

Search Accounts using Filters

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Read on to learn how Admins can set filters using filter menus while searching Accounts in the Management Portal.

Overview

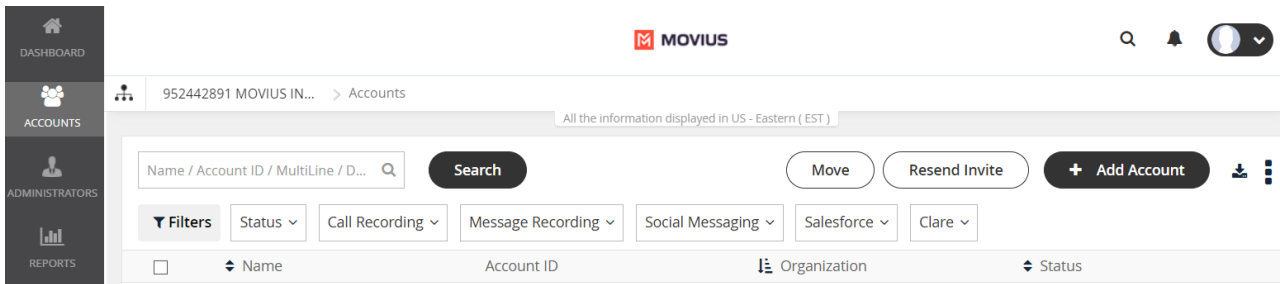
Filters menus help Admins search for accounts. This can be used to download a list of users with a certain status or feature or to perform bulk actions such as [Move](https://help.moviuscorp.com/help/move-users) and [Resend Invite](https://help.moviuscorp.com/help/resend-a-multiline-invitation).

Before you start

- An admin must have "Accounts" Privilege in their Role in the organization to do these instructions. See [What Admin Privileges are in Management Portal?](https://help.moviuscorp.com/help/what-admin-roles-mmp)

Available Filters

There are multiple filter menus available in Accounts Search. *Note: Management Portal will only display filter menus relevant to a company's deployment, so admins may not see all options listed below*



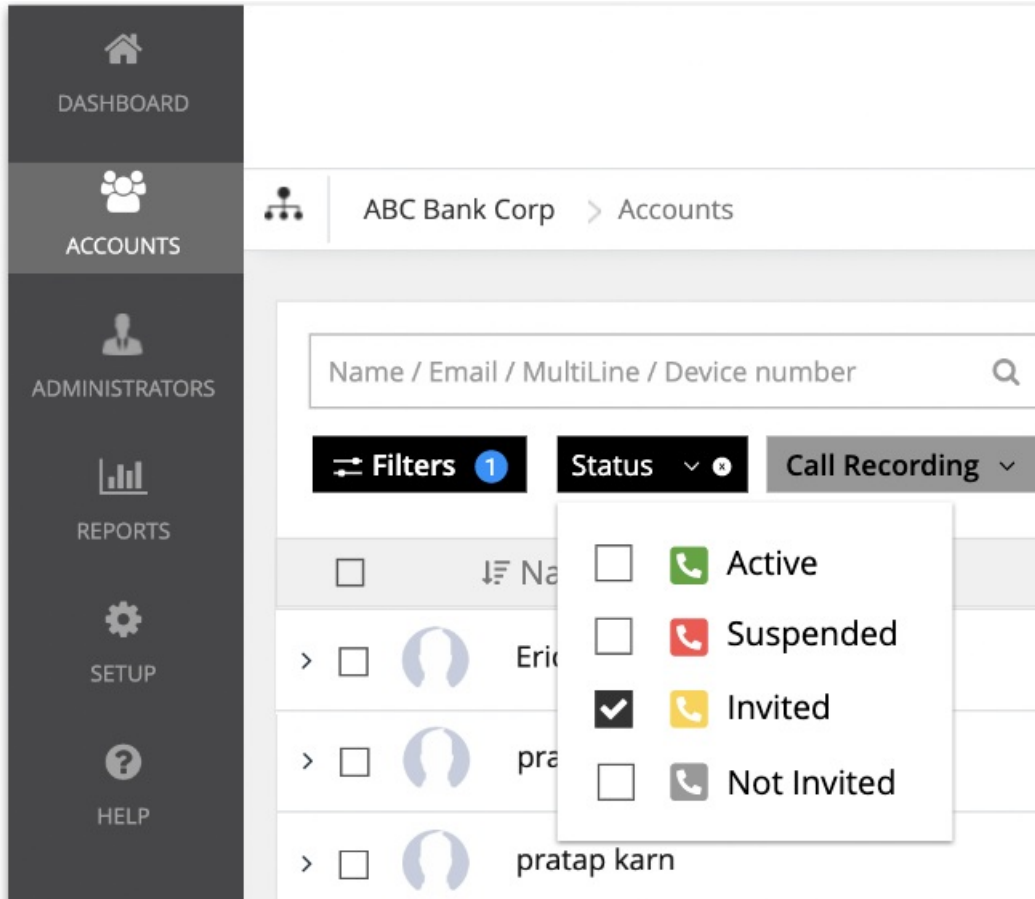
The screenshot shows the MOVIUS Accounts Search interface. The top navigation bar includes the MOVIUS logo, a search icon, a notification bell, and a user profile icon. The main content area displays the search results for 'Accounts' in the organization '952442891 MOVIUS IN...'. The search bar contains the text 'Name / Account ID / MultiLine / D...'. Below the search bar, there are several filter menus: 'Status', 'Call Recording', 'Message Recording', 'Social Messaging', 'Salesforce', and 'CLARE'. The 'Status' filter is currently expanded, showing options: 'Active', 'Invitation', 'Failed', 'Invited', and 'Not Invited'. The 'Add Account' button is visible on the right side of the search bar.

Filter Menu	Options	Description
Status	Active Invitation Failed Invited Not Invited	Returns users with the selected statuses. See also Search users and view invitation status
Call Recording	On/Off	Returns users based on having Call Recording
Message Recording	On/Off	Returns users based on having SMS Recording
Social Messaging/WhatsApp	On/Off	Returns users based on having Social Messaging Recording
Salesforce	On/Off	Returns users based on having Salesforce connector
CLARE	On/Off	Returns users based on having CLARE enabled

Apply Filters to Accounts Search

Use the filter menus with your search to display accounts based on status or feature set. You can select from multiple filter menus.

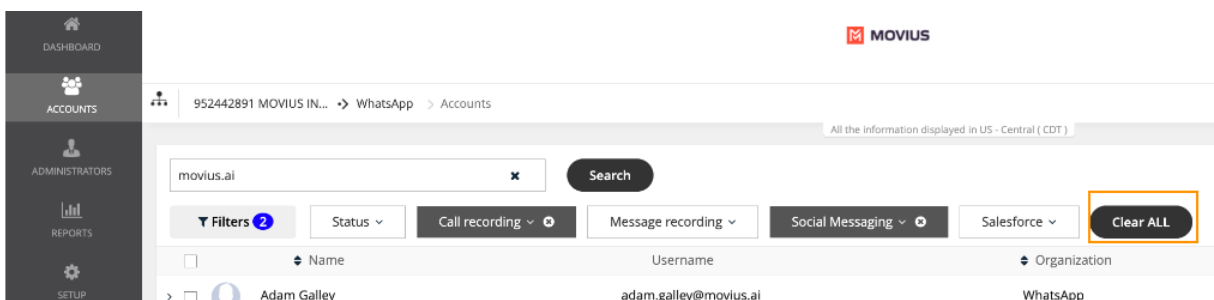
1. Select **Accounts** from the left side menu.
2. You will see many **Filter** menus to choose from. In this example we select **Status**, and can filter users based on what stage they are in the onboarding process.



3. When you select a Filter, you will see a blue notification icon for that Filter.

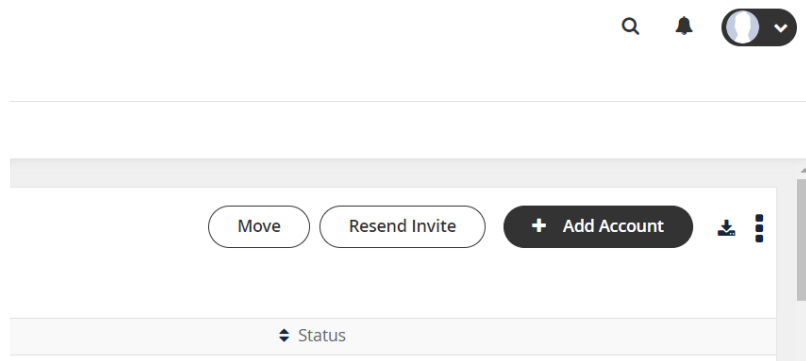


4. You can use **Filters** in combination with search. Just enter anything you want into the **Name / Email MultiLine / Device number** field above the Filters menu.
5. To start over, select the **Clear All** option.



Download users

To download filtered search results, use the **Download** icon  next to **+ Add Account**.



Note: it isn't necessary to select users before downloading.
