OPAL Help & Tips



easy and smart !

OPAL Help and Tips

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Tip

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. DblClick any person list (i.e. related dossiers in window "All Activities").
- 3. Use menu "Activities / New ..." and directly DblClick 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".

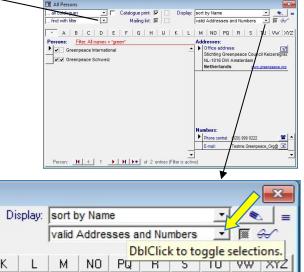
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green	Mailing list: 🕅 🗌	
×	Find with filter (DblClick to clear active filter)	к
Perso		

- 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.

relations and the complete dossier of the entry.

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].



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How to find the details of a person?

C)

DblClick 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

Addresses:

Office postal address:

E

2. DblClick any person or dossier list:

For example, use menu "Activities / All Activities" to open the window "All Activities".

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all activity groups find with filter	 	<mark>0</mark> ?	1	B	V	Selection 01.01.1900	31.12.2100	-	19 91		E	=
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© *	Welcome to OPAL 7.4 - please double-click here Note from Dolphin's Design Wolfgang W. Rehfus							_	TEST AG		l	
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- a) **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.
- b) **DblClick** 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 ...":

For example, use menu "Activities / New ..." to open the window "New Activity ...".

- a) Press the key **[Tab]** to select the first field.
- b) **Type** the first few letters of the desired person or organisation *(i.e. "dolp" 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.

New Activi	ty for:		
<u> </u>	Design Wolfgang	W. Rehfus	<u>.</u>
		Smart-Filter to s	elect DblClick for de
ncluding:			▼ ×
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Project Dossier:			
			▼ ×

c) DblClick 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".

🕄 Person					— ———————————————————————————————————
Dolphin's Design	Wolfgang W. Rehf	us			=
Details	Addresses	Numbers	Relations	Dossier	S
Organisation:		0		Foto, L	.ogo, Businesscard, etc.
Dolphin's Desig	gn Wolfgang W. Re	hfus	<u> </u>	DblClie	k for Help "

Tip