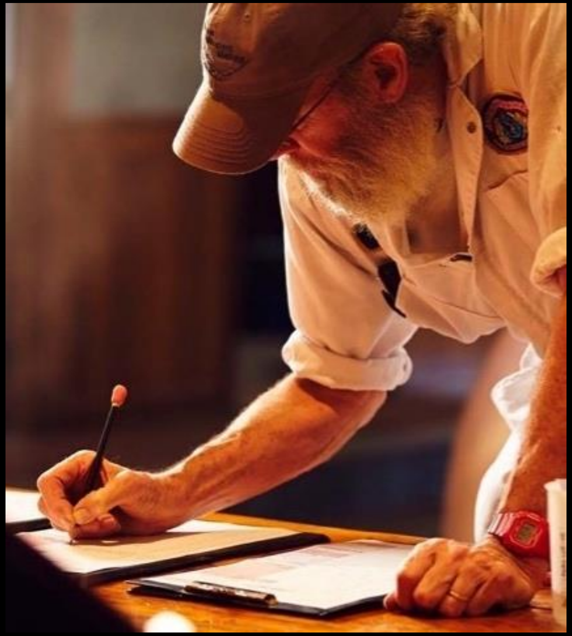
Filters and Search.

Michael Cox



Contents

Filters

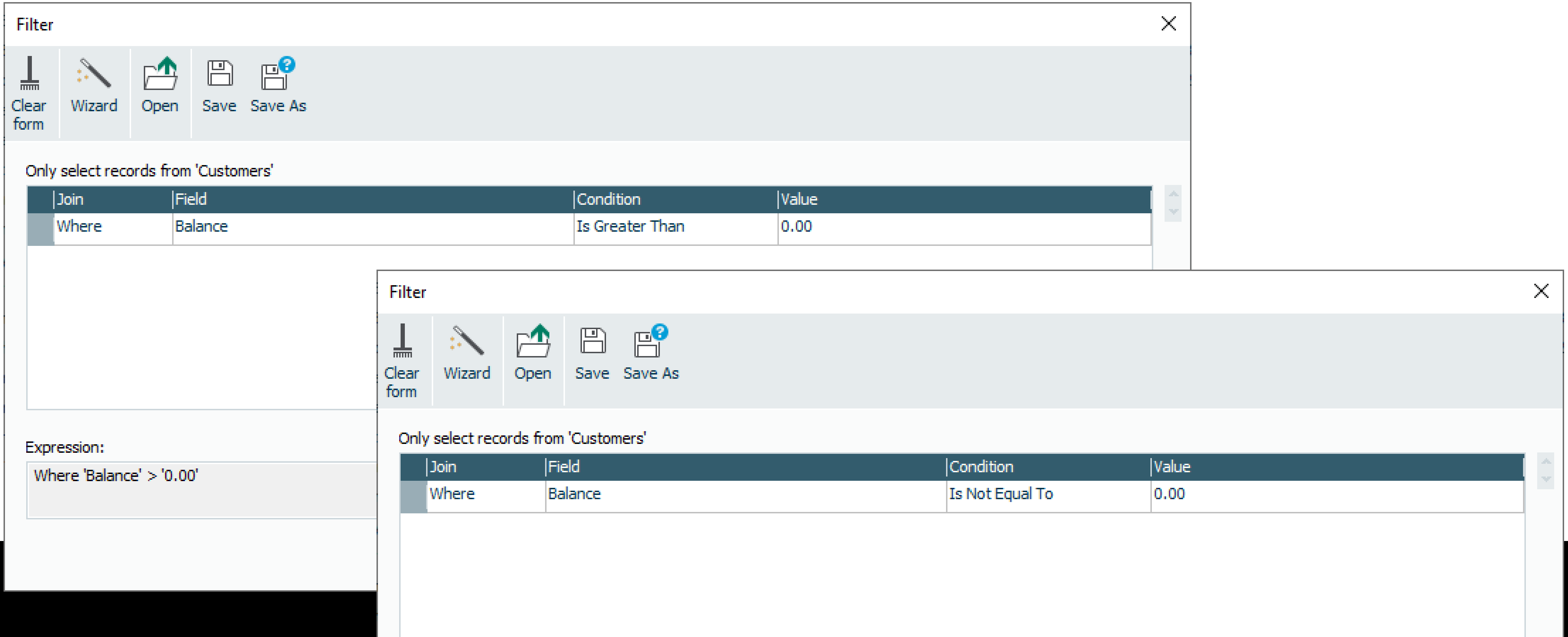
Why use a filters?

- To hide records
- To display specific records / transactions
- Filter option available in most areas, but not Bank accounts
- Export your results to Excel
- Wildcards can be used to search parts of a data field
- Reporting benefits
  - filter records before generating your report
  - useful if there's not a report available

Filters

Common filters

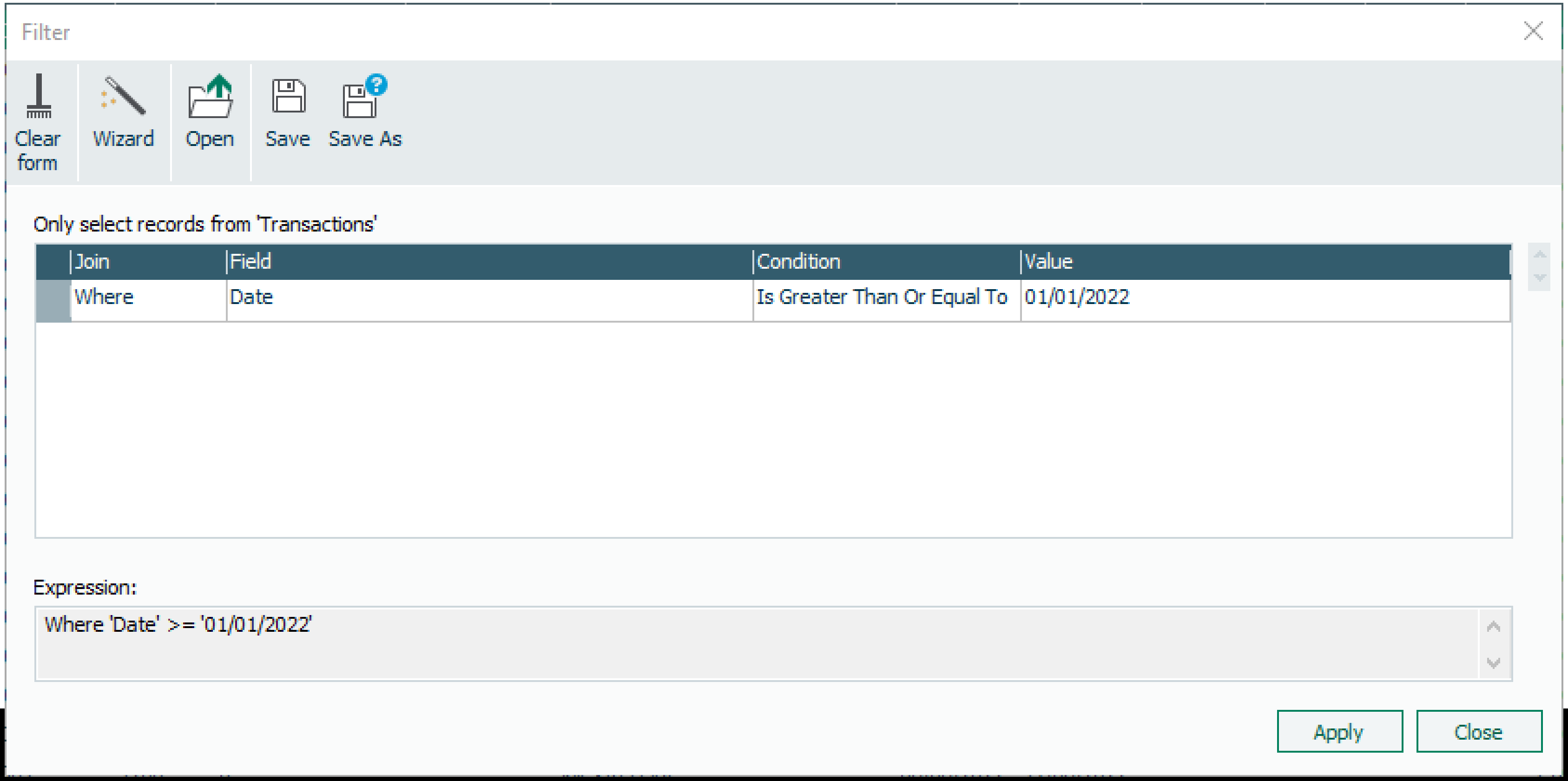
- Hide customers with a zero balance



Filters

Common filters

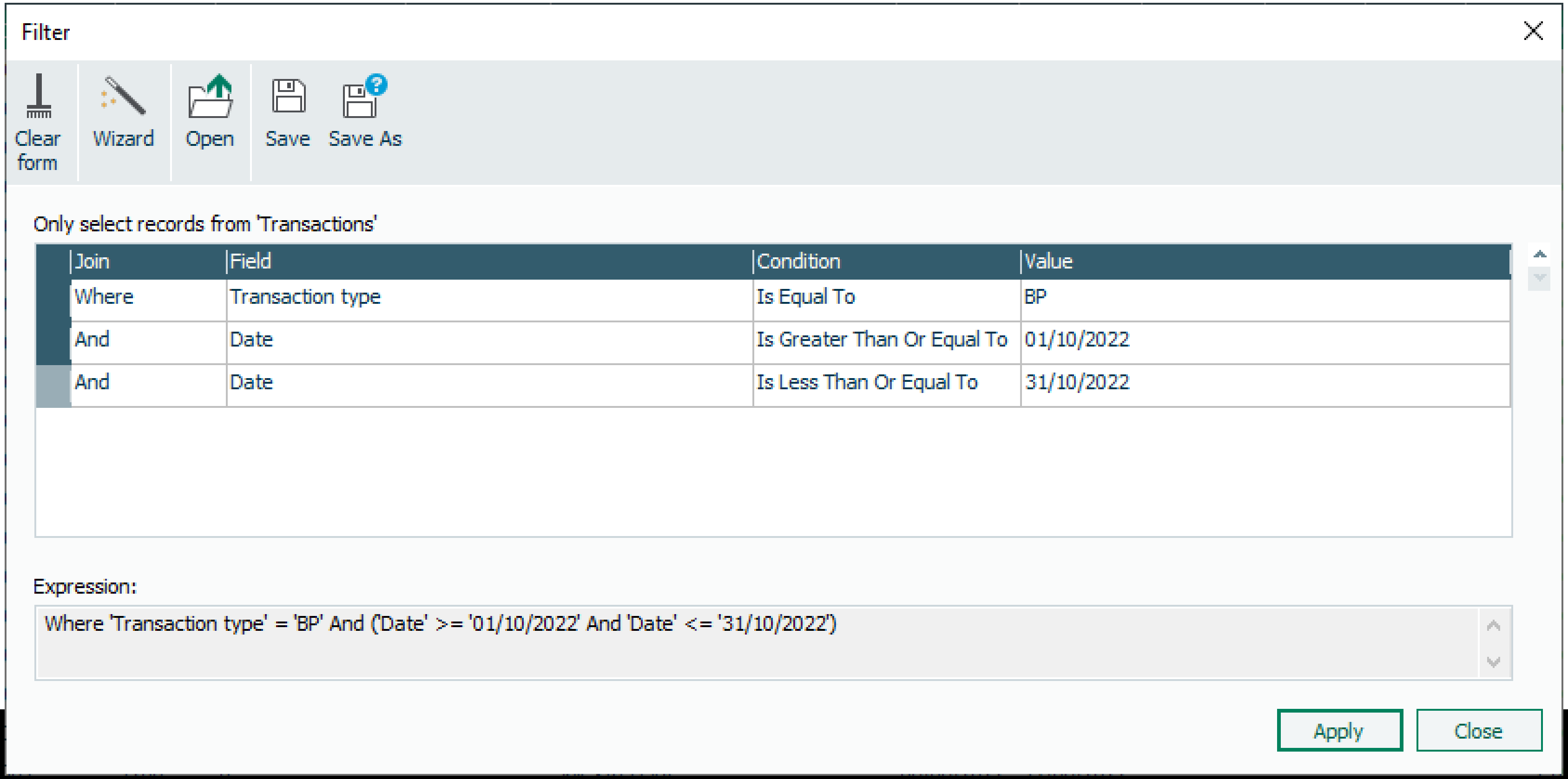
- Only show this years transactions on my audit trail



Filters

Common filters

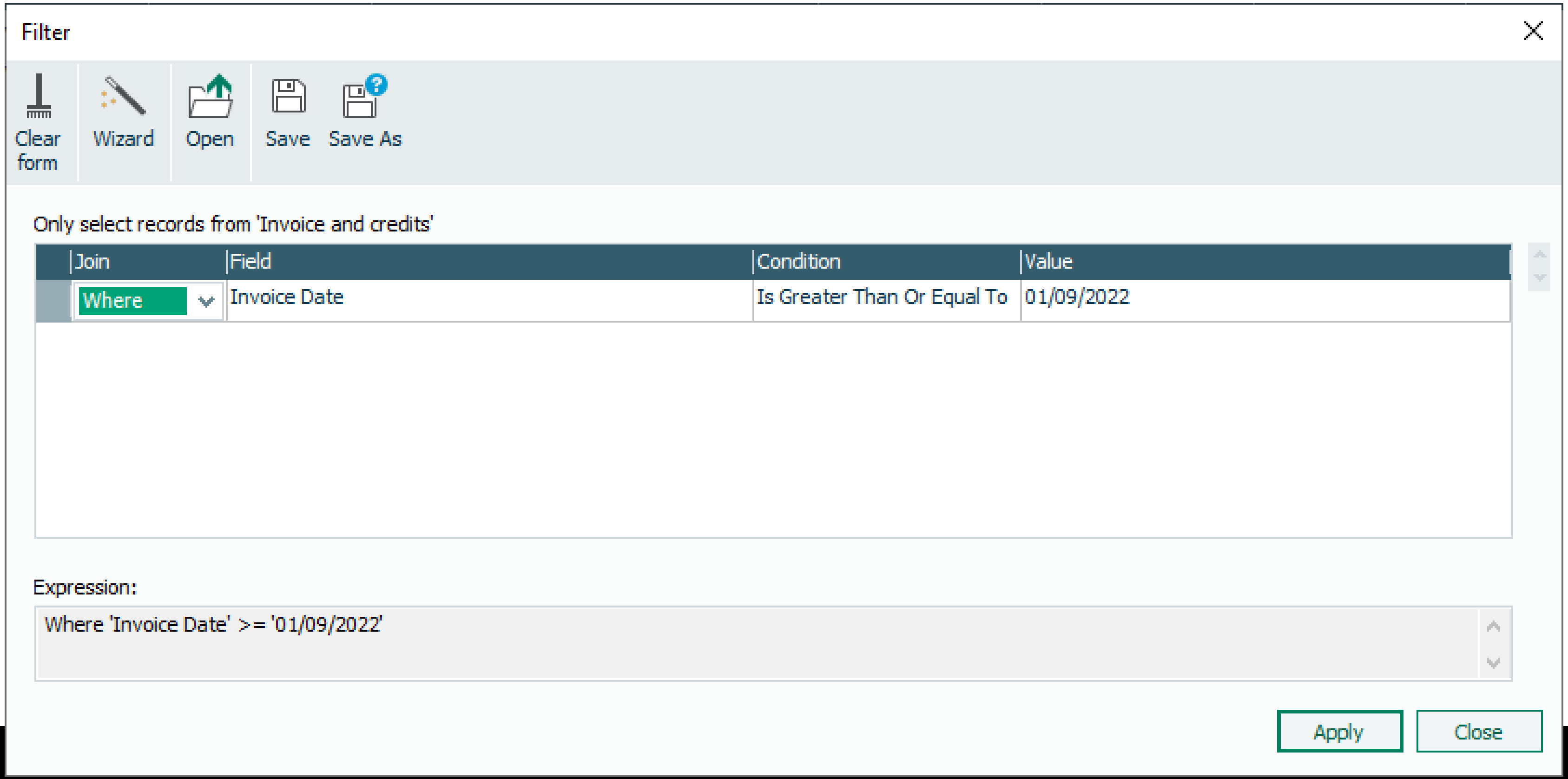
- Show only BP transactions for a specific period



Filters

Common filters

- Hide older invoices

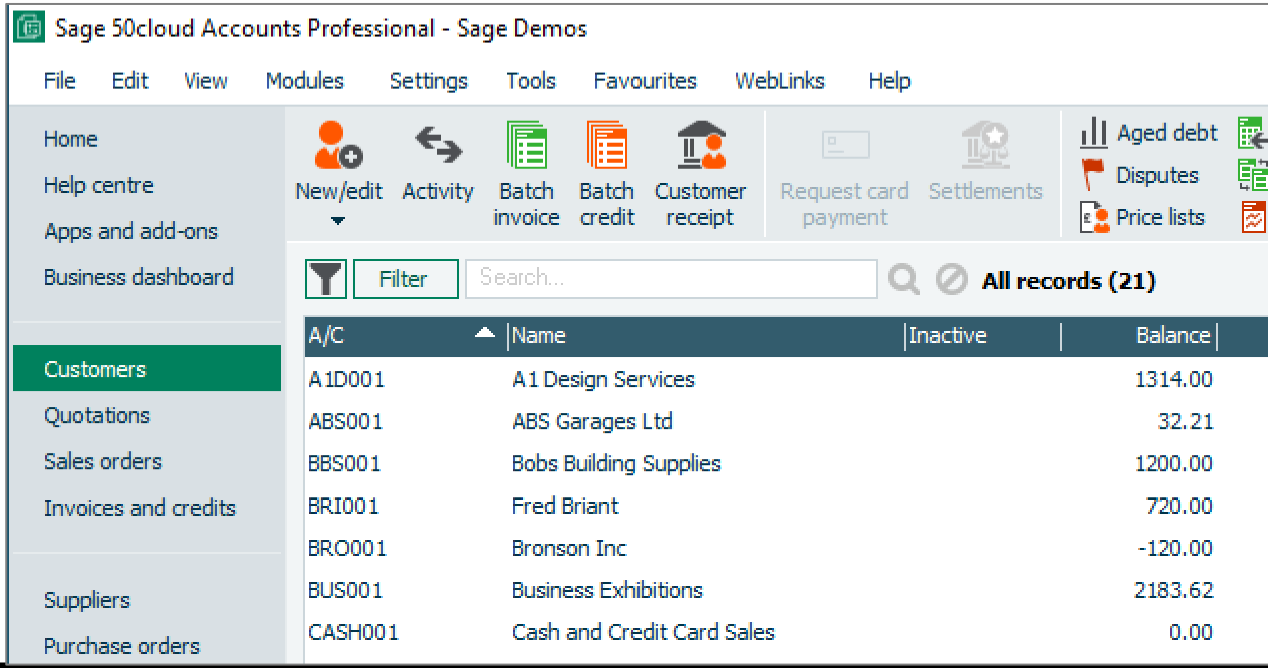


Wildcards

Wildcard	Use	Example
*	Represents any number of valid characters, including spaces. Position is important.	NE* N*1
$	Represents a specific line of text anywhere in the data.	$bottle
?	Represents a single character. Position is important.	41? 41??

Search

- Quickly search for specific text within records
- Searches multiple fields
- Ensure no filters are applied if using Search
- Wildcards can be used



Transactions

- Includes a Find option

Inactive records

Why flag records as inactive?

- Keeps your accounts tidy and easier to manage by hiding records you no longer use
- Customers / Suppliers / Nominal codes / Bank accounts / Products and services
- Alternative to deleting them
- Easy to flag records – but they must meet specific criteria

  Tip: Batch changes can be used to flag multiple records simultaneously – not in Essentials
- Option to show / hide inactive records in your ledgers
- Easily reactivate a record

Flag records as inactive | **Criteria**

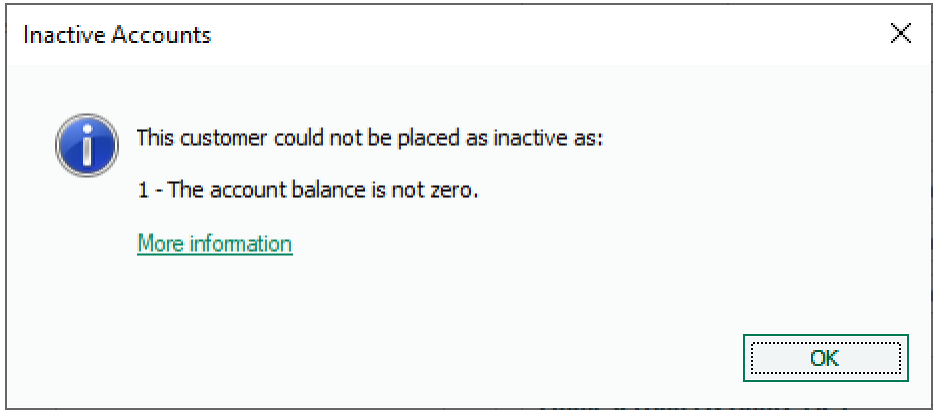
Inactive records

Customer criteria:

- Account balance must be zero
- No unallocated transactions
- No recurring entries attached to the record

  - Bank

  - Invoices / Orders
- Must not be the default Opayo (formerly Sage Pay) customer
- Your company must not be in recording mode – Accountant link enabled



Flag records as inactive

Criteria

Upcoming Webinars

Upcoming	Key Topics
VAT Return Report Designer Sage Membership Quiz CIS / DRC Month End	**Chart of Accounts** **Wednesday 9 November 2pm** We'll explain what the chart of accounts is, how to create new layouts or simply amend your existing one to help you report the way you want. **Management Reports** **Thursday 10 November 2pm** This session explains how the Trial Balance, Profit & Loss and Balance Sheet reports calculate.

Thank you!

Please take a minute to complete the short exit survey as you leave.

You'll receive a follow-up email with links to register for future webinars and watch recordings later today.