

How To Open Existing Event via Search Screen

Here are the steps on how to open existing record via Search screen:

- 1. Select **Contract Management Event Configuration** from the **Menu Panel**.
- 2. Double-click mouse to open screen. If there's already an existing record, **Search** screen will open.

Event Configuration

New Open Refresh Report

Event Configuration

View Filter (F3) 13 record(s)

	Event Name	Event Description	Alert Type	Notification Type	Summarized	Active	Days To Remind	Reminder Condition
<input type="checkbox"/>	Unconfirmed con...	Unconfirmed co...	Event	Screen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	
<input type="checkbox"/>	Contract without ...	Contract without...	Event	Screen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	
<input type="checkbox"/>	Unsubmitted Co...	Unsubmitted Co...	Event	Screen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	
<input type="checkbox"/>	Unsigned Contra...	Unsigned Contra...	Event	Screen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	
<input type="checkbox"/>	Contract Without...	Contract Without...	Reminder	Screen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	45	day(s) before du...
<input type="checkbox"/>	Contract Without...	Contract Without...	Reminder	Screen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5	day(s) after due ...

- 3. Select the existing records and click **Open** button.

Event Configuration

New Open Refresh Report

Event Configuration

View Filter (F3) 13 record(s) (1 selected)

<input checked="" type="checkbox"/>	Unconfirmed con...	Unconfirmed co...	Event	Screen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	
<input type="checkbox"/>	Contract without ...	Contract without...	Event	Screen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	
<input type="checkbox"/>	Unsubmitted Co...	Unsubmitted Co...	Event	Screen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	
<input type="checkbox"/>	Unsigned Contra...	Unsigned Contra...	Event	Screen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	

- 4. The screen for the selected record will open.

Event Configuration

New Save Search Delete Undo Close

Details Recipients

Event

Unconfirmed contract

Description

Unconfirmed contract

Action

Unconfirmed Sequence

Alert Type

Event

Notification Type

Screen

Summarized

☐

Active

☒

Remind Recipients

0

Reminder Condition

Alert Frequency

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- 5. For opening Multiple records, select Multiple records you want to open and click on **Open** Button.
- 6. It will open all the selected records.
- 7. Search for the existing record you want to open manually by entering a keyword on the **Filter** field and click on **Refresh**.

Event Configuration

New Open Refresh Report

Event Configuration

View Unconfirmed 1 record(s)

<input type="checkbox"/>	Unconfirmed con...	Unconfirmed con...	Event	Screen	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	
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8. Or you can also use the Advance

Filter.

- a. Click on the Filter button to show filter field.

Event Configuration					
New Open Refresh Report ▾					
Event Configuration					
View	Filter (F3)	13 record(s)			
	Event Name	Event Description	Alert Type	Notification Type	Summarized
<input type="checkbox"/>	Unconfirmed con...	Unconfirmed co...	Event	Screen	<input type="checkbox"/>
<input type="checkbox"/>	Contract without ...	Contract without...	Event	Screen	<input type="checkbox"/>
<input type="checkbox"/>	Unsubmitted Co...	Unsubmitted Co...	Event	Screen	<input type="checkbox"/>
<input type="checkbox"/>	Unsigned Contra...	Unsigned Contra...	Event	Screen	<input type="checkbox"/>
<input type="checkbox"/>	Contract Without...	Contract Without...	Reminder	Screen	<input type="checkbox"/>

- b. Click on the drop down button to select criteria. Criteria are based on the columns present in the grid.

Event Configuration					
New Open Refresh Report ▾					
Event Configuration					
View	Clear All Filters	Filter (F3)	13 record(s)		
X	Event Name	Event Description	Alert Type	Notification Type	
<input type="checkbox"/>	Event Description	Unconfirmed co...	Event	Screen	
<input type="checkbox"/>	Alert Type	Contract without...	Event	Screen	
<input type="checkbox"/>	Notification Type	Unsubmitted Co...	Event	Screen	
<input type="checkbox"/>	Summarized	Unsigned Contra...	Event	Screen	
<input type="checkbox"/>	Active	Contract Without...	Reminder	Screen	
<input type="checkbox"/>	Days To Remind	Contract Without...	Reminder	Screen	
<input type="checkbox"/>	Reminder	Contract Without...	Reminder	Screen	
<input type="checkbox"/>	Condition	Contract Without...	Reminder	Screen	
<input type="checkbox"/>	Alert Frequency	Contract Without...	Reminder	Screen	
<input type="checkbox"/>	Action Name	Contract Without...	Reminder	Screen	

- c. You can select additional criteria to tighten your search further.

Event Configuration					
New Open Refresh Report ▾					
Event Configuration					
View	Clear All Filters	Filter (F3)	13 record(s)		
X	Event Name	Contains			
X	Event Descriptior	Contains			
X	Notification Type	Contains			