Update, Delete, Close Process for selection

| rocess (10) | | Add New Pro | Display the | Process you wish to undate in t |
|-----------------------|--------------------------|--------------|---------------|------------------------------------|
| Matching(2) 🔲 Job S | Gent(5) 🗌 Recommend(1) | 🔲 1st Interv | | click the title |
| 🗌 🔽 Mea Tanaka | /Sample Client 01 | | ть | ener eliek "Edit" in the Action Ma |
| Detail | Proe | | In | ien click Edit in the Action we |
| Edit | cess Date | 2015/07 | N | |
| Copy Edit | ess Memo | | | |
| Delete | End Flag | | | |
| Document | d Reason | | | If you want to delete the da |
| Send Email | ated Sales | | | "Yes" in the confiri |
| Empil History | sing Date | | | |
| Email History | ess Owner | N/A Stac | ie | |
| Email to Recru | ole Client | <u>01</u> | | × Please note that deleted c |
| Email to Perso | n Process | Job Sent | | |
| Open in listvie | w cess Date | 2014/06 | /20 14:52:00 | |
| Edit Job | ess Memo | | | |
| Detail Job | End Flag | | | |
| | End Reason | | | |
| | Estimated Sales | | | |
| E | xpected Closing Date | | | |
| | Process Owner | N/A Cath | erine Porters | |
| 🔲 🔽 <u>Hanako Yan</u> | nada/Sample Client | <u>01</u> | | |
| | Process | Job Sent | | |
| | Process Date | 2014/10 | /29 11:41:00 | |
| | Process Memo | | | |
| | End Flag | | | |
| | End Reason | | | |
| | Estimated Sales | | | |
| E | xpected Closing Date | | | |
| | Process Owner | N/A Cath | erine Porters | |
| 🔲 🔽 Meg Tanaka | <u>/Sample Client 01</u> | | | |
| | Process | Job Sent | | |
| | Process Date | 2014/12 | /09 11:42:00 | |
| | Process Memo | | | |
| | End Flag | Close | | |
| | End Reason | Client NO | 3 | |
| | Estimated Sales | | | |

To change the global menu display settings, please refer to the document "How to Customize the Global Menu".

| | | | Catherine | Porters | Apps 🗸 🖁 | ≈ ? |
|----------------|--------------|----------------------|-----------|-----------|-------------|-----|
| st view, | | | | <u>Cu</u> | stomize Vie | ew |
| | | | | | | |
| | Client | Sample Client 01 | | | | |
| | Job | Sample Job 03 | | | | |
| | Resume | Meg Tanaka(10009) | | | | |
| lick "Delete", | , then click | | | | | |
| on dialog box | x. | | | | | |
| U | | | | | | |
| can never be | recovered. | | | | | |
| | Climat. | Consult Olivet Of | | | | |
| | Client | Sample Lieh 02 | | | | |
| | Jop | Sample Job 03 | | | | |
| | Resume | | | | | |
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| | | | | | | |
| | | | | | | |
| | Client | Sample Client 01 | | | | |
| | Job | Sample Job UI | | | | |
| | Resume | Hanako Yamada(10003) | | | | |
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| | | | | | | |
| | ol' | Comple Client Of | | | | |
| | Client | Sample Lieht 01 | | | | |
| | Jop | Sample Job 04 | | | | |
| | Resume | neg ranaka(10009) | | | | |
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| | | | | | | |
| | Client | Sample Client 01 | | | | |
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| POR | TERS Trial expires in 321 days | Process - Edit | | |
|-----|---|--|---|----------|
| | Client Recruiter Job Person I | | | _ |
| P | rocess (10) | Basic Information | | |
| _ | Matching(2) Iob Sent(5) Recomme | Process ID | 10019 | |
| | Meg Tanaka/Sample Client (| Process(Current) | 1st Interview | |
| | Pro Process I Process M End End Res | Process Date(Current) | 2015/07/27 11:55 NOW | |
| | | Process Memo(Current) | | |
| | | | | |
| | Estimated S | End Flag | Close | <u> </u> |
| | Expected Closing I Process Ov | End Peacon | Susses Client NC Derson NC | |
| | | End Reason | Success Client NG Person NG Iob Cunsultant NG | |
| | Hanako Yamada/Sample Cli | | Person Consultant NG | |
| | Process I | Estimated Sales | | |
| | Process M | Lotinated outeo | | |
| | End End Rea | Expected Closing Date | NOW | |
| | Estimated S | Process Owner | N/A Stacie | |
| | Expected Closing I | - Contact Information | | |
| Q | Process Ov | Telephone (Recruiter) | 00-0000-0000 | |
| | | Fax (Recruiter) | 00-0000-0000 | |
| | Process I | E-mail (Recruiter) | sample@porters.jp | |
| | Process Me End | Mobile Number (Recruiter) | 090-0000-0000 | Mo |
| | End Rea | Mobile E-mail (Recruiter) | sample@porters.jp | м |
| | Expected Closing I | System Information | | |
| | Process Ov | , Date Created | 2015/07/23 11:55:03 | |
| | Meg Tanaka/Sample Client (| Register | | |
| | Pro | Clic | ck "Save" after inputting | |
| | Process I Process M | "Pro | cess (Current)" "Process | |
| | End | | Date (Current)" | |
| | End Rea | a na d | Date (Current)" | |
| | Estimated S | and | Process Date (Current). | |
| | Expected Closing I | | | |
| | Appo Tokohochi (Comula Oli | | Send notifica | ation en |
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| | | Catherine | Porters | Apps 🗸 🕻 | ₹ ? |
|----------------------|-----------------------|-----------|---------|-------------|---------|
| | Tequired web document | | | · · · >// | |
| Client | Sample Client 01 | | Cus | stomize Vie | <u></u> |
| Recruiter | Sample Recruiter 01 | | | | |
| Job | Sample Job 03 | | | | |
| Job Owner | N/A Catherine Porters | | | | |
| Resume | Meg Tanaka(10009) | | | | |
| Resume Owner | N/A Catherine Porters | | | | |
| | | | | | |
| Telephone (Person) | 03-0000-0009 | | | | |
| Fax (Person) | | | | | |
| E-mail (Person) | e1@porters.jp | | | | |
| ile Number (Person) | 080-0000-0001 | | | | |
| bile E-mail (Person) | keitai@porters.jp | | | | |
| | | | | | |
| Date Updated | 2015/07/31 15:15:44 | | | | |
| Updated by | N/A Catherine Porters | _ | | | |
| | | | | | |
| | | | | | |
| Cancel | | | | | |

| TERS Trial expires in 321 days | Catherine Porters Apps - |
|---|--|
| Client Recruiter Job Person Resume Process Sales Activity | |
| Add New Process Bulk Action | × Process Mog Tanaka/Sample Client 01 (10019) V (0) |
| | |
| Matching(2) Job Sent(5) Recommend(0) 1st Interview(2) 2nd Interview(0) Decision(1) Offer(0) | Edit Copy Delete Document Send Email Email to Recruiter Email to Person Open in listview Edit Job |
| Meg Tanaka/Sample Client 01 | Detail Job |
| Process 1st Interview | - Basic Information |
| Process Date 2015/07/27 11:55:00 | Process ID 10019 Client Sample Client 01 |
| Process Memo | Process (Current) 1st Interview Recruiter <u>Sample Recruiter 01</u> |
| End Flag | Process Date (Current) 2015/07/27 11:55:00 Job Sample Job 03 |
| End Reason | Process Memo Job Owner Catherine Porters |
| Estimated Sales | (current) Resume Meg Tapaka(10009) |
| Process Owner N/A Stacio | Resume Owner Catherine Porters |
| The | e modifications are reflected |
| Hanako Yamada/Sample Client 01 | in Process list and Sublist |
| Process Job Sent | |
| Process Date 2014/06/20 14:52:00 | |
| Process Memo | Telephone (Recruiter) 00-0000-0000 Telephone (Person) 03-0000-0009 |
| End Flag | Fax (Recruiter) 00-0000 Fax (Person) |
| End Reason | E-mail (Recruiter) sample@porters.jp E-mail (Person) er@porters.jp Mobile Number 090-0000-0000 Mobile Number 080-0000-0001 |
| Estimated Sales | (Recruiter) (Person) |
| Expected Closing Date | Mobile E-mail sample@porters.jp Mobile E-mail (Person) keitai@porters.jp |
| Process Owner N/A Catherine Porters | (Recruiter) |
| Hanako Yamada/Sample Client 01 | ✓ System Information |
| Process Job Sent | Date Created 2015/07/23 11:55:03 Date Opdated 2015/07/31 15:18:55 |
| Process Date 2014/10/29 11:41:00 | Edit Conv. Doloto Dogument Cond Empil to Dogument Empil to Dogument Cond Empil to Dogument |
| Process Memo | Edit Copy Delete Document Send Email Email to Recruiter Email to Person Open in listview Edit Job |
| End Flag | Detail Job |
| End Reason | |
| Estimated Sales | Sublist Process History C Add New |
| | 2015/07/27 11:55:00 1st Intenview |
| | Porters |
| Meg Tanak The latest process is one having the groon flag on | 2015/07/25 11:55:00 Recommend N/A Catherine 2015/07/31 15:15:44 |
| The latest process is one having the green hag on | Porters |
| it's left side. | 2015/07/23 11:55:00 Job Sent N/A Stacie 2015/07/23 11:56:09 |
| | 2015/07/23 11:54:00 Job Sent N/A Stacie 2015/07/23 11:55:03 |
| | |
| Estimated Salas | Sublist Sales 🖒 Add New Sales List 🖸 |
| Estimated Sales | Sales ID Client Name Position Resume Sales Record Date Joining Date Date |
| Process Owner N/A Stacie | Title Amount Updated |
| | <u>Sample Client Sample Job U</u> 01 1 n 02(10002) 2014/06/16 2014/05/16 2014/05/16 16:19:28 |
| Anne Takahashi/Sample Client 01 | 10006 Sample Client Sample Job 0 Sample Perso 2,000,000 2014/06/16 2014/05/16 2014/05/19 |
| Process Job Sent | <u>01</u> <u>1</u> <u>n 02(10002)</u> 16:19:11 |

| | | | Catherine Porters Apps - 🔅 🕥 |
|--|--|--------|------------------------------|
| Client Regruiter Job Derson Regum | Drocoss Salas Activity | | Cathenne Porters Apps + 🍾 🕐 |
| Client Recruiter Job Person Resum | le Process Sales Activity | | |
| Process (10) Ad | dd New Process Bulk Action | | Customize View |
| Matching(2) Job Sent(5) Recommend(1) | 1st Interview(1) 2nd Interview(0) Decision(1) Offer(0) | | |
| Meg Tanaka/Sample Cli <u>ent 01</u> | | | |
| Detail Proc | | Client | Sample Client 01 |
| Edit | Display the Process data you wish to edit. | Job | Sample Job 03 |
| Copy ss Memo | | Resume | Meg Tanaka(10009) |
| Delete End Flag | Then click "Edit" in the action menu. | | |
| Document ed Sales | | | |
| Send Email ing Date | | | |
| Email History s Owner | N/A Stacie | | |
| Email to Recruiter | 1 | | |
| Email to Person Process | ≜ lob Sent | Client | Sample Client 01 |
| Open in listview ess Date | 2014/06/20 14:52:00 | Job | Sample Job 03 |
| Edit Job ss Memo | | Resume | Hanako Yamada(10003) |
| Detail Job End Flag | | | |
| End Reason | | | |
| Estimated Sales | | | |
| ail Expected Closing Date | N/A Cathoring Destant | | |
| Process Owner | N/A Catherine Porters | | |
| rch 🔲 🔽 Hanako Yamada/Sample Client 01 | <u>1</u> | | |
| Process | Job Sent | Client | Sample Client 01 |
| Process Date | 2014/10/29 11:41:00 | Job | Sample Job 01 |
| Process Memo | | Resume | Hanako Yamada(10003) |
| End Reason | | | |
| Estimated Sales | | | |
| Expected Closing Date | | | |
| Process Owner | N/A Catherine Porters | | |
| Meg Tanaka/Sample Client 01 | | | |
| Process | Job Sent | Client | Sample Client 01 |
| Process Date | 2014/12/09 11:42:00 | Job | Sample Job 04 |
| Process Memo | | Resume | Meg Tanaka(10009) |
| End Flag | Close | | |
| End Reason | Client NG | | |
| Estimated Sales | | | |
| Process Owner | N/A Stacie | | |
| Appa Takabashi (Caparla Cliart Of | | | |
| Anne Takanasni/Sample Client 01 | Joh Cont | | Comple Client 01 |
| Process | | Client | |

| POR | TERS Trial expires in 321 days | Process - Edit | | | | |
|-----|-----------------------------------|--|-----------------------------|--------------------|--------------------|---|
| | Client Recruiter Job Person I | - Basic Information | | | | |
| P | rocess (10) | Process ID | 10019 | | | To Close a process, check "Close" of the End Flag. |
| | Matching(2) Job Sent(5) Recomme | Process(Current) | Recommend | • | | |
| | | Presses Data(Current) | | | It is recomm | ended not to change the layout and options of "End Reason" and |
| | Process I | Process Date(Current) | 2015/07/28 11:55 NOW | | | "End Flag" for general purpose. |
| | Process M | Process Memo(Current) | | | | |
| | End Rea | | | | To customize | the layout and options, please refer to the "Customize" manual |
| | Estimated S | End Flag | Close | | To End Flag is | not for successful candidates. Please use "Join" option in that cas |
| | Expected Closing I Process Ov | End Reason | Success Client NG Person NG | | | |
| | Hanako Yamada/Sample Cli | | Job Cunsultant NG | | | |
| | Pro | | Person Consultant NG | | | |
| | Process I | Estimated Sales | | | | |
| | End | Expected Closing Date | NOW | | | |
| | End Rea | Process Owner | N/A Stacie | | | |
| | Estimated S Expected Closing I | - Contact Information | | | Please cheo | ck the suitable End Reason. |
| | Process Ov | Telephone (Recruiter) | 00-000-0000 | This examp | le shows that t | the application is rejected because of the |
| | 🗖 💌 Hanako Yamada/Sample Cli | Eax (Beerwiter) | 00-0000-0000 | | client failed it a | at the recommendation phase. |
| | Pro | E-mail (Recruiter) | sample@porters in | | | |
| | Process M | E-mail (Recruiter) | | | X"Process(c | current) will not be updated." |
| | End | (Recruiter) | 090-0000-0000 | | | |
| | End Rea Estimated S | Mobile E-mail (Recruiter) | sample@porters.jp | | | |
| | Expected Closing I | System Information | | 、 、 | | |
| | Process Ov | Date Created | 2015/07/23 11:55:03 | | Date Updated | 2015/07/31 15:46:49 |
| | Meg Tanaka/Sample Client (| Registered by | N/A Stacie | | Updated by | N/A Catherine Porters |
| | Process I | | | | | |
| | Process M | | Click "Save" aft | ter editing. | | |
| | End Rea | | | | | |
| | Estimated S | | | | | |
| | Expected Closing I Process Ov | | Send n | notification email | | |
| | Anne Takahashi/Sample Clie | | <u>Send n</u> | | <u></u> | |
| | Pro | | Save | Car | ncel | |

| | Client | al expires in Recruiter | Job | Person | Resume | Process S | ales Activ | /ity | | | | |
|--------|--------------|----------------------------|---------------|-------------------|-----------------|------------------|--------------|-------|--------------------|------------|----------|-----------|
| P | rocess | (10) | | | Add | New Process | Bulk Acti | ion 👻 | | | | |
| | Matching | (2) 🗌 Job | Sent(5) | Recomm | nend(1) | 1st Interview(1) | 2nd Intervie | w(0) | Decision(1 |) Offer(0) |) | |
| | □ - M | eg Tanak | ka/Sam | ple Client | <u>: 01</u> | | | | | | | |
| | | í | | Pr | ocess | Recommend | | | · } | | | |
| | | | | Process | Date | 2015/07/28 1 | 1:55:00 | | | | End | Posconi |
| | | i i | | Process I | Memo | | | | ⁴ | \langle | Enur | Neason i |
| | | i | | End | d Flag | | | | 1 | | examp | le, we le |
| | | 1 | | End Re | eason | Client NG | | | | | the reco | ommend |
| | | | E | Estimated | Sales | | | | | | is vot t | o he cor |
| | | i | Expecte | ed Closing | Date | | | | ! | | is yet t | |
| | | | | Process C |)wner | N/A Stacie | | | | | | |
| | H | anako Ya | mada/ | Sample C | <u>lient 01</u> | | | | | | | |
| | | | | Pr | ocess | Job Sent | | | | | | |
| | | | | Process | Date | 2014/06/20 1 | 4:52:00 | | | | | |
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| | | | | End | d Flag | | | | | | | |
| | | | | End Re | eason | | | | | | | |
| \leq | | | E | Estimated | Sales | | | | | | | |
| ail | | | Expecte | ed Closing | Date | | | | | | | |
| 2 | | | | Process C |)wner | N/A Catherine | Porters | | | | | |
| arch | H | <u>anako Ya</u> | imada/ | <u>Sample C</u> | <u>lient 01</u> | | | | | | | |
| | | | | Pr | ocess | Job Sent | | | | | | |
| | | | | Process | Date | 2014/10/29 1 | 1:41:00 | | | | | |
| | | | | Process I | Memo | | | | | | | |
| | | | | End | d Flag | | | | | | | |
| | | | | End Re | eason | | | | | | | |
| | | | E | Estimated | Sales | | | | | | | |
| | | | Expecte | ed Closing | Date | N/A C II - : | D . | | | | | |
| | | | | Process C | Owner | N/A Catherine | Porters | | | | | |
| | - 🗾 M | <u>eg Tanak</u> | <u>ka/Sam</u> | <u>ple Client</u> | <u>: 01</u> | | | | | | | |
| | | | | Pr | ocess | Job Sent | | | | | | |
| | | | | Process | Date | 2014/12/09 1 | 1:42:00 | | | | | |
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| | | | | End | d Flag | Close | | | | | | |
| | | | | End Re | eason | Client NG | | | | | | |
| | | | E | stimated | Sales | | | | | | | |
| | | | Expecte | ed Closing | Date | NI/A Charle | | | | | | |
| | | | | Process C | wner | N/A Stacle | | | | | | |
| | | nne Taka | hashi/S | Sample C | lient 01 | | | | | | | |
| | | | | Pr | ocess | Job Sent | | | | | | |
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| | | | <u>Cı</u> | <u>istomize View</u> | _ |
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| s added to the correspon- earn that the Client failed lation phase and the fact ntacted as the "Close" of t | ding data. In this the application at that the candidate the End Flag is not | | | | |
| checked. | | | | | - 1 |
| | | | | | |
| cient. | | | | | |
| Job Resume | Sample Job 03 Hanako Yamada(10003) | | | | - 1 |
| Kesume | | | | | - 1 |
| | | | | | - 1 |
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| | | | | | - 1 |
| | | | | | |
| Client | Sample Client 01 | | | | |
| Job | Sample Job 01 | | | | |
| Resume | Hanako Yamada(10003) | | | | |
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| | | | | | |
| Client | Sample Client 01 | | | | |
| Job | Sample Job 04 | | | | |
| Resume | Meg Tanaka(10009) | | | | |
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| Client | Sample Client 01 | | | | |
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| POR | TERS Trial expires in 321 days | Process - Edit | | |
|------|----------------------------------|---|---------------------------------|------------|
| | Client Recruiter Job Person | - Basic Information | | |
| P | Process (10) | Process ID | 10019 | |
| | Matching(2) Job Sent(5) Recomme | Brocoss(Current) | Decement | |
| | Meg Tanaka/Sample Client (| Process(current) | Recommend | |
| | Pro Process I | Process Date(Current) | 2015/07/28 11:55 Check the | e End Fl |
| | Process M | Process Memo(Current) | | contact |
| | End | | | |
| | End Rea Estimated S | | | |
| | Expected Closing I | End Flag | Close | |
| | Process Ov | End Reason | Success 🕑 Client NG 📃 Person NG | |
| | Hanako Yamada/Sample Cli | | Job Cunsultant NG | |
| | Pro | | Person Consultant NG | |
| | Process I | Estimated Sales | | |
| | End | Expected Closing Date | NOW | |
| | End Rea | Process Owner | N/A Stacie | |
| | Estimated S | Process Owner | | |
| lail | Expected Closing I Process Ov | Contact Information | | |
| | Hanako Vamada/Sample Cli | Telephone (Recruiter) | 00-0000-0000 | Te |
| | | Fax (Recruiter) | 00-0000-0000 | |
| | Process I | E-mail (Recruiter) | sample@porters.jp | |
| | Process M | Mobile Number | 090-0000-0000 | Mobile |
| | End End Rea | (Recruiter) | | |
| | Estimated S | Mobile E-mail (Recruiter) | sample@porters.jp | Mobi |
| | Expected Closing I | System Information | | |
| | Process Ov | Date Created | 2015/07/23 11:55:03 | |
| | Meg Tanaka/Sample Client (| Registered by | N/A Stacie | |
| | Pro Process I | | | |
| | Process M | | Click "Save" after e | diting. |
| | End | | | |
| | End Rea Estimated S | | | |
| | Expected Closing I | | | |
| | Process Ov | | Send notifica | tion email |
| | Anne Takahashi/Sample Clie | | Save | Ca |
| | Pro | | | |

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|-------------------------------------|-----------------------|-----------|-----------|---------------------|---|
| | required web document | | | | |
| | | | <u>Cu</u> | <u>stomize View</u> | |
| Client | Sample Client 01 | | | | Ê |
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| ag's "Close" che ing the candida | te. | | | | |
| | | | | | |
| Resume Owner | N/A Catherine Porters | | | | |
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| | | | | | |
| | | | | | |
| elephone (Person) | 03-0000-0009 | | | | |
| Fax (Person) | | | | | |
| E-mail (Person) | e1@porters.jp | | | | |
| Number (Person) | 080-0000-0001 | | | | |
| le E-mail (Person) | keitai@porters.jp | | | | |
| | | | | | |
| Date Updated | 2015/07/31 15:48:22 | | | | |
| Updated by | N/A Catherine Porters | | | | |
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| ncel | | | | | |

| POH | TERS Trial expires in 3 | 21 days | | | | | | | |
|------|-------------------------|-------------------|-----------|------------------|----------------|---------------|------------|------------|------------|
| S) | Client Recruiter | Job Person I | Resume | Process S | ales Activity | | | | |
| P | TOCESS (10) | | Add | New Process | Bulk Action | • | | | |
| | Matching(2) 🔲 Job S | ent(5) 🗌 Recomme | nd(1) 🗌 | 1st Interview(1) | 2nd Interview(|) Decision(1) |) Offer(0) | | |
| | Meg Tanaka | /Sample Client (|)1 | | | | | | |
| | (| Pro | cess | Recommend | | 、 | | | |
| | I | Process I | Date | 2015/07/28 1 | 1:55:00 | | | This proce | ess is cor |
| | 1 | Process M | emo | | | | | j · | |
| | | End | Flag | Close | | | | | |
| | | End Rea | son | Client NG | | | | J | |
| | | Estimated S | ales | | | | | | |
| | | xpected Closing [| Date | | | | | | |
| | | Process Ov | /ner | N/A Stacie | | | | | |
| | Hanako Yan | nada/Sample Cli | ent 01 | | | | | | |
| | | Pro | cess | Job Sent | | | | | |
| | | Process [| Date | 2014/06/20 1 | 4:52:00 | | | | |
| | | Process M | emo | | | | | | |
| | | End | Flag | | | | | | |
| | | End Rea | son | | | | | | |
| | | Estimated S | ales | | | | | | |
| lail | E | xpected Closing [| Date | | | | | | |
| | | Process Ov | ner | N/A Catherine | Porters | | | | |
| | Hanako Yan | nada/Sample Cli | ent 01 | | | | | | |
| arch | | Pro | cess | Job Sent | | | | | |
| | | Process I | Date | 2014/10/29 1 | 1:41:00 | | | | |
| | | Process M | emo | | | | | | |
| | | End | Flag | | | | | | |
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| | | Estimated S | ales | | | | | | |
| | E | xpected Closing [| Date | | | | | | |
| | | Process Ov | /ner | N/A Catherine | e Porters | | | | |
| | Meg Tanaka | /Sample Client (| <u>)1</u> | | | | | | |
| | | Pro | cess | Job Sent | | | | | |
| | | Process [| Date | 2014/12/09 1 | 1:42:00 | | | | |
| | | Process M | emo | | | | | | |
| | | End | Flag | Close | | | | | |
| | | End Rea | son | Client NG | | | | | |
| | | Estimated S | ales | | | | | | |
| | E | xpected Closing [| Date | | | | | | |
| | | Process Ov | ner | N/A Stacie | | | | | |
| | Anne Takah | ashi/Sample Clie | ent 01 | | | | | | |
| | | Pro | cess | Job Sent | | | | | |
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| | Catherine Porters Apps - 🗞 🕐 | |
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| | Customize View | |
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| malated because the End El | e Client 01 | |
| npieted because the End Fi | | |
| "Close". | anaka(10009) | |
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| | | |
| Client | Sample Client 01 | |
| Job | Sample Job 03 | |
| Resume | Hanako Yamada(10003) | |
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| | | |
| Client | Sample Client 01 | |
| Job | Sample Job 01 | |
| Resume | Hanako Yamada(10003) | |
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| Client | Sample Client 01 | |
| dol | Sample Job 04 | |
| Resume | Meg Tanaka(10009) | |
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| Client | Sample Client 01 | |
| Client | | |

| ORTERS Trial expires in 317 days | _ | |
|----------------------------------|---------------------------|---|
| Client Recruiter Job Person Resu | m Process Search Criteria | |
| Process | Ac Saved Search - | • |
| | Sort Order | Updated Date(Desc) |
| | Keyword | Contains All (AND) |
| | Keyword Search Mode | All Attachment Data |
| | Process ID | |
| | Process | Contains Any (OR) Matching Job Sent Recommend 1s Decision Offer |
| | Process Date | - v |
| | End Flag | Does not contain ▼ ✓ Close |
| | End Reason | Contains Any (OR) Success Client NG Person NG Job C Person Consultant NG |
| | Process Owner | |
| | Client | ID ● Text Contains All (AND) |
| | Recruiter | ID ● Text Contains All (AND) |
| | Job | ● ID ● Text Contains All (AND) ▼ |
| | Job Owner | |
| | Resume | ID ● Text Contains All (AND) |
| | Resume Owner | |
| | Date Created | - v |
| | Date Updated | - v |
| | Person | ID Text |
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| PORTERS Trial expires in 317 days | | | Catherine Porters Apps - 🗞 🕐 |
|--|--|----------------------|------------------------------|
| 🛞 Client Recruiter Job Person Resume | Process Sales Activity | | |
| Process (10) Add | d New Process Bulk Action | | Customize View |
| Matching(2) Job Sent(5) Recommend(1) | 1st Interview(1) 2nd Interview(0) Decision(1) Offer(0) | | |
| Meg Tanaka/Sample Client 01 | | | |
| Dotail Process | Recommend | Client | Sample Client 01 |
| cess Date | 20/ | dot | Sample Job 03 |
| ess Memo | | Resume | Meg Tanaka(10009) |
| Copy End Ele | Display the Process you wish to delete | in the list view, | |
| Delete d Rom | click the title. | | |
| Document Ited Sales | Then click "Delete" in the Actic | n Menu | |
| Send Email sing Date | Then click Delete in the Actic | | |
| Email History ss Owner | N/ | | |
| Email to Recruiter <u>le Client 01</u> | This is for deleting the process itself. For | deleting part of the | |
| Email to Person Process | ^{Jo} process history, please refer t | 0 p.13. Client | Sample Client 01 |
| Open in listview cess Date | 20 | Job | Sample Job 03 |
| Edit Job | | Resume | Hanako Yamada(10003) |
| Detail Job | | | |
| d Reason | | | |
| Estimated Sales | | | |
| Mail Process Owner | N/A Catherine Porters | | |
| | N/A cathenne Porters | | |
| Search Hanako Yamada/Sample Client 01 | | | |
| Process | Job Sent | Client | Sample Client 01 |
| Process Date | 2014/10/29 11:41:00 | Job | Sample Job 01 |
| Find Flog | | Resume | Hanako Yamada(10003) |
| End Flag | | | |
| Estimated Sales | | | |
| Expected Closing Date | | | |
| Process Owner | N/A Catherine Porters | | |
| Meg Tanaka/Sample Client 01 | | | |
| Process | Job Sent | Client | Sample Client 01 |
| Process Date | 2014/12/09 11:42:00 | Job | Sample Job 04 |
| Process Memo | | Resume | Meg Tanaka(10009) |
| End Flag | Close | | |
| End Reason | Client NG | | |
| Estimated Sales | | | |
| Expected Closing Date | | | |
| Process Owner | N/A Stacie | | |
| Anne Takahashi/Sample Client 01 | | | |
| Process | Job Sent | Client | Sample Client 01 |

| POR | TERS Trial expires in 317 days | |
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| | | Process Sales Activity |
| P | rocess (10) Add | d New Process Bulk Action 🝷 |
| | Matching(2) 🔲 Job Sent(5) 🔲 Recommend(1) 🗌 | 1st Interview(1) 2nd Interview(0) Decision(1) Offer(0) |
| | Meg Tanaka/Sample Client 01 | |
| | Process | Recommend |
| | Process Date | 2015/07/28 11:55:00 |
| | Process Memo | |
| | End Flag | Close |
| | End Reason | Client NG |
| | Estimated Sales | |
| | Expected Closing Date | N/A Chaoin |
| | Process Owner | N/A Stacle |
| | Hanako Yamada/Sample Client 01 | |
| | Process | Job Sent |
| | Process Date | 2014/06/20 14:52:00 |
| | Process Memo | |
| | End Flag | PORTERS |
| | End Reason | |
| | Estimated Sales | Are you sure you want to delete thi |
| | Process Owner | N/A Catherine Porters |
| | Clark Variada (Carriela Clark Of | |
| | | |
| | Process | Job Sent Yes |
| | Process Date | 2014/10/29 11:41:00 |
| | End Flag | |
| | End Reason | |
| | Estimated Sales | |
| | Expected Closing Date | |
| | Process Owner | N/A Catherine Porters The process w |
| | Meg Tanaka/Sample Client 01 | Caution: Delete oper |
| | Process | Job Sent |
| | Process Date | 2014/12/09 11:42:00 |
| | Process Memo | |
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| | End Reason | Client NG |
| | Estimated Sales | |
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| | Process Owner | |
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| | Client | Sample Client 01 | | | |
| | Job | Sample Job 03 | | | |
| | Resume | Meg Tanaka(10009) | | | |
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| | Job | Sample Job 03 | | | |
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| | Resume | Hanako Yamada(10003) | | | |
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| nfirmation dialog | | | | | |
| ll ha dalatad | | | | | |
| li be deleted. | | | | | |
| tion can't be und | one. | | | | |
| | | Sample Client 01 | | | |
| | Job | Sample Job 04 | | | |
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| | Client | Sample Client 01 | | | |

| PORTERS Trial expires in 317 days | Catherine Porters Apps - 🗞 (|
|---|---|
| Client Recruiter Job Person Resume Process Sales Activity | |
| Process (10) Add New Process Bulk Action | × Process Meg Tanaka/Sample Client 01 (10019) 🖂 (0) |
| Matching(2) Job Sent(5) Recommend(1) 1st Interview(1) 2nd Interview(0) Decision(1) Offer(0) | Edit Conv. Delete Document Send Email Email to Recruiter Email to Person Open in listview Edit Joh |
| Meg Tanaka/Sample Client 01 | Detail Joh |
| Process Recommend | |
| Process Date 2015/07/28 11:55:00 | - Basic Information |
| Process Memo | Process ID 10019 Client Sample Client 01 |
| End Flag Close | Process (Current) Recommend Recruiter Sample Recruiter 01 Process Date (Current) 2015/07/28 11:55:00 India Sample Job 02 |
| End Reason Client NG | Process Memo |
| Estimated Sales | (Current) |
| Expected Closing Date | End Flag Close Resume Meg Tanaka(10009) |
| Process Owner N/A Stacie | End Reason Client NG Resume Owner Catherine Porters |
| Uppako Vamada (Cample Client 01 | Estimated Sales |
| | Expected Closing Date |
| Process Job Sent | Process Owner N/A Stacie |
| Process Date 2014/06/20 14:52:00 | Contact Information |
| Process Memo | Telephone (Recruiter) 00-0000-0000 |
| End Flag | Fax (Person) |
| End Reason | Mobile Number 090-0000-0000 Mobile Number 080-0000-0001 |
| | (Recruiter) (Person) |
| Mail | Mobile E-mail sample@porters.jp Mobile E-mail (Person) keitai@porters.jp |
| Crom process history, the sublist will be displayed when | (Recruiter) |
| Search | - System Information |
| clicking the process title. | Date Created 2015/07/23 11:55:03 Date Updated 2015/07/31 15:48:41 Date state of the N/A Static Date updated here N/A Static |
| To delete an entry of in the process history, click the | Copdated by N/A Stacle Copdated by N/A Catherine Porters |
| action button of that ontry and choose Delete | Edit Copy Delete Document Send Email Email to Recruiter Email to Person Open in listview Edit Job |
| action button of that entry and choose Delete. | Detail Job |
| | |
| X This operation is for deleting entries of process history. | Sublist Process History 🖒 Add New |
| To delete the presses itself places refer to p 11 | Date Phase Memo Updated By Date Updated |
| To delete the process itself, please refer to p.11. | 2015/07/28 11:55:00 Recommend N/A Catherine 2015/07/31 15:48:41 |
| | 2015/07/23 11:55:00 Job Sept N/A Stacie 2015/07/23 11:56:09 |
| X If Phase Flow Control is effective, the entries in the | - 2013/07/23 11:33:00 300 Sent 2013/07/23 11:30:03 |
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| phase history can not be deleted. | Delete |
| | Sales List [2] |
| | Sales ID Client Name Position Resume Sales Record Date Joining Date Date |
| Estimated Sales | 10002 Sample Client Sample Job 0 Sample Perso 1.500.000 2014/06/16 2014/05/16 2014/05/19 |
| Expected Closing Date | 1 1 1 0002 1,500,00000 1,500,000 1,0000000000 |
| Process Owner N/A Stacie | 10006 Sample Client Sample Job 0 Sample Perso 2,000,000 2014/06/16 2014/05/16 2014/05/19 |
| Anne Takahashi/Sample Client 01 | <u>01</u> <u>1</u> <u>n 02(10002)</u> <u>16:19:11</u> |
| Process lob Sent | 10008 Sample Client Sample Job 0 Sample Perso 1,200,000 2014/07/16 2014/05/16 2014/05/19 |
| | - <u>01</u> <u>1</u> <u>n 02(10002)</u> <u>16:18:49</u> |

| POF | TERS Trial expires in 317 days | | | | | | | | Ca | therine Porte | rs Apps - % |
|-----|--------------------------------------|--|--|---|-------------------------------|--------------|------------------------------------|-------------------|--|----------------|------------------------|
| | Client Recruiter Job Person Resume | Process Sales Activity | | | | | | | | | |
| F | Process (10) Ad | d New Process Bulk Action 🝷 | | × Process Meg | Tanaka/San | nple Clier | nt 01 (100 | L9) 🖂 (| 0) | | 🔒 Print View |
| - | Matching(2) Job Sent(5) Recommend(1) | 1st Interview(1) 2nd Interview(0) 🔲 Decisi | ion(1) Offer(0) | Edit Copy De | lete Document | Send Email | Email to Recru | iter Email t | o Person Open | in listview Ed | lit Job |
| | Meg Tanaka/Sample Client 01 | | | Detail Job | | | | | | | |
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| | Process Date | 2015/07/28 11:55:00 | | Basic Information | on TR 10010 | | | | Clinet Cours | | |
| | Process Memo | | | Process Drocoss (Curr | s ID 10019 | | | | Client Samp | le Client UI | |
| | End Flag | Close | Process Date (Current) 2015/07/28 11:55:00 | | | | | Ich Sample Job 03 | | | |
| | End Reason | Client NG | | Process Me | emo | 1.55.00 | | Jo | Job Owner Catherine Porters Resume Meg Tanaka(10009) Ime Owner Catherine | | |
| | Estimated Sales | | | (Curr | ent) | | | | | | |
| | Expected Closing Date | | | End | Flag Close | | | | | | |
| | Process Owner | N/A Stacie | | End Rea | ison Client NG | | | Resum | | | |
| | Una Hanako Vamada (Sample Client 01 | | | Estimated S | ales | | | | | | |
| | | | | Expected Closing I | Date | | | | | | |
| | Process | Job Sent | | Process Ow | vner N/A Stacle | | | | | | |
| | Process Date | 2014/06/20 14:52:00 | | Contact Informa | ition | 0 | | | (Downow) 02.00 | 00.0000 | |
| | Process Memo | | | Telephone (Recrui | ter) 00-0000-0000 | 0 | | Telephone | (Person) 03-00 | 00-0009 | |
| | End Flag | | PORTERS | | × | rs in | | F-mail | (Person) e1@n | orters in | |
| | End Keason | | | | | 0 | | Mobile | Number 080-0 | 000-0001 | |
| | Estimated Sales | | | nt to doloto 2 | | | | | (Person) | | |
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| | Process Owner | N/A Catherine Porters | | | | | | | | | |
| | Hanako Yamada/Sample Client 01 | | | | | | | | | | |
| | Process | Job Sent | Yes | No | | 1:55:03 | | Date | Updated 2015/ | 07/31 15:48:4 | 1 |
| | Process Date | 2014/10/29 11:41:00 | | | | | | Up | dated by N/A C | atherine Porte | ers |
| | Process Memo | | | Edit Copy Delete Document Send Email Email to Recruiter Email to Person Open in listview Edit Job | | | | | | | lit Job |
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| | Expected Closing Date | | Confirmation is | shown the selec | ted process's | history | Memo | | Updated By | Date U | Jpdated |
| | Process Owner | N/A Catherine Porters | will be dele | tad if tha "Vas" h | Nutton is click | , A | | | N/A Catherine | 2015/0 | 07/31 15:48:41 |
| | Meg Tanaka/Sample Client 01 | | | | | cu. | | | Porters | 2015/0 | 7/22 11:56:00 |
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| | Process Date | 2014/12/09 11:42:00 | | 2015/07/ | 23 11:54:00 Job S | sent | | | N/A Stacie | 2015/0 | 7/23 11:55:03 |
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| | End Reason | Client NG | | Sales ID | Client Name Po | osition | Resume | Sales | Record Date | Joining Date | Date |
| | Estimated Sales | | | 10000 | Samala Clinut C | appale let 0 | Computer Damage | Amount | 2014/06/116 | 2014/05/46 | 2014/05/10 |
| | Expected Closing Date | | | | 01 Sample Client Sa | | n 02(10002) | 1,500,000 | 2014/06/16 | 2014/05/16 | 16:19:28 |
| | Process Owner | N/A Stacie | | ▼ 10006 | Sample Client Sa | ample Job 0 | Sample Perso | 2,000,000 | 2014/06/16 | 2014/05/16 | 2014/05/19 |
| | Anne Takahashi/Sample Client 01 | | | | <u>01</u> <u>1</u> | | <u>n 02(10002)</u> | | | | 16:19:11 |
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