Performing a Global Search

Quick Guide

1. Performing a Global Search
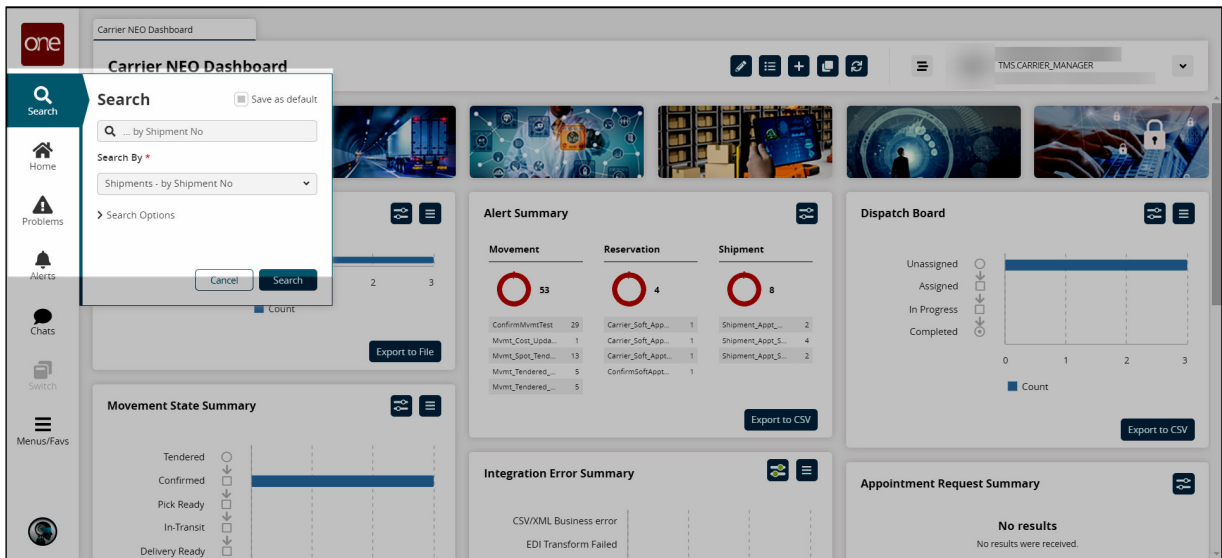
The NEO global search allows users to search for orders, shipments, appointments, contracts, claims, requisitions, and other items depending on the user's role.

Complete the following steps to use the NEO global search:

1. Click **Search** in the left sidebar.
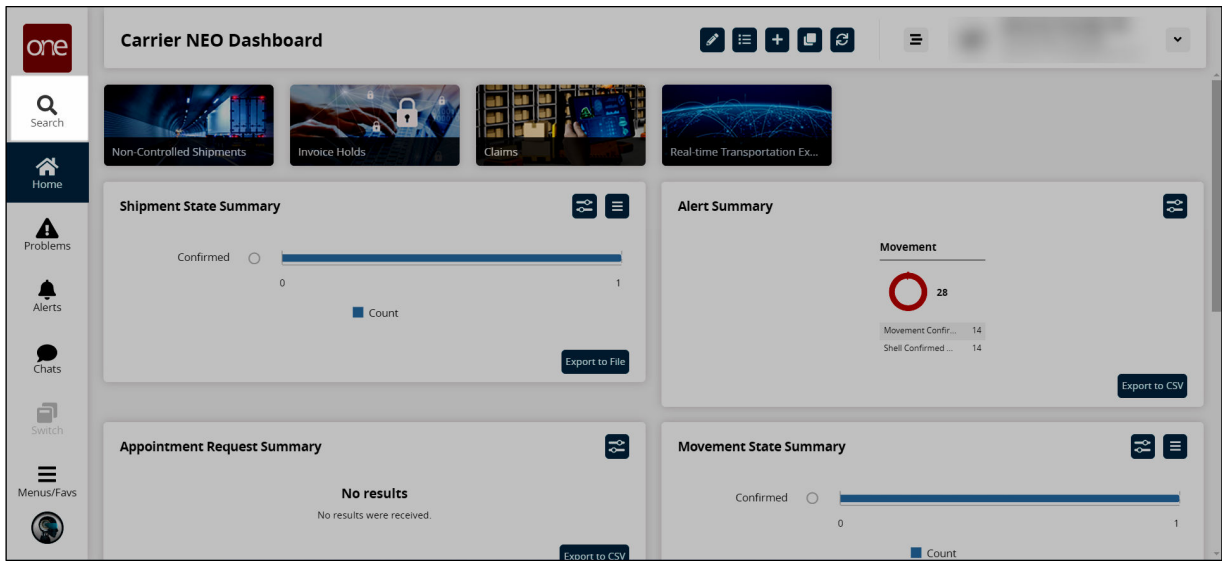
The Search slide-out displays.

2. In the **Search By *** field, select a search item from the dropdown menu.
   The top search field populates with the search criteria.
3. In the **Search** field, type in the search criteria. The asterisk (*) as a wildcard is accepted if you don't have all of the information or wish to pull up multiple items.
4. Click the down arrow next to **Search Options**.
   The Retrieve For field displays.
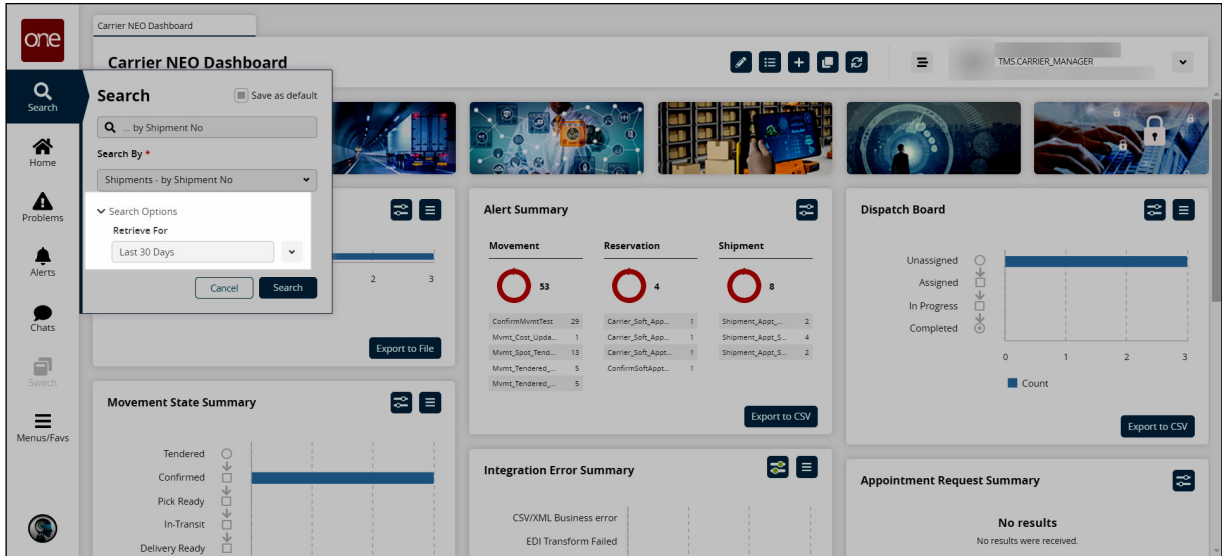
5. Select the time period from the **Retrieve For** dropdown menu. The default is **Last 30 Days**.

6. Click the checkbox at the top of the slideout to save this search as a default.

7. Click the **Search** button.

   The report for the search criteria specified displays and all of the search criteria is save in the slideout for future use.