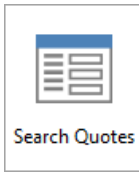


Search Quotes

Last Modified on 25/09/2023 2:52 pm AEST



The instructions in this article relate to **Search Quotes**. The icon may be located on your [StrataMax Desktop](#) or found using the [StrataMax Search](#).

Search Quotes can be used to find specific statuses, for example, outstanding quotes. Another example, searching by 'Contractor Industry' (if populated from **Creditor Maintenance**) which can be used to analyse data and exported to Excel. Using these areas will also assist in keeping the [Dashboard](#) for outstanding Quotes current.

Search Quotes | Security

To access the **Search Quotes**, the user must have permission set to 'Allow' for *Search Quotes* under the 'Menus' category in [Security Setup](#).

Search Quotes

Using **Search Quotes** offers a search window that can be tailored to include relevant TaskMax fields of restriction, such as *Quote Deadline* date being within the last seven days to track what quotes have not been received. Another example includes using the *Quote Finalised* field to determine if quotes are finalised.

The columns and sort order displays can also be helpful to include relevant information for the scenario required. These can also be saved for a [Saved Search](#), which will allow this to be used at a later time and can be made available for a User or Group.

To select multiple fields in the 'Columns' display area, click the first field, hold Ctrl, and select the following field. This will select both fields and allow these to be moved up or down simultaneously.

1. Search or select **Search Quotes**.
2. Referring to the restriction fields, the *Current Building* will be a default of restriction. Click + to add further fields of restriction. Click the - to remove any fields of restriction.
3. Refer to the *Advanced* area and apply any Columns and Sort Order preferences.
4. Click *Refresh* to view the results.
5. Click *Export* if this information should be available in Excel.
6. Click *Save Search As* to save this saved search for later use.

7. Enter a *Name* for the saved search.
8. Select who should have access to this saved search. If assigned to the group, only the groups you are a member of are available.
9. Click *Save as default* if this should be the default view when opening the **Search Quotes** window.
10. Click *Save*.

Each column can be clicked on to adjust the sort order.

Search Quotes | Saved Searches

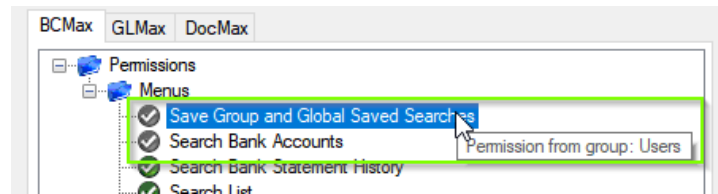
'Saved Searches' are designed for convenience so that you can save a selection of fields, columns, and a specific sort order so that it can be loaded later.

'Saved Searches' can also be set as the 'default' search for the selected screen. This means that the selection of fields, columns, and specific sort order will be the one chosen whenever the menu screen/icon is selected.

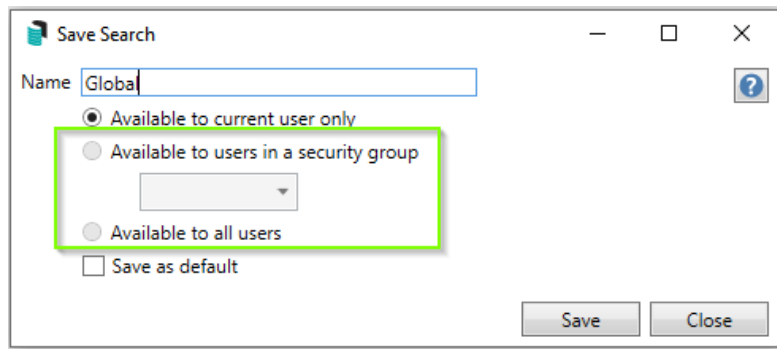
'Saved Searches' can be saved for the current user, globally (accessible to all users), or for a specific user group.

Saved Searches | Security Setup Permissions

A security permission will either allow or deny individual *Users* or *User Groups* access to create or delete a search. The permission is called 'Save Group and Saved Searches' under the 'Menus' category in [Security Setup](#). You can also type the word 'Search' into the filter field and click the *Filter* button to see the permission.



If the *User* or *User Group* do not have the permission set to 'Allow' then the ability to save a search for all users or a user group will be inactive.



Saved Searches | Set up a new Saved Search

1. Configure the required fields and click the *Refresh* button to display the required data.
 - Optionally click the *Advance* button to also configure the displayed columns, and specific sort order.
2. Click the *Refresh* button to display the data.
3. Click the *Save Search As* button, and the 'Save Search' window will appear.
4. Enter a 'Name'.
5. Select one of the three radio buttons, depending on your requirement:
 - *Available to current user only* will save the search for the current user only.
 - *Available to users in security group* will save the search for the *User Group* selected from the drop-down (this radio button is only available if you have the right permission, and the *User Groups* available in this list are limited to the *User Groups* that you are a member of).
 - *Available to all users* will save the search for all StrataMax users (this radio button is only available if you have the right permission).
6. Optionally tick the *Save as default* box to load this 'Saved Search' whenever the menu screen/icon is opened.

Saved Searches | Load or Delete a Saved Search

1. At the bottom of the screen, click the *Load/Delete Search* button.
2. In the 'Load Search' window, click the blue *Load* button to load the *Saved Search*, or click the red cross

button to delete the *Saved Search*.

3. If you click the *Load* button, the 'Load Search' window will disappear, and the screen will refresh automatically and load the *Saved Search* data.
4. If you click the *Delete* button, a confirmation pop-up will appear; Click *Yes* to confirm the deletion.

Saved Searches | Edit a Saved Search

1. If the *Saved Search* you want to edit has been set as the default search, it should be on screen already, and you can proceed to the next step. Otherwise click the *Load/Delete Search* button.
 2. In the 'Load Search' window, click the blue *Load* button.
 3. Now make any changes required to the required fields, and optionally click the *Advance* button to also configure the displayed columns, and specific sort order.
 4. Click the *Refresh* button to display and check the data.
 5. Click the *Save Search* button to save the applied changes.
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