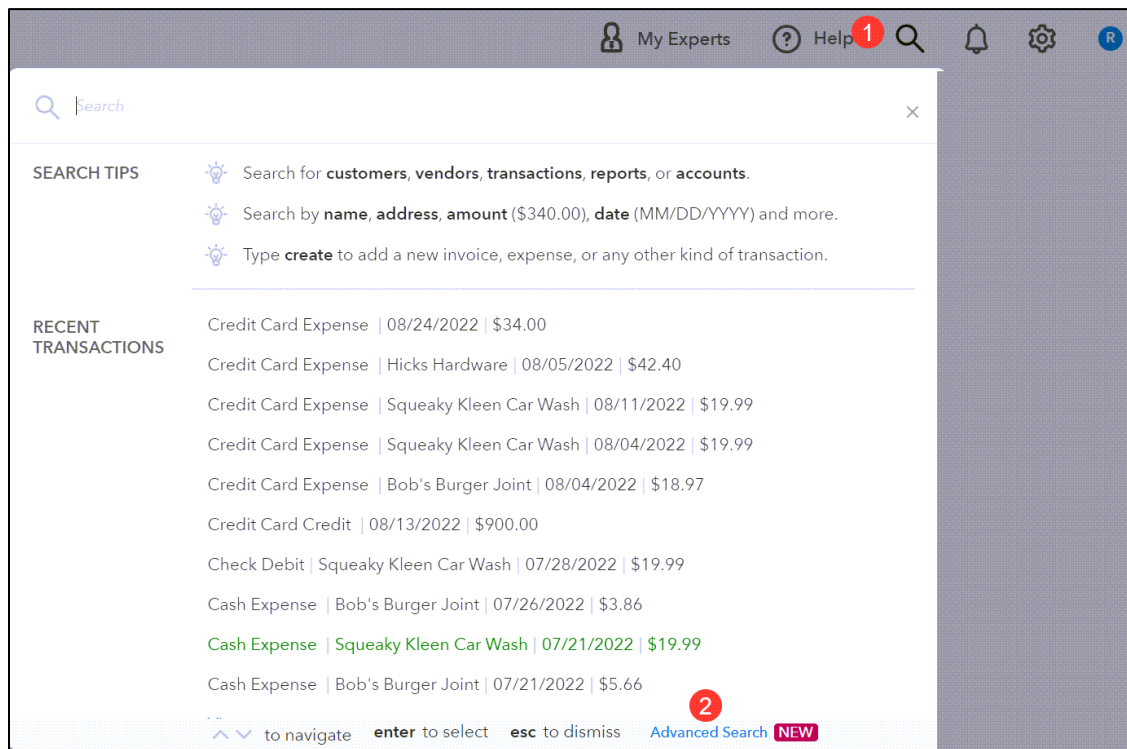



Computerized Accounting with QuickBooks® Online (6e)

By Gayle Williams & Jennifer Johnson

Chapter 1 – Change to **Advanced Search** Tool (pages 1-25 to 1-28)



The Find tool has been updated in QBO.



The tool is still accessed by clicking  on the icon bar and then clicking **Advanced Search**.







Search your transactions [Go to classic Advanced Search](#) or [Send us feedback](#)




Search transaction details like: memo, amount or reference number

Search field  **Additional Filters**  **6**

Showing recent transactions

DATE **1** **TYPE** **2** **REF NO.** **3** **CONTACT** **4** **AMOUNT** **5**

 Select a date range  Select a transaction type    

DATE	TYPE	REF NO.	CONTACT	AMOUNT
08/24/2022	Credit Card			\$34.00
08/13/2022	Credit Card Credit			\$900.00

You can search by entering known details in the search field, or you can use QBO to filter the data in the following ways:

1. By date (single date or date range)
2. By a single **transaction type** (e.g., **Bill**, **Invoice**, **Check**, etc.)

3. By a reference number (e.g., check number, vendor invoice number, journal entry number, etc.)
4. By a single name (customer, vendor, or employee name)
5. By a single amount
6. By two additional filters
 - a. Single **Product** or **service**
 - b. Single general ledger account

Multiple filters can be selected in a single search. For example, filtering the test drive company transactions in a search for all **invoices** for gardening services provided to Amy's Bird Sanctuary would return the following results:

Search your transactions

Search transaction details like: memo, amount or reference number

Showing 2 results

DATE

TYPE

REF NO.

CONTACT

AMOUNT

Select a date range

Invoice

Amy's Bird Sanctuary

Contact: Amy's Bird Sanctuary

Type: Invoice

Product Services: Gardening

Filters

Clear filters

DATE	TYPE	REF NO.	CONTACT	AMOUNT
07/27/2022	Invoice	1001	Amy's Bird Sanctuary	\$108.00
06/12/2022	Invoice	1025	Amy's Bird Sanctuary	\$205.00

The ability to set additional parameters for filters (other than date) is not currently available in the updated tool. The original (classic) system should be used if you need to:

- Look for transactions that include amounts above or below a specified dollar amount
- Look for transactions that contain (or don't contain) specific words in a memo field or in a customer or vendor name field.

The original tool can be accessed by clicking **Go to classic Advanced Search** on the advanced search screen:

Sample Company

My Experts

Help

Search your transactions

Search transaction details like: memo, amount or referen

Showing recent transactions

DATE

TYPE

CONTACT

AMOUNT

Select a date range

Select

Select a contact

Go to classic Advanced Search

Send us feedback