Filter Accounts/Object Ranges

Menu option is Records > Accounts

The Accounts screen will normally display all accounts the user has permission to access. The Filter button allows the user to temporarily limit the accounts displayed on the Accounts list. This might be helpful if you wanted to view only (examples) salary accounts, office supply accounts, etc. To do so, click the Filter button and use the Pick List button to select the ranges of accounts you wish to filter. Click the Save button and the account browse screen will now display the filtered accounts. The Filter button applies only to the current user.

The tabs on this screen display various account permissions for this user, for informational purposes only.

- **Advanced Filters:** Shows the ranges of accounts that this user has currently filtered.

- **Restrictions:** Displays the ranges of accounts the user has permission to access. If nothing is displayed, the user has permission to access all accounts. All account permissions settings are maintained by administrators.

- **Entry Restrictions:** If the user's permissions differ in accounts he can access vs accounts he may do entry, those restrictions can be seen under the various entry tabs. Entry Restrictions: applies to any type of entry. Any account ranges shown in the Budget Entry, Journal Entry, Invoice Entry, and PO Entry tabs will limit a user to the accounts he may use to do each type of entry.

Alert! When the accounts list is filtered, note the Advanced Filters button is highlighted. The Filter will remain on until you remove the filter. To do so, click on the Filter button and delete all rows (with the "x" icon). Click Save. When the filter has been removed, your accounts will once again be displayed.

When a filter has been set on accounts to browse, this filter also applies when paging forward/back through accounts on the Actuals/Budget entry screen. You may key an account number manually; but to access other accounts in your permission range, you must remove the filter.

If Object Tracking is used, the same settings are available in Records > Objects.