6. Using *Find* function to search for information

Portfolio Manager provides a function called *Find* that allows a user to search all portfolio accounts for specific tickers, for stopped transactions, and for trading activity beyond a certain date. *Find* is especially helpful for individuals with multiple portfolio accounts. Brokers can search clients' portfolios for stopped transactions and to determine the last date of any trading activity.

 To use Find, proceed as follows:

1. Open the ***Portfolio Manager*** application and display the *Find* dialog box by one of the following methods:

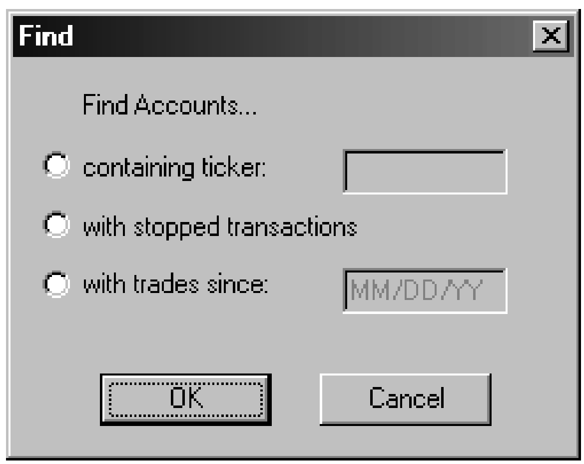
   Click the **Find** button on the toolbar.

   —or—

   Right-click in the Account List section, and choose **Find** from the menu that appears.

   —or—

   Press **Ctrl-F**



Find dialog box

2. The *Find* dialog box that appears gives you three options:

   - **containing ticker**
     Enter a ticker and *Find* searches for all portfolio accounts containing that ticker.
   - **with stopped transactions**
     Choose this option and *Find* searches for stopped positions in all portfolio accounts.

- **with trades since**
  Enter a date and *Find* searches all portfolio accounts for any trading activity (transactions) that has taken place after that date.

3. Choose the **OK** button.
4. If the search is successful, the ***Portfolio Manager*** window will redisplay and show the first account that meets the specified search criteria. The tab page that is displayed depends upon the *Find* option selected:
   - *Ticker* - In the Account List, the first account containing the specified ticker is selected and opened to display a list of all positions in the account. The specified ticker is highlighted on this list and, in the Account Information section, the *Ticker* tab page displays position details.
   - *Stopped transactions* - In the Account List, the first account containing a stopped transaction is selected. In the Account Information section, the *Stop Loss* tab page displays details of stopped transactions for that account.
   - *Trades since* - In the Account List, the first account with trades since the specified date is selected. In the Account Information section, the *Transaction* tab page displays all transactions for that account.
5. To view the next account that meets your *Find* criteria, right-click in the Account List section, and choose **Find Next** from the menu that appears (or press the **F3** key). The ***Portfolio Manager*** window will now show the next account that meets the specified search criteria.
6. Continue to follow the directions in Step 5 to find every portfolio account with positions, stopped transactions, or transaction dates answering the search option you selected.