



SuiteCRM Global Search

User Guide

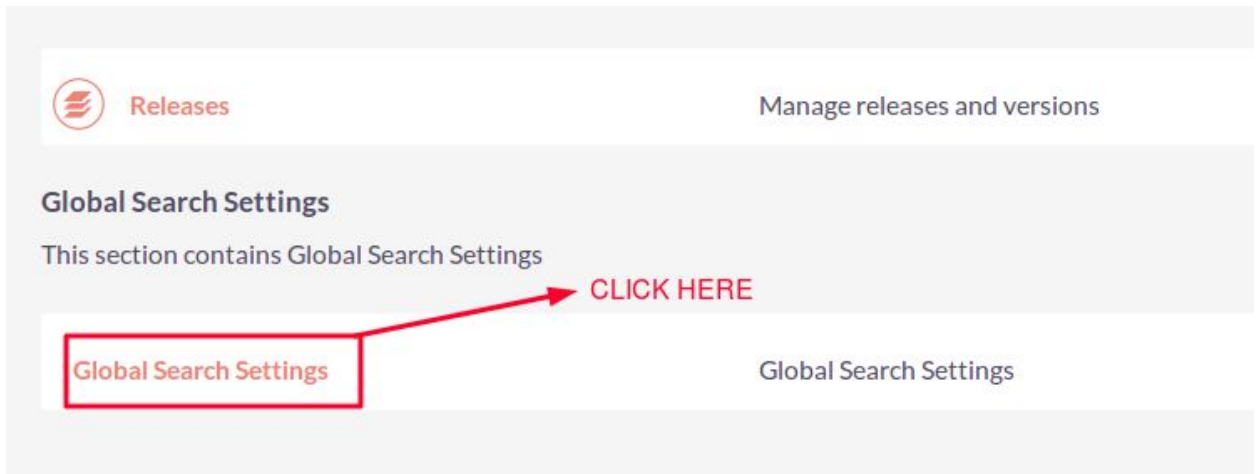
Pre-requisites

Please follow the below steps before installing the Global Search.

1. Log in as an Administrator.
2. Verify the CRM version should be compatible with Global Search.
3. Then install Global Search.

User Guide

1. Go to the admin section and click on Global Search Settings.



2. Global Search Settings.

Name :- Enter a name for settings.

Search Modules :- Select those modules whom you want to perform search functionality.

Enable Search -: Check this box if you want to enable the search for all selected modules.

Search Action -: We have three search actions.

1. **Begins with -:** If you want to find records by starting alphabets then select this option.
2. **Equal -:** If you want to find records by exact name of record then select this option
3. **Includes -:** If you want to find records middle name of record then select this option.

The screenshot displays the 'Global Search Settings' interface. At the top, there are 'SAVE' and 'CANCEL' buttons. Below them, the 'BASIC' tab is active. The 'Name:' field contains 'Default Global Search Settings'. The 'Enable Search:' checkbox is unchecked, with a red arrow pointing to it and the text 'Check this box to enable search'. The 'Search Modules:' dropdown is open, showing a list of modules: 'Prospects', 'ProspectLists', 'Documents', 'Cases', 'Project', and 'Bugs'. A red arrow points to this dropdown with the text 'Select Modules'. The 'Search Action:' dropdown is set to 'Begins with', with a red arrow pointing to it and the text 'Select type of search'.