

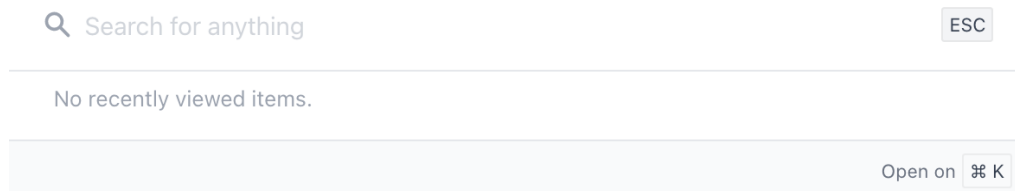
How To Use The Universal Search Feature

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The Universal Search feature allows you to quickly search for contacts, payments, and opportunities within your system. You can easily click on any found entry or create a new entry if the query yields no results. Check out these simple steps for how to use the Universal Search:

Step 1: Navigate to the dashboard menu.

- On the top left of your screen, you'll see a search bar.
- Click on it, and a popup will appear.
- In the popup window, you can type the query you wish to search for.



- In this example, we'll search for "test".
- On the left, you can sort the search by All Categories, Contacts, Opportunities, or Payments.

The screenshot shows a search interface with a search bar at the top containing the text 'Test'. Below the search bar, there is a sidebar on the left with a list of categories: 'All Categories' (highlighted with a red arrow), 'Contacts', 'Opportunities', and 'Payments'. The main area displays search results under the heading 'SEARCH: CONTACTS' and 'TOTAL: 127'. The results list several contacts, each with a name, email address, and phone number. At the bottom right, there is a button labeled 'Open on' followed by a keyboard shortcut icon and the letter 'K'.

Category	Name	Email	Phone
Contacts	Test Contact	test@thedemoaccount.com	+18055551234
	Test@Emaildemo.Com	test@emaildemo.com	
	Test@Testmail.Com	test@testmail.com	
	Mary Tester	mary@thedemoaccount.com	+14065309764
	Sally Test	sallytest@thedemoaccount.com	
	Testing Person		
	Kathleen Test	test4@testeremail.com	
	John Test	test3@testeremail.com	
	Testing Person	email@test.com	+17133772903
	Tester Person		

- Click on any found Contacts, Opportunities, or Payments to quickly navigate to the page with the appropriate information.
- Return to the search bar and repeat this as many times as you need to.

Step 2: Add a Contact or Opportunity from the Search tab

- In both the Contacts and Opportunities tabs, if your search doesn't yield a result, you can create a new contact or opportunity right from here.
- Click the "add" hyperlink that appears within the tab, and fill out the appropriate information for the contact or opportunity you wish to create.

Testing123

ESC

All Categories

Contacts

Opportunities

Payments

No maching result for 'Testing123'

Add opportunity 'Testing123'

Open on K