Star rating: setting and searching

*The 'star rating' appears on all **client** and **candidate** records and allows users to nominate a rating of between 0 and 5 to indicate a relative rating such as quality.*
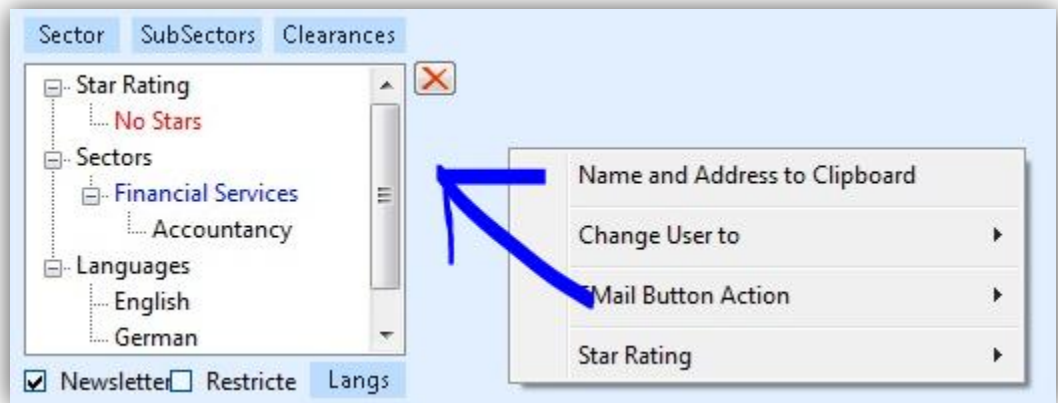
For instance, a particularly place-able candidate might be given 5 stars whereas a candidate who you know very little about may receive no stars.

You can use it as an overall indicator or use it for a specific area such as expertise or experience.
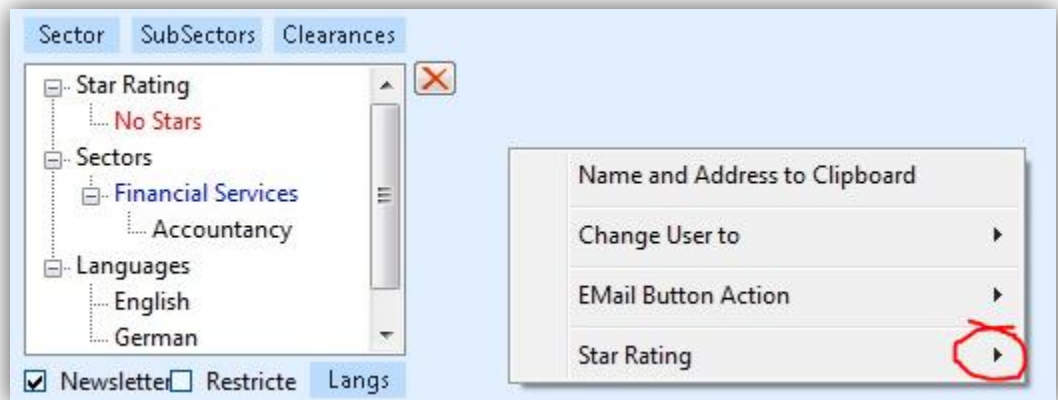
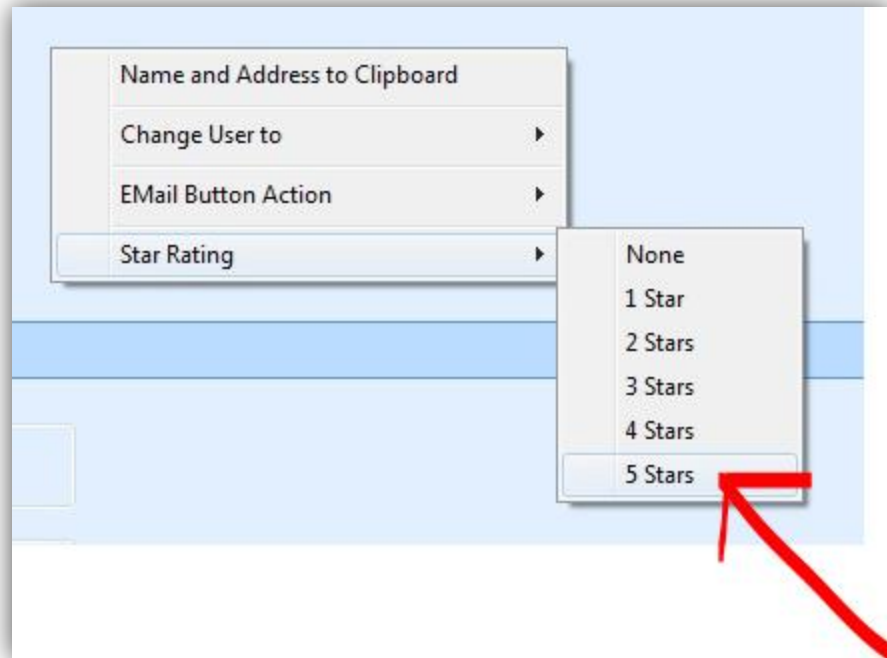## Setting the star rating

1. Open a candidate or client record.

2. Right click anywhere on the blank area in the contact details section at the top of the record.
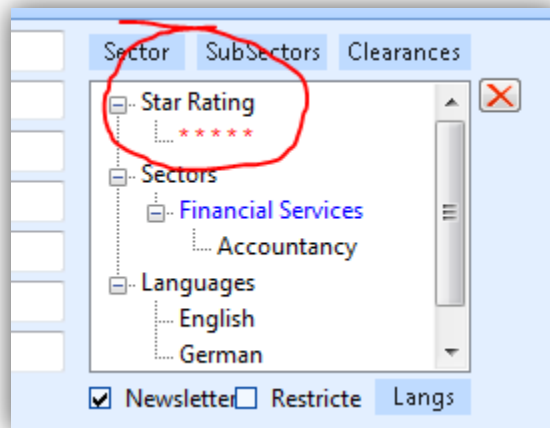

3. From the menu choose 'Star rating'...

4. Assign the appropriate number of stars.

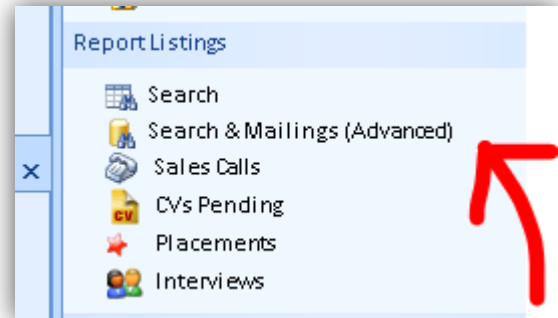5. The stars appear above the sector information.

When you close and save the record, the star rating for that record will be searchable.
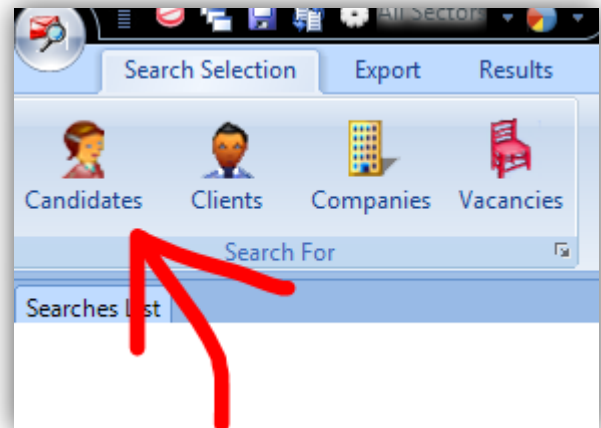
Searching by star rating

The star rating of a candidate or client can be incorporated into a search. You need to use 'Search & Mailings (Advanced)' to search this criteria.
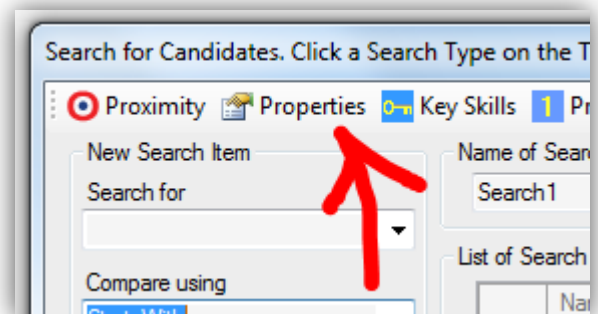
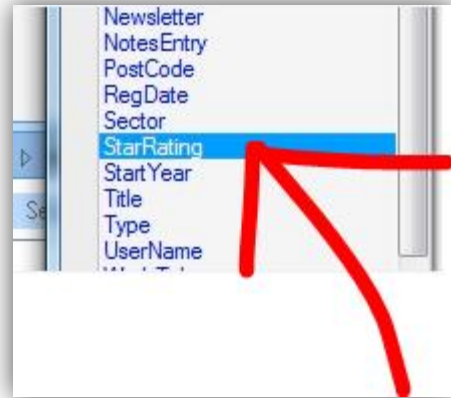1. Open 'Search & Mailings (Advanced)' from the Main Menu.

2. Choose to search either Clients or Candidates.

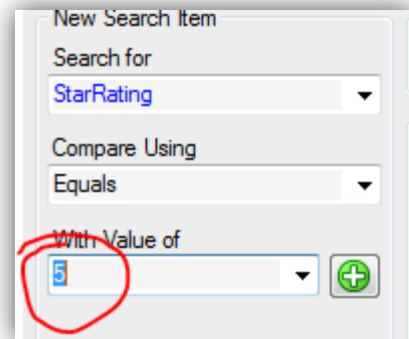
3. Choose the 'Properties' category.

4. Find 'Star rating' in the first pull down menu.

5. In the 'With value of' field type a number e.g. 5 and press Enter on your keyboard.

   The criteria will be added to the search, you can add more criteria if you wish.

   When you are ready, click 'Search'.

As shown above, Search & Mailings will expect you to type in a number to indicate the number of stars you wish clients or candidates to have. You can also include greater than and less than signs into your search criteria – you will find these on the 'Compare using' pull down.

For instance you could look for all candidates with 3 or more stars – so choose '>=' (greater than or equal to) and then type the number 3 as the value.

Note:

Greater than or equal to is indicated by '>='

Less than or equal to is indicated by '<='