
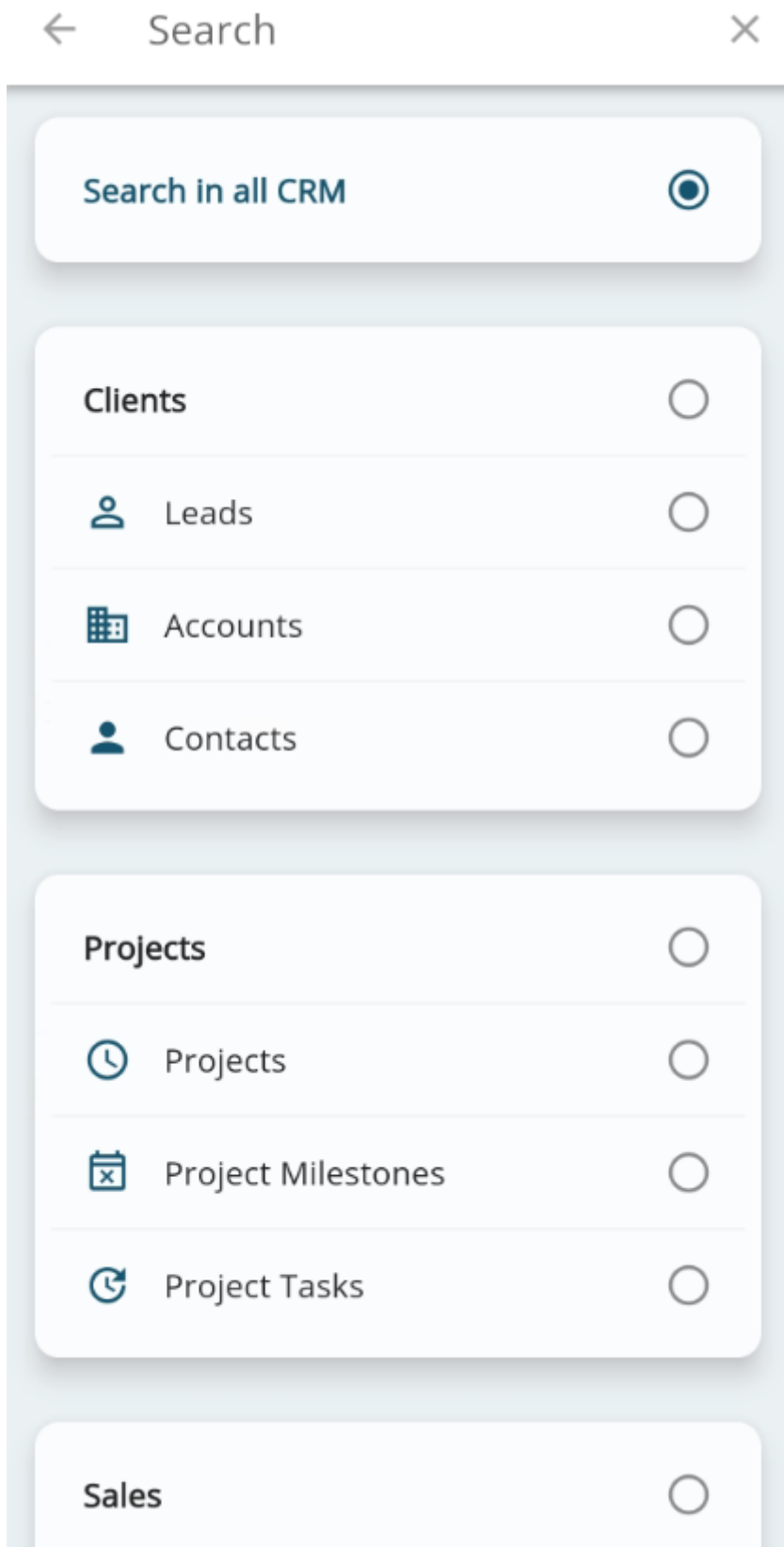


6. Global Research

When it is necessary to search for a record across the entire CRM, start by clicking the magnifying glass icon at the top right . This opens the screen shown below containing some options for refining the search:

1. Search entire CRM
2. Clients
3. Projects
4. Sales
5. Inventory
6. Collaborations
7. Others



Global Search detail

How to run a Global Search?

- After typing a search key word, if the “Clients” button is clicked a pop-up opens containing the search results.

- Clicking on “Others” makes it possible to choose to search within other modules (e.g. Plans, Sales Orders, Potentials, Quotations, etc.).
 - Pressing the “Search entire CRM” button searches the entire database.
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