How to Guide for CRM

1. **Create a Job Order**
   1. **CRM – Job Order – New:** type in all applicable fields and information - Save

**-*OR-***

* 1. **Collaboration – Email –** Open Email with **Job Order** document attached **– Capture ME – Job Order:**  Should open up dual screen with Job Order on the left side, and the document on the right side **– Copy/Paste** information from document into **Job Order – Save**

1. **Add a Candidate**
   1. **CRM – Candidate – New:**  type in all applicable fields and information – Save

***-OR-***

* 1. **Collaboration – Email –** Open Email with Candidate resume document attached **– Capture ME – Select Resume** (Choose from drop-down) **Candidate - Select this option to review the results of the resume(s) processed and create profiles one at a time –** **Process:** This will automatically parse the information in the document into the Candidate’s record. Verify the information and fill in any missing information and click Save.

1. **Submit a Candidate to a Job Order**
   1. Open Candidate Record – Click Submit to a Job Order – Choose appropriate Job Order – Select Other (without email) if you do not wish to send an email to the Customer – Continue

***-OR-***

* 1. Open Job Order – Search for Candidates – Select Preferred Candidate(s) – Submit

1. **Place a Candidate to a Job Order**
   1. Open Job Order – Search for Candidates – Select Preferred Candidate(s) – Place – Place Candidate pop-up screen appears – Fill in the appropriate information – Place Candidate
2. **Add a Contact**
   1. CRM – Contact – New: type in all applicable fields and information or Copy and Paste from the email/document
3. **Add a Company**
   1. CRM – Company – New: type in all applicable fields and information or Copy and Paste from the email/document
4. **Creating an eCampaign**
   1. **CRM – eCampaign – New – Type in Campaign Name in text box – Select Campaign Type – Next**
   2. A **Compose** screen will pop up**;** enter the recipients in the **TO field.** Add content to **Email** text box and click **Send Mail.** ***All recipients will be individually emailed to avoid spamming.***
5. **Manage Submissions to Job Order**
   1. **Open Job Order – Submitted Candidates – Manage Submissions**
6. **Create a Group** 
   1. **Contacts/Candidates –** Check boxes to the individuals you wish to add **– Groups – Create New Group – New Group –** Type in **Group Name** in text box – **Save – Close – Close**
7. **Create a Short List**
   1. **Candidates –** check boxes to the individuals you wish to add – **Short list –** Choose the appropriate Job Order – **OK**
   2. **To view shortlisted candidates: Job Orders – Open Job Order – Short Listed Candidates – Manage Short List**
   3. **You can Delete, Prioritize, Send Email, Add to Another List, Submit, and Place Candidates in the Short List**