JOB SEEKER'S CRM

USER MANUAL

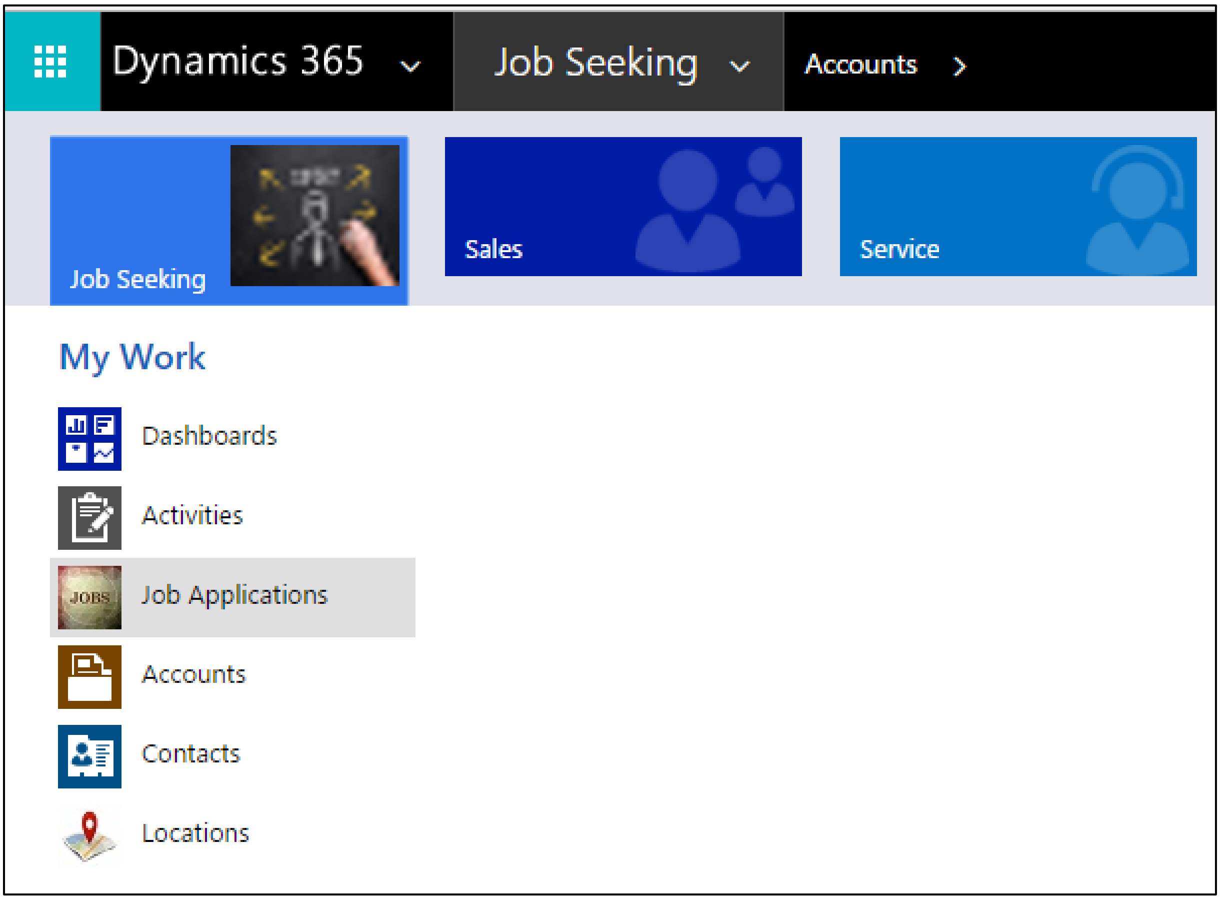
Mehmet Nuri Can
mehmetn.can@gmail.com
mnccrmconsulting.com

Introduction

Job Seeker's CRM includes the following entities.

- Accounts
- Contacts
- Job Applications
- Activities

An area which includes the components of Job Seeker's CRM has been added to the site map.



You can find the details of each entity below.

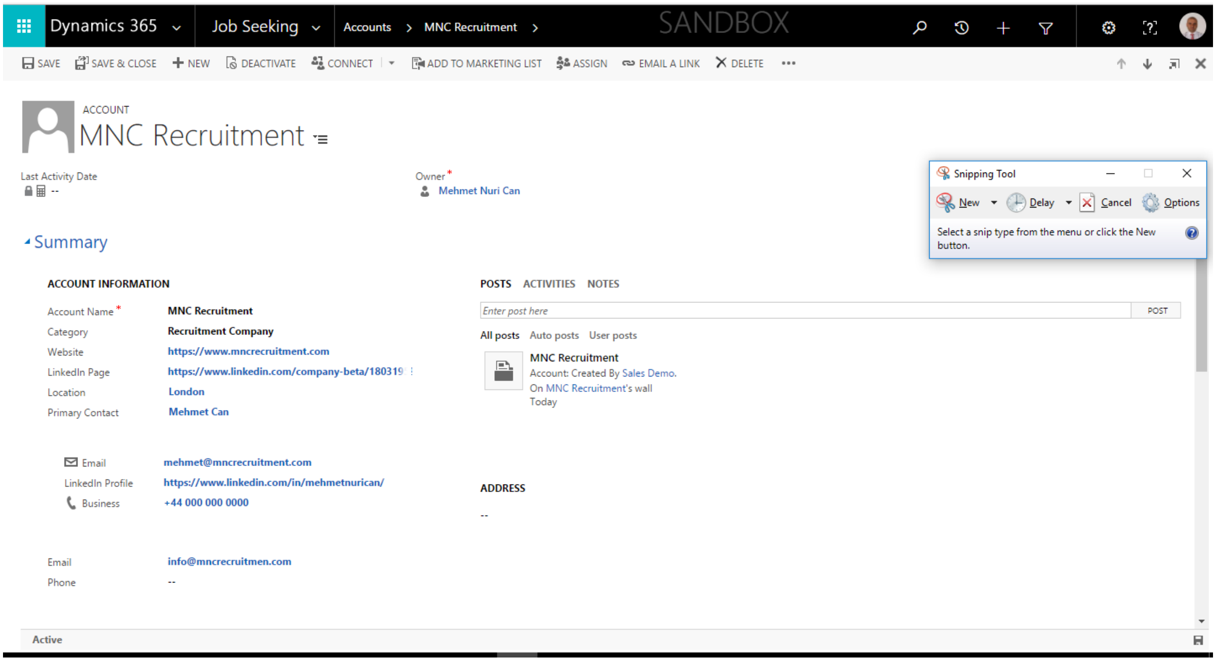
Accounts

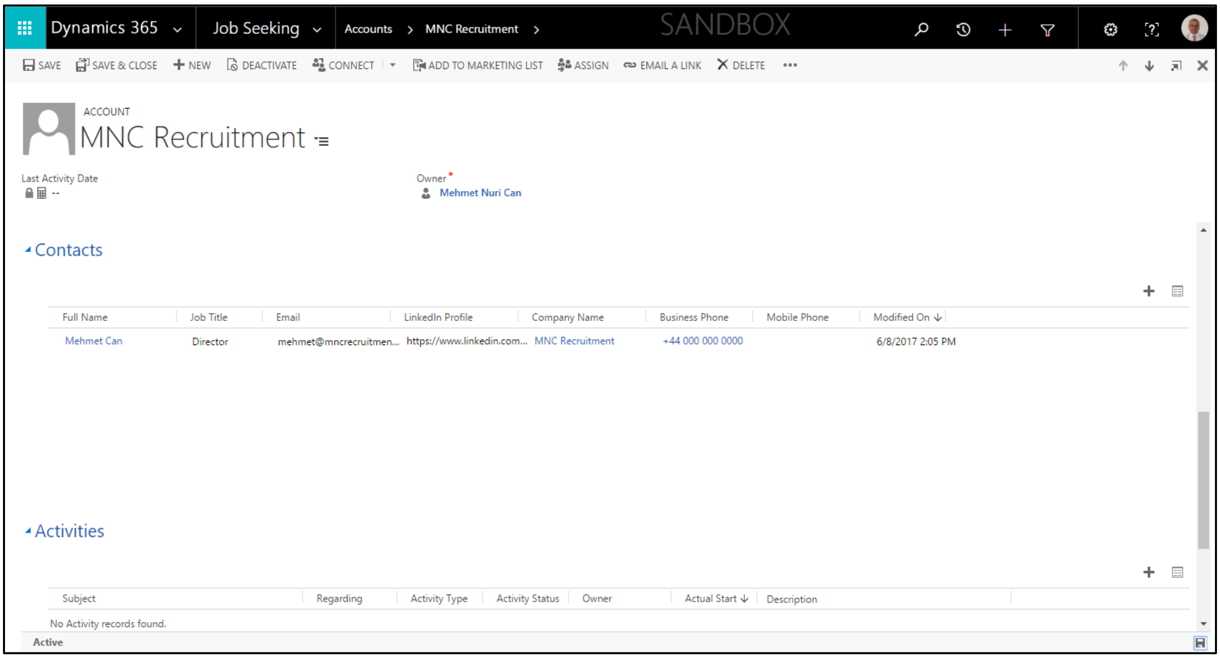
Account entity is used for tracking different kinds of companies. There are 3 categories;

- Recruitment Company
- Partner
- End Client

Form

The screenshots of an Account form is shown below.





Fields

Account form includes the fields below.

- Account Name
- Category: The type of the account. The values are "Recruitment Company", "Partner", "End Client" and "Other".
- Website
- LinkedIn Page: The URL of the LinkedIn page of the account.
- Location: The primary location of the account.
- Primary Contact: If the primary contact of the account does not exist in your CRM system, you can easily create a new contact by selecting "New" button. A quick create form will appear.

You can see Email, LinkedIn Profile and Business Phone values of the primary contact on the account form.

- Email
- Phone
- Description

The header section of an Account form includes the following fields.

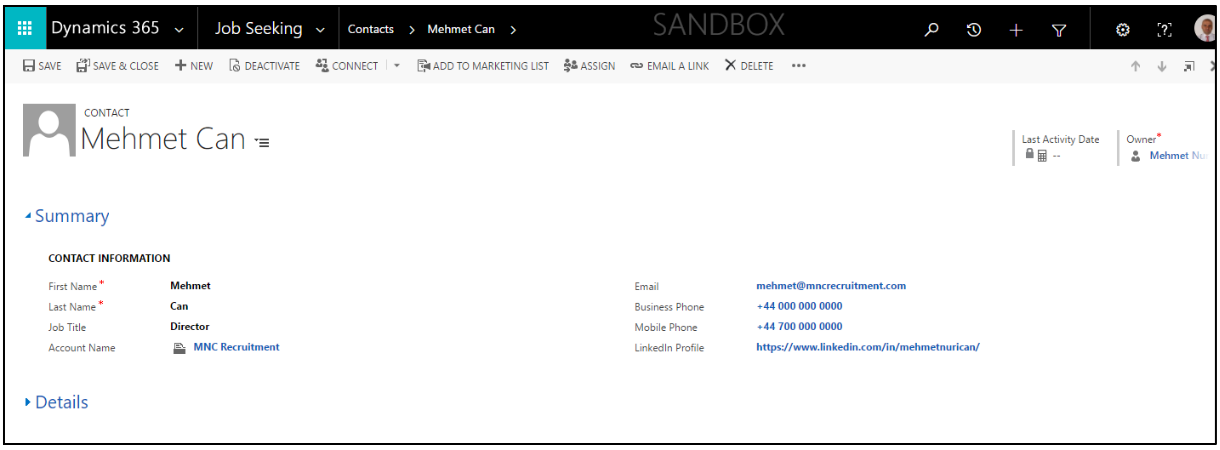
- Last Activity Date: This a calculated field which shows the date of the last activity regarding to the account.
- Owner: The owner will be populated as the user who create the record. It is possible to update this field.

Contacts

Recruiters, or employees of partners and end clients are recorded in the Contact entity.

Form

The screenshot of a Contact form is given below.



Fields

Contact form includes the fields below.

- First Name
- Last Name
- Job Title
- Account Name
- Email
- Business Phone
- Mobile Phone
- LinkedIn Profile

There are some additional fields on the Details tab. They are not very critical for a job seeker, but you can also fill those fields.

The header section of a Contact form includes the following fields.

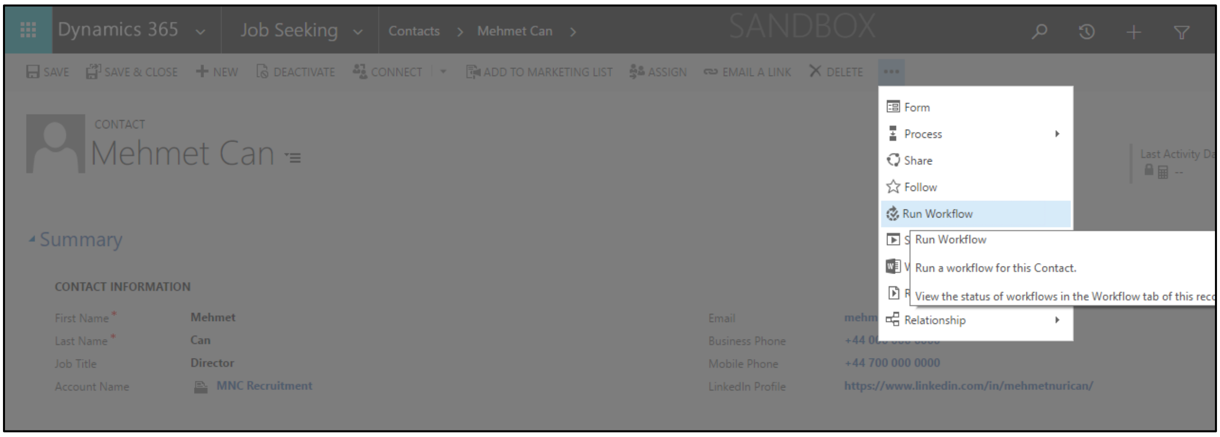
- Last Activity Date: This a calculated field which shows the date of the last activity regarding to the contact.
- Owner: The owner will be populated as the user who create the record. It is possible to update this field.

Workflows

There are 6 on-demand workflows in order to create an activity practically. They are;

- Create an Incoming E-mail (Letter)
- Create an Incoming LinkedIn Message (Letter)
- Create an Incoming Phone Call
- Create an Outgoing E-mail (Letter)
- Create an Outgoing LinkedIn Message (Letter)
- Create an Outgoing Phone Call

Critical activities which are not directly related to a specific job application can be created easily by using those workflows.[1] Run Workflow button is used to create an activity.



[1] Activities related to a job application can be created from Job Application form.

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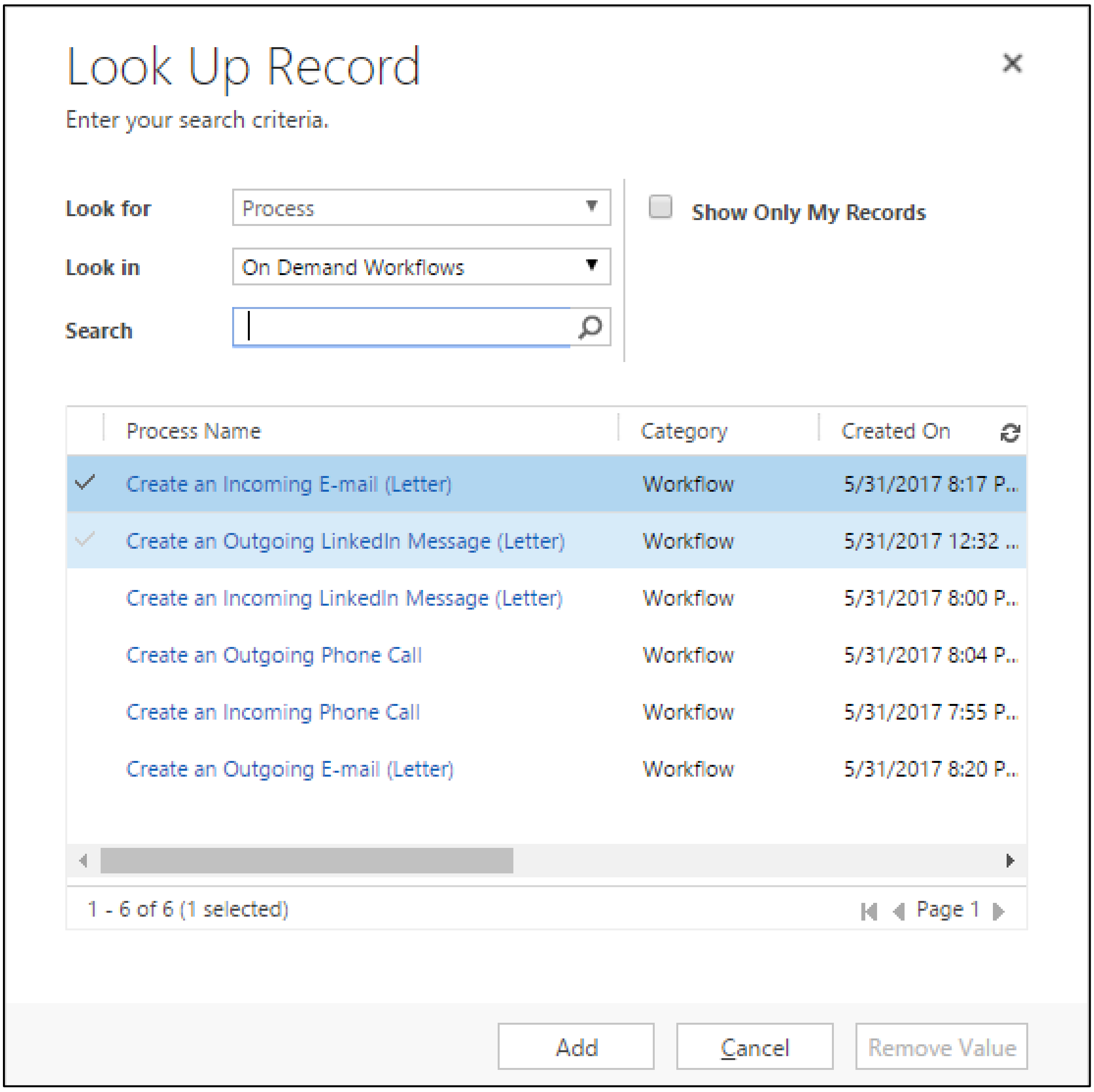
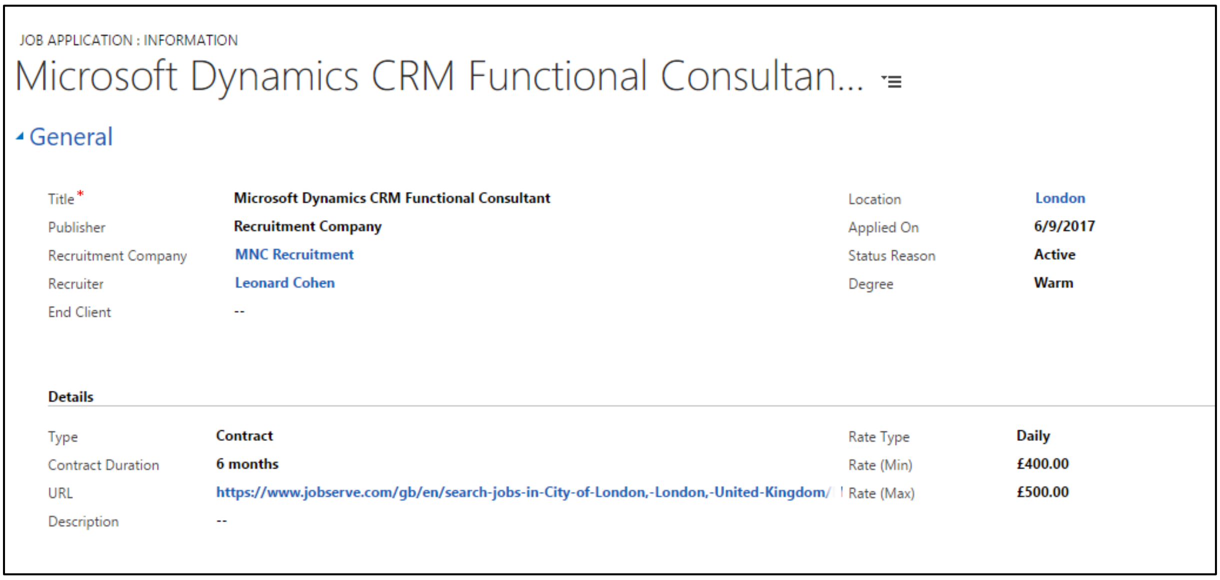


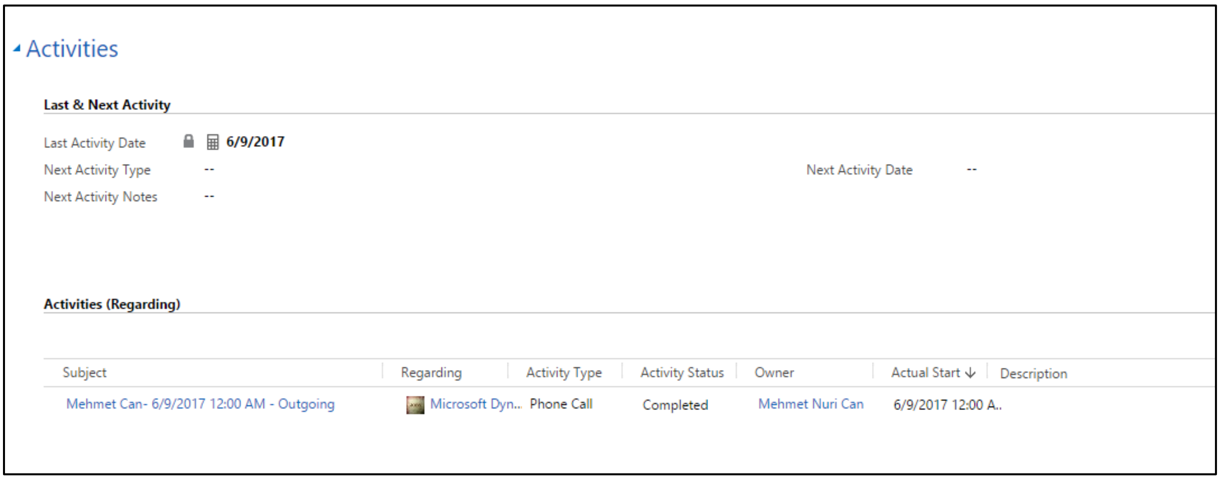
Job Applications

Job Applications entity is used for following applied positions.

Form

The screenshots of a Job Application form is given below.





Fields

Job Application form includes the fields below.

- Title
- Publisher: If the job post is published by an agency, you can choose “Recruitment Company” value for this field. If it is not, “End Client” value can be used.

- Recruitment Company: You can link the Job Application record to an existing Recruitment Company (Account) or you can create a new Account record by using quick create form of the Account entity.
- Recruiter: You can link the Job Application to an existing CRM Contact or you can create a new Contact record by using quick create form of the Contact entity.
- End Client: You can link the Job Application record to an existing End Client (Account) or you can create a new Account record by using quick create form of the Account entity.
- Location: A Location lookup has been added to the form to keep track of locations more systematically.
- Applied On
- Status Reason: Status Reason field includes following values;
    - Active (default value)
    - On Hold
    - Candidate Permission Given
    - Phone Interview with End Client
    - Face to Face Interview with End Client
    - Lost
    - Won

"Lost" and "Won" options can be chosen while deactivating a Job Application record.

- Degree: The values of this field are "Cold", "Warm" and "Hot". The default value is "Warm".

In the Details section there are fields such as;

- Type: "Contract" or "Permanent"
- Contract Duration: If the type of the application is contract, you can enter the contract duration in this field.
- URL: The URL of the job post.
- Rate Type: "Daily", "Monthly", or "Yearly"
- Rate (Min): Minimum rate of the position.[2]
- Rate (Max): Maximum rate of the position.
- Description

A calculated fields has been added to Activities in order to track last activity date.

[2] The currency of the record can be changed from Record Info tab.

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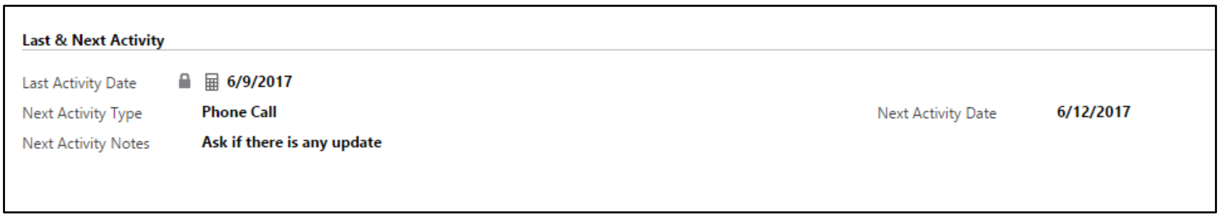
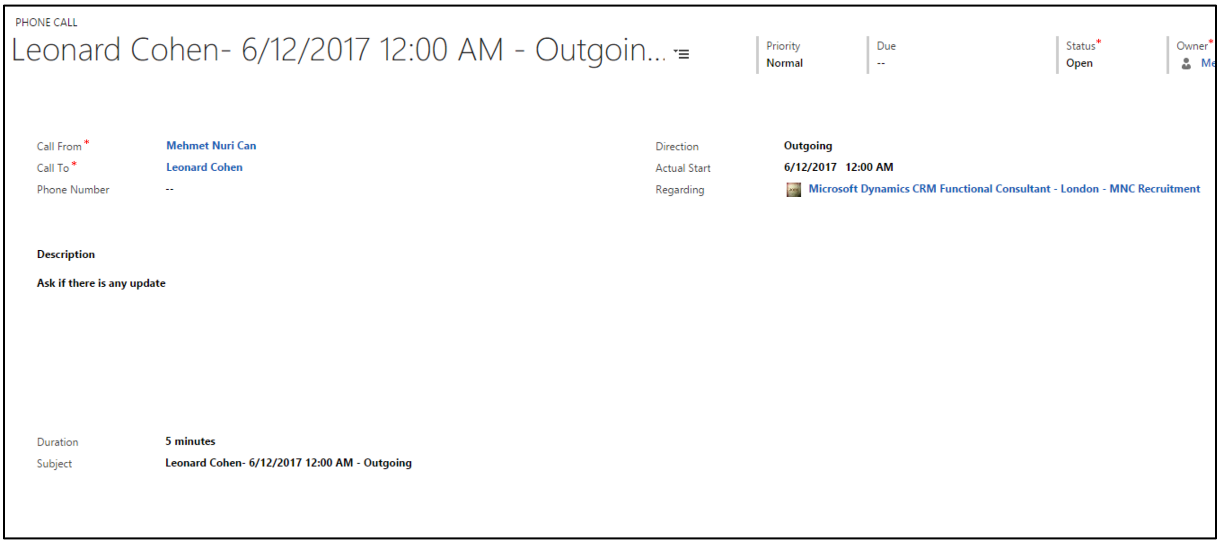
Follow-up activities are crucial in order to increase your chance to get a job. Next Activity Type, Next Activity Date and Next Activity Notes fields make creating a follow-up activity easier.

The fields can be filled as below in order to create a follow-up phone call.





Workflows

3 on-demand workflows have been developed to create an incoming activity which is related to a Job Application. They are;

- Create an Incoming E-mail (Letter)
- Create an Incoming LinkedIn Message (Letter)
- Create an Incoming Phone Call

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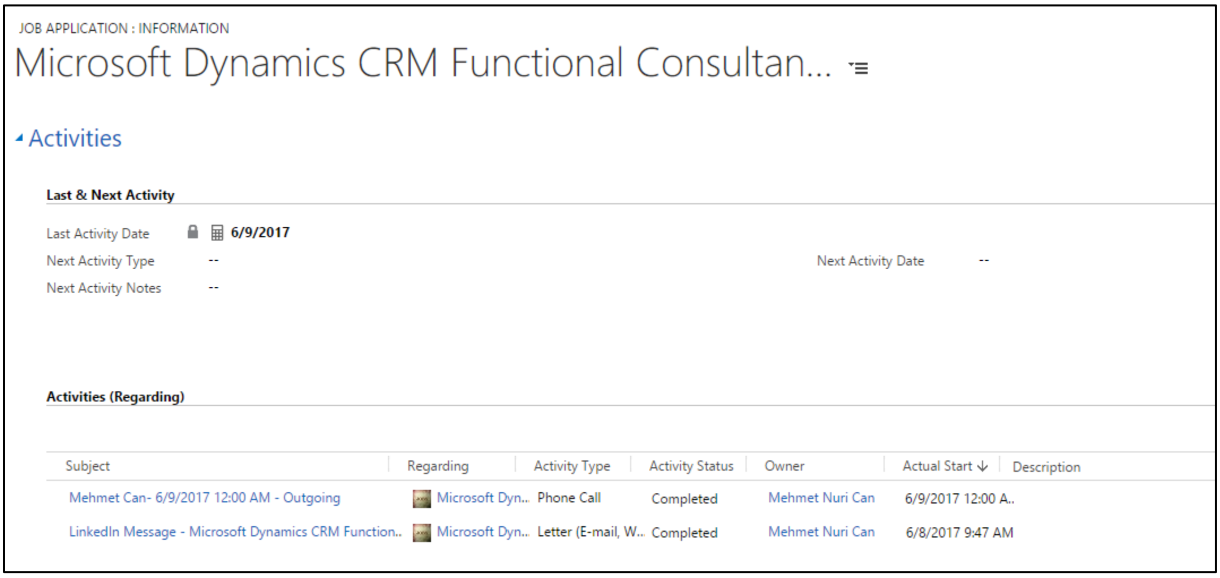
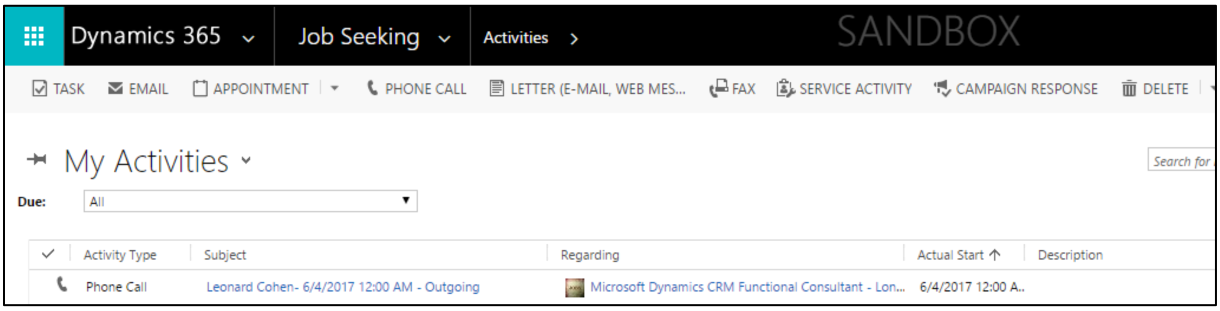
Activities

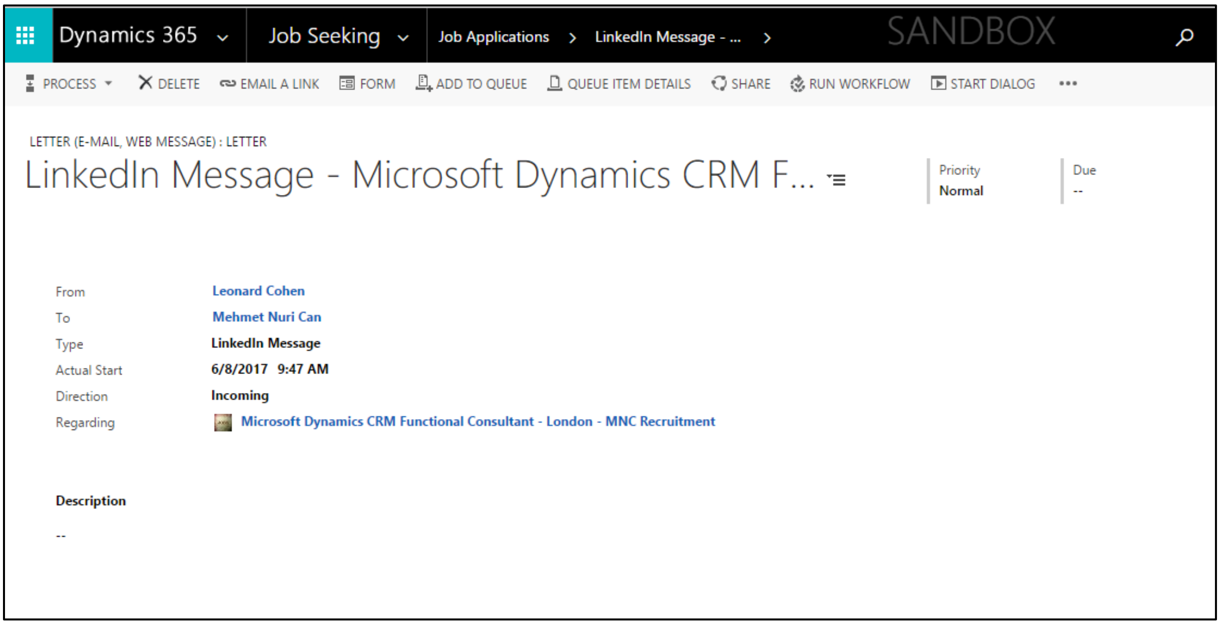
All out-of-box activity types are available to use. However, Phone Call, Appointment, and Letter activities are the ones which can be used more frequently.



Checking My Activities view is very ideal to track open follow-up activities.



Letter entity is customized to track e-mails, LinkedIn Messages and other type of web messages.



It is sure that E-mail entity can also be used to send and receive e-mails. Nevertheless, if there is not an e-mail integration in your CRM environment, in other words if you send and receive your e-mail messages manually and want to track them, using Letter entity is a simply solution.

Job Seeker's Dashboard

A job seeker dashboard has been prepared to present brief summary of job seeking activities. There are 5 graphs and 1 view in this dashboard. It is also available for mobile.