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How Do You Do a Quick Search on an order?

Tammy Mason - 2022-07-20 - in Quotes, Orders & Invoices

How Do You Do a Quick Search on an order?

 The quick search has been added to allow you to quickly find an open or closed quote, order, or invoice. The quick search is found in the top right of the header and is always available for use.
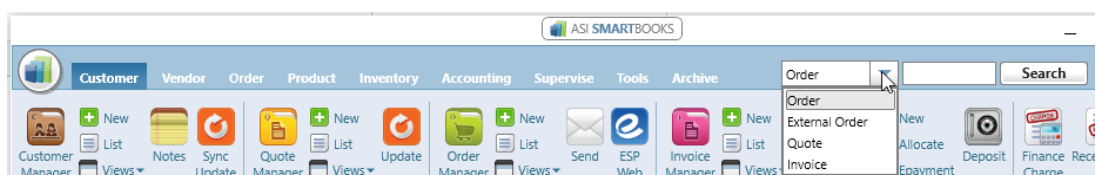
The default resource type is Order, but once the user selects a resource (quote, order, invoice), that selection will default until the user changes the selection.

When the search is executed, an edit tab will be opened with the selected resource displayed. Once the search has been executed, the quick search lookup control will be cleared, ready for the next lookup to be entered.