

PayBiz –How to Use the Search Facility

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Search Facility

All lookup screens have the search facility / button, and many other screens have a Filter button which provides some or all of the same functionality.

The search facility can be used to restrict a list view to include only a certain subset of the database. This reduced list can then be used for reporting functions, mail merge and pivot tables.

These procedures can apply to almost any screen/data in PayBiz, but here we will use the Debtor (also called Customer) Invoice Lookup screen as our starting point:

PayBiz main menu > Debtors > Debtor Invoices > Search button

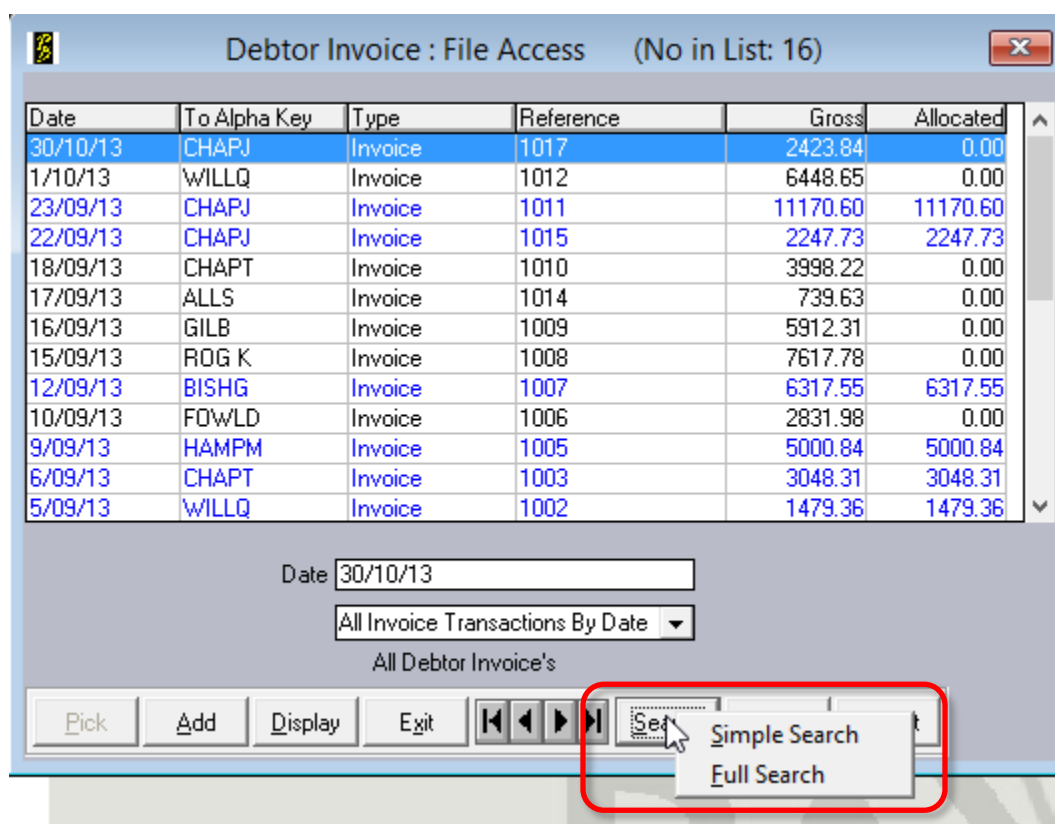
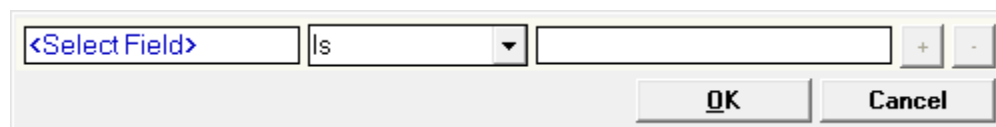


Figure 1: Search Facility

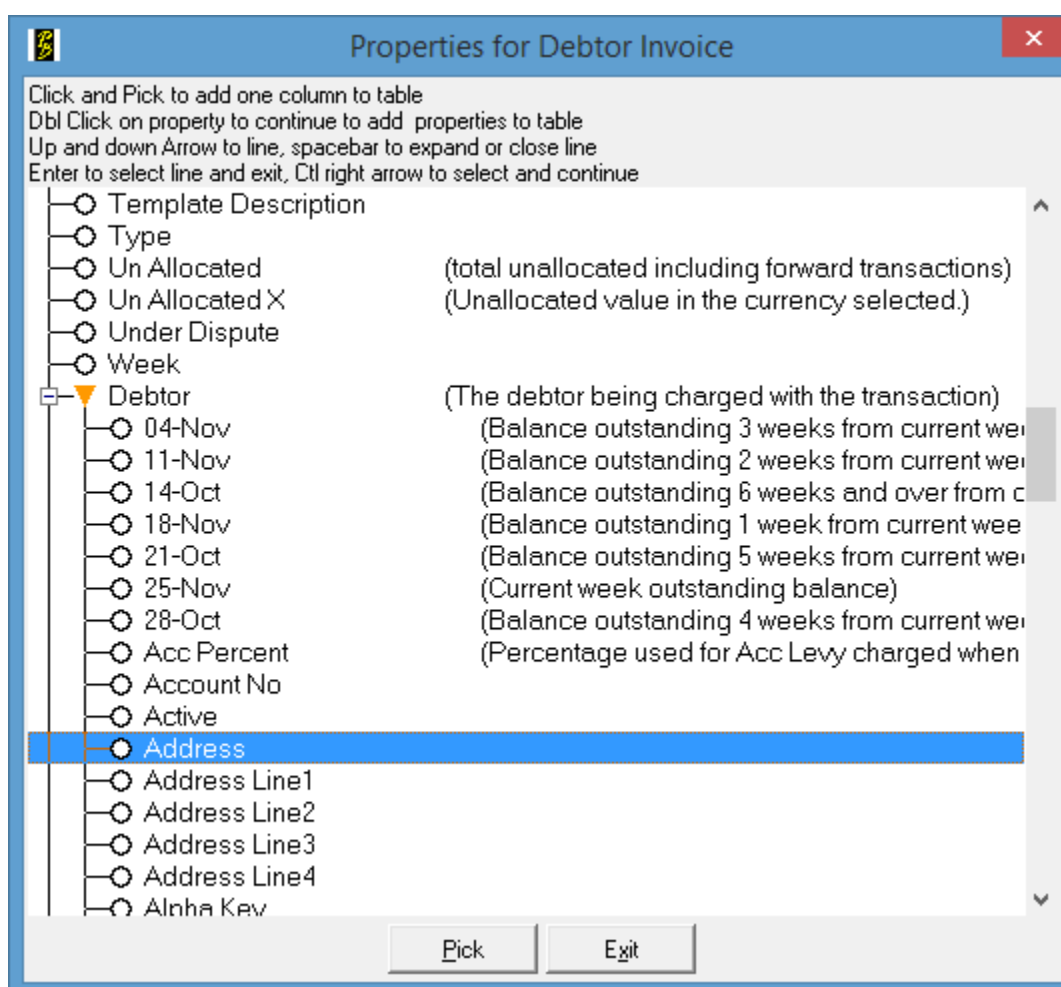
Simple Search



A simple search dialog box with a text input field containing "<Select Field>", a dropdown menu showing "Is", and a search button labeled "OK". There is also a "Cancel" button and a small "+" button next to the search field.

Figure 2: Simple Search

- Click in the <Search Field> box to display a list of **Properties for Debtor Invoice**.
- Pick the appropriate field. In this example we will use the Debtor Address.
 - Scroll down to the **Debtor** field and click on the + beside the orange triangle to expand the debtor properties.
 - Scroll down to **Address** and pick it:



A dialog box titled "Properties for Debtor Invoice" with a list of properties. The "Debtor" property is expanded, showing a list of sub-properties. The "Address" property is highlighted. The dialog box includes instructions at the top and "Pick" and "Exit" buttons at the bottom.

Click and Pick to add one column to table
Dbl Click on property to continue to add properties to table
Up and down Arrow to line, spacebar to expand or close line
Enter to select line and exit, Ctl right arrow to select and continue

○ Template Description	
○ Type	
○ Un Allocated	(total unallocated including forward transactions)
○ Un Allocated X	(Unallocated value in the currency selected.)
○ Under Dispute	
○ Week	
○ Debtor	(The debtor being charged with the transaction)
○ 04-Nov	(Balance outstanding 3 weeks from current week)
○ 11-Nov	(Balance outstanding 2 weeks from current week)
○ 14-Oct	(Balance outstanding 6 weeks and over from current week)
○ 18-Nov	(Balance outstanding 1 week from current week)
○ 21-Oct	(Balance outstanding 5 weeks from current week)
○ 25-Nov	(Current week outstanding balance)
○ 28-Oct	(Balance outstanding 4 weeks from current week)
○ Acc Percent	(Percentage used for Acc Levy charged when)
○ Account No	
○ Active	
○ Address	
○ Address Line1	
○ Address Line2	
○ Address Line3	
○ Address Line4	
○ Alpha Key	

Pick Exit

Figure 3: Properties for Debtor Invoice

- Select the Search Criteria. In this example we will use **Contains**.

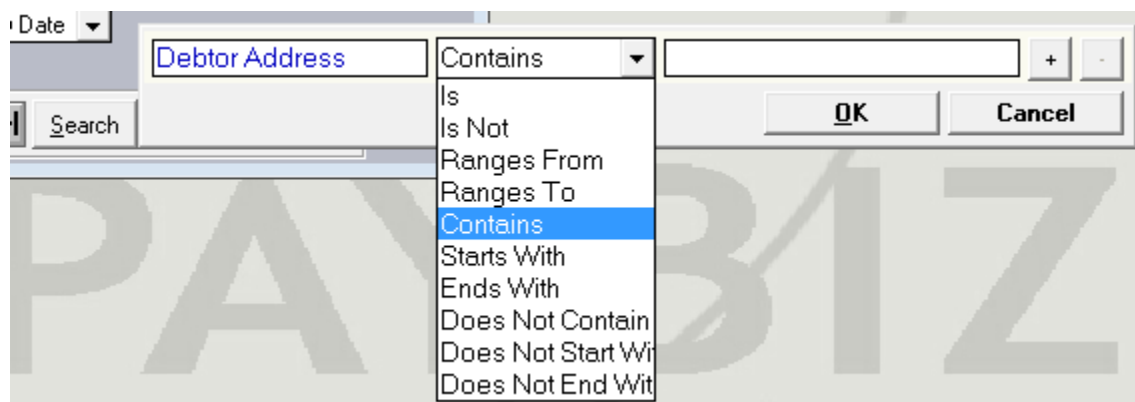


Figure 4: Search Criteria - Contains

- Enter the text you want to match on. In this case we will use TAPANUI:

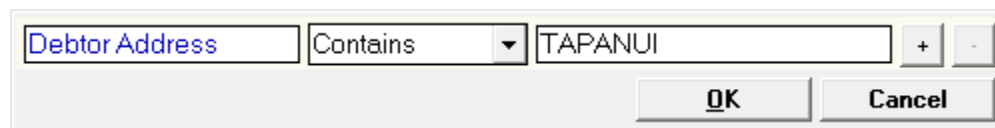



Figure 5: Search Text - TAPANUI

- Further search fields can be added by clicking the 

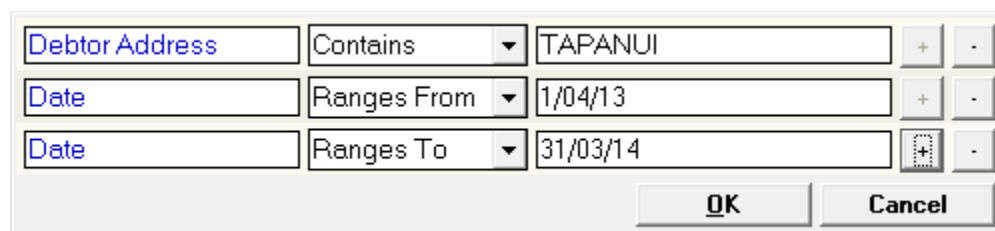
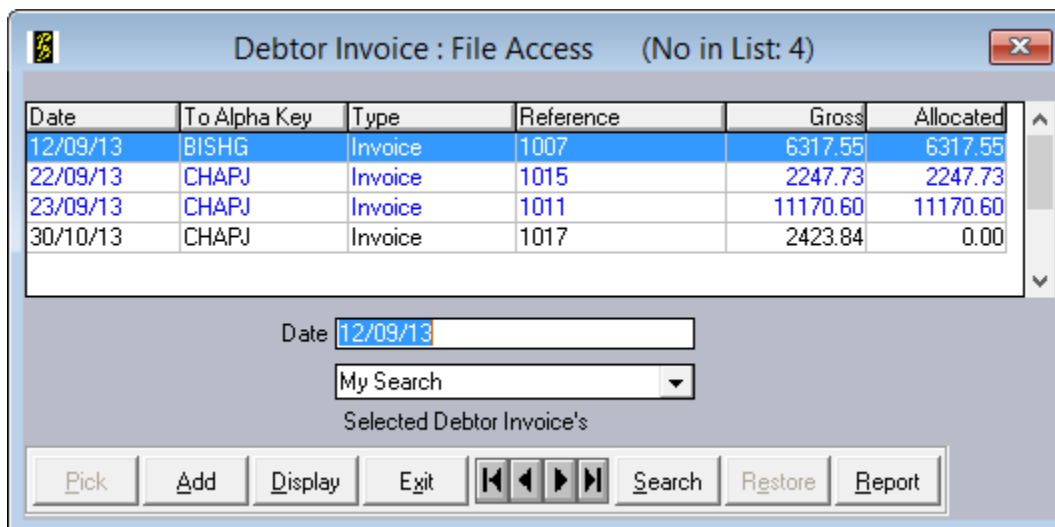


Figure 6: Extended Search Criteria

- Click OK to begin the search. A progress bar will be displayed, then the results will be displayed in the list view window:



Date	To Alpha Key	Type	Reference	Gross	Allocated
12/09/13	BISHG	Invoice	1007	6317.55	6317.55
22/09/13	CHAPJ	Invoice	1015	2247.73	2247.73
23/09/13	CHAPJ	Invoice	1011	11170.60	11170.60
30/10/13	CHAPJ	Invoice	1017	2423.84	0.00

Date: 12/09/13

My Search

Selected Debtor Invoice's

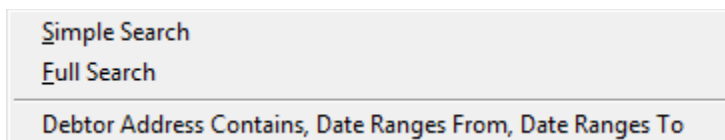
Pick Add Display Exit Search Restore Report

Figure 7: Search Results

- If a report or mail merge is required, click on the **Report** button and set up as required.

Notes:

- With a **Simple Search** ALL the report criteria must be met. ie using the example above, the system will find all debtor invoices where customer is in Tapanui AND the invoice date is within the specified date range.
- To be able to use an OR rather than AND you will need to use a **Full Search** (see next section).
- A handy feature is that when you next click on the **Search** button it will show the last 5 searches performed by your user ID. This means you can easily find your previous searches, adjust them if necessary and run them again.



Simple Search

Full Search

Debtor Address Contains, Date Ranges From, Date Ranges To

Figure 8: Saved Search

Full Search

For this we are going to search on Employee.

PayBiz main menu > Payroll > Employees > Search button

Selecting Full Search opens the Search/Enquire screen.

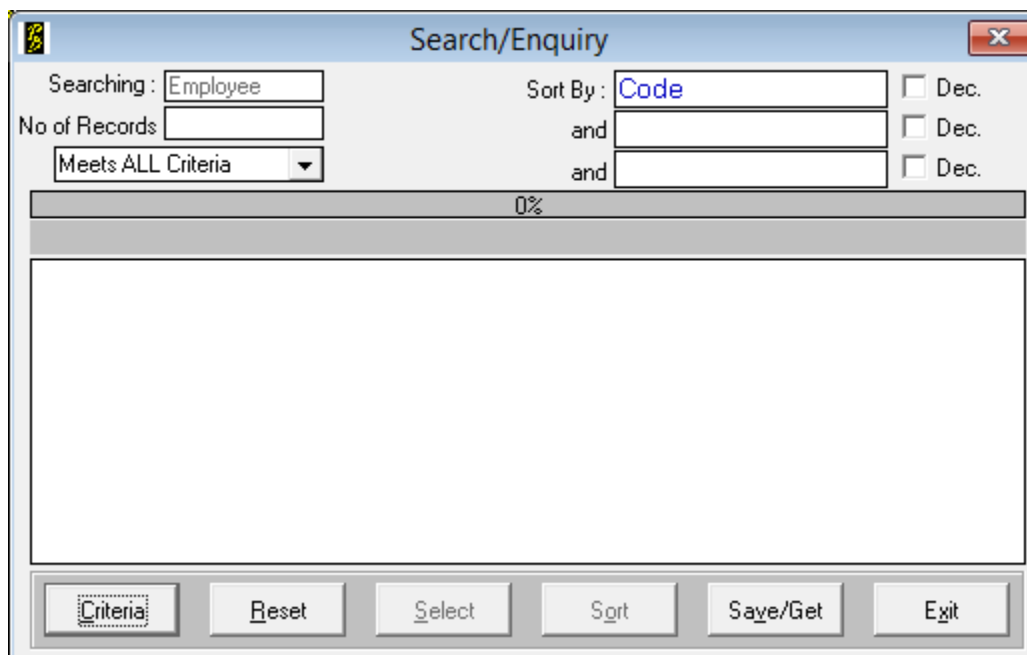


Figure 9: Full Search screen

We will look for all shed staff (shearers, shedhands and pressers) who have a base rate variance entered.

This search cannot be achieved using a single simple search because a simple search would look for staff where employee type is Shearer AND Shedhand AND Presser. Employees can have only 1 employee type, therefore no matches would be found.

- Click the **Criteria** button. This will open a blank Employee screen, with these buttons at the bottom:

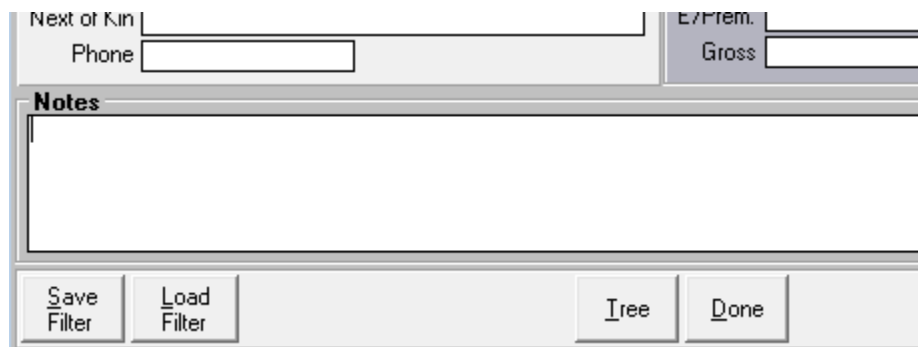


Figure 10: Criteria Options

Button	Description
Save Filter	Click to save the Search Criteria so you can use the filter again.
Load Filter	Click to load a previously saved Search filter.
Tree	Opens the full list of Employee Properties to pick from (see above). This allows you to use fields that may not be on the Employee screen such as the current Month's gross or perhaps the Payshr Code.
Done	Click to complete the criteria selections.

To find shed staff, we need to use the **Employee Type** field.

We could get this using the **Tree** button, and picking the Employee Type from the property list, but we will use it directly off the screen.

- Click on the **Rates** tab then click in the **Type** field.
This opens the **Search Criteria for Employee Type** window:

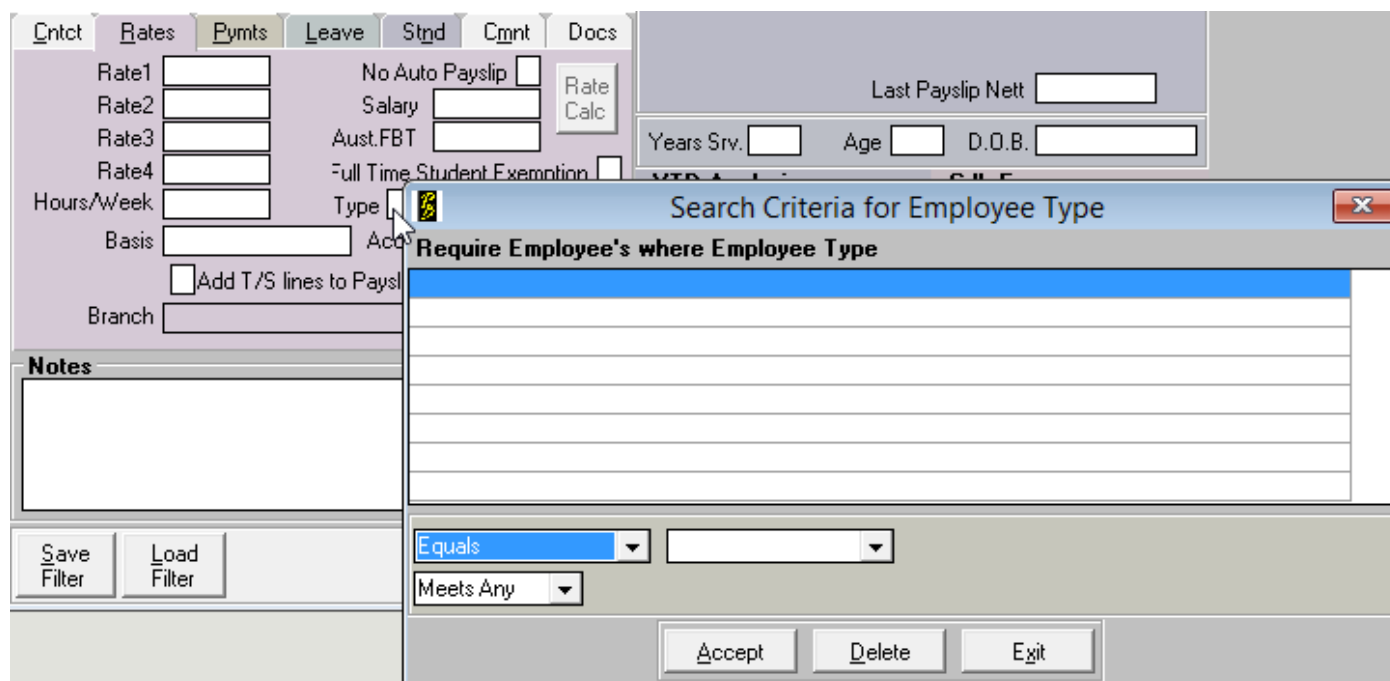


Figure 11: Search Criteria for Employee Type

- Leave the drop down box on **Equals**.
- Click on the next drop down box to display the Employee Types configured on your system. We will choose **Shearer**.
- Leave the last drop down box on **Meets Any**.
- Click **Accept**.
- Repeat this process for the other desired employee types. In this example we will also add **Shedhand** and **Presser**:

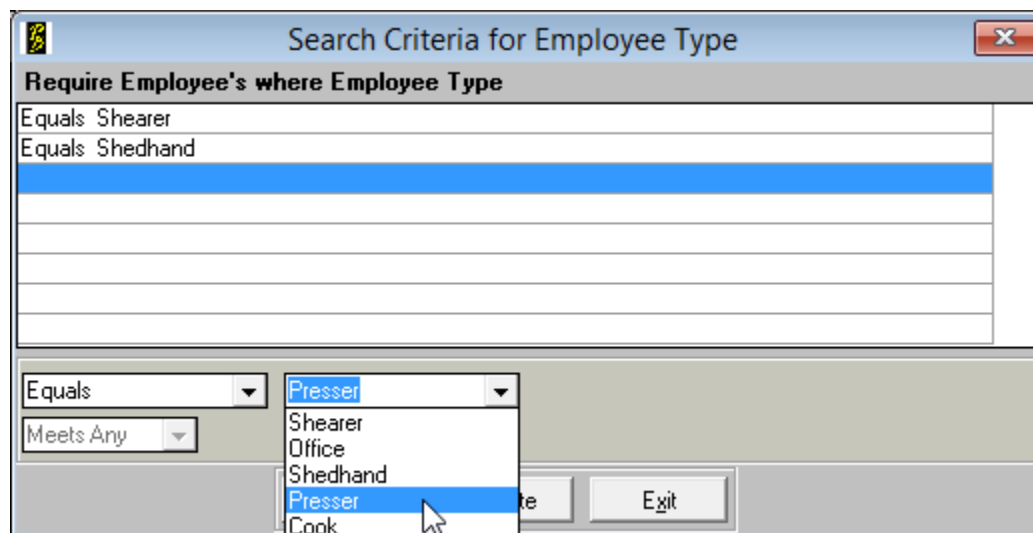


Figure 12: Adding Employee Types

- After clicking **Accept**, click **Exit** to close the window and return to the Employee screen. You will notice the **Type** field is now yellow. This shows there is criteria entered into this field.
- Now, click in the **Base Rate Variance > Value** field to add criteria.
- Change the first drop down box to be **Not Equal To**:

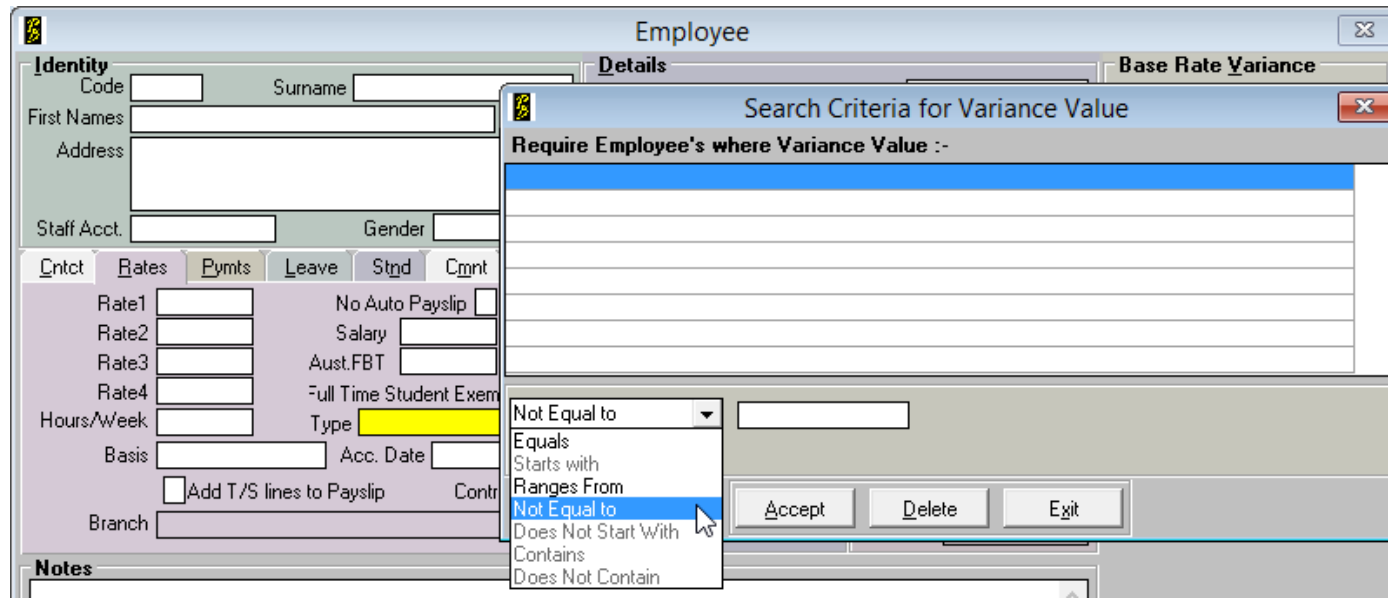
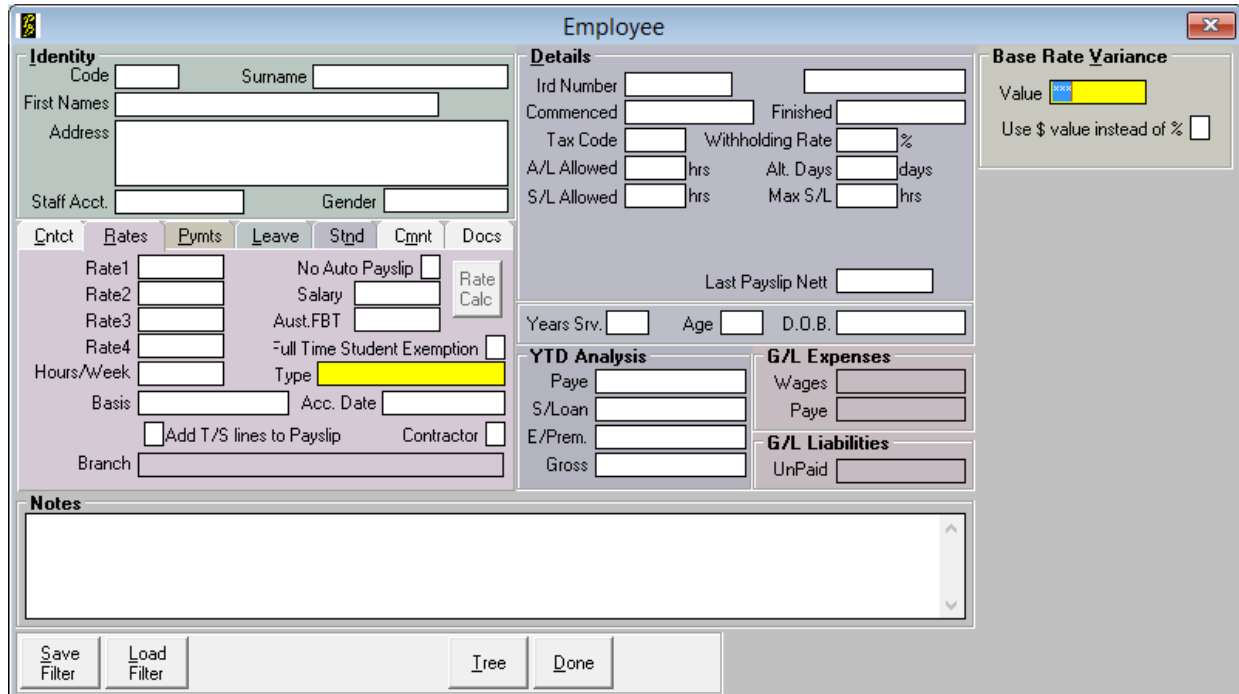


Figure 13: Employee Type has Criteria Entered

- Enter 0 (zero) in the next field. Click **Accept** then **Exit**.

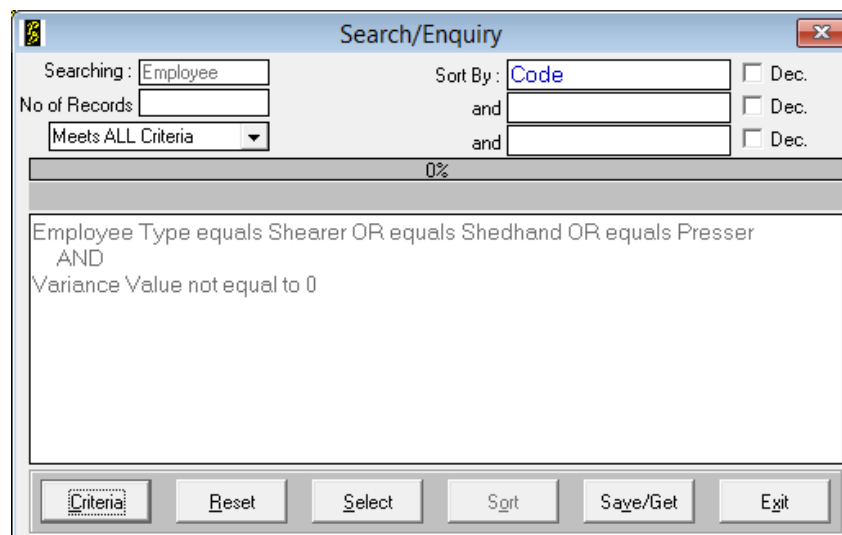
- The Employee screen now shows 2 yellow fields:



The Employee screen is a complex form with multiple sections. The 'Identity' section includes fields for Code, Surname, First Names, Address, Staff Acct., and Gender. The 'Details' section includes fields for Ird Number, Commenced, Finished, Tax Code, Withholding Rate, A/L Allowed, Alt. Days, S/L Allowed, and Max S/L. The 'Base Rate Variance' section includes a Value field and a checkbox for 'Use \$ value instead of %'. The 'Rates' section includes fields for Rate1, Rate2, Rate3, Rate4, Hours/Week, Basis, and Branch. The 'Paymts' section includes fields for No Auto Payslip, Salary, Aust.FBT, Full Time Student Exemption, and Type. The 'Leave' section includes a field for Last Payslip Nett. The 'Std' section includes fields for Years Srv., Age, and D.O.B. The 'Cmnt' section includes fields for Paye, S/Loan, E/Prem., and Gross. The 'Docs' section includes fields for Wages, Paye, and UnPaid. The 'Notes' section is a large text area. The 'Criteria' section is highlighted in yellow and includes fields for Rate1, Rate2, Rate3, Rate4, Hours/Week, Basis, and Branch. The 'Criteria' section is highlighted in yellow and includes fields for Rate1, Rate2, Rate3, Rate4, Hours/Week, Basis, and Branch.

Figure 14: Employee screen showing fields with Criteria entered.

- More criteria can be added if desired. Ie to only return active staff, add a criteria for the **Finished** field where the value is **Equal To** then leave the criteria field blank to find staff who do not have a Finished date entered.
- Once finished entering criteria, you can click on **Save Filter** to save the search criteria for future use, then click **Done** to return to the **Search/Enquiry** screen. This now shows the selected criteria:



The Search/Enquiry screen displays the search criteria entered in the previous screen. The 'Searching' field is set to 'Employee'. The 'Sort By' field is set to 'Code'. The 'No of Records' field is set to 'Meets ALL Criteria'. The search results are displayed in a list box, showing 'Employee Type equals Shearer OR equals Shedhand OR equals Presser AND Variance Value not equal to 0'. The 'Criteria' button is highlighted in yellow.

Figure 15: Search/Enquiry screen

Field	Description
Searching	Displays the class being searched on.
No of Records	Shows the No of Records returned after clicking Select .
Meets ALL Criteria	If a number of criteria are being added, you can select from the drop-down list whether the search must Meets ALL Criteria (AND) or includes records Meets ANY Criteria (OR).
Sort By and	Click to open the property list to pick the field on which to sort the results. You can add up 3 properties to sort on in order of preference, ie you might want to sort initially on Employee Type, then on Code.
Dec	Tick to sort this property in Descending order.
Large text box	Displays the search criteria entered.
Criteria	Click to add or edit the search criteria.
Reset	Click to undo the Select and remove the application of the search criteria so that the No of Records will now include ALL records on the original list view.
Save/Get	Click to save/retrieve the search for later use. <i>Note:</i> <ul style="list-style-type: none"> You will rarely ever want to reuse a search, as this will not find any new records that have been added after you did the original search. Use the Save Filter option in the Criteria screen to save the search criteria for later use.
Sort	Click to apply the sort order.
Exit	Click after the Select button to display the returned results in the list view. You will be prompted if you wish to save the search. If you click Yes, the Save/Get dialog box will open allowing you to save the search results. You can now use the Report button to create a report, mail merge etc for the returned results.

Note:

- Just like the Simple Search, the last 5 full searches are saved for your user ID for quick access:

Simple Search
Full Search
Employee Type Is, Employee Type Is
Employee Type equals Shearer AND Employee Type equals Shedhand AND Employee Type equals Presser AND

Figure 16: Saved Searches