CRM MODULE

INSTRUCTION MANUAL

OTYS Recruiting Technology

CONTENT

1 | INTRODUCTION

1.1 ABOUT THE CRM MODULE

With the OTYS CRM module you keep track of all your relations, such as customers, competitors, suppliers and the associated contacts. Since the CRM is the basis for your marketing and sales activities, it is important that the information you enter is both correct and complete. With the CRM module it is easy to create new companies and contacts, to supplement their data and add them, for instance, to an email group.

1.2 PURPOSE OF THIS INSTRUCTION

This instruction manual shows you how to add new companies and contacts to your database. We'll show you how and where to save the available information and how to edit it. Furthermore, we teach you how to execute actions on one and more relations simultaneously.

1.3 INSTRUCTION STRUCTURE

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

- Basic functions
- Add details of a relation
- Execute actions on one relation
- Execute actions on multiple relations simultaneously
- Add a contact's details
- Execute actions on a contact

2 | BASIC FUNCTIONS

2.1   SWITCHING BETWEEN RELATIONS AND CONTACTS

The CRM module consists of two lists, namely relations and contacts. This allows you to take full advantage of the search and filter functionality. At the top of the screen you can switch between these lists by clicking on the Relation icon or the Contact icon. The view will open with the list of relations by default.
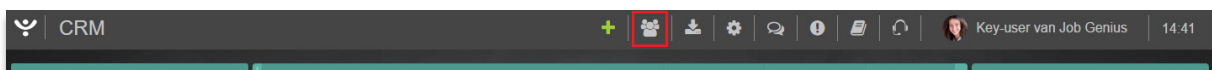

Fig. 1 - Switch between list of relations and list of contacts

2.1   SEARCH AND FILTER

To be able to find the right contacts and relations in your system, you can use the OTYS Go! advanced 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 in Go!'. We decided to describe this functionality in a separate instruction manual because its operation is the same for multiple modules in OTYS Go!

2.2   ADJUST YOUR LIST VIEW

Do you often work with the CRM module and you want to customise the columns of the overview? This can be done by clicking on 'Standard view' at the bottom of your screen. Here you can add, delete and rearrange columns. You simply save your new view for future use. How to leverage this function is described in the instruction manual 'Lists, search & match'.

2.3   CREATE NEW RELATION OR CONTACT

To create a new relation or contact, you click in the list of relations on the green '+' symbol at the top of your screen. You can then immediately start entering the details. We will explain in the next section how you can best do that. A new contact can be created from an existing relation.

Fig. 2 – Create new relation

3 | ADD DETAILS OF A RELATION

After creating a relation, you can immediately start adding the information you have available. The new relation will open in the standard detail view. We have configured this as logically as possible. However, you can organise the layout to your own preference. Perhaps some information is not relevant at all for you, so you can leave it out. While other information, such as the address or financial information, may be very important to you. You can then place that on the first tab at the top as standard. The instruction manual 'Detail views' helps you to optimally set up your own detail screens.

Of course you can also use the default view set by us. It allows you to start immediately. If you are in the detail screen of a relation and hover over the green bar of a widget, a pencil appears in the upper right corner. Click to edit the information in the widget. Then click on the Disc icon in the top right corner to save your changes. This works the same for all widgets.
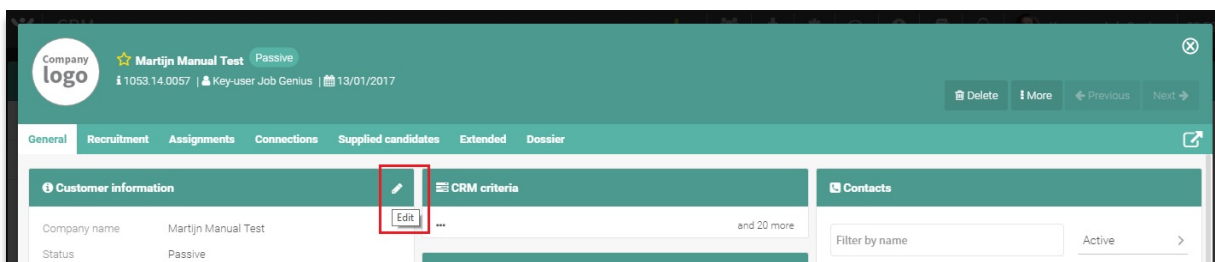

Fig. 3 – Edit relation information

To cover all the relevant relation information, the following widgets are available:

- Supplied candidates
  Here is an overview of all the candidates that this relation has delivered via the supplier portal. This can be used when you use your network for the supply of candidates. You keep an overview with this widget. The data in this widget cannot be adjusted.
- Company profile & culture
  Use the company profile and culture that you add to this widget as standard vacancy text. So you only need to add this information once.
- Relation contacts
  This widget gives you an overview of all contacts within this relation. Here you can also filter and create new contacts. In the next chapter you will learn more about creating a new contact.
- CRM criteria
  Use this widget to enter criteria that you can use at a later date for filtering. The advantage of CRM criteria is that it provides you with fields that are not standard in OTYS. Unlike free text fields, CRM criteria lets you select the criteria from a list. For

example, if you enter '>100 employees' for company size, you can later filter for relations with a company size of more than 100 employees in the list view.

- Dossier

  Here you will find the complete dossier of the relation. All emails, calendar appointments, notes, but also documents as well as CVs are displayed here and can be added here. With filters and keywords you can determine which items are displayed. To leverage the full function of the dossier, it is best to read the instruction manual 'Dossiers'.

- Invoicing settings

  This widget shows billing information from this relation. Here, for example, you can specify whether a relation is a private company. This applies also if you use the Billing module.

- Financial

  This widget allows you to view and edit IBAN, VAT and Chamber of Commerce numbers, among other things. You will also find all the information regarding billing and collection.

- Customer information

  Enter all the basic information about the relation, such as company name, industry, owner of the relation and, possibly, client number.

- Project information

  Enter information about current projects, including project manager, scope and start date.

- Relation activities

  This widget gives an overview of the current activities at this relation and lets you create new activities. Read more about this functionality in the Activities module instruction manual. Via activities you can create a call note and add it to contacts and reminders, for example. The Activities module is designed to support your sales and help with suitable follow-up.

- Relation addresses

  Add all the addresses that are known, such as the main address, other branches, postal address and billing address.

- Relation connections

  If you have specified connections for the contacts matched to this relation, they are displayed here. An example of a connection is a partner who has referred a candidate to you for a certain position.

- Relation match criteria

  Add match criteria to the relation, such as industry and desired number of work hours. If you have entered the same match criteria in Candidates, you can have OTYS automatically match candidates to the right relations. The difference with the CRM criteria is that the relation match criteria are also present in candidates, vacancies and contacts.

- Relation assignments

  Here is a list of all assignments to this relation. Both current and past assignments. This

widget is linked to the Assignments module. More information on this module can be found in the Assignments module instruction manual.

- Text fields
Use the free text fields in this widget for filtering at a later date. The advantage of CRM criteria is that it provides you with fields that are not standard in OTYS. In contrast to the CRM criteria, the text fields can be completed to your liking. This gives you more flexibility, but also a greater risk of error.

- Vacancies list
This widget gives an overview of open vacancies for this relation. You can also create new vacancies here. You can choose to start with a new blank vacancy or from a pre-defined profile. The advantage of the latter is that some details are already completed in advance. Read more about these functionalities in the Vacancies module instruction manual.

- Predefined shifts
When you use the OTYS Schedule module, you can use this widget for shifts, such as night shifts. The Schedule module is linked to this widget. If the company utilises shifts, such as night shift work, enter the appropriate information here.

- Employees
This widget gives an overview of all employees matched to this relation. These are candidates that are matched to this relation in the Candidates module. Find the right candidate with the search bar.

4 | EXECUTE ACTIONS ON ONE RELATION

Besides adding information you can also execute certain actions on the relation. These actions can be found under the buttons in the far top right corner of the detail screen of the relation. Below we will discuss the various buttons and actions.
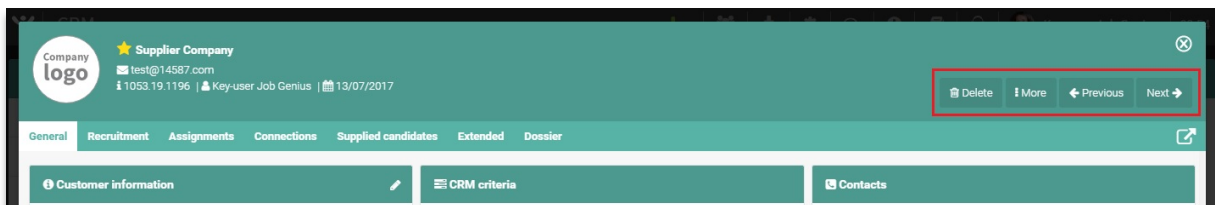

Fig. 4 – Execute actions on a relation

- Delete
  This will delete the entire relation. This means that all contacts, vacancies, email correspondence and documents of this relation will be deleted. The system will first ask for confirmation.
- More
  - Make Google folder
    You may want to store files that relate to your relation on Google Drive. With this button, you can automatically create a folder in Google Drive, specific to this relation.
- Previous
  Jumps to the previous relation in your selection. If you made a selection based on a filter or search, the 'Previous' button will give a different result than when you arrived at this relation from the total overview.
- Next
  This button works the same way as the 'Previous' button. However, you then naturally jump to the next relation in your selection.

Below the described row with action buttons you find the 'Open in new window' button. This is especially useful if you want to quickly open multiple relations next to each other in different tabs in your browser.

5 | EXECUTE ACTIONS ON MULTIPLE RELATIONS SIMULTANEOUSLY

The previously described actions all had effect on one relation, but it can also happen that you want to edit multiple relations. This can be done from the list of relations, of course, both from the overall view as well as from a selection you made on the basis of the filter and search functionality.

1. Select multiple relations via the tick boxes at the beginning of each line.
2. Right-click one of the selected relations to see the available batch actions.
3. The batch action you select will apply to all selected relations.
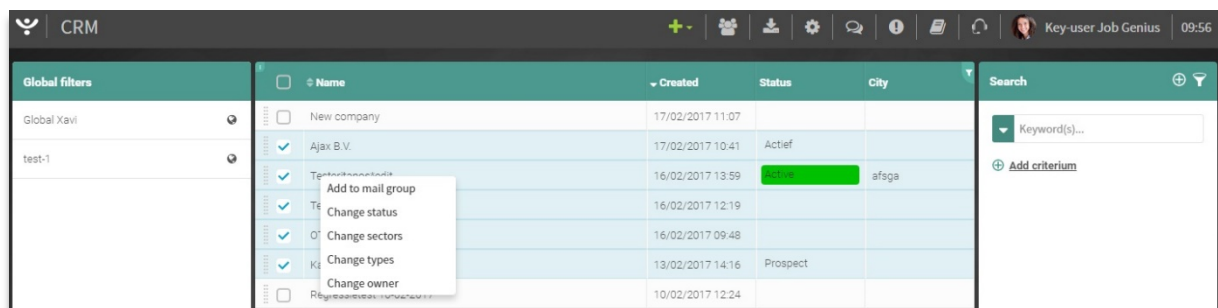

Fig. 5 – Execute actions on multiple relations

The options are:

- Add to email group
  Simultaneously add multiple relations to a previously created email group. For example, a list of those to which you send commercial mailings regularly.
- Change status
  For example, simultaneously change the status from 'Suspect' to 'Prospect' for multiple relations.
- Change sectors
  Assign several relations to an industry at the same time.
- Change types
  By 'Type' we mean categorisations such as 'Supplier', 'Client' or 'Competitor'. You can change the type of multiple relations simultaneously.
- Change owner
  Assign candidates in bulk to a colleague.

6 | ADD A CONTACT'S DETAILS

After creating a contact, you can immediately start adding the information you have available. The new contact will open in the standard detail view. We have configured this as logically as possible. However, you can organise the layout to your own preference. Perhaps some information is not relevant at all for you, so you can leave this out. While other information, such as the ongoing activities or contact details, may be very important to you. You can then place that on the first tab at the top as standard. The instruction manual 'Detail views' helps you to optimally set up your own detail screens.

Of course you can also use the default view set by us. It allows you to start immediately. If you are in the detail screen of a contact and hover over the green bar of a widget, a pencil appears in the upper right corner. Click to edit the information in the widget. Then click on the Disc icon in the top right corner to save your changes. This works the same for all widgets.
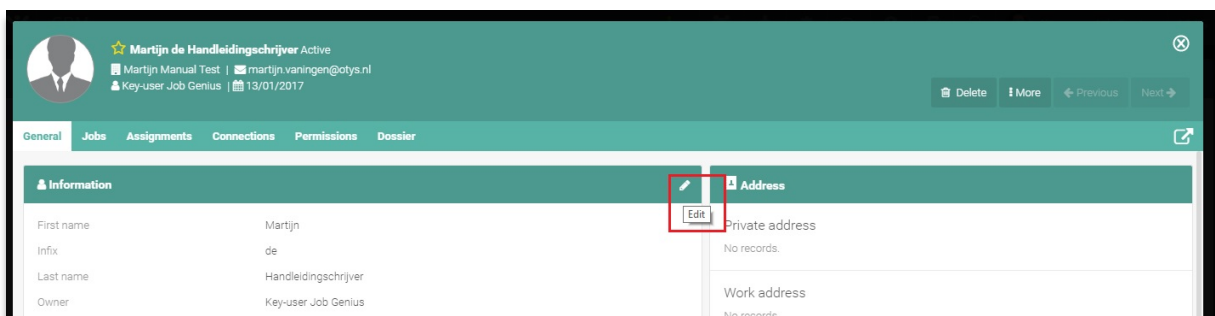

Fig. 6 – Customise your contact information

To cover all the relevant contact information, the following widgets are available:

- Activities list
  This widget gives an overview of the current activities for this contact and lets you create new activities. Read more about this functionality in the Activities module instruction manual. Via activities you can create a call note and add it to contacts and reminders, for example. The Activities module is designed to support your sales and help with suitable follow-up.
- Address
  Add all the addresses that are known for this contact, such as their work and home address.
- Connections lists
  Add this information to gain insight into relations between, for example, contacts and candidates. If a contact has supplied a candidate, or they acted as a referral for a particular vacancy, you can add that information here.

- Contact notes

  This is an open text field where you can make notes about your contact. These notes are not part of the dossier of the contact.

- Contact text fields

  Use the free text fields in this widget for filtering at a later date. The advantage of CRM criteria is that it provides you with fields that are not standard in OTYS. In contrast to the CRM criteria, the text fields can be completed to your liking. This gives you more flexibility, but also a greater risk of error.

- CRM criteria

  Use this widget to enter criteria that you can use for filtering. For example, if you select 'Yes' for 'Direct Mail', you can later filter on all contacts that have agreed to receive direct mail from you in the list view.

- Dossier

  Here you will find the complete dossier of the contact. All emails, calendar appointments, notes, but also documents as well as CVs are displayed here and can be added here. With filters and keywords you can determine which items are displayed. To leverage the full function of the dossier, it is best to read the instruction manual 'Dossiers'.

- Email aliases

  If multiple email addresses are known for a contact, such as a private email address, please enter them here. These aliases are also included in the folder setup.

- Congratulation events

  Add (recurring) congratulatory moments, like a birthday or anniversary, so you can surprise the person on the day, for example, with a bunch of flowers. You can place this as a widget on your dashboard, giving you a daily overview. More on this can be found in the instruction manual on Dashboards.

- Information

  Please enter the basic information of the contact, such as name, address and date of birth. In this widget, you have the option of setting the contact to passive.

- Marketing

  Add the email preferences of the contact here. For example, whether they want to receive marketing emails.

- Match criteria

  Add match criteria to the contact, such as industry and desired work hours. If you have entered the same match criteria in Candidates, you can have OTYS automatically match candidates to the right contacts. The difference with the CRM criteria is that the relation match criteria are also present in candidates, vacancies and relations.

- Assignments list

  Here is a list of all assignments relating to this contact. Both current and past assignments. We recommend reading the 'Assignments' instruction manual to learn how to create and manage assignments.

- Permissions

  Use this widget to set the rights for this contact. You can, for example, allow this contact to

enter vacancies, but not allow them to publish these. Or perhaps publish them, but only with the permission of the manager. The Rights settings apply only if you use the option to let contacts log into a portal of your website with a personal login.

- <u>Vacancies list</u>
  This widget gives an overview of the open vacancies at this contact. You can also create new vacancies here. You can choose to start with a new blank vacancy or from a pre-defined profile. The advantage of the latter is that some details are already completed in advance.

7 | EXECUTE ACTIONS ON A CONTACT

Besides adding information you can also execute certain actions on the contact. These actions can be found under the buttons in the far top right corner of the detail screen of the contact. Below we will discuss the various buttons and actions.
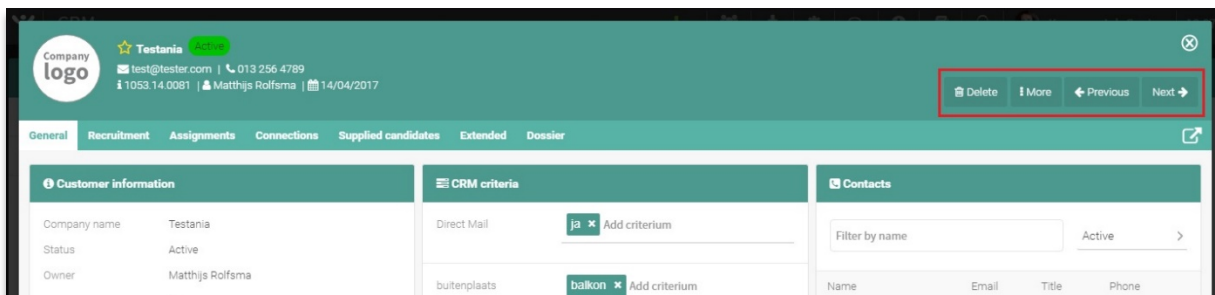

Fig. 7 – Execute an action on a contact

- Delete
  Lets you delete the contact. This means that all email correspondence and documents of this contact will also be deleted. The system will first ask for confirmation.
- More
    - Manage web user
      Create a login for your contact for the client portal, line manager portal or supplier portal. This allows a contact, for example, to edit their own profile or vacancies. This applies only if you use the option to let contacts log into a portal of your website with a personal login.
    - Make Google folder
      You may want to store files that relate to your contact on Google Drive. With this button, you can automatically create a folder in Google Drive **specifically** for this contact.
- Previous
  Jumps to the previous contact in your selection. If you made a selection based on a filter or search, the 'Previous' button will give a different result than when you arrived at this contact from the total overview.
- Next
  This button works the same way as the 'Previous' button. However, you then naturally jump to the next contact in your selection.

Below the described row with action buttons you find the 'Open in new window' button. This is especially useful if you want to quickly open multiple candidates side by side in different tabs in your browser.