

How to Email Job Information to Multiple Job Seekers

PORTERS Trial expires in 205 days Catherine Porters Apps ?

Client Recruiter Job Person Resume Process Sales Activity

Job List (1) Filter Add New Job Bulk Action Customize View

Open(0) Close(0)

Sample Job 04

Job Sent

- Detail
- Edit
- Copy
- Delete
- Document
- Send Email
- Match
- Email History
- Resume search
- Add Activity
- Auto Matching Results

Client

Position

Salary Details

Work Location

Permission

Job Owner

Search

Mail

Search

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In this manual we will show you how to send bulk mails to job seekers from the Job list view after the matching process.

✘ You can search for Resumes from a Job record.
Please note that if more than one job is sent to a single candidate by bulk send, the email for each job is composed and sent individually.

✘ Please refer to “How to Match Job from Resume” manual: for details.

✘ There is a possibility that the screen image might change.
✘ In this manual, the default menus displayed are the default settings.
To change the global menu display settings, please refer to the document “How to Customize the Global Menu”.

Resume Search Criteria

Sort Order: Updated Date(Desc)

Keyword: Contains All (AND)

Keyword Search Mode: All Attachment Data

Process(End Flag Excluded): Contains Any (OR)
 Matching Job Sent Recommend 1st

Pinned:

Resume ID:

Person: ID Name, E-mail, Telephone
 Contains All (AND)

Resume Owner:

Registration Method: Contains Any (OR)
 Method 1 Method 2 Method 3

Phase: Contains Any (OR)
 Entry Open Close

Phase Date: -

Photo: Contains All (AND)

Current Employment Status: Contains Any (OR)
 Employed Between jobs No Experience

Educational background: Contains Any (OR)
 Junior high school High school Short-term college/Trade school/Variou school University Graduate school

Graduation date: Contains All (AND)

Current Annual Salary: -

Experienced Job Category: Contains Any (OR)

- Engineer(IT/Internet/Telecommunications)
 - Systems Analyst/Consultant
 - Project Manager
 - Application Development Engineer(Open Source)
 - Application Development Engineer(Web/Mobile)
 - Application Development Engineer(Enterprise)
 - Application Development Engineer(Embedded Systems)
 - Database Architect/Design Engineer
 - Server Architect/Design Engineer
 - Network Engineer (Design)
 - Network Engineer (Operation / Maintenance)
 - Internal Information Systems/EDP/MIS
 - Support/Maintenance/Operation/Training Project Manager
- Engineer(Electrical/Semi-Conductor)
 - Research & Development
 - Circuit Design
 - Quality Control/Production Management
- Engineer(Mechanical)
 - Research & Development
 - Mechanical Design
 - Production Technology/Process Development
 - Quality Control/Production Management
 - Senior Engineer
 - Other(Mechanical) Engineer
- Technology(Materials/Chemical)

Quick preview

Job Details

Job ID	10007
Client	Sample Client 01
Recruiter	Sample Recruiter 01
Position	Sample Job 04
Job Owner	Catherine Porters
Phase	
Phase Date	
Phase Memo	
Department	
Telephone (Recruiter)	00-0000-0000
Fax (Recruiter)	00-0000-0000
E-mail (Recruiter)	sample@porters.jp
Mobile (Recruiter)	090-0000-0000
Mobile E-mail (Recruiter)	sample@porters.jp
Zip Code (Recruiter)	000-0000
Address (Recruiter)	Sample Address (Recruiter)
Permission	Publish (Real Name)
Job Summary	Sample Job Summary
Job Category	Server Architect/Design Engineer Network Engineer (Operation / Maintenance) Network Engineer (Design) Application Development Engineer(Open Source) Support/Maintenance/Operation/Training Project Manager Internal Information Systems/EDP/MIS Other(IT/Internet/Telecommunications) Engineer Systems Analyst/Consultant Research & Development Database Architect/Design Engineer Application Development Engineer(Embedded Systems) Application Development Engineer(Enterprise) Application Development Engineer(Web/Mobile)
Business Summary	Sample Business Summary
Industry Category	Software/Information Processing IT/Telecommunications
Salary Details	Sample Salary Details
Minimum Salary	3,500,000
Maximum Salary	5,000,000
Work Location Details	Sample Work Location Details
Work Location	Tōkyō
Number of Employees	Sample Number of Employees
Memo	Sample Memo

“Resume Details” are displayed on the right side in “Quick preview”, and “Resume Search Criteria” are displayed on the left.

Set your desired search conditions and click “Search”.

Click the check box of the Resume to which you want to Email the Job information,
 ✘ if you want to send to all candidates in the matching list or the candidates displayed, please do not put any check here.

In this manual we will show you how to send bulk mails to job seekers from the Job list view after the matching process.

In the Matching list, click the records where the email will be sent.

■ Bulk Mail to Resume: Introduce jobs to job seekers.
 ■ Bulk Mail to Job: Recommend job seeker to recruiters.

✘ “Bulk Mail to Resume” and “Bulk Mail to Job” can only be used after the matching process using the Bulk Action menu. And also from the Process list view Bulk Action menu.

For our example, please select "Selected Items" and click the "Next" button.

Email

Select bulk email target.

- All Items(matching search criteria)
- Displayed Items
- Selected Items

Next Cancel

■ Bulk Send Mail can be performed using these 3 patterns:

1. All Items (Matching Search Criteria)

The count of the target items is the "●●" in the "Matching(●●)" located in the list.

✂In our example, the target count is 3.

2. Displayed Items

The default number of displayed items in the Matching list is 10. Those 10 items are the initial target records.

When "more" at the bottom of the page is clicked, an additional 30 items will be displayed. Therefore, the number of bulk send mail target records also increases.

3. Selected Items

The target items are the records with checks.

✂In our example, the target count is 2.

Template (Matching -> Person)
The templates are ordered alphabetically

Shared Templates (1)

- Job E-mail (Default) Share ✓

My Templates (3)

- e-mail magazine Share ✓
- Job E-mail Share ✓
- Job E-mail(Bulk) Share ✓

Don't share mail Share mail Signature

Send

From: <hrbc-support@porters.jp> Reply To Settings

To: **E-mail (Person) (2)** **Mobile E-mail (Person) (2)**

Cc:

Bcc:

File:

Subject:

Phase U
The phase
email. Whe
please select Update the latest Phase

Process Phase

Phase
Update the latest Phase: ▾

Process Date
NOW

Process Memo

This content will be updated in Process Memo

End Flag
 Close

End Reason
 Success Client NG Person NG
 Job Consultant NG
 Person Consultant NG

If there is no Process, update will not be performed

Add New template in My Template list +

The screen for writing the Email is displayed in another window.

The name of the Mail Type field and the number of data in each fields are displayed. Please check the data the checkboxes of the data being sent.

✂Recipients can not be added when using bulk mail sent.
✂Each recipient will receive a email which is sent to him only but not receiving the email as one of the recipients of the bulk send.

Don't share mail Share mail Signature

Send From: porters <hrbc-support@porters.jp> Reply To Settings

To: E-mail (Person) (2) Mobile E-mail (Person) (2)

Cc:

Bcc:

File:

Subject:

Input the contents (Share, From, Reply To Settings, Cc, Bcc).
✂Please refer to "How to create an Email" manual: for details.

Phase Update

The phase can be updated when sending an email. When appending to the Phase Memo, please select "Update the latest Phase"

Process Phase

Phase: Update the latest Phase: ▼

Process Date:

Process Memo:

This content will be updated in Process Memo

End Flag: Close

End Reason: Success Client NG Person NG
 Job Consultant NG
 Person Consultant NG

If there is no Process, update will not be performed

Add New template in My Template list +

Template (Matching -> Person)
The templates are ordered alphabetically

Shared Templates (1)

- Job E-mail (Default) Share ✓

My Templates (3)

- e-mail magazine Share ✓
- Job E-mail Share ✓
- Job E-mail(Bulk) Share ✓

Don't share mail Share mail Signature

Send From porters <hrbc-support@porters.jp> Reply To Settings

To E-mail (Person) (2) Mobile E-mail (Person) (2)

Cc

Bcc

File

Subject

Phase Update
The phase can be updated when sending an email. When appending to the Phase Memo, please select "Update the latest Phase"

Process Phase

Phase
Update the latest Phase: ▾

Process Date
 NOW

Process Memo

This content will be updated in Process Memo

End Flag
 Close

End Reason
 Success Client NG Person NG
 Job Consultant NG
 Person Consultant NG

If there is no Process, update will not be performed

Add New template in My Template list +

If you want to attach the files for the mail, click the "File" button.

You can attach files of up to 5MB per file, up to a total of 10MB per Email.
Corresponding extension :txt、pdf、xls、doc、ppt、xlsx、docx、pptx、html、htm、gif、jpg、jpeg、png、bmp

Template (Matching -> Person)

The templates are ordered alphabetically

Shared Templates (1)

- Job E-mail (Default) Share ✓

My Templates (3)

- e-mail magazine Share ✓
- Job E-mail Share ✓
- Job E-mail(Bulk) Share ✓

Don't share mail Share mail

Send

From: porters <hrbc-support@porters.jp>

To: E-mail (Person) (2) Mobile E-mail (Person) (2)

Cc:

Bcc:

File

Subject:

Signature

[Reply To Settings](#)

Phase Update

The phase can be updated when sending an email. When appending to the Phase Memo, please select "Update the latest Phase"

Add Attachment

Select files from HRBC or from your Computer

Select from HRBC

- Job (Sample Job 04)
 - [JOB DESCRIPTION] .pdf 2015/08/ (Date U
 - ([JOBDDESCRIPTION]) .pdf (Date U
- Recruiter (Sample Recruiter 01) - No files available

Select from Computer

Zip Options

Make a zip

Name of the zip file .zip

Less than 50 characters

Set a Password

Password will be sent automatically in an other mail

Ok

Cancel

Files that are saved in Job are available to attach by just clicking the check box.

Files saved on your PC are also available to attach by clicking the "Browse Files" button

✘If a JOB search is done from Resume, "Choose from HRBC" will be empty because JOB's attachments can not be read individually.

To attach files such as resume, please check "Make a zip". Enter the zip file name and password into the corresponding fields.

Please note that the "Set a Password" option is automatically checked when the "Make a zip" option is being checked.

✘The same password will be applied to all attachments. If different password for each attachment is desired, they have to be sent by different separated emails.

Click "OK"

The screenshot displays the email composition interface in the PORTERS HR-Business Cloud system. On the left, a 'Template' sidebar lists 'Job E-mail' as the selected template. The main composition area shows fields for 'From' (porters), 'To' (E-mail (Pe...)), 'Cc', 'Bcc', and 'File' (archive.zip). The subject is 'Career Opportunities'. A 'Signature' dropdown is visible at the top right. On the far right, a 'Phase Update' panel is open, showing 'Process Phase' checked, 'Phase' set to 'Job Sent', and 'Process Date' as '2015/11/24 15:30'. The 'Process Memo' field is empty. Below the memo, there are options for 'End Flag' (Close) and 'End Reason' (Success, Client NG, Person NG, Job Consultant NG, Person Consultant NG). A message at the bottom of the panel states 'A new Process will be added'.

Please choose the signature to be used in this Email by clicking the corresponding signature button.

Please choose the template to be used by clicking the template name.
For creating template, please refer "How to Create an Email Template".

When sending bulk mail, the tags shown in the mail compose window will be replaced by the corresponding data stored in HRBC.

Automatically update Process after sending Email. It will come in handy if this is set up together with the template.

Template (Matching -> Person)

The templates are ordered alphabetically

Shared Templates (1)

- Job E-mail (Default) Share ✓

My Templates (3)

- e-mail magazine Share ✓
- Job E-mail** Share ✓
- Job E-mail(Bulk) Share ✓

Add New template in My Template list +

Don't share mail Share mail

Click the Send button after composing the email.

Please note that there is no confirmation screen. In other words, the email will be sent immediately after clicking the Send button.

Send

From: _____

To: E-mail (Person) (2)

Cc: _____

Bcc: _____

File: archive.zip x

Subject: Career Opportunities

{{Person.P_Name:Person Name}}

We have a job you may be interested in !

This is {{User.P_Name:Name}} of {{Company.P_Name:Company Name}}.

{{Person.P_Name:Person Name}}, we would like to introduce you to a new opening which suits your skills and experience. Please contact{{User.P_Name:Name}} if you are interested in the opportunity.

We look forward to hearing from you.

■ Job Information

【Company Name】 {{Client.P_Name:Client Name}}

【Position】 {{Job.P_Position:Position}}

【Job Detail】
{{Job.P_JobCategorySummary:Job Summary}}

【Business Summary】
{{Job.P_IndustrySummary:Business Summary}}

【Number of Employees】 {{Job.P_PayrollsText:Number of Employees}}

【Location】 {{Job.P_AreaSummary:Work Location Details}}

【Annual Salary (JPY)】
{{Job.P_MinSalary:Minimum Salary}} ~ {{Job.P_MaxSalary:Maximum Salary}}
{{Job.P_SalarySummary:Salary Details}}

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Signature

[Reply To Settings](#)

Phase Update

The phase can be updated when sending an email. When appending to the Phase Memo, please select "Update the latest Phase"

Process Phase

Phase
Job Sent

Process Date
2015/11/24 15:30 NOW

Process Memo

End Flag
 Close

End Reason
 Success
 Client NG
 Person NG
 Job Consultant NG
 Person Consultant NG

A new Process will be added

Template (Matching -> Person)
The templates are ordered alphabetically

Shared Templates (1)
Job E-mail (Default) Share ✓

My Templates (3)
e-mail magazine Share ✓
Job E-mail Share ✓
Job E-mail(Bulk) Share ✓

Don't share mail Share mail Signature

Send

From: porters <hrbc-support@porters.jp> Reply To Settings

To: E-mail (Person) (2) ✓ Mobile E-mail (Person) (2) □

Cc:

Bcc:

File: archive.zip x

Subject: Career Opportunities

{{Person.P_Name:Person Name}}
We have a job you may be interested in !
This is {{User.P_Name:Name}} of {{Company.P_Name:Company Name}}.
{{Person.P_Name:Person Name}}, we would like to introduce you to a new opening which suits your skills and experience.
Please contact{{User.P_Name:Name}} if you
We look forward to hearing from you.

■ Job Information

[Company Name] {{Client.P_Name:Client}}
[Position] {{Job.P_Position:Position}}
[Job Detail]
{{Job.P_JobCategorySummary:Job Summary}}
[Business Summary]
{{Job.P_IndustrySummary:Business Summary}}
[Number of Employees] {{Job.P_PayrollsText:Number of Employees}}
[Location] {{Job.P_AreaSummary:Work Location Details}}
[Annual Salary (JPY)]
{{Job.P_MinSalary:Minimum Salary}} ~ {{Job.P_MaxSalary:Maximum Salary}}
{{Job.P_SalarySummary:Salary Details}}

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Add New template in My Template list +

Phase Update
The phase can be updated when sending an email. When appending to the Phase Memo, please select "Update the latest Phase"

Process Phase

Phase
Job Sent ▼

Process Date
2015/11/24 15:30 NOW

Process Memo

End Flag
 Close

End Reason
 Success Client NG Person NG
 Job Consultant NG
 Person Consultant NG
A new Process will be added

PORTERS

There are some cases where a mail will not be sent when using the phase update option:

- There are phase flow settings that conflict with the current item
- There are phase field restrictions that conflict with the current item

In those cases, the mail will not be sent and the reason will be written in the Bulk mail report.

Do you want to send the bulk mail?

Yes No

Warning message is shown. Please confirm and click the "Yes" button. If the "No" button is clicked, HRBC will go back to the mail compose screen.

Template (Matching -> Person)
The templates are ordered alphabetically

Shared Templates (1)

- Job E-mail (Default) Share ✓

My Templates (3)

- e-mail magazine Share ✓
- Job E-mail Share ✓
- Job E-mail(Bulk) Share ✓

Don't share mail Share mail

 **Send**

From: porters <hrbc-support@porters.jp> Reply To Settings

To: E-mail (Person) (2) Mobile E-mail (Person) (2)

Cc: _____

Bcc: _____

File:  archive.zip x

Subject: Career Opportunities

Signature 

Phase Update
The phase can be updated when sending an email. When appending to the Phase Memo, please select "Update the latest Phase"

Process Phase

Phase: Job Sent

Process Date: 2015/11/24 15:30 NOW

Process Memo

End Flag Close

End Reason Success Client NG Person NG
 Job Consultant NG
 Person Consultant NG
A new Process will be added

Send

Subject: Career Opportunities

Content:
{{Person.P_Name:Person Name}}
We have a job you may be interested in !
This is {{User.P_Name:Name}} of {{Company.P_Name:Company Name}}.
{{Person.P_Name:Person Name}}, we would like to introduce you to a new opening which suits your skills and experience.
Please contact{{User.P_Name:Name}} if you are interested in the opportunity.
We look forward to hearing from you.

■ Job Information

【Company Name】 {{Client.P_Name:Client Name}}

【Position】 {{Job.P_Position:Position}}

【Job Detail】
{{Job.P_JobCategorySummary:Job Summary}}

【Business Summary】
{{Job.P_IndustrySummary:Business Summary}}

【Number of Employees】 {{Job.P_PayrollsText:Number of Employees}}

【Location】 {{Job.P_AreaSummary:Work Location Details}}

【Annual Salary (JPY)】
{{Job.P_MinSalary:Minimum Salary}} ~ {{Job.P_MaxSalary:Maximum Salary}}
{{Job.P_SalarySummary:Salary Details}}

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Add New template in My Template list +

PORTERS

The bulk Email has started. You can review the progress and result by clicking on the icon in the top right corner and choosing bulk Email

OK

Bulk emails are being sent. Please click "OK" to close the mail screen.

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Client Recruiter Job Person Resume Process Sales Activity

Job List (1) Filter Add New Job Bulk Action

Open(0) Close(0)

Sample Job 04

Job Sent 2

Client	Sample Client 01
Position	Sample Job 04
Salary Details	Sample Salary Details
Work Location	Tōkyō
Permission	Publish (Real Name)
Job Owner	N/A Catherine Porters

Matching (4) Search Resume Bulk Action

	Resume ID	Resume Title
<input checked="" type="checkbox"/>	10007	Anne Takahashi(10007)
<input checked="" type="checkbox"/>	10001	Sample Person 01(10001)
<input type="checkbox"/>	10002	Sample Person 02(10002)
<input type="checkbox"/>	10004	Tommy February(10004)

Auto Matching Add New

Auto Matching Results

Resume - Bulk Mail Complete
Start time 2015/11/24 15:31
End time 2015/11/24 15:32
[Download the file containing the results of the mail send bulk operation](#)

Mail icon in bottom left corner

Search icon in bottom left corner

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After the email is sent, a mail icon is displayed at the upper right corner of the screen. Click this icon, then click the "Download" link to download and check the result.

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Client Recruiter Job Person Resume Process Sales Activity

Job List (1) Filter Add New Job Bulk Action Customize View

Open(0) Close(0)

Sample Job 04

Job Sent 2

Client Sample Client 01 Phase

Position Sample Job 04 Phase Date

bulk_mail_log_686169.csv - Microsoft Excel

Date sent	URL	To	Status	Error code	Details
2015/11/24 15:23	https://hrbc-jp.porterscloud.com/resume/search/id/10007	aaa@porters.jp	Sent	0	Success
2015/11/24 15:23	https://hrbc-jp.porterscloud.com/resume/search/id/10001	sample@porters.jp	Sent	0	Success

After downloading the result (CSV) file, you can now verify the result.

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Client Recruiter Job Person Resume Process Sales Activity

Job List (1) Filter Add New Job Bulk Action

Open(0) Close(0)

Sample Job 04

Job Sent 2

Client	Sample Client 01
Position	Sample Job 04
Salary Details	Sample Salary Details
Work Location	Tōkyō
Permission	Publish (Real Name)
Job Owner	N/A Catherine Porters

Matching (4)

Resume ID	Resume Title	Phase	Phase D
10007	Anne Takahashi(10007)	Open	2014/1
10001	Sample Person 01(10001)	Open	2014/1
10002	Sample Person 02(10002)	Open	2014/1
10004	Tommy February(10004)	Entry	2014/1

Auto Matching Add New

Auto Matching Results

Mail Search

Job | Sample Job 04 (10007) (17) Print View

E-mail (Recruiter) sample@porters.jp

Mobile (Recruiter) 090-0000-0000

Mobile E-mail (Recruiter) sample@porters.jp

Job Information

Permission Publish (Real Name)

Job Summary Sample Job Summary

Job Category Systems Analyst/Consultant, Project Manager, Application Development Engineer(Open Source), Application Development Engineer(Web/Mobile), Application Development Engineer(Enterprise), Application Development Engineer(Embedded Systems), Database Architect/Design Engineer, Server Architect/Design Engineer, Network Engineer (Design), Network Engineer (Operation / Maintenance), Internal Information Systems/EDP/MIS, Support/Maintenance/Operation/Training, Research & Development, Other(IT/Internet/Telecommunications) Engineer

Business Summary Sample Business Summary

Industry Category Software/Information Processing, IT/Telecommunications

Salary Details Sample Salary Details

Minimum Salary 3,500,000

Maximum Salary 5,000,000

Work Location Details Sample Work Location Details

Work Location Tōkyō

Number of Employees Sample Number of Employees

Memo Sample Memo

System Information

Date Created 2014/12/09 10:50:22

Registered by N/A Stacie

Edit Copy Delete Document Send Email Resume

Sublist | Attachment Add New

ID	File Name	Created
21	[JOB DESCRIP TION].pdf	2015/06/06 19:33:48

Sublist | Phase History Add New

Sublist | Process Add New Bulk Action Process List

Process ID	Resume Title	Process	Process Date	Process Memo	End Flag	Process Owner	Date Updated
10026	Sample Person 01(10001)	Job Sent	2015/11/24 15:30:00			N/A Catherine Porters	2015/11/24 15:31:05
10025	Anne Takahashi(10007)	Job Sent	2015/11/24 15:30:00			N/A Catherine Porters	2015/11/24 15:31:04
10023	Hanako Yamada(10003)	Job Sent	2015/08/06 19:34:00			N/A Catherine Porters	2015/08/06 19:35:04
10022	Taro Yamada(10010)	Job Sent	2015/08/06 19:34:00			N/A Catherine Porters	2015/08/06 19:35:03
10012	Meg Tanaka(10009)	Recommend	2015/08/06 13:32:00		Close	N/A Stacie	2015/02/19 11:31:11

Sublist | Activity Add New

Sublist | Sales Add New Sales List

The contents that you selected when sending the Email are reflected in "Process" in the Sublist.