How to find a Company / Contact Record

Refers to:
Companies button
Select (Top menu) → Companies.
F5 (Function key)

By default the Companies are displayed. To search by Contact, select the Contacts (or Company Person) button. To see a list by other criteria such as state, use the Search Tab.

To find an existing Company type the first few letters of their keyname into the box and press the Find button or press Return. Companies with keynames matching will appear in the table below. You can use wildcards. To see the list in a different order click the table column heading to sort by that criteria.

You can **expand the Company record** by:

- Double-clicking on their row in the table,
- Select the row with the mouse or keys and then pressing the Expand button or press Return.

When in a Company Record it is possible to step through the selection with the video buttons.

From the Company Selector form you can:

- Run Searches using standard and questionnaire criteria, also free text searching.
- Save, Store and modify selections of people.
- Store Searches for recall for future use.
- Run Reports on the selection
- Mailmerge to Contacts by letter, email and text message.

See also
Keyname look-up.

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