

WinSearch Tips & Tricks Part 2

Overview

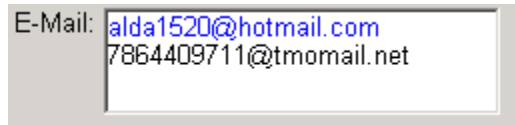
This covers more advanced WinSearch features than you might use in your initial day-to-day usage. As such, there isn't an overall focus but rather tips in various areas that may make your WinSearch usage more productive.

Email

- View the document with your logo on your phone
- Consider displaying list with firstname & salutation and glance through for typos

Send Text Messages to Cell Phones from WinSearch

- Give the person an email address of their cell number followed by their carrier (see table below). This does mean that you need to know which carrier they use. Here is an example of a person's email box where the second entry is a T-Mobile cell number.




Carrier	Entry after Phone Number
Alltel	@message.alltel.com
AT&T	@txt.att.net
Nextel	@messaging.nextel.com
Sprint	@messaging.sprintpcs.com
SunCom	@tms.suncom.com
T-mobile	@tmomail.net
VoiceStream	@voicestream.net
Verizon (text only)	@vtext.com
Verizon (pictures and videos)	@vzwpix.com

Blast HTML Emails

- Separate training video for this topic

Blind Resumes

- Open the candidate's resume.
- Click the Duplicate This Document toolbar button (). Now, you are looking at a copy of the original.
- Replace their name with their WinSearch ID number. Their ID number is the first number that appears in the filename that appears in Word's title bar.
- Select File | Info Prepare for Sharing | Check for Issues | Inspect Document.
- Click Inspect then choose Remove All as appropriate.

- Save and close the document.
- Go to the persons Documents Detail Table and change the description of the document
- Choose Settings | User Options | General Settings.
- Choose the Use File Description as Attachment Name and choose OK.
- Email the resume as you normally would, making sure to attach the blind resume to the email.
- Choose Settings | User Options | General Settings again.
- Choose the Use Person's Name as Attachment Name and choose OK.

Saved List to Exclude No Bulk Emails

- Set up Memorized Query with This Criteria:
id in (select id from emailaddresses where bulkemailrestrict=1)

Standard Documents

- Set up with Settings | User Options | Std Fax & Email Documents command.

Activities

Breakdown Graph

- Daily Planner or Activity Table
- Graph is created faster using < in the upper left corner of the Daily Planner table.
- Visit bottom of the table for faster graph generation

Activity Links

Use Email Distribution Groups for Activity Alerts

- Sysadm chooses who gets emails when certain types of emails are created. If you have a list of people, set up a distribution group and then use that distribution group's email address for WinSearch.

Job Orders

- Start JO from Hiring Manager
- Hiring manager for a job order from a different company
- Paste description in job order and get key words then search.

Set Up Activities for Candidates from a previous job order:

- Open Job Order Activities.
- Highlight all activities.
- Create an activity
- Select Save as Individual ... then Save

SYSADM Stuff

Make background color different than regular login

- Color set with Settings | Display Options | Colors


Don't make a Password Password or contain the word Password

Adjust Drop-down box contents


- Move to Drop-down and press F2
- Make additions, deletions and changes to resulting table. Some tables must be modified as SYSADM.
- Close table window when you are done.

WinSearch and Outlook


Binoculars in Outlook

- At an email or contact, click the binoculars button () , any email address in the email or contact that matches people in WinSearch are retrieved.

Create WinSearch Activities from Outlook



- Highlight email or contact and click Create Activity from Selected Item ()
- Includes as activity links those people whose email matches the selected email or contact.
- Record emails you sent from your phone.

Retroactively Log Emails

- Put the emails in their own folder
- Choose Process Emails in Selected Folder ()

Word

Turn off Protected View in Word

- File | Options | Trust Center | Trust Center Settings | Protected View and clear the 1st and 3rd check boxes.
- Duplicate Document with this toolbar button: 
- Update Address with this toolbar button: 

Adding WinSearch Add-In to Quick Access Bar

- Click on the arrow at the end of the Quick Access bar. The Quick Access bar may be above or below the ribbon and/or menu bar so it may have an appearance like any one of these.
- Choose More Commands from the popup menu to display the window for adjusting the Quick Access Toolbar

- Choose Add-Ins Tab from the Choose Commands From drop-down list.
- Highlight Custom Toolbars in the list and click the Add > > button to move it to the right.
- Choose OK.

Windows in General

Adding WinSearch, Word and Outlook to the Task Bar

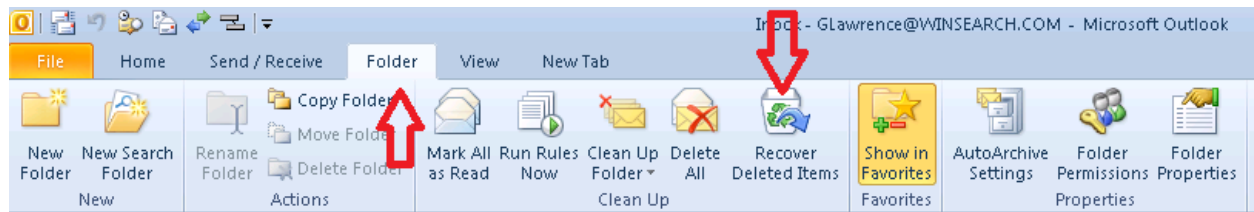
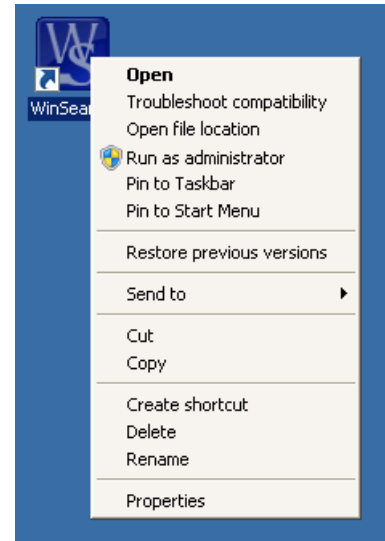
- Right-click desktop icon or menu item in Start menu and choose Send To Task Bar

Turning off the Adobe side panel

- Must have July 2015 update.
- Select Edit | Preferences and go to the Documents tab. Clear the Open Tool Pane for each document.

Retrieve deleted email

- Switch to Folder in the menu bar
- Choose Recover Deleted Items



- Highlight item(s) to restore
- Click Recover Selected Items



Connections via Tablet and Phone