

Quick Search for VTIGER CRM 6.x

Introduction

Very useful utility that helps you search your record in vtiger 6.x.x. Quick Search is improved searching tool that allows you to seek records in whole vtiger and set on which fields you want to search.

- default setting of fields to search are fields of “All filter” for module
- every user have option to define searching on specific fields for each module
- option to turn on/turn off searching for each module also in Emails
- results are shown in div window
- installation via module manager or via vtiger Marketplace
- supported all standard and custom modules
- option for each user have own fields in Quick Search

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License agreement

- The Quick Search License will be referred to as "The license" in the remainder of this text.
- This irrevocable, perpetual license covers all versions 2.xx of Quick Search.
- This license gives the holder right to install Quick Search on ONE productive vtiger CRM installation and ONE develop vtiger CRM installation for unlimited users.
- The license holder is allowed to make modifications to the Quick Search sources but in no event will the original copyright holders of this library be held responsible for action or actions resulting from any modifications of the source.
- The license holder is not required to publicize or otherwise make available any software used in conjunction with Quick Search.
- The license holder may not re-distribute the library or versions thereof to third party without prior written permission of the copyright holder.
- Quick Search License does not allow the library to be redistributed as part of another product.
- The license may be transferred to another vtiger CRM installation only with prior written permission.
- The wording of this license may change without notice for future versions of Quick Search.

**It is strongly required to deactivate the license before moving installation to another server (different url) in order to avoid any license conflicts.
After movement and repeated installation you can reactivate your license.**

Terms and conditions

We accept all major credit cards, PayPal and Bank transfer. Our deliveries:

Credit Card: delivered immediately

PayPal: delivered immediately

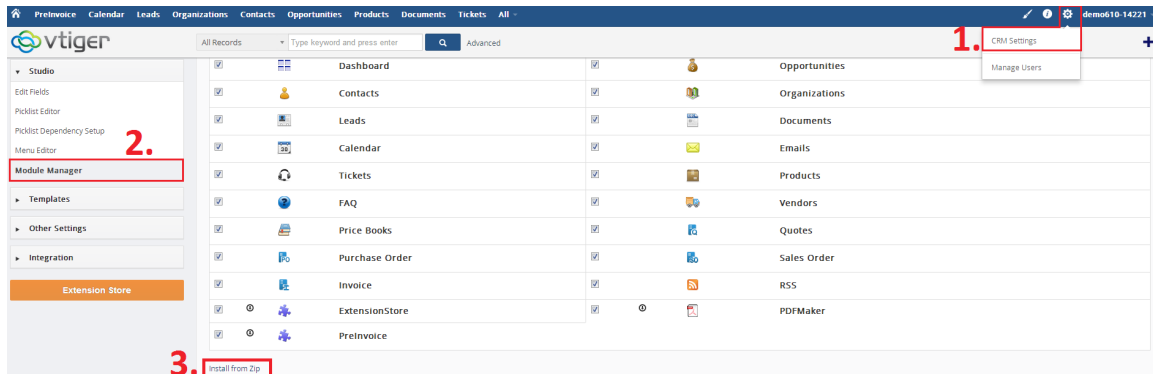
Bank transfer: delivered in 2 - 5 days

After payment you will obtain email with info for download.

1 How to install Quick Search

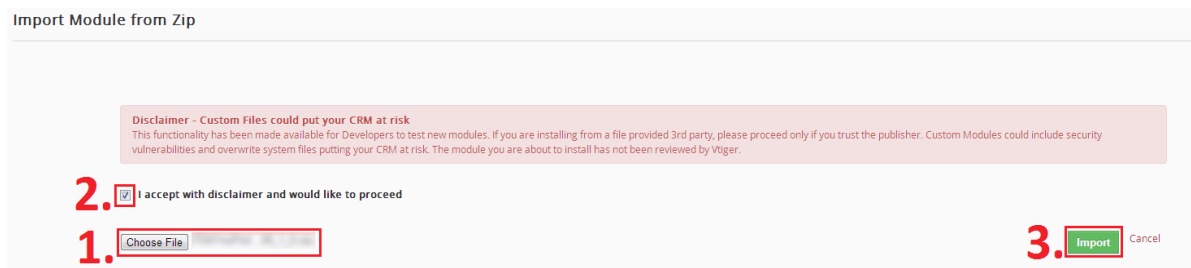
Please provide following steps in order to install Quick Search:

1. Install the .zip (package) file of the Quick Search module via **CRM Settings -> Module Manager**. Click on the **Install from Zip** .



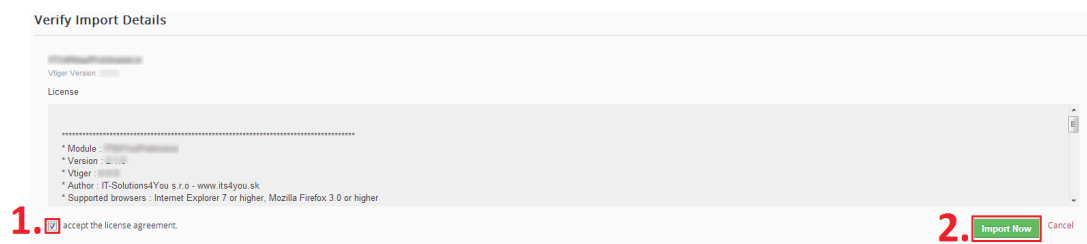
Picture 1.1: Installation of Quick Search – Step 1

2. Select the .zip (package) file that you downloaded from our shop. Please check that you accepted the disclaimer and would like to proceed. Click on the **Import** button.



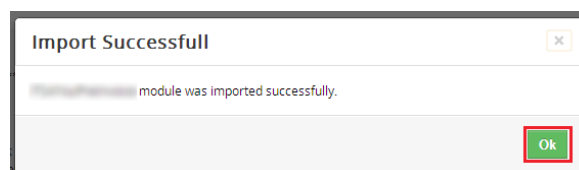
Picture 1.2: Installation of Quick Search – Step 2

3. Verify the import details parsed from the .zip (package) file. Please check that you accepted the license agreement and click **Import Now** to proceed **Cancel** or to cancel.



Picture 1.3: Installation of Quick Search – Step 3

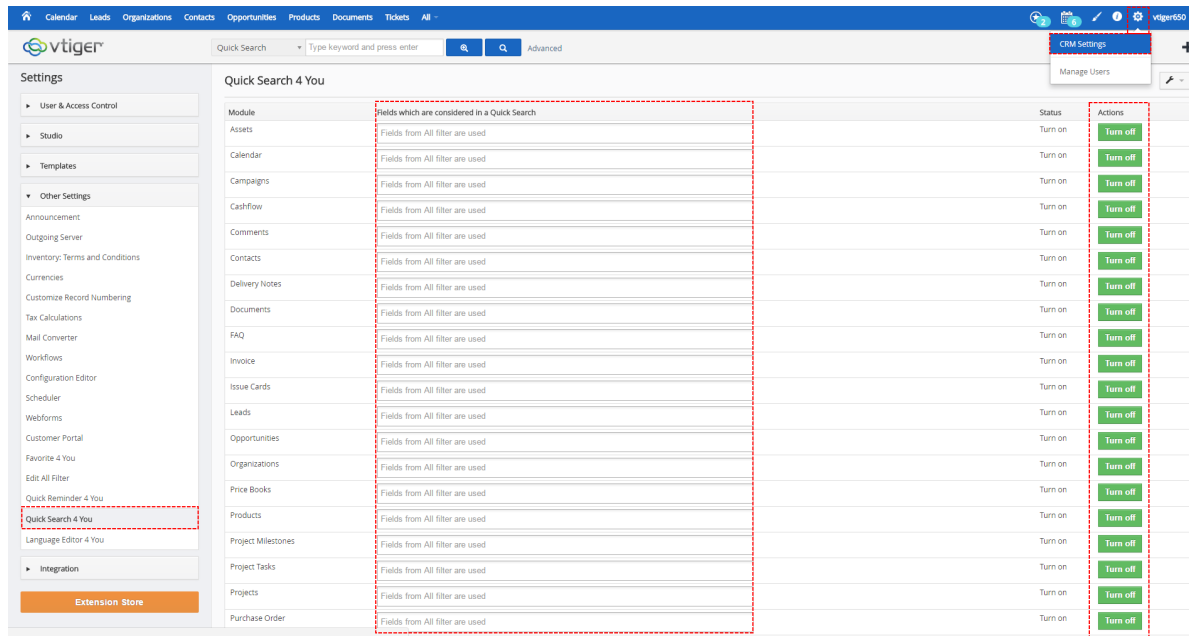
4. Click on **Ok** button to complete the module import.



Picture 1.4: Installation of Quick Search – Step 4

2 Before you start using Quick Search

After installation there is for all same default setting (every module is turn on and fields from “All filter” are used to search). Admin has option to make first initiation for all user together in **CRM Settings->Other Settings->Quick Search**.

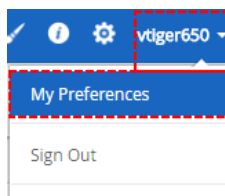


Picture 2.1: First Admin's settings for all users

Then each user can use settings of admin or define own fields or modules to search on in private settings. If user change settings then next admin settings have no effect to user's settings.

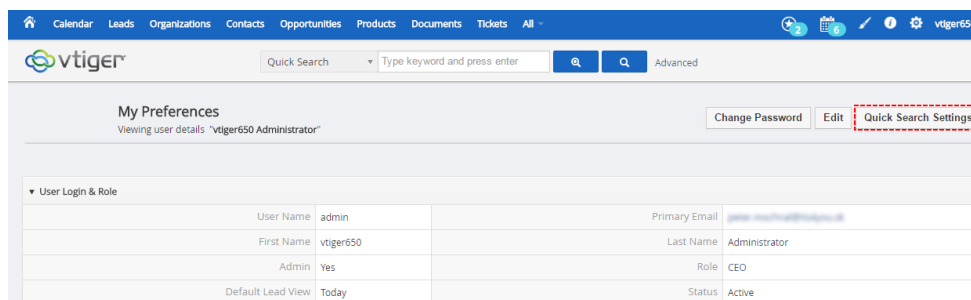
To set your own settings please provide following steps:

1. Choose My Preferences



Picture 2.2: Quick Search settings of user

2. Now choose Quick Search 4 You Settings



Picture 2.3: Quick Search settings of user

3. Here you can define fields and modules

Quick Search 4 You Settings

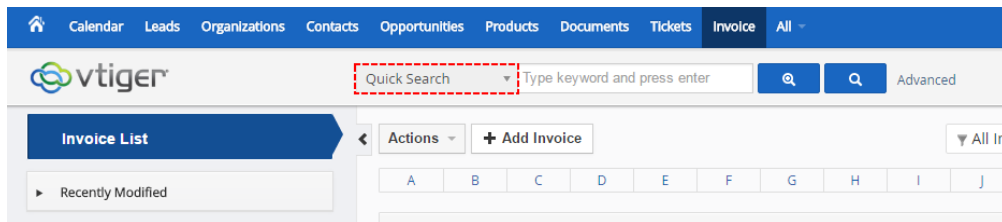
Module	Fields which are considered in a Quick Search	Status	Actions
Assets	Fields from All filter are used	Turn on	Turn off
Calendar	Fields from All filter are used	Turn on	Turn off
Campaigns	Fields from All filter are used	Turn off	Turn on
Cashflow	Fields from All filter are used	Turn on	Turn off
Comments	Fields from All filter are used	Turn on	Turn off
Contacts	Mailing Country x Other Country x	Turn on	Turn off
Delivery Notes	Fields from All filter are used	Turn on	Turn off
Documents	Fields from All filter are used	Turn on	Turn off
FAQ	Fields from All filter are used	Turn on	Turn off
Invoice	Fields from All filter are used	Turn on	Turn off
Issue Cards	Fields from All filter are used	Turn on	Turn off
Leads	Fields from All filter are used	Turn on	Turn off
Opportunities	Fields from All filter are used	Turn on	Turn off
Organizations	Fields from All filter are used	Turn on	Turn off
Price Books	Fields from All filter are used	Turn on	Turn off
Products	Fields from All filter are used	Turn on	Turn off
Project Milestones	Fields from All filter are used	Turn on	Turn off
Project Tasks	Fields from All filter are used	Turn on	Turn off
Projects	Fields from All filter are used	Turn on	Turn off

Picture 2.4: Quick Search setting of user


4. Now, you can search by your own settings

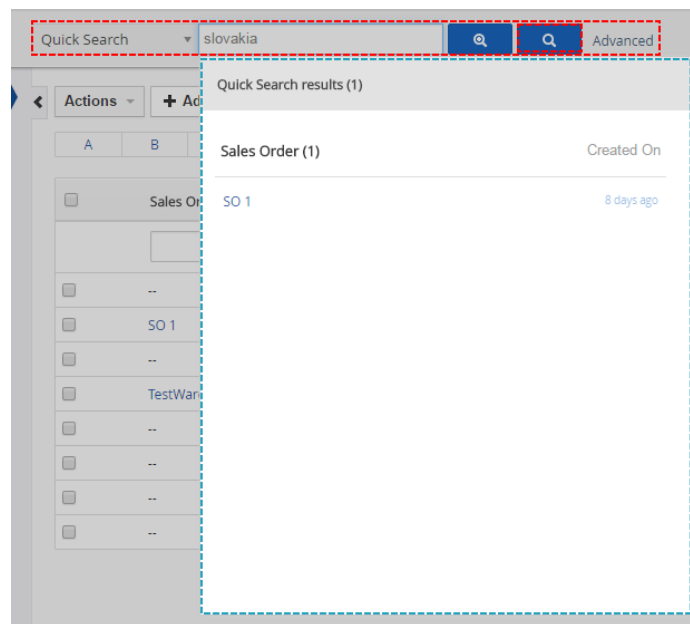
3 How to use Quick Search

Quick Search option is set as default searching option.




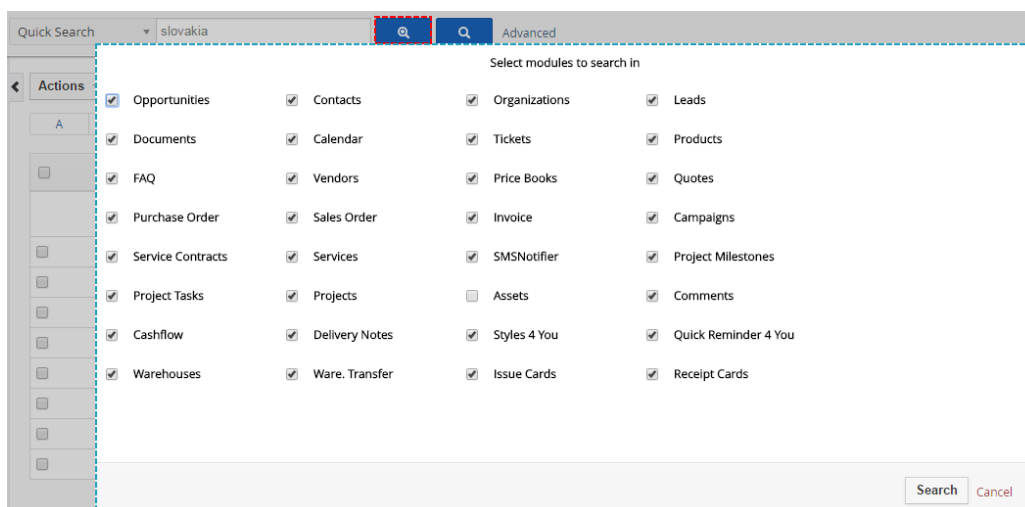
Picture 3.1: How to use Quick Search

Searching you can start if you press *Enter* or click on .



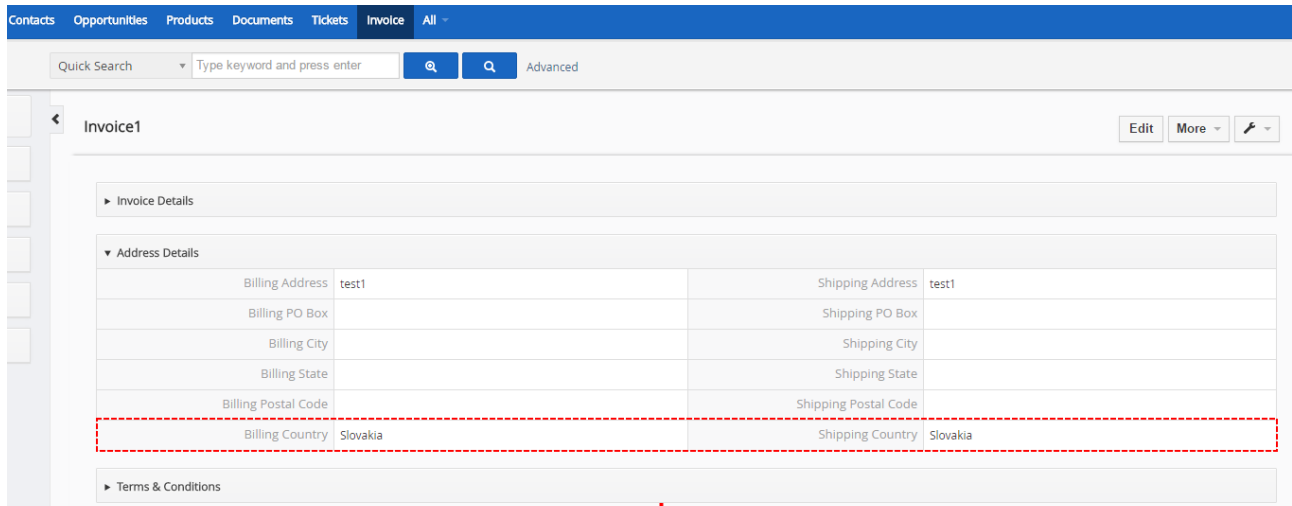
Picture 3.2: How to use Quick Search

You are able also switch off/on modules before searching by .

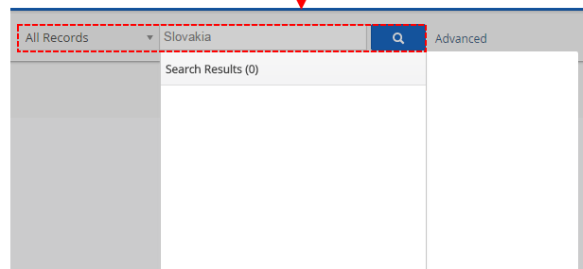


Picture 3.3: How to enable/disable module for searching

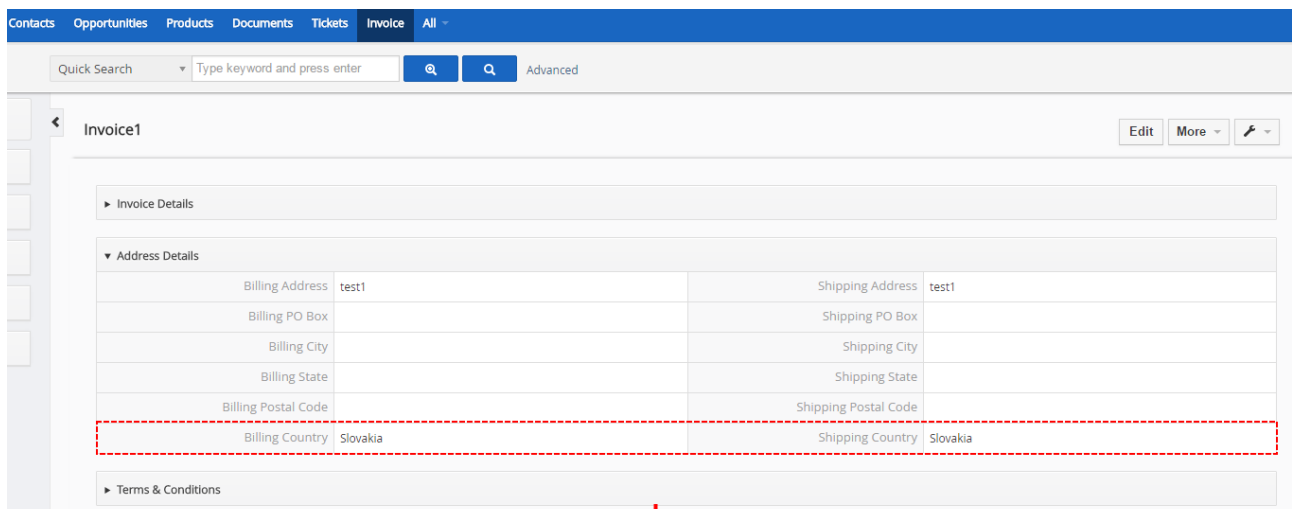
Now, you can compare results of searching by vtiger and Quick Search extension:



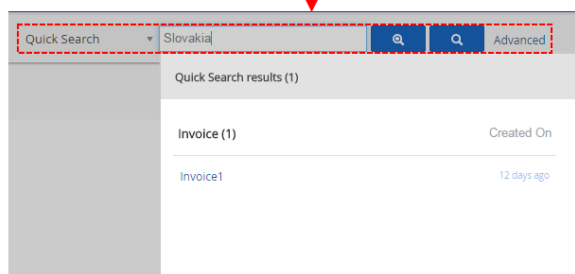
Standard vtiger searching option



Picture 3.4: Standard vtiger searching option



Quick Search option

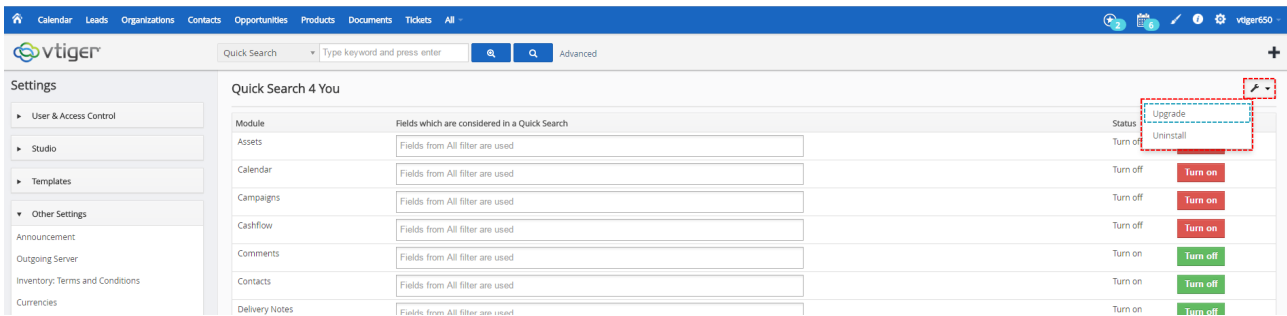


Picture 3.5: Quick Search option

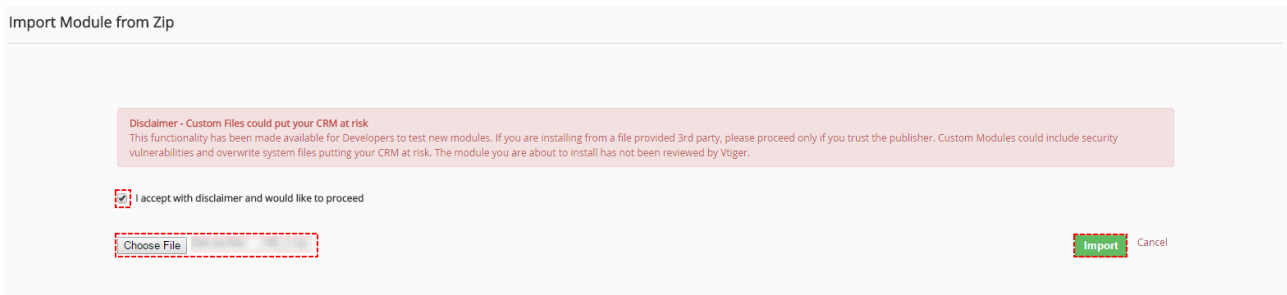
4 Settings

4.1 Upgrade

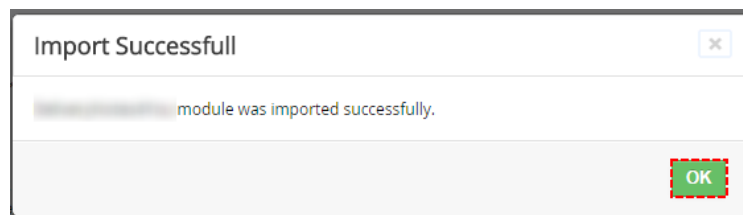
The upgrade of the Quick Search is initiated in the same way as Quick Search installation (How to install Quick Search) or click on Upgrade link in Settings of Quick Search (Picture 4.1). So please refer to above installation part for details how to initiate the import of the module from the file. After upgrade the notification about successful upgrade is shown (Picture 4.3)and click on **OK** button.



Picture 4.1: Upgrade of Quick Search



Picture 4.2: Upgrade of Quick Search

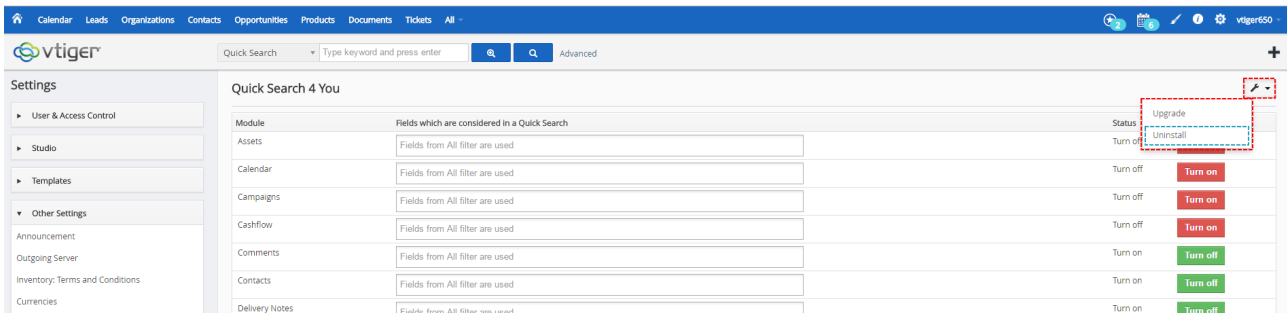


Picture 4.3: Upgrade of Quick Search

4.2 Uninstall

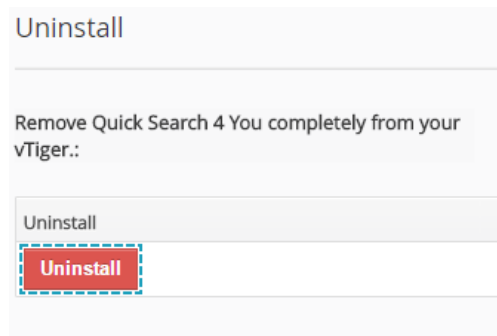
If you want to remove Quick Search from your vtiger please provide following steps:

1. In Settings area of Quick Search please click on  button and choose **Uninstall** option



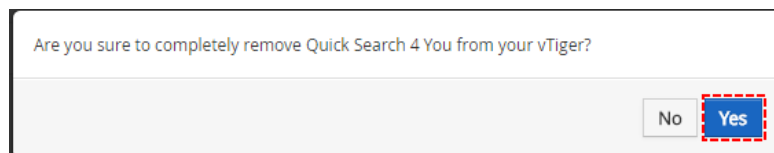
Picture 4.4: Uninstall of Quick Search – step 1

2. Click on **Uninstall** button



Picture 4.5: Uninstall of Quick Search – step 2

3. Confirm uninstall by **Yes** button



Picture 4.6: Uninstall of Quick Search – step 3

Now, Quick Search has been removed from your vtiger a. To use Quick Search again you need to provide installation steps (see chapter How to install Quick Search).

Change log of Quick Search

- January 2017: **600.1.0**
 - first initiate

Change log of Manual for Quick Search

- January 2017: manual is based on Quick Search: **600.1.0**
 - first initiate version for vtiger 6.5