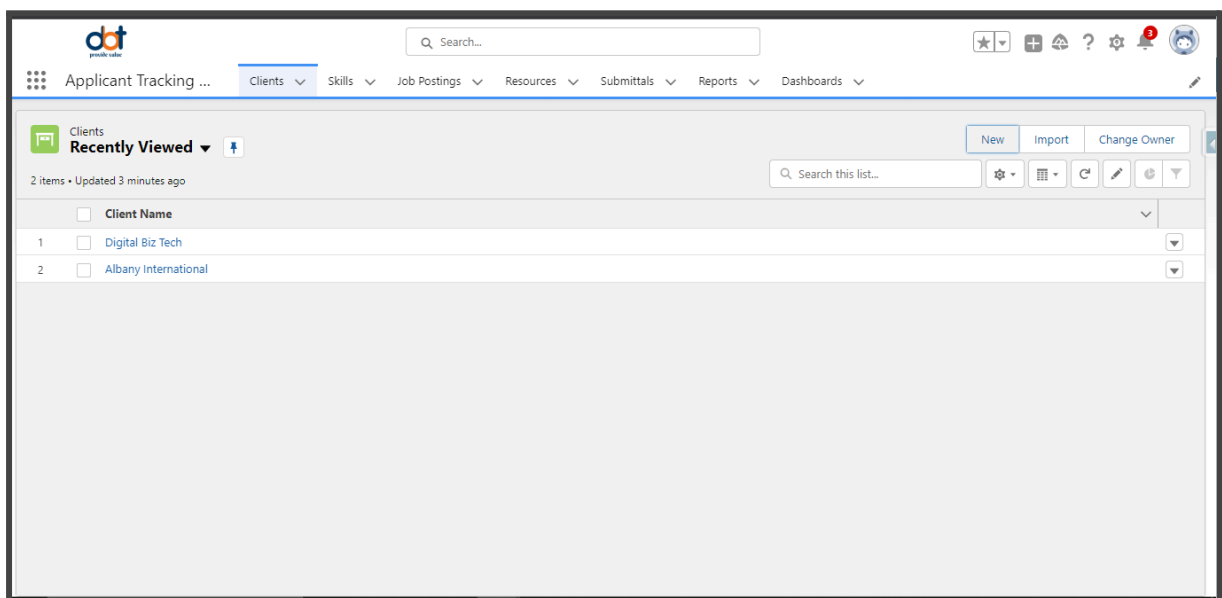


User Documentation

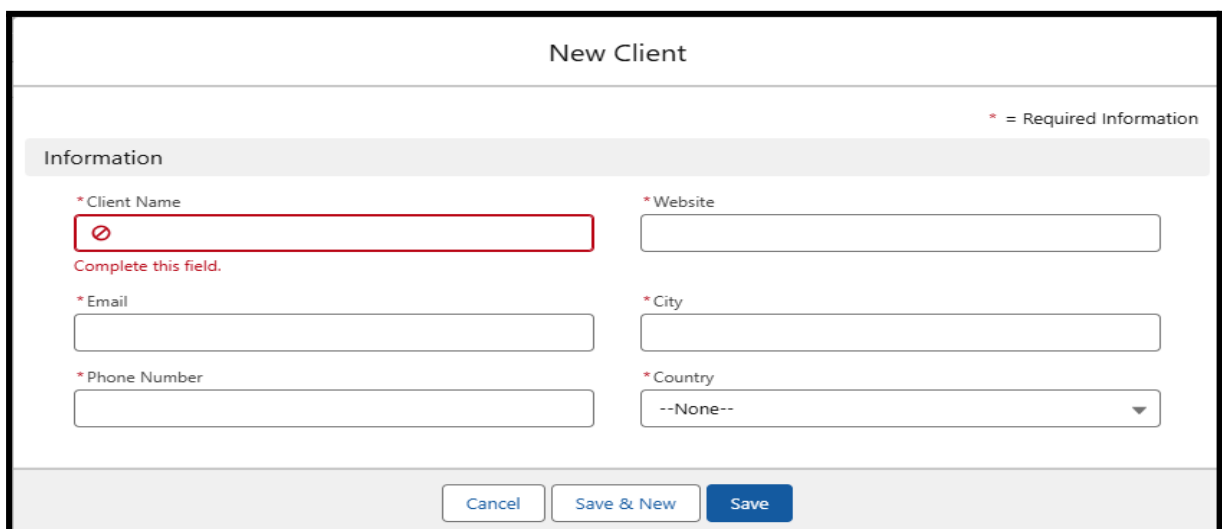
- **Clients**
- **Skills**
- **Job postings**
- **Resources**
- **Resources Related List**
- **Skill Resources**
- **Submittals**
- **Reports**
- **Dashboards**

CLIENTS

Client records are created by Business Development when a client asks for resources. To create a new client, go to **client object** and click the **new button** and fill the required details. Client Name, E.mail, Phone number, Website and City, Country are the required fields in Client Object



The screenshot displays the 'Clients' section of a software application. The top navigation bar includes 'Applicant Tracking ...', 'Clients', 'Skills', 'Job Postings', 'Resources', 'Submittals', 'Reports', and 'Dashboards'. The 'Clients' section is active, showing a 'Recently Viewed' list with two items: '1 Digital Biz Tech' and '2 Albany International'. The interface includes a search bar, a 'New' button, and various icons for actions like 'Import', 'Change Owner', and 'Search this list...'.



The screenshot displays the 'New Client' form. The form is titled 'New Client' and includes a legend '* = Required Information'. The form fields are: * Client Name (required), * Website (required), * Email (required), * City (required), * Phone Number (required), and * Country (required). The 'Client Name' field is highlighted with a red border and a red 'X' icon, indicating it is incomplete. The 'Country' field is a dropdown menu with '--None--' selected. The form has 'Cancel', 'Save & New', and 'Save' buttons at the bottom.

SKILLS

This skill object allows us to add the relevant and potential skills needed for the job. This will be used as a keyword to search suitable candidates.

To create a **new skill** go to the **skill object** and select the **new** button and type the skill name.

The screenshot shows the 'Skills' section of a CRM application. The top navigation bar includes 'Applicant Tracking ...', 'Clients', 'Skills', 'Job Postings', 'Resources', 'Submittals', 'Reports', and 'Dashboards'. The 'Skills' tab is active. Below the navigation bar, there's a search bar and a 'Recently Viewed' section showing 15 items. The main area displays a list of skills with checkboxes and dropdown menus. The skills listed are: Digital Marketing, Web Designing, SQL Server, Oracle, MS Office, SAP-MM, SAP-SD, SAP-FICO, PMP, PTC, SAP PLM, PLM Tool Administrator, PTC Windchill, Windchill SAP, and SAP MM SD.

	☐ Skill Name	
1	☐ Digital Marketing	▼
2	☐ Web Designing	▼
3	☐ SQL Server	▼
4	☐ Oracle	▼
5	☐ MS Office	▼
6	☐ SAP-MM	▼
7	☐ SAP-SD	▼
8	☐ SAP-FICO	▼
9	☐ PMP	▼
10	☐ PTC	▼
11	☐ SAP PLM	▼
12	☐ PLM Tool Administrator	▼
13	☐ PTC Windchill	▼
14	☐ Windchill SAP	▼
15	☐ SAP MM SD	▼

The 'New Skill' form is displayed. It has a title 'New Skill' and a legend '* = Required Information'. The form is divided into an 'Information' section. In this section, the '* Skill Name' field is highlighted in yellow and contains the text 'Business Analyst'. To the right of this field, the 'Owner' is listed as 'Shoba Rajesh' with a user icon. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

New Skill

* = Required Information

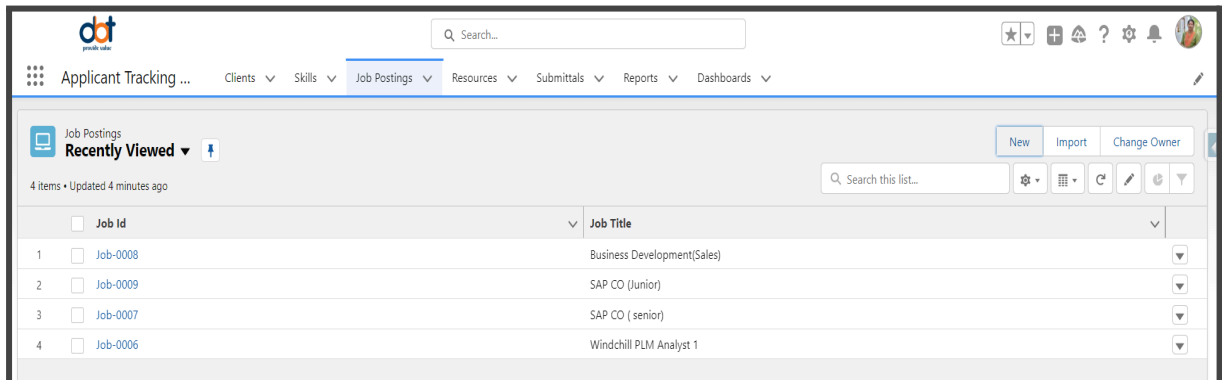
Information

* Skill Name

Owner Shoba Rajesh

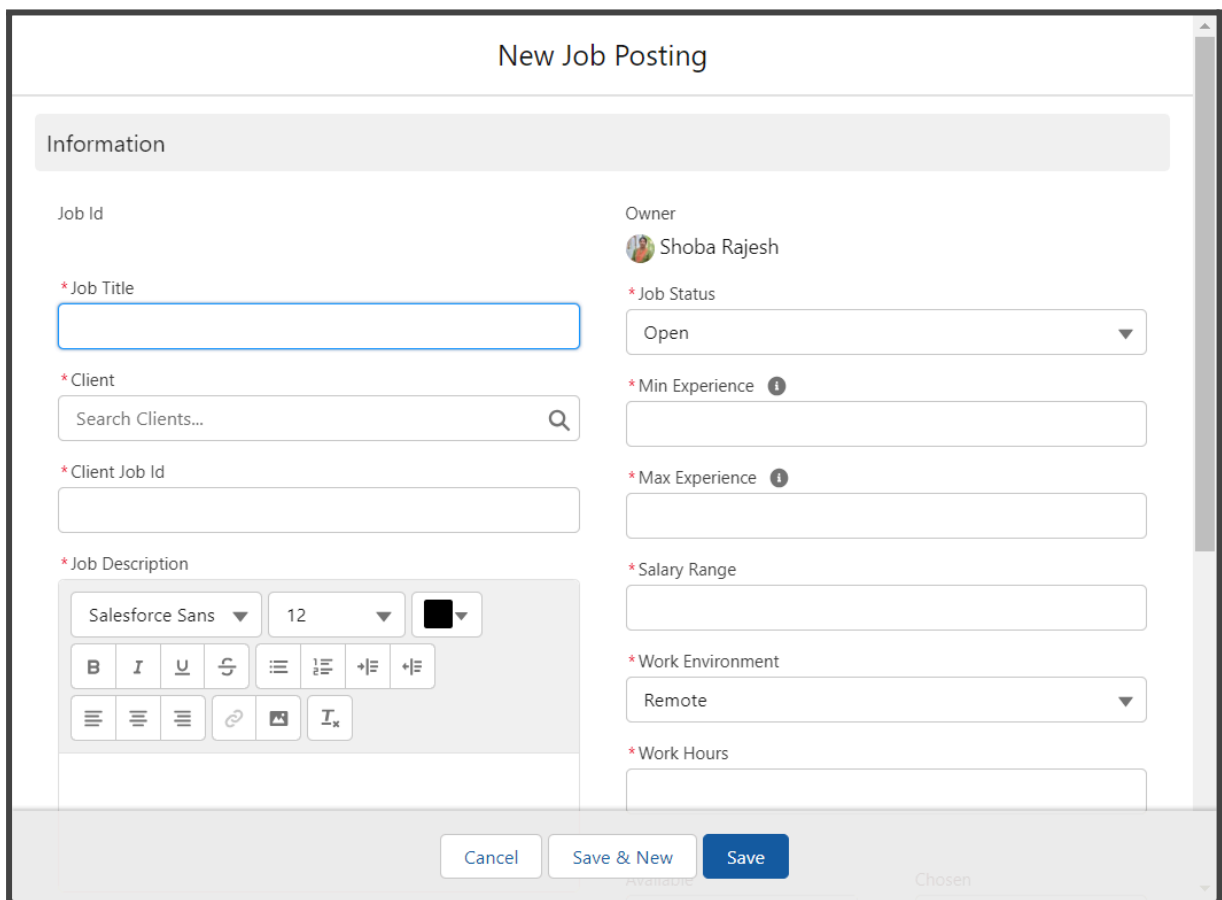
Job Posting

This feature allows access to job-related information and details and it helps job seekers to view open roles and apply to any . To create a new Job posting go to the **Job posting** object and click **New** and fill all the fields. All the fields are required fields in the object.



The screenshot shows the 'Job Postings' section of a CRM interface. At the top, there's a search bar and navigation tabs for 'Applicant Tracking ...', 'Clients', 'Skills', 'Job Postings' (selected), 'Resources', 'Submittals', 'Reports', and 'Dashboards'. Below the tabs, there's a 'Job Postings' header with a 'Recently Viewed' filter and a 'New' button. A table lists 4 items, each with a checkbox, a 'Job Id', and a 'Job Title'. The table is sorted by 'Job Title' in descending order.

☐	Job Id	Job Title
1	Job-0008	Business Development(Sales)
2	Job-0009	SAP CO (Junior)
3	Job-0007	SAP CO (senior)
4	Job-0006	Windchill PLM Analyst 1



The screenshot shows the 'New Job Posting' form. It has a title 'New Job Posting' and a section 'Information'. The form is divided into two columns. The left column contains fields for 'Job Id', 'Job Title' (required), 'Client' (searchable), 'Client Job Id', and 'Job Description' (with a rich text editor). The right column contains fields for 'Owner' (Shoba Rajesh), 'Job Status' (Open), 'Min Experience' (required), 'Max Experience' (required), 'Salary Range', 'Work Environment' (Remote), and 'Work Hours'. At the bottom, there are buttons for 'Cancel', 'Save & New', and 'Save'.

New Job Posting

Information

Job Id

Owner: Shoba Rajesh

* Job Title

* Job Status: Open

* Client: Search Clients...

* Min Experience

* Client Job Id

* Max Experience

* Job Description

* Salary Range

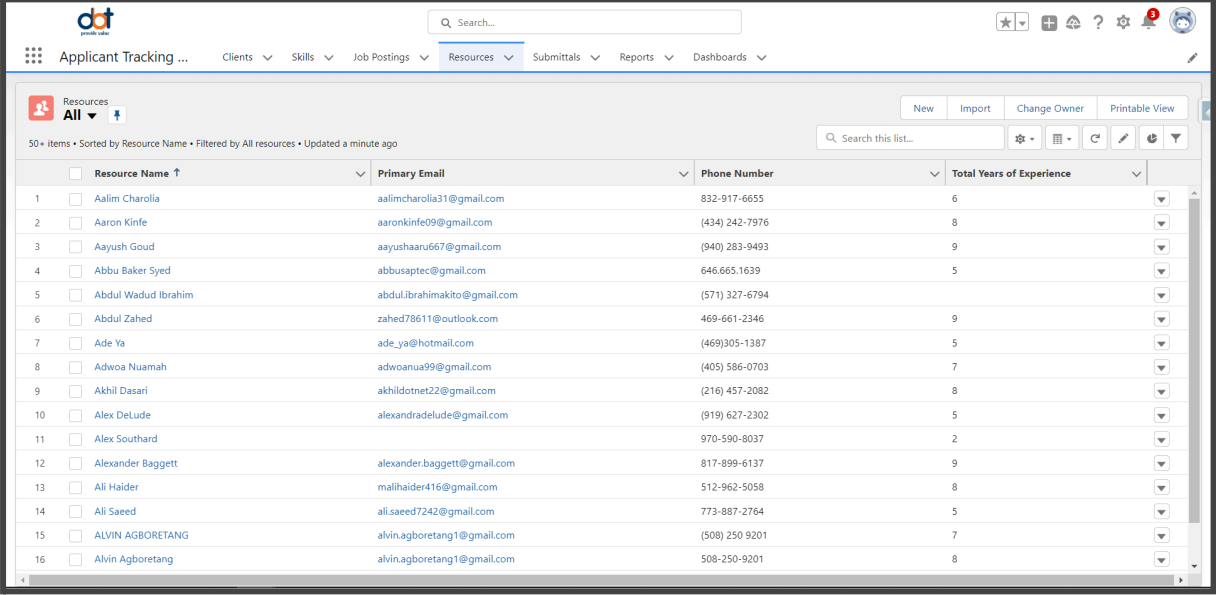
* Work Environment: Remote

* Work Hours

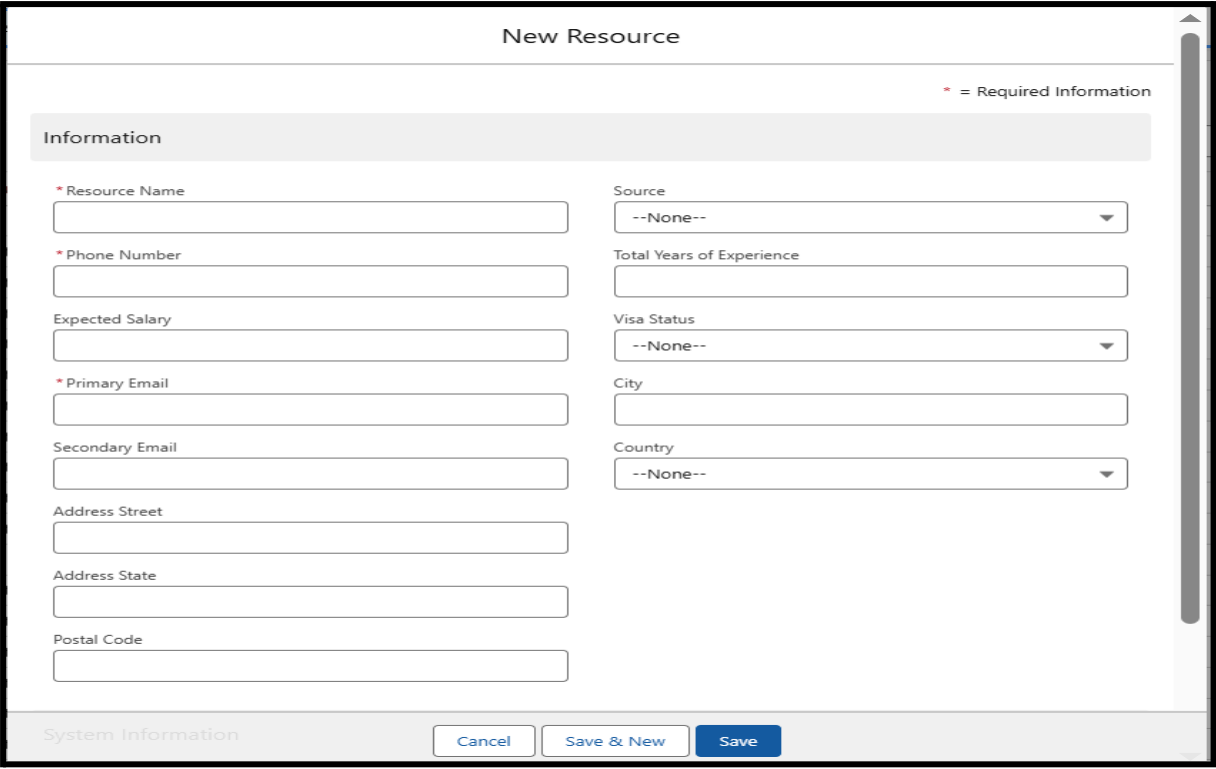
Cancel Save & New Save

Resources

Each Candidate typically has a profile associated with them. This resource object can be used to store and to organise the candidate information like name, contact no, work history etc,. To create resources go to the **Resources** object,click the **new** button and fill all the fields related to this object.



	Resource Name ↑	Primary Email	Phone Number	Total Years of Experience
1	☐ Aalim Charolia	aalimcharolia31@gmail.com	832-917-6655	6
2	☐ Aaron Kinfe	aaronkinfe09@gmail.com	(434) 242-7976	8
3	☐ Aayush Goud	aayushaaru667@gmail.com	(940) 283-9493	9
4	☐ Abbu Baker Syed	abbusaptec@gmail.com	646.665.1639	5
5	☐ Abdul Wadud Ibrahim	abdulibrahimakito@gmail.com	(571) 327-6794	
6	☐ Abdul Zahed	zahed78611@outlook.com	469-661-2346	9
7	☐ Ade Ya	ade_ya@hotmail.com	(469)305-1387	5
8	☐ Adwoa Nuamah	adwoanu99@gmail.com	(405) 586-0703	7
9	☐ Akhil Dasari	akhildotnet22@gmail.com	(216) 457-2082	8
10	☐ Alex DeLude	alexandradelude@gmail.com	(919) 627-2302	5
11	☐ Alex Southard		970-590-8037	2
12	☐ Alexander Baggett	alexander.baggett@gmail.com	817-899-6137	9
13	☐ Ali Haider	malhaider416@gmail.com	512-962-5058	8
14	☐ Ali Saeed	ali.saeed7242@gmail.com	773-887-2764	5
15	☐ ALVIN AGBORETANG	alvin.agboretang1@gmail.com	(508) 250 9201	7
16	☐ Alvin Agboretang	alvin.agboretang1@gmail.com	508-250-9201	8



New Resource

* = Required Information

* Resource Name

* Phone Number

Expected Salary

* Primary Email

Secondary Email

Address Street

Address State

Postal Code

Source

--None--

Total Years of Experience

Visa Status

--None--

City

Country

--None--

System Information

Cancel

Save & New

Save

Resources Related List

New Skill Resource

* = Required Information

Information

Junc Id

* Resource

* Skill

Version/Release

Experience

* Level of Experience

--None--

Start date i

End date i

Submittals

The Submittal object establishes a connection between the Resource object and the Job Posting object, facilitating the recruitment process tailored to the company's requirements. To create submittals, go to the **Submittal** object, click the **New** Button and fill the fields related to the object.

Q Search...

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👤

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Applicant Tracking ...

▾

Clients

▾

Skills

▾

Job Postings

▾

Resources

▾

Submittals

▾

Reports

▾

Dashboards

▾

✎

📄

Recently Viewed ▾
 👤

21 items • Updated a few seconds ago

Q Search this list...

⚙️
📄
🔄
✎
🔄
🔍

	Submittals Name	▾
1	Sub - 00057	▾
2	Sub - 00061	▾
3	Sub - 00060	▾
4	Sub - 00059	▾
5	Sub - 00058	▾
6	Sub - 00044	▾
7	Sub - 00056	▾
8	Sub - 00026	▾
9	Sub - 00055	▾
10	Sub - 00054	▾
11	Sub - 00032	▾
12	Sub - 00045	▾
13	Sub - 00046	▾
14	Sub - 00047	▾
15	Sub - 00048	▾
16	Sub - 00049	▾

New Submittal

Current Status

Stage

[View all dependencies](#)

Status

[View all dependencies](#)

Currency

Current Salary

Expected Salary

Internal Verification

Submittals Name

* Resource

* Job Posting

System Information

Reports

This object displays the summary of the number of candidates we get from different resources, how many of them moved to the interview process and how many of them got hired etc., we can use reports to gain insights into recruiting performance, identify the bottlenecks and challenges in the hiring process and streamline the recruitment efforts accordingly.

★ + 🏠 ? ⚙️ 🔔 👤

Applicant Tracking ...
Clients ▾
Skills ▾
Job Postings ▾
Resources ▾
Submittals ▾
Reports ▾
Dashboards ▾

Report: Job Postings with Submittals and Resources

Enable Field Editing
🔍
Add Chart
📄
Edit ▾

Total Records

7

	Submittal: Submittals Name	Resource: Resource Name	Job Title	Client Job Id	Resource: Phone Number	Resource: Primary Email	Stage	Status	Current Salary
1	Sub - 00056	Kevin L. Parker	Windchill PLM Analyst 1	-	📞 248-885-6653	kparker1@hotmail.com	Submitted	In Progress	100k
2	Sub - 00057	Sonali Chauhan	Business Development(Sales)	-	📞 7888471085	mailsonali2905@gmail.com	Ready to Submit	In Progress	-
3	Sub - 00073	Mithun Francis	Business Development(Sales)	-	📞 7907243919	mithunf73@gmail.com	Prospect	In Progress	-
4	Sub - 00063	Santhosh Kumar Suriyakumar Anbazhagan	SAP CO (Junior)	-	📞 571-397-1858	santhoshkumar@vt.edu	Internal Verification	In Progress	80+
5	Sub - 00064	Gayathri Duvvuru	SAP CO (Junior)	-	📞 (201) 562-2545	gayathriduvvuru1@gmail.com	Internal Verification	In Progress	Not working. 10 ye
6	Sub - 00065	Om Parikh	SAP CO (Junior)	-	📞 945-257-4258	parikh.om@yahoo.com	Prospect	In Progress	-
7	Sub - 00062	Hala Badr	SAP CO (Junior)	-	📞 +1 720 879 9999	halabadr0111@gmail.com	Internal Verification	In Progress	120k

