

# Customers and Suppliers Overview

Andrew

I need to create a PO for our suppliers, but we have hundreds in the system!

I don't know which one to use.

Man, this is going to take forever!

Robert

You can use the Customers and Suppliers views along with several search options to help make quick work of your search.

Pick a topic and I'll show you how.

## Topics

- Views and Search Criteria
- More and Options Buttons

## Views and Search Criteria

When you want information on a customer or supplier, use the Customers view or Suppliers view.

You can access both from the Views option in the Navigation pane.

Both views enable you to search and view information.

Use the search fields drop-down menus to narrow your search.

For example, the Look in drop-down fields enable you to search for specific types of customers or suppliers by group.

You can also select the branch or site from the Home Branch drop down.

When you choose Any, the system searches across all branches.

You can use the Find field to further define your search. The more text you enter, the more precise the search results.

Conversely, entering less text produces broader search results.

For example, when you enter baker in the find field, the search results show customers with the word baker in both the name and address fields.

You can also use the Boolean logic operators AND, OR, and NOT in your searches.

The system automatically applies the AND operator when you enter more than one word in the Find field.

If you want to use the OR and NOT operators, you must enter them using capital letters.

In this example, our search shows customers with either of the words Baker Or construction.

Conversely, you would use the Not operator to exclude data from your search. In this case, our search shows customers with the word Baker, but not the word Construction.

## More and Options Buttons

The system limits the number of search results it displays at one time based on the system option: Customer search page size.

When the number of matches exceeds this setting, the system displays a More button adjacent to the Go button.

Selecting the More button displays the next set of matching records.

The More button remains visible until you've reached the end of the list of matching records.

Use the Options button to determine how the system identifies matches.

When you select Match on Begins with, your search results display a list of matches that begin with the text you entered in the Find field.

The system stores the Begins with option and continues to use it until you change it.

It's a Best Practice to use the option: Exact Match first, Full Search If No Match.

In our example, the results include those customers that have an exact match with the text baker and those that have the same text elsewhere in a searchable field.

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