Progress

Adding a candidate to a vacancy short list creates a progress form which tracks candidate progress through the vacancy stages, from being added to the shortlist to being placed or rejected. See also Progress States

From a vacancy shortlist select the candidate name and use the Expand button to open the progress form. Can also be accessed from progress within the candidate record.

Progress contact events can be made which link to candidate, client and vacancy records.

Interview notes and details are stored on the progress form.

Action dates can be set to ensure their progress is followed up - progress due for action is shown in the desktop. See also Progress due for action

The current progress state and action date is shown in the vacancy short list view and as the default on the progress line within the selector and person progress views. Progress history is saved in the history

The progress selector form shows all progress and can be filtered by various criteria such as Consultant (by default shows the progress for the user that is logged in), Action Date range, State and as well as more detailed criteria relating to the company, candidate vacancy etc - go to Filter, Criteria and select the relevant criteria and apply.

From the selection, the process buttons can be used to take the Candidates, Companies, Contacts or Vacancies into a list in their relevant selector form.

There are reports than can be run from the progress selector form, see Progress Reports

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