# Searching

Enter the name of a contact, company, matter etc in the search box at the top of the screen to quickly find the record:



The search box runs a key word search across OnePlace so will return multiple types of records. Click the relevant type from the list on the left to display only matters or contacts etc.

You can also use the filter icon to sort the data by a column header 

Alternatively, select a tab to view contacts, companies, lists etc. Each tab shows items you’ve recently viewed or edited.

At the top of each tab you will see:

## **List Views** drop down which shows you available list views (searches)



## A set of action buttons:

*  to create a new contact, company etc depending on the selected tab
*  to create and edit new list views or select fields to display on a view
*  Display menu
*  Refresh
*  Edit (available on certain views)
*  Charts (available on certain views)
*  Filter (available on certain views)

#  Viewing Contacts

You can quickly find recently viewed contact, newly added contact and other lists set by your firm.

## Click the **Contacts** tab

## Make a selection from the list views drop down



## Reorder the list by clicking on a column header, the first click sorts Ascending 🡩, the second click reorders Descending 🡫



## Click a contact’s name to view full details

When viewing a contact, you will see the following information available:



**Key contact details** are displayed at the top of the page.

**Action buttons:**

* **Follow** the contact on Chatter
* **Edit**
* **Change Company** (under drop down arrow) – update the company this contact works for

**Tabs:**

* **Details** – shows full contact details, contact preferences and marketing activity summary
* **Related** – shows you other companies the contact is linked to, other addresses recorded, lists, functions and publication information
* **Relationships** – allows you to view and create relationships with this contact
* **Areas of Interest** - can be populated by users or by the contact directly using emarketing integration
* **Data Quality** – shows potential duplicates and a Data Verification tool available subject to a licence
* **Activities** – record new activities. View and filter existing activities
* **Chatter –** comment on this contact – comments will be pushed to other users following this contact but visible to anyone viewing the record

# Creating a new List View

## Select the tab you want to create a list view within e.g. Contacts, Companies etc

## Click the  button and select **New**

## Enter a name for the list view

## Determine who can see the list view (only you or all users)

## Click **Save**

## In the Filters section on the right hand side click the **Show me** panel and select **My Contacts** or **All Contacts**

## Click **Add Filter** and select the **Field**, **Operator** and **Value**

## Click **Done**

## Click **Add Filter** to enter further criteria

## Click **Save**

## Click **Add Filter Logic** to specify if each criterion should be separated with AND or OR

Note: AND v OR

For conditions where each criteria must be satisfied, choose AND

For conditions where any criteria can be satisfied choose OR

## Click the  button to **Select fields to Display**; then click **Save**