

HOW TO ARRANGE AN INTERVIEW BETWEEN A CLIENT AND A CANDIDATE

To arrange an interview with a client click on the top bar =>Speculative interview

ibitest1

Summary Activities        

Summary Speculative Interview

COMPANY INFO		CONTACT DETAILS		OWNERSHIP DETAILS	
Name	ibitest1	Telephone No		Temp Cons	Laura Amin
Client ID	1109897	Address 1	kilburn road	Perm Cons	Laura Amin
Status	Active	City/Town		Contract Cess	Laura Amin
Parent Company		Country		Consultant	
Head Office		Change Address		Grading	B
Primary	Hotel/Lesure/Restaurant	Website		Grading	
D & B Check		Blacklisted		Client Bureau ID	1034605

GENERAL NOTES

this is a test please do not take in consideration

CLIENT ACTIVITY

Date	Workflow Task	Notes	Document	Recruiter
26/11/17 11:32	New Contract Added recapt ibitest1	g/pgh		Laura Amin
26/11/17 11:06	New Perm Job Added recaptionist ibitest1 Laura Test1			Laura Amin
26/11/17 11:04	New Client Name	Original Name ibitest New...		Laura Amin
26/11/17 10:59	Attended Client Visit ibitest1 Laura Test1 architect	0000000		Laura Amin
23/11/17 12:53	New Contract Added test54 ibitest1			Laura Amin
23/11/17 09:22	Canva Call logged Laura Test1	test		Laura Amin

CONTACTS

Contact	Position	Status	Phone No.
Laura Test1	Contact	Active	

Fill all the red boxes with mandatory information=>Confirm

The screenshot shows a web browser window titled 'Speculative Interview - Internet Explorer'. The URL is <http://10.127.50.112/WebApp/ViewManager?ID=8998194®IONID=1&ACTIONCODE=VIEW&ACTIONTYPE=NONENTITY&urlFrom=null&CALLERVIEW=>. The page is titled 'Speculative Interview'.

Fields highlighted with red boxes (mandatory information):

- Client: (blank)
- Contact/Book By: Laura Test1
- Interview Notes: (blank)
- Telephone Number: (blank)
- Interview to be held at: Client Address
- Address Line 1: kilburn road
- Address Line 2: (blank)
- Locality: (blank)
- City/Town: (blank)
- County: (blank)
- Post Code: (blank)
- Country: (blank)
- Candidate: Laura Test1
- Date: 02/12/17
- Start Time: 11:00
- End Time: 12:00
- Resource: (blank)
- Send Docs By: Email
- If Post, Which address: (blank)
- Inc. CC Emails: (blank)
- Confirm button

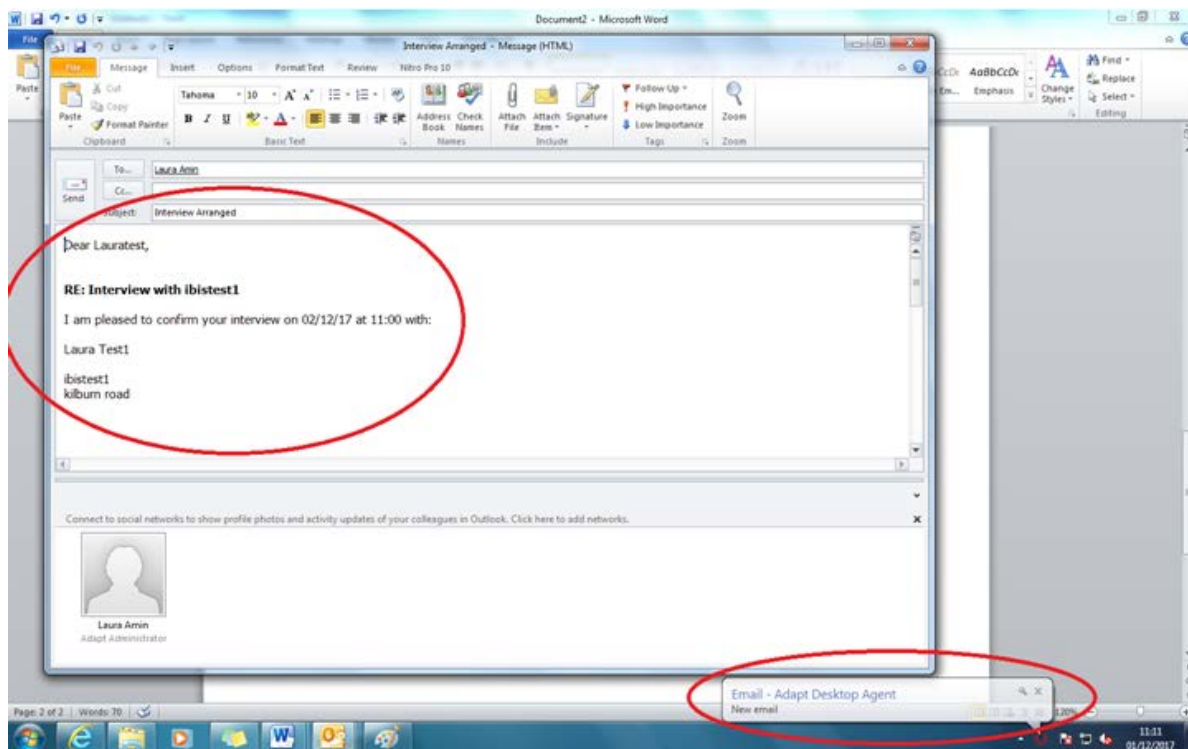
A window will display with a filled template

The screenshot shows a web browser window titled 'Speculative Interview Documents By Email - Internet Explorer'. The URL is <http://10.127.50.112/WebApp/ViewManager?ID=8998195®IONID=1&ACTIONCODE=VIEW&ACTIONTYPE=NONENTITY&urlFrom=null&CALLERVIEW=>. The page is titled 'Documents By Email'.

Fields highlighted with red boxes (mandatory information):

- Candidate Docs: Interview Confirmation..
- Email: laura.amin@coylas.co.uk
- Contact Docs: Interview Confirmation..
- OK button

Once clicked ok another window will automatically open in Outlook with an email to the client, you can amend your message directly there if you need to



Once the email has been sent to the client, you can follow and see the interview in both Adapt and Outlook tasks page

