

# How to Search Records (Basic)

The screenshot displays the PORTERS HR-Business Cloud interface. At the top, the logo 'PORTERS HR-Business Cloud' is visible. Below it, a navigation bar includes 'Client', 'Recruiter', 'Job', 'Person', 'Resume', 'Sales', 'Process', and 'Activity'. A search bar is highlighted with a blue box, and a dropdown menu is open, listing options such as 'Saved Search', 'All Client', 'My Client', 'Recently Accessed', 'Sample Client 02', 'Sample Client 01', 'Import', 'Import Client', and 'Import Contract'. A green callout box with an arrow pointing to the 'Search' option in the dropdown contains the text: 'Click "Search" which can be found under each item in the global menu.' The background shows a calendar view for June 15-21, 2017, with a 'Week' view selected. On the right side, there are sections for 'Information' (with a 'Refresh' button and a 'See More...' link), 'Helpdesk' (with contact information for phone, email, manual, and training), and 'Upgrade plan or request additional services' (with a sales representative contact number).

- ※ There is a possibility that the screen image might change.
- ※ In this manual, the default menus displayed are the default settings.  
To change the global menu display settings, please refer to the document "How to Customize the Global Menu".

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Client Recruiter

## Client List

### Client List Search Criteria

Saved Search -

Sort Order Updated Date(Desc)

Keyword Contains All (AND)

Keyword Search Mode  All  Attachment  Data

Client ID

Client Name Contains All (AND)

Client Owner

Zip Code (Client) Contains All (AND)

Phone (Client) Contains All (AND)

Fax (Client) Contains All (AND)

Phase Contains Any (OR)  
 Contact  Negotiated

Phase Date -

Date Created -

Date Updated -

Search

Cancel

Customize View

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[New Saved Search](#)  
[Delete Saved Search](#)  
[Sort Order for Saved Searches](#)

Select or fill in blanks of fields that you wish to search

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Client Recruiter

### Client List

#### Client List Search Criteria

Saved Search -

Sort Order Updated Date(Desc)

Keyword Contains All (AND)

Keyword Search Mode  All  Attachment  Data

Client ID

Client Name Contains All (AND) porters

Client Owner

Zip Code (Client) Contains All (AND)

Phone (Client) Contains All (AND)

Fax (Client)

Phase

Phase Date

Date Created

Date Updated -

**Search**

Cancel

Press the "Enter" key or click "Search".

[New Saved Search](#)  
[Delete Saved Search](#)  
[Sort Order for Saved Searches](#)

Customize View

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Client Recruiter Job Person Resume Sales Process Activity

### Client List (2)

Add New Client Bulk Action Customize View

Contact(0) Negotiation(0)  Success For Sale(2) Lost(0)

<input type="checkbox"/> Sample Client 01	Client Name	Sample Client 01	Phase	Success For Sale
	Address (Client)	Sample Ad	Start Date	2014/05/16 00:00:00
	Client Owner	N/A Cather		
	Memo	Sample Me		
<a href="#">Sublist</a>				
<input type="checkbox"/> Sample Client 02	Client Name	Sample Cli	Phase	Success For Sale
	Address (Client)	Sample Ad	Start Date	2014/05/16 00:00:00
	Client Owner	N/A Catherin		
	Memo	Sample Memo		
<a href="#">Sublist</a>				

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The search results are displayed.