Search For Accounts and Sites

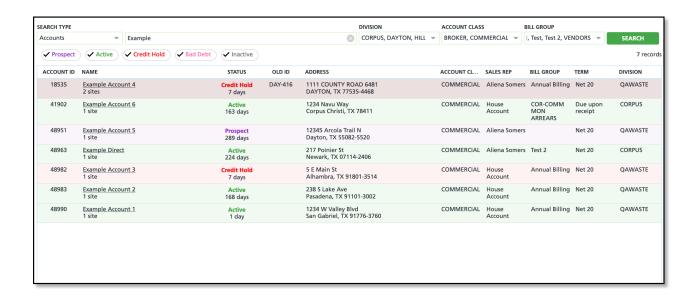
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Pathway: Accounts > Search

In the Accounts module, users can search for accounts and sites using multiple methods. The *Search Type* and filter options allow users to refine results based on 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

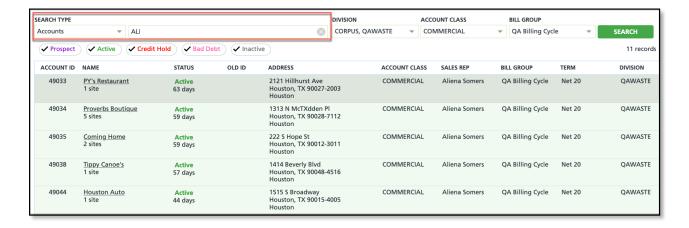
PC

Alt + Shift + S

Search Types and Search

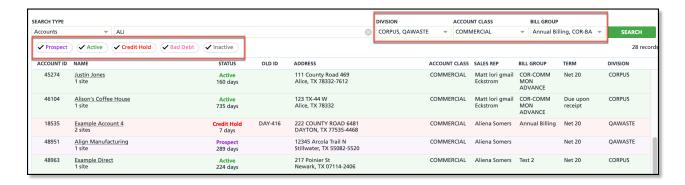
Search Types dictate the specific data points that the system will analyze when conducting a search and generating results. A selection here affects the available filtering options and determine how broad or narrow the search

depth is.



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

Drop Down Filters	Account/Site filters are located along the top of the search screen, adjacent to the Search box. The available filter options vary dependent on the selected Search Type .
Status Filters	Status filters (Prospect, Active, Credit Hold and etc.), indicated by a check mark, help refine results based on the account or site status. • Checked – Includes accounts/sites with that status (if other search and filter criteria are also met). • Unchecked – Excludes accounts/sites with that status.

Wild Card Search

Many search types support wildcard searching using the percentage (%) symbol. Entering this symbol in the search box prompts the system to return all records that match the applied filters. For example, in the scenario below, 1,000 account records were returned that matched the Division, Account Class, Bill Group, and Status filters.

