

# Working with Job Orders

SYSADM determines certain settings/behaviors including:

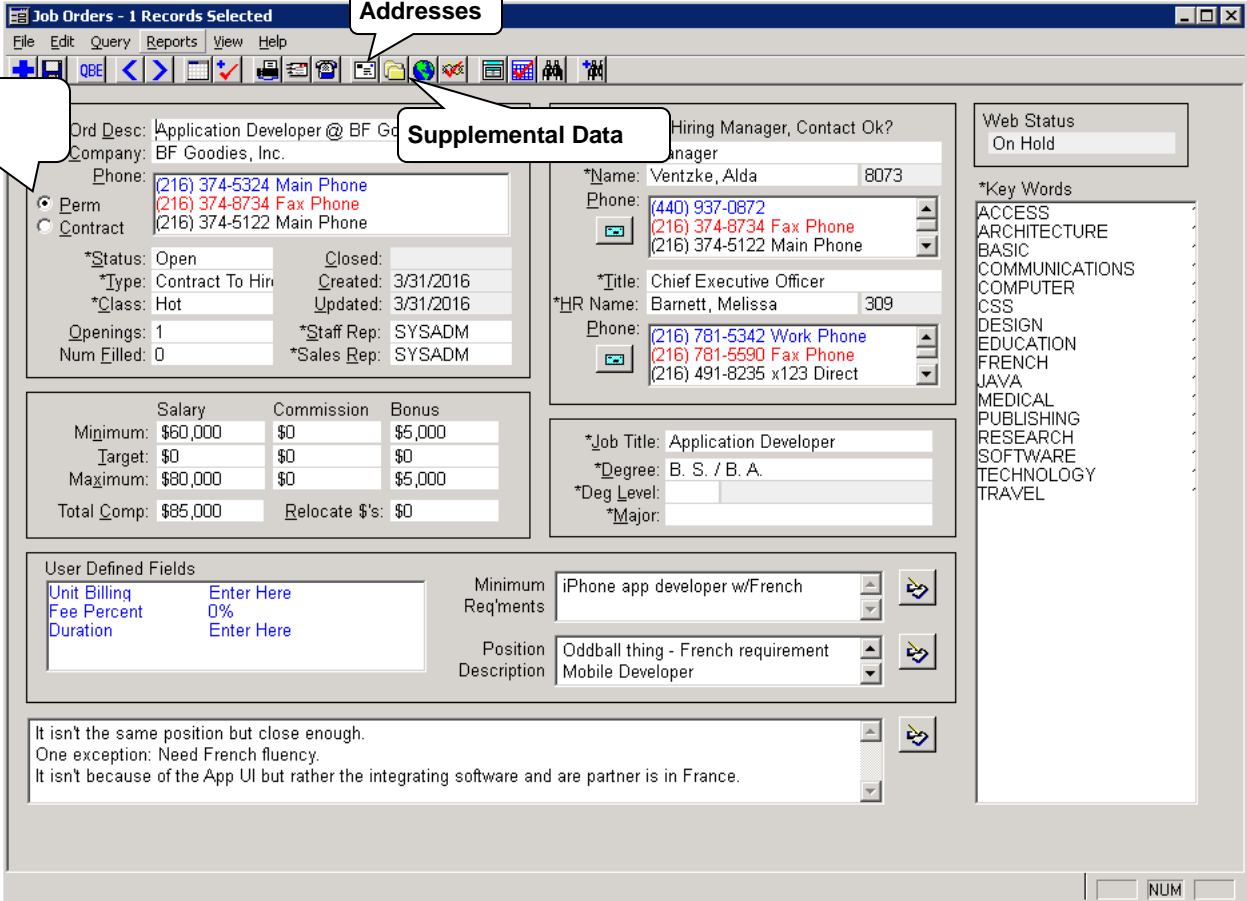
- Whether a WinSearch alarm or email is sent out when a job order is created.
- Choices for drop down boxes including Status, Type and Class.
- Available UDFS
- Whether sent emails from WinSearch are Resume Submittal activities vs. email ones

These settings are briefly covered at the end.

## Job Orders

### Creating Job Orders

- Where can you create a Job order from?
  - ✓ Main WS Toolbar
  - ✓ Company Record
  - ✓ Contact Record ← *the best place to create a Job Order!*



The screenshot shows the 'Job Orders - 1 Records Selected' window. It features a menu bar (File, Edit, Query, Reports, View, Help) and a toolbar. The main area is divided into several sections:

- Addresses:** A callout points to the 'Addresses' section, which lists phone numbers for the hiring manager and HR name.
- Supplemental Data:** A callout points to the 'Supplemental Data' section, which includes fields for Name, Title, HR Name, and Job Title.
- Perm vs. Contract:** A callout points to the 'Perm vs. Contract' section, which has radio buttons for 'Perm' and 'Contract'.
- Salary Table:** A table showing salary, commission, and bonus information.
- User Defined Fields:** A section for customizing job order fields.
- Key Words:** A list of keywords for the job order.

Minimum	Salary	Commission	Bonus
Minimum:	\$60,000	\$0	\$5,000
Target:	\$0	\$0	\$0
Maximum:	\$80,000	\$0	\$5,000
Total Comp:	\$85,000	Relocate \$'s:	\$0

**User Defined Fields:**

Unit Billing	Enter Here	Minimum Req'ments	iPhone app developer w/French
Fee Percent	0%	Position	Oddball thing - French requirement
Duration	Enter Here	Description	Mobile Developer

**Key Words:** ACCESS, ARCHITECTURE, BASIC, COMMUNICATIONS, COMPUTER, CSS, DESIGN, EDUCATION, FRENCH, JAVA, MEDICAL, PUBLISHING, RESEARCH, SOFTWARE, TECHNOLOGY, TRAVEL

**Notes:** It isn't the same position but close enough. One exception: Need French fluency. It isn't because of the App UI but rather the integrating software and are partner is in France.

- Perm vs. Contract
  - ✓ What are the different fields that are displayed



### Also accessible in Supplemental Data

- Useful Icons
  - ✓ Supplemental Data
    - Benefits, Perks & Relocation are pulled from Company
  - ✓ Addresses
    - Billing vs Work Location
- Adding additional Contacts
  - ✓ Only contacts that are linked to the Company that is linked to the job order will be available

### Position Description & Key Words

- Copy Job Description from email
- Review Pop up editor & spell check
- Right click to get Keywords
  - ✓ Key Words can be automatically or manually populated
  - ✓ Key Word coding allows for quick & easy Searching

### Pick Manager From a Different Company

- Move to Name or HR Name and press **F2**
- Click QBE  toolbar button.
- Enter person's name or company Name.
- Click Execute  toolbar button.
- Double-click row header or choose Select command.

### Finding Job Orders

- **Job Orders -> Memorized Queries -> Open Job Orders** can find all open job orders
- Other memorized queries can be added

### Reports for Job Orders

- Use **Reports -> Standard Reports** command once job order(s) are selected.
- Use Job Order Detail Without Billing Info for a detail on the job order.
- Use Job Order Listing Report to list all open orders after selecting a command like **Job Orders | Memorized Queries | Open Job Orders**


### Adding Files to Companies

- Files & documents such as position descriptions can also be added to Companies
  - ✓ Cannot be added to Job Orders
  - ✓ Adding to the company record is great for organizing documents & is an easy way to send documents to candidates
- Adding files from MS Outlook
  - ✓ Any file type is supported here (.doc, .docx, .pdf, .jpg, .xls, .xlsx)
  - ✓ Use the paperclip to add attachments to Company Record

## **Job Orders and Activities**

- Activities created from searches tied to job order automatically link job order, company and managers when job order is linked to search
- Next Contact activities created from searches automatically link job order without managers when job order is linked to search
- Activity Log in Job Orders has all activities tied to specific job order
- Activity Links in Job Orders summarizes links for up to 3 types of activities.

## **Running a Search from a Job Order**

- Click “Create new Search” from the Job Order Toolbar 
- Key Words will be automatically pulled into the Search Facility
  - ✓ Modify REQ and DES Key Words to fit your search
- Search is now linked to the Job Order
  - ✓ Any activities created or emails sent from Search list will automatically link the Job Order to the Activity
  - ✓ Job Orders & other records can be manually linked as well

## *Working with Candidates and Job Orders*

### **Create an Email Blast**

- Send the Job Description to candidates using the “Attachments” button
  - ✓ Say “no” to prompt asking to attach candidates resumes
  - ✓ Select email attachments screen will give an option to select docs for the Company (what we added earlier)
- Email will send with pdf attachment (view in Outlook “Sent Items”)
- Job Order is linked in Email Sent Activity in WinSearch

## *Resume Submittals*

### **Resume Submittals through WS**

- Begin resume submittal off of Search List
- Review Candidate Resume before Submittal
  - ✓ Make sure correct Primary Doc is chosen
- Select Candidate & choose to “Email Documents”
  - ✓ This will automatically prompt you to attach the Primary Doc
  - ✓ Email for the Contact linked to the Job Order will auto-populate
- Choose “Resume Submittal Activity”

### **Using Resume Submittal Activities**

- Resume Submittal Activities are automatic activities that SYSADM can set up
- Once SYSADM turns on this event the “Resume Submittal” checkbox is available
- Creates a Submittal or Send-out Activity as opposed to just “Email Sent”
- Job Orders are also linked to Activity if initialized from Search List or Job Order

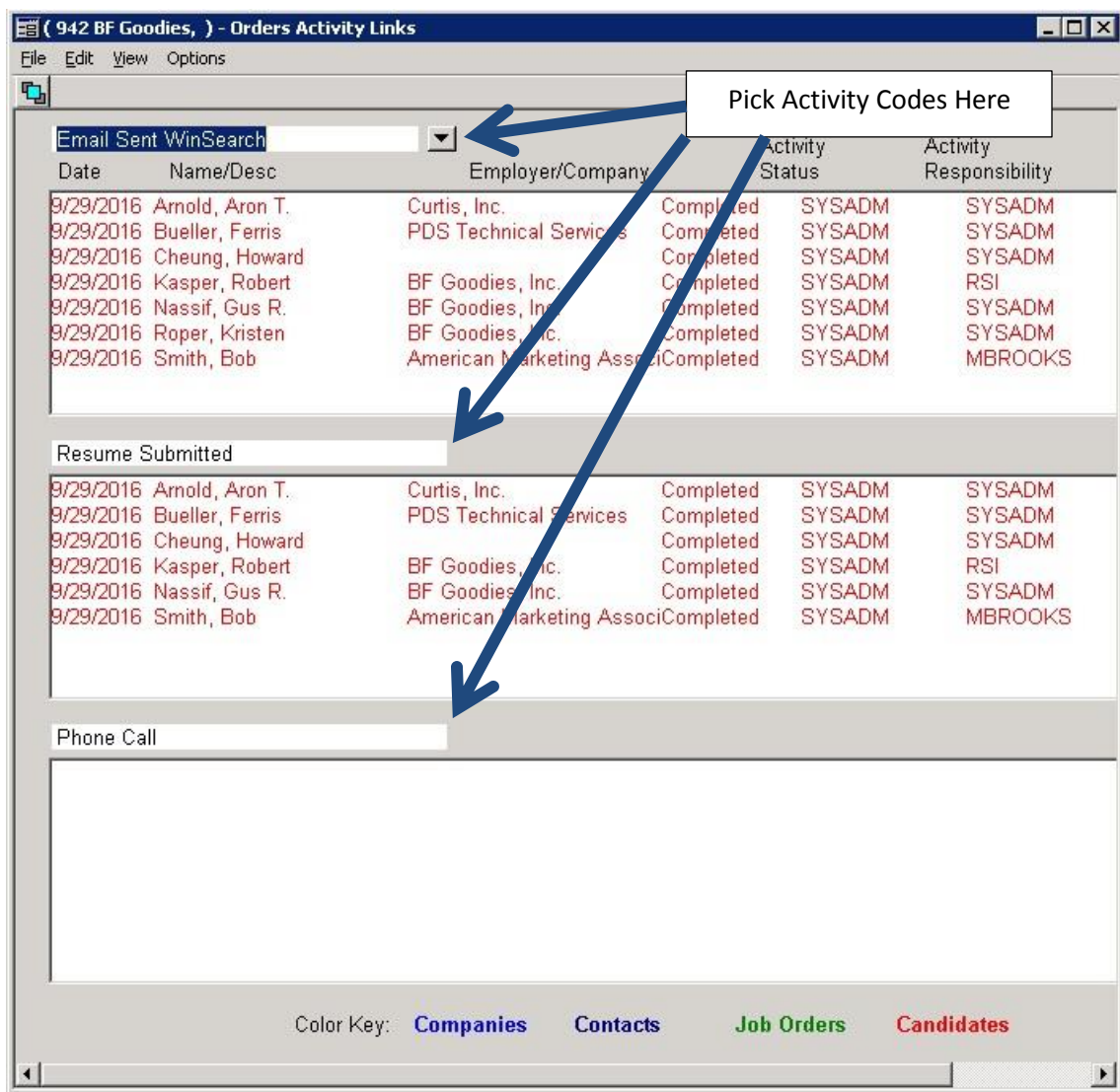
## Other Job Order Tips

### Re-Using existing Job Orders (copy-paste)

- Job Orders can be re-used if the Company requests a similar position
- Steps:
  - 1) Select Edit → **Copy Record**
  - 2) Create new Job Order using Blue Plus icon
  - 3) Select Edit → **Paste Record**
  - 4) Change any information necessary

### Activity Links

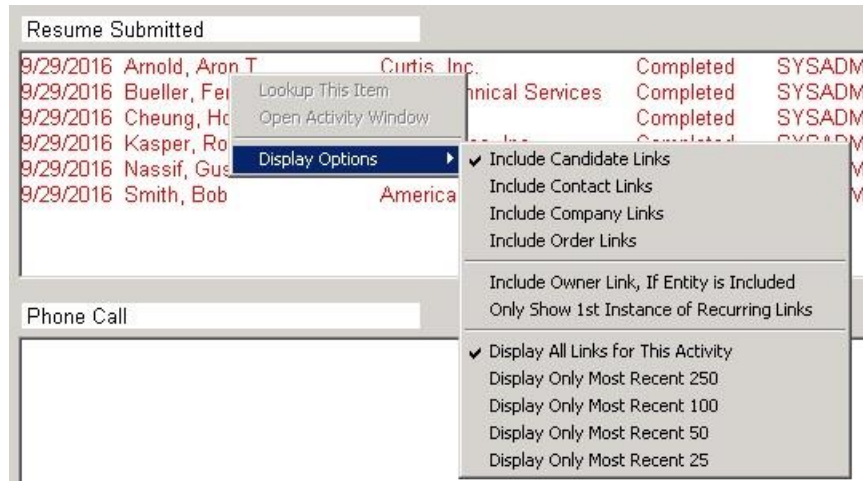
- Click on Activity Links (🔗) to open window. Choose up to 3 activity codes to summarize.



The screenshot shows a software window titled "( 942 BF Goodies, ) - Orders Activity Links". It contains a table with the following columns: Date, Name/Desc, Employer/Company, Activity Status, and Activity Responsibility. The table is divided into three sections: "Email Sent WinSearch", "Resume Submitted", and "Phone Call". A callout box labeled "Pick Activity Codes Here" has arrows pointing to the "Activity Status" and "Activity Responsibility" columns. A color key at the bottom identifies "Companies" (blue), "Contacts" (grey), "Job Orders" (green), and "Candidates" (red).

Date	Name/Desc	Employer/Company	Activity Status	Activity Responsibility
9/29/2016	Arnold, Aron T.	Curtis, Inc.	Completed	SYSADM
9/29/2016	Bueller, Ferris	PDS Technical Services	Completed	SYSADM
9/29/2016	Cheung, Howard		Completed	SYSADM
9/29/2016	Kasper, Robert	BF Goodies, Inc.	Completed	RSI
9/29/2016	Nassif, Gus R.	BF Goodies, Inc.	Completed	SYSADM
9/29/2016	Roper, Kristen	BF Goodies, Inc.	Completed	SYSADM
9/29/2016	Smith, Bob	American Marketing Associ	Completed	MBROOKS

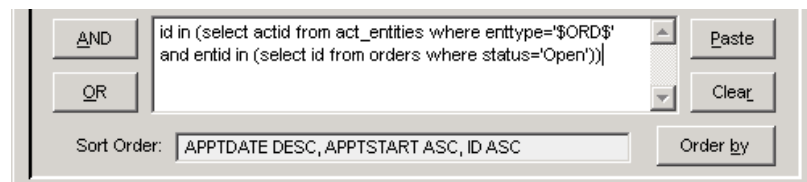
- Choose what appears in the bigger boxes by right-clicking them. Choosing **Display Options** is where you choose whether or not WinSearch shows candidates, contacts, companies or job orders.



### Query for Activities Connected to Open Job Orders

- Set up a memorized query to bring up all activities in the Daily Planner tied to open job orders.
  - Open the Daily Planner window.
  - Select the **Query -> Advanced SQL Query** command
  - Paste the following into the big box in the middle:

**id in (select actid from act\_entities where enttype='\$ORD\$' and entid in (select id from orders where status='Open'))**



- Click the **New** button.
  - Type a name such as **Activities for Open Job Orders** and click **Save**.
  - Click **Execute**.
- Create a Breakdown Graph of the report
    - Select the **Reports -> Standard Reports** command.
    - Choose Breakdown Graph as the report format.
    - Click **Print** or **Preview**.
    - Click No when prompted to have a few or all records in the report.

## Automatic Actions for Job Orders

Sysadm can set up emails to be sent or alarms to occur when job orders are added.

- SYSADM sets up the activity code to use with the **Settings -> SYSADM Options -> Activity Code Setup**.
- Have Alarms set by using the Notify Staff Reps or Notify These Users.
- Have emails sent by turning on Enable Email Notification and then entering the email address(es) to send the email to in the box below.
- SYSADM turns on automatic activities for new job orders with the **Settings -> SYSADM Options -> Automatic Activity Logging** command. Highlight Job Order Creation, select the Turn On check box then pick the activity code.

Activity Code: Job Order Created  
 Code Desc:  
 Default Status: Completed  
 Cost Category:  Allow Edit  
 Cost Amount: \$0.00  Allow Edit  
 Follow Up Act:

User Selectable Activity (i.e. Not Auto Log ONLY)  
 Always Place this Activity on Calendars

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Enable Email Notification (Enter Addresses Below)

gabby@winsearch.com

Use commas, spaces, and/or new lines to separate

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Include Staff Reps  
 Include these Users:

ABCDEF  
 GABBY  
 GLAWRENCE  
 JANE  
 JUNK  
 SYSADM

Notify Staff Reps  
 Notify these Users

ABCDEF  
 GABBY  
 GLAWRENCE  
 JANE  
 JUNK  
 SYSADM

Gabby Lawrence

Extra line breaks in this message were removed.

Sent: Tue 4/5/2016 3:17 PM

To: Gabby Lawrence

277 Infracflex / Program Developer - Job Order

222 Infracflex - Company

1276 Balzarelli, Giancarlo - Client Contact Automatic Log Entry: Job Order Record Creation

