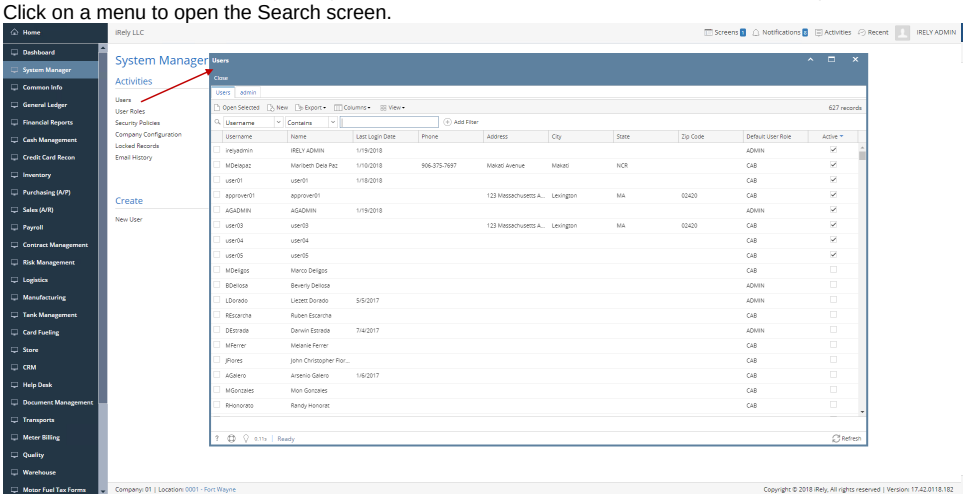
Search

The search screen provides a flexible way to search for the specific record you are looking for.

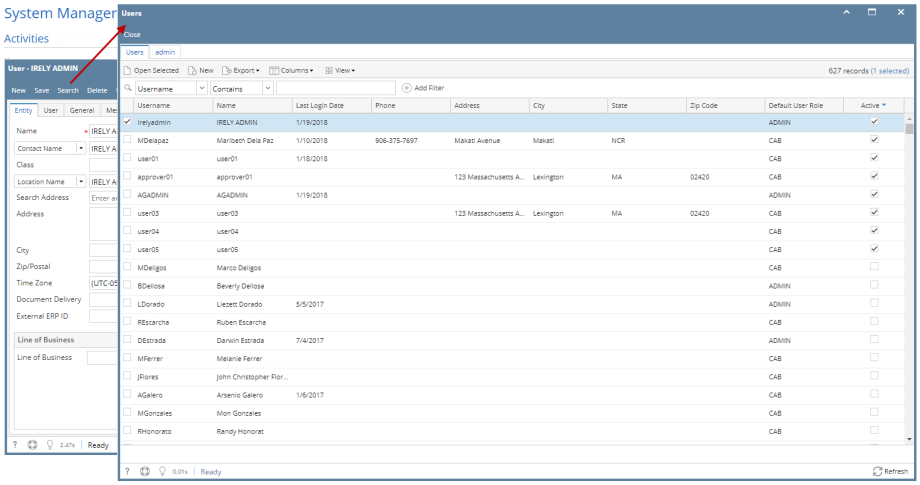
How to open the Search screen:

1. Click a module on the left navigation panel. All menus for the module will show in the center panel
2. Click on a menu to open the Search screen.



**Note that there are screens that do not offer searching of records like Market Zone.

3. **Floating Screen from record.** Click the Search toolbar button on a screen.



Toolbar buttons:

1. **Open Selected** - This button will open the records that are selected/checked to the respective screen. Another way of opening a single record is by double clicking the grid row of the record you want to open or clicking the hyperlink of the record.
2. **New** - This button will open a new screen where you can add the details of the new record.
3. **Export** - Export button is a drop down button where you can select the type of file you want when exporting the search list. The following types are available:
    a. **Excel** - Export's the list in Search screen in excel type.
    b. **PDF** - Export's the list in Search screen in pdf type.
    c. **Text** - Export's the list in Search screen in text type.
    d. **CSV** - Export's the list in Search screen in csv type.
4. **Columns** - This drop down shows the list of columns that you can Show/Hide.
5. **View** - Option to add a Custom Tab or Custom Menu
6. **Close** - This button will close the Search screen.
7. **Add Filter** - Adds a new Column combo box ready to select column to filter
8. **Refresh** - Located at the bottom of the search screen. This button will reload the grid area of the Search screen like it was freshly opened.

Shortcut Keys:

1. **Alt + N** - Keyboard shortcut to "**New**" that opens a new record
2. **F2** - Keyboard shortcut to "**Add Filter"** button
3. **F3** - Keyboard shortcut to "**Open Selected**" button. Opens the selected record in the search grid
4. **F5** - Keyboard shortcut to "**Clear Filters**" button

5. **Alt + A** - Keyboard shortcut to "**Apply**" changes made to the Columns drop down.
6. **Alt + C** - Keyboard shortcut to "**Cancel"** button for the Columns drop down menu.
7. **Ctrl + (0-9)** - Keyboard shortcut for changing tabs
8. **Alt + X** - Keyboard shortcut for closing the search screen

Navigation using keyboard:

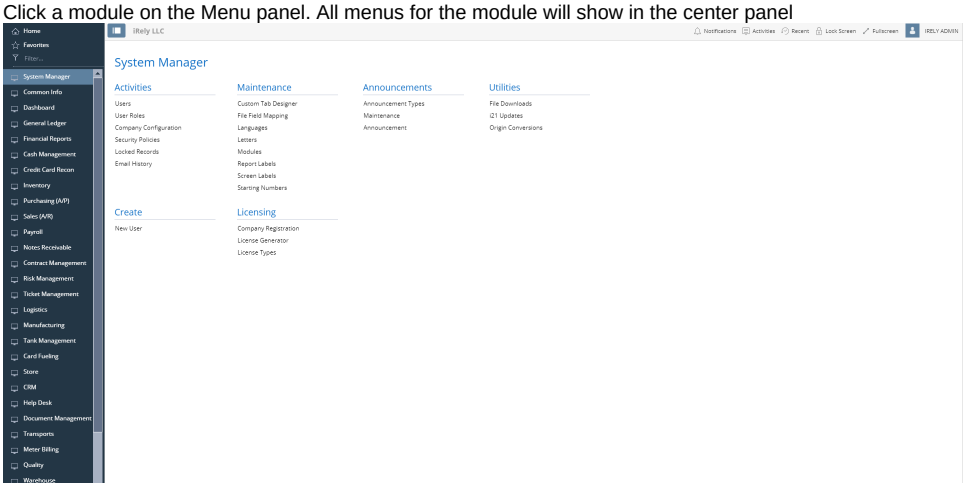
1. **Select row + Shift + select end row -** Selects multiple rows
2. **Tab -** Tabbing focuses through these fields:
    a. "Column" combo box
    b. "Condition" combo box
    c. "Filter" fieid text box
    d. "Grid Row"
3. **Arrow up and down -** Navigate through rows
4. **Space bar -** Select/deselect rows
5. **Esc -** Closes the search screen

Additional:

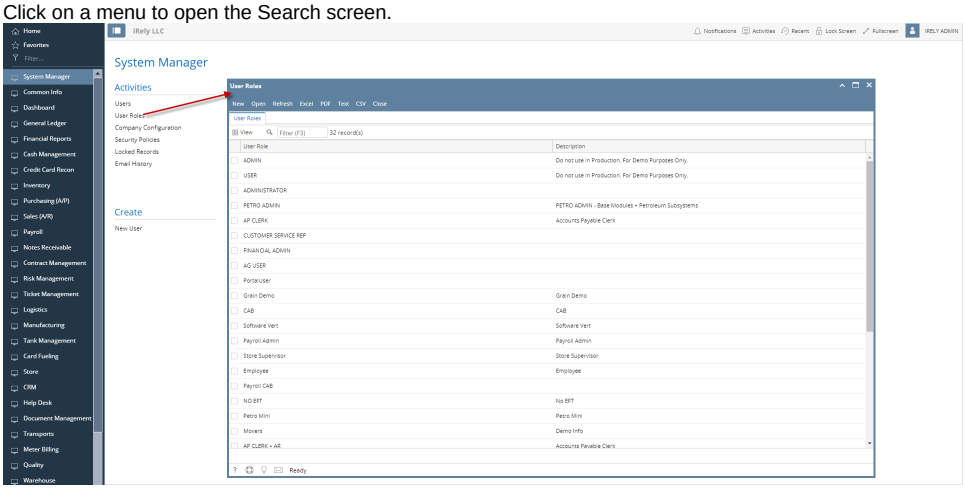
1. **# selected** (hyperlink) - When clicked, will open the selected rows
2. **Default Filter** - First column of the search screen is the default filter

How to open the Search screen:

1. Click a module on the Menu panel. All menus for the module will show in the center panel

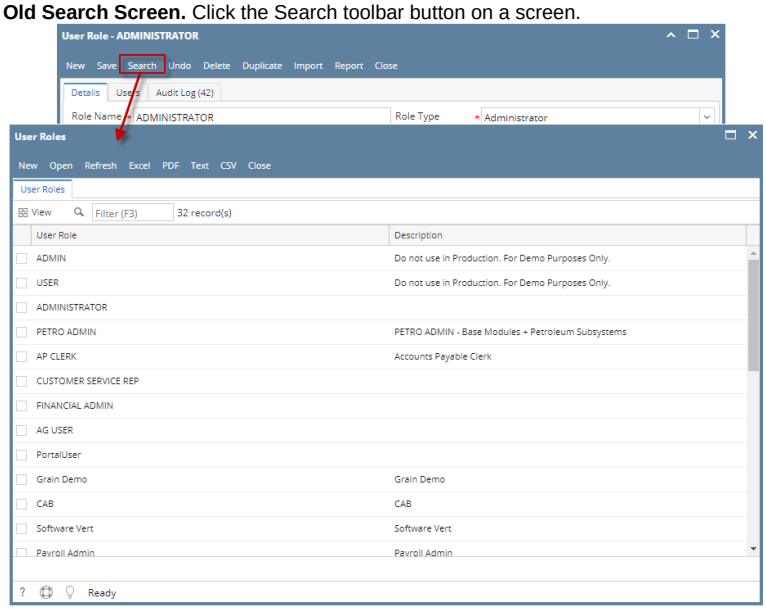


2. Click on a menu to open the Search screen.



**Note that there are screens that do not offer searching of records like Market Zone.

3. **Old Search Screen.** Click the Search toolbar button on a screen.

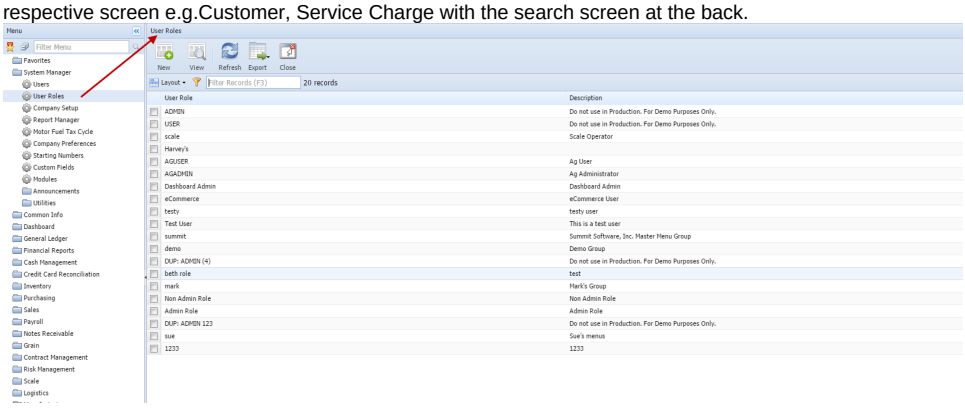


Toolbar buttons:

1. **New** - This button will open a new screen where you can add the details of the new record. When a new screen is open, the Search screen will automatically close.
2. **Open**- This button will open the records that are selected/checked to the respective screen. Another way of opening a single record is by double clicking the grid row of the record you want to open or clicking the hyperlink of the record. When a screen is open, the Search screen will automatically close.
3. **Refresh** - This button will reload the grid area of the Search screen.
4. **Excel** - Export's the list in Search screen in excel type.
5. **PDF** - Export's the list in Search screen in pdf type.
6. **Text** - Export's the list in Search screen in text type.
7. **CSV** - Export's the list in Search screen in csv type.
8. **Close** - This button will close the Search screen.

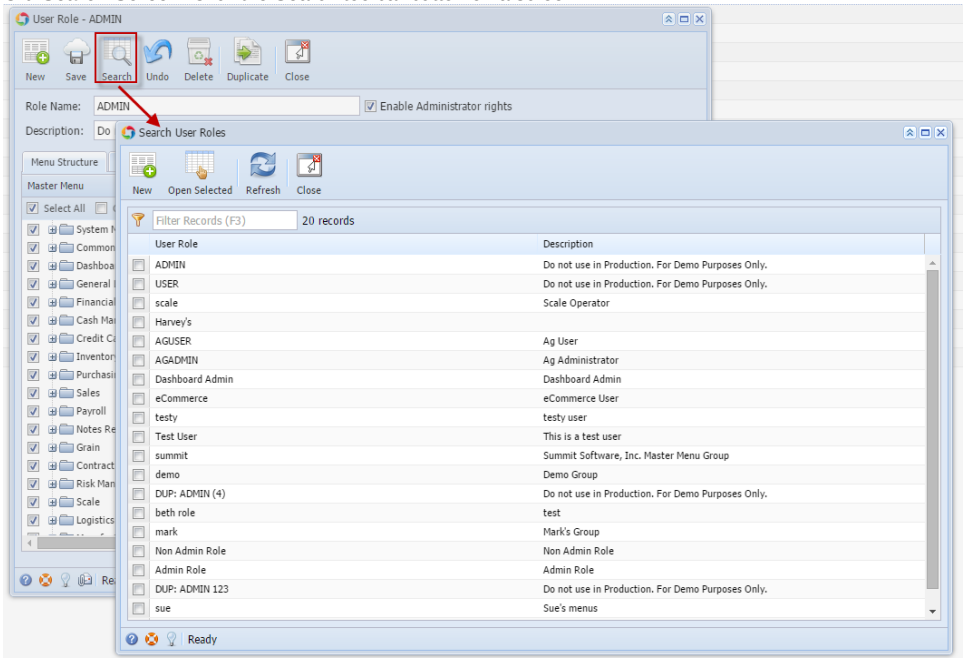
How to open the Search screen:

1. **Docked Search Screen**. Click a menu on the Menu panel. If there are existing record, it will open the Search screen. Otherwise, it will open the respective screen e.g.Customer, Service Charge with the search screen at the back.



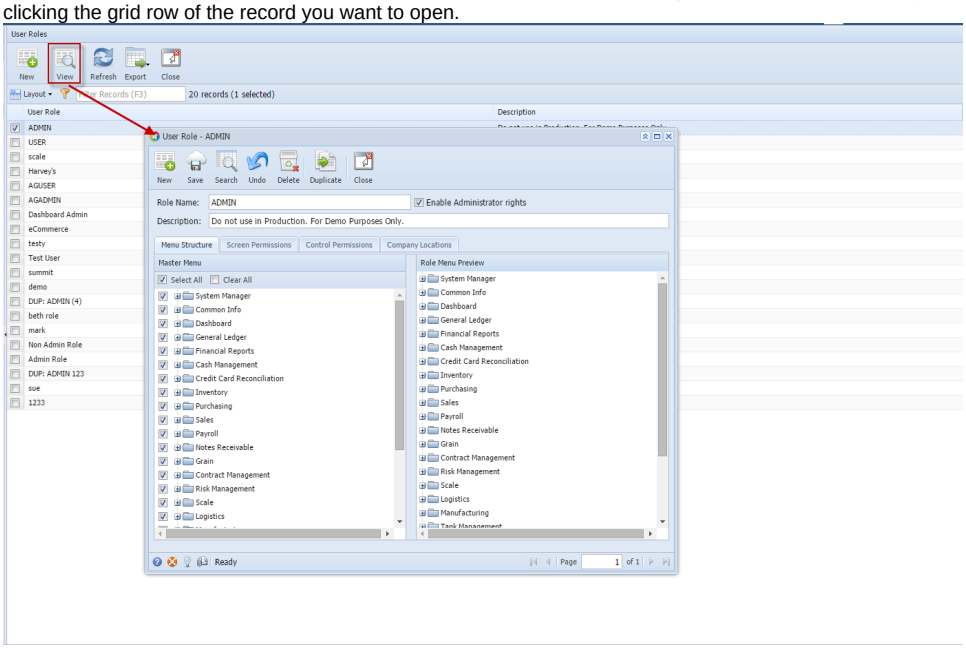
Note that there are screens that do not offer searching of records like Market Zone.

2. **Old Search Screen.** Click the Search toolbar button on a screen.



Toolbar buttons:

1. **New** - This button will open a new screen where you can add the details of the new record.
2. **View** - This button will open the records that are selected/checked to the respective screen. Another way of opening a single record is by double clicking the grid row of the record you want to open.



3. **Refresh** - This button will reload the grid area of the Search screen.
4. **Export** - Export's the list in Search screen.
5. **Close** - This button will close the Search screen.

Pages

- How to Create a Custom Tab on Search Screens
- Grid Column Options
- How to Sort records on grid
- How to Filter records
  - Filtering Multiple Records using Includes or Excludes
  - How to Filter record using Advanced Filter button
  - How to Filter record using Column Filter
  - How to filter record using Filter Grid

    - Search Filter Condition
- How to Group the Records on Search Grid
- How to Hide a Column
- Exporting List on Search Screen
- Importing Views