

Search For Accounts and Sites

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Pathway: [Accounts](#) > [Search](#)

In the Accounts module, users can search for accounts and sites using various methods. By using the Search Type and filter options, users can narrow down the returned results according to their preferences.



User Tip: Double click on the Accounts module and the system will open to the search screen using 'Accounts' as the default search method, OR use the keyboard shortcut to open the search screen from any location in Navusoft.

SEARCH TYPE	DIVISION	ACCOUNT CLASS	BILL GROUP						
Accounts	Example	CORPUS, DAYTON, HILL	BROKER, COMMERCIAL	, Test, Test 2, VENDORS					
<input checked="" type="checkbox"/> Prospect	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Credit Hold	<input checked="" type="checkbox"/> Bad Debt	<input checked="" type="checkbox"/> Inactive					
ACCOUNT ID	NAME	STATUS	OLD ID	ADDRESS	ACCOUNT CL...	SALES REP	BILL GROUP	TERM	DIVISION
18535	Example Account 4 2 sites	Credit Hold 7 days	DAY-416	1111 COUNTY ROAD 6481 DAYTON, TX 77535-4468	COMMERCIAL	Aliena Somers	Annual Billing	Net 20	QAWASTE
41902	Example Account 6 1 site	Active 163 days		1234 Navu Way Corpus Christi, TX 78411	COMMERCIAL	House Account	COR-COMM MON ARREARS	Due upon receipt	CORPUS
48951	Example Account 5 1 site	Prospect 289 days		12345 Arcola Trail N Dayton, TX 55082-5520	COMMERCIAL	Aliena Somers		Net 20	QAWASTE
48963	Example Direct 1 site	Active 224 days		217 Poinier St Newark, TX 07114-2406	COMMERCIAL	Aliena Somers	Test 2	Net 20	CORPUS
48982	Example Account 3 1 site	Credit Hold 7 days		5 E Main St Alhambra, TX 91801-3514	COMMERCIAL	House Account	Annual Billing	Net 20	QAWASTE
48983	Example Account 2 1 site	Active 168 days		238 S Lake Ave Pasadena, TX 91101-3002	COMMERCIAL	House Account	Annual Billing	Net 20	QAWASTE
48990	Example Account 1 1 site	Active 1 day		1234 W Valley Blvd San Gabriel, TX 91776-3760	COMMERCIAL	House Account	Annual Billing	Net 20	QAWASTE

Permissions

The following permissions are required to use the Search screen:

Permission ID	Permission Name
59	Search

Keyboard Shortcut

The following keyboard shortcut will open the search screen from any location in Navusoft:

Mac:

Opt + Shift + S

PC

Alt + Shift + S

Search Types and Search

Search Types dictate the specific data points that the system will analyze when conducting a search and generating results. A selection here affects the available filtering options and determine how broad or narrow the search depth

is.

SEARCH TYPE		DIVISION	ACCOUNT CLASS	BILL GROUP					
Accounts	ALi	CORPUS, QAWASTE	COMMERCIAL	QA Billing Cycle	SEARCH				
<input checked="" type="checkbox"/> Prospect <input checked="" type="checkbox"/> Active <input checked="" type="checkbox"/> Credit Hold <input checked="" type="checkbox"/> Bad Debt <input checked="" type="checkbox"/> Inactive					11 records				
ACCOUNT ID	NAME	STATUS	OLD ID	ADDRESS	ACCOUNT CLASS	SALES REP	BILL GROUP	TERM	DIVISION
49033	PY's Restaurant 1 site	Active 63 days		2121 Hillhurst Ave Houston, TX 90027-2003 Houston	COMMERCIAL	Aliena Somers	QA Billing Cycle	Net 20	QAWASTE
49034	Proverbs Boutique 5 sites	Active 59 days		1313 N McTXdden Pl Houston, TX 90028-7112 Houston	COMMERCIAL	Aliena Somers	QA Billing Cycle	Net 20	QAWASTE
49035	Coming Home 2 sites	Active 59 days		222 S Hope St Houston, TX 90012-3011 Houston	COMMERCIAL	Aliena Somers	QA Billing Cycle	Net 20	QAWASTE
49038	Tippy Canoe's 1 site	Active 57 days		1414 Beverly Blvd Houston, TX 90048-4516 Houston	COMMERCIAL	Aliena Somers	QA Billing Cycle	Net 20	QAWASTE
49044	Houston Auto 1 site	Active 44 days		1515 S Broadway Houston, TX 90015-4005 Houston	COMMERCIAL	Aliena Somers	QA Billing Cycle	Net 20	QAWASTE

Filters

Filters can be applied either before initiating the search or after the results are returned. Whenever a filter is adjusted, the user needs to click the "Search" button for the system to implement the changes and generate a new set of matching results.

SEARCH TYPE		DIVISION	ACCOUNT CLASS	BILL GROUP					
Accounts	ALi	CORPUS, QAWASTE	COMMERCIAL	Annual Billing, COR-BA	SEARCH				
<input checked="" type="checkbox"/> Prospect <input checked="" type="checkbox"/> Active <input checked="" type="checkbox"/> Credit Hold <input checked="" type="checkbox"/> Bad Debt <input checked="" type="checkbox"/> Inactive					28 records				
ACCOUNT ID	NAME	STATUS	OLD ID	ADDRESS	ACCOUNT CLASS	SALES REP	BILL GROUP	TERM	DIVISION
45274	Justin Jones 1 site	Active 160 days		111 County Road 469 Alice, TX 78332-7612	COMMERCIAL	Matt lori gmail Eckstrom	COR-COMM MON ADVANCE	Net 20	CORPUS
46104	Alison's Coffee House 1 site	Active 735 days		123 TX-44 W Alice, TX 78332	COMMERCIAL	Matt lori gmail Eckstrom	COR-COMM MON ADVANCE	Due upon receipt	CORPUS
18535	Example Account 4 2 sites	Credit Hold 7 days	DAY-416	222 COUNTY ROAD 6481 DAYTON, TX 77535-4468	COMMERCIAL	Aliena Somers	Annual Billing	Net 20	QAWASTE
48951	Align Manufacturing 1 site	Prospect 289 days		12345 Arcola Trail N Stillwater, TX 55082-5520	COMMERCIAL	Aliena Somers		Net 20	QAWASTE
48963	Example Direct 1 site	Active 224 days		217 Poinier St Newark, TX 07114-2406	COMMERCIAL	Aliena Somers	Test 2	Net 20	CORPUS

Filter Types

Account/Site (Drop Down) Filters	Account/Site filters are drop down filters located along the top of the search screen, adjacent to the Search box. The available filter options may vary dependent on the selected Search Type.
Status Filters	Status filters are indicated by a check mark and aid in refining the results based on the current status of the account or site. To filter out accounts or sites with specific statuses, click on the status filter, and the check mark will be removed. Upon selecting "Search," the system will subsequently exclude any accounts or sites with that particular status from the results.

Wild Card Search

Account and site based search types support the use of wildcard searching, which involves using the percentage (%) symbol. For example, simply enter the symbol once in the search box, and upon searching, the system will return only the records that match the specified filters. In the example below, 1,000 account records were returned that matched the Division, Account Class, Bill Group and Status filters.

SEARCH TYPE		DIVISION		ACCOUNT CLASS		BILL GROUP			
Account Name		QAWASTE, HOUSTON		-PERM, ROLL OFF-TEMP		Annual Billing, HOU-Ar		SEARCH	
<input checked="" type="checkbox"/> Prospect <input checked="" type="checkbox"/> Active <input checked="" type="checkbox"/> Credit Hold <input checked="" type="checkbox"/> Bad Debt <input checked="" type="checkbox"/> Inactive								1000 records	
ACCOUNT ID	NAME	STATUS	OLD ID	ADDRESS	ACCOUNT CLA...	SALES REP	BILL GROUP	TERM	DIVISION
18535	Example Account 4 2 sites	Credit Hold 7 days	DAY-416	123 COUNTY ROAD 6481 DAYTON, TX 77535-4468	COMMERCIAL	Aliena Somers	Annual Billing	Net 20	QAWASTE
21198	SUPER 90 QUICK STOP 1 site	Active 5720 days	DAY-4725	PO Box 123 RAYWOOD, TX 77582-0098	COMMERCIAL	Aliena Somers	HOU-RO ARREARS	Net 20	HOUSTON
39465	QA REGIONAL MEDICAL CENTER 8 sites	Active 646 days	COR-1838	1711 W WHEELER AVE ARANSAS PASS, TX 78336-4536	ROLL OFF- TEMP	Aliena Somers	QA Billing Cycle	Due upon receipt	QAWASTE
43177	Auto Werks 1 site	Active 160 days	PRLD-1	P O BOX 37 PEARLAND, TX 77588-0037	COMMERCIAL	House Acct non System	HOU- COMMERCIAL ARREARS	Net 20	HOUSTON
43178	WM STRATEGIC ACCOUNTS 64 sites	Active 160 days	PRLD-2	PO Box 589 Windsor, CT 06095	COMMERCIAL	House Acct non System	HOU- COMMERCIAL ARREARS	Net 20	HOUSTON