Search

Table of Contents

1. [Basic Search 2](#_Toc387143522)
2. [Saved Search List 3](#_Toc387143523)
3. [Tags List 4](#_Toc387143524)
4. [Advanced Search 5](#_Toc387143525)
5. [Search Results 7](#_Toc387143526)
6. [Save Search 8](#_Toc387143527)

# Basic Search

**Functional Description**

This view allows the User to perform a quick, unified search.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Search Query | Textbox | Utilize live-search pattern to return matches as the user types.  Search objects include:   * Campaigns * Contacts (People & Companies) * Opportunities * Reports * Saved Searches * Tags |  |
| Search Filters | Button | Display search objects as buttons  When selected, filter results |  |
| Search Results | Dropdown | On each line, include icon indicating the type of object and the result  See Notes and Issues below. |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| [Search Result] | Link | Selecting a search result takes the user to the selected item  See |  |
| Advanced Search | Link | Link to Advanced Search page |  |
| Saved Searches | Link | Link to Saved Search list |  |
| Tags | Link | Link to Tags list |  |

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

1. Display search results as follows:
   1. Campaigns
      1. [Icon] [Campaign Name]
   2. Contacts (People & Companies)
      1. [Icon] [Contact Name]
   3. Opportunities
      1. [Icon] [Opportunity Name]
   4. Reports
      1. [Icon] [Report Name]
   5. Saved Searches
      1. [Icon] [Saved Search Name]
   6. Tags
      1. [Icon] [Tag Name]
2. Limit the number of search results to the top 10 results. If there are more than 10 results, then display ‘More results…’ as the last item.

# Saved Search List

**Functional Description**

This view displays saved and recent searches.

Recent searches include the last 10 searches performed by the User.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Search Name | Link |  |  |
| Tags | Link | When selected, filter table |  |
| Created | Text | Date create by the User |  |
| Last Run | Text | Date last run by the User  Order list in descending order |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Run | Icon | Associated with a record |  |
| Edit | Icon | Associated with a record  Applies to custom reports |  |
| Duplicate | Icon | Associated with a record  Applies to custom reports |  |
| Delete | Icon | Associated with a record  Applies to custom reports | Alert: “You’re about to delete 1 report. Are you sure you want to delete 1 report?”  Buttons: “Delete Report” and “Cancel” |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Search | Link |  |
| Run Search | Link |  |
| Edit Search | Link |  |
| View Search | Link |  |
| Copy Search | Link |  |
| Delete Search | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# Tags List

**Functional Description**

This view displays tags.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Tags | Link |  |  |
| Items Tagged | Text | The number of items tagged |  |

**Actions or Controls**

None

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Search | Link |  |
| Run Search | Link |  |
| Edit Search | Link |  |
| View Search | Link |  |
| Copy Search | Link |  |
| Delete Search | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# Advanced Search

**Functional Description**

This view allows the User to create an advanced search.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Search Name | Text | Display if search has been saved |  |
| Tag(s) | Textbox | Display if search has been saved |  |
| **Filters** | | | |
| Filter Logic | Dropdown | Options include:   1. AND 2. OR 3. Custom |  |
| Custom Logic | Textbox | Display if Filter Logic = Custom  Display between Filter Logic dropdown and Filter rows  Default to “AND” statements  Example: “1 AND 2 AND 3” |  |
| Custom Filter Number | Text | Row number for the Custom Filter | At least one Custom Filter is required |
| Custom Filter Field\* | Dropdown | Options include fields associated with the option selected | At least one Custom Filter is required |
| Custom Filter Field Qualifier\* | Dropdown | Options may include:   1. Contains 2. Does not contain 3. Is 4. Is not 5. Is empty 6. Is not empty 7. Is equal to 8. Is not equal to 9. Is greater than 10. Is greater than or equal to 11. Is less than 12. Is less than or equal to   Exact options are dependent upon the Field selected | At least one Custom Filter is required |
| Custom Filter Search Value\* | Depends upon Selection | The type of input depends upon the Field selected | At least one Custom Filter is required |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Add custom filter | Link | Adds a custom filter |  |
| Delete custom filter | Icon | Deletes selected custom filter and updates Filter Logic |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Run Search | Link | If at least one search criteria has been performed |
| Save Search | Link | If at least one search criteria has been performed |
| Save Search As | Link |  |
| Delete Search | Link | If Search has been saved |

**Exceptions**

None

**Notes and Issues**

1. When saving, require ‘Search Name’ and at least one search criteria.

# Search Results

**Functional Description**

This view shows results below the search criteria form described above.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| **Contact Search Results** | | | |
| Name | Text | Concatenate First Name and Last Name |  |
| Email | Link | Primary Email  Triggers email form |  |
| Phone | Text | Primary Phone |  |
| [Search Filters] | Text | Search filters listed in order of search |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Columns | Button with Dropdown | Dropdown containing a list of all available fields  Dropdown also includes search functionality  Multiple values may be selected via checkbox  Selected fields may be reordered, which affect |  |
| Export to Excel | Link | Generates Excel version and returns to browser |  |
| Export to PDF | Link | Generates PDF version and returns to browser |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Search | Link |  |
| Save Search As | Link |  |
| Delete Search | Link | If Search has been saved |

**Exceptions**

None

**Notes and Issues**

None

# Save Search

**Functional Description**

This view allows the User to save a search via a dropdown form.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Search Name\* | Textbox | Field displays as a textbox until a value is entered and saved  Default value to “Untitled Search ([date])”  Example: Untitled Search (1/1/2014)  May be modified inline  Once saved, the value is displayed as text |  |
| Tag(s) | Textbox | Display existing tags within a textbox and allow new tags to be added within textbox  Use live search pattern to return matches as the user types |  |

**Actions or Controls**

None

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Search | Button |  |
| Cancel | Link |  |

**Exceptions**

None

**Notes and Issues**

None