intelligence Cheat Sheet: Adding & Editing A Candidate
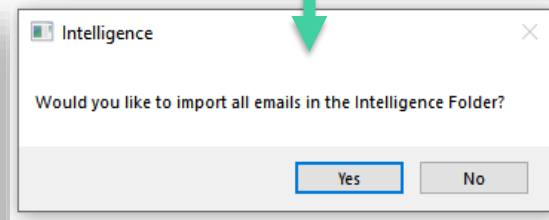
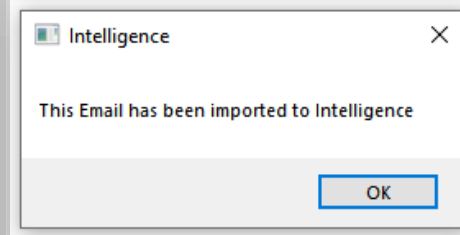intelligence

ADD A NEW CANDIDATE FROM OUTLOOK

1. Open the email with a CV attached, and click on Add-ins on the menu. Select "Add this email to Intelligence".
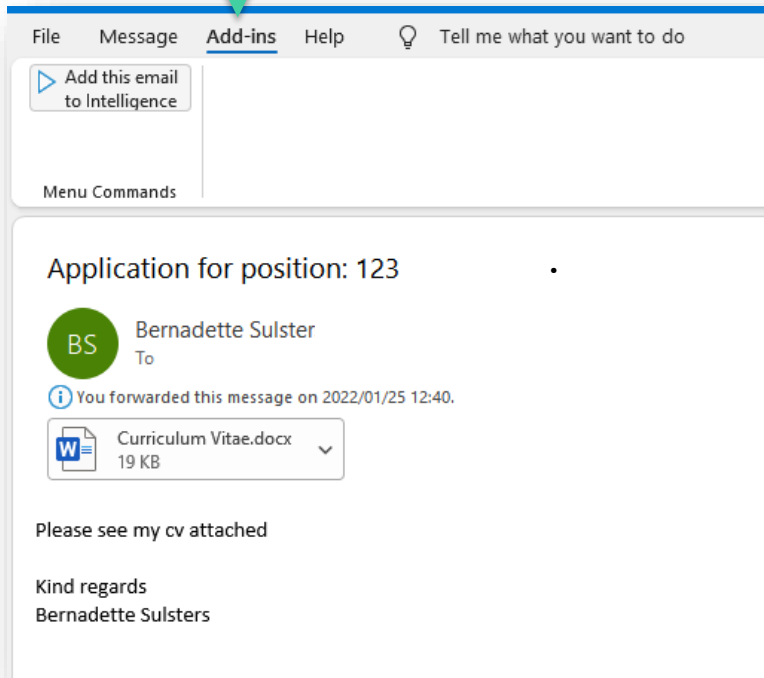
2. You can add multiple emails using this same method – but first create a folder named "Intelligence" and move the emails to this folder.

You will be prompted to import all emails in this folder when you select "Add this email to Intelligence".

Files

Bernadette Sulsters

Reg: 0 days   78 579

New

Jobs

Employment/Education History   Search   Vacancies

Diary

Original CV

Reports

| File | Message | Add-ins | Help | Tell me what you want to do |

Add this email to Intelligence

Menu Commands

Application for position: 123

BS   Bernadette Sulster
     To

(i) You forwarded this message on 2022/01/25 12:40.

Curriculum Vitae.docx
19 KB

Please see my cv attached

Kind regards
Bernadette Sulsters

Intelligence   ✕

Would you like to import all emails in the Intelligence Folder?

Yes   No

3. You will be notified once the upload is complete

Intelligence   ✕

This Email has been imported to Intelligence

OK

4. The candidate's profile will be captured in Intelligence with the name and contact details, and with the CV attached. The Original CV icon will turn YELLOW when there is a saved document present.

You can now add more details to the candidate profile from either LinkedIn or from the original CV saved in Intelligence.

TIP: If the candidate isn't on the database already, this is the great way to add a CV to Intelligence.

Intelligence checks for a matching record by name and email address, so if the candidate is already on the database, the Add-in button will only record the body of the email into Communications, and add any attachments to Files.

intelligence

ADD A NEW CANDIDATE FROM LINKEDIN

1. Open a profile in LinkedIn & select the Intelligence icon on the menu to import to Intelligence.

2. Go to the imported record in Intelligence:

- click into the name field

- type in what you are looking for (name, email, mobile number or South African ID)

- select the required record from the results to see the profile
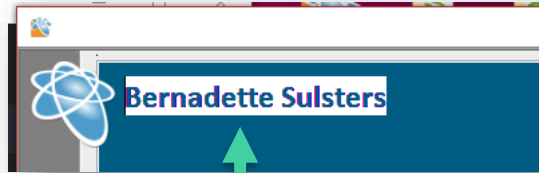
3. The candidate's full profile is imported from LinkedIn with 1 click and will be automatically kept up-to-date to match their LinkedIn details going forward.

ADD A NEW CANDIDATE FROM YOUR PC

Bernadette Sulsters

shane|

Bernadette_Sulsters
South Africa
Go to a candidate record.
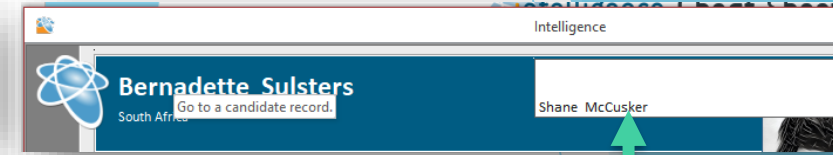Shane McCusker

1. CHECK if the candidate is recorded in Intelligence

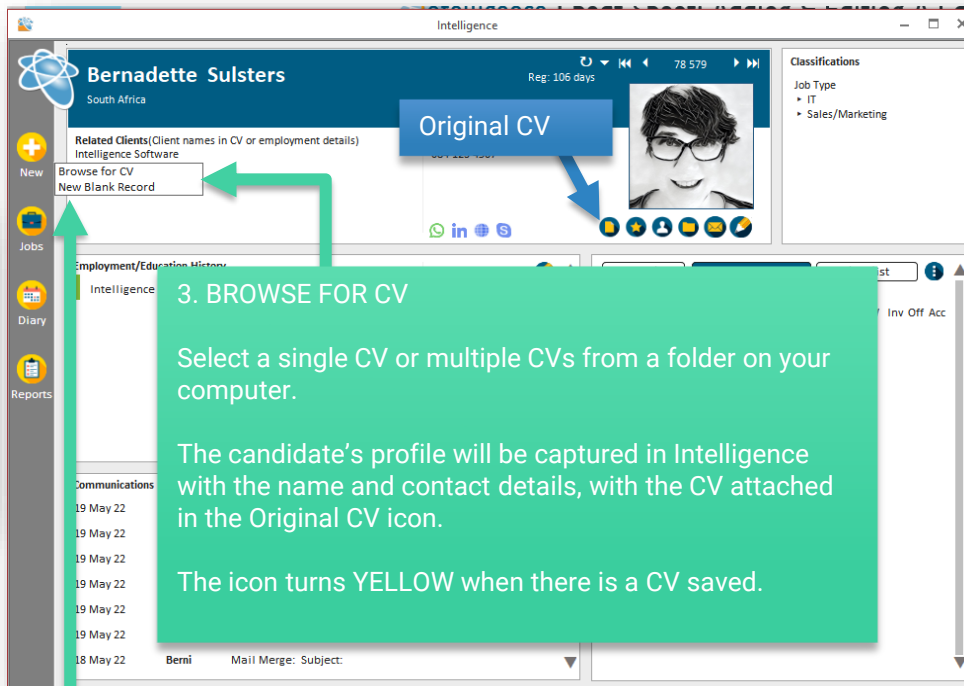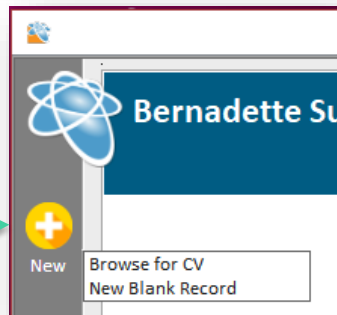**1a. click into the name field**

1b. type in what you are looking for (name, email, mobile number or South African ID) and press Enter on your keyboard

1c. select the required record from the results

2. If the candidate is not yet recorded on Intelligence, click on NEW and select one of the available options.

Bernadette Su
New
Browse for CV
New Blank Record

Bernadette Sulsters
South Africa
Reg: 106 days   78 579
Classifications
Job Type
▸ IT
▸ Sales/Marketing

Related Clients(Client names in CV or employment details)
Intelligence Software

New
Browse for CV
New Blank Record

Original CV

Jobs

Diary

Reports

Employment/Education History
Intelligence

Communications
19 May 22
19 May 22
19 May 22
19 May 22
19 May 22
19 May 22
18 May 22
Berni   Mail Merge: Subject:
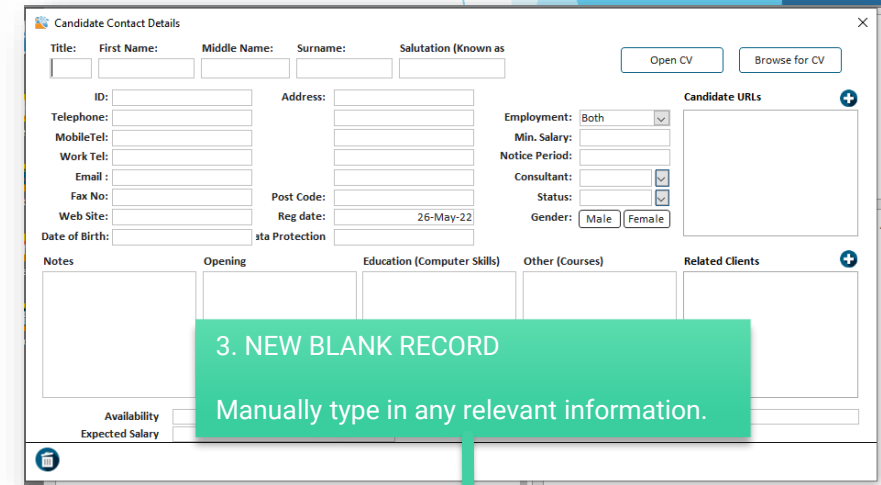
Inv Off Acc

3. BROWSE FOR CV

Select a single CV or multiple CVs from a folder on your computer.

The candidate's profile will be captured in Intelligence with the name and contact details, with the CV attached in the Original CV icon.

The icon turns YELLOW when there is a CV saved.

Candidate Contact Details
Title: First Name: Middle Name: Surname: Salutation (Known as
ID: Address:
Telephone: Employment: Both
MobileTel: Min. Salary:
Work Tel: Notice Period:
Email :   Consultant:
Fax No: Post Code: Status:
Web Site: Reg date: Gender: Male Female
Date of Birth: 26-May-22   Data Protection
Open CV   Browse for CV
Candidate URLs
Notes   Opening   Education (Computer Skills)   Other (Courses)   Related Clients
Availability
Expected Salary

3. NEW BLANK RECORD

Manually type in any relevant information.

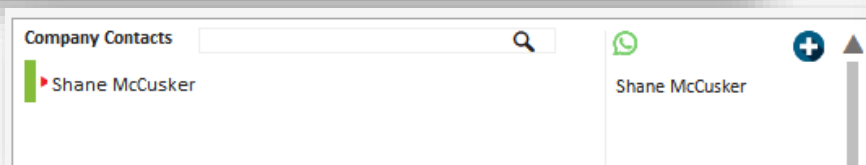intelligence

ADD A NEW CANDIDATE FROM A COMPANY CONTACT

1. From a Client page, right click on a Company Contact to add them as a CANDIDATE.
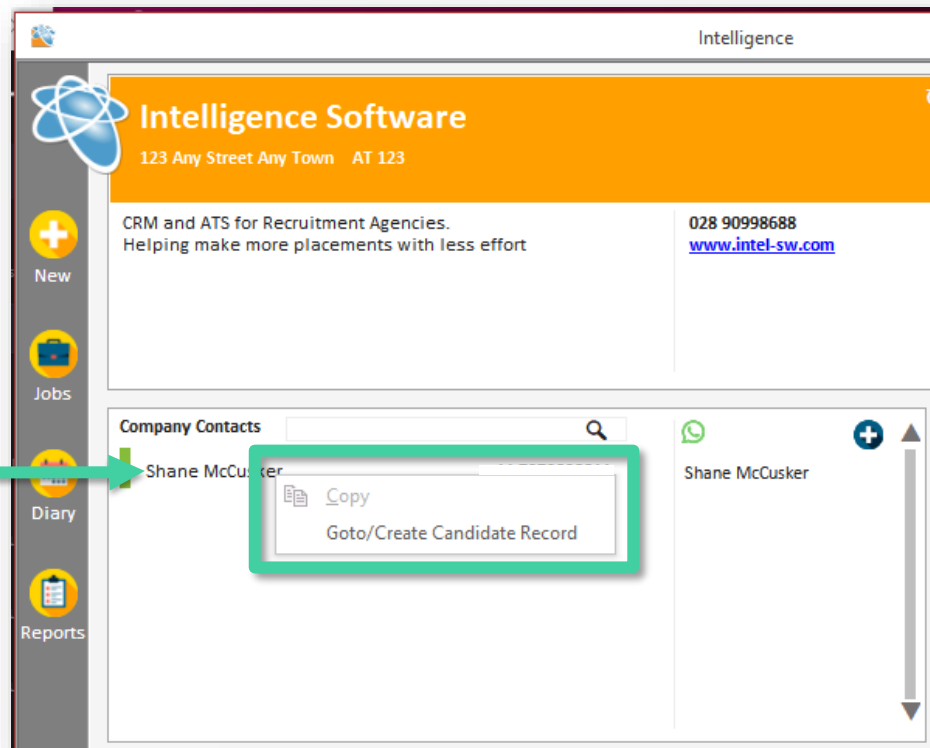
2. The company contact's profile will be captured in Intelligence with the name and contact details, including the client name in the employment section.

Intelligence Software
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Helping make more placements with less effort

028 90998688
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New
Jobs
Diary
Reports

Company Contacts

Shane McCusker

Copy
Goto/Create Candidate Record

Shane McCusker

Shane McCusker
Reg: 0 days

Related Clients (Client names in CV or employment details)
Intelligence Software

Employment/Education History
Intelligence Software   -

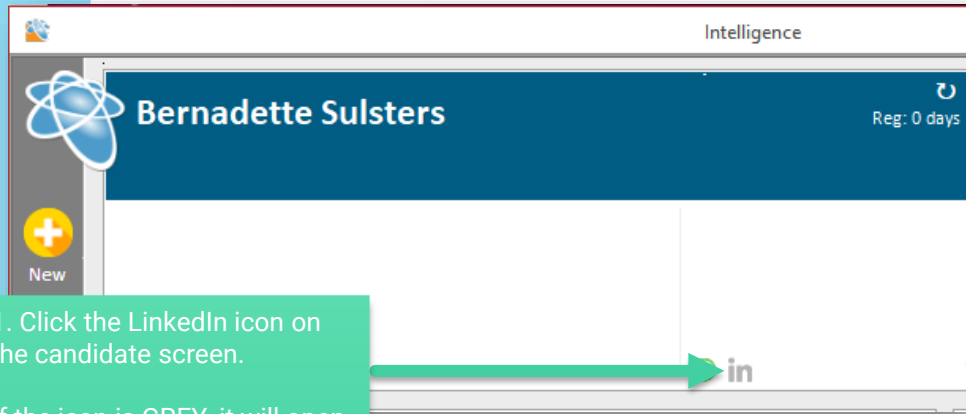Company Contacts

Shane McCusker

Shane McCusker

3. The company contact record in the Client screen now shows a **RED ARROW** next to the person's name, indicating that they are also recorded as a CANDIDATE.

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intelligence Cheat Sheet: Adding & Editing A Candidate

UPDATE A CANDIDATE FROM LINKEDIN

Intelligence
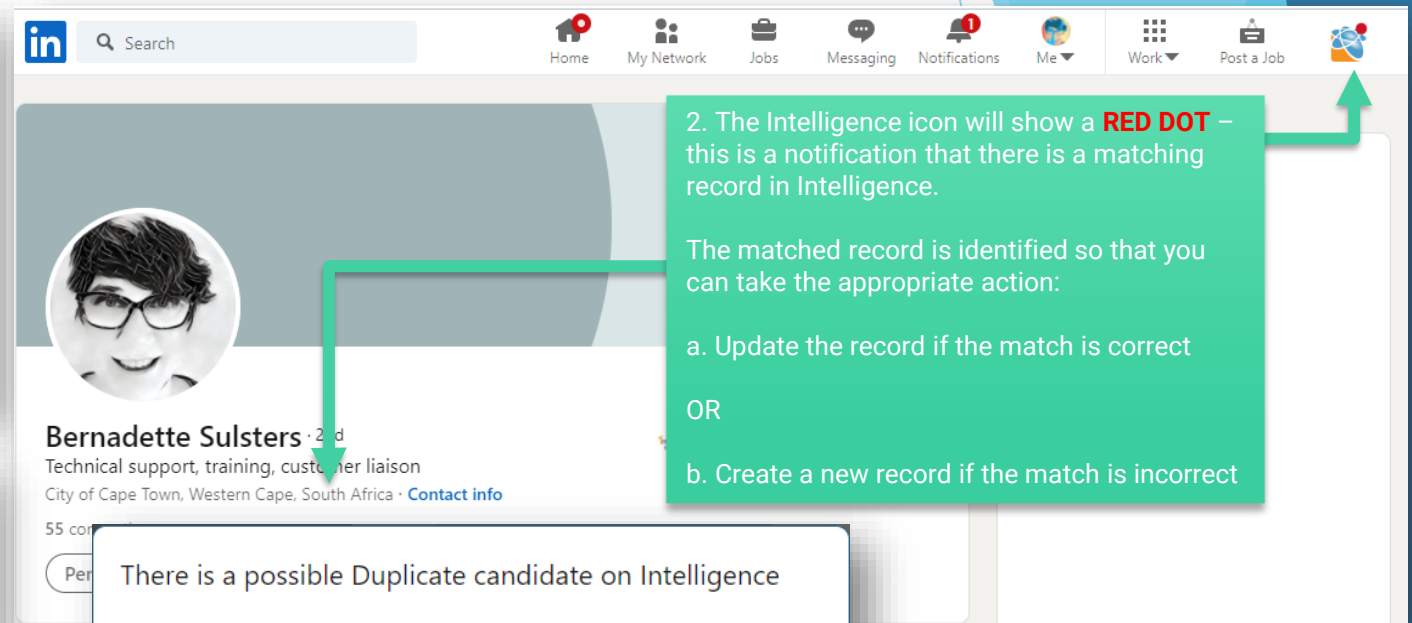
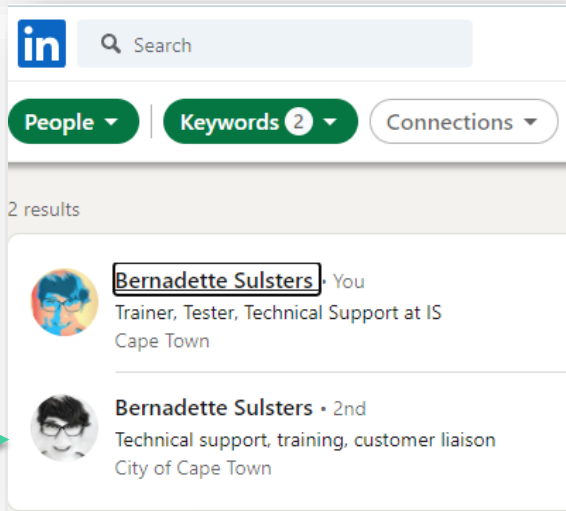**Bernadette Sulsters**

Reg: 0 days

New

1. Click the LinkedIn icon on the candidate screen.

If the icon is GREY, it will open the LinkedIn search for any profile matched by name.

Select the appropriate record to go to that profile.

If the LinkedIn is BLUE, then it will open to the saved LinkedIn profile.

in Q Search

People ▾   Keywords 2 ▾   Connections ▾

2 results

Bernadette Sulsters · You
Trainer, Tester, Technical Support at IS
Cape Town

Bernadette Sulsters · 2nd
Technical support, training, customer liaison
City of Cape Town

in   Q Search

Home   My Network   Jobs   Messaging   Notifications   Me ▾   Work ▾   Post a Job

Bernadette Sulsters · 2nd
Technical support, training, customer liaison
City of Cape Town, Western Cape, South Africa · Contact info
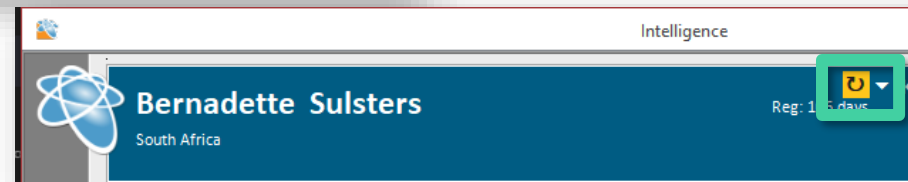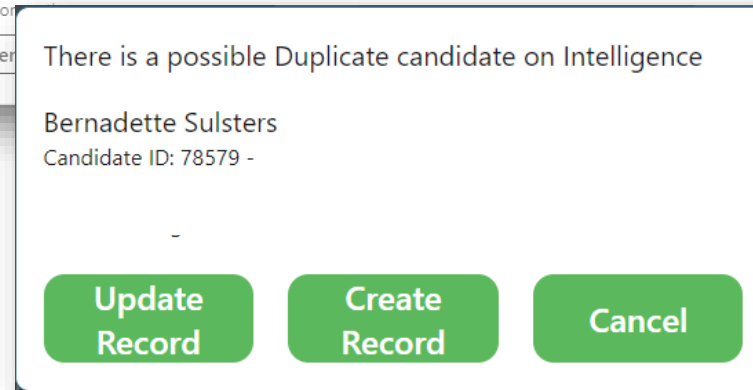
55 con

Per

2. The Intelligence icon will show a **RED DOT** – this is a notification that there is a matching record in Intelligence.

The matched record is identified so that you can take the appropriate action:

a. Update the record if the match is correct

OR

b. Create a new record if the match is incorrect

There is a possible Duplicate candidate on Intelligence

Bernadette Sulsters
Candidate ID: 78579 -

Update Record   **Create Record**   **Cancel**

Intelligence

Bernadette Sulsters
South Africa

Reg: 1 6 days

3. Remember to RELOAD the candidate record in Intelligence to see the updated profile.

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UPDATE A CANDIDATE FROM THE ORIGINAL CV

1. Open the document from the Original CV icon.

The icon is YELLOW when there is a CV saved.

2. Highlight the required text on the Word CV and select the button *NEXT* to the required field to import the information.

See the example below: highlight **2008** and add it to the **Start Date**

You can add any information from the CV to the profile – each tab has different options for Details, Notes, Work, Education and References.

Intelligence

Bernadette Sulsters

South Africa

Reg: 0 days   78 579

Notes
Technical support, training, customer liaison

Related Clients(Client names in CV or employment details)
Intelligence Software

Original CV

New

Jobs

Diary

Reports

Employment/Education History

Intelligence Software   Technical Support, Trainer, (Apr 08 -

Search   Vacancie

Save   Off   Can78579.docx   Search (Alt+Q)   B Sulsters

ome   Insert   Draw   Design   La   ut   References   Mailings   Review   View   Help   Table Design   Layout   Com

Curriculum Vitae - Bernadette Sulsters

Recent Experience:

Company   Intelligence Software
Title   Client Management & Technical Support
Duration   2008 to Current

Duties

Anything and everything

Intelligence

Details | Notes | Work | Education | Reference

of 1

Dates

Employer   Intelligence Software

Position

Duties

Reports to

intelligence

UPDATE & REPLACE A CANDIDATE'S CV

1. Click on the Edit button (the pencil icon) to open the Candidate Contact Details

2. BROWSE FOR CV: Select the new CV from a folder on your computer.

3. OPEN CV: Copy the contents from the new CV and paste into the existing CV. You will prompted to save the document on close.

CLASSIFY A CANDIDATE

You can classify your candidates so that you can filter by these options during searches. Classifications are set up by **YOU** to ensure you have full control on your own database.

1. Double click in the white space in the classifications section to open the form.

2. Select the relevant classification from the LEFT and your selection will show on the RIGHT.

You can select multiple classifications, if required.

Simply untick / click on the x to remove a classification for this candidate's profile.

You can also search for specific classification – simply type in the text in the top left field.

3. Close the form to see the candidate's record display this new information.

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FORMATTING THE CV

You can format the CV quickly and easily, so that with minimal editing it can be sent to a client.

2. The document is generated in Word so that it is editable. You may wish to check that you are happy with it and edit as necessary. Close the document and save it when prompted. This will upload the Formatted CV into the STAR icon, and changes the colour of the icon to YELLOW to indicate that the document is present.

Bernadette Sulsters
South Africa

Reg: 0 days
78 579

Notes
Technical sup

Related Clients(Client names in CV
Intelligence Software

1. Click on the STAR icon to generate a Formatted CV from any number of pre-set templates.

Files

Format CV Template

Select the template to use.

Normal Template
FormatCV fullCV
FormatCV SmartArt
FormatCV Profile1
FormatCV Profile2
FormatCV S
FormatCV D1
FormatCV D2
FormatCV RP

Formatted CV

Employment/Education History

Intelligence Software

New
Jobs
Diary
Reports

Search   Vacancie

AutoSave Off   FCan78579....   B Sulsters

File   Home   Insert   Draw   Design   Layout   References   Mailings   Review   View   Help

yourcompanlogo
TAGLINE

Bernadette Sulsters

Work History:

FCan78579.doc - Compatibility Mode • Saved to this PC   B Sulsters

C: > IntelligenceMySQL > CVs

FCan78579

Word 97-2003 Document (*.doc)   Save

Word Document (*.docx)
Word Macro-Enabled Document (*.docm)
Word 97-2003 Document (*.doc)
Word Template (*.dotx)
Word Macro-Enabled Template (*.dotm)
Word 97-2003 Template (*.dot)
PDF (*.pdf)

3. If you prefer to send a PDF Formatted CV to your client, go to *File>Save As* before you close the document and simply change the filetype to PDF. This will load the PDF copy to the Files section.

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UPLOADING FILES

You can upload any number of other documents to a candidate's profile – e.g. payslips, ID, certificates etc.

Bernadette Sulsters
South Africa

Reg: 0 days

78 579

Notes
Technical support, training, customer liaison

Related Clients(Client names in CV or employment details)
Intelligence Software

Files

Classifications

Job Type
▸ IT
▸ Sales/Marketing

New

Jobs

2. Click on the PLUS button to add new files from:

Blank Word Document
Browse for a File
Create a file from a Template

TIP:
You can select multiple files to upload at one time.

1. Click on the FOLDER icon to open the Files section. Remember that if the icon is YELLOW, it indicates that there are documents saved here.

3. Click on the EDIT button to:

Open File
Save file to Disk
Edit Note
Rename File

Attached Documents

FileName   Notes
02_09_15_53_CV.pdf

4. If you've saved the Formatted CV in PDF format, it will save as *[timestamp]_CV.pdf*

You can rename this to something more descriptive from the Edit button.

5. Delete any selected document by clicking on the DELETE icon.

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DELETE A CANDIDATE

Bernadette Sulsters
South Africa

Reg: 0 days   78 579

Notes
Technical support, training, customer liaison

bs1234567@gmail.com
084 123 4567

Related Clients(Client names in CV or employment details)
Intelligence Software

New

Jobs

Diary

Reports

Employment/Education History

Intelligence Software   Technical Support, Trainer, (Apr 08 -

Search   Vacancie

1. Double click anywhere in the white space, or click on the Edit button (the pencil icon) to open the Candidate Contact Details.

The DELETE icon is at the BOTTTOM LEFT of the form.

e Contact Details

First Name: Middle Name: Surname: Salutation (Known as

Bernadette   **Sulsters**

Open CV   Browse for CV

D: Address: Employment: Both

e: Min. Salary:

el: 084 123 4567   Notice Period:

South Africa   Consultant:

bs1234567@gmail.com   Post Code: Status:

Reg date: 09-Feb-22   Gender: Male Female

ata Protection

Candidate URLs
http://www.intel-sw.com
https://www.linkedin.com/in/berr

Opening   Education (Computer Skills)   Other (Courses)   **Related Clients**
Intelligence Software

support,
ustomer liaison

Notice Period
Expected Salary
LinkedIn URL
Nationality number
Drivers Licence Date
Date of Birth

2. You will be prompted to input your LOGIN password to delete a record.

3. You have 2 delete options – please read the Warning to decide which option you want to use.
* Personal Data is defined as all employment, education and communication history, all documents including the CV and Formatted CV, notes and any classifications marked as Personal.
* Personal Data is NOT defined as name, email, mobile or ID.

Intelligence

Warning

You are about to delete this Candidate record.

Click**Cancel** if you do not want to do this. Alternatively you can either **Fully Delete this Record**, which will remove it completely. Or you can **Remove all Personal Data** which will delete all data other than non personal data or data required to uniquely identify this record in the future.

To confirm you wish to Remove or Delete data, please enter your login Password below.

Cancel   Remove Personal Data   Fully Delete Record

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