

# Finding Records



No matter what we want to find, a work order, staff, invoice, customer, location, or the use of a single product - the process is the same. One of PestaRoo's greatest strengths is the ease with which it lets you find records. You'll come to love it for this feature alone!

## Overview

The beauty of having a fully relational database, FileMaker Pro, behind PestaRoo is that you can find nearly anything anytime anywhere. Wow! And with no programming of "queries". A few general comments about finding records is appropriate. These instructions will work for any table in our system, on any layout. Fields that can not be used for Finding will not let you click into them.

## Find Mode

Most layouts have a generous set of buttons that do this for you. They are usually called "Choose Customer" or "Choose Location" or something like that. But if such a button is not visible, just press Control-F (Command-F on Macs) to enter Find Mode. Another way to get to Find Mode is the small pop-up menu in the lower left of your screen (it normally says browse).

## Quick Finding

From within Find mode, Type the first several letters of whatever you are searching for in a field. Press the Enter key in the lower right hand corner of your keyboard to preform your request. (Note: On most Windows machines the Return key is also labeled "Enter" even though it does totally different things.) Pressing "Enter" Performs your Find request and takes you to Browse mode where you can edit your

record. The key here is that we want to type as little as possible to quickly get to the record we want. For example, if you have a customer named "Robbie" you might want to type, "rob" just in case his real name is "Robert".

## Duplicates and Data Hygiene

If you don't find a record that you are looking for, try again from a different slant. Maybe search by address, or city. Good data hygiene dictates that you should NEVER put a new record into the system unless you have looked for a previously existing one in at least three ways. If you put in a duplicate record in a database, it causes everyone grief. Please be a good database citizen and take care to search thoroughly before adding new records! You don't want 7 records for the same John Doe. You should know that all created records are automatically stamped with date, time, and user. Finding records in PestaRoo is so easy you don't need to risk putting in duplicates.

## Complex Finds

You can search several fields at the same time. For example, if you are searching for a customer on the data entry layout, type in the first couple letters of the first name in the **first name** field, and a couple letters of the last name in the **last name** field. And if you want, type the first letter or two of his **city**. When you press, "Enter" PestaRoo will perform all of these requests at the same time. It is amazing how fast one or two letters in the **first name**, one or two letters

in the **last name**, and one or two letters in the **city** will narrow down your search.

If you are searching for a date in a date type field, you have to type in a full valid date. Usually it is best to search in date fields by only entering numbers with slashes. In other words, you can't type in "March" to find all March records. But, you can easily find a range of values by typing Value1, then three periods, then Value2. For example, "3/1/2001...5/31/2001" would find all values for March, April, and May. (Don't type in the quote marks.) This is called "Searching by Range. You can "Search by Ranges" in number fields, date fields, and even text fields. But, Text field ranges get a little weird.

## Tricks with Finds

If you are in Find Mode and you type an equal sign in a field and then perform the find, you will get all the records that have no value in that field. Cool! This is a great way to find all Customer records that are missing some piece of data. If you are in Find Mode and you type an exclamation point sign in a field and then perform the find, you will get all the records that have a duplicate in that field. Also cool!

Here is another new fun trick. Lets say you are in Customers and you are looking at a Customer in specific city. And you want to see everyone else in that same city. While still in Browse mode, just right click on the **city** field and select 'Find Matching Records'. And there they are! Easy. You also can use this trick with a constrain to the found set. That way you could find all customers in specific city that have a status of current. Neat!

## Refind

After you perform a find, you can go BACK to that request by pressing Control-R. (Command-R on Macs). This is very handy when searching for names. Lets say you were looking for Mike Williamson. You typed "M

W" into a **full name** field in Find mode. When you pressed Enter you got 100 records. Yikes! You really don't want to scroll through that many records, so you Press Control-R to revisit your request. Here you add a couple more letters, say, "Mik Will" and press Enter again. Success! This time you now only have a couple records to look at and choose between. Control-R is a wonderful keyboard shortcut. But remember, it only works from browse mode.

## Multiple Finds at Once

Here is another neat trick: Lets say you want to find all Customers in two cities for a post card mailing. You go to the Customer Data Entry screen and enter Find mode. Navigate down to the field **city**, and type in the first city. Then, press Control-N (Command-N on Macs). This makes a new Find Request on top of your first request. Now you can type in your second city and press Enter. Viola! You now have all Customer records for both cities. Caution: This is a neat trick, but you should be aware that Control-N does different thing in each mode that FileMaker may be in. And FileMaker has four modes! So be careful to be in Find mode before you use this command!