

Advanced Search Experience

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The search experience has been updated across all pages. This guide covers the redesigned search bar, the Advanced Search form, and the updated search results for Deals, People, Companies, and Addresses. Assets Advanced Search is unchanged.

Search Bar

The search bar appears at the top of every page. In the **Search For** dropdown, you select Deals, People, Companies, or Assets. Address records are not a separate Search For option; you reach them through the **Type of Contact** dropdown within a People or Companies search.

The elements are as follows:

Element	Description	New
Search For	Select the type of record to search for: Deals, People, Companies, or Assets. Address records are reached through the Type of Contact dropdown within a People or Companies search.	
By	Select the field to search by. Options change based on the Search For selection.	
Recent Searches	An option in the By dropdown. When selected, the search field becomes a list of your previous searches. Click any item to run that search immediately.	New
Search input field	Enter your search term. Press Enter or click the magnifying glass icon to run the search.	
Magnifying glass icon	Click to run the search. This replaces the previous Search button.	New
Sliders Icon	Click to access the Advanced Search form for more detailed filtering options. Previously represented as text; now shown as a sliders icon.	New

Advanced Search Form

The Advanced Search form appears below the search bar in an accordion labeled **Advanced search**.

The screenshot shows the 'LeaseAccelerator' interface. At the top, there's a search bar with 'Deals' selected in the 'Search For' dropdown and 'Document #' in the 'By' dropdown. Below this is the 'Advanced search' accordion, which is expanded. The title 'Search for Deals' is at the top of the accordion. The search criteria fields are arranged in a grid-like fashion:

- Document Type (dropdown), Number (text), Deal Status (dropdown)
- Date Range (dropdown), to (text)
- Participant Role (dropdown), Name (text), Company Name (text), City (text)
- State/Province (dropdown), Country (dropdown), Phone (text), E-mail Address (text)
- Deal Id (text), Deal Tag (dropdown), Maximum number of records to retrieve (dropdown set to 25)

A green 'Search' button is located at the bottom right of the expanded form. Below the expanded form is a collapsed version of the same form, labeled 'Search for Deals' and 'Advanced search'.

Search Results

After running a search, results appear below the collapsed Advanced Search form.

Accordion Behavior (NEW)

- The form is expanded by default when you navigate directly to the advanced search page without entering anything in the search field.
- The form is collapsed if you run a search from the search bar that returns multiple results.
- Click the **Advanced search** accordion header to expand or collapse the form at any time.

Deals

When Deals is selected in the **Search For** dropdown, the Advanced Search form shows Deals-specific search criteria. Fill in as many or as few fields as needed. If you fill in more than one field, a record must match all of them to appear in your results (AND logic).

Search for Deals

9 deals retrieved out of 9 deals that matched your criteria.

Advanced search

Evergreen Terminated/disposed Pin results

Deal #	BU	Ship To	Value	Lease Start Date	Term (mos.)	Status	Deal Tag	Actions
LA9501-2	Acme Headquarters	Reston	\$5,000,000.00	01/01/2018	60	Evergreen		Q
LA9501-4	Acme Headquarters	Reston	\$5,000,000.00	01/01/2018	60	Evergreen		Q
LA9501-5	Acme Headquarters	Reston	\$5,000,000.00	01/01/2018	60	Evergreen		Q
LA9501-1	Acme Headquarters	Reston	\$5,000,000.00	01/01/2018	60	Evergreen		Q
LA9501-3	Acme Headquarters	Reston	\$5,000,000.00	01/01/2018	60	Evergreen		Q

Search for Deals

9 deals retrieved out of 9 deals that matched your criteria.

Advanced search

Document Type Number Deal Status

Date Range To

Participant Role Name Company Name City

State/Province Country Phone E-mail Address

Deal ID Deal Tag Maximum number of records to retrieve

(Multiple fields will be searched with 'and' logic.) Search

Evergreen Terminated/disposed Pin results

Deal #	BU	Ship To	Value	Lease Start Date	Term (mos.)	Status	Deal Tag	Actions
LA9501-2	Acme Headquarters	Reston	\$5,000,000.00	01/01/2018	60	Evergreen		Q

People, Companies, and Addresses

When **People** or **Companies** is selected, the Advanced Search form shows the Contacts search. Use the **Type of Contact** dropdown to switch between People, Companies, and Addresses. The form fields update based on the Type of Contact you select.

Search for Contacts

Advanced search

Type of Contact

People

People

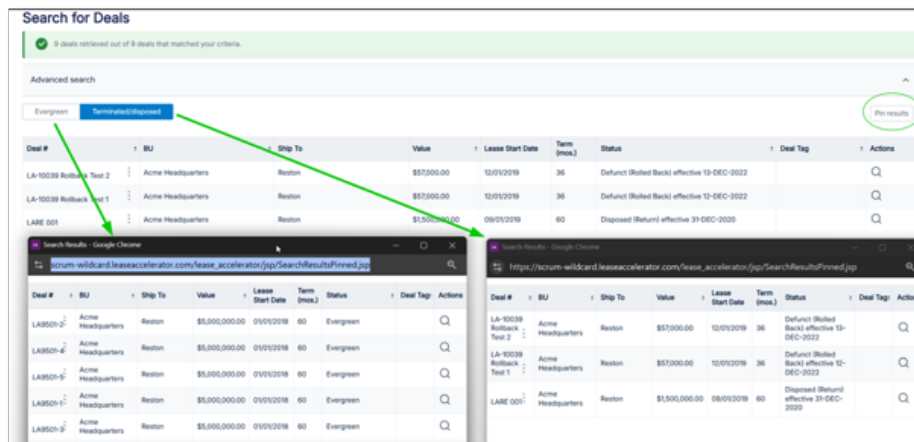
Companies

Addresses

Status Tabs (Deals)

Deals results are organized into tabs by deal status. The tabs displayed depend on which statuses appear in your results. Only statuses with matching records are shown. Examples include Active, Evergreen, Incomplete, Pre-origination, Renewed, and Terminated/disposed.

Click a tab to view records in that status. Your search criteria are preserved as you switch between tabs.



Results Table

The results table has been updated with the following features.

Feature	What changed
Actions Column	Moved from the far left to the far right of the table. Now labeled Actions. The column can contain multiple icons depending on the record.
Magnifying glass icon	Appears in the Actions column. Opens the deal history for that record.
Related Deal Icon	Appears in the Actions column where applicable. Not all deals include this icon.
Kebab menu (Deals)	Remains in its original position to the right of the deal number. Not moved to the Actions column.

Deal #	BU	Ship To	Value	Rental	Lease Start Date	Term (mos.)	Status	Deal Tag	Actions
DemoLVB	1215 Smoke Test	Arlington	\$4,000.00	\$400.00	02/09/2026	36	Active		Q
Lease 45644-M001	Manufacturing	jones	\$50,000.00	\$1,250.00	01/01/2026	20	Active		Q Q Q
TestBhavyaLVB-RFP	1215 Smoke Test	Arlington	\$1,100.00	\$550.00	01/21/2026	40	Active		Q

Pin Results (NEW)

The **Pin Results** button is located above and to the right of the results table and replaces the pushpin icon that used to be on the top left. Each status tab can be pinned separately. Clicking it opens that tab's results in a new window, preserving your current filters and sort order.

Active

Evergreen

Incomplete

Pre-origination

Renewed

Terminated/disposed

Pin results

Contact Results

People, Companies, and Addresses results follow the same table structure. The Actions column has moved to the far right of the table. Each record type displays relevant fields appropriate to that contact type (Name/Company Name, address information, contact information, and role).

Search for Contacts

Advanced search

3 contacts retrieved out of 3 contacts that matched your criteria.

Line #	☐	Name	Company name	Email address	Phone	Fax	Ledger codes	Actions
1	☐	User 01	LeaseAccelerator Services	psurve@leaseaccelerator.com				
2	☐	User 02	LeaseAccelerator Services	psurve@leaseaccelerator.com				
3	☐	User 03	LeaseAccelerator Services	psurve@leaseaccelerator.com				

Merge To