
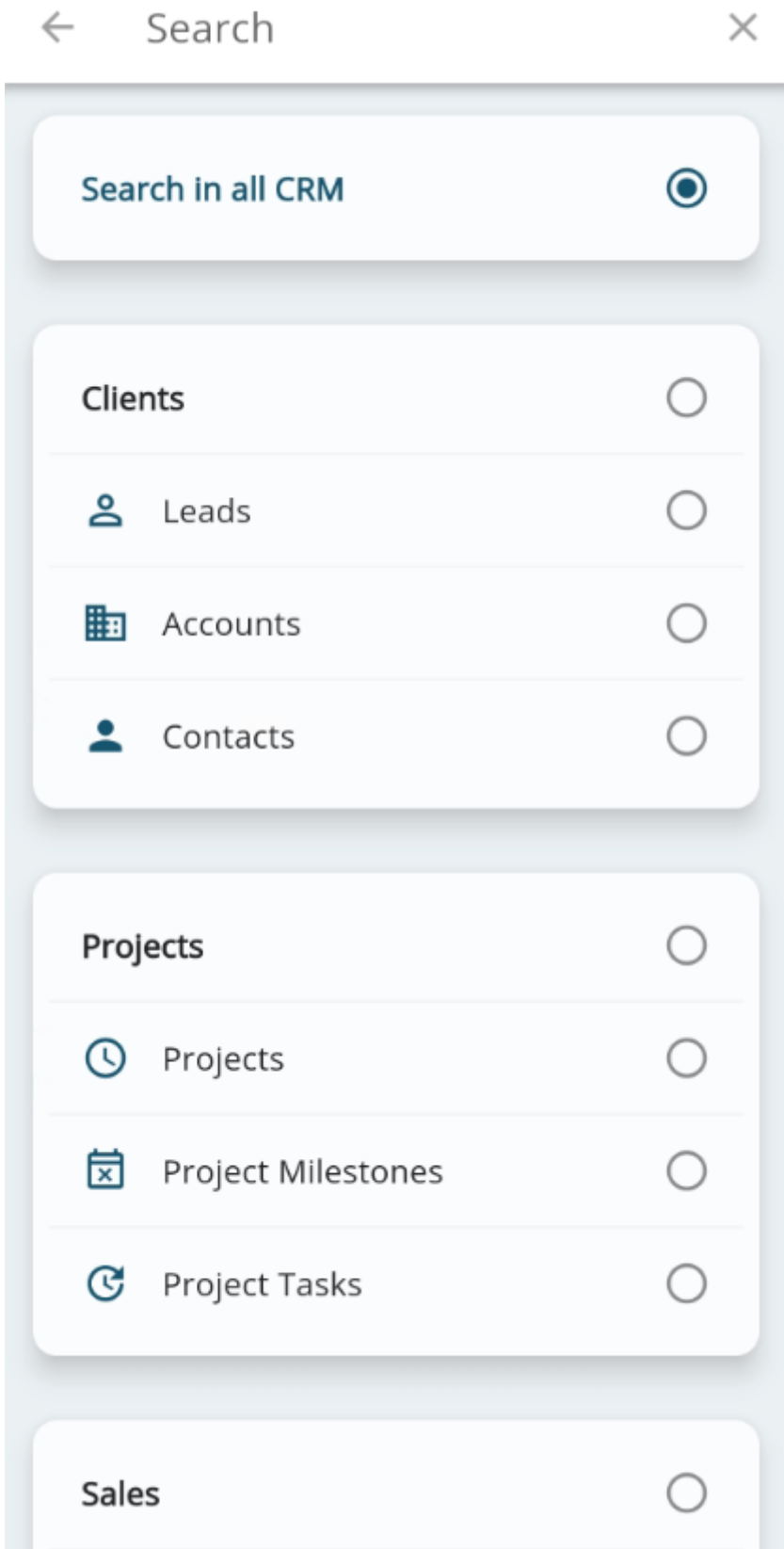


# 6. Global Research

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.
- 

Revision #3

Created 2022-07-14 13:23:56 UTC by Admin

Updated 2022-07-14 13:28:29 UTC by Admin