intelligence Cheat Sheet: General Searches

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.

1. Quick search for Candidates page 2
2. Quick search for Clients page 3
3. Advanced Search for anything and everything page 4,5,6
4. Example Search page 7
5. Boolean search page 8

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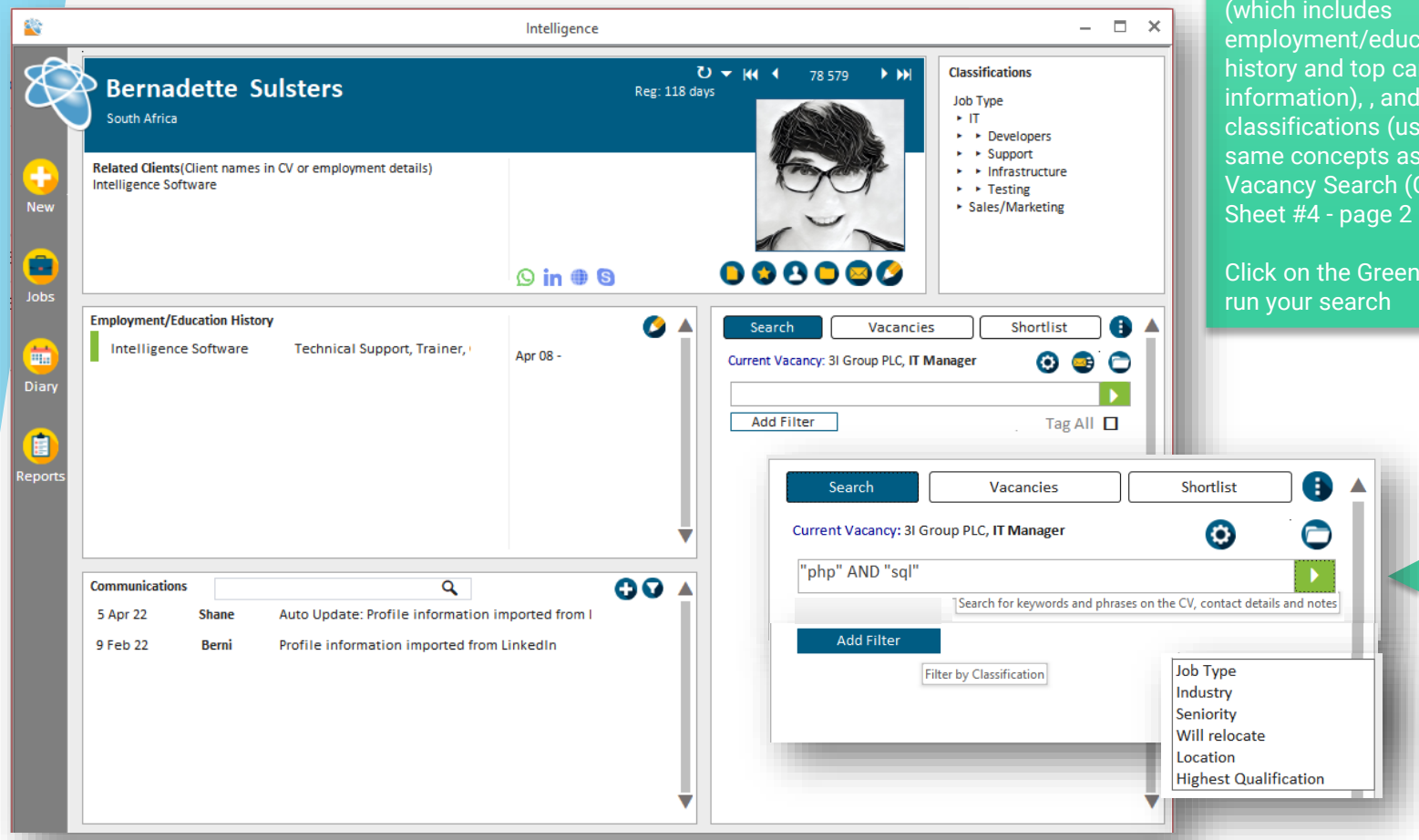
intelligence Cheat Sheet: General Searches

Quick Search for Candidates

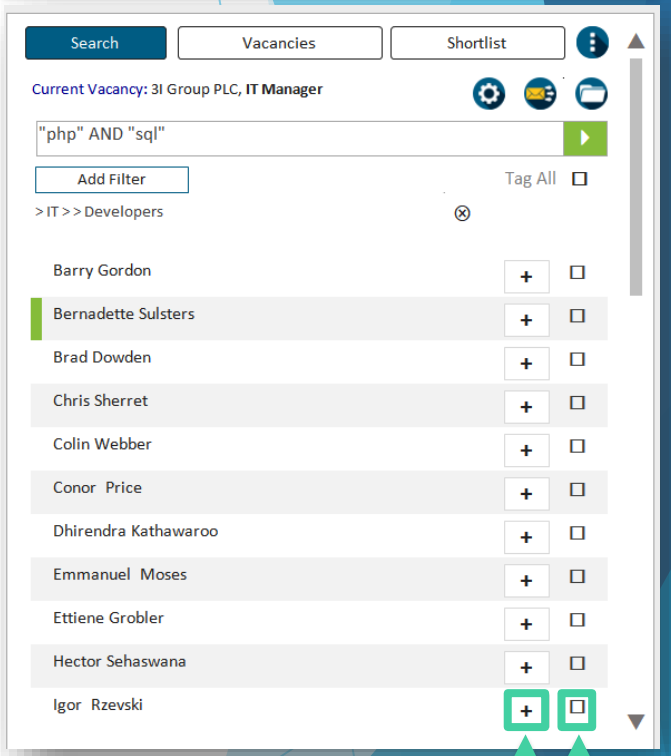
1. Click On Search on the Candidate screen to run a quick general search for candidates.



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.



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

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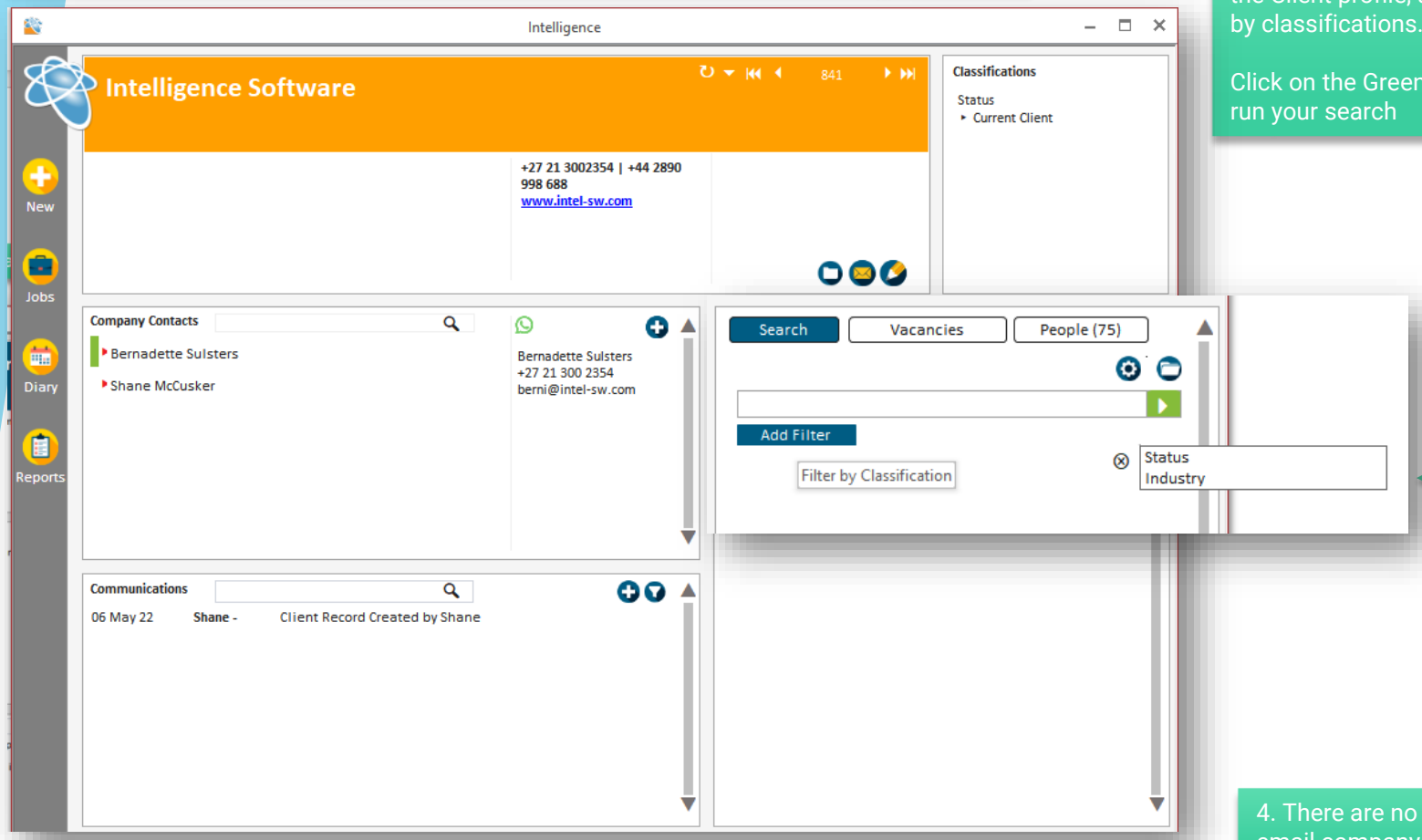
intelligence Cheat Sheet: General Searches

Quick Search for Clients

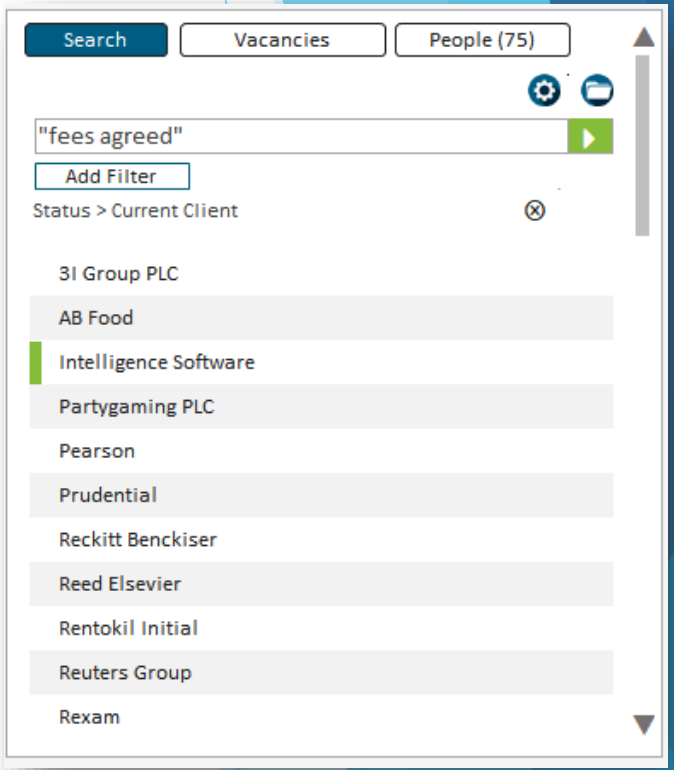
1. Click On Search on the Client screen to run a quick general search for clients.



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.



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).

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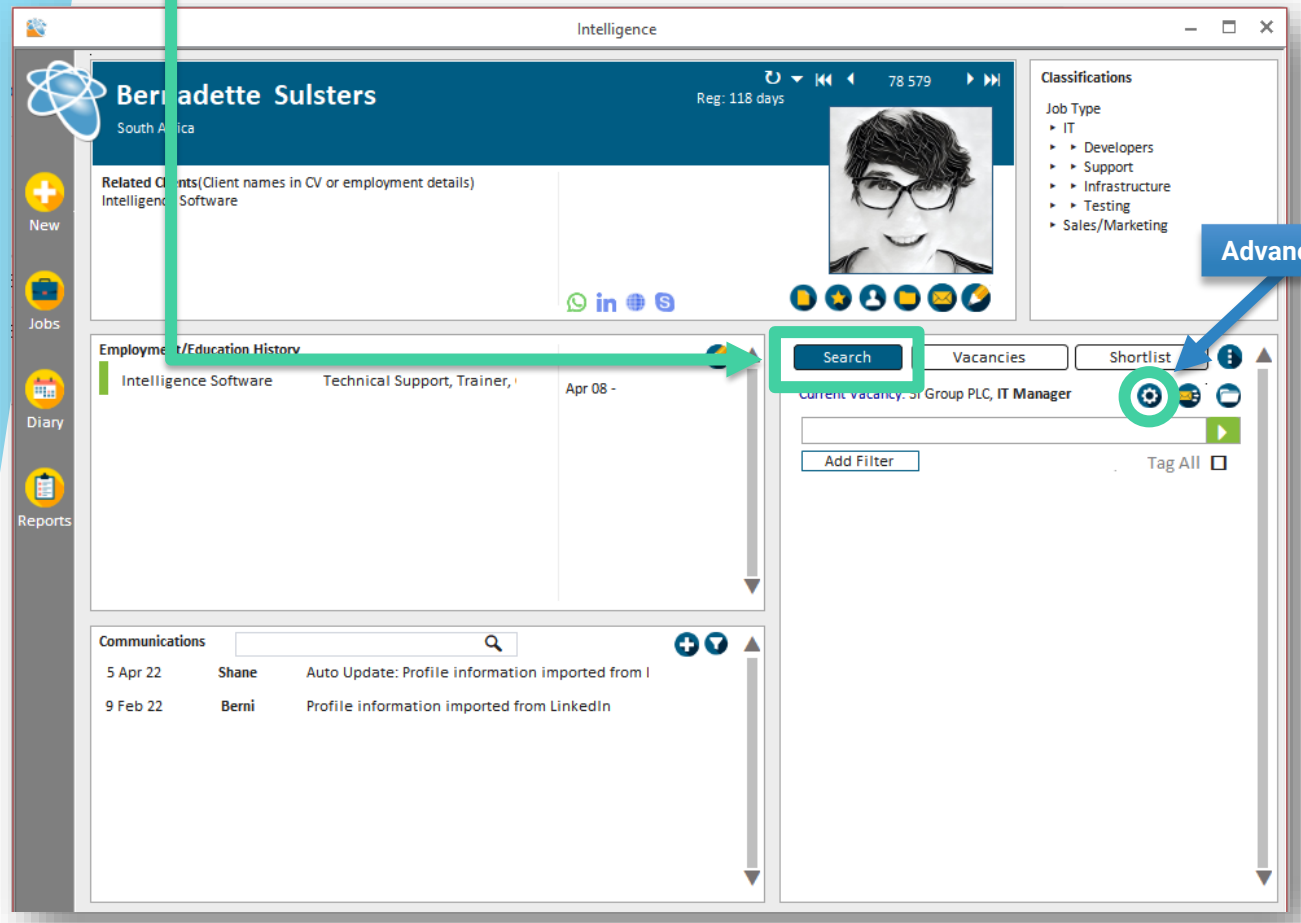
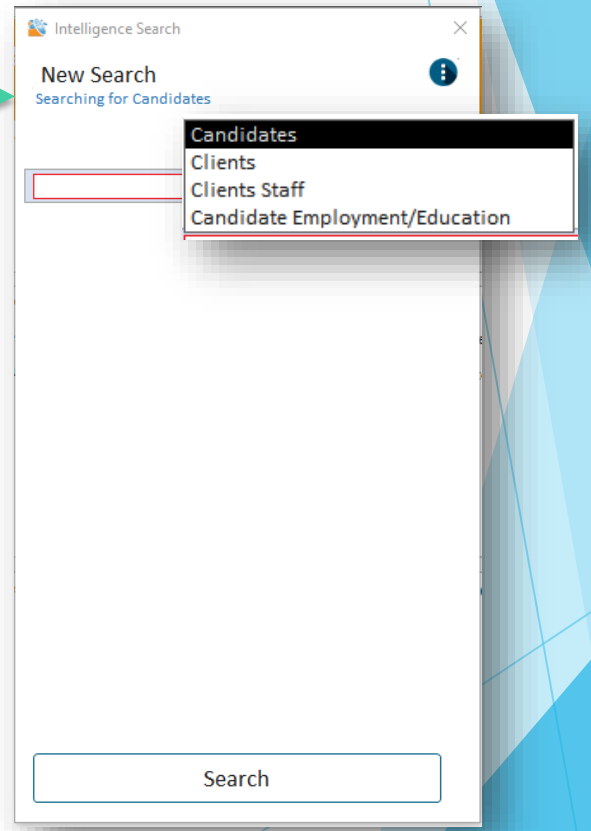
intelligence Cheat Sheet: General Searches

Advanced Search for anything and everything

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



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)



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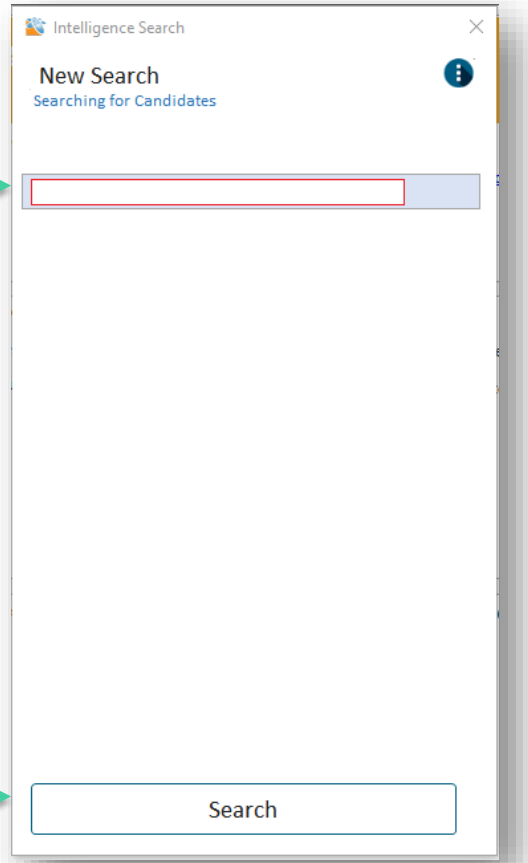
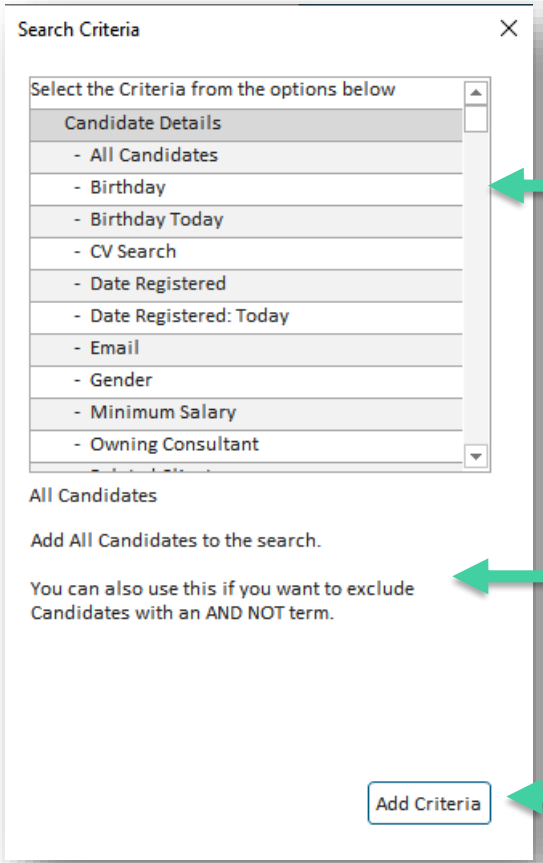
intelligence Cheat Sheet: General Searches

Advanced Search (continued)

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

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

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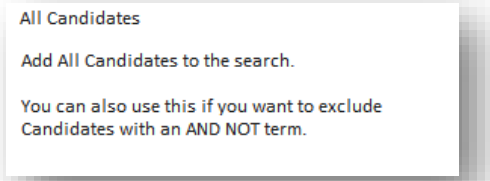
intelligence Cheat Sheet: General Searches

Advanced Search (continued)

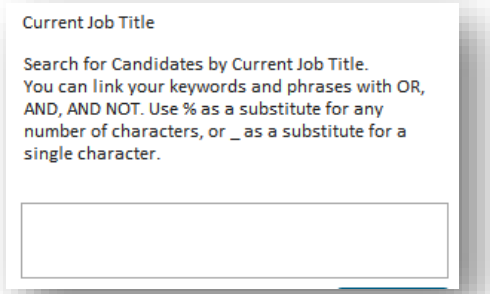
5. There are a few different types of criteria to choose from:

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

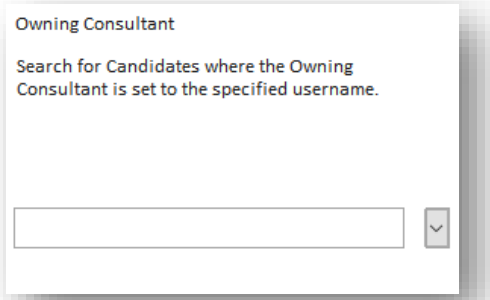
You can't edit the criteria for these searches.

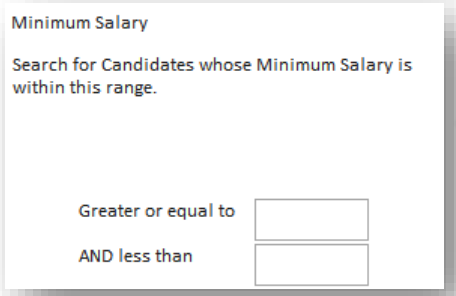


5b. TEXT: Boolean type searches (see last page)



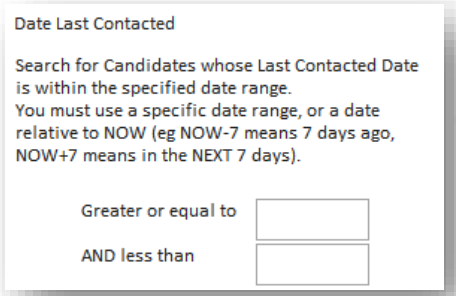
5d. DROP-DOWN SELECTION: select data from the drop-down list





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.



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.

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.

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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

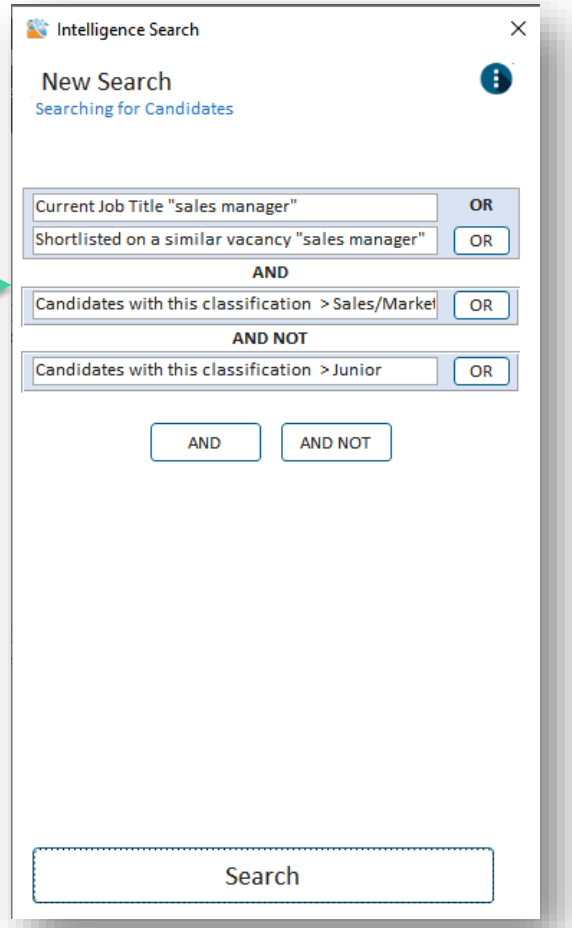
The candidate has been shortlisted to a similar vacancy

AND

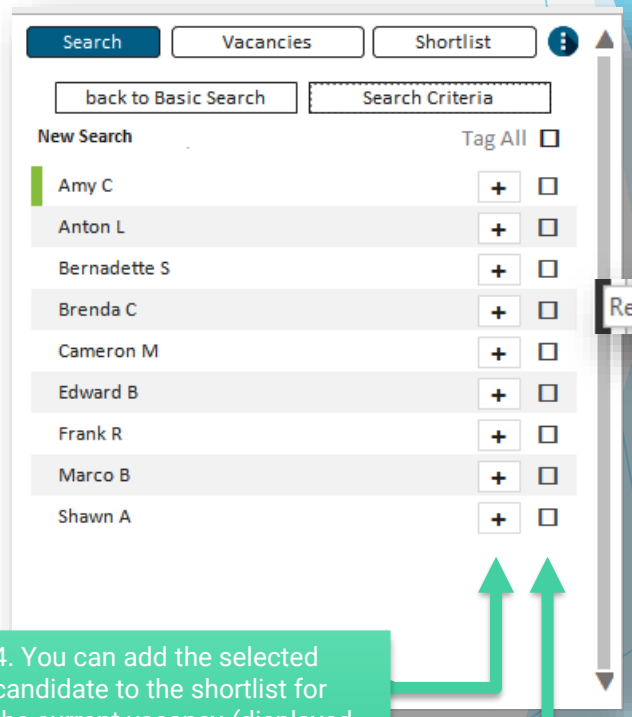
The candidate has been classified under Sales/Marketing

AND NOT (excluding)

The candidate has been classified as a Junior



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



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

Records 1 to 9 of 9

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

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intelligence Cheat Sheet: Searching from a Vacancy

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.

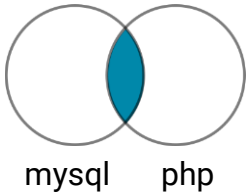
e.g. "mysql"

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

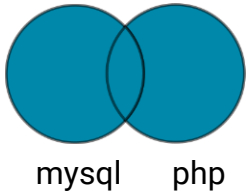
e.g. "mysql" AND "php"

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

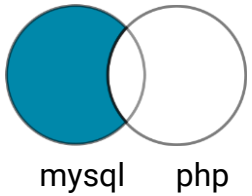
e.g. "mysql" AND ("php" OR "java") will provide results that are initially filtered to contain as least one of "php" or "java", and then further refined to include "mysql"



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"

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