

Chapter 5

Use the Find Screen

5-1. General.

a. The Find screen is an easy and quick tool to navigate in your leads database. For example, the Find screen is helpful in organizing your schedule. It will show your current and past appointments, search for specific records, and locate specific groups of records that you may want to contact that day. This will get you comfortable with using the Find screen to increase your productivity.

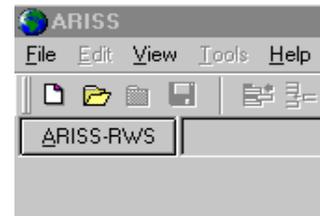
b. The following steps will show how to use the Find screen.

- (1) Open the Find screen.
- (2) Understand the information provided.
- (3) Set search parameters.
- (4) Open a record.

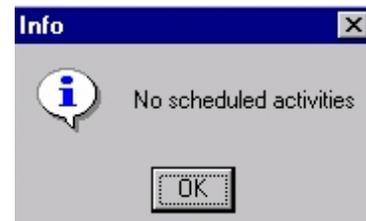
5-2. Open the Find screen.



a. Knowing how to use the Find screen will help you quickly locate specific records, groups of records, and manage your daily appointments and activities. Click **Open** under the **File** menu or just click on the **Open Folder** icon on the toolbar.

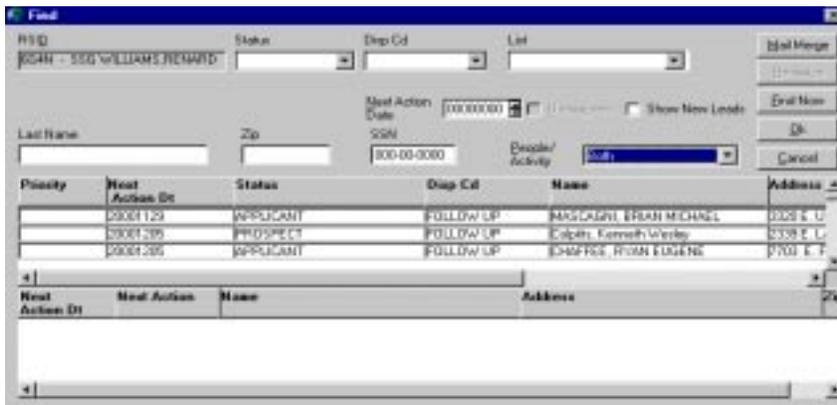


b. If there are no scheduled activities, this message box will open. Scheduled activities can include any activity scheduled with your assigned schools. Click **OK**.



5-3. Understand the information provided.

a. Once the **Find** screen appears it will display all records that have a **Next Action Date** of today or of a previous date. This screen will not display all records that are currently assigned to you. If you are aggressively working your records, this will display your appointments or actions that you need to complete today.



b. Let's review the **Find** screen for a few moments to ensure you understand its capabilities. This screen will allow you to find any record or group of records that you are looking for. Understanding how to use this screen will allow you to quickly find the records that you need to work. If there is a drop-down arrow in the field, there are items provided for you to select. This is not a free text field. If there is no drop-down arrow, then this is

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a free text field. The column headers will allow you to sort the records by the column, either in ascending or descending order; however, if there is a blank field in that column, it will always show at the beginning. To look at all records that are assigned to you, click on **Find Now**.

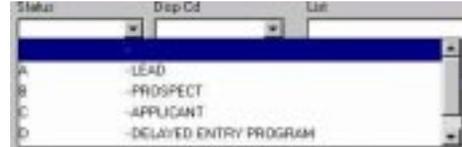
Find Now

5-4. Set search parameters.



The screenshot shows a window titled "People/Activity". On the left, there is a label "Name" and a text input field. To the right, there is a dropdown menu currently set to "Both". The dropdown menu is open, showing three options: "Activity", "Both", and "People". The "People" option is highlighted in blue.

a. The **People/Activity** window will display people and activities that are scheduled, if **Both** is showing in the display window. If you are looking for people only and are not looking for any activities, you can show more records by selecting **People** from the **People/Activity** window. If you select **Activity**, it will only display your scheduled activities for your assigned schools. Make your selection and click **Find Now** to display your records. Now you can begin to locate records by using **Status**. Click the **Status** window drop-down arrow. Let's take a look at the options you can select for Status. Using the applicant's status to narrow down your search is a very efficient way to locate specific records. Look at the different status choices available for you to select. Once you determine what status of records you want to search for, select that status and click **Find Now** to start the search. All records meeting the criteria that you selected will be displayed.

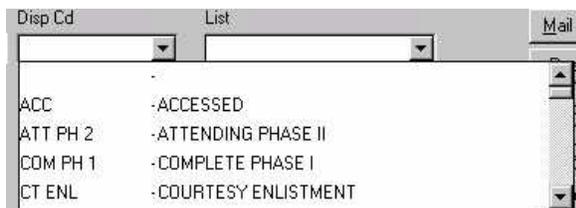


The screenshot shows a window titled "Status". It has a dropdown menu currently set to a blank line. The dropdown menu is open, showing four options: "-LEAD", "-PROSPECT", "-APPLICANT", and "-DELAYED ENTRY PROGRAM".

✓ Remember that performing Status searches is a quick and effective way of finding records. In fact, searching by Status, Disp Cd, or List will provide you with the fastest results.

b. Now if you want to use only the **Disp Cd** to search, you must make sure you clear the **Status** window first. Begin by clicking the **Status** window drop-down arrow. Now click the first selection, which is a blank line.

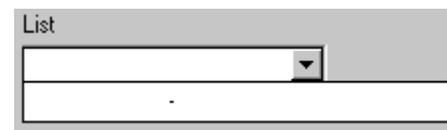
✓ Remember this process applies whenever you want to change any of your search parameters.



The screenshot shows a window titled "Disp Cd". It has a dropdown menu currently set to a blank line. The dropdown menu is open, showing four options: "ACC", "ATT PH 2", "COM PH 1", and "CT ENL".

c. Now that you've cleared the **Status** window, you may begin a search by Disposition Code. Start by clicking the **Disp Cd** drop-down arrow. Take a look at the options you have under the **Disp Cd** menu. Click the **Disp Cd** scroll bar down arrow. Once you have determined what disposition code that you want to search by, click **Find Now** to get the results of your query. To clear your search on disposition codes, click the **Disp Cd** drop-down arrow and click the first selection, which is a blank line.

d. You may use the **Find** screen **List** parameter to search lists that you made and stored as a **Create List**. If you have not created or saved a **Create List**, we will discuss this in another chapter. If you have saved a **Create List** it will be displayed in the drop-down window.



The screenshot shows a window titled "List". It has a dropdown menu currently set to a blank line.

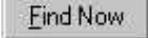


The screenshot shows a window titled "Next Action Date". It has three input fields: "Last Name", "Zip", and "SSN". The "SSN" field has a value of "000-00-0000". There is also a "Peop Activ" label next to the SSN field.

e. You can also search by the **Next Action Date**. This can help you organize your schedule in advance. If you're looking for a specific individual, you can type the last name or a portion of the last name into the **Last Name** window to display that specific name or all names that start with the letters that you entered. Or suppose you need to search for all the individuals in a specific ZIP Code area, you can put any portion of the

ZIP Code in the **Zip** window. You can also search by an individual's social security number (SSN).

f. To find records using multiple parameters enter your criteria from the different drop-down arrows and click **Find Now**. For example, if you want to find all records with a **Status** of **APPLICANT** and a **Disp Cd** of **FOLLOW UP**. To find these records click the **Status** window drop-down arrow and click on **PROSPECT**. Now you'll select a second parameter. Click the **Disp Cd** drop-down arrow and select **FOLLOW UP**. You will need to scroll down the disposition code menu to find follow up. Take a few minutes and review all of the disposition codes that you can use.

g. Now click **Find Now**. 

h. Your query results will be displayed. Remember that clicking on the column headers will sort the records in ascending or descending order.

| Priority | Next Action Dt | Status | Disp Cd | Name | Address |
|----------|----------------|-----------|-----------|-----------------------------|--------------|
| | 20010308 | APPLICANT | FOLLOW UP | AMUNDSON, MEGAN RAE | 175 W. O... |
| | 20010119 | APPLICANT | FOLLOW UP | BEVIER, ADAM HASBROUCK | 4351 E. E... |
| | 20001218 | APPLICANT | FOLLOW UP | CARSON, LARRY NEAL | 1233 N. M... |
| | 20001205 | APPLICANT | FOLLOW UP | CHAFFEE, RYAN EUGENE | 7703 E. F... |
| | | APPLICANT | FOLLOW UP | CLARK, NATHAN DUANE | 3320 E. U... |
| | 20001207 | APPLICANT | FOLLOW UP | COLPITTS, KENNETH WESLEY | 2339 E. L... |
| | 20010313 | APPLICANT | FOLLOW UP | CORTEZ, PAUL ANTHONY | 1951 E. T... |
| | | APPLICANT | FOLLOW UP | DAVID, SHEADEN OURAM | 806 NOR... |
| | 20010310 | APPLICANT | FOLLOW UP | DAVIS, CHRISTOPHER COLUMBUS | 2007 N. H... |
| | 20010104 | APPLICANT | FOLLOW UP | DELGADO, DOMINICK PLACIDO | 4505 E. C... |

i. Take some time and enter different parameters in the search fields to display your records. The more familiar you are with the **Find** screen, the quicker you will find the records that you are looking for.

j. One of the new features of the **Find** screen is the check box to find new leads. Check the **Show New Leads** and then click **Find Now** to display any new leads that you have received since your last replication. These records will only show until your next replication. Check this routinely to find those new leads.

5-5. Open a record.

a. If you want to work a record, click on the record once to highlight that record and then click **Ok**. It will bring you to either the **Lead** screen or **Prospect** screen depending on the status of the record you are working.

| Priority | Next Action Dt | Status | Disp Cd | Name | Address |
|----------|----------------|-----------|-----------|------------------------|--------------|
| | 20010308 | APPLICANT | FOLLOW UP | AMUNDSON, MEGAN RAE | 175 W. O... |
| | 20010119 | APPLICANT | FOLLOW UP | BEVIER, ADAM HASBROUCK | 4351 E. E... |

b. If you just need to exit the **Find** screen, there are two ways. The first is by clicking the **Close** button or you can close the **Find** screen by clicking the **Cancel** button. 

c. One item that we did not discuss is the **Mail Merge** function on the **Find** screen. This will be discussed in chapter 18. You will also notice that there are two items that are grayed out, the **Unassigned** box and the **Reassign** button. These are only available for your SC.

d. When you close the **Find** screen you'll be returned to the ARISS-RWS Leads-Reports main screen.