

OTHER USES OF THE FIND FORM

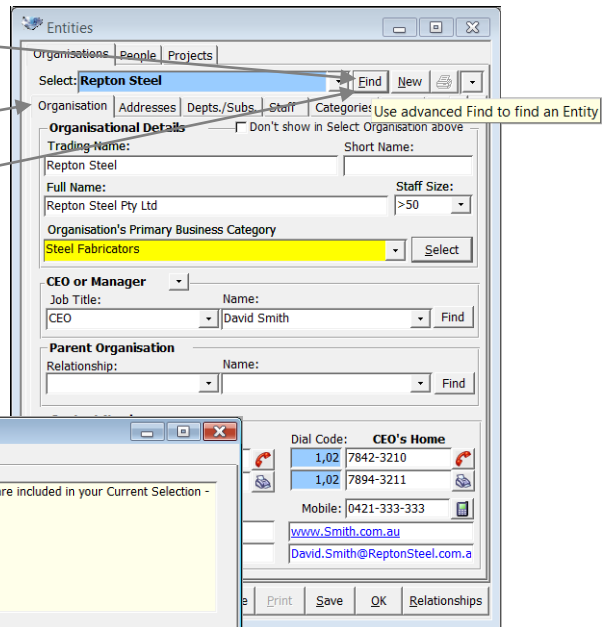
Besides using the FIND Form to perform a Mail-Merge you will also **FIND** Buttons scattered throughout the user interface. When clicked they will configure the FIND Form to the task in hand.

Exercise – Finding an Organisation

Suppose we want to find an Organisation in Macksville, NSW, Australia but can't remember its name.

At the head of the 'Entities' Form there is a **Find** Button.

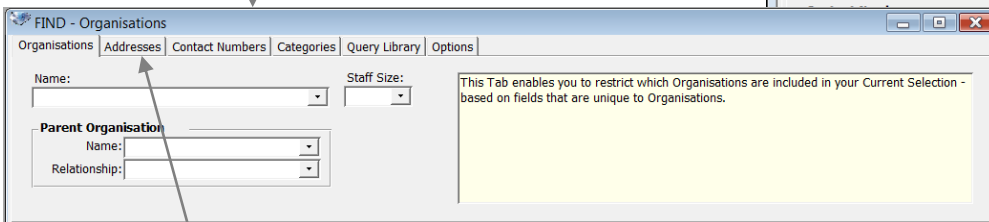
You can use this to find an Organisation, Person or Project dependant upon whether you are on the Organisations, People or Projects Tab.



Click the **Organisations** Tab.

Click the **Find** Button.

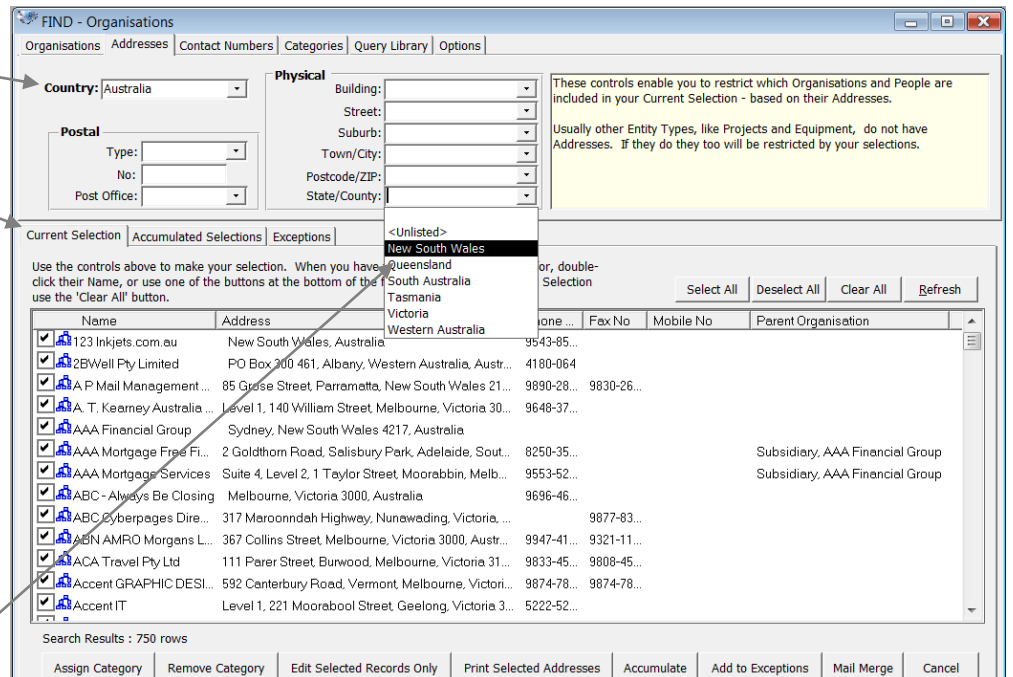
This will open the **FIND** Form to look for an Organisation.



Now click the **Addresses** Tab.

Enter **Country** as 'Australia'.

The **Current Selection** will show all the Organisations in your Database that are in Australia. (Don't worry if this is different to the results shown as there are less in the trial database.)



If you use the 'Pull-Down List' Button at the end of State/Country you will

find it is limited to the States that are in the 'Current Selection'. (So it could be less than that shown.)

Select **State/Country** 'New South Wales'.

Then **Town/City** 'Macksville', which of course is in 'New South Wales'. As all controls only list data that is currently in the 'Current Selection'.

Name	Address	Phone ...	Fax No	Mobile No	Parent Organisation
<input checked="" type="checkbox"/> Anne Ainsworth Ltd	10 Nambucca Street, Highbury, PO Box 25 Highbu...	7842-32...	7894-32...		Subsidiary, Repton Steel
<input checked="" type="checkbox"/> Repton Steel	2 Yarrahappnee Street, Highbury, PO Box 145 Ma...	5678-01...	5678-00...		

At this point your 'Current Selection' should match those shown, as these are hypothetical Organisations that are in the trial data.

Name	Address	Phone ...	Fax No	Mobile No	Parent Organisation
<input checked="" type="checkbox"/> Anne Ainsworth Ltd	10 Nambucca Street, Highbury, PO Box 25 Highbu...	7842-32...	7894-32...		Subsidiary, Repton Steel
<input checked="" type="checkbox"/> Repton Steel	2 Yarrahappnee Street, Highbury, PO Box 145 Ma...	5678-01...	5678-00...		

Now look at the options listed under **Street**. It should of course be limited to 'Nambucca Street' and 'Yarrahappnee Street'. (Well it was when I tried it. ☺)

If you now double-click **Ann Ainsworth Ltd** it will display their record in the **Entities** Form.

Entities

Select: **Anne Ainsworth Ltd**

Organisation: Anne Ainsworth Ltd

Trading Name: Anne Ainsworth Ltd

Full Name: Anne Ainsworth Ltd

Staff Size: 1-5

CEO or Manager: David Smith

Parent Organisation: Repton Steel

Contact Numbers:

Dial Code:	Business	CEO's Home
Phone:	1,02 7842-3210	1,02 7842-3210
Fax:	1,02 7894-3211	1,02 7894-3211
Mobile:	0421-333-333	

Web: www.AnneAinsworth.com.au

E-mail: enquiries@AnneAinsworth.com.au

Exercise - Challenge

Had we remembered that 'Anne Ainsworth Ltd' is a Subsidiary of 'Repton Steel' or share the same CEO we could have found them without using the FIND Form.

See if you can find your way back to Repton Steel's record and then back again (both ways), without using FIND.

Hint: Remember you can go to someone else's record just by clicking on their Name

Exercise – FIND a Person

Find someone in 'Macksville' called 'Smith'. (Yes I know you know who it is – but do it anyway!)

Entities

Select: **Brian McGuigan**

Person: Brian McGuigan

Click on the **People** Tab of the 'Entities' Form and then the **Find** Button at the top.

Enter **Last Name** as 'Smith'.

Click on **Addresses** Tab.

FIND - People

Person: Smith

Last Name: Smith

Enter **Town/City** as 'Macksville'.

As you can see there are actually quite a few Smith's in Macksville.

However there is probably sufficient information displayed in the FIND Form for you to decide who you are looking for anyway.

Note the display order sorts people who live together into a group based on their Phone Number.

The screenshot shows the 'FIND - People' window with the 'Physical' tab selected. The 'Town/City' field is set to 'Macksville'. Below the form, a table displays search results:

Name	Address	Phone ...	Fax No	Mobile No	Job
<input checked="" type="checkbox"/> Brenda Smith	2 Epping Place, Highbury, Macksville, New South ...	6891-45...			Marketing Consultant, Repton S...
<input checked="" type="checkbox"/> Elwyn Smith	2 Epping Place, Highbury, Macksville, New South ...	6891-45...			Advertising Consultant, Repton ...
<input checked="" type="checkbox"/> John Smith	2 Epping Place, Highbury, Macksville, New South ...	6891-45...			Errand Boy, Repton Steel
<input checked="" type="checkbox"/> Ken Smith Jr.	2 Epping Place, Highbury, Macksville, New South ...	6891-45...			Area Manager, Repton Steel
<input checked="" type="checkbox"/> Mark Smith	2 Epping Place, Highbury, Macksville, New South ...	6891-45...			
<input checked="" type="checkbox"/> David Smith	10 Nambucca Street, Highbury, PO Box 25 Highbu...	7842-32...	7894-32...	W: 0421-333-3...	CEO, Repton Steel
<input checked="" type="checkbox"/> Jenny Smith	10 Nambucca Street, Highbury, PO Box 25 Highbu...	7842-32...	7894-32...	W: 0722-333-2...	Accounts Person, Repton Steel

Exercise – Finding an Organisation's CEO or Manager

Just suppose your looking for the CEO or Manager of an Organisation who's name you've forgotten, but his Mobile Number is '0421-333-333'.

If you click on the **Find** Button alongside the CEO or Manager you will get.

The first screenshot shows the 'FIND - CEO or Manager for Repton Steel' form with the 'Contact Numbers' tab selected. The second screenshot shows the 'Entities' form with 'Repton Steel' selected and the 'CEO or Manager' dropdown set to 'David Smith'. A 'Find' button is visible next to the name.

Since GEM knows CEO's have to be People, it has formatted the FIND form to look for a Person and changed the **Title Bar** of the Form to remind you of what you are doing. (Just in case you get interrupted.)

This time use the **Contact Numbers** Tab and enter the work mobile '0421-333-333'.

Et viola – the famous 'David Smith'.

The screenshot shows the 'FIND - CEO or Manager for Repton Steel' window with the 'Contact Numbers' tab selected. The 'Work Mobile' field is set to '0421-333-333'. Below the form, a table displays search results:

Name	Address	Phone ...	Fax No	Mobile No	Job
<input checked="" type="checkbox"/> David Smith	10 Nambucca Street, Highbury, PO Box 25 Highbu...	7842-32...	7894-32...	W: 0421-333-3...	CEO, Repton Steel

You will notice that if you click outside the FIND Form whenever you are looking for a single Person or Organisation, the computer will beep at you and nothing will happen. That is because at this point GEM is waiting for you to select someone before it will allow you to get on with something else.

Exercise – Finding the Parent Organisation of a Subsidiary

Suppose you did not know who the Parent Organisation of 'Ann Ainsworth Ltd' was – but knew they were 'Steel Fabricators' in NSW.

Click on the **Find** Button alongside the Name of the Parent Organisation.

This will give you a FIND Form formatted to look for an Organisation.

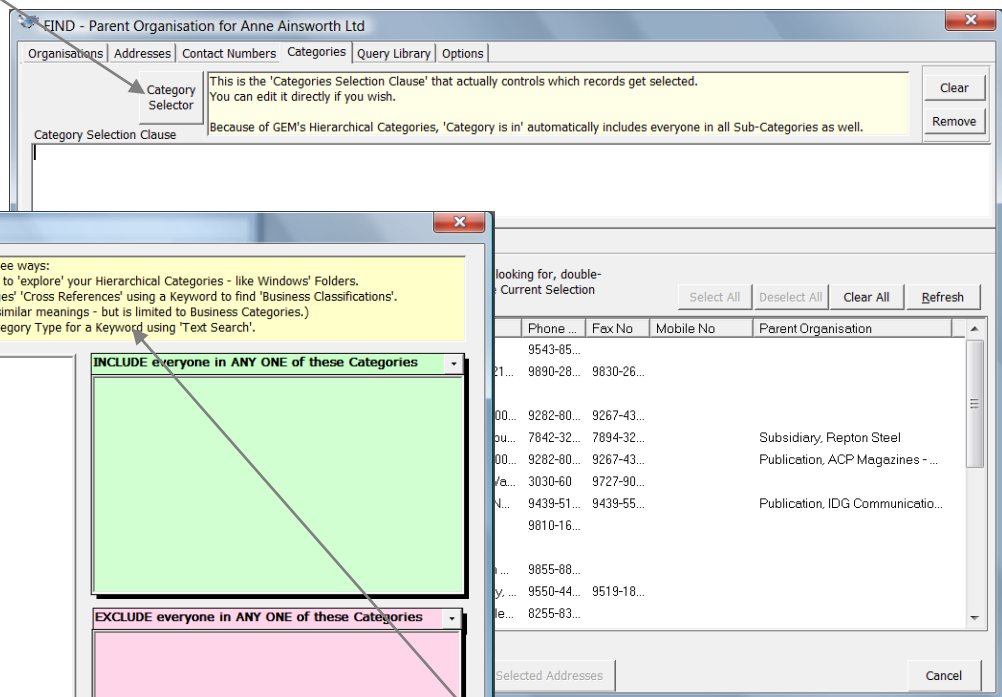
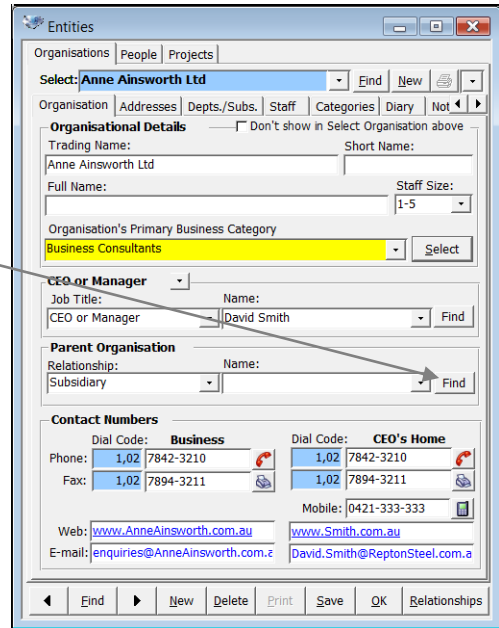
Click the Addresses Tab and specify the State as 'New South Wales'.

The click on the **Categories** Tab of the FIND Form, which looks like this:

Once again don't worry if you Current Selection is less than this.

Click on the **Category Selector** Button to select the 'Business Category' required.

This will display the **FIND – Category Selector** Form.



This Form, along with many others in the system features a context sensitive **Information Panel**. Point at each control on the form in turn and the Information Panel will tell you what it does. **Read them now.**

As with selecting Categories elsewhere in the system, there are 3 ways of doing it. We are going to use Text Search as this is the most general purpose. So click **Text Search**.

This will change the controls at the top of the form to look like this.

Again point at each control to see what it does.

Enter **Keyword** 'Steel'.

Enter **Category Type** 'Business Categories'.

This will display all Categories containing the word 'Steel'.

Select the **Steel Fabricators** Category and drag and drop it on the green **INCLUDE** Panel.

Click the **OK** Button. This will generate and return a **Category Selection Clause** to the FIND Form and display the only 'Steel Fabricator' in NSW in the database – 'Repton Steel' of course.

Before you double-click 'Repton Steel', point your mouse at the 'Category Selection Clause', 'Operator' and 'Category Selector' Button and see what the 'Information Panel' now tells you about them.

These Controls, used repeatedly, enable you to construct 'Category Selection Clauses' of whatever complexity you like – all without knowing any SQL at all. This combined with the fact that GEM's Hierarchical Categories automatically include everyone in all their Sub-Categories too, makes GEM's FIND Form an incredibly powerful, yet simple tool to use. But for the time being we are going to confine ourselves to simple selections only.

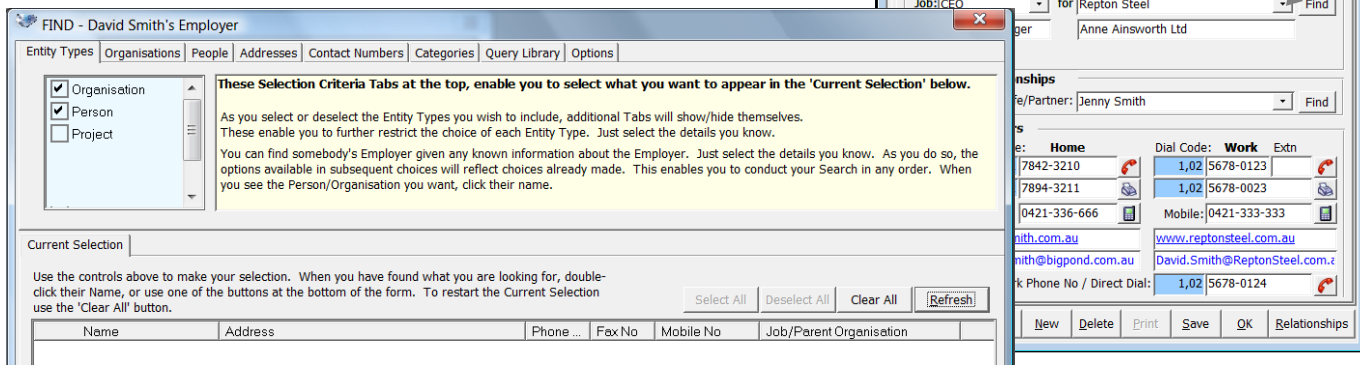
Double-click **Repton Steel**. The FIND Form will close and the system will set Anne Ainsworth Ltd's parent company to 'Repton Steel'.

Name	Address	Phone ...	Fax No	Mobile No	Parent Organisation
<input checked="" type="checkbox"/> Repton Steel	2 Yerrahappnee Street, Highbury, PO Box 145 Ma...	5678-01...	5678-00...		

Exercise – Finding Someone’s Employer

Display David Smith’s Record.

If you needed to FIND his employer’s name you could use the FIND Button associated with his Job. If you click this **Find** it will display a FIND Form that enables you to find either Organisations or People, as his employer could be either.



So just open it and close it again.

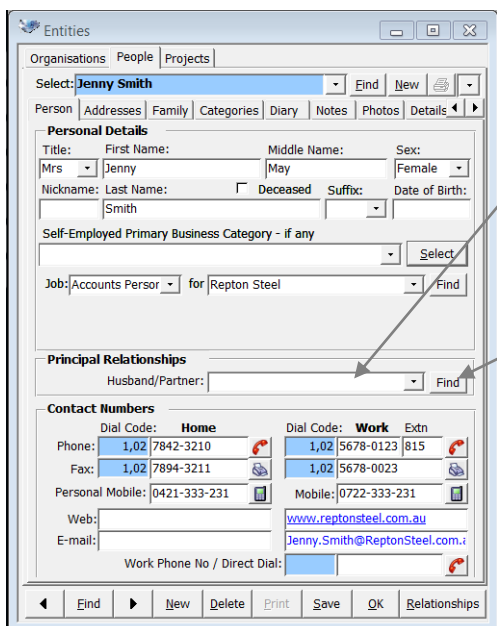
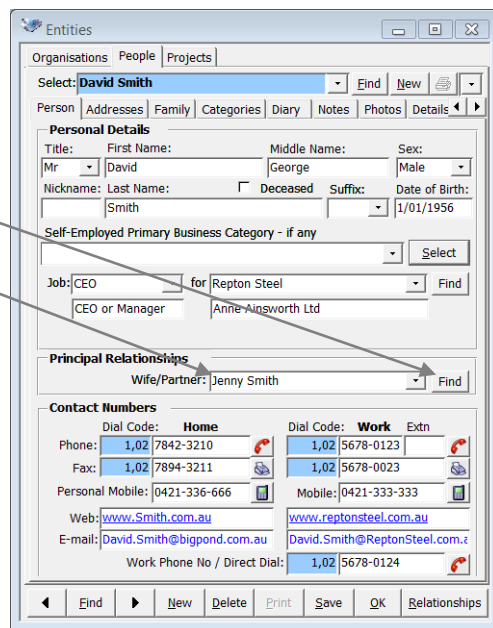
Exercise – Finding someone’s Spouse/Partner

Display David Smith’s Record. You can see in the trial data he is married to **Jenny Smith**.

We are going to divorce them and then use the **Find** Button to re-marry them.

So first select ‘Jenny Smith’ by dragging over her name until it turns black.

Then press the <delete> Key on the Keyboard. Her name will disappear.



Now display Jenny Smith’s Record. You will see she’s no-longer married either.

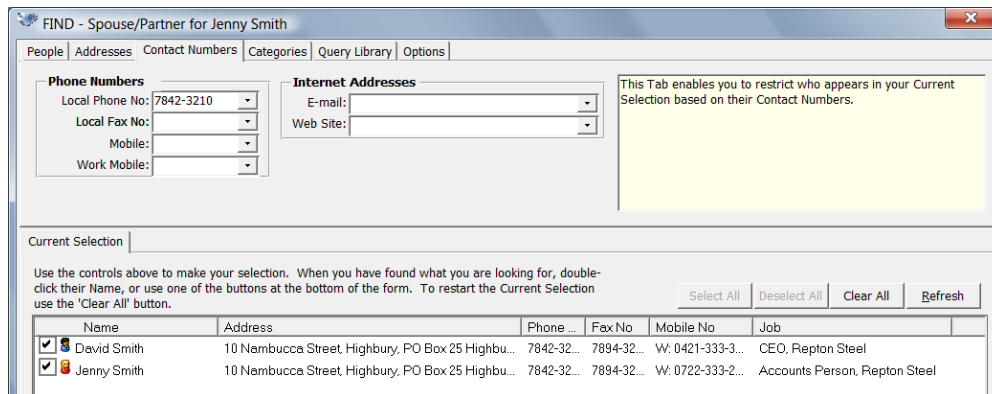
Now click the **Find** Button alongside ‘Husband/Partner’.

Obviously there are many ways we can find her Husband’s name. (We’ll pretend we forgotten it for a moment.)

We certainly know they live together and therefore have the same Home Phone No. So click the **Contact Numbers** Tab of the FIND Form, when it displays and enter Jenny smith's phone number in **Local Phone No.**

The FIND Form will display both David and Jenny living at the same Address.

Simply double-click David's name, the FIND Form will close and they're married again.



Er, well not quite. In doing this exercise I discovered a BUG! If you charge off and check whether the system also married David to Jenny, you will find it didn't. So now we've got the crazy situation that Jenny's married to David, but David is NOT married to David – OOPS!

There is a work-around however having got David as Jenny's Husband, reselect him name using the pull-down list at the end of the control. That fixes the problem.

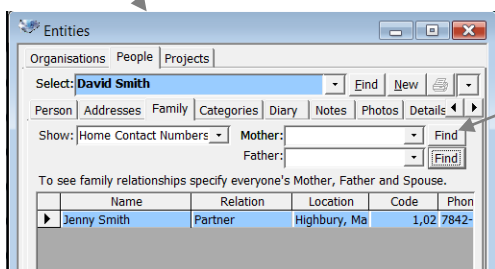
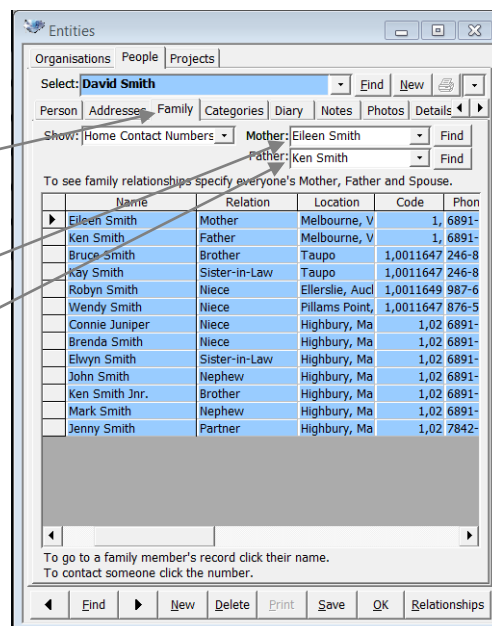
Exercise – Finding Someone's Parents

Display David Smith's **Family** Tab.

The system deduces and displays all of David's relatives that are in the system.

Now delete the names of his **Mother** and **Father**.

If you do of course all of his family apart from his Partner Jenny disappear.



Now use the **Find** Button to find his Mother. Given that his Parents are called 'Smith', of course, and they live in Melbourne. (You should

be able to do this on your own by now.)

When you do of course most of his family re-appears – apart from, obviously, his Father. But note his Brothers appear as only 'Half-Brothers' – because GEM doesn't yet know his Father.

Reselect Ken Smith from the Pull-Down List and everything's back to normal again.

