GET STARTED: SEARCH

SEARCH

The Search feature is denoted by a magnifying glass symbol at the top of the page.
- Click the magnifying glass symbol and the Search feature will open.
- NOTE- the magnifying glass symbol will change color as you move the cursor over it.

For the ‘Search by….’ Section:
- Select the item type for the Search in the dropdown list.
- You can search for a Contact, Transaction, Partner Name, Partner Number or Activity.

Blank text field:
- In the white band at top, type your Search criteria information in the text box (Name or Transaction number).
- Press Enter on your keyboard

Results:
- The results will appear onscreen
- Some information may display as a hyperlink that you can click to view more detail

The Wild Card is the percent symbol %. Use the % to substitute for missing information.
- For example, if you know part of a Prior Approval number, you can type %-22.1, then press Enter

- The system will search for possible matches and display the results
- When you search for a particular transaction such as a Prior Approval, the system might display any transaction that matches, such as associated Claims and Adjustments.
<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Transaction ID</th>
<th>Date Created</th>
<th>Currency</th>
<th>Amount</th>
<th>Status</th>
<th>Created By</th>
<th>Owner</th>
<th>Owner Client Reference Number</th>
<th>Fund</th>
<th>Fund Status</th>
<th>Program Name</th>
<th>Next Approver(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Claim</td>
<td>AICA-221071-22.1.1</td>
<td>09/08/2016</td>
<td>USD</td>
<td>1.00</td>
<td>Pending Approval</td>
<td>Chad</td>
<td><strong>Test WD USD partner [Testwp11rursd]</strong></td>
<td>Testwp11rursd</td>
<td>AMER: Q217 CS MDF</td>
<td>Active</td>
<td>WD Content Solutions Program</td>
<td>Channel Manager Level 1</td>
</tr>
<tr>
<td>Prior Approval</td>
<td>AICA-221071-22.2</td>
<td>08/31/2016</td>
<td>USD</td>
<td>500.00</td>
<td>Approved</td>
<td>Chad</td>
<td><strong>Test WD USD partner [Testwp11rursd]</strong></td>
<td>Testwp11rursd</td>
<td>AMER: Q217 CS MDF</td>
<td>Active</td>
<td>WD Content Solutions Program</td>
<td></td>
</tr>
</tbody>
</table>