

Global search

| | |
|------------------------------|-----------------------|
| Prepared By: | Rasiga Priya |
| Designed By: | Kiru, Yogesh & Rasiga |
| Feature requested by: | Vivek |
| Stakeholder: | Internal request |
| Ticket ID: | REQ-I2020 |
| Date: | DEC 12,2025 |

Prototype: [Figma Link](#)

Feature Overview

The Global Search and Advanced Search features enable users to quickly retrieve information across multiple modules such as Contacts, Accounts, Jobs, Tasks, and Appointments.

The Global Search provides instant suggestions based on the user's input, while the Advanced Search allows deeper, multi-criteria filtering.

Multi language should support the search functionality.

Functional Requirements

Global Search

Search Input

1. The system must allow the user to enter search text in the Global Search bar.
2. The system should start displaying results only after the user enters **a minimum of 3 characters**.
3. The search field must show a placeholder text:
“Type at least 3 characters to search”.
4. The search overlay can be opened by:
 - a. Clicking the search icon, or
 - b. Pressing **Ctrl/Cmd + K** (keyboard shortcut).

Lovely Blinds | Dashboard | **All jobs** | Tasks | Calendar | Production management | Purchase Orders | More ▾

All Jobs

Search everything (Ctrl+K)

Default view | Backorder view | Invoice view | Appointment view

Search

☒ All X
 ☐ Contacts
 ☐ Accounts
 ☐ All Jobs
 ☐ Tasks
 ☐ Appointments

☒ Matt Rufer Contact
☒ Matt Blinds Accounts

| | Job ref no | Organisation name | Account ref | Company name | Job status | Last name | Contact type | Cost price | Net price | |
|-------------------------------------|------------|----------------------|-------------|--------------|-------------|-----------|--------------|------------|-----------|---|
| <input checked="" type="checkbox"/> | BM001 | Joe smith | JBOB0051 | JB Blinds | Invoiced | Hussain | Trade | 15253.35 | 655.67 | : |
| <input type="checkbox"/> | BM002 | Urban blinds | LYLB0096 | Lovely Blind | Invoiced | Gladson | Contract | 5674.732 | 5674.732 | : |
| <input type="checkbox"/> | BM1276 | BlindMatrix pvt, ltd | JBOB0050 | JB Blinds | Invoiced | Michel | Domestic | 3423.43 | 3423.43 | : |
| <input type="checkbox"/> | BM1246 | ABC blinds | JBOB0049 | JB Blinds | Lead | Ben | Domestic | 2343.56 | 2343.56 | : |
| <input type="checkbox"/> | BM1248 | Rainbo & co | JBOB0048 | JB Blinds | Agent order | Hussain | Trade | 655.67 | 655.67 | : |
| <input type="checkbox"/> | BM1257 | BlindMatrix pvt, ltd | JBOB0047 | JB Blinds | Quotes | Hussain | Contract | 5674.732 | 5674.732 | : |
| <input type="checkbox"/> | BM1276 | TBS blinds | LYLB0095 | Lovely Blind | Quotes | Michel | Domestic | 3423.43 | 3423.43 | : |
| <input type="checkbox"/> | BM1246 | Joe smith | LYLB0094 | Lovely Blind | Lead | Alying | Domestic | 1234.99 | 1234.99 | : |
| <input type="checkbox"/> | BM1234 | Rainbo & co | LYLB0093 | Lovely Blind | Agent order | Gladson | Domestic | 1112.54 | 1112.54 | : |
| <input type="checkbox"/> | BM1236 | BlindMatrix pvt, ltd | LYLB0092 | Lovely Blind | Agent order | Michels | Contract | 7332.43 | 7332.43 | : |
| <input type="checkbox"/> | BM1237 | Rainbo & co | LYLB0091 | Lovely Blind | Agent order | Gladson | Trade | 12657.987 | 12657.987 | : |

Total records :00

Lovely Blinds | Dashboard | **All jobs** | Tasks | Calendar | Production management | Purchase Orders | More ▾

All Jobs

Search Ma

Type at least 3 characters to search

Default view | Backorder view | Invoice view | Appointment view

Search

☒ All X
 ☐ Contacts
 ☐ Accounts
 ☐ All Jobs
 ☐ Tasks
 ☐ Appointments

☒ Matt Rufer Contact
☒ Matt Blinds Accounts

| | Job ref no | Organisation name | Account ref | Company name | Job status | Last name | Contact type | Cost price | Net price | |
|-------------------------------------|------------|----------------------|-------------|--------------|-------------|-----------|--------------|------------|-----------|---|
| <input checked="" type="checkbox"/> | BM001 | Joe smith | JBOB0051 | JB Blinds | Invoiced | Hussain | Trade | 15253.35 | 655.67 | : |
| <input type="checkbox"/> | BM002 | Urban blinds | LYLB0096 | Lovely Blind | Invoiced | Gladson | Contract | 5674.732 | 5674.732 | : |
| <input type="checkbox"/> | BM1276 | BlindMatrix pvt, ltd | JBOB0050 | JB Blinds | Invoiced | Michel | Domestic | 3423.43 | 3423.43 | : |
| <input type="checkbox"/> | BM1246 | ABC blinds | JBOB0049 | JB Blinds | Lead | Ben | Domestic | 2343.56 | 2343.56 | : |
| <input type="checkbox"/> | BM1248 | Rainbo & co | JBOB0048 | JB Blinds | Agent order | Hussain | Trade | 655.67 | 655.67 | : |
| <input type="checkbox"/> | BM1257 | BlindMatrix pvt, ltd | JBOB0047 | JB Blinds | Quotes | Hussain | Contract | 5674.732 | 5674.732 | : |
| <input type="checkbox"/> | BM1276 | TBS blinds | LYLB0095 | Lovely Blind | Quotes | Michel | Domestic | 3423.43 | 3423.43 | : |
| <input type="checkbox"/> | BM1246 | Joe smith | LYLB0094 | Lovely Blind | Lead | Alying | Domestic | 1234.99 | 1234.99 | : |
| <input type="checkbox"/> | BM1234 | Rainbo & co | LYLB0093 | Lovely Blind | Agent order | Gladson | Domestic | 1112.54 | 1112.54 | : |
| <input type="checkbox"/> | BM1236 | BlindMatrix pvt, ltd | LYLB0092 | Lovely Blind | Agent order | Michels | Contract | 7332.43 | 7332.43 | : |
| <input type="checkbox"/> | BM1237 | Rainbo & co | LYLB0091 | Lovely Blind | Agent order | Gladson | Trade | 12657.987 | 12657.987 | : |

Total records :00

Search Results Display

- The system must display results grouped under categories:
 - Contacts
 - Accounts
 - All Jobs

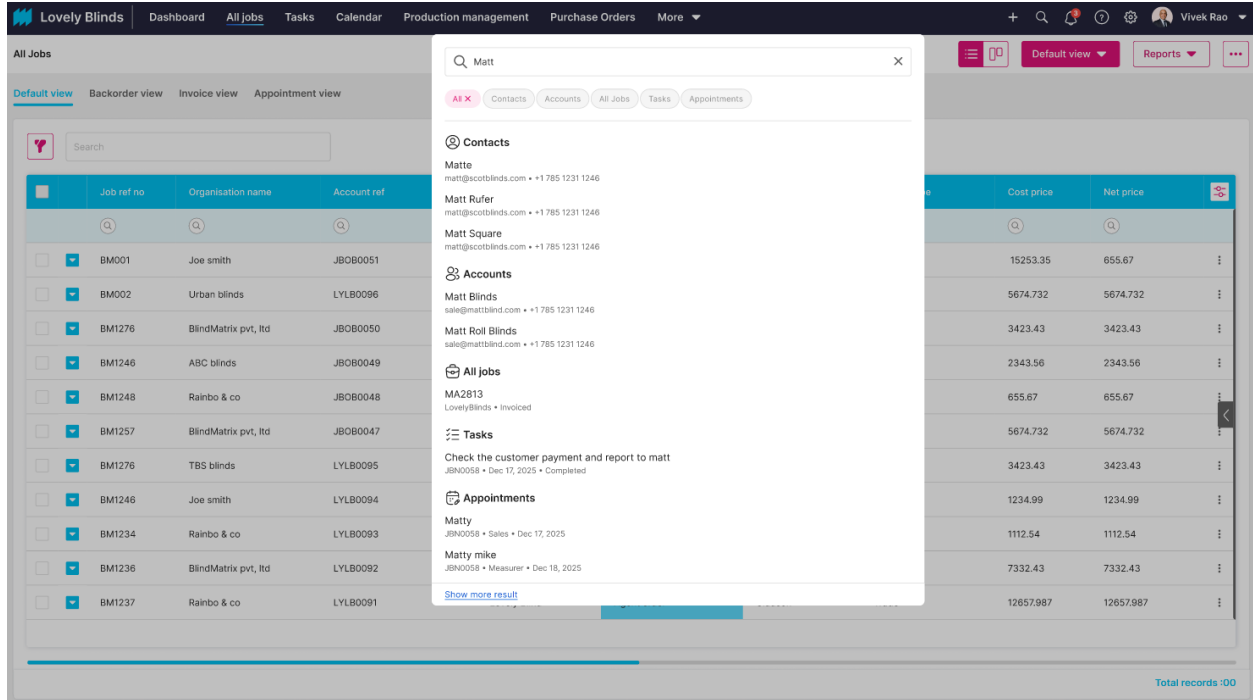
- d. Tasks
- e. Appointments

Clicking on an item in the search results will open the associated screen. For the **Contacts**, **Tasks**, and **Appointments** modules, the details will open in a **popup overlay** on top of the search screen.

All other modules will open in a **separate tab**.

2. Each result should display relevant details depending on the module:

| Module | Details Displayed in Search Results |
|---------------------|--|
| Contacts | Name, Email address, Phone number |
| Accounts | Email address, Phone number, company name |
| Jobs | Job number , Company name, Job status |
| Tasks | Task subject, Task date, Task status, Job number |
| Appointments | Appointment date, appointment type/role, App. Staff(s), Job number |



The screenshot shows the BlindMatrix CRM interface. The top navigation bar includes 'Lovely Blinds', 'Dashboard', 'All jobs', 'Tasks', 'Calendar', 'Production management', 'Purchase Orders', and 'More'. The user 'Vivek Rao' is logged in. The main content area is titled 'All Jobs' and has tabs for 'Default view', 'Backorder view', 'Invoice view', and 'Appointment view'. A search bar is present, and a modal window displays search results for 'Matt'.

Search Results for 'Matt':

- Contacts:**
 - Matte**
matt@scotblinds.com • +1 785 1231 1246
 - Matt Rufer**
matt@scotblinds.com • +1 785 1231 1246
 - Matt Square**
matt@scotblinds.com • +1 785 1231 1246
- Accounts:**
 - Matt Blinds**
sale@mattblind.com • +1 785 1231 1246
 - Matt Roll Blinds**
sale@mattblind.com • +1 785 1231 1246
- All Jobs:**
 - MA2813**
LovelyBlinds • Invoiced
- Tasks:**
 - Check the customer payment and report to matt**
JBN0058 • Dec 17, 2025 • Completed
- Appointments:**
 - Matty**
JBN0058 • Sales • Dec 17, 2025
 - Matty mike**
JBN0058 • Measurer • Dec 18, 2025

[Show more result](#)

Table Data (Visible in Background):

| Job ref no | Organisation name | Account ref | Cost price | Net price |
|------------|----------------------|-------------|------------|-----------|
| BM001 | Joe smith | JBOB0051 | 15253.35 | 655.67 |
| BM002 | Urban blinds | LYLB0096 | 5674.732 | 5674.732 |
| BM1276 | BlindMatrix pvt, ltd | JBOB0050 | 3423.43 | 3423.43 |
| BM1246 | ABC blinds | JBOB0049 | 2343.56 | 2343.56 |
| BM1248 | Rainbo & co | JBOB0048 | 655.67 | 655.67 |
| BM1257 | BlindMatrix pvt, ltd | JBOB0047 | 5674.732 | 5674.732 |
| BM1276 | TBS blinds | LYLB0095 | 3423.43 | 3423.43 |
| BM1246 | Joe smith | LYLB0094 | 1234.99 | 1234.99 |
| BM1234 | Rainbo & co | LYLB0093 | 1112.54 | 1112.54 |
| BM1236 | BlindMatrix pvt, ltd | LYLB0092 | 7332.43 | 7332.43 |
| BM1237 | Rainbo & co | LYLB0091 | 12657.987 | 12657.987 |

Total records : 100

Search History

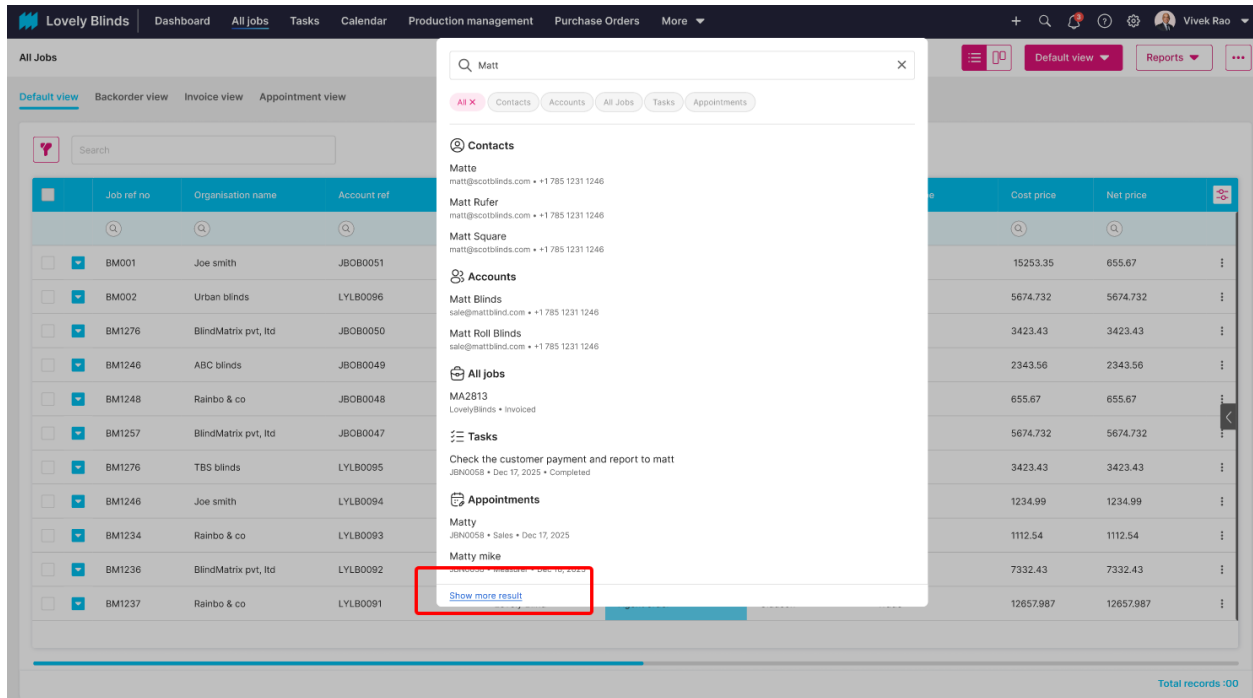
1. The system must maintain a list of the user's recent searches.
2. Search history should appear when the user clicks inside the search bar without typing.
3. Search history items should display:
 - a. Name
 - b. Module type (Contact, Account, etc.)
4. Clicking on a history item should open the corresponding record.

The screenshot displays the BlindMatrix CRM interface. At the top, there's a navigation bar with tabs: Dashboard, All jobs, Tasks, Calendar, Production management, Purchase Orders, and More. A user profile for 'Vivek Rao' is visible in the top right. Below the navigation bar, there's a search bar with the placeholder 'Search everything' and a '(Ctrl+K)' hint. A dropdown menu is open, showing search results for 'Matt Ruler' (Contact) and 'Matt Blinds' (Accounts). The main area shows a table of jobs with columns: Job ref no, Organisation name, Account ref, Company name, Job status, Last name, Contact type, Cost price, and Net price. The table contains 13 rows of job data. At the bottom right, it says 'Total records: 00' and 'Activate M'.

| Job ref no | Organisation name | Account ref | Company name | Job status | Last name | Contact type | Cost price | Net price |
|------------|----------------------|-------------|--------------|-------------|-----------|--------------|------------|-----------|
| BM001 | Joe smith | JOB00051 | JB Blinds | Invoiced | Hussain | Trade | 15253.35 | 655.67 |
| BM002 | Urban blinds | LYLB0096 | Lovely Blind | Invoiced | Gladson | Contract | 5674.732 | 5674.732 |
| BM1276 | BlindMatrix pvt, ltd | JOB00050 | JB Blinds | Invoiced | Michel | Domestic | 3423.43 | 3423.43 |
| BM1246 | ABC blinds | JOB00049 | JB Blinds | Lead | Ben | Domestic | 2343.56 | 2343.56 |
| BM1248 | Rainbo & co | JOB00048 | JB Blinds | Agent order | Hussain | Trade | 655.67 | 655.67 |
| BM1257 | BlindMatrix pvt, ltd | JOB00047 | JB Blinds | Quotes | Hussain | Contract | 5674.732 | 5674.732 |
| BM1276 | TBS blinds | LYLB0095 | Lovely Blind | Quotes | Michel | Domestic | 3423.43 | 3423.43 |
| BM1246 | Joe smith | LYLB0094 | Lovely Blind | Lead | Alying | Domestic | 1234.99 | 1234.99 |
| BM1234 | Rainbo & co | LYLB0093 | Lovely Blind | Agent order | Gladson | Domestic | 1112.54 | 1112.54 |
| BM1236 | BlindMatrix pvt, ltd | LYLB0092 | Lovely Blind | Agent order | Michels | Contract | 7332.43 | 7332.43 |
| BM1237 | Rainbo & co | LYLB0091 | Lovely Blind | Agent order | Gladson | Trade | 12657.987 | 12657.987 |

Advanced Search Behavior & UI

1. The Global Search panel must display an **“Advanced search”** link at the bottom.
2. Clicking this link must open the **Advanced Search** screen.



The screenshot displays the BlindMatrix CRM interface. The top navigation bar includes 'Lovely Blinds', 'Dashboard', 'All jobs', 'Tasks', 'Calendar', 'Production management', 'Purchase Orders', and 'More'. A search bar at the top right shows 'Matt' with a dropdown menu listing 'All X', 'Contacts', 'Accounts', 'All Jobs', 'Tasks', and 'Appointments'. The main content area is divided into two sections. On the left, under 'All Jobs', there is a table with columns 'Job ref no', 'Organisation name', and 'Account ref'. On the right, a search results panel for 'Matt' is displayed, showing results for 'Contacts', 'Accounts', 'All jobs', 'Tasks', and 'Appointments'. A red box highlights the 'Show more result' link at the bottom of the search results panel.

| Job ref no | Organisation name | Account ref |
|------------|----------------------|-------------|
| BM001 | Joe smith | JOB00051 |
| BM002 | Urban blinds | LYLB0096 |
| BM1276 | BlindMatrix pvt, ltd | JOB00050 |
| BM1246 | ABC blinds | JOB00049 |
| BM1248 | Rainbo & co | JOB00048 |
| BM1257 | BlindMatrix pvt, ltd | JOB00047 |
| BM1276 | TBS blinds | LYLB0095 |
| BM1246 | Joe smith | LYLB0094 |
| BM1234 | Rainbo & co | LYLB0093 |
| BM1236 | BlindMatrix pvt, ltd | LYLB0092 |
| BM1237 | Rainbo & co | LYLB0091 |

| Cost price | Net price |
|------------|-----------|
| 15253.35 | 655.67 |
| 5674.732 | 5674.732 |
| 3423.43 | 3423.43 |
| 2343.56 | 2343.56 |
| 655.67 | 655.67 |
| 5674.732 | 5674.732 |
| 3423.43 | 3423.43 |
| 1234.99 | 1234.99 |
| 1112.54 | 1112.54 |
| 7332.43 | 7332.43 |
| 12657.987 | 12657.987 |

The **Advanced Search screen** is a powerful global search tool that lets users quickly find information across multiple modules in Blind Matrix such as Contacts, Accounts, Jobs, Tasks, and Appointments.

When a user enters a keyword (example: “*Matt*”), the system searches across all enabled modules and displays structured results in a single consolidated view.

Lovely Blinds | Dashboard | All jobs | Tasks | Calendar | Production management | Purchase Orders | More ▾

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All Jobs

Default view ▾

🔍 Matt

Contacts (20) 1-10 < >

| First name | Last name | Email | Phone | Account type |
|---------------|-----------|--------------------|------------|--------------|
| Matt | | joesmith@gmail.com | 7448363420 | Trade |
| Mattaraja | smith | smith@gmail.com | 7448363420 | Domestic |
| Matt Rufer | Matrix | matrix@gmail.com | 7448363420 | Domestic |
| Matt Bolt | ABC | ABC@gmail.com | 7448363420 | Domestic |
| Matt Circle | Rainbo | Rainbo@gmail.com | 7448363420 | Domestic |
| Matt Square | Matrix | Matrix@gmail.com | 7448363420 | Domestic |
| Matt man | TBS | TBS@gmail.com | 7448363420 | Domestic |
| Matt murugan | Joe | joe@gmail.com | 7448363420 | Trade |
| Matt Triangle | Rainbo | Rainbo@gmail.com | 7448363420 | Trade |
| Matt vel | Matrix | matrix@gmail.com | 7448363420 | Trade |

Accounts (20) 1-10 < >

| Company name | Email | Phone | Account type | Organisation name |
|--------------|-------|-------|--------------|-------------------|
|--------------|-------|-------|--------------|-------------------|

Close

Total records :00

Lovely Blinds | Dashboard | All jobs | Tasks | Calendar | Production management | Purchase Orders | More ▾

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All Jobs

Default view ▾

🔍 Matt

Accounts (20) 1-10 < >

| Company name | Email | Phone | Account type | Organisation name |
|---------------|--------------------|------------|--------------|-------------------|
| Matt | joesmith@gmail.com | 7448363420 | Trade | Blindmatrix |
| Mattaraja | smith@gmail.com | 7448363420 | Domestic | Blindmatrix |
| Matt Rufer | matrix@gmail.com | 7448363420 | Domestic | Blindmatrix |
| Matt Bolt | ABC@gmail.com | 7448363420 | Domestic | Blindmatrix |
| Matt Circle | Rainbo@gmail.com | 7448363420 | Domestic | Blindmatrix |
| Matt Square | Matrix@gmail.com | 7448363420 | Domestic | Blindmatrix |
| Matt man | TBS@gmail.com | 7448363420 | Domestic | Blindmatrix |
| Matt murugan | joe@gmail.com | 7448363420 | Trade | Blindmatrix |
| Matt Triangle | Rainbo@gmail.com | 7448363420 | Trade | Blindmatrix |
| Matt vel | matrix@gmail.com | 7448363420 | Trade | Blindmatrix |

Jobs (20) 1-10 < >

| Job ref No. | Company name | Job status | Account type | Organisation name |
|-------------|--------------|------------|--------------|-------------------|
|-------------|--------------|------------|--------------|-------------------|

Close

Total records :00

Lovely Blinds | Dashboard | **All jobs** | Tasks | Calendar | Production management | Purchase Orders | More ▾

Search:

Jobs (20) 1-10 < >

| Job ref No | Company name | Job status | Account type | Organisation name |
|------------|--------------|------------|--------------|-------------------|
| JBN0058 | Surya & co | Invoiced | Trade | Blindmatrix |
| JBN0060 | Kingpin | Invoiced | Domestic | Blindmatrix |
| JBN0062 | Kingpin | Order | Domestic | Blindmatrix |
| JBN0064 | Kingpin | Order | Domestic | Blindmatrix |
| JBN0066 | Blinds&co | Order | Domestic | Blindmatrix |
| JBN0070 | Surya & co | Order | Domestic | Blindmatrix |
| JBN0072 | Surya & co | Order | Domestic | Blindmatrix |
| JBN0074 | Kingpin | Invoiced | Trade | Blindmatrix |
| JBN0076 | Kingpin | Order | Trade | Blindmatrix |
| JBN0076 | Blinds&co | Order | Trade | Blindmatrix |

Tasks (20) 1-10 < >

| Task Date | Subject | Job ref No | Mark as completed | Staff |
|-----------|---------|------------|-------------------|-------|
|-----------|---------|------------|-------------------|-------|

Close

Total records :00

Lovely Blinds | Dashboard | **All jobs** | Tasks | Calendar | Production management | Purchase Orders | More ▾

Search:

Appointments (20) 1-10 < >

| Staff | Appointment type | Job ref No | Created date | Start time | End time |
|---------------|------------------|------------|--------------|------------|----------|
| Matt | Measurer | JBN0058 | 10-01-2026 | 12:00:00 | 12:30:00 |
| Mattaraja | Sales | JBN0060 | 10-01-2026 | 14:00:00 | 14:30:00 |
| Matt Rufer | Sales | JBN0062 | 10-01-2026 | 14:15:00 | 14:40:00 |
| Matt Bolt | Sales | JBN0064 | 10-01-2026 | 12:15:00 | 12:35:00 |
| Matt Circle | Sales | JBN0066 | 10-01-2026 | 05:15:00 | 05:40:00 |
| Matt Square | Surveyor | JBN0070 | 10-01-2026 | 15:15:00 | 15:45:00 |
| Matt man | Surveyor | JBN0072 | 10-01-2026 | 20:00:00 | 20:55:00 |
| Matt murugan | Surveyor | JBN0074 | 10-01-2026 | 20:00:00 | 20:30:00 |
| Matt Triangle | Surveyor | JBN0076 | 10-01-2026 | 20:00:00 | 20:40:00 |
| Matt vel | Surveyor | JBN0076 | 10-01-2026 | 20:00:00 | 20:45:00 |

Close

Total records :00

Search results are grouped by module, making it easier for the user to understand where the matching data exists.

In the screenshot, two modules returned results:

A. Contacts (20 Records)

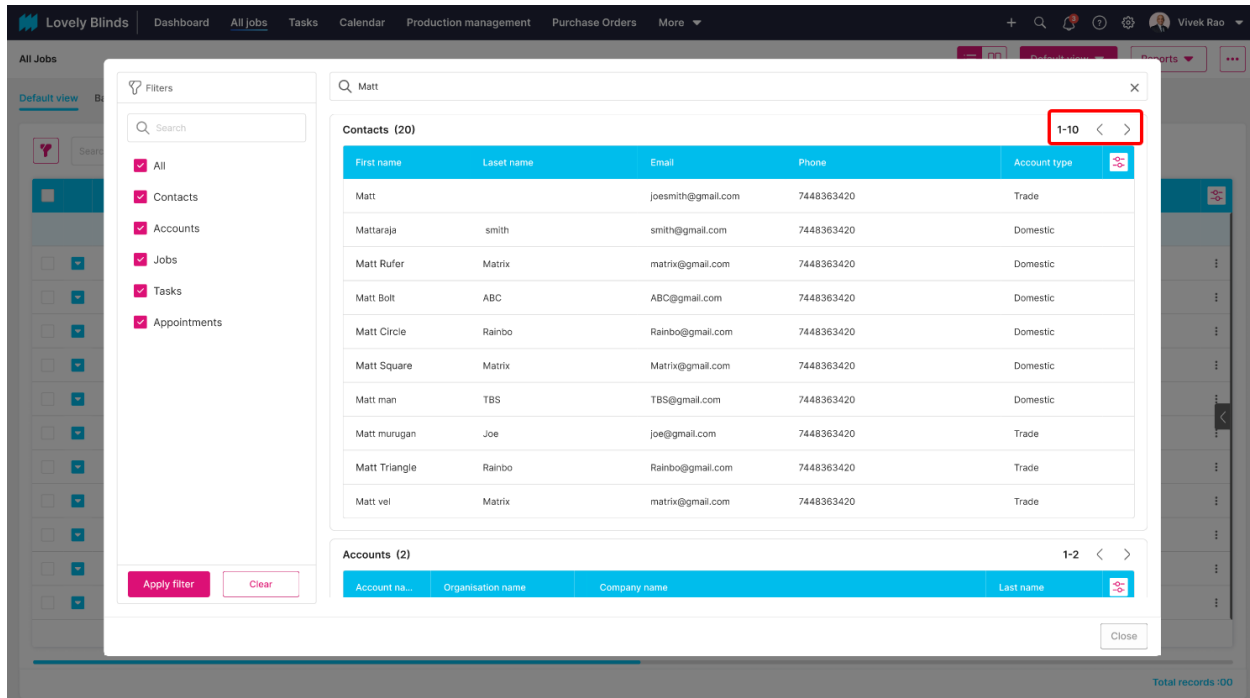
- Shows all contact records where the keyword “Matt” matches:
 - First name
 - Last name
 - Phone number
 - Company name
- A table format displays key fields such as:
 - First name
 - Last name
 - Phone
 - Role
 - Company name

Pagination Controls

Located on the right side of each module block:

- Shows the number of results (e.g., **1–10**)
- Arrows allow the user to navigate between pages if there are more results
- Each module has its own independent pagination

This ensures large result sets load efficiently.



The screenshot shows the 'All Jobs' section of the BlindMatrix CRM. A search modal is open for the name 'Matt'. On the left, there are filter checkboxes for 'All', 'Contacts', 'Accounts', 'Jobs', 'Tasks', and 'Appointments'. The main area displays two tables: 'Contacts (20)' and 'Accounts (2)'. The 'Contacts' table has columns: First name, Last name, Email, Phone, and Account type. The 'Accounts' table has columns: Account name, Organisation name, Company name, and Last name. Both tables have a pagination control (1-10) and a filter/settings icon in the top right corner of the table header.

| First name | Last name | Email | Phone | Account type |
|---------------|-----------|--------------------|------------|--------------|
| Matt | | joesmith@gmail.com | 7448363420 | Trade |
| Mattaraja | smith | smith@gmail.com | 7448363420 | Domestic |
| Matt Rufer | Matrix | matrix@gmail.com | 7448363420 | Domestic |
| Matt Bolt | ABC | ABC@gmail.com | 7448363420 | Domestic |
| Matt Circle | Rainbo | Rainbo@gmail.com | 7448363420 | Domestic |
| Matt Square | Matrix | Matrix@gmail.com | 7448363420 | Domestic |
| Matt man | TBS | TBS@gmail.com | 7448363420 | Domestic |
| Matt murugan | Joe | joe@gmail.com | 7448363420 | Trade |
| Matt Triangle | Rainbo | Rainbo@gmail.com | 7448363420 | Trade |
| Matt vel | Matrix | matrix@gmail.com | 7448363420 | Trade |

| Account na... | Organisation name | Company name | Last name |
|---------------|-------------------|--------------|-----------|
|---------------|-------------------|--------------|-----------|

Module-Specific Column customization

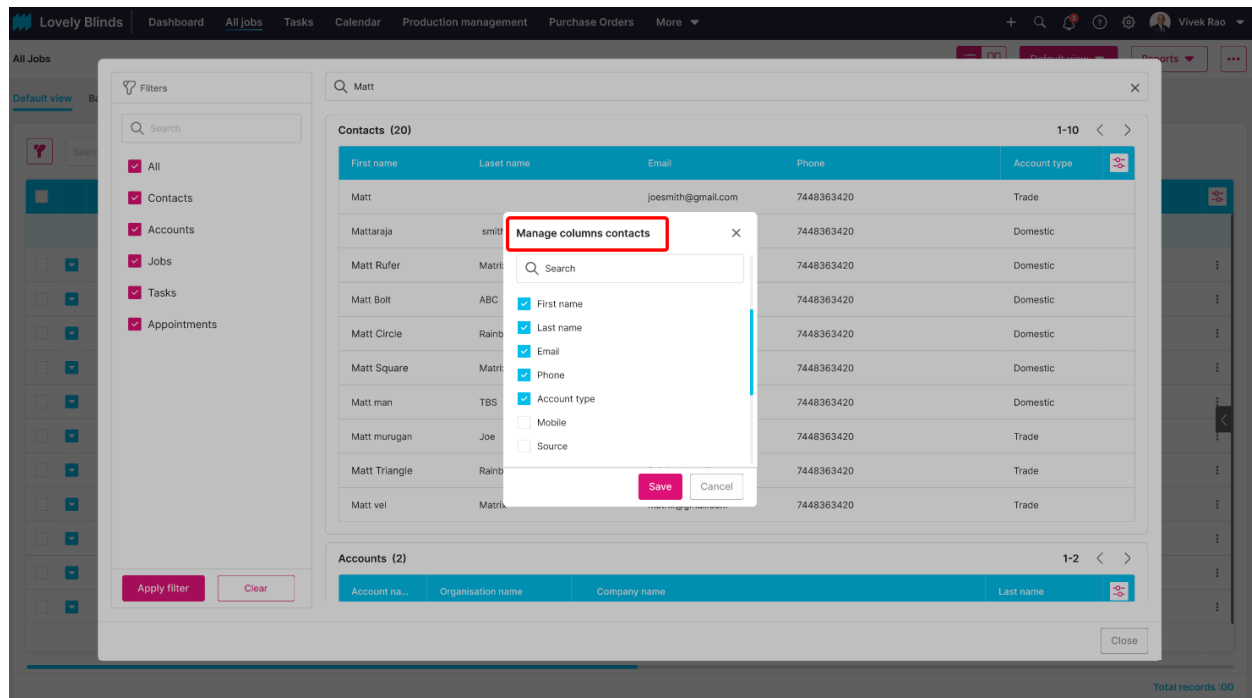
Each module table has a small **filter/settings icon**.

Clicking this icon allows users to:

- Customize visible columns
- Sort results
- Apply module-specific filters

A minimum of **3 columns** must always remain selected. Users should not be allowed to unselect columns once the selected count reaches **3**. A maximum of **10 columns** can be selected.

This makes the search more precise and tailored to the user's workflow.



Manage columns contacts

Search

- ☒ First name
- ☒ Last name
- ☒ Email
- ☒ Phone
- ☒ Account type
- ☐ Mobile
- ☐ Source

Save Cancel

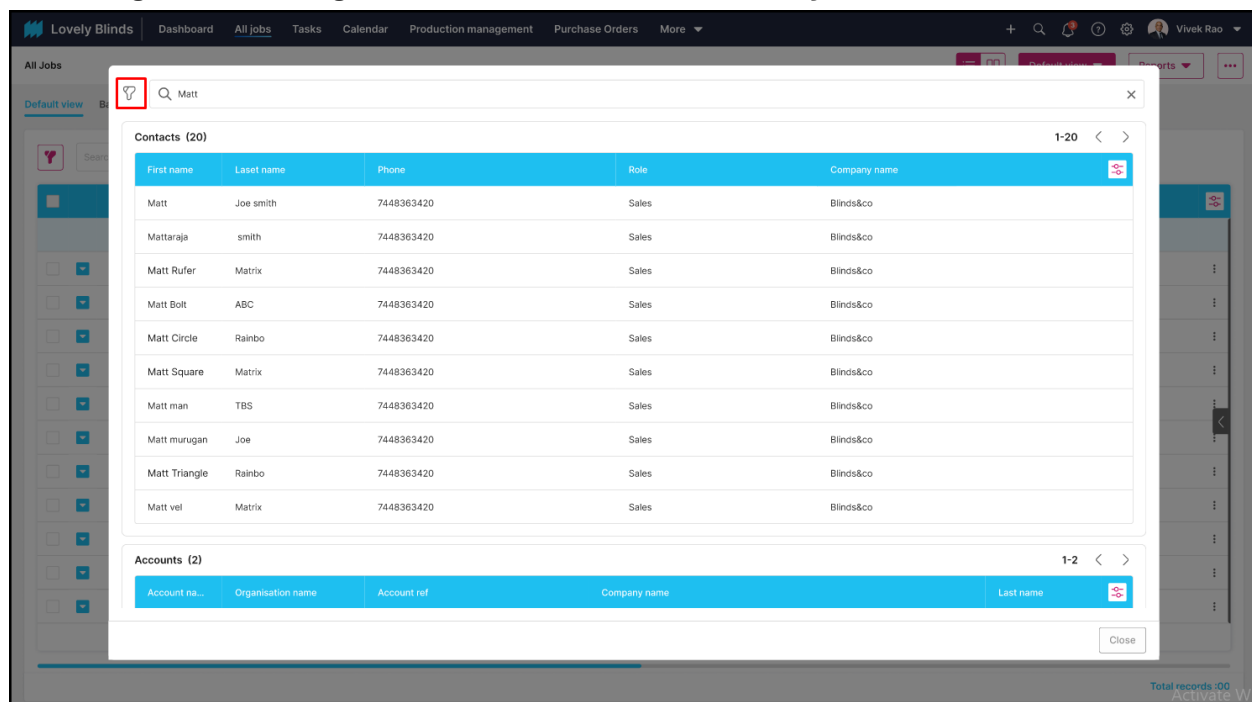
| First name | Last name | Email | Phone | Account type |
|---------------|-----------|--------------------|------------|--------------|
| Matt | Joe smith | joesmith@gmail.com | 7448363420 | Trade |
| Mattaraja | smith | | 7448363420 | Domestic |
| Matt Rufer | Matrix | | 7448363420 | Domestic |
| Matt Bolt | ABC | | 7448363420 | Domestic |
| Matt Circle | Rainbo | | 7448363420 | Domestic |
| Matt Square | Matrix | | 7448363420 | Domestic |
| Matt man | TBS | | 7448363420 | Domestic |
| Matt murugan | Joe | | 7448363420 | Trade |
| Matt Triangle | Rainbo | | 7448363420 | Trade |
| Matt vel | Matrix | | 7448363420 | Trade |

| Account na... | Organisation name | Company name | Last name |
|---------------|-------------------|--------------|-----------|
| | | | |

Module Filter Options

Each checkbox represents a module.

Checking or unchecking these boxes decides **where the system should search**.



Manage columns contacts

Search

- ☒ First name
- ☒ Last name
- ☒ Email
- ☒ Phone
- ☒ Account type
- ☐ Mobile
- ☐ Source

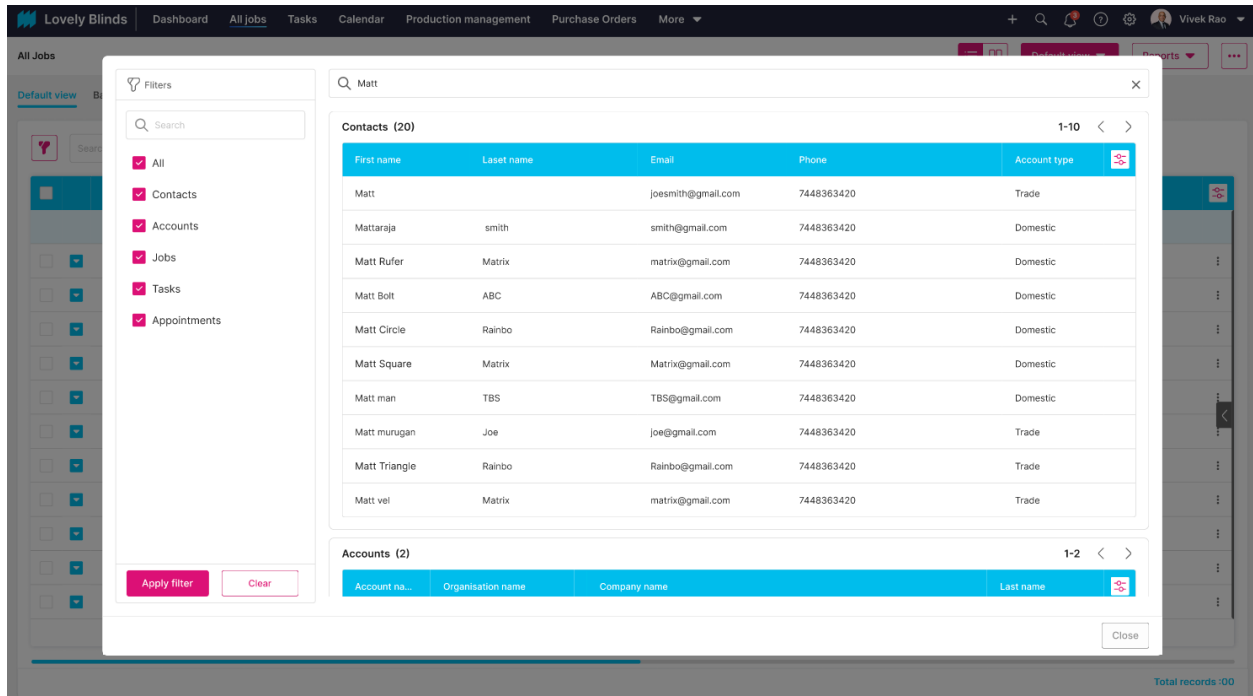
Save Cancel

| First name | Last name | Phone | Role | Company name |
|---------------|-----------|------------|-------|--------------|
| Matt | Joe smith | 7448363420 | Sales | Blinds&co |
| Mattaraja | smith | 7448363420 | Sales | Blinds&co |
| Matt Rufer | Matrix | 7448363420 | Sales | Blinds&co |
| Matt Bolt | ABC | 7448363420 | Sales | Blinds&co |
| Matt Circle | Rainbo | 7448363420 | Sales | Blinds&co |
| Matt Square | Matrix | 7448363420 | Sales | Blinds&co |
| Matt man | TBS | 7448363420 | Sales | Blinds&co |
| Matt murugan | Joe | 7448363420 | Sales | Blinds&co |
| Matt Triangle | Rainbo | 7448363420 | Sales | Blinds&co |
| Matt vel | Matrix | 7448363420 | Sales | Blinds&co |

| Account na... | Organisation name | Account ref | Company name | Last name |
|---------------|-------------------|-------------|--------------|-----------|
| | | | | |

Available Filters (as shown):

- **All** – Selects or deselects all modules at once.
- **Contacts** – Searches customer or supplier contact records.
- **Accounts** – Searches account or organization-level records.
- **All jobs** – Searches job numbers, job names, job details.
- **Task** – Searches tasks assigned or created.
- **Appointments** – Searches scheduled appointments or site visits.



Apply Filter

- Executes the search **only in the selected modules**.

Clear

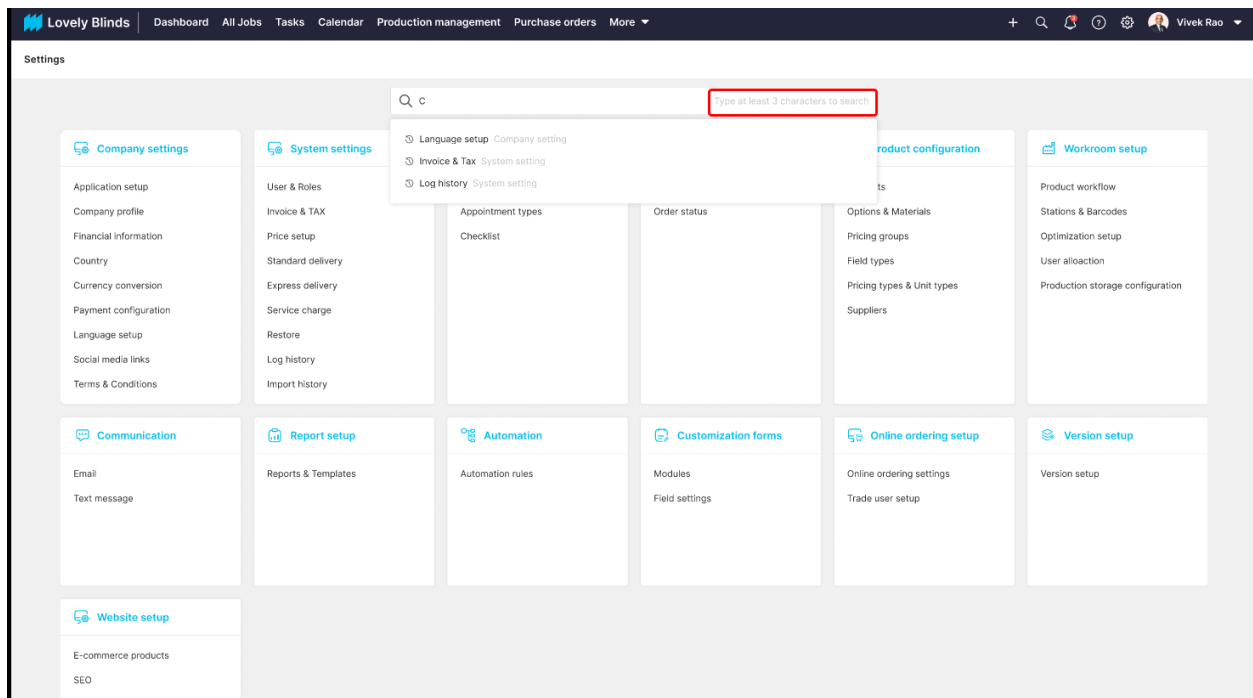
- Resets all filters to their default state (usually selects all).

Global Search within Setting module:

- The search overlay can be opened by:

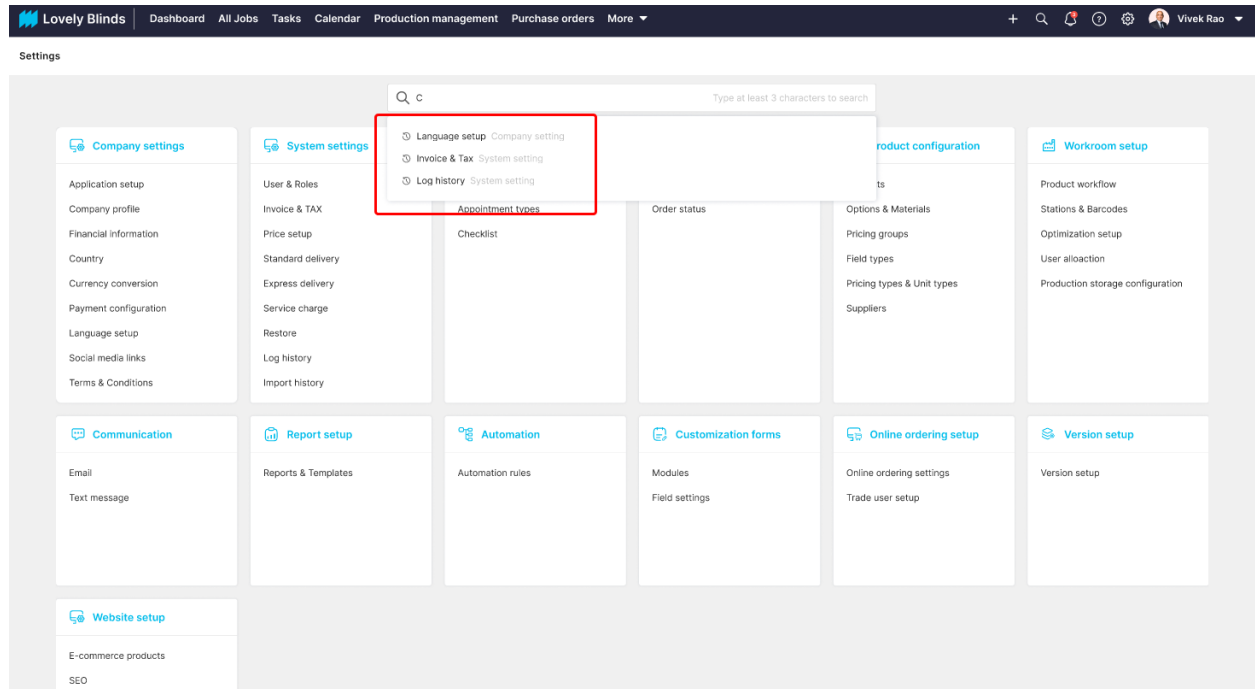
- Clicking the search icon,
- When opened, the input shows a placeholder: **“Type at least 3 characters to search...”**.

Typing fewer than 3 characters shows the **Recent Searches** list (if any) and the placeholder hint.

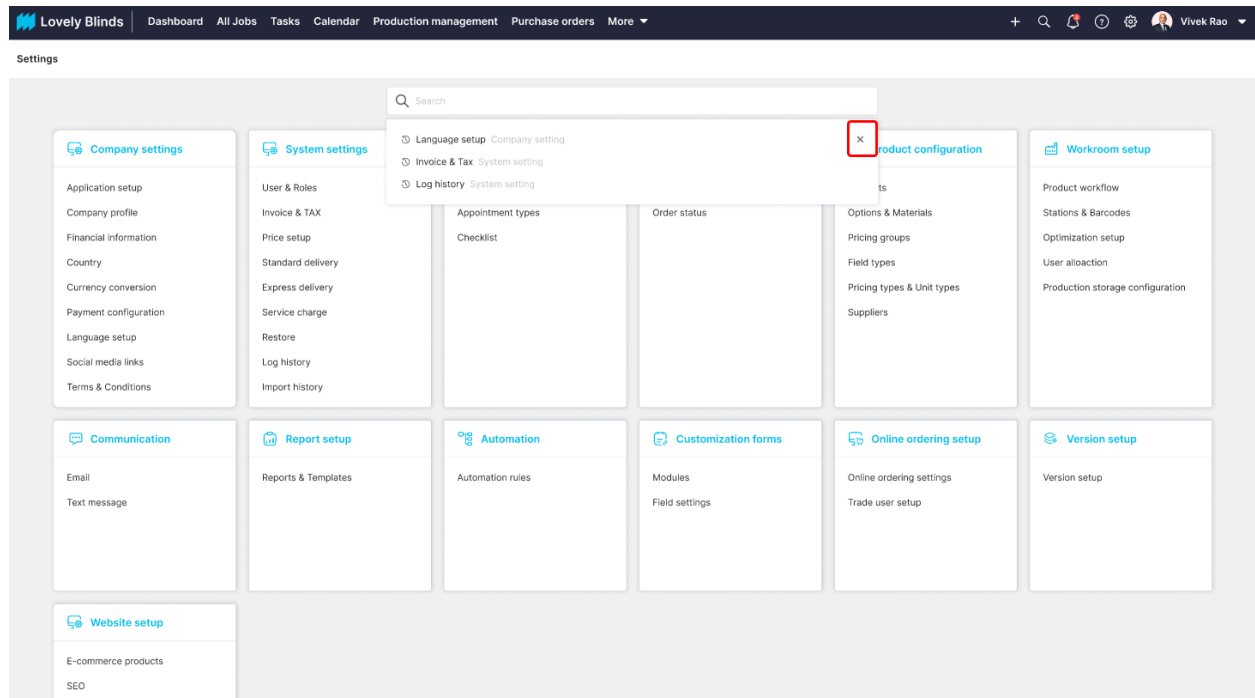


3. Recent Search History

- The overlay initially displays a **recent searches** section ordered by most recent.
- Recent searches persist per user (store in DB or local Storage)



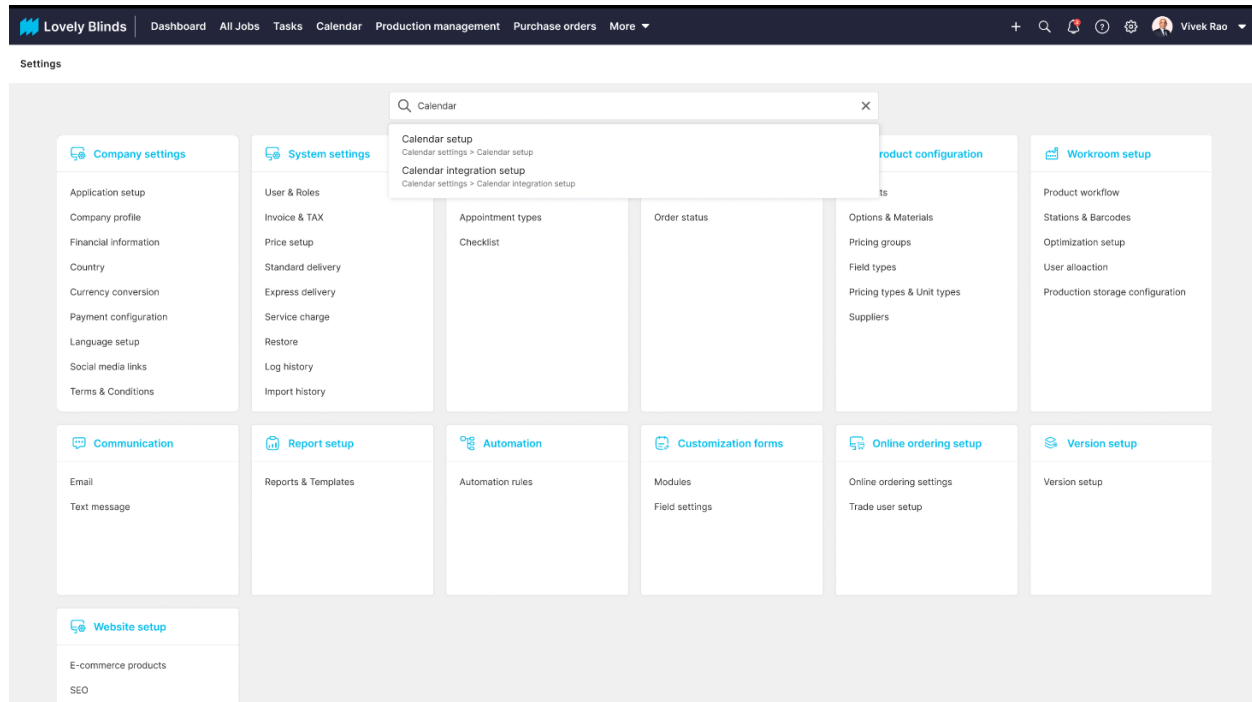
Clicking on the cross icon will remove the searched results



4. Live Results

- After 3 characters, search results appear in real-time (typeahead).
- Results show:

- **Module/Item name** (primary)
- **Module path** (secondary), e.g. Settings → Calendar setup.
- Results are ranked by relevance: exact match → starts-with → contains → frequency/popularity.



5. Result Interaction

- Clicking a result navigates the user to the exact module or page (same behavior as clicking the module in the UI).
- Keyboard navigation supported: Up/Down arrows to highlight, enter to open, Esc to close.

Permission-Based Search Visibility

- Users must see only the modules and records they have permission to access.
- If a user does not have access to *Accounts*, *Jobs*, *Contacts*, etc., those categories should not appear in results.
- No restricted data should appear in:
 - search suggestions
 - search history
 - advanced search filters

No Results Handling

If no result is found:

- Show **“No results found”** message in setting module and global search

Settings

tyhytkjggvg

No results found

Company settings

Application setup
Company profile
Financial information
Country
Currency conversion
Payment configuration
Language setup
Social media links
Terms & Conditions

System settings

User & Roles
Invoice & TAX
Price setup
Standard delivery
Express delivery
Service charge
Restore
Log history
Import history

Product configuration

ts
s & Materials
groups
pes
types & Unit types
Suppliers

Workroom setup

Product workflow
Stations & Barcodes
Optimization setup
User allocation
Production storage configuration

Communication

Email
Text message

Report setup

Reports & Templates

Automation

Automation rules

Customization forms

Modules
Field settings

Online ordering setup

Online ordering settings
Trade user setup

Version setup

Version setup

Website setup

E-commerce products
SEO

All Jobs

Default view



Filters

Search

- ☐ All
- ☐ Contacts
- ☐ Accounts
- ☒ All jobs
- ☒ Task
- ☒ Appointments

Apply filter

Clear

Matt

No record found

Close

