

Use the General Search option to find anything and everything on your database. This can be for candidates, clients or client staff, or even leads for business development.

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intelligence Cheat Sheet: General Searches

Quick Search for Candidates

1. Click On Search on the Candidate screen to run a quick general search for candidates.

The screenshot shows the 'Intelligence' software interface. The main window displays the profile of Bernadette Sulsters, a candidate from South Africa. The profile includes a photo, name, location, and registration date (118 days). It also shows related clients (Intelligence Software), employment/education history (Technical Support, Trainer), and communications. A search bar is visible at the bottom of the profile view.

2. Search for keywords in the original CV or profile (which includes employment/education history and top card information), , and filter by classifications (using the same concepts as the Vacancy Search (Cheat Sheet #4 - page 2 & 3).

Click on the Green button to run your search

3. Matching candidates will be displayed in the form. Simply select a name to view that profile.

The screenshot shows the search results page in the Intelligence software. The search bar contains the query "php" AND "sql". The results list several candidates, including Bernadette Sulsters, who is highlighted. A green box highlights the "+" and "Tag All" buttons for Bernadette Sulsters.

4. You can add the selected candidate to the shortlist for the current vacancy (displayed at the top of the form – this is the vacancy & client that is on focus on the client screen)

5. You can TAG the candidate to be included in a bulk mail

intelligence Cheat Sheet: General Searches

Quick Search for Clients

1. Click On Search on the Client screen to run a quick general search for clients.

The screenshot shows the 'Intelligence Software' interface. At the top, there's a navigation bar with 'Intelligence Software' and a 'Classifications' dropdown menu set to 'Status > Current Client'. Below this, there's a client profile card for 'Bernadette Sulsters' with contact details: '+27 21 3002354 | +44 2890 998 688' and 'www.intel-sw.com'. To the left, there's a 'Company Contacts' list with 'Bernadette Sulsters' and 'Shane McCusker'. Below that, there's a 'Communications' section showing a message from 'Shane' on '06 May 22' with the subject 'Client Record Created by Shane'. On the right side of the profile card, there's a search bar with 'Search', 'Vacancies', and 'People (75)' tabs. Below the search bar is an 'Add Filter' button and a 'Filter by Classification' dropdown menu.

2. Search for keywords in the Client profile, and filter by classifications.

Click on the Green button to run your search

3. Matching clients will be displayed in the form. Simply select a name to view that profile.

The screenshot shows the search results list. At the top, there's a search bar with the text '"fees agreed"' and a green search button. Below the search bar is an 'Add Filter' button and a 'Filter by Classification' dropdown menu. The search results are displayed as a list of client names: '3I Group PLC', 'AB Food', 'Intelligence Software', 'Partygaming PLC', 'Pearson', 'Prudential', 'Reckitt Benckiser', 'Reed Elsevier', 'Rentokil Initial', 'Reuters Group', and 'Rexam'. The 'Intelligence Software' entry is highlighted with a green bar on the left.

4. There are no further actions to be taken here (like bulk emailing). If you want to email company contacts, you will have to do an Advanced Search (page 4).

intelligence Cheat Sheet: General Searches

Advanced Search for anything and everything

1. Click On **Search** on the Candidate (or Client) screen and then select the **Advanced Search** button

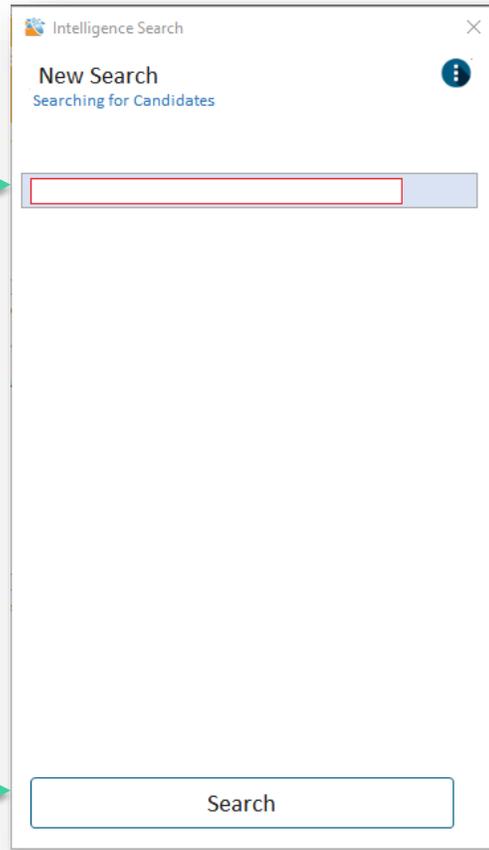
The screenshot shows the Intelligence software interface. The main header displays the candidate's name, 'Bernadette Sulsters', and their location, 'South Africa'. Below this, there are sections for 'Related Clients', 'Employment/Education History', and 'Communications'. A green box highlights the 'Search' button in the 'Employment/Education History' section. A blue arrow points from the 'Search' button to the 'Advanced Search' button in the bottom right corner of the profile view.

2. The Advanced Search allows you to search anything and everything in your database – start a New Search by clicking on the **BLUE** text to swap between Candidates, Clients, Client Staff (Company Contacts) or Candidate Employment/Education (Leads)

The screenshot shows the 'Intelligence Search' dialog box. The 'New Search' section is active, showing a search input field and a dropdown menu with options: 'Candidates', 'Clients', 'Clients Staff', and 'Candidate Employment/Education'. A 'Search' button is visible at the bottom.

Advanced Search [continued]

3. Click into the RED section to add your search criteria



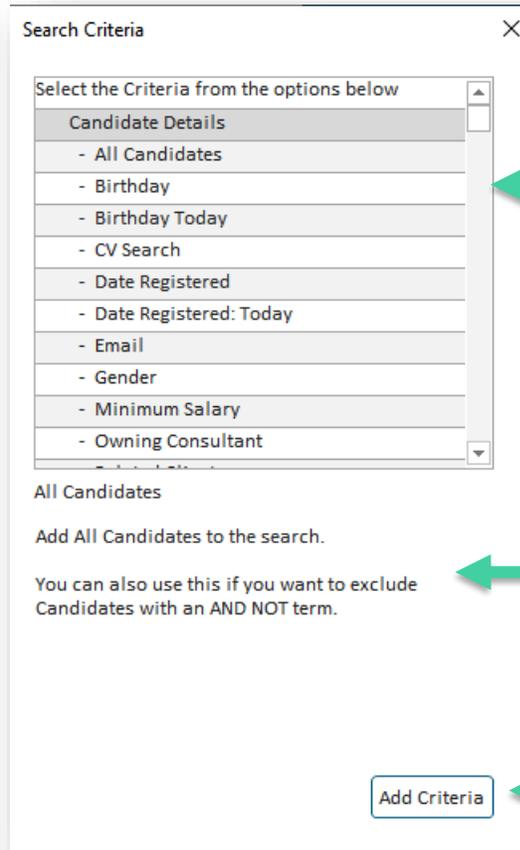
Intelligence Search

New Search
Searching for Candidates

[Red-bordered input field]

Search

7. Once you have added all your criteria, click on the Search button to run your search and see the results.



Search Criteria

Select the Criteria from the options below

- Candidate Details
 - All Candidates
 - Birthday
 - Birthday Today
 - CV Search
 - Date Registered
 - Date Registered: Today
 - Email
 - Gender
 - Minimum Salary
 - Owning Consultant

All Candidates

Add All Candidates to the search.

You can also use this if you want to exclude Candidates with an AND NOT term.

Add Criteria

4. Select one of the categories to expand and select the required item

5. Each type will have a description in the bottom half of the form, and a data entry section for you to add specific criteria (see next page for more detail)

6. Click on the Add Criteria button to add each item to build your search parameters.

Advanced Search [continued]

5. There are a few different types of criteria to choose from:

5a. PRE-SET searches:
e.g All Candidates

You can't edit the criteria for these searches.

All Candidates

Add All Candidates to the search.

You can also use this if you want to exclude Candidates with an AND NOT term.

Minimum Salary

Search for Candidates whose Minimum Salary is within this range.

Greater or equal to

AND less than

5c. NUMBER: You MUST search for a range.
e.g.
Greater or equal to 25
AND less than 15

This will result in any value between 15 and 25.

5b. TEXT: Boolean type searches
(see last page)

Current Job Title

Search for Candidates by Current Job Title.
You can link your keywords and phrases with OR, AND, AND NOT. Use % as a substitute for any number of characters, or _ as a substitute for a single character.

Date Last Contacted

Search for Candidates whose Last Contacted Date is within the specified date range.
You must use a specific date range, or a date relative to NOW (eg NOW-7 means 7 days ago, NOW+7 means in the NEXT 7 days).

Greater or equal to

AND less than

5e. DATE: You MUST search for a range.
e.g,
Greater or equal to 01/01/2022
AND less than 31/01/2022

This will result in values between 1st and 31st January 2022.

5d. DROP-DOWN SELECTION:
select data from the drop-down list

Owning Consultant

Search for Candidates where the Owning Consultant is set to the specified username.

You can also search on date relative to NOW, where NOW is today.
e.g.
Greater or equal to NOW-7
AND less than NOW-0

This will result in values from the last 7 days.

intelligence Cheat Sheet: General Searches

Example: Advanced Search for a Sales Manager

I am looking for any candidate where:

The candidate's current job title is Sales Manager

OR

The candidate has been shortlisted to a similar vacancy

AND

The candidate has been classified under Sales/Marketing

AND NOT (excluding)

The candidate has been classified as a Junior

Intelligence Search

New Search
Searching for Candidates

Current Job Title "sales manager" OR

Shortlisted on a similar vacancy "sales manager" OR

AND

Candidates with this classification > Sales/Market OR

AND NOT

Candidates with this classification > Junior OR

AND AND NOT

Search

Matching candidates will be displayed in the form. Simply select a name to view that profile.

Search Vacancies Shortlist

back to Basic Search Search Criteria

New Search Tag All

Amy C	+	<input type="checkbox"/>
Anton L	+	<input type="checkbox"/>
Bernadette S	+	<input type="checkbox"/>
Brenda C	+	<input type="checkbox"/>
Cameron M	+	<input type="checkbox"/>
Edward B	+	<input type="checkbox"/>
Frank R	+	<input type="checkbox"/>
Marco B	+	<input type="checkbox"/>
Shawn A	+	<input type="checkbox"/>

Records 1 to 9 of 9

Hold your cursor over the scroll bar to see the total number of records

4. You can add the selected candidate to the shortlist for the current vacancy (displayed at the top of the form – this is the vacancy & client that is on focus on the client screen)

5. You can TAG the candidate to be included in a bulk mail

Boolean search

Boolean searching, or searching for keywords or phrases on the candidates' original CV or profile (which includes employment/education history and top card information) follows **3 simple rules**:

1. You can use any combination of keywords – use quotation marks " " to get results with an exact match.

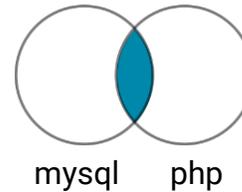
e.g. "mysql"

2. You need to link your keywords and phrases together with the operators **AND | OR | AND NOT**

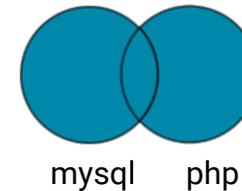
e.g. "mysql" AND "php"

3. Use parentheses () to group together keywords linked with the operator OR,

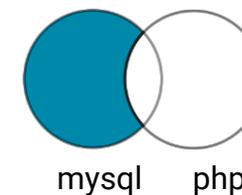
e.g. "mysql" AND ("php" OR "java") will provide results that are initially filtered to contain at least one of "php" or "java", and then further refined to include "mysql"



The AND operator tells the search engine to find all profiles that include both terms (in this case BOTH mysql and php)
e.g: "mysql" AND "php"



The OR operator tells the search engine to find all profiles that include either of the terms, or both terms (in this case mysql , or php or mysql & php)
e.g: "mysql" OR "php"



The AND NOT operator tells the search engine to exclude profiles that contact a certain term (in this case profiles containing the word php will be excluded)
e.g: "mysql" AND NOT "php"