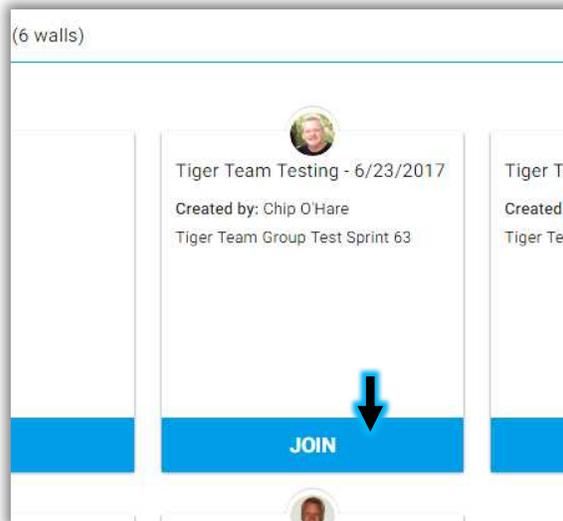
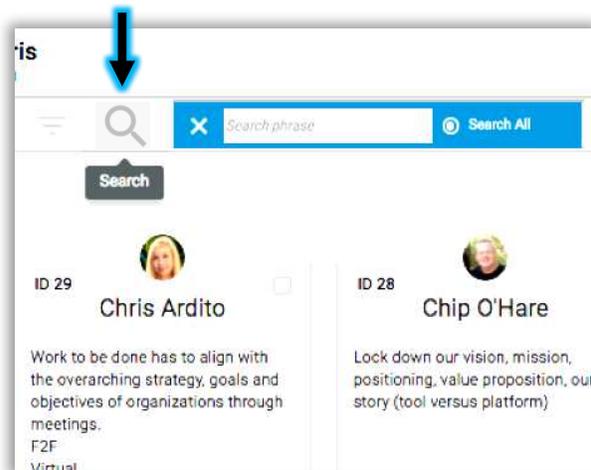


How to Search And Filter Notes

Go to the 'Home' screen, find your meeting and select 'JOIN'.



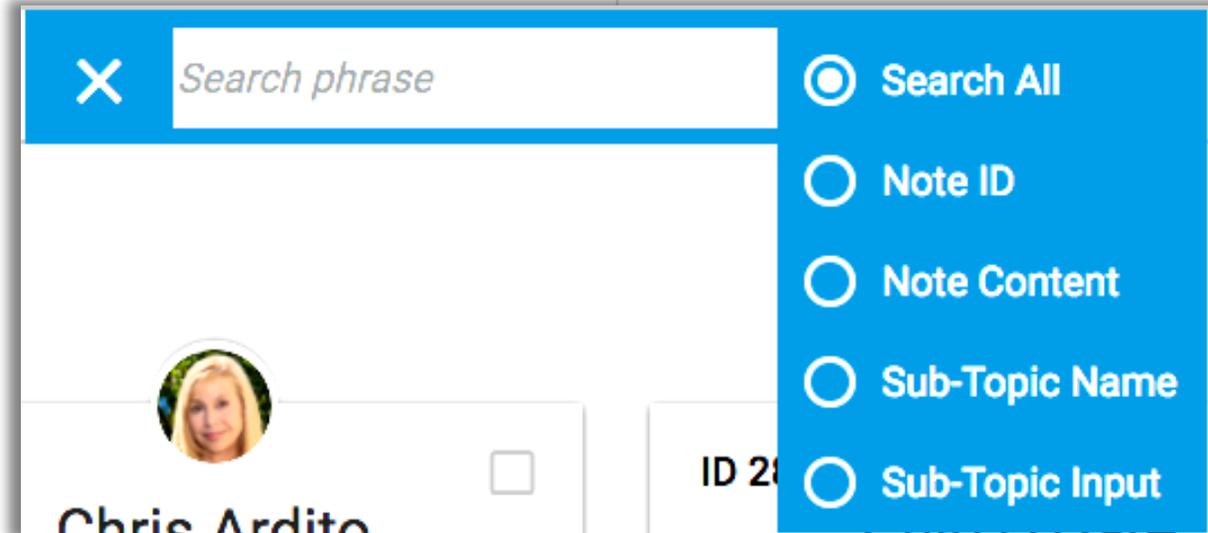
Select the magnifying glass icon to open the search window. Enter your search text and the target notes will be displayed. Selecting 'X' will clear your search.



SEARCH NOTES

For more refined search options, select the 'Search All' button to access additional search parameters:

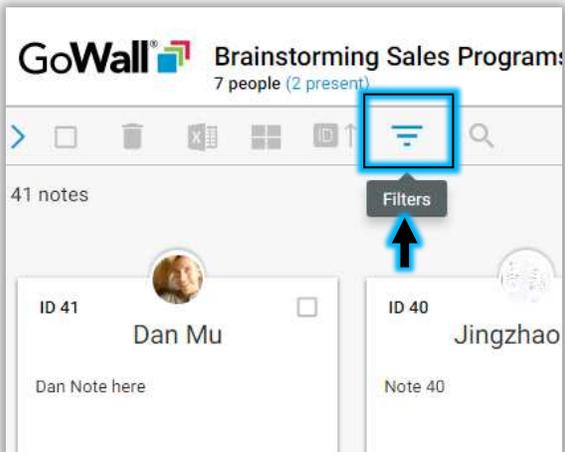
- Note ID: With one ID or a range using commas and hyphens
- Note Content: Only searches the 750 character note field
- Sub-Topic Name: Displays notes with that Sub-Topic Name
- Sub-Topic Input: Displays notes matching Sub-Topic-Input



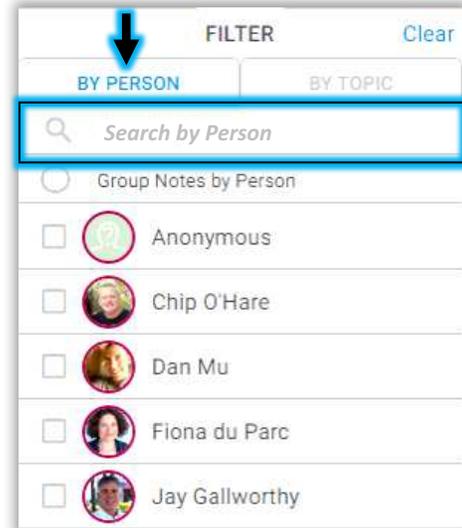
How to Search And Filter Notes (Continued)

FILTER NOTES BY PERSON

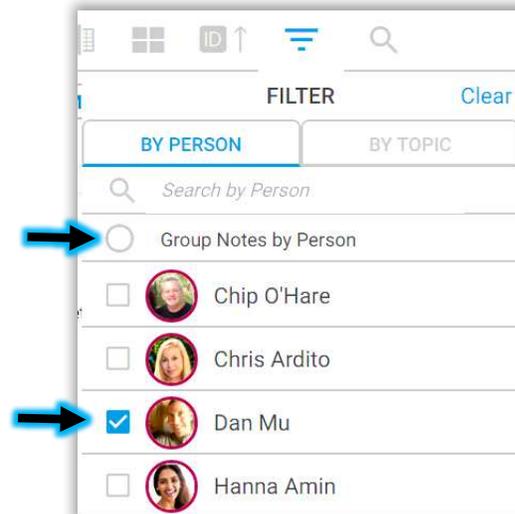
To filter notes by person, select the 'Filters' icon.



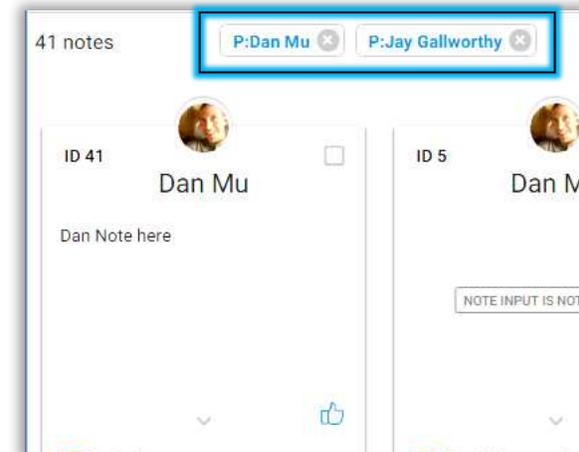
In the filters dropdown, select the 'By Person' tab to filter by an individual or by multiple people. Note that you may also search by person using this tab.



Select the target individual(s). You may also group notes by person. Once selected, your note wall will display filtered and/or grouped notes.



A bubble will appear to indicate each active filter. Select the 'X' within a bubble to remove that specific filter or select 'Clear' in the filter dropdown to clear all filters.



How to Search And Filter Notes (Continued)

v2

FILTER NOTES BY TOPICS AND SUB-TOPICS

To filter notes by topic select the 'Filters' icon. Click on the 'Topics' tab to display a list of topics. Select the topic(s) for filtering or 'Search' for a topic using the search bar.

To filter by sub-topic value, click the arrow to the right of the topic to expand all sub-topics. Then select the arrow to the right of the sub-topic to show the sub-topic values. You may select one or 'Group' any or all values.

Select your desired sub-topic and value(s) to filter. Once selected, your 'Notes Wall' will show the target filtered notes.

A bubble will appear to indicate each active filter. Select the 'X' within a bubble to remove that specific filter.

