Activity Search

Calendar & Activities · https://learning.pcrecruiter.net/site/docs/activities/record-and-pipeline-activity-search/

Here, you'll find step-by-step instructions for searching various types of activities in PCRecruiter. Whether you're looking for activities related to people, companies, positions, or pipeline, these instructions will help you streamline your search and get the results you need. Learn how to create activities here.

Name Activity Search

Use Names Activities Search to find activities associated with Name records within a specified timeframe.

1. Click Activities on the main toolbar.
2. Click the Name icon.
3. Enter Activity created Date Range.
4. Select the number of records per page.
5. Select the Order By (sort preference).
6. In Text Search, you can filter by the text written to the Activity Text area.
7. Select Additional Filters (OPTIONAL). Separate multiple values with a comma.
    - Filter by Company Name
    - Filter by User Name
    - Filter by Activity Type
    - Filter by Rollup List
    - Filter by Last Name
    - Filter by First Name
    - Filter by Position Id (Returns all activities for names in the pipeline for selected position)

- Select Activity Types to be excluded

8. Click the Search action icon. Once you return the activities, you can print results, rollup the names into a list, or bulk email the names.

Company Activity Search

Use Company Activities to find activities associated with Company records during a specified timeframe. Learn how to write activities here.

1. Click Activities on the main toolbar.
2. Click the Company icon.
3. Enter Activity created Date Range.
4. Select the number of records per page.
5. Select the Order By (sort preference).
6. In the Text Search, you can filter by the text written to the Activity Text area.
7. Select Additional Filters (OPTIONAL). Separate multiple values with a comma.
   - Filter by Company Name
   - Filter by User Name
   - Filter by Activity Type
   - Filter by Rollup
   - Select Activity Types to be excluded
8. Click the Search action icon. Once you return the activities, you can print results or rollup the companies into a list.

Position Activity Search

Use Position Activities to find activities associated with Position records within a specified timeframe. Learn how to write activities here.

1. Click Activities on the main toolbar.
2. Click the Position icon.

3. Enter Activity created Date Range.
4. Select the number of records per page.
5. Select the Order By (sort preference).
6. In the Text Search, you can filter by the text written to the Activity Text area.
7. Select Additional Filters (OPTIONAL). Separate multiple values with a comma.
    - Filter by Job Title
    - Filter by Company Name
    - Filter by Position Id
    - Filter by Department
    - Filter by Activity Type
    - Filter by User Name
    - Filter by Rollup List
    - Select Activity Types to be excluded
8. Click the Search action icon. Once you return the activities, you can print results or rollup the positions into a list.

Pipeline/Interview Search

Use Interview Activities to find Pipeline records created within a specified timeframe. Not sure how to create pipeline records? Click here to learn more.

1. Click Activities on the main toolbar.
2. Click the Interview icon.
3. Enter the Date Range, then use the Order By to specify to base the results on Appointment/Start/Begin Date, or the Arranged/Placed Date.
4. Select Additional Filters (OPTIONAL)
    - Filter by Company Name
    - Filter by User Name
    - Filter by Position Id
    - Filter by Job Title

- Filter by Department
- Filter by Last Name (Candidate)
- Filter by Interview Type/Status (Pipeline Template/Step)

5. Click the Search action icon. Once you return the interview records, you can print results, rollup the candidates into a list, or bulk email the candidates.