

# IT-Solutions4You

# 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 .

A Preinvoice Calendar Leads Or;	ganizations Contact	s Opportun	ities Products Documents Tickets All -						1 O 🗘	demo610-14221 -
💿vtiger	All Records	• Type key	word and press enter Q Advanced					1	CRM Settings	+
• Studio	V	==	Dashboard	<b>V</b>		5	Opportunities		Manage Users	
Edit Fields	V	4	Contacts	V		<u>10</u>	Organizations			
Picklist Editor	V		Leads	V		62 <b>8</b>	Documents			
Menu Editor 2.	V	38	Calendar				Emails			
Module Manager	V	Q	Tickets	1			Products			
<ul> <li>Templates</li> </ul>	V	2	FAQ				Vendors			
<ul> <li>Other Settings</li> </ul>	V	æ	Price Books	V		R	Quotes			
<ul> <li>Integration</li> </ul>	V	Po	Purchase Order	V		80	Sales Order			
Extension Store	V	<b>B</b>	Invoice			2	RSS			
	v 0	*	ExtensionStore	V	۵		PDFMaker			
	v 0	*	Preinvoice							
3	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.

mport Module	e from Zip	
	Direlaiman Curtam Eilar zould aut war CDU at rick	
	Discumine - Custom rules Could put your CMa at risk new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules c vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vtiger.	ould include security
2.	I accept with disclaimer and would like to proceed	
1.[	Choose File	3. Import Cancel

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.

Verify Import Details	
Viger Version : License	
* Modele : * Version : * Version : * Version : * Author : Th-Soldions4You s r o - www.its4you.sk * Supported Wowsens : Internet Explorer 7 or higher Mozilla Frefox 3.0 or higher	Î
🖕 🕼 accept the license agreement.	2. Import Now Cancel

Picture 1.3: Installation of Quick Search – Step 3

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

Import Successfull	×
module was imported successfully.	
	Ok

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.** 

Control Participant P	A Calendar Leads Organizations Con	tacts Opportunities Products Docum	nents Tickets All -	€ <u>&gt;</u>	iio 🖌 🖉 🔅	ł vtiger650 -
Settings         Disclementation         Disclementation <thdisclementation< th="">         Disclementation         <thdisclementation< th="">         Disclementation<th>🕲 vtiger</th><th>Quick Search • Type keyword</th><th>d and press enter Q Advanced</th><th>1</th><th>CRM Settings</th><th>+</th></thdisclementation<></thdisclementation<>	🕲 vtiger	Quick Search • Type keyword	d and press enter Q Advanced	1	CRM Settings	+
IndextendedMadeMedia Markan condered in Quik Sach.AlterAlterI StadieMatherMather and an andMarkanMarkanMarkanI hendedMarkanMather and an andMarkanMarkanMarkanI hendedMarkanMarkan andMarkanMarkanMarkanMarkan serMarkan andMarkan andMarkanMarkanMarkanMarkan serMarkan and <th>Settings</th> <th>Quick Search 4 You</th> <th></th> <th></th> <th>Manage Users</th> <th>F -</th>	Settings	Quick Search 4 You			Manage Users	F -
AddsAddsFachaneFach	<ul> <li>User &amp; Access Control</li> </ul>	Module	Fields which are considered in a Quick Search	Statu	us Actions	
Predest     Cadora     Cadora </td <td>► Studio</td> <td>Assets</td> <td>Fields from All filter are used</td> <td>Turn</td> <td>ion Turn off</td> <td>1</td>	► Studio	Assets	Fields from All filter are used	Turn	ion Turn off	1
• Orseiting       Parloging       Parloging <td><ul> <li>Templates</li> </ul></td> <td>Calendar</td> <td>Fields from All filter are used</td> <td>Turn</td> <td>on Turn off</td> <td>1</td>	<ul> <li>Templates</li> </ul>	Calendar	Fields from All filter are used	Turn	on Turn off	1
ContractsCathforIndex national stateIndex national stateIndex national stateAnouncementsConnersisConners	Other Settlers	Campaigns	Fields from All filter are used	Turn	on Turn off	
Congension         Consens         Fals from All flare ausd         Consens         Consens <thconsens< th=""> <thconsens< th="">         Conse</thconsens<></thconsens<>	Announcement	Cashflow	Fields from All filter are used	Turn	on Turn off	1
Inversory:         Corrects         Concerts	Outgoing Server	Comments	Fields from All filter are used	Turn	on Turn off	1
Belley Notes         Belley Notes         Rich Run All flar ar used         Inner           Custome Numberg Tar Colutions         Doumers         Falds forn All flar ar used         Inner         Inner           Nat Converter         FAQ         Falds forn All flar ar used         Inner         Inner           Nat Converter         FAQ         Falds forn All flar ar used         Inner         Inner           Nordfors         Finder         Falds forn All flar ar used         Inner         Inner           Scholder         Finder         Falds forn All flar ar used         Inner         Inner           Scholder         Falds forn All flar ar used         Inner         Inner         Inner           Custome Profil         Falds forn All flar ar used         Inner         Inner         Inner           Custome Profil         Falds forn All flar ar used         Inner         Inner         Inner           Custome Profil         Falds forn All flar ar used         Inner         Inner         Inner           Custome Profil         Falds forn All flar ar used         Inner         Inner         Inner           Custome Profil         Falds forn All flar ar used         Inner         Inner         Inner           Custome Profil         Falds forn All flar ar used	Inventory: Terms and Conditions	Contacts	Fields from All filter are used	Turn	on Turn off	
boomers         poomers         fab from All flar are used         fals           Na Converser         FAQ         Fab from All flar are used         fals	Currencies	Delivery Notes	Fields from All filter are used	Turn	on Turn off	
Nal Converter         FAQ         Relation Altificar used         Interce         Inter	Tax Calculations	Documents	Fields from All filter are used	Turn	on Turn off	
Nondom         Invoke         Falls from Alffor ar used         Falls from Alffor ar used         Falls from Alffor ar used         Falls form         Falls form <t< td=""><td>Mail Converter</td><td>FAQ</td><td>Fields from All filter are used</td><td>Turn</td><td>on Turn off</td><td></td></t<>	Mail Converter	FAQ	Fields from All filter are used	Turn	on Turn off	
Kondgaron Editor         Istoa Cards         Pale from All filtrar a usid         Fund         Fund         Fund           Scheduer         Lads         Pale from All filtrar a usid         Fund         <	Workflows	Invoice	Fields from All filter are used	Turn	on Turn off	
Lada         Fade mail         Fad	Configuration Editor	Issue Cards	Fields from All filter are used	Turn	on Turn off	
Cotome Portal         Opportunities         Fields on Alflarer used         Fields on         Fields on         Field           Acid AniPer         Organizations         Fields on Alflarer used         Fields on	Webforms	Leads	Fields from All filter are used	Turn	on Turn off	
Ports Paul         Organizations         Fields from Altificar used         Fields	Customer Portal	Opportunities	Fields from All filter are used	Turn	on Turn off	
Add Herr         Price Books         Failst ram usaid	Favorite 4 You	Organizations	Fields from All filter are used	Turn	on Turn off	
Quick Search 4You         Products         Finded for an used         Turn of         Finded for an used           Language Extend 4 You         Project Millestones         Finded for an used         Turn of         Finded for an used           Integrate Extends 0 reg         Project Tables         Finded for an used         Finded for an used         Finded for an used           Extension 500re         Project Table         Finded for an used         Finded for an used         Finded for an used           Project Sale         Finded for an used         Finded for an used         Finded for an used         Finded for an used	Quick Reminder 4 You	Price Books	Fields from All filter are used	Turn	on Turn off	
Langung Extension         Project Millestones         Fulds from Alt flar are used         Turn off         Fund           Integration         Project Tasks         Fulds from Alt flar are used         Turn off         Fund	Quick Search 4 You	Products	Fields from All filter are used	Turn	on Turn off	
Integration         Project Tasks         Fallst storn All filter are used         Faller         Fallst storn All filter are used         Faller	Language Editor 4 You	Project Milestones	Fields from All filter are used	Turn	on Turn off	
Extension Slore         Projects         Falls from Alt filter are used         Turn off         Funnel           Purchase Order         Falls from Alt filter are used         Falls	<ul> <li>Integration</li> </ul>	Project Tasks	Fields from All filter are used	Turn	on Turn off	
Purchase Order Facility results from All filter are used Turns on	Extension Store	Projects	Fields from All filter are used	Turn	on Turn off	
		Purchase Order	Fields from All filter are used	Turn	on Turn off	

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

A Calendar Leads Organizations Contacts Opport	unities Products Doc	uments Tickets	All ~			<b>C</b> 2	<b>E</b> 6	1	0	¢ v	tiger650
Quick Sea	rch • Type keyw	ord and press ente	r Q	٩	Advanced						+
My Preferences Viewing user details "vtiger650 Administrato	r				C	Change Password	Edit	Qu	ick Sea	arch S	ettings
▼ User Login & Role											
User Name	admin				Primary Email	pear nucleation	ayes, at				
First Name	vtiger650				Last Name	Administrator					
Admin	Yes				Role	CEO					
Default Lead View	Today				Status	Active					

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 ×	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
	l L	}	L

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.

🗙 Calendar Leads Organizations	Contacts	Opportunities	Products	Documents	Tickets	Invoice	All ~			
©vtiger <sup>.</sup>	Q	uick Search	▼ Тур	e keyword and	press ente	er	ଷ୍	٩	Advanc	ed
Invoice List	•	Actions ~	+ Add In	voice						▼ All In
<ul> <li>Recently Modified</li> </ul>		A	B C	D	E	F	G	н	I	J

Picture 3.1: How to use Quick Search

Searching you can start if you press Enter or click on

Q	uick Search	▼ s	slovakia Q Q Advanced	
<	Actions -	+ Ad	Quick Search results (1)	1
	A	в	Sales Order (1) Created On	
		Sales Or	SO 1 8 days ago	e
				l
		SO 1		
		TestWar		

Picture 3.2: How to use Quick Search

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

q	uick Search		▼ slovakia		Q	۹	Advanced			
							Select modules to search in	n		
<	Actions	<b>√</b>	Opportunities	1	Contacts	1	Organizations	1	Leads	
	A	•	Documents	1	Calendar	1	Tickets	•	Products	
	0	1	FAQ	1	Vendors	1	Price Books	1	Quotes	
		1	Purchase Order	1	Sales Order		Invoice		Campaigns	
		1	Service Contracts	1	Services	1	SMSNotifier	1	Project Milestones	
		•	Project Tasks	•	Projects		Assets		Comments	
		1	Cashflow		Delivery Notes		Styles 4 You		Quick Reminder 4 You	
		1	Warehouses		Ware. Transfer		Issue Cards		Receipt Cards	
	0									
									Search Cancel	

Picture 3.3: How to enable/disable module for searching

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

Invoice	1							Edit More -
► Invo	oice Details							
▼ Add	dress Details							
	Billing Addre	ess test1				Shipping Addres	s test1	
	Billing PO B	ox				Shipping PO Bo	ĸ	
	Billing C	ity				Shipping City	1	
	Billing Sta	ite				Shipping State	2	
	Billing Postal Co	de				Shipping Postal Code	2	
	Billing Coun	try Slovakia				Shipping Country	/ Slovakia	
► Terr	ms & Conditions							
► Terr	ms & Conditions	Lai	Records	<ul> <li>Slovakia</li> </ul>	St	andard vtiger sear	ching optio	n
► Terr	ms & Conditions	AI	Records	Slovakia     Saarch Berultz (0)	St	andard vtiger sear	ching optio	n
► Terr	ms & Conditions	AII	Records	<ul> <li>▼ Slovakia</li> <li>Search Results (0)</li> </ul>	St	andard vtiger sear	ching optio	n

Picture 3.4: Standard vtiger searching option

Contacts	Opportunities Products Documents Tick	ets Involce All -				
C	Quick Search	enter Q Q Advanced				
<	Invoice1					Edit More -
	► Invoice Details					
	Address Details					
	Billing Address	test1		Shipping Address	test1	
	Billing PO Box			Shipping PO Box		
	Billing City			Shipping City		
	Billing State			Shipping State		
	Billing Postal Code			Shipping Postal Code		
	Billing Country	Slovakia		Shipping Country	Slovakia	
	► Terms & Conditions					
		Quick Search • Slovakia		Quick Search option		
		Quick Search res	ults (1)	······································		
		Invoice (1)		Created On		
		Invoice1		12 days ago		

Picture 3.5: Quick Search option

# 4 Settings

### 4.1 Upgrade

In

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 other button.

😚 Calendar Leads Organizations Conta	icts Opportunities Products Docum	ents Tickets All -	🚱 📸 🖌 🛛 🌣 vdger650 -
⊚vtiger <sup>.</sup>	Quick Search	and press enter Q Advanced	+
Settings	Quick Search 4 You		×-]
<ul> <li>User &amp; Access Control</li> </ul>	Module	Fields which are considered in a Quick Search	Upgrade
► Studio	Assets	Fields from All filter are used	Turn of Uninstall
<ul> <li>Templates</li> </ul>	Calendar	Fields from All filter are used	Turn off Turn on
	Campaigns	Fields from All filter are used	Turn off Turn on
Announcement	Cashflow	Fields from All filter are used	Turn off Turn on
Outgoing Server	Comments	Fields from All filter are used	Turn on Turn off
Inventory: Terms and Conditions	Contacts	Fields from All filter are used	Turn on Turn off
Currencies	Delivery Notes	Eialde from All filter are used	Turn on Turn off

Picture 4.1: Upgrade of Quick Search

port Module f	from Zip	
	Disclaimer - Custom Files could put your CRM at risk This functionality has been made available for Developers to test new modules. If you are installing from a file provided 3rd party, please proceed only if you trust the publisher. Custom Modules could include vulnerabilities and overwrite system files putting your CRM at risk. The module you are about to install has not been reviewed by Vtiger.	e security
[	I accept with disclaimer and would like to proceed	
[	Choose File	Import Cancel

Picture 4.2: Upgrade of Quick Search

Import Successfull	×
module was imported successfully.	
	ОК

Picture 4.3: Upgrade of Quick Search

### 4.2 Uninstall

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

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

R Calendar Leads Organizations Cont	acts Opportunities Products Docum	ents Tickets All -	🐑 💼 🖌 🛛 🌣 vógenőső -
©vtig∈r <sup>.</sup>	Quick Search • Type keyword	and press enter Q Advanced	+
Settings	Quick Search 4 You		
User & Access Control	Module	Fields which are considered in a Quick Search	Status
► Studio	Assets	Fields from All filter are used	Turn of
<ul> <li>Templates</li> </ul>	Calendar	Fields from All filter are used	Turn off Turn on
Other Settings	Campaigns	Fields from All filter are used	Turn off Turn on
Announcement	Cashflow	Fields from All filter are used	Turn off Turn on
Outgoing Server	Comments	Fields from All filter are used	Turn on Turn off
Inventory: Terms and Conditions	Contacts	Fields from All filter are used	Turn on Turn off
Currencies	Delivery Notes		Turn on Turn - ff

Picture 4.4: Uninstall of Quick Search – step 1

2. Click on Uninstall button

Uni	nstall
Remo vTige	ove Quick Search 4 You completely from your r.:
Unir	stall
Ur	install

Picture 4.5: Uninstall of Quick Search – step 2

3. Confirm uninstall by Yes button



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