This tutorial is intended for anyone who wants to learn how to put a candidate forward for a vacancy. The reason for doing this is that you can track the progress of the candidate against the vacancy and do further functions such as set up an interview, email the CV to the client and update all the relevant logs.

You might like to follow up this video with learning how to email the CV to the client from the Client List tab.

But for now let's concentrate on shortlisting the candidate. All of this is done in the Candidate record, so let's open one now.

Go to the clients list tab.

What you need to do now is drag a vacancy into this form. So firstly find it using the quick search panel…

And drag it into the Client list. You can add as many vacancies as you wish to the list. Unfortunately my screen doesn't show this very clearly so I will drag in another vacancy. The entries tell you the name of the company, client and the vacancy job title as well as the date that the CV was sent if this is applicable.

By adding a vacancy to the candidate record you are now able to do more functions such as email the CV to the client or arrange interviews.