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Tips and Techniques Newsletter

Three CSI SyteLine Tricks You'll Love
Trick #1

If you've been using CloudSuite Industrial/SyteLine 9 or 10 for some time you probably think you know all the tricks of the User Interface. Here's a few that you may already know, but if not these can make your life easier.

I'm going to cover three tricks in the next few weeks:
- Date Lookup by Partial Match
- Changing your Menu Theme for a more useful menu
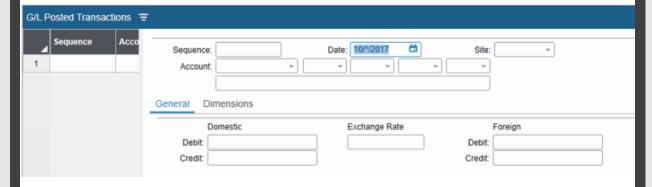- Pressing buttons without the mouse

Date Lookup by Partial Match.

You may often need to find a group of transactions that occurred in a given month. This could be customer order lines, or GL Posted Transactions, or posted invoices. Any transaction that has a date field.

Rather than go to a query form and build a query with a beginning and ending date, here's a quick trick that will let you filter on the form for all the transactions in a specific month.

I'll use the G/L Posted Transactions form as an example. I want to find all the General Ledger posted transactions with a date in October of 2017.

Rather than go into the Query Form (Cntrl-Q) and building a query statement, just go into filter in place (F4) and enter this into the date field: "10/*/2017".

G/L Posted Transactions		
Sequence	Acco	
1		

Sequence: [   ]   Date: [10/*/2017] 📅   Site: [▾]
Account: [▾] [▾] [▾] [▾] [▾]
[   ]

General   Dimensions

	Domestic	Exchange Rate	Foreign
Debit:	[ ]	[ ]	Debit: [ ]
Credit:	[ ]		Credit: [ ]

Then hit F4 again to execute the query.

SyteLine will return the rows for transactions for October 2017.

Keep an eye out next week for Tip #2: Changing your Menu Theme for a more useful menu.

If you have any questions regarding your CSI (SyteLine) System, do not hesitate to give us a call. Your success is very important to us.

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