

Figure 1: Searching by code

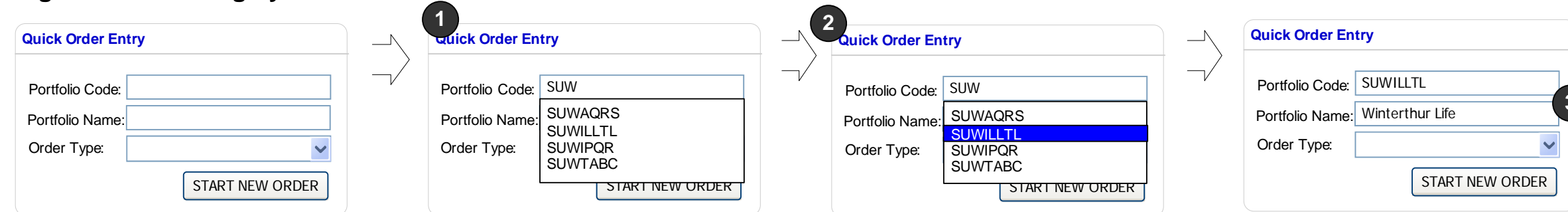
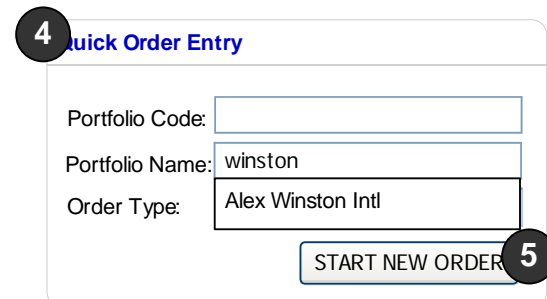


Figure 2: Searching by name



The “Quick Order Entry” and “Quick Query” box feature autosuggest functionality, which make it possible to search by code or name and see a list of matches all in the same box.

- 1** To search, user simply starts typing. Matches are populated in a dropdown.
- 2** The user can mouse down to select the correct portfolio, or just keep typing. As she types, the portfolio list is continuously refiltered to match what she has entered.
- 3** When Portfolio Code is entered, Portfolio Name defaults (and vice versa).
- 4** Partial name searching is supported. (Search will automatically insert wildcards at beginning and of the string.)
- 5** Clicking the “Start New Order” button redirects to the order entry screen for the selected order type with client details pre-populated.