Search For Accounts and Sites

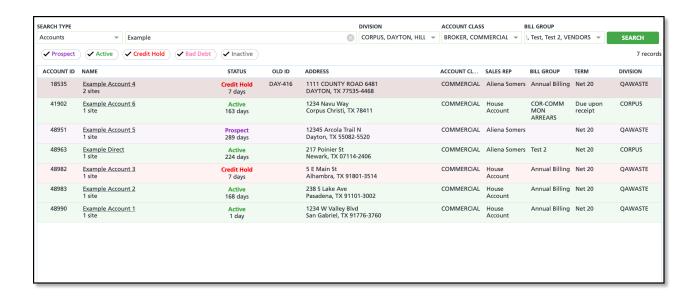
Last Modified on 03/29/2024 11:10 am EDT

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.



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:

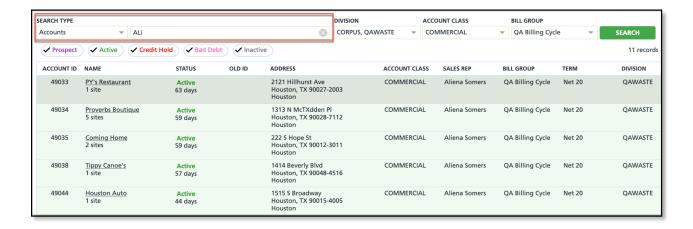
Opt + Shift + S

PC

Alt + Shift + S

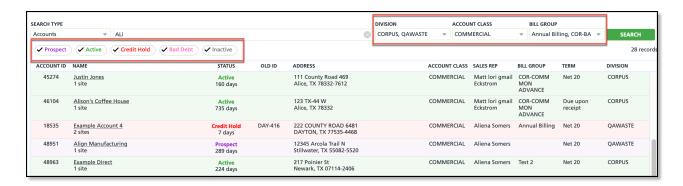
Search Types and Search

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



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.



Filter Types

Account/Site (Drop Down) Filters	adjacent to the Search box. The available filter ontions may vary dependent on the
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.

