

How to Get the Most Out of ReferenceEdge's New Search

Searching for advocates and advocate content isn't always black-and-white. Sometimes you need an exact match... sometimes you're simply looking for "close enough." The updated search gives you both. Here's how to make it work for you:

1 Start with what matters most

Begin by choosing your most important criteria first.

Tip: When searching for accounts, always start with Referenceability Type. Then add other filters in order of importance—products, industry, geography, etc.

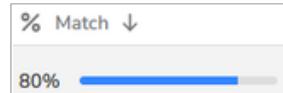
2 Review ranked results by Match %

Your initial results will show all records that match at least one of your chosen filters.

They'll be sorted by Match %—how much of your selected criteria each record contains.

- Higher % = closer match
- Lower % = fewer criteria found

Click the match bar for a specific result to see what's included and what's missing. This helps you quickly judge whether a result is a good fit.



3 Lock in your must-haves

Some criteria aren't flexible. When one value (or more) within a filter is a must-have, change its logic from **Match**:

- **Any** (default—flexible)
to
- **All** (strict—must match every selected value)

Product (28) Match: All Any

Records missing your must-haves are excluded from results.

Tip: Limit the number of must-haves. It's easy to get to zero results looking for unicorns.

4 If results shrink too much, loosen the filter

If results become too limited—or disappear—the fix is simple:

1. Decide which criteria matter less.
2. Switch those filters back to Any.
3. Instantly expand your options.

You're in control

Whether you need the perfect profile or a shortlist to explore, the new search delivers:

- Fewer zero-result dead ends
- Clear visibility into "near" matches
- Faster, more informed decision-making
- Confidence that you aren't missing great candidates

Start with what matters most, adjust as you go, and let Match % guide you to the right advocate every time.