



Faster Global Search for SuiteCRM

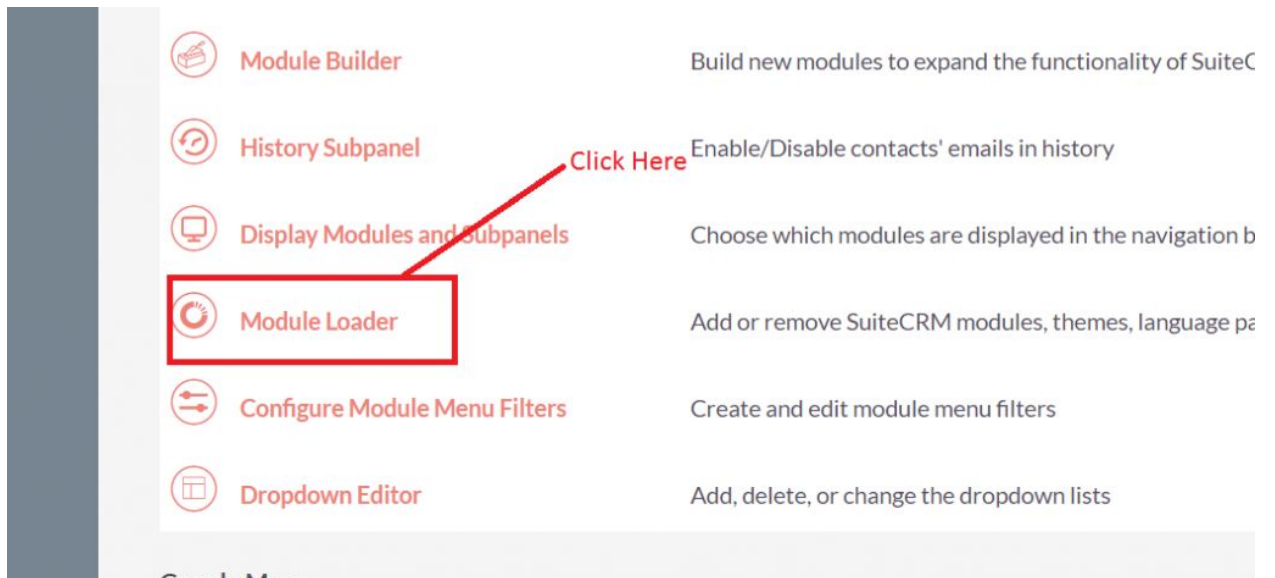
Pre-requisites

Please follow the below steps before installing the Global Search.

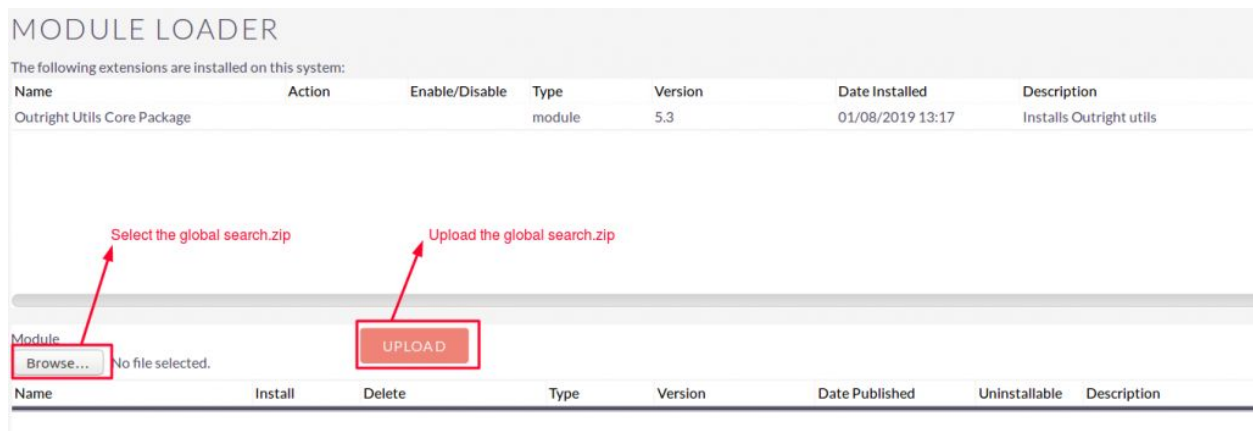
1. Log in as an Administrator.
2. Verify the CRM version should be compatible with Global Search.
3. CRM should have the Outright utils file, if not then install the Outright Utils package first then install Global Search.

Installation Guide:-

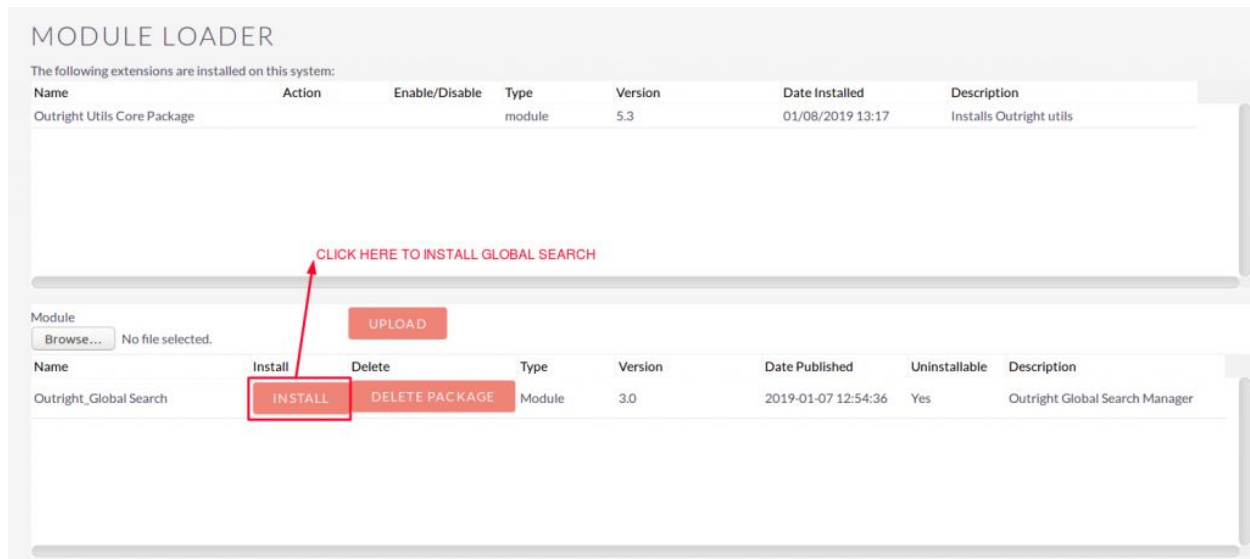
1. Go to the Administration page.
2. Click on “**Module Loader**” to install the package.



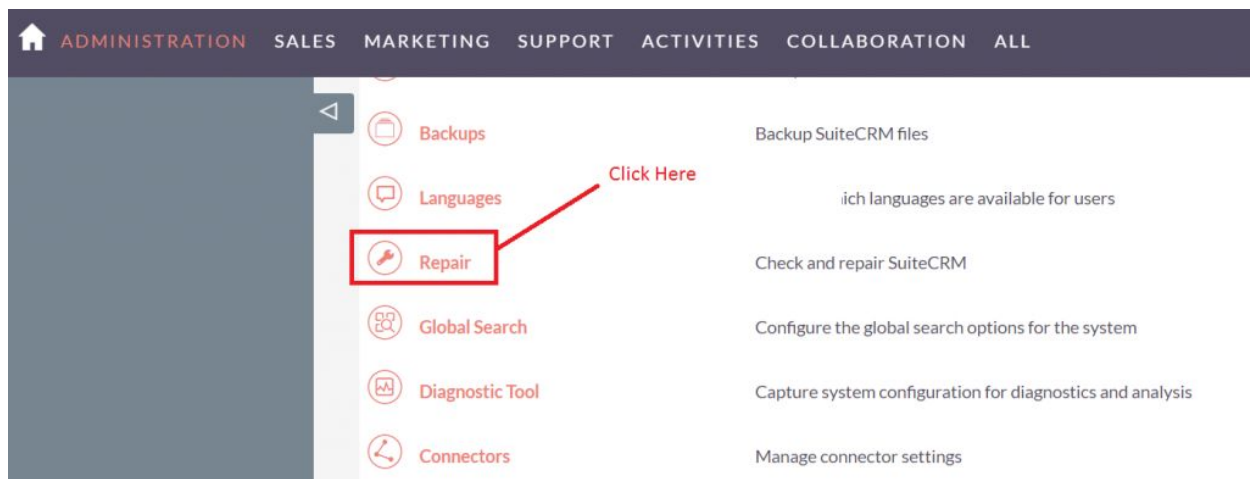
3. Click on “**Choose File**” button and select the Global Search.zip



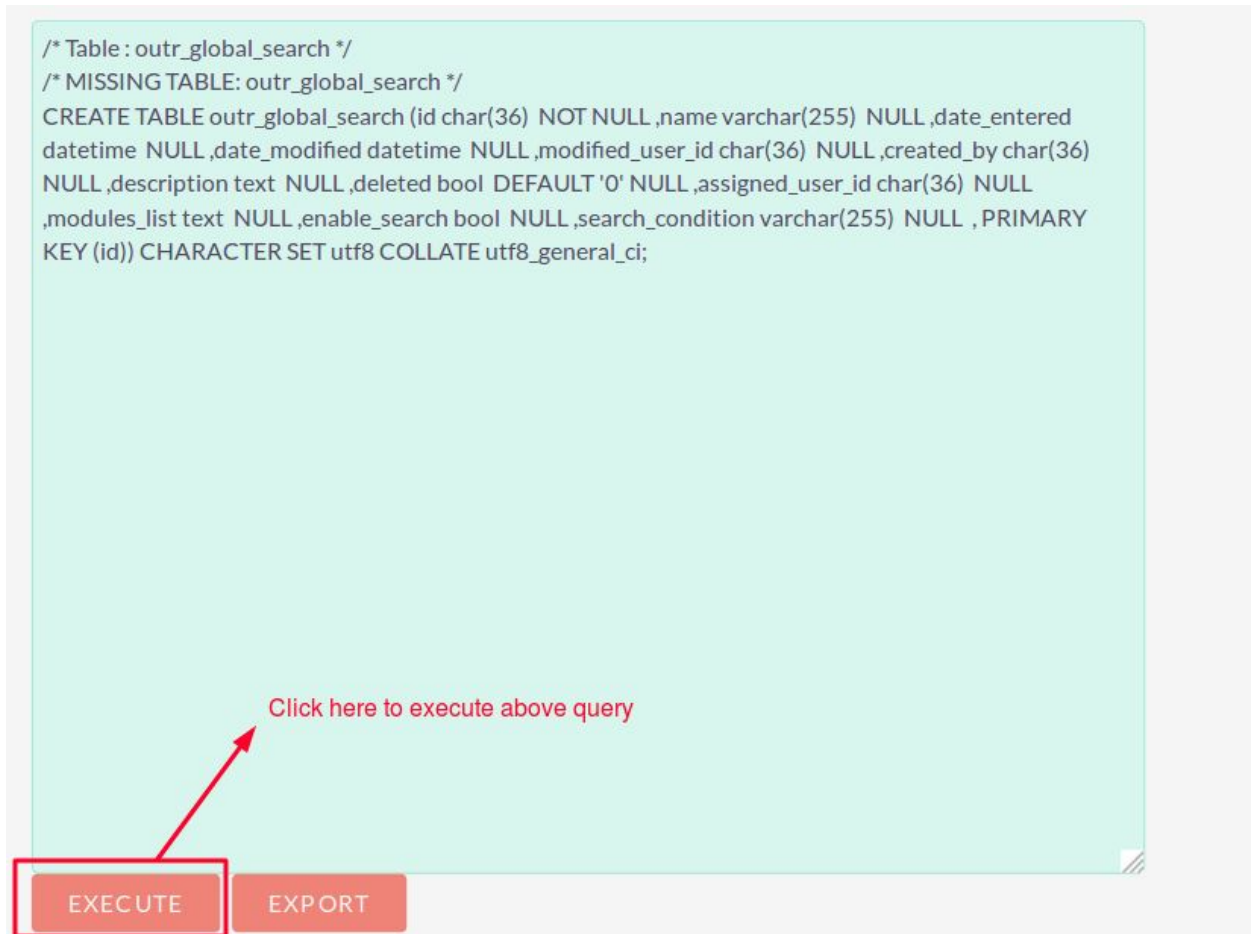
4. Click on **"Upload"** to upload the file in CRM and then click on the Install button.



5. Again go to the Administration page and click on repair.



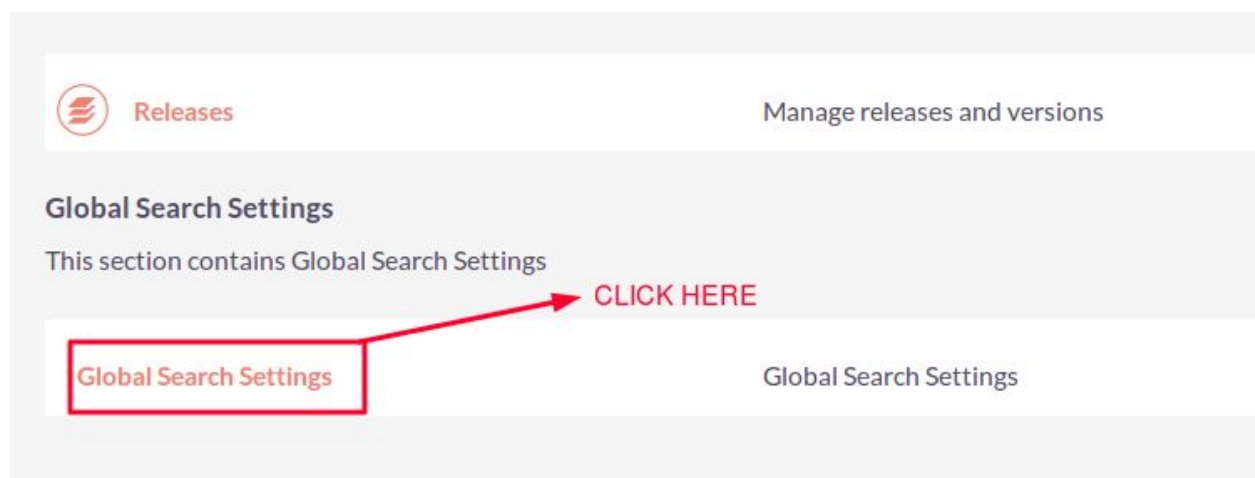
6. Click on "**Quick Repair and Rebuild**" and click on execute button.



NOTE: after installing each plugin, It is mandatory to repair and execute.

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 shows the 'Global Search' settings interface. At the top, there are 'SAVE' and 'CANCEL' buttons. Below them is a 'BASIC' tab. The interface is divided into two main sections: 'Name:' and 'Search Modules:'. The 'Name:' section has a text input field with 'Default Global Search Settings' and an 'Enable Search:' checkbox. The 'Search Modules:' section has a dropdown menu with a list of modules: Prospects, ProspectLists, Documents, Cases, Project, and Bugs. The 'Search Action:' section has a dropdown menu with 'Begins with' selected. Red arrows point to the 'Enable Search:' checkbox with the text 'Check this box to enable search', to the 'Search Modules:' dropdown with the text 'Select Modules', and to the 'Search Action:' dropdown with the text 'Select type of search'.

SAVE CANCEL

BASIC

Name: * Default Global Search Settings

Search Modules: Prospects ProspectLists Documents Cases Project Bugs

Enable Search: ☐ Check this box to enable search

Search Action: Begins with Select type of search