

# How do I use the 'Search' function?

---

Effective searching is key to any database and to make it simpler we have introduced an easy-to-use search facility to work alongside Search & Mailings.

In this tutorial I am going to show you how to master these simple searches. The benefit of this new Search facility is that you can easily run a search outside Search & Mailings but then you get to use all the great features that Search & Mailings gives you when you have the results such as emailing, setting call backs and interviews and so on.

You'll find the new Search button on the Main Menu. You can see that Search & Mailings is still there too but we've renamed it Search & Mailings (Advanced) to clarify the difference.

So I click Search and a small window opens. You can search either candidates, clients, companies or vacancies but you can't mix them together. For instance you can't search for clients AND candidates at the same time. The types are listed as buttons along the top. Also along the top is a button for 'Specific Searches'. These are searches that we get asked about regularly such as how do I search for all my clients or for all clients in the database. This can be useful if you want to send a mailshot to all the clients or candidates in your database.

If I want to search for all my clients, I simply click 'My Clients' and the search runs immediately. The results open in Search & Mailings and you can use all the functions on the Results toolbar.

So that's really easy.

Let's now run a search for candidates – I'll use three criteria: a sector and a key skill and a location.

So firstly I need to click 'Candidates' and then I see a pull down menu. The menu contains the most popular search criteria. So I click 'Sector' and then immediately another pull down menu opens. This time it shows me the sectors available in the database. So I choose one.

Now if I only wanted to search for one criteria I would just click 'Search' now but I want to show you how to add another couple of criteria.

So the next criteria I want to add is a key skill. The question is how do I want to add it? Do I want to use an 'AND' or an 'OR'. This choice is usually determined by whatever it is you're searching for. Right now I'm searching for a sector with a key skill so it makes sense that I use 'AND'. In fact, 'AND' is the default choice which you can see because it is already selected.

So I now add in my key skill criteria. I firstly choose 'Key skill' from the menu and then I am presented with a list of key skills in the database. So I choose one.

Now for my final criteria I am going to choose a location. Again, I want to use 'AND' in between the key skill and location and as this is already set I can go to the last row of the search and choose 'Location' and then choose a location already contained within the database.

Finally before I click 'Search' there is a tick box on the screen called 'Save search'. This tells Search & Mailings that you want to save this search for future use. It saves the search criteria in Search & Mailings so you can run it from there at any time in the future without having to rebuild it.

So I click 'Search' and the results appear in Search & Mailings. As you can see all the features are enabled so I can change the visible columns, I can create call backs, arrange interviews and of course send mailshots. I think this is a really nice search facility because it simplifies the whole task of sending mailshots because the search is so easy to build.

On the left of the screen you can see the search listed – it's called 'SearchX'. I asked Recruit Studio to save the search for future use so what would be useful is to rename this search to something more recognisable. And I do that by double clicking on the 'SearchX' title. Then I simply replace the name with a better one. When I click 'Search' again it will save the name and remain in the list for the future.

One other useful tool within Search is that you can now incorporate a CV search. If I choose to search Candidates I can then choose 'CV text' from the pull down list. Then I can type in whatever text I want to find. Like the usual CV search it's a free text search so it will find any matches of the word or phrase that you type in. It is slightly different to a CV search in that it's only searching through the CVs of registered candidates. So it won't search CVs that are not attached to a candidate record.

If you think the new Search function could help you I suggest that you take a closer look at the criteria that it's possible to search. Each category (so candidates, clients, companies and vacancies) contains different criteria and it's useful to know what is possible. Of course if a criteria doesn't appear in this search, it will be included in Search & Mailings instead.