

## DAD 2.0 Desktop Search

**Basic Search Criteria**

**Search Criteria**

Client ID

Client Number

First Name

Last Name

Organization

Home, Work, Or Alt Phone

Zip

Service Request ID

Service Request Number

Match On

Sounds Like

The Desktop Search has been updated and now the results are contacts that can either be selected to be clients. If the search results do not contain the contact being searched for, a new client can be created from the Action dropdown menu. If you wish to edit the search criteria from the results view, the double arrow show/hide button will reveal the original search criteria and allow for editing and searching again.

The Match On option allows for matching on Any Criteria or All Criteria for more specific searching.

The Sounds Like option allows for close spellings to be displayed in the results and can be selected based on the degree of closeness.