECT VALUS
Select or search values as required.
The list updates dynamically to reflect the filters selected.

SORT
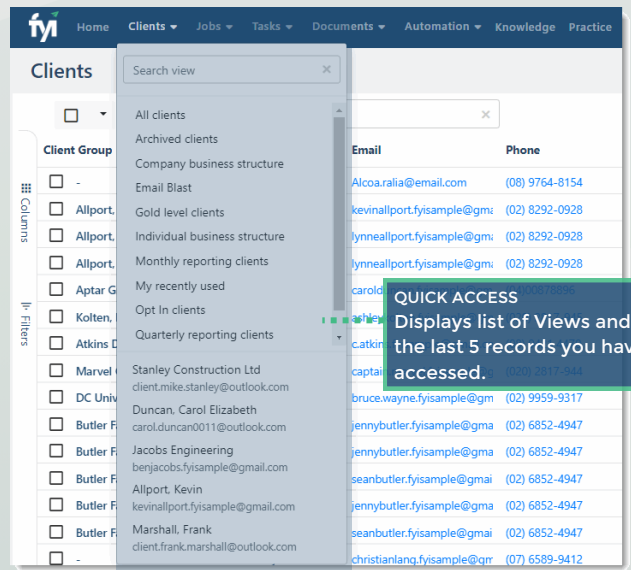The up or down arrow shows if an ascending or descending sort has been applied.
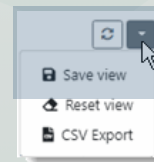
Use Views

Jump to information you need in a single click using pre-defined Views.
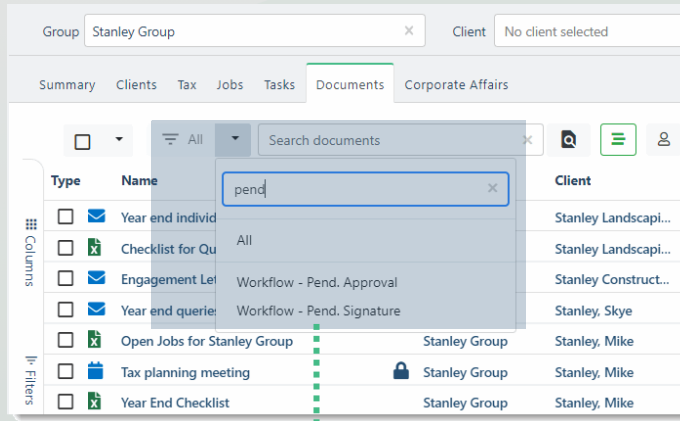
SEARCH VIEWS
Where there are more than 10 Views, use the scroll bar or type in a few characters to quickly locate a View.
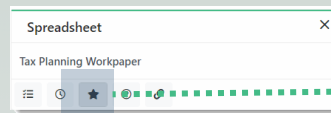
QUICK ACCESS
Displays list of Views and the last 5 records you have accessed.

CREATE AND SAVE VIEWS
Changes made to lists, such as columns added, sequence of columns, filters and search criteria can be saved as a View specific for your practice.
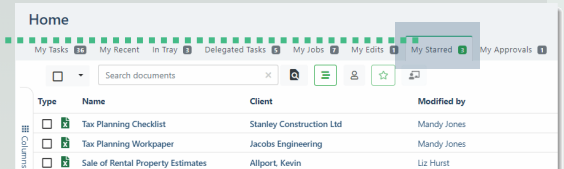
Star Documents

Use the Star in your document action toolbar to mark favourite documents for quick and easy access.
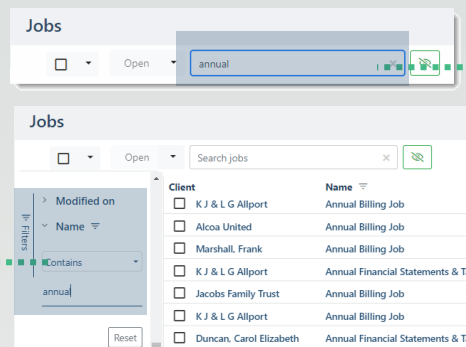
STAR A DOCUMENT
For quick access to favourite documents.
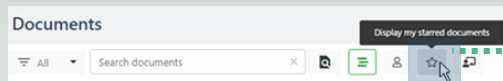
DISPLAY STARRED DOCUMENTS
In all Documents lists, or go to the Home - My Starred tab.

Search

Use text search to locate specific information. The search options vary across each workspace.

SEARCH FIELD
Text search in workspaces for Jobs, Clients, Tasks, Documents, Automation and Knowledge.

CONTAINS OR EQUALS FILTER
Text search by filtering on columns such as Name for Jobs, Client and Documents.

Find whatever you need in a flash.
For more information on Search & Retrieval, visit the FYI Help Centre at support.fyidocs.com