
\ "Company\" Field available in quick search.

Posted by rcarsello - 2007/12/26 22:16

In the handy search box currently in the upper right hand corner of many screens, you should be able to select "Company" as one of the options on the drop down menu.

http://community.infusionsoft.com/images/fbfiles/images/CRM_account_search-8b66d8a5c98cdc57455801013882e745.jpg

-The only way to search for a company is to go to the "Contact Search (Basic)" screen.

-Selecting to search the "lead" data field is not an alternative because using this option surprisingly results in a search Not of the "lead names" but instead it does a search of the people's names (the contact field) in the lead record. In fact, I couldn't find a way to search for what is called the "lead name" in the lead records anywhere.

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Re:\ "Company\" Field available in quick search.

Posted by jsttcom - 2008/01/03 23:56

Rob, there may be a way to do what you're trying to do. To search for the company 'Widgets, Inc', Keep the dropdown as Contact, and enter this in the search criteria:

% % Widgets

This will search for contacts with any first or last name, but with the company name that starts with 'Widgets'. More examples:

- >'Sco Mar' (first name starts w/Sco and Last Name starts with Mar)
- >'% Mar' (Any first name, last name starts with Mar)
- >'Sco %' or 'Sco' (First name starts w/Sco, any Last Name)
- >'scott@infu' (email starts with scott@infu)
- >'8668000004' (phone starts with 8668000004)

Some of these I'm sure you already knew, but for others' reference I thought I'd post these little search secrets. BTW, I believe these only work with the Contact search in the upper right (not on Lead Search, etc.).

Best!

Scott

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Re:\ "Company\" Field available in quick search.

Posted by rcarsello - 2008/01/04 02:42

<http://community.infusionsoft.com/images/fbfiles/images/lucy.jpg>

Good tip!

'% % Widgets' indeed searches the company field.

Also, I see that '%@Widgets' gives me all the records with an email address that ends with @widgets, such as @widgets.com or @widgetstore.com

and also useful: '%@aol' gives me all the email addresses ending in aol.com.

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Re:"Company" Field available in quick se

Posted by rcarsello - 2008/01/04 17:05

I have been trying this and called Support.

Right now

"% % Widget, Inc" does not return the desired search results.

However, I did find two useful searches.

1. If you select "lead" from the drop down you can search all the lead records' Lead Title.
So "widget" gives me all the lead titles that begin with that term.

And "%widget" gives me all the lead records that contain the term somewhere else in the lead record.

So it appears to be useful if you have set up lead records and they contain the company or customer name you want to search on.

As an aside, it appears that the "Lead Name" field really never shows up on any client correspondence, so you can name a lead anything that will allow you to identify the lead, eg. Tall guy from Texas, etc.

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