How do I make a placement and close a vacancy?

In this tutorial you will learn how to make a placement when the time comes, and how to close the vacancy to make it inactive in Recruit Studio.

The action of making a placement will have the effect of putting an entry in the Placements page on the main menu. From here you will be able to see all the information necessary for raising an invoice, which you do outside of Recruit Studio. When the candidate has started the job and the fee paid, you would be advised to close the vacancy, thus taking it off your list of active vacancies. Making it closed does not remove it from Recruit Studio – you can still access it again, and you can reactivate it if you wish.

To start off, open the vacancy that you are working on. Go to the Candidates tab and select the successful candidate. On the blue panel, click the ‘Placed’ button to register that this candidate will be filling this vacancy.

In the pop up window you can set a start date and choose which options you want to apply. As you can see most have been selected by default, they mostly centre around making log entries so you probably want to leave those ticked. You may wish to untick ‘Set Vacancy to Closed’. Closing the vacancy at this stage will make it less easy to find, and some users prefer to keep it classed as open until the candidate has started or until the fee is paid. This is entirely up to you. So you could untick this box and I will show you shortly how to close it by another method.

So click ‘Ok’ and close the vacancy record, saving the changes.

If you now go to Placements on the main menu, you can see that the placement is listed and you can see various details that will all help towards raising an invoice when you are ready. There are various options at the top of the screen for selecting different consultants and so on.

Let’s now imagine that the candidate has started their new job and the invoice has been paid, or at whatever point you choose, you will want to close the vacancy to make it inactive if you have not already done so when you made the placement. This is not simply a case of changing the vacancy status on the record – Recruit Studio does not know what word you are using for ‘inactive’ in your status menu, your menu may not be in English for a start.

So instead, we have a button for you to click. And that button is on the vacancy record so you firstly need to open the record, and then you’ll find the button on the Actions panel on the far left of the screen. It’s called ‘Current >< Closed’. If you click this, you are asked for confirmation – click ‘Yes’ and then notice how the status has changed at the top of the record. It now says ‘Closed’ and if you look in the log, you’ll see that a log entry has been made.

When you close and save the record, the vacancy will no longer appear in your list of active vacancies. To find it again you need to click ‘Vacancies’ on the main menu and then change the scope by clicking the ‘Company’ button at the top of the panel. From the menu select ‘All or My Closed Vacancies’ and you can access it.

The ‘Current >< Closed’ button works both ways, so if you want to reopen the vacancy in the future, simply click this button again and it will revert to being active once more.