

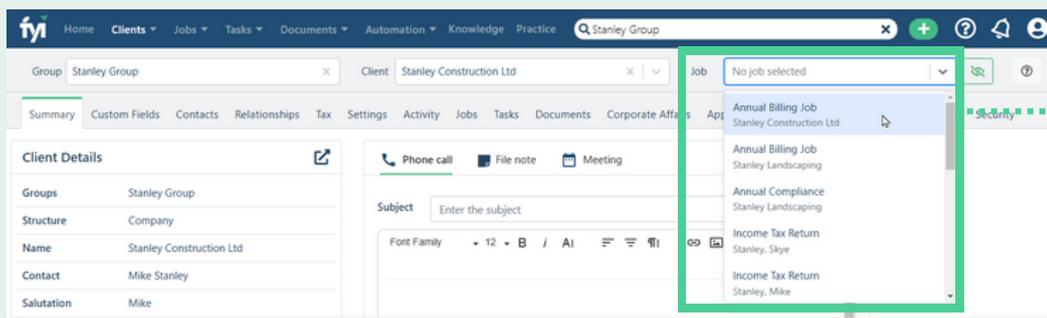
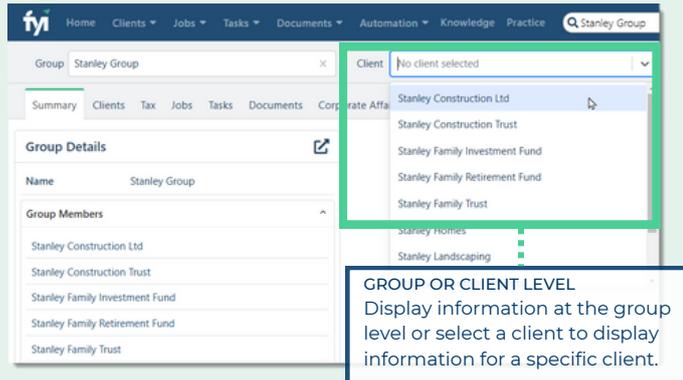
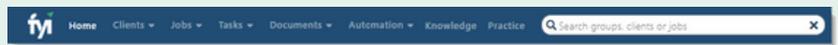
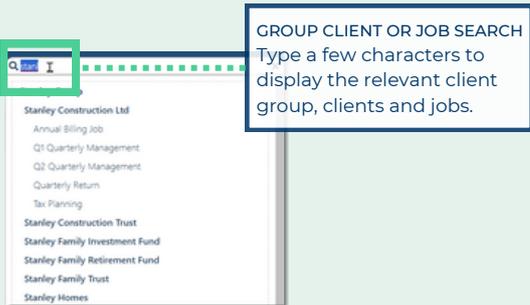
Top Tips for Locating Information



Best Practice Guide

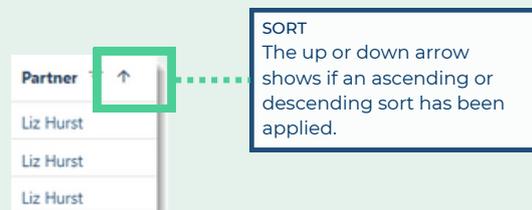
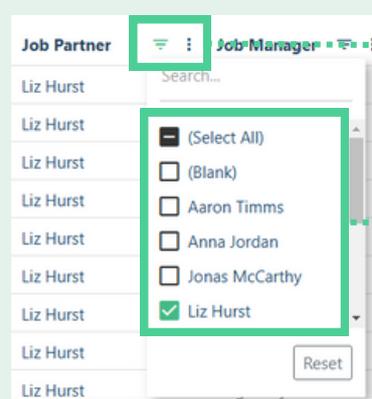
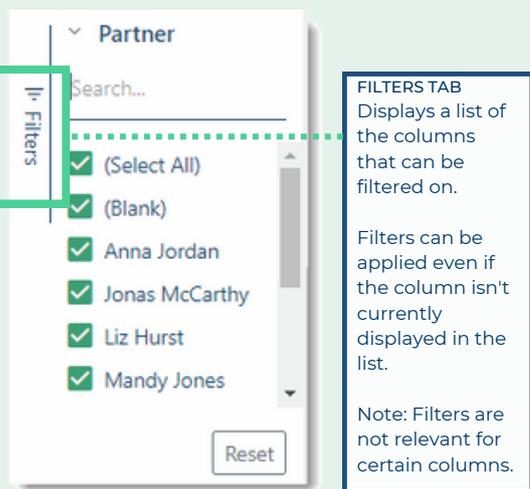
Use 'Group, client or jobs' search

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



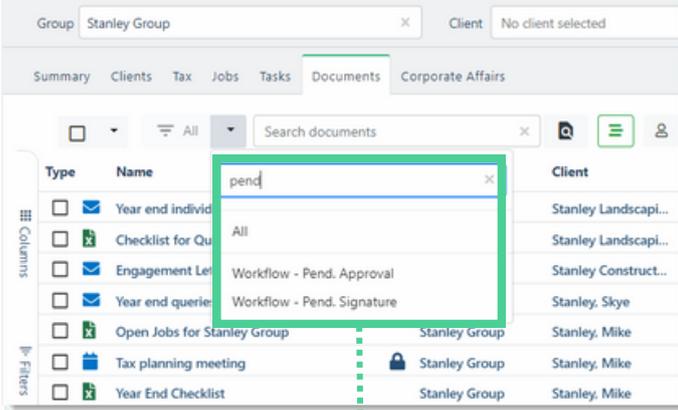
Use Filters & Sort on Columns for Dynamic Lists

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

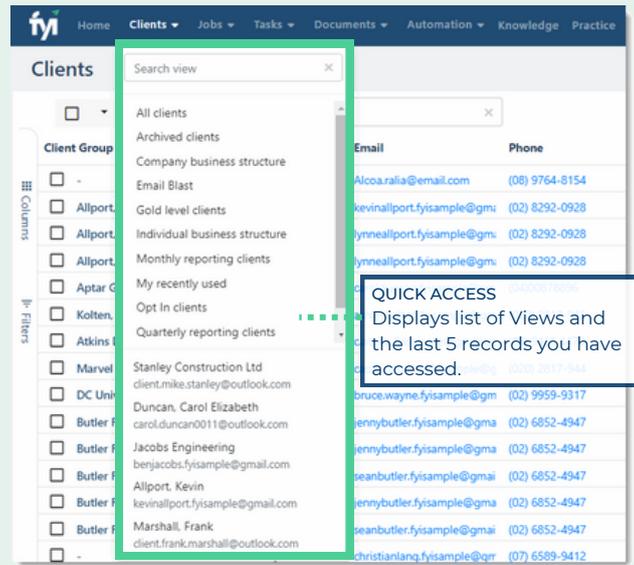


Use Views

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.



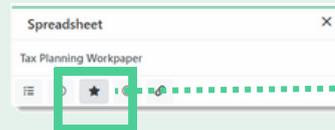
CREATE AND SAVE VIEWS
Changes made to lists, such as columns added, sequence of columns, filters and search criteria can be saved as a View specific for your practice.

Star Documents

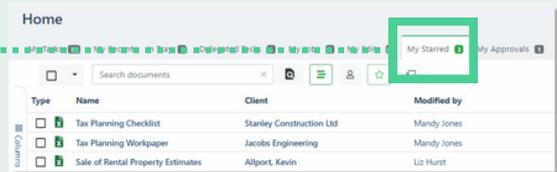
Use the Star in your document action toolbar to mark favourite documents for quick and easy access.



DISPLAY STARRED DOCUMENTS
In all Documents lists, or go to the Home - My Starred tab.



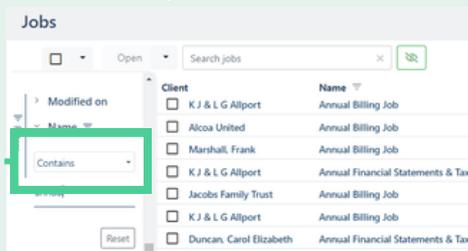
STAR A DOCUMENT
For quick access to favourite documents.



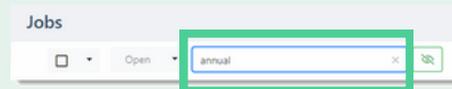
Search

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

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



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



Find whatever you need in a flash.

For more information on Search & Views, visit the FYI Help Centre at support.fyi.app