

WinSearch Tips & Tricks for Persons & Searches

Overview

This covers more advanced persons and searches WinSearch features than you might use in your initial day-to-day usage. As such, there isn't an overall focus but rather tips in various areas that may make your WinSearch usage more productive.

General


- Table windows can be sorted. Use Menu command to sort by more than one entry.
- Change column settings
- **Alt**+**1** - Cycle through WinSearch windows
- QBE – Or in the same entry
- Doing a lot of changes? How you arrange columns in a table window makes a big difference. For updates en masse: Do a search or QBE to identify records to change. Set first column to be the entry to change and make sure that the 2nd column does not have a drop down.

People

Find People

- F3 works from many locations – even when you cannot see the Lookup Any Person toolbar button.
- F3/Lookup Any Person also works for email addresses or parts of an email address
- To find people with mucked up names, consider doing a QBE of <A
- Find by phone number – From main WinSearch window, select Persons | Lookup By Telephone Number. From persons form/table window – choose Query | Telephone Number.
- Merging duplicates
- List those whose Salutation is different than their first name

Adding a person to a company of the person you are at

- Right-click the company name
- Click the New Person toolbar button ()

Adding a person by pasting their email signature

- Click the New Person From Clipboard toolbar button ()

Miscellaneous

- DNU – Remove all Key Words, can block email
- Education? Consider Key Words
- International Phone numbers +1 Country code & Number

Searches

Searches on Job Titles? Don't forget the %

- When searching for a job title, make sure to use Current Title, not Job Title. Difference – where they are now vs. where they were before.
- Use % at the beginning and ending of the entry with no extra spaces. For instance, %Manager% will match Sales Manager and Manager of Sales as well as just Manager.

Searches on Email Addresses

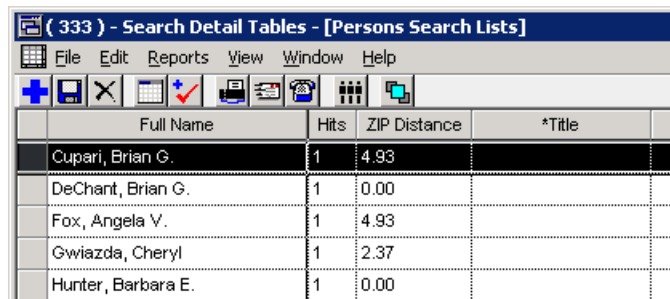
- Use % to find people with ANY email address. Use this to focus a list for email blasts or to separate those whom you are making an initial contact by email vs. phone.
- WinSearch will let you email thousands at a time. Don't. Go for batches of 200 or less. Getting spammed often takes a week of concerted effort to get unspammed. During that time, none of your emails go through.

Counts

- Indicates how many had a specific criterion. Executing the search finds people whom match all required criteria.

Searches on Zip Code Distance

- Based on Home Address
- Works on Canadian postal codes too
- Type number of miles then zip code as in 10 44101 or 10/44101
- Results include a Zip Distance set of entries measuring the distance



Full Name	Hits	ZIP Distance	*Title
Cupari, Brian G.	1	4.93	
DeChant, Brian G.	1	0.00	
Fox, Angela V.	1	4.93	
Gwiazda, Cheryl	1	2.37	
Hunter, Barbara E.	1	0.00	

Key Word Weighting

- Can add the same key word twice – once to find people whom have that key word at all and a second time to prioritize those whom have it more.

Req * Key Words - Root = ACCOUNTING
 Req * Key Words - Root = ACCOUNTING >= 2

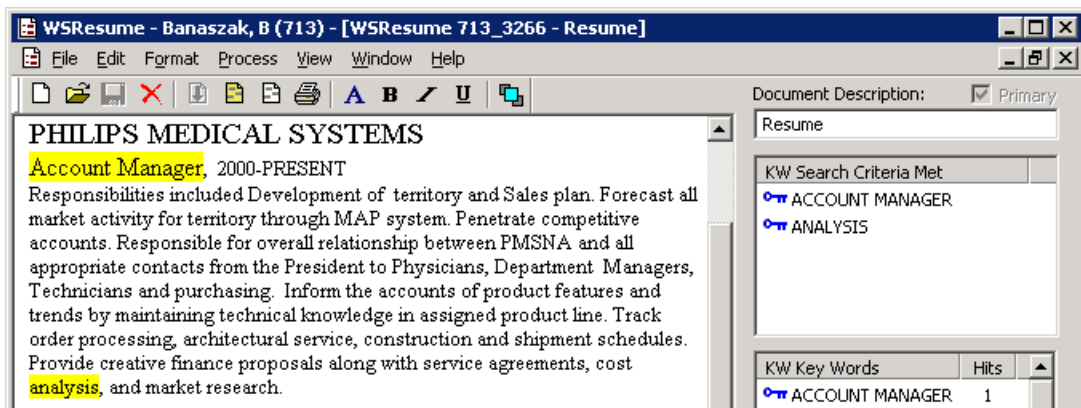
Search Results

Hits and Required vs. Desired

Visit the bottom of the list if it is long

Highlighted Key Words

- Check out the highlighted key words for search criteria



Map an address

- From Person's form/table window, use the Edit | Map Mailing Address and choose the address to map.

Next Contact toolbar button

- Highlight all activities in the job order activity window and create an activity to set up phone call activities for another job order with all the same candidates.

Dump to Saved List

Saved Lists

- Merge Searches
- Hot Candidates
- Doing Queries within List
- People whose primary email is not blocked
 Query criteria is: id in (select id from emailaddresses where bulkemailrestrict=0 and emailtype=0)