Clients – Individual Records – Jobs Tab

Navigate to an individual Client record, then click the Jobs Tab to view jobs for this Client. The top section of the page allows you to create a new Job record, and the bottom section displays existing Jobs.

Add a Job

- Click the 'Add New+' link at the top of the page
- Enter the required Job information such as Type, Title, Industry, Notes etc as required
- You can auto-tweet this Job by ticking the checkbox at the top of the Add Job section. Note – you will need your Twitter username & password for this.
- Click Save to create a new Job record for this Client.

Existing Job Records

You can view existing Job records in the bottom section of the screen.

Quick-Actions for Existing Job Record

- Click +Assign to choose Consultants
- Click IDIBU (If subscribed) to post to IDIBU
- Click Adcourier (if subscribed) to post to Broadbean
- Click Jobmate (if subscribed) to post to Jobmate
- Find Candidates for this Job –
    - click Lookup,
    - enter a Postcode & distance
    - Select Criteria (e.g. 'Job Title) and enter a Value (e.g. "Manager")
    - Click 'Find Candidates'
- Delete using the Trashcan icon
- Edit using the Pencil icon