Account List Screen

Accounts · https://learn.logisense.com/docs/472918305/

Last verified with: 10.8.6.0

Account List Screen appears after selecting the Account menu item

Overview

The Accounts screen is the main account-search workspace in LogiSense. From this screen you can search for accounts using different search contexts, review matching results in a sortable grid, and load the selected account into the account experience.

This screen is designed for more than a simple account-name lookup. Depending on the selected search view, users can search by values such as account name, account hierarchy, billing contact, usage identifier, invoice name, account extensions, and account-package extensions.

Search And Results Area

The top area of the screen is used to control how the account search is performed.

- **Search View**: selects the saved search filter that controls the active search context and the columns shown in the results grid.
- **Search box**: enters the value to search for within the selected search view.
- **Add New Account**: opens the account-creation workflow directly from the account search screen.

When you enter a search value, the results are displayed in the account grid below. The visible columns depend on the selected search view. Results are shown in a sortable grid so users can review and organize matches by the columns that are most useful for the current search.

Selecting a row in the results grid loads the selected account and takes the user into the account experience.

Search Contexts

The selected search view determines what type of values the search box will look for. Search contexts supported by the screen include:

- **Account by Name**: searches for account records by account name.
- **Account by Hierarchy**: searches for accounts using hierarchy-related information.
- **Account by Billing Contact**: searches using billing-contact details associated with the account.
- **Account by Usage Identifier**: searches using usage identifiers related to the account or its services.
- **Invoice by Name**: searches using invoice-name values associated with the account.
- **Account Extensions**: searches using configured account-extension fields.
- **Account Package Extensions**: searches using configured account-package-extension fields.

These contexts allow users to reuse the same search workspace for different operational tasks without navigating to a different screen.

Saved Search Filters

The Search View control is a reusable saved-filter workflow rather than a simple dropdown.

Users can:

- select an existing saved filter
- create a new saved filter
- edit an existing saved filter
- delete a non-core saved filter
- mark a saved filter as the default

Saved search filters allow users to keep commonly used search setups without rebuilding the same search configuration every time they return to the screen.

Search Filter Configuration

The search-filter configuration dialog is used to define how a saved search view behaves.

This dialog supports:

- **Search context selection**: determines what kind of record or value the search box will search against.
- **Filter name**: identifies the saved search view in the Search View control.
- **Default flag**: marks the saved search view as the default selection.
- **Columns tab**: controls which columns appear in the account results grid.

This dialog is especially useful for users who work with account lists frequently and need search views tailored to specific operational tasks.

Columns And Grid Results

The account results are displayed in a grid. The selected search filter controls which columns are shown.

Saved search filters can be used to:

- add columns to the results grid
- remove columns from the results grid
- reorder columns
- mark columns as included in search where supported by the search context

This means a saved search view can control both how the search works and how the results are displayed.

Guides

Searching For An Account

1. Select the desired **Search View**.
2. Enter a value in the search box.
3. Review the matching results in the grid.
4. Click the desired result row to load the account.

Creating A Saved Search View

1. Open the Search View configuration dialog from the Search View control.
2. Select the search context you want to use.
3. Enter a name for the saved search view.
4. Configure the columns that should appear in the results grid.
5. If desired, mark the search view as the default.
6. Save the search view.

Adding A New Account

1. Click **Add New Account**.
2. Complete the account-creation workflow.
3. Save the new account.