

WinSearch 101

General Navigation

Menus and Icons

- 5 main areas of WinSearch:
 - *People, Company, Job Order, Search & Calendar*
- Run-through of Icons & usage
- Application Toolbar

Looking up Records

- Tips and tricks for looking up People in the database
- Display options & Form vs. Table view

WinSearch Tools in MS Outlook & MSWord

Resume Processing

- Using lightning bolt icons to process resumes
- What happens when a resume is processed?
 - Name & Contact info
 - Key Words
 - WS Resume
 - Word Document

Word Features

- Overview of Toolbar
- Creating Duplicate Documents
- Adding a Logo to a Resume

Adding Additional Documents

- Using the paperclip tool
- Processing options
- Renaming additional files

Looking up Records in WinSearch

- Using the lookup tool to quickly find records in WinSearch
- Discussion of Flagging and Flag colors

Creating Linked Records

Creating a new Contact

- Person's Category and importance of Category in WinSearch
- Duplicate name checking
- Adding a Company Record using Quick Add
- Different fields in a Persons Form

Creating Company Records

- Fields and Address information
- Adding a website UDF
- Location of company contacts

Linking Contacts to Records

- Create a contact from a Company Record
- Review location of company contacts
- Right click on company name to quickly jump to company record