

Global search

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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.

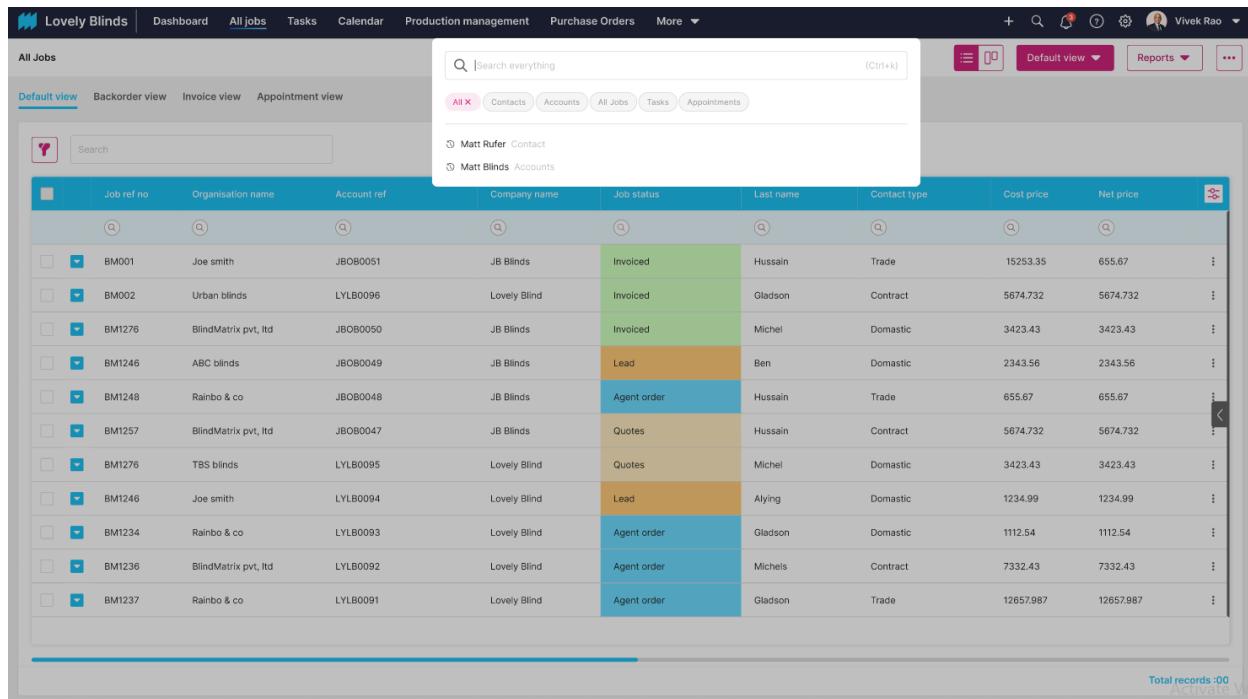
Multi language should support the search functionality.

Functional Requirements

Global Search

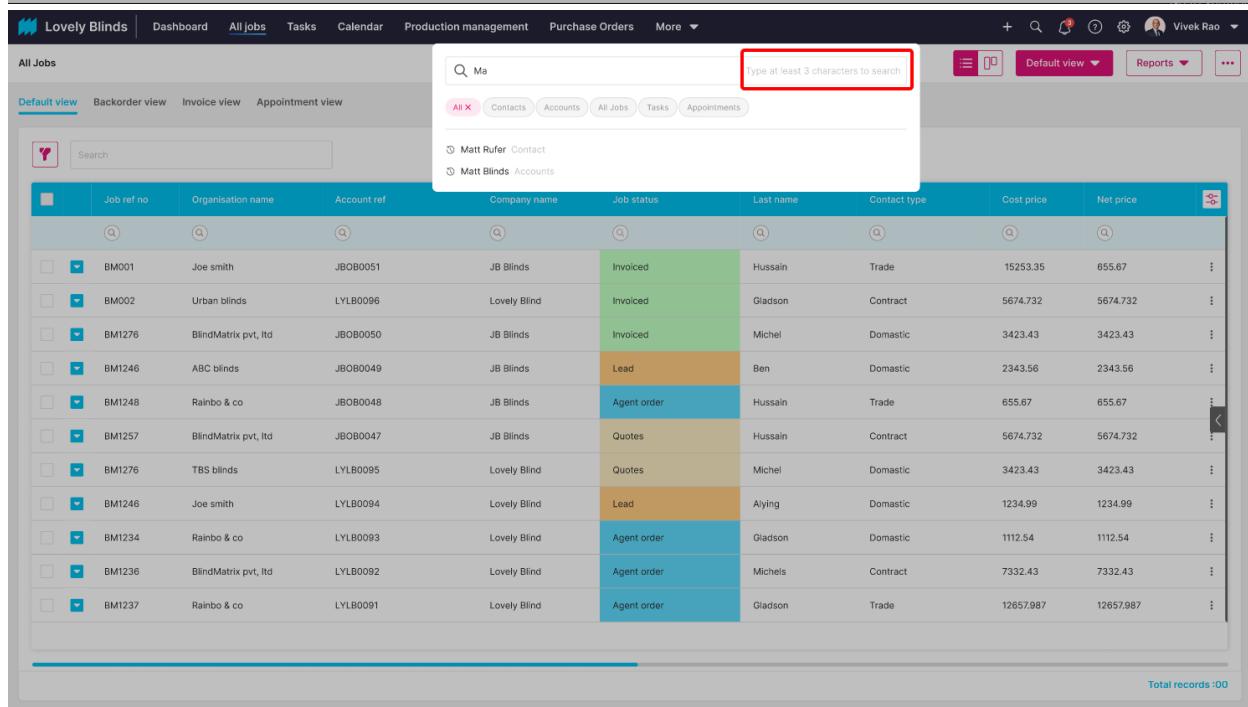
Search Input

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).



Search results for 'Matt' in the 'All Jobs' view:

- Contacts:**
 - Matt Rufer Contact
 - Matt Blinds Accounts
- Accounts:**
 - JB Blinds (Invoiced, Job ref no: BM001)
 - Lovely Blinds (Invoiced, Job ref no: BM002)
 - JB Blinds (Invoiced, Job ref no: BM1276)
 - JB Blinds (Lead, Job ref no: BM1246)
 - JB Blinds (Agent order, Job ref no: BM1248)
 - JB Blinds (Quotes, Job ref no: BM1257)
 - Lovely Blinds (Quotes, Job ref no: BM1276)
 - Lovely Blinds (Lead, Job ref no: BM1246)
 - Rainbo & co (Agent order, Job ref no: BM1234)
 - BlindMatrix pvt, Itd (Agent order, Job ref no: BM1236)
 - Rainbo & co (Agent order, Job ref no: BM1237)



Search results for 'Ma' in the 'All Jobs' view:

Type at least 3 characters to search

Search input field: Ma

Search results are empty.

Search Results Display

1. The system must display results grouped under categories:
 - a. Contacts
 - b. Accounts
 - c. All Jobs

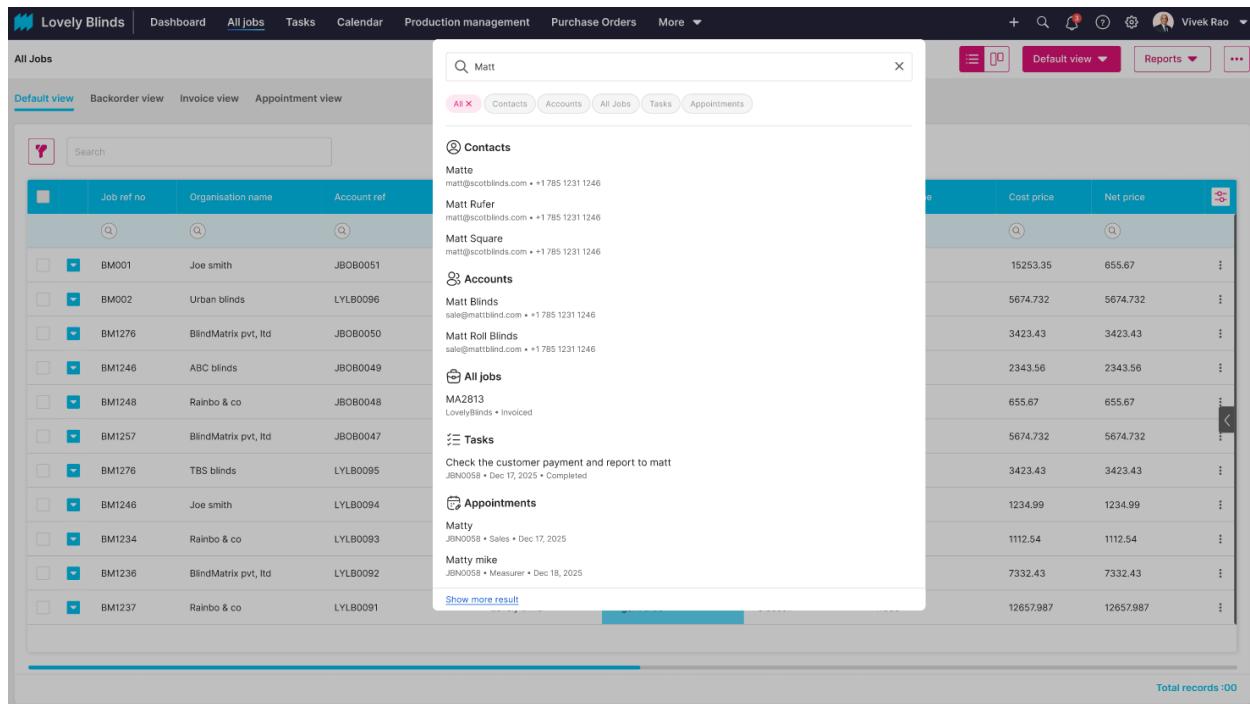
- d. Tasks
- e. Appointments

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

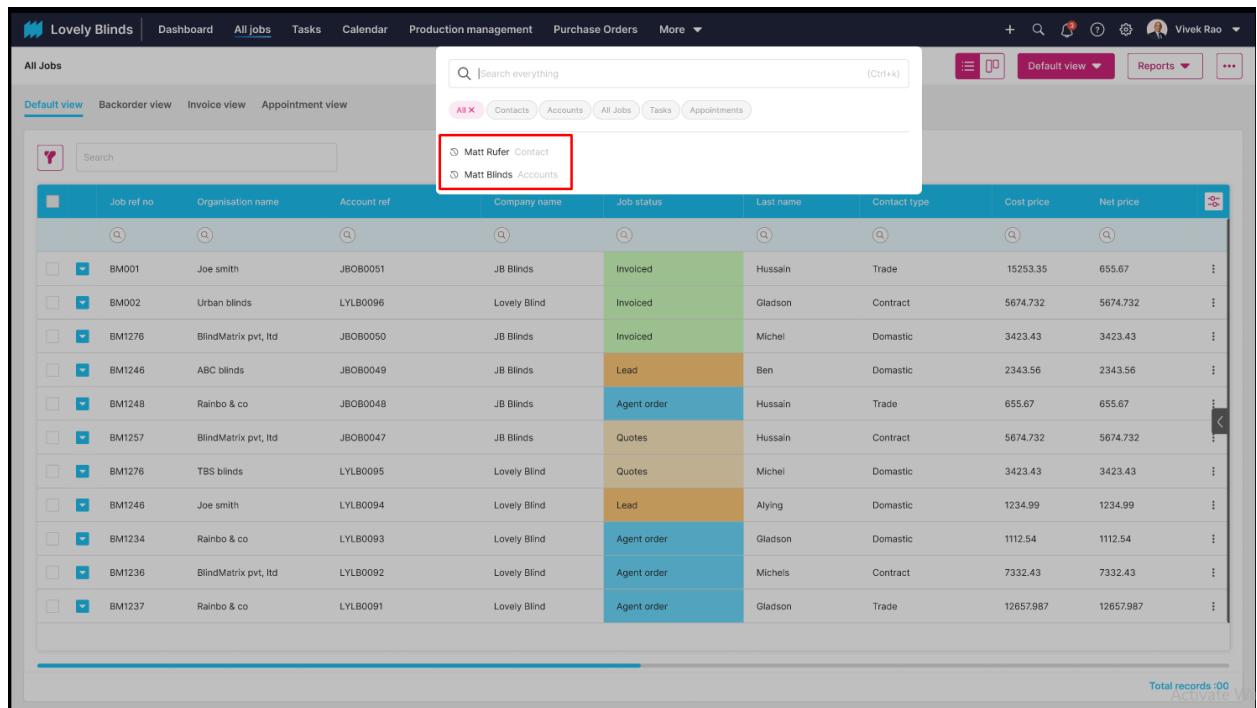


The screenshot shows the BlindMatrix software interface. At the top, there is a navigation bar with links: Lovely Blinds, Dashboard, All jobs, Tasks, Calendar, Production management, Purchase Orders, More, and a user dropdown for Vivek Rao. Below the navigation bar is a search bar with the text 'Matt'. To the right of the search bar are buttons for 'Default view' (highlighted in pink), 'Reports', and a three-dot menu. The main content area is divided into several sections: 'All Jobs' (Default view selected), 'Contacts' (listing 'Matt', 'Matt Rufer', and 'Matt Square'), 'Accounts' (listing 'Matt Blinds' and 'Matt Roll Blinds'), 'All jobs' (listing 'MA2813'), 'Tasks' (listing 'Check the customer payment and report to matt'), 'Appointments' (listing 'Matty' and 'Matty mike'), and a 'Show more result' button. On the right side, there is a table with columns 'Cost price', 'Net price', and a header row. The table lists several items with their respective values.

	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

Search History

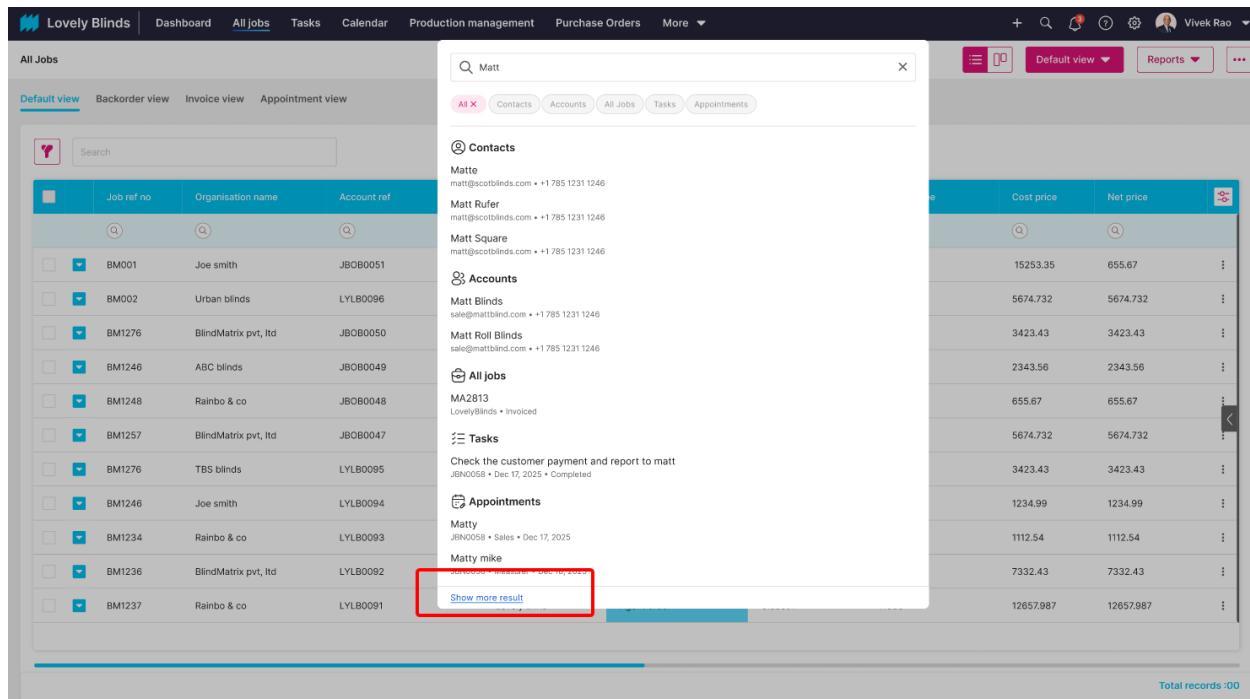
1. The system must maintain a list of the user's recent searches.
2. Search history should appear when the user clicks inside the search bar without typing.
3. Search history items should display:
 - a. Name
 - b. Module type (Contact, Account, etc.)
4. Clicking on a history item should open the corresponding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



The screenshot shows the 'All Jobs' list in the BlindMatrix software. The Global Search panel at the top right contains a search bar and a 'Advanced search' link, which is highlighted with a red box. Below the search panel is a list of 15 job entries with columns for Job ref no, Organisation name, Account ref, Company name, Job status, Last name, Contact type, Cost price, and Net price. The 'Job status' column uses color-coding: green for Invoiced, orange for Lead, blue for Agent order, and yellow for Quotes. The 'Last name' column shows names like Hussain, Gladson, Michel, Ben, and Alying. The 'Contact type' column shows Trade, Contract, Domestic, and Agent. The 'Cost price' and 'Net price' columns show numerical values. At the bottom right of the list, it says 'Total records: 00' and 'Activate W'.

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 shows the Advanced Search screen in BlindMatrix. A search bar at the top contains the keyword "Matt". Below the search bar, there are tabs for "Default view", "Backorder view", "Invoice view", and "Appointment view". The "Default view" tab is selected. The search results are displayed in a grid format, grouped by module:

- 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, Sales, Dec 17, 2025)

A red box highlights the "Show more result" button at the bottom of the search results grid. The total number of records is 00.

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 | + | Search | Notifications | Settings | Vivek Rao | Reports | ...

All Jobs

Default view

Search

Contacts (20)

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)

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

Total records :00

Lovely Blinds | Dashboard | All jobs | Tasks | Calendar | Production management | Purchase Orders | More | + | Search | Notifications | Settings | Vivek Rao | Reports | ...

All Jobs

Default view

Search

Accounts (20)

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)

Job ref No	Company name	Job status	Account type	Organisation name

Total records :00

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

+

Vivek Rao

All Jobs

Default view

Search

Jobs (20)

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
JBN0078	Blinds&co	Order	Trade	Blindmatrix

Tasks (20)

Task Date	Subject	Job ref No	Mark as completed	Staff

Total records :00

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

+

Vivek Rao

All Jobs

Default view

Search

Appointments (20)

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	JBN0078	10-01-2026	20:00:00	20:45:00

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)

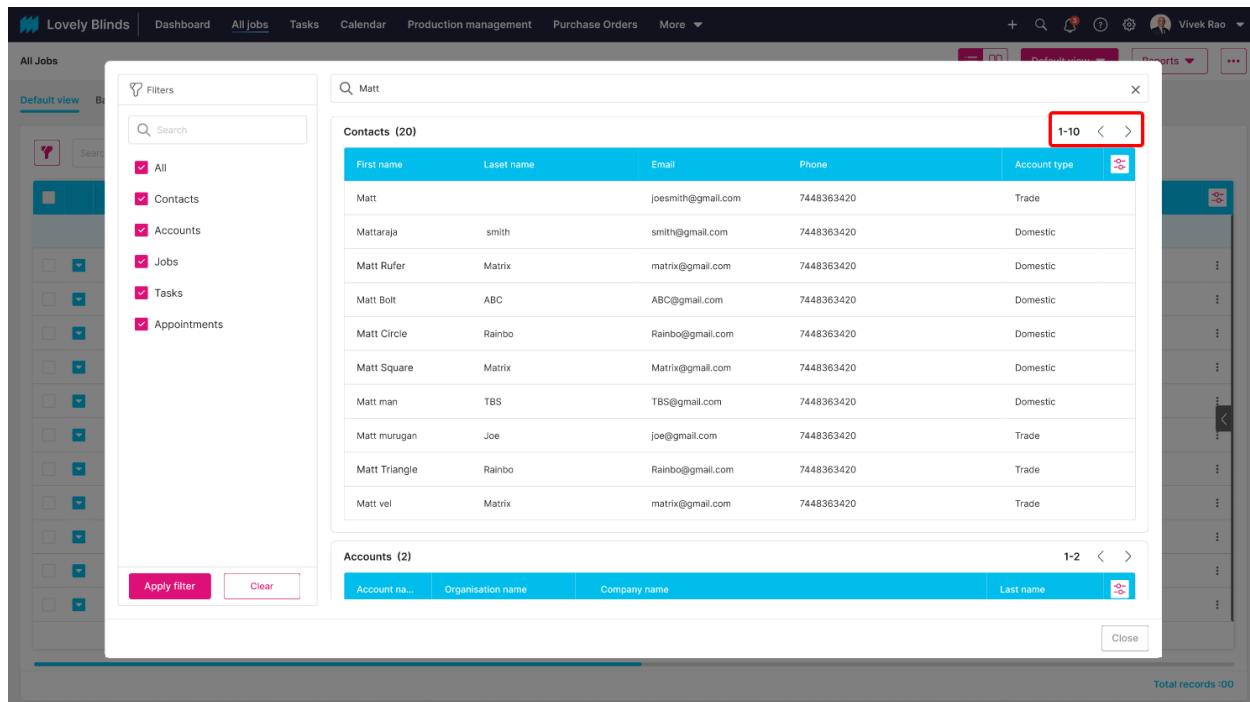
- Shows all contact records where the keyword “Matt” matches:
 - First name
 - Last name
 - Phone number
 - Company name
- A table format displays key fields such as:
 - First name
 - Last name
 - Phone
 - Role
 - Company name

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.



Search results for 'Matt':

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 no.	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.



The screenshot shows the Lovely Blinds software interface with a modal window titled "Manage columns contacts" overlaid on a list of contacts. The modal contains a search bar and a list of checkboxes for selecting columns: First name, Last name, Email, Phone, Account type, Mobile, and Source. The "First name" and "Last name" checkboxes are checked. The "Manage columns contacts" modal is highlighted with a red box.

Dashboard **All jobs** **Tasks** **Calendar** **Production management** **Purchase Orders** **More** **Logout** **Vivek Rao**

All Jobs

Default view **Batch** **Search**

Filters **Search** **Matt**

Contacts (20) **1-10** **...**

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

Accounts (2) **1-2** **...**

Account na...	Organisation name	Company name	Last name

Apply filter **Clear** **Close**

Total records :00

Module Filter Options

Each checkbox represents a module.

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

The screenshot shows the Lovely Blinds software interface with a search modal open. The search bar at the top contains the text "Matt". A red box highlights the magnifying glass icon in the search bar. The modal is divided into two sections: "Contacts (20)" and "Accounts (2)".

Contacts (20)

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 Bol	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

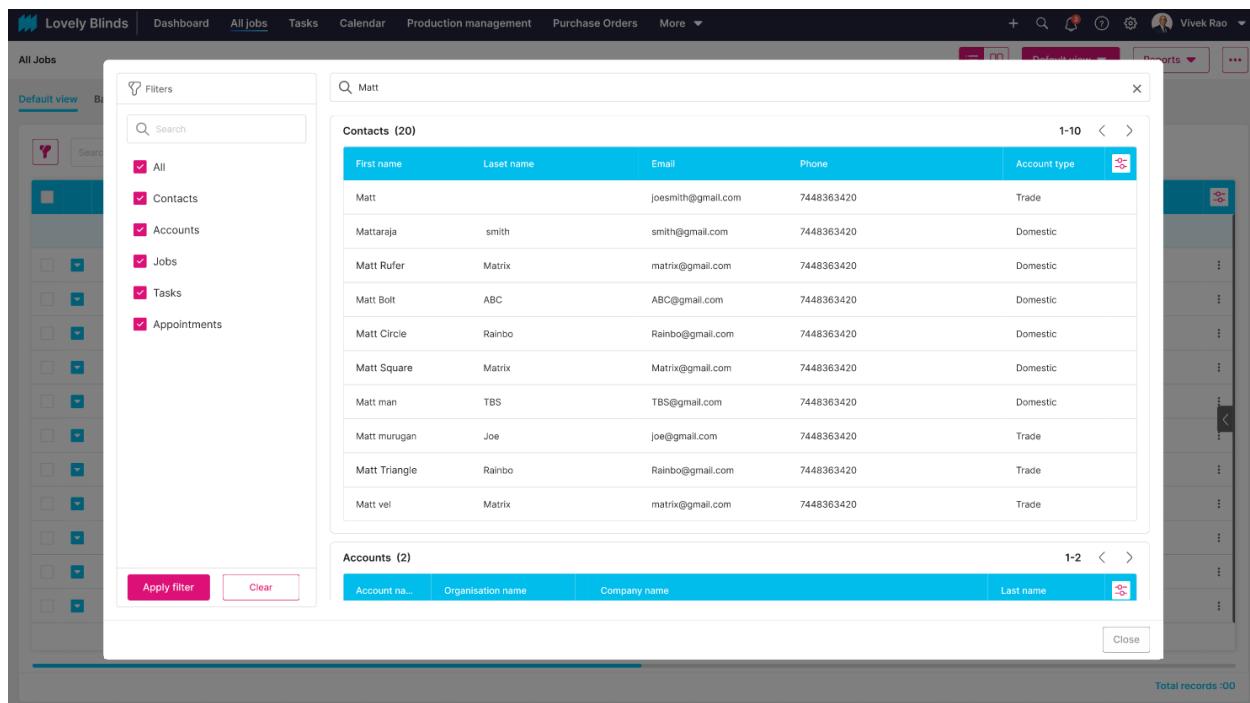
Accounts (2)

Account no...	Organisation name	Account ref	Company name	Last name
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Total records: 0 | Activate W...

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.



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

Apply Filter

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

Clear

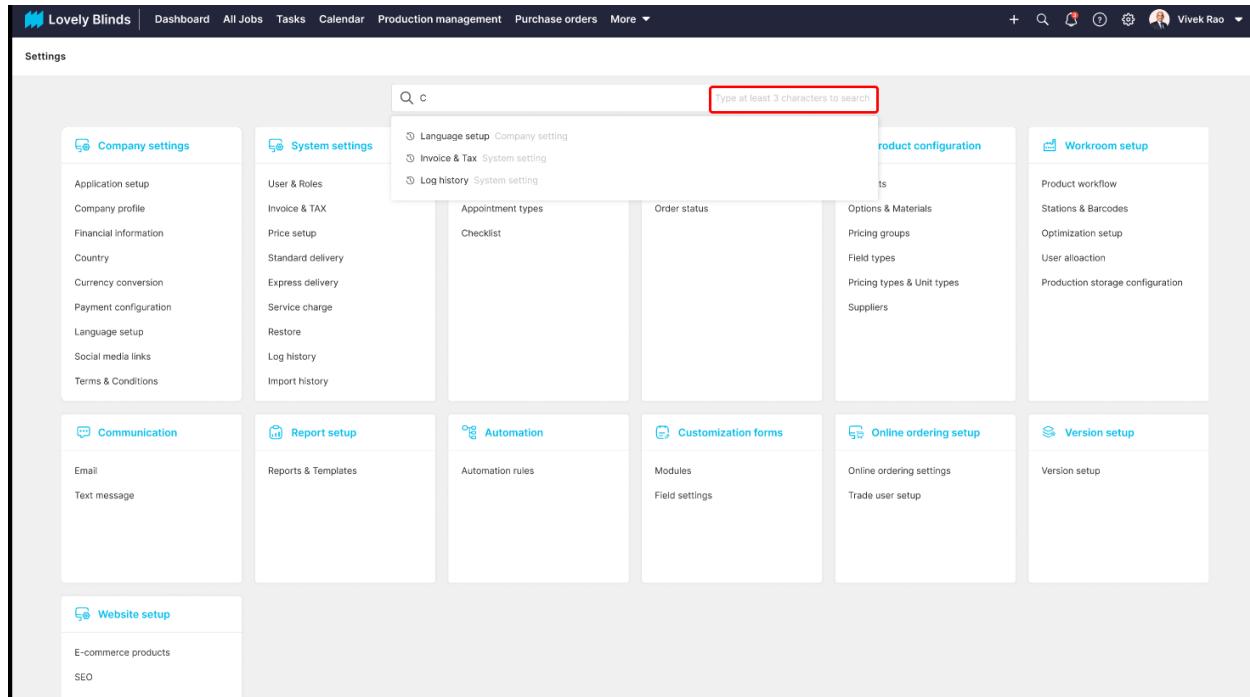
- Resets all filters to their default state (usually selects all).

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.

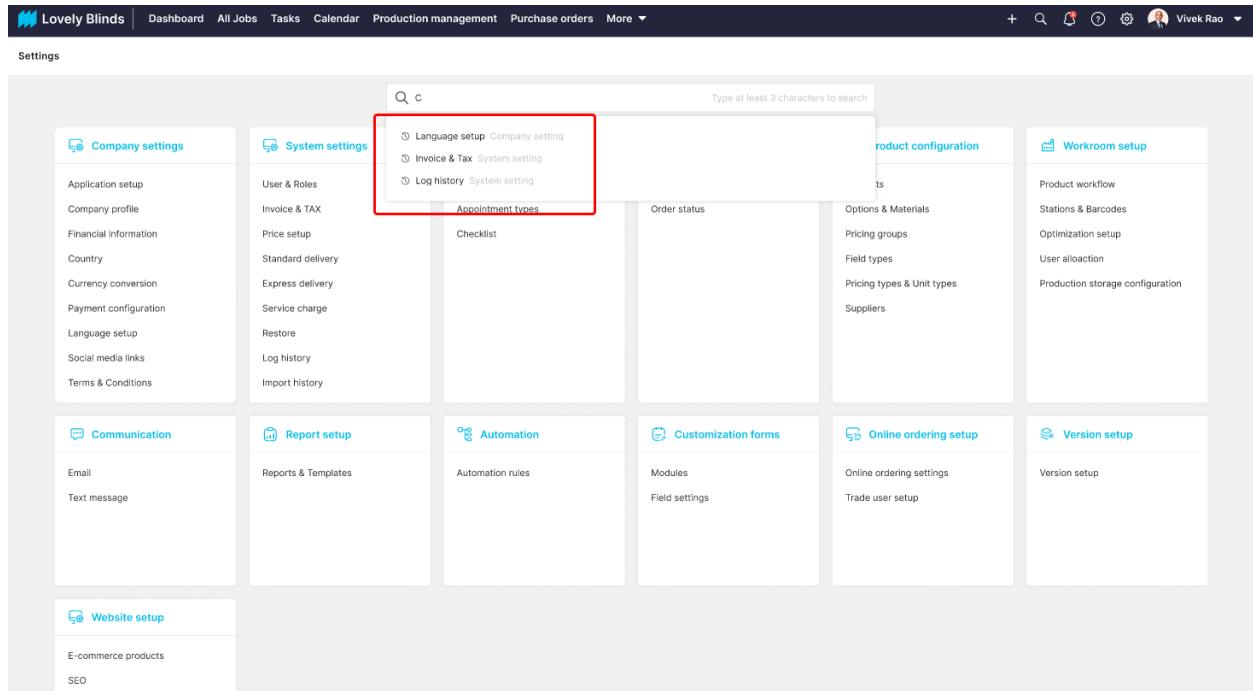


The screenshot shows the 'Settings' page of the BlindMatrix application. At the top, there is a navigation bar with links: Lovely Blinds, Dashboard, All Jobs, Tasks, Calendar, Production management, Purchase orders, More, and a user profile for Vivek Rao. Below the navigation bar is a search bar with a placeholder 'Type at least 3 characters to search...'. The main content area is a grid of settings categories. The categories and their sub-links are as follows:

- 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**: Options & Materials, Pricing groups, Field types, Pricing types & Unit types, Suppliers.
- Workroom setup**: Product workflow, Stations & Barcodes, Optimization setup, User location, 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**.
- Website setup**: E-commerce products, SEO.

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)



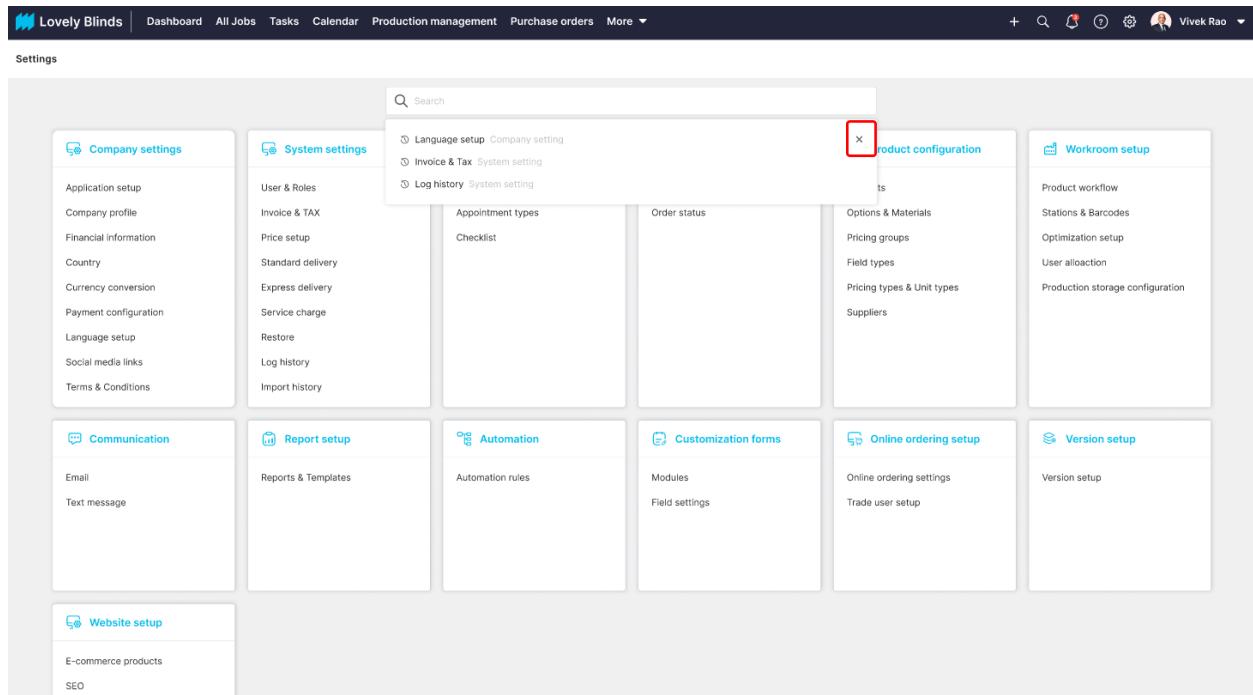
Settings

Search: c

Type at least 3 characters to search

Company settings	System settings	Product configuration	Workroom setup
Application setup Company profile Financial information Country Currency conversion Payment configuration Language setup Social media links Terms & Conditions	User & Roles Invoice & TAX Price setup Standard delivery Express delivery Service charge Restore Log history Import history	Appointment types Checklist Order status Module Field settings	Options & Materials Pricing groups Field types Pricing types & Unit types Suppliers
Communication	Report setup	Automation	Customization forms
Email Text message	Reports & Templates	Automation rules	Modules Field settings
Website setup			Online ordering setup Online ordering settings Trade user setup
E-commerce products SEO			Version setup

Clicking on the cross icon will remove the searched results



Settings

Search: c

Product configuration

Workroom setup

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

Online ordering setup

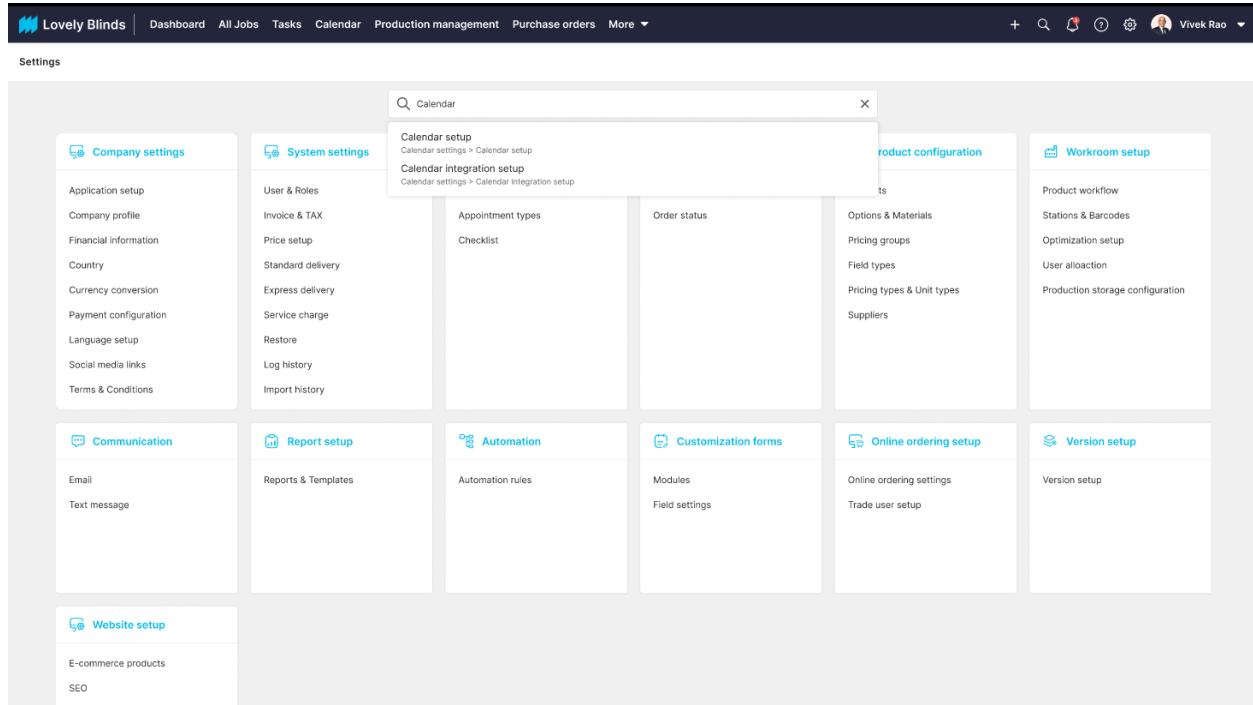
Version setup

Version setup

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



 **Lovely Blinds** | [Dashboard](#) [All Jobs](#) [Tasks](#) [Calendar](#) [Production management](#) [Purchase orders](#) [More](#) [+](#)      **Vivek Rao** [Logout](#)

Global navigation					
Company settings		System settings		Product configuration	
Communication		Report setup		Automation	
Application setup	Company profile	User & Roles	Invoice & TAX	Product types	Product configuration
Financial information	Country	Price setup	Standard delivery	Materials & Components	Product variants
Currency conversion	Payment configuration	Express delivery	Service charge	Groups	Product families
Language setup	Terms & Conditions	Restore	Log history	Suppliers	User allocation
Social media links		Import history			Production storage configuration
Terms & Conditions					
Website setup		E-commerce products		SEO	

The screenshot shows the Lovely Blinds software interface. At the top, there is a navigation bar with links: Dashboard, All jobs, Tasks, Calendar, Production management, Purchase Orders, and More. On the far right, there are user profile icons for Vivek Rao and other users, along with a settings gear icon. Below the navigation bar, the main content area has a title 'All Jobs' and a 'Default view' button. A sidebar on the left contains a 'Filters' section with a search bar and a list of filter options: All, Contacts, Accounts, All jobs (which is checked), Task, and Appointments. Below this is a list of job items, each with a small thumbnail, a title, and a 'More' button. A search bar at the top right contains the text 'Matt'. The main search results area displays the message 'No record found'. At the bottom of the search results, there are 'Apply filter' and 'Clear' buttons. A 'Close' button is located in the bottom right corner of the search modal. The bottom right corner of the screen also shows a 'Total records :00' message and a 'Activate Windows' button.

