



Searching on Text User Fields

To view all the projects belonging to a specific rep you can use the search feature.

To do this, open Trackbase Pro at the Project screen and click on the Search button  on the top toolbar. This will open the search window shown below.



The screenshot shows a window titled "Trackbase Pro" with a search interface. The window has a blue title bar and a red close button. The search area is titled "Search" in red. It contains the following elements:

- A dropdown menu labeled "Which field are you trying to identify the record by?" with a blue selection.
- A dropdown menu labeled "What type of match are you looking for?" with a white selection.
- Two text input boxes labeled "What are the values you are trying to match?".
- A checkbox labeled "Save this search" which is unchecked.
- A "Name:" label followed by a text input box containing "New Search".
- A "Desc:" label followed by a text input box with up and down arrow icons.
- "OK" and "Cancel" buttons at the bottom.


In the first box of this window, select the field you wish to search under, in this example we will choose 'Rep Name'.

Next, choose the match type in the middle box and as we are searching for text like a persons name we will choose 'Like'.

Finally enter the text you wish to search for. We will search for our rep 'Marsha Klein'.

Click on 'OK' to start the search.

You will then be prompted to choose which age of projects you wish to view. Click on 'OK' to continue.

To look at the most recent projects attached the 'Marsha Klein', click on the 'View New and Updated' button  on the top tool bar.

You will then see a list of Marsha's projects for this week, as shown below:

TITLE	VAL	CONTACTS
HOUSING	£3,56	
OFFICE/FLATS	£10,0	
HOUSING	£2,00	
ROAD/BRIDGE/ENVIRONMENTAL IM	£70,0	
POWER	£70,0	