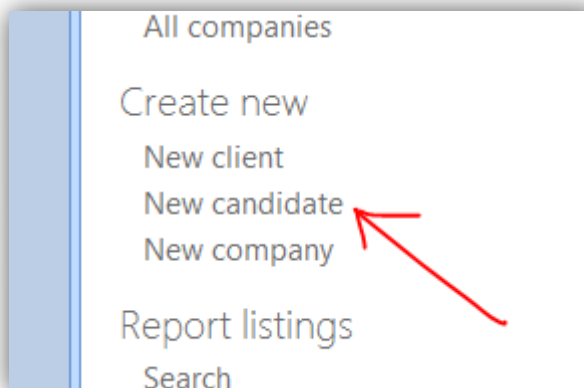


# How do I create a candidate record?

(Without a CV method)

If you wish to create a new candidate record but do not have a CV to import or attach at this stage then use the instructions in this help guide to create the new record. You can always add a CV to the record at a later date if you wish.

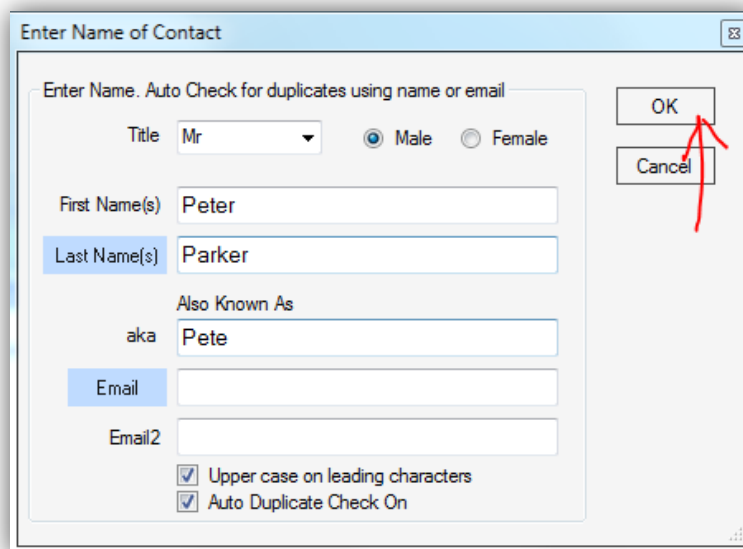
1. From the main menu in Recruit Studio, click 'New candidate'.



2. Fill in the name of the candidate and any other information you can at this stage.

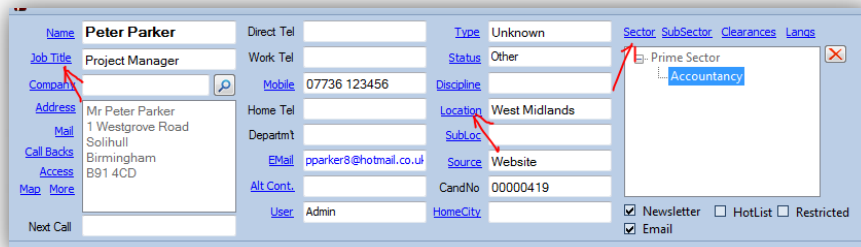
*Use the 'Last Name' button to check if this candidate already exists if you wish.*

Click 'OK' when finished.

A screenshot of a dialog box titled 'Enter Name of Contact'. It contains several input fields: 'Title' (Mr), 'First Name(s)' (Peter), 'Last Name(s)' (Parker), 'Also Known As aka' (Pete), 'Email', and 'Email2'. There are radio buttons for 'Male' and 'Female'. At the bottom, there are two checked checkboxes: 'Upper case on leading characters' and 'Auto Duplicate Check On'. On the right side, there are 'OK' and 'Cancel' buttons. A red arrow points to the 'OK' button.

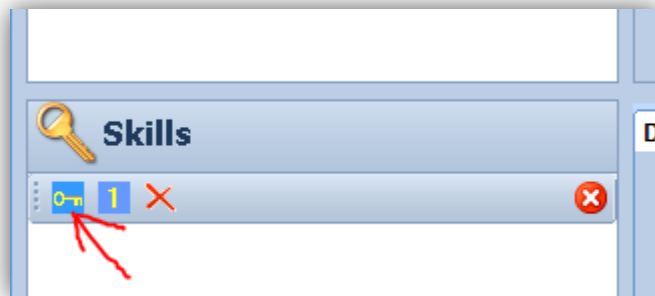
3. Work through the personal information panel filling in as much detail as you can.

*Even if you do not know much about the candidate at this stage, it is well worth filling in at least their sector, any sub-sectors, location, source and discipline as these fields all help to find the candidate later.*

A screenshot of a candidate record form for 'Peter Parker'. The form is divided into several sections: 'Name' (Peter Parker), 'Job Title' (Project Manager), 'Address' (1 Westgrove Road, Solihull, Birmingham, B91 4CD), 'Direct Tel', 'Work Tel', 'Mobile' (07736 123456), 'Home Tel', 'Department', 'Email' (pparker8@hotmail.co.uk), 'Alt Cont.', 'User' (Admin), 'Type' (Unknown), 'Status' (Other), 'Discipline', 'Location' (West Midlands), 'SubLoc', 'Source' (Website), 'CandNo' (00000419), 'HomeCity', 'Sector' (Prime Sector), 'SubSector' (Accountancy), 'Clearances', and 'Langs'. There are also checkboxes for 'Newsletter', 'HotList', 'Restricted', and 'Email'. A red arrow points to the 'Sector' field.

Where a label e.g. Location is blue, it means you can choose an option from a menu.

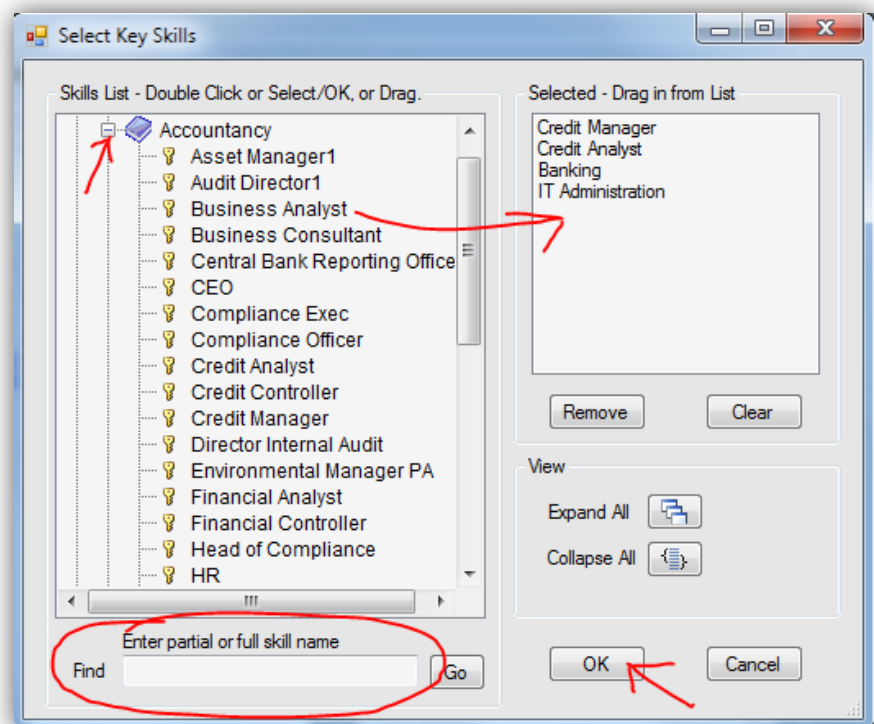
4. If you know of any key skills relating to the candidate you can enter them manually. On the key skills panel, click the key icon...



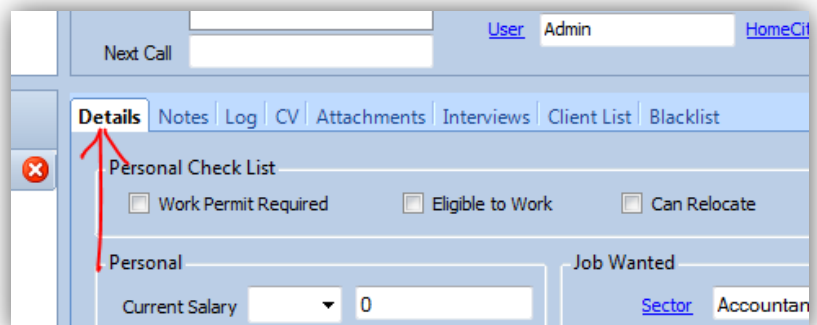
5. Look through your appropriate lists and drag any skills that are relevant over to the 'Selected' panel.

Alternatively search for skills using the search box at the bottom of the window.

Click 'Ok' when finished and the skills will be added to the Key Skills panel.



6. Move to the 'Details' tab in the main part of the record and fill in as much info as you can.



7. Many of these fields can be populated from menu choices (where the label is a blue button) or they are easy to fill in such as NI numbers.

Details | Notes | Log | CV | Attachments | Interviews | Client List | Blacklist

Personal Check List  
 Work Permit Required  Eligible to Work  Can Relocate  Can Work Abroad  Driving Licence  Contractor

Personal  
Current Salary UK£ 40000  
Date/Salary January 2013  
Bonus Car  
Nationality English  
Nationality2  
Social/NI JP123456A  
ISS  
DoB/Age Not Entered  
Notice 3 Months  
Availability  
Avail Status April  
RS Ref 605034-5326-1331  
[References](#) [Bank](#)

Job Wanted  
Sector Accountancy  
SubSector  
Position Network Manager  
Job Type Permanent  
Location Wanted West Midlands  
Salary Req'd UK£ 50000  
Benefits Car  
Pension

Placed  
Start Date  
Start Salary  
PayRollNo  
Placement Notes

Job Check List  
 Refs Checked  Placed

8. You may like to make some notes on the candidate in the 'Notes' tab.

*Enter a date/time/user stamp on the notes by right-clicking and choose from the menu.*

Next Call

Details | **Notes** | Log | CV | Attachments | Interviews | Client List | Blacklist

31 Jan 2013 15:59 Admin:  
General notes and comments on the candidate go here.

9. When you have finished populating the record as much as you can, close it and answer 'Yes' to the question about saving the changes.

Close Contact

Do you want to save changes to Peter Parker?

Yes No Cancel