

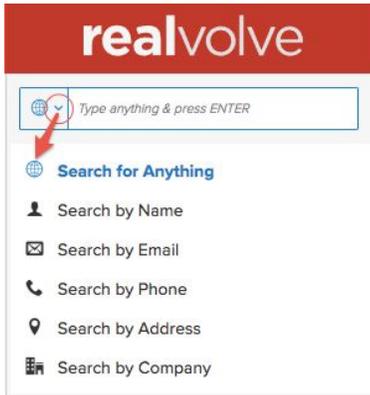


Realvolve Search

Enhanced Features and Improved Speed

The **Search** feature in Realvolve is capable of finding virtually anything from any field in the database. Enter the required text in the search box and the system will check every indexed field and display what it finds. One challenge however, is that it can return more information

that you want because the search text is located in several fields. To do a focused search on a specific field, change the **Search for Anything** to **Search by Name, Email, Phone, Address** or **Company** using the down arrow in the search box to make a selection. This will limit the search to the selected field and return better results.



By default, the system uses a **Begins With** search process which means it will find all the records in the database that have field values that begins with what you are searching for.

Using the “**Search for Anything**” option and typing “**Joh**” will find any record in the database that has a field value beginning with “**Joh**”. This could be a first name of “**Joh**n”, a company name of “**Joh**nston Realty” or any note on the radar with any word starting with “**Joh**” in the text. Changing to “**Search by Name**” would make sure that it only looks in the contact name field for “**Joh**”.

Another useful feature is multiple word searching... Typing “**Jo Sm**”, (*note the space between Jo and Sm*), would find any record in the database where a field has a value beginning with “**Jo**” and “**Sm**” so it would return “**John Smith**” but not “**John Jones**” since it does not have the “**Sm**”. The space indicates a new word or criteria as part of the search. This will greatly reduce the number of records returned and give more accurate results.

Wildcard Characters:

What if you want to search for “**Contains**” instead of “**Begins With**”? We’ve added the ability to use “**Wildcard**” characters as part of the search. Use the Asterisk “*****” character, (*also known as “star”*), as a wildcard to search in the middle of words. Typing “***son**” would find records containing “son” like “**Sonya**”, “**Johnson**”, or “**personal**”.

Another wildcard character which we have added is the question mark “**?**” character. Using the question mark in your search word is like having an unknown placeholder for one character. You could type “**S?n**” to find any records where the field begins with “**S**”, has one unknown second character then the letter “**n**”. This would return records beginning with “**San**”, “**Sen**”, “**Son**” or any number of other results. It is also possible to use multiple question marks like “**M??k**” will find “**Mark**”, “**Mick**” or any other word where there are 2 characters between an ‘M’ and a ‘k’.

Now let's get really creative... let's say you need to search for a contact but don't remember the first name but the last name was something like "Johnson", "Johnsen", "Johansson" or "Jonson". You can search for "Jo*s?n" and find any name that starts with "Jo", has any number of characters to up an "s", some unknown character then the letter "n"... returning contacts like "Johnson", "Johnsen", "Johansson" or "Jonson".

Improved Speed:

While the new searching features are awesome, the most important part of the update is the increased speed. Previous to this update, a search process could take 6 to 9 seconds, realvolve now returns the search results in less than 2 seconds or in some cases less than 300 milliseconds. When you consider there are 1000 milliseconds in 1 second it means we get the results in 1/3 of a second... The only exception to this is when using Wildcard characters " * " or " ? ", it may take a 1 to 2 seconds extra but even that is faster than our old search methods.

In addition to the "actual" speed improvements, we've added process indicators to let you know that something is happening and helps with "perceived" speed. The search will be very quick but we've



included a search spinner which shows that it is working after you press the **Enter** key.

Workflows and Templates

Similar performance improvements and wildcard features have been added to the Workflows and Templates search box. This should dramatically improve the ability to find what you are looking for and reduce the number of ambiguous results.

Wildcard Tips:

- Use the Asterisk " * " character, (*also known as "star"*), as a wildcard to search in the middle of words. Example: "*son" would find records containing "son" like "Sonya", "Johnson", or "personal".
- Use the question mark " ? " character as a placeholder for an unknown character. Example: "S?n" would find any records where the field begins with "S", has one unknown second character then the letter "n". This would return records beginning with "San", "Sen", "Son" or any number of other results. It is also possible to use multiple question marks like "M??k" will find "Mark", "Mick" or any other word where there are 2 characters between an 'M' and a 'k'.
- Use the Asterisk " * " and Question Mark " ? " in combination if needed. Example: "Jo*s?n" would search for any name that starts with "Jo", has any number of characters to up an "s", some unknown character then the letter "n"... returning contacts like "Johnson", "Johnsen", "Johansson" or "Jonson".