Desktop Search

Overview

The new Desktop includes a global Search feature that allows you to locate information across Edge without first navigating to a specific menu. Desktop Search settings give each store more control over the scope of searches, helping reduce unnecessary results and keep the information returned relevant to the work being performed.

You can control what is included in Desktop Search through **Desktop Search Settings**. The Desktop Search Options window notes that each search query costs time, so consider unchecking any areas you do not need or want to search. This can help narrow results and improve search speed.

Setup

Customize Desktop Search

1. Use the Search bar at the top of the screen to find **Desktop Search Settings**, or click the gear icon in the upper-right corner and select **Advanced Settings** then **Desktop Search Settings**.
2. Review the available **Desktop Search Options** and choose which areas of Edge should or should not be included in your searches.
3. Uncheck search areas you do not need. Each enabled option can add time to a search, so limiting the search scope can return results more quickly and keep them more relevant.

4. Select **Save / Close** to apply your changes.

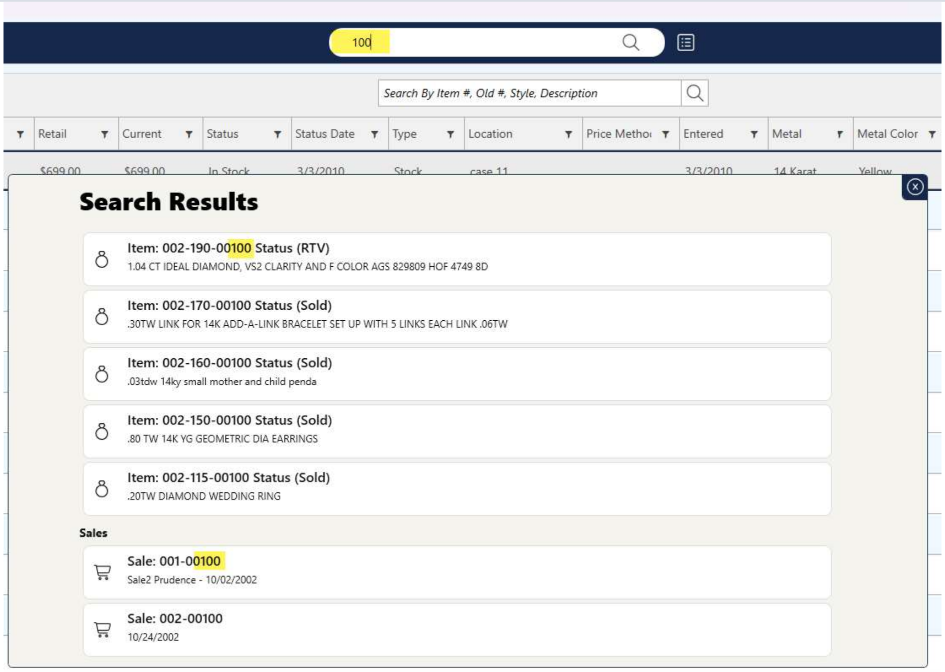
Desktop Search Options

TIP The Search Options window specifically notes that each query costs time. For the best experience, leave checked only the areas your store actually needs to search.

Using Desktop Search

Enter your search term in the Search bar at the top of the Desktop. The results shown will vary based on the selections enabled in **Desktop Search Settings**, so a store that searches Customers, Items, and Sales may see different result groups than a store that has some of those areas disabled.

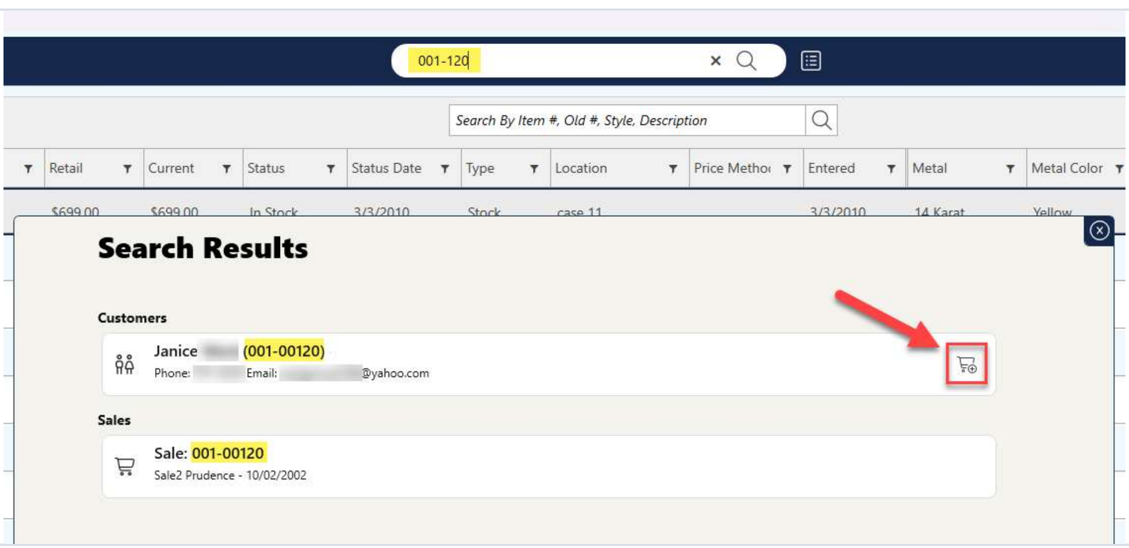
Desktop Search displays helpful details directly in the results so you can identify the correct record before opening it. Depending on the result type, this can include **Customer status** such as **Inactive**, as well as **Item Status** such as **Sold, In Stock,** or **RTV**. Sales results can also appear when the search criteria match an existing transaction.



Example: matching Item and Sales results

Work with Customers from Search Results

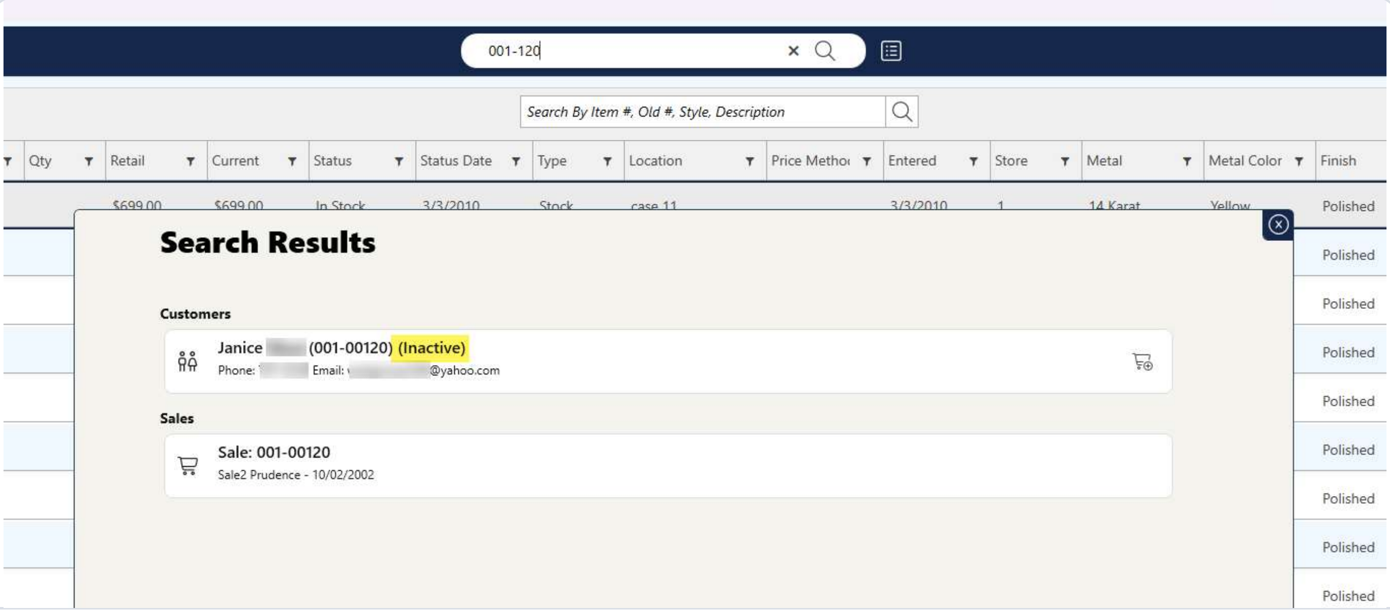
When a Customer is found, use the **shopping cart icon** on the Customer result to add that customer directly to Point of Sale. This keeps the sales process moving swiftly and seamlessly by letting you move from search to the transaction without first opening the full Customer record.



Use the shopping cart icon to add the found Customer directly to POS

Identify Customer Status at a Glance

Customer status is shown within the search result when it is pertinent. For example, an **Inactive** label appears next to an inactive Customer so associates can recognize that status before continuing. The shopping cart option remains available from the result when you are ready to move the customer into Point of Sale.



Example: an Inactive Customer identified directly in Desktop Search

REMEMBER

Search results are driven by the options selected under **Desktop Search Settings**. If an expected result type is missing, review those settings to confirm the applicable search area is enabled.