



Staffing Agencies

Advance

About

This training will help you learn advanced customizations to map the recruitment software with your requirements and make your staffing more aligned. You'll learn to streamline the recruitment process to maximize efficiency and suitability for your organization's recruitment needs.

Gain insights from tips and use cases for implementing innovative recruiting strategies and maintaining your organization's recruitment flow efficiently in Zoho Recruit.

Who's it for?

This training is for recruiter administrators and recruiters responsible for the account setup, automation, and maintenance of their organization's recruitment flow in Zoho Recruit.



ADVANCE : 8 hrs

DAY 01: 4 hrs (including break)

General setup

This topic covers the options available to customize your account's basic information.

| | |
|--------------------------|--|
| Personal settings | Personalize your account. |
| Company settings | Add the personal details of each employee. |
| Calendar settings | Integrate calendars and manage bookings. |
| Notifications | Set up custom notifications. |



Users and control

This module demonstrates how to manage your licenses and permissions across your hiring team.

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| Adding users | Invite recruiters, hiring managers, and interviewers to access Zoho Recruit. |
| Profiles and roles | Define users' access levels and hierarchy. |
| Groups | Create user groups who can access a common set of data. |
| Data sharing settings | Customize how data is shared across your organization. |



Resume management

The objective of this module is to show you the full range of options for importing resumes into Zoho Recruit.

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| Resume parser mapping | Standardize the resume parsing structure. |
| Importing resumes | Familiarize yourself with the different methods of importing resumes. |
| Resume inbox | Explore how to parse resumes from emails. |



Career site customization

This topic covers the features you can use to attract applicants and create the right impression

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|-----------------------------------|--|
| Career site setup | Design your career pages with company branding. |
| Candidate application form | Customize the application form that candidates fill out. |
| Webforms | Configure permissions based on roles. |



Job boards setup

This module discusses the different methods of acquiring candidates from external platforms.

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|------------------------|---|
| Job boards | Integrate with premium job boards to source talent. |
| Source boosters | Enable direct sourcing methods. |
| Quick apply | Streamline the application process by connecting with job boards. |



Basic modules

This topic covers the usage of Zoho Recruit's basic modules.

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|----------------------------|--|
| Departments module | Set up your departments or teams. |
| Job openings module | Understand job creation, publishing, and tracking. |
| Candidates module | Create your talent pool to select the best candidates. |
| Interviews module | Schedule, reschedule, and cancel interviews for the selection process. |



Module customization

This topic covers the nuances of building organization-specific custom modules.

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| Fields | Configure fields for each basic module according to your business needs. |
| Layout rules | Apply conditional rules for displaying data in fields. |
| Links and buttons | Create custom actions and URL redirects. |



Templates

This module discusses how to maintain pre-formatted content for streamlining the recruitment process.

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| Email templates | Create standardized emails for common hiring scenarios. |
| Offer templates | Import and customize your offer letters. |
| Job templates | Add job descriptions for various roles in your organization. |

Workflow rules

This topic covers how to automate your process by staying in constant contact with candidates.

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| Triggers and actions | Configure triggers with corresponding actions, such as sending emails, reminders, and updates for different hiring stages. |
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ADVANCE : 8 hrs

DAY 02: 4 hrs (including break)

Portal setup

This topic covers the options available to customize your account's basic information.

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| Subdomain mapping | Rebrand your portal URL. |
| Candidate portal | Customize the registration portal for candidates. |
| Vendor portal | Configure the form vendors use to submit profiles. |



Assessments

The objective of this module is to show you different tools you can use to analyze and evaluate candidates' skillsets.

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| Candidate assessments | Design questionnaires based on roles or departments. |
| Recruiter assessments | Align the screening metrics for recruiters. |
| Interviewer assessments | Structure evaluation questionnaires for interviewers. |

Hiring pipeline

This module goes over how you can manage your recruitment flow.

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| Stages | Build the stages of your hiring process. |
| Status | Incorporate application statuses into the stages you've defined. |



Blueprint

This module helps you design and streamline your recruitment flow systematically, free of loopholes.

Email settings

This topic discusses how to set up your email for easy communication with external and internal users.

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|-----------------------------|---|
| Email integration | Sync your inbox to view your emails in Zoho Recruit. |
| Email authentication | Enhance your email deliverability by whitelisting Zoho's servers. |
| Email relay | Configure your domain and server for routing emails. |



Analytics

The objective of this module is to help you to build insightful analytics and make data-driven decisions.

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| Reports | Create tables and reports to track various metrics. |
| Dashboards | Extract graphical components from generated reports. |

To-dos

This module discusses how to organize activities by creating tasks events and logging calls.

Data migration

This topic goes over how to prepare your files and system for data migration.

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| File formats | Structure the files before uploading them for migration. |
| Migration process | Map your files and execute the data migration. |



Marketplace

This module shows you how to integrate with other software platforms.

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|---------------------------------|--|
| Third-party applications | Explore the integrations available for Zoho Recruit. |
| Zoho | Connect with other Zoho applications. |
| Google and Microsoft | Integrate with these popular platforms to sync resumes, calendars, and contacts. |

