



JOB SEEKER'S CRM

USER MANUAL

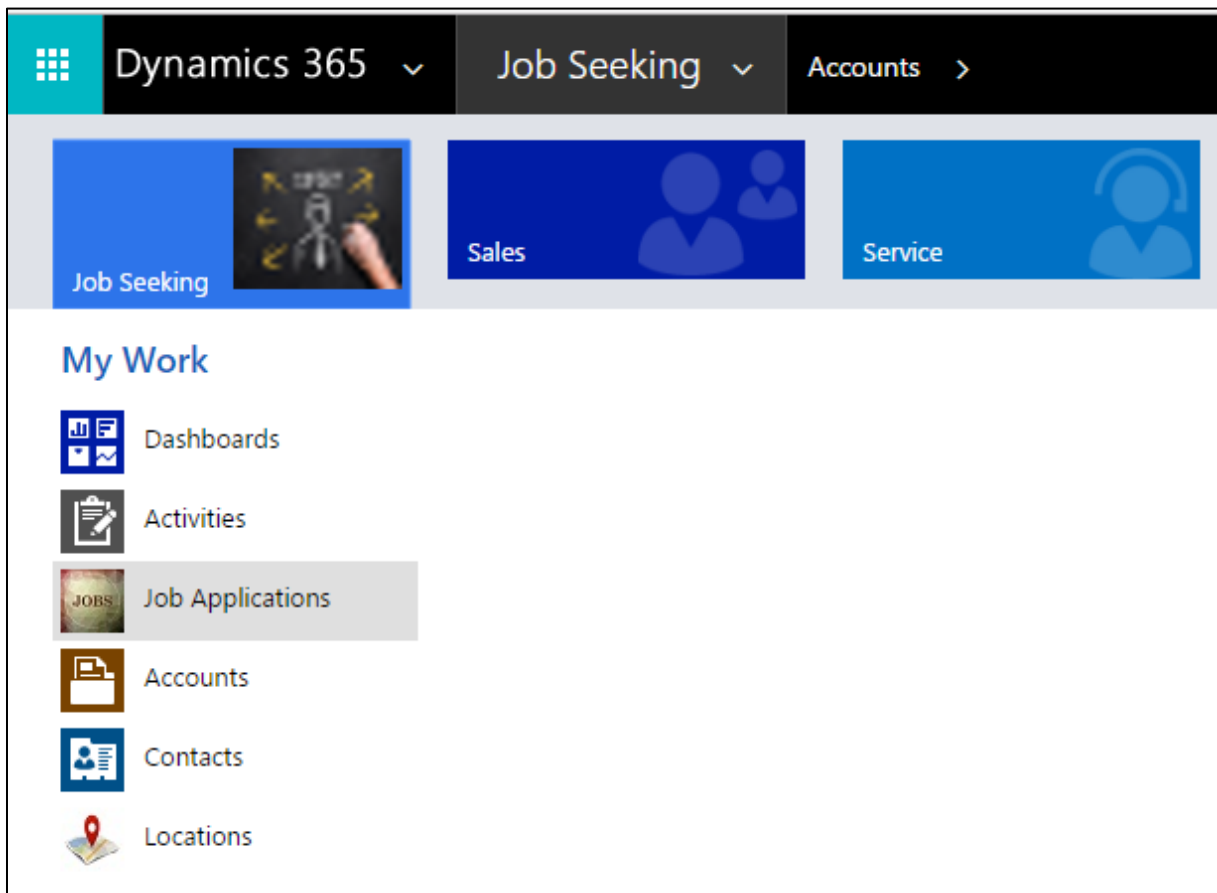
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Introduction

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.

The screenshot displays the Dynamics 365 interface for an Account form. The top navigation bar shows 'Dynamics 365', 'Job Seeking', 'Accounts', and 'MNC Recruitment'. The main header area includes the account name 'MNC Recruitment' and the owner 'Mehmet Nuri Can'. The left sidebar contains a 'Summary' section with 'ACCOUNT INFORMATION' and 'CONTACT INFORMATION'. The main content area shows the 'POSTS' tab with a post from 'MNC Recruitment' and the 'ADDRESS' tab. A 'Snipping Tool' window is open in the top right corner.

ACCOUNT INFORMATION

Account Name	MNC Recruitment
Category	Recruitment Company
Website	https://www.mncrecruitment.com
LinkedIn Page	https://www.linkedin.com/company-beta/180319
Location	London
Primary Contact	Mehmet Can

CONTACT INFORMATION

Email	mehmet@mncrecruitment.com
LinkedIn Profile	https://www.linkedin.com/in/mehmetnuran/
Business Phone	+44 000 000 0000

POSTS

Enter post here

All posts Auto posts User posts

MNC Recruitment
Account Created By Sales Demo.
On MNC Recruitment's wall
Today

ADDRESS

--

The screenshot shows the Dynamics 365 interface for an Account record named 'MNC Recruitment'. The top navigation bar includes 'Dynamics 365', 'Job Seeking', 'Accounts', and 'MNC Recruitment'. The main header area displays the account name, a placeholder for a profile picture, and the owner 'Mehmet Nuri Can'. Below this, there are two sections: 'Contacts' and 'Activities'. The 'Contacts' section contains a table with one contact record:

Full Name	Job Title	Email	LinkedIn Profile	Company Name	Business Phone	Mobile Phone	Modified On
Mehmet Can	Director	mehmet@mncrecruitmen...	https://www.linkedin.com...	MNC Recruitment	+44 000 000 0000		6/8/2017 2:05 PM

The 'Activities' section shows a table with columns for Subject, Regarding, Activity Type, Activity Status, Owner, Actual Start, and Description. It currently displays 'No Activity records found.' and an 'Active' status indicator.

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.

The screenshot shows the Dynamics 365 interface for a Contact record. The top navigation bar is the same as the previous screenshot. The main header area displays the contact name 'Mehmet Can' and the account name 'MNC Recruitment'. Below this, there are three sections: 'Details', 'Contact Information', and 'Address'. The 'Details' section contains fields for First Name, Last Name, Job Title, and Account Name. The 'Contact Information' section contains fields for Email, Business Phone, Mobile Phone, LinkedIn Profile, and Description. The 'Address' section contains fields for Street 1, Street 2, City, and ZIP/Postal Code. At the bottom right, there are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the Microsoft Dynamics 365 interface for a Contact record. The top navigation bar includes 'Dynamics 365', 'Job Seeking', 'Contacts', and 'Mehmet Can'. The main header area displays the contact's name 'Mehmet Can' and a summary of key fields: 'Last Activity Date' (empty) and 'Owner' (Mehmet Nurcan). Below the header, the 'Summary' section is expanded, showing 'CONTACT INFORMATION' with fields for First Name (Mehmet), Last Name (Can), Job Title (Director), and Account Name (MNC Recruitment). To the right, additional fields are listed: Email (mehmet@mncrecruitment.com), Business Phone (+44 000 000 0000), Mobile Phone (+44 700 000 0000), and LinkedIn Profile (https://www.linkedin.com/in/mehmetnurcan/). A 'Details' link is visible at the bottom of the summary section.

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.

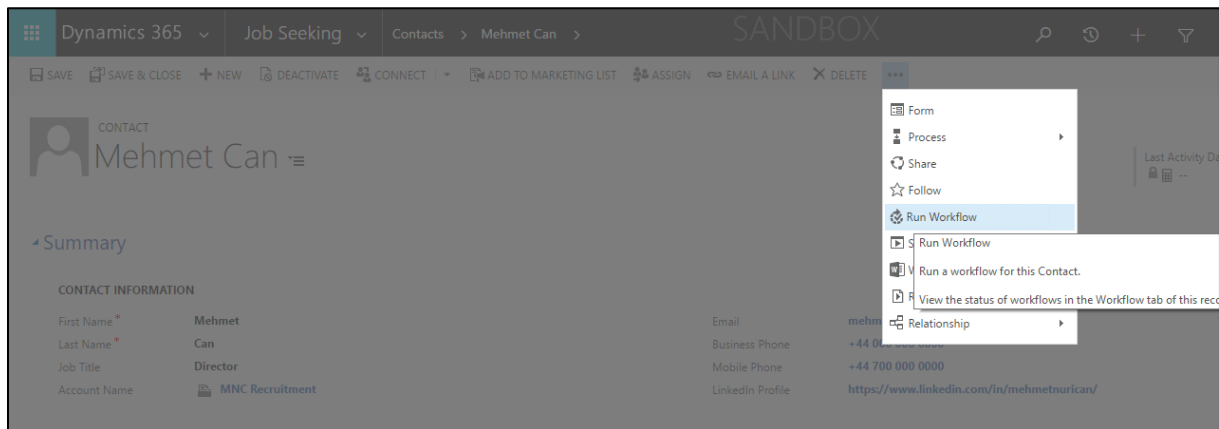
- Last Activity Date: This a calculated field which shows the date of the last activity regarding to the contact.
- Owner: The owner will be populated as the user who create the record. It is possible to update this field.

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.

Look Up Record



Enter your search criteria.

Look for

Process



Show Only My Records

Look in

On Demand Workflows



Search

|



	Process Name	Category	Created On	
✓	Create an Incoming E-mail (Letter)	Workflow	5/31/2017 8:17 P...	
✓	Create an Outgoing LinkedIn Message (Letter)	Workflow	5/31/2017 12:32 ...	
	Create an Incoming LinkedIn Message (Letter)	Workflow	5/31/2017 8:00 P...	
	Create an Outgoing Phone Call	Workflow	5/31/2017 8:04 P...	
	Create an Incoming Phone Call	Workflow	5/31/2017 7:55 P...	
	Create an Outgoing E-mail (Letter)	Workflow	5/31/2017 8:20 P...	

1 - 6 of 6 (1 selected)

⏪ ⏩ Page 1

Add

Cancel

Remove Value

Job Applications

Job Applications entity is used for following applied positions.

Form

The screenshots of a Job Application form is given below.

JOB APPLICATION : INFORMATION

Microsoft Dynamics CRM Functional Consultan...

General


Title *	Microsoft Dynamics CRM Functional Consultant	Location	London
Publisher	Recruitment Company	Applied On	6/9/2017
Recruitment Company	MNC Recruitment	Status Reason	Active
Recruiter	Leonard Cohen	Degree	Warm
End Client	--		

Details


Type	Contract	Rate Type	Daily
Contract Duration	6 months	Rate (Min)	£400.00
URL	https://www.jobserve.com/gb/en/search-jobs-in-City-of-London,-London,-United-Kingdom/	Rate (Max)	£500.00
Description	--		

Activities

Last & Next Activity

Last Activity Date	 6/9/2017	Next Activity Date	--
Next Activity Type	--		
Next Activity Notes	--		

Activities (Regarding)

Subject	Regarding	Activity Type	Activity Status	Owner	Actual Start	Description
Mehmet Can- 6/9/2017 12:00 AM - Outgoing	 Microsoft Dyn...	Phone Call	Completed	Mehmet Nuri Can	6/9/2017 12:00 A..	

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.

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.

Last & Next Activity	
Last Activity Date	📅 6/9/2017
Next Activity Type	Phone Call
Next Activity Notes	Ask if there is any update

PHONE CALL	
Leonard Cohen- 6/12/2017 12:00 AM - Outgoin... ⌵	
Priority	Normal
Due	--
Status	Open
Owner	Me
Call From	Mehmet Nuri Can
Call To	Leonard Cohen
Phone Number	--
Direction	Outgoing
Actual Start	6/12/2017 12:00 AM
Regarding	Microsoft Dynamics CRM Functional Consultant - London - MNC Recruitment
Description	Ask if there is any update
Duration	5 minutes
Subject	Leonard Cohen- 6/12/2017 12:00 AM - Outgoing

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

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.

JOB APPLICATION : INFORMATION

Microsoft Dynamics CRM Functional Consultan... ☰

▸ Activities

Last & Next Activity

Last Activity Date	6/9/2017	
Next Activity Type	--	Next Activity Date --
Next Activity Notes	--	

Activities (Regarding)

Subject	Regarding	Activity Type	Activity Status	Owner	Actual Start ↓	Description
Mehmet Can- 6/9/2017 12:00 AM - Outgoing	Microsoft Dyn...	Phone Call	Completed	Mehmet Nuri Can	6/9/2017 12:00 A..	
LinkedIn Message - Microsoft Dynamics CRM Function..	Microsoft Dyn...	Letter (E-mail, W...	Completed	Mehmet Nuri Can	6/8/2017 9:47 AM	

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

Dynamics 365 ▾ **Job Seeking** ▾ **Activities** > SANDBOX

☒ TASK
 ☒ EMAIL
 ☐ APPOINTMENT ▾
 ☒ PHONE CALL
 ☐ LETTER (E-MAIL, WEB MES...)
 ☐ FAX
 ☐ SERVICE ACTIVITY
 ☐ CAMPAIGN RESPONSE
 ☐ DELETE

🚩 My Activities ▾ Search for

Due:

✓	Activity Type	Subject	Regarding	Actual Start ↑	Description
	Phone Call	Leonard Cohen- 6/4/2017 12:00 AM - Outgoing	Microsoft Dynamics CRM Functional Consultant - Lon...	6/4/2017 12:00 A..	

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

Dynamics 365
Job Seeking
Job Applications
LinkedIn Message - ...
SANDBOX

PROCESS
DELETE
EMAIL A LINK
FORM
ADD TO QUEUE
QUEUE ITEM DETAILS
SHARE
RUN WORKFLOW
START DIALOG

LETTER (E-MAIL, WEB MESSAGE) : LETTER

LinkedIn Message - Microsoft Dynamics CRM F...

Priority
Normal
Due
--

From
Leonard Cohen
To
Mehmet Nuri Can
Type
LinkedIn Message
Actual Start
6/8/2017 9:47 AM
Direction
Incoming
Regarding
Microsoft Dynamics CRM Functional Consultant - London - MNC Recruitment

Description
--

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.

