



Help and tips for the situation:

How to find the details of a person?

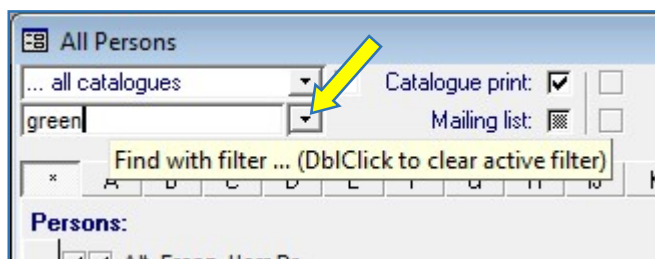
There are several ways to look-up the details of a person or organisation. Here are two very common ways and a very user-friendly quick tip.

1. Use menu “Persons / All Persons” and “... find with filter”.
2. DbIClick any person list (*i.e. related dossiers in window “All Activities”*).
3. Use menu “Activities / New ...” and directly DbIClick any auto expanded entry.

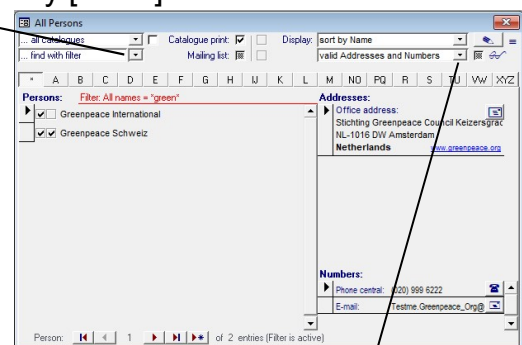


1. Use menu “Persons / All Persons” and “... find with filter”:

For example, use menu “Persons / All Persons” to open the window “All Persons”.



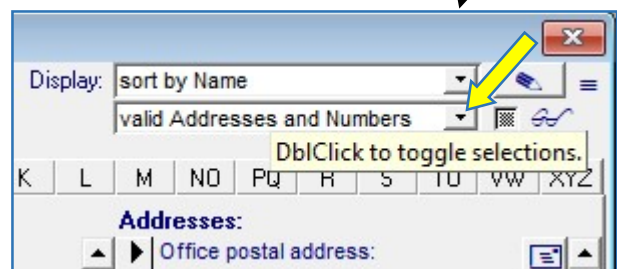
a) **Type** the name or a distinctive part of the name (*i.e. “green”*) in the field “... find with filter” and press the key [Enter].



➔ The window “All Persons” will now filter all entries (persons and organisations) and display only those who match your find entry. The now active filter is displayed in red font.

b) **Select** the desired entry to see most of its details at the right side of this window.

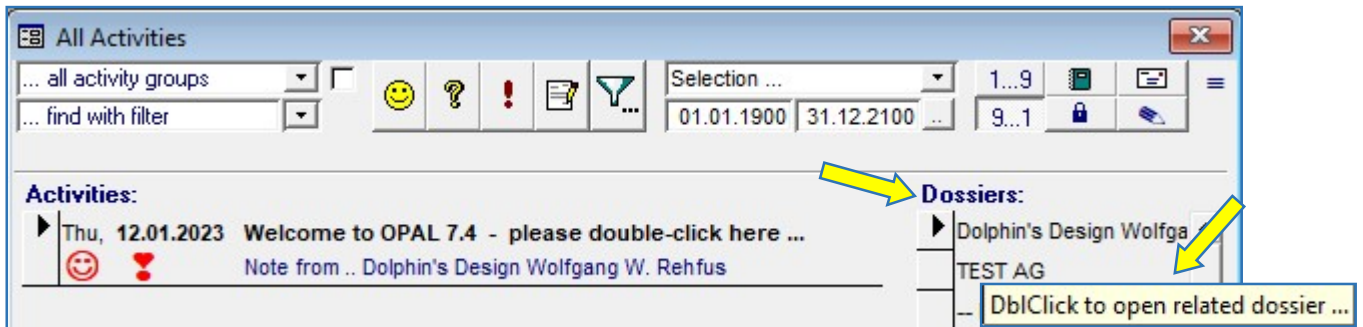
Use the lower “Display:” selection list to display either the addresses and numbers or the relations.



c) **DbIClick** the selected entry (*i.e. the name of the person or organisation*) to open the window “Person Details” with all details including all addresses, all numbers, all relations and the complete dossier of the entry.

2. DbIClick any person or dossier list:

For example, use menu “Activities / All Activities” to open the window “**All Activities**”.



- Select** any activity, which is related to the desired person or organisation, to display all related “**Dossiers**” of that activity at the right side in this window.
- DbIClick** the desired entry (*i.e. the name of the person or organisation*) to open the window “**Person Details**” with all details including all addresses, all numbers, all relations and the complete dossier of the entry.

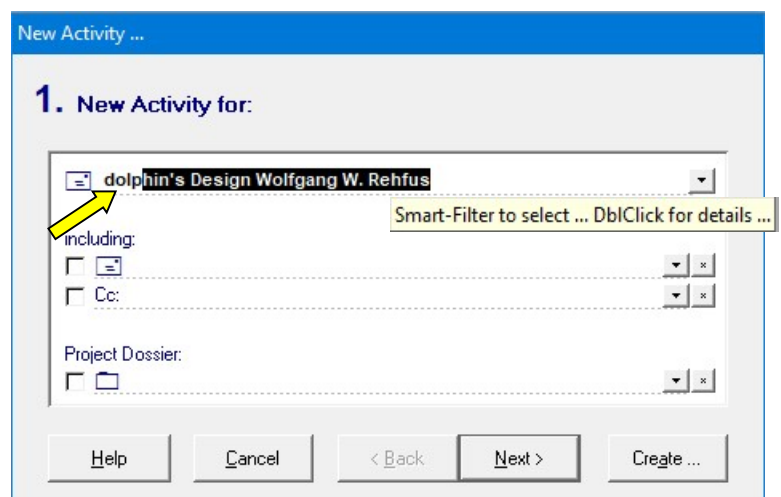
3. Use the menu “Activities / New ...”:

Tip

For example, use menu “Activities / New ...” to open the window “**New Activity ...**”.

- Press the key [Tab] to select the first field.
- Type** the first few letters of the desired person or organisation (*i.e. “dolph” to find “Dolphin’s Design Wolfgang W. Rehfus”*).

➔ With every key typed into the field, automatically the first match in the database will be displayed. If you don’t know the first letter(s), type what you know and press [Enter] to use the Smart-Filter.



- DbIClick** the field with the automatically expanded name of the entry to open the window “**Person Details**” with all details and the complete dossier of this entry. Close the window “New Activity ...” with [Cancel] and select the desired tab in the window “**Person Details**”.

