

# 8. How to Search the Actions Table

The **Search** bar lets you quickly find individual actions by typing keywords, UIDs, client names, or text snippets. Unlike filtering (structured queries by date, type, etc.), Search performs a free-text lookup across multiple columns in real time.

Search operates independently from Fast Filters and is not stored within saved filter configurations.

**1. Locate the Search Bar:** Above the **Actions** table, next to the **Filter** button, you'll see a rounded **Search...** input.

## 2. What the Search Covers

By default, typing into **Search** will match against these columns:

Column	Example Matches
<b>UID</b>	<input type="text" value="ca00000u"/> , <input type="text" value="CA000012"/>
<b>Type</b>	<input type="text" value="Note"/> , <input type="text" value="Call"/> , <input type="text" value="Comment"/>
<b>Client</b>	Client's first or last name (e.g. "Smith")
<b>Text</b>	Any portion of the action's text body

**Tip:** Search is case-insensitive and supports partial matches (e.g., "morga" finds "morgan").

## 3. Performing a Basic Search:

**Click** in the **Search...** field.

**Type** your query (e.g.,  or ).

As you type, the table filters instantly to show only rows containing that term in any searchable column.

## 4. Combining Search with Filters:

**Search + Filter** gives you ultimate flexibility. For instance, you can:

**1) Filter** by **Type = Call** (show only calls).

**2) Search** for "xavier" to see only call records made to client *xavier*.

To clear the search, click the × icon inside the search field or press Esc. Clearing search does not affect structured filters.

## Best Practices

1. **Start Broad:** Begin with a single keyword, then narrow using filters if needed.
2. **Use Unique Identifiers:** For exact lookups, searching by full **UID** is fastest.
3. **Partial Text Queries:** Enter part of a longer note or comment to catch all similar entries.
4. **Combine Terms:** While the search itself doesn't support multiple terms joined by AND/OR operators, you can type a phrase (e.g., `morgan invoice`) to match rows containing both words anywhere in the record.

With these steps, you can swiftly drill down to any Action—whether it's a specific note, call log, or comment—by simply typing in a few characters, making it easy to locate records without navigating through pages of data.

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