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.

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**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.

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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.

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- 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 boxb. "Condition" combo box
 - **c.** "Filter" field 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. <u>Click a module on the Menu panel. All menus for the module will show in the center panel</u>

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🖵 Dashboard	Users User Roles	Custom Tab Designer File Field Mapping	Announcement Types Maintenance	File Downloads (21 Updates
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🖵 Financial Reports	Security Policies	Letters		
Cash Management	Locked Records	Modules		
Credit Card Recon	Email History	Report Labels		
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2. Click on a menu to open the Search screen.

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Contract Management		AG USER	
Risk Management		PortalUser	
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Tank Management		Payroll Admin	Payrol Admin
Card Fueling		Store Supervisor	Store Supervisor
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**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.

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Details Use's Audit Log (42)		
Role Name * ADMINISTRATOR Role Type * Administrator	~	
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User Role Description		
ADMIN Do not use in Production. For Demo Purposes Only.		^
USER Do not use in Production. For Demo Purposes Only.		
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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.
- 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.

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

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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.

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- 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