ACTIVITIES MODULE

INSTRUCTION MANUAL

OTYS Recruiting Technology

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1 | INTRODUCTION

1.1 ABOUT THE ACTIVITIES MODULE

The Activities module makes it easy for you to keep track of ongoing actions with prospects and clients, and gain insight into which activities generate conversions and which generate genuine leads. With the Activities module you have a clear, immediate overview of the ongoing activities that need following up. An example of an activity is periodically approaching a prospect to eventually fill a vacancy. The Activities module shows how many activities you have planned for a certain period of time, and the exact nature of the actions you need to execute. Thanks to this module you keep track of ongoing actions, so you don't forget any commitments made.

1.2 INSTRUCTION OBJECTIVE

These instructions are intended for OTYS clients, to enable them to use and configure the Activities module in OTYS Go!

1.3 INSTRUCTION STRUCTURE

After this introduction we will explain the available functions and possible actions you can execute in the Activities module:

- Basic functions
- Create activities
- Configure activities

2 | BASIC FUNCTIONS

2.1 SEARCH AND FILTER

To be able to find the right activity in your system you can use the extensive OTYS filter and search functionality. The Search functionality is located in the right panel of your screen. Here you can add multiple criteria to get the right result. If you want to use this combination of search criteria again, you can save the search as a filter. The filter can then be found in the left panel of the screen and allows you to execute your saved search again at a later time with one click. How these functions can be best used is described in the instruction manual 'Lists, search & match'. We decided to describe this functionality in a separate instruction manual because its operation is the same for multiple modules in OTYS.

2.2 CREATE NEW ACTIVITY

You create a new activity from the overview screen of the Activities module.

1. Click the green '+' symbol at the top of your screen.
2. A new window will open where you can enter the details of the activity. Chapter 5 describes how to do this.
3. The new activity will automatically be created. You close the window with the cross in the top right corner.

An activity can also be created directly from a relation or from a contact in the CRM module. Since the creation of activities is possible in both the Activities module and the CRM module, you can quickly match activities to a company or contact. In addition, a number of fields such as CRM criteria and Match criteria in the activity are automatically completed (depending on what is entered in the CRM), which saves you extra work.

3 | ENTER ACTIVITY DETAILS

3.1 MANAGE RECURRING ACTIVITIES

Recurring actions for a relation can be easily managed in the Activities module. An activity is divided over three tabs in OTYS Go!:

- General
- Leads
- Vacancies

The activity is thus a targeted action in which all the information that a user should follow is present. Briefly, this may occur as follows in practice:

The activity 'Approach every six months' matched to relation 'OTYS Recruiting Technology', contact 'James' and user 'Quentin' indicates that Quentin should contact James at OTYS and repeat this every six months. When Quentin opens the activity he sees all data related to James that was entered in his CRM system. Next, Quentin calls or emails James, and he ensures that the activity is up to date as a result of the contact. The activity will only be visible again in Quentin's list of activities when action has to be taken again.

In the remainder of this chapter we will explain how to create an activity in OTYS Go!.

3.2 DETAIL VIEW 'GENERAL'

The header 'General' is used for the description of the activity and to describe the prospect/client. This gives you instant access to all relevant information on one screen.

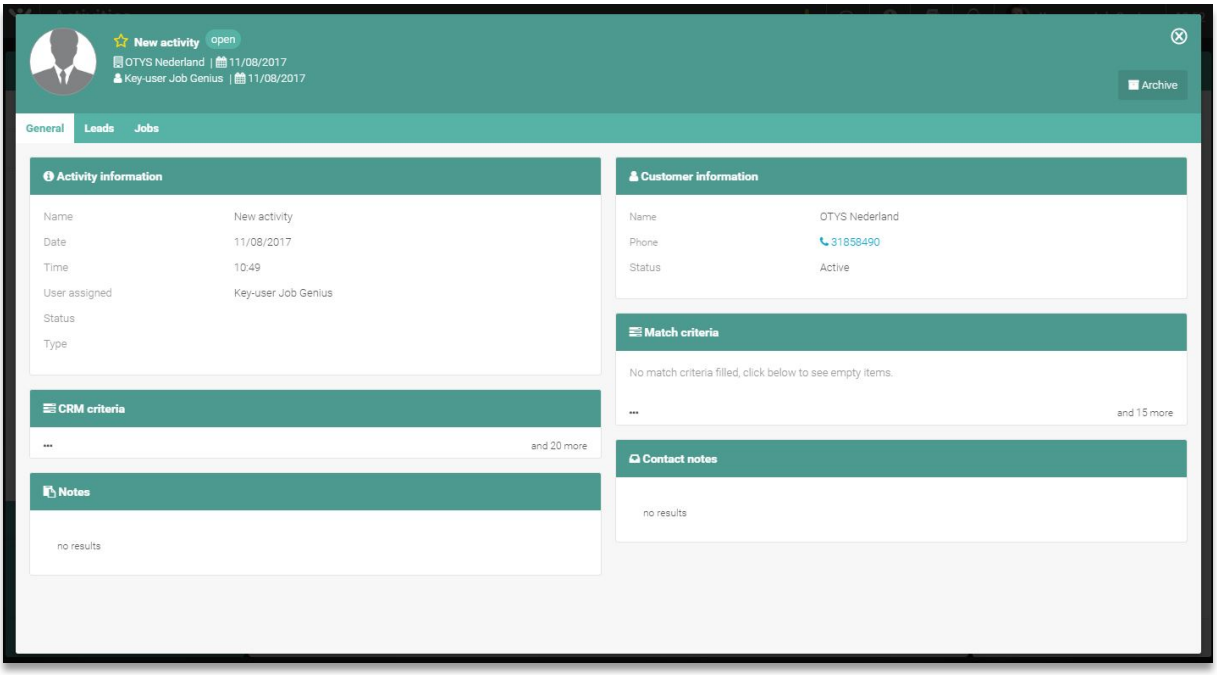

Fig. 1 - Add general information to an activity.

3.2.1 ACTIVITY INFORMATION

Use this field to describe the general information regarding the activity.

- Name
  Give the activity a name such as 'Approach periodically'.
- Date
  Specify the date when the activity should be followed up. The activity will move up in the overview screen of the Activities module as the date approaches.
- Time
  Same function as 'Date' only specify here what time an activity must be followed up.
- Assigned user
  Assign a user to the activity. This is set to your own name by default.
- Status
  Give the activity a chosen status.
- Reminder
  Tick the box if you want to receive a reminder of the activity.

3.2.2 CRM CRITERIA

You can access the CRM criteria of the company that is matched to the activity via the tab 'CRM criteria'. In this way the data will immediately be visible and can be updated when necessary. If the criteria are updated from the activity, the matched relation will also immediately be updated.

3.2.3 GENERAL NOTES

The header 'General notes' features a free entry field where you can enter notes.

1. Click the plus sign that appears when you hover your cursor over the bar 'General notes'.
2. Type your note in the text field.
3. Click Save to save or Cancel to delete the note.

Previously entered notes can be edited by moving your cursor over the note and clicking on the pencil.

3.2.4 CLIENT INFORMATION

With the header 'Client information' you can add the details of the relation to which you want to link the activity. The addition of client information takes place in the following way:

1. Click on in the bar in the top right corner.
2. A new window will open. Click 'Search relation', enter the name of the relation and press enter.
3. Select the relation. The data at 'Client information' will be completed automatically, depending on what you entered in your CRM.
4. Give the relation a status so you can recognise immediately whether it is a client or prospect, for example.
5. Click on the disk to save the changes or on the cross to cancel.

3.2.5 MATCH CRITERIA

You can access the match criteria of the company that is linked to the activity via the tab 'Match criteria'. In this way the data will immediately be visible and can be updated when necessary. If the criteria are updated from the activity, the matched relation will also immediately be updated.

3.2.6 CONTACT NOTES

Use this field to add notes to a contact. The contact information is linked to your system. Adding notes per contact allows you to set highly targeted activities for specific individuals. This prevents actions being undertaken with the wrong people, which could mean a delay in your work. Before you can add a note, you must first select a contact. Adding a contact is done as follows:

1. Click the plus sign that will appear when you hover your cursor over the bar 'Contact notes'.
2. The screen 'Select relations' will open. Click 'Search for relations' to search for a relation, select the appropriate relation and then search for the appropriate contact.
3. The data is automatically completed.

The contact name will appear on the screen as a shortcut to your CRM module. You will arrive here by clicking . All functions of the CRM module and their explanation can be found in the CRM module instruction manual.

Behind the name of the contact you will see two symbols. You can create or delete a note via these symbols.

Create note

1. Click on the 'New blank document' icon to create a new note.
2. An open text field will appear below the name of the contact. Enter your note here.
3. Click 'Save' to save the note or 'Cancel' to return.

Delete note

A note can be deleted immediately by clicking on the trash can.

Edit note

You can edit an already created note by moving your cursor over the note and clicking on the pencil that will appear.

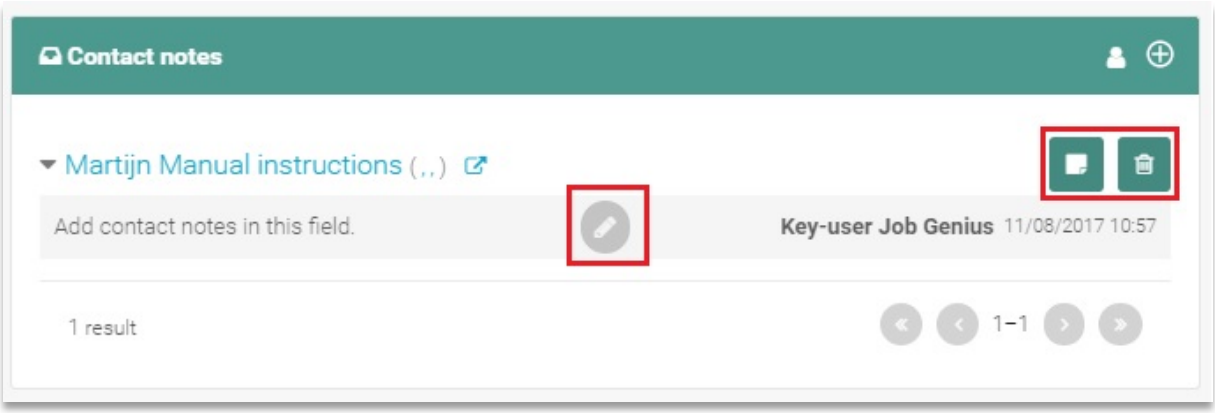

Fig. 2 – Create, delete and edit contact notes.

3.3 LEADS

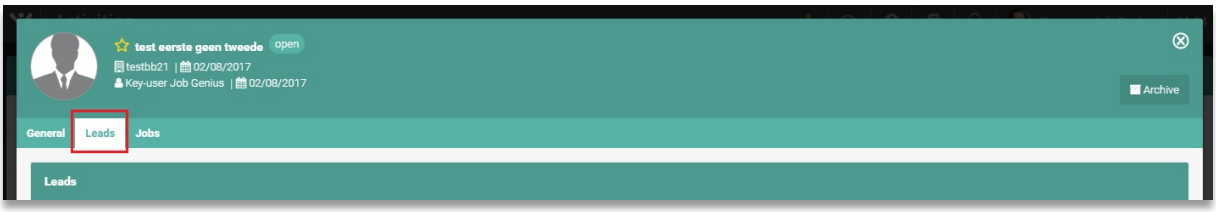

Fig. 3 – Overview of leads matched to an activity.

In the tab Leads you will see an overview of the leads of the company linked to the activity. More information about this functionality can be found in our Sales module instruction manual.

3.4 VACANCIES

You can see the vacancies that have been created for the linked relation via the tab 'Vacancies'. The vacancies can be loaded via:

- Empty vacancy
- From the profile

How to apply both methods can be studied in detail in the Vacancies module instruction manual.

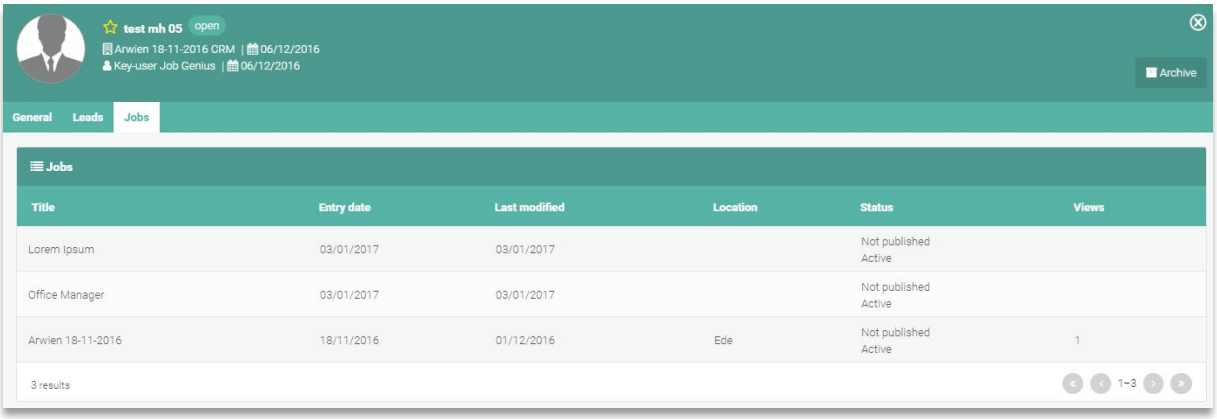

Fig. 4 – View of vacancies linked to the activity.

3.5 END ACTIVITY

It may happen that you want to remove an activity completely from your list, for example, when the relation is no longer a client. To close an activity, proceed as follows:

1. Open the activity that you want to remove from your list.
2. Click in the top right corner on 'Archive'.
3. You will not be asked for a confirmation. If you want to restore the activity in your list, click on 'De-archive'.

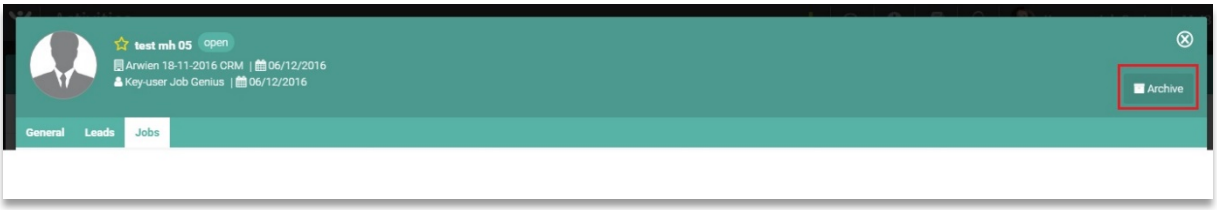

Fig. 5 – End an activity.