



HIRING MANAGER'S GUIDE

the
applicant
manager

Functionality

Here's how using TAM for applicant tracking can help you...

We live in an always-on, hyper-connected world thanks to the internet, mobile devices, and the powerful infrastructures powering them. These innovations haven't merely changed how we connect with one another – they've changed the way people do business, including how companies hire and manage people. Even the very nature of work itself is evolving.

Reduce Paperwork



Resumes, Cover Letters, and Applicant Information are stored together.

Stay Organized



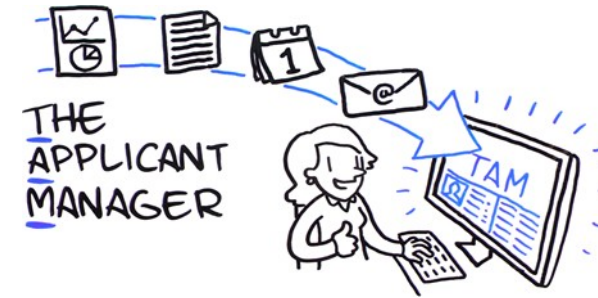
Use tables to easily visualize, sort and compare applicants.

Pick the Best Talent



Find the right candidate for the job with your own recruiting workflow.

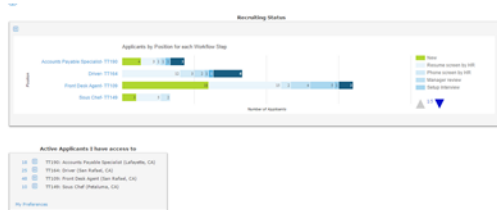
Introduction



In this presentation we will be going over a basic recruiting process in TAM

TAM has 3 main views to learn

The Desktop



The Applicant Table

A screenshot of the TAM Applicant Table. It shows a list of applicants with columns for Name, Email, Last Name, Address, Status, No. of Applications, and Date of Application. The table is filtered for 'Accounts Payable Specialist (Lakeland, CA)'. The interface includes search and filter options at the top.

The Applicant Profile

A screenshot of the TAM Applicant Profile view. It shows detailed information for a specific applicant, including their name, email, and a list of applications. The interface is designed to provide a comprehensive view of each candidate's history and current status.



THE DESKTOP

The Desktop

When you log in to TAM, you will see the home screen known as the **Desktop**

On this screen, we can see an overview of the positions we're hiring for.

Take a look at **Accounts Payable Specialist**, a position that we've just posted.

We can see that we have 18 New applicants shown in green.

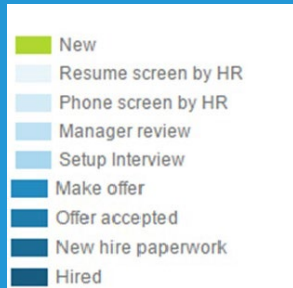


- Active Applicants I have access to**
- 18 TT190: Accounts Payable Specialist (Lafayette, CA)
 - 25 TT164: Driver (San Rafael, CA)
 - 30 TT109: Front Desk Agent (San Rafael, CA)
 - 10 TT149: Sous Chef (Petaluma, CA)
- [My Preferences](#)

Getting Started

Workflow

Our goal is to pass the New applicants through our workflow to make good hires.



These are some example steps. Your company's workflow is up to your team to decide.



Use these arrows to view all of your workflow steps

Active Applicants I have access to

- 18 TT190: Accounts Payable Specialist (Lafayette, CA)
- 25 TT164: Driver (San Rafael, CA)
- 30 TT109: Front Desk Agent (San Rafael, CA)
- 10 TT149: Sous Chef (Petaluma, CA)

My Preferences

Desktop Widgets

The Desktop is composed of widgets.

We only have two on display for this example, but you can choose to enable more with this switch.



The **Active Applicant** widget gives us another way to look at our applicants by workflow steps.



Desktop

Admin

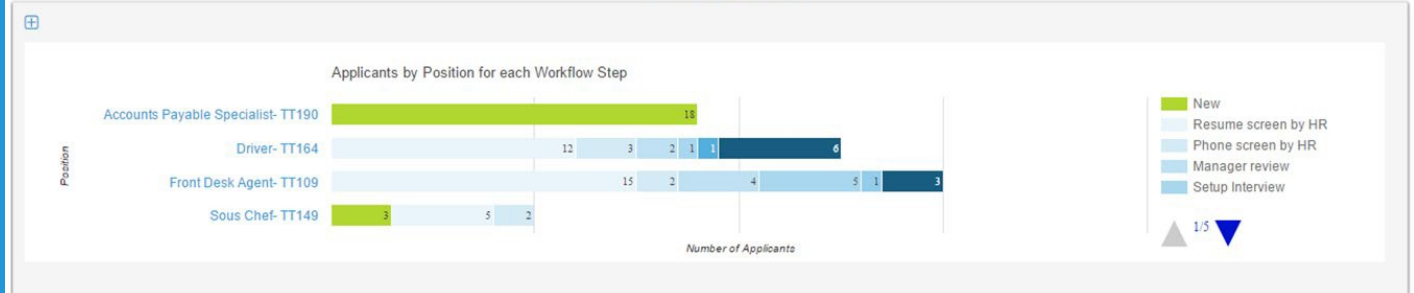
Positions

Talent Pool

Hi JORDAN!



Recruiting Status



Active Applicants I have access to

- 18 TT190: Accounts Payable Specialist (Lafayette, CA)
- 25 TT164: Driver (San Rafael, CA)
 - 12 Resume screen by HR
 - 3 Phone screen by HR
 - 2 Manager review
 - 1 Setup Interview
 - 1 Review after interview
 - 6 Hired
- 30 TT109: Front Desk Agent (San Rafael, CA)
- 10 TT149: Sous Chef (Petaluma, CA)

My Preferences

Viewing Our Applicants

Status	First Name	Last Name	Attachments	Type	Notes	Which of these accounting titles are you experienced with?	What is your desired salary?	How many years experience do you have in Accounts Payable?	My Rating	Pass to next step	Fail at current step
New	Joe	Clepton	[Attachments]			Quickbooks	69k-70.5k	0-2 yrs		Green	Red
New	Glenn	Barber	[Attachments]			Intacct; NetSuite	67,000-89,000	2-4 yrs		Green	Red
New	Bertha	Chavez	[Attachments]			Great Plains; NetSuite; Sage	65,000	2-4 yrs		Green	Red
New	Barbara	Harvin	[Attachments]			Great Plains; Intacct; NetSuite	40,000-50,000	0-2 yrs		Green	Red
Interview with GM	Dwight	Harmon	[Attachments]	Good Cultural Fit; Accomplished	Interview went very well with Dwight. We have...	Great Plains; Intacct; NetSuite	55k	4+ yrs	*****	Green	Red
Phone screen by HR	Jean	Standard	[Attachments]	Local	Good candidate for a growth cultural fit. HR...	Great Plains; Intacct; NetSuite; Quickbooks; Sage	60,000 - 72,000	2-4 yrs	*****	Green	Red
Resume screen by HR	Adam	Blum	[Attachments]	Weekend; Dispersed; Finance	We may also want to consider him for other...	NetSuite; Quickbooks	64.5,000	4+ yrs	*****	Green	Red
Manager review	Gregory	Riley	[Attachments]	Weekend; Willing to relocate; Finance	Try to negotiate a better salary. - Jordan.	Great Plains; Intacct	67,000/year	0-2 yrs	****	Green	Red
Resume screen by HR	Robert	Martin	[Attachments]	Portfolio	Has a great resume but I like his portfolio. -	Great Plains; NetSuite	60k	4+ yrs	****	Green	Red
Resume screen by HR	Sloan	Levis	[Attachments]			Great Plains; Intacct; NetSuite	75,000	0-2 yrs	**	Green	Red

We can click on any of the position names to view all of the candidates who have applied for that position

Clicking on a colored part of the graph will take you to a list of candidates for that step only.



Active Applicants I have access to

- 18 TT190: Accounts Payable Specialist (Lafayette, CA)
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- 10 TT149: Sous Chef (Petaluma, CA)

My Preferences

We're going to click on **Accounts Payable Specialist** and check out our applicants on the Applicant Table



THE APPLICANT
TABLE

The Applicant Table

We'll use this screen to get an idea of our candidates and quickly narrow our selection.

Here we can see we are viewing applicants for **Accounts Payable Specialist**. We can also use this menu to jump to our other positions.

* Prescreening Questions

Applicants are asked a set of questions during their application so that we can get a better idea if they match our qualifications. This is a good place to start your candidate search.

Work with your team to develop effective prescreening questions.

THE TAMALPAIS HOTEL & SPA

Desktop | Admin | Positions | **Talent Pool** | Hi JORDAN! | 🔍

Select position: TT190: Accounts Payable Specialist (Lafayette, CA)

Search for text in resumes: _____

Showing active applicants only
Load & show inactive applicants also

Status	First Name	Last Name	Attachments	Tags	Notes	* Which of these accounting tools are you experienced with?	* What is your desired salary?	* How many years experience do you have in Accounts Payable?	Pass to next step	Fail at current step
New	Brian	Levis				Great Plains; Intacct; NetSuite	75,000	0-2 yrs		
New	Gregory	Riley				Great Plains; Intacct	67,000/year	0-2 yrs		
New	Robert	Martin				Great Plains; NetSuite	60k	4+ yrs		
New	Ira	Clayton				Quickbooks	69k-70.5k	0-2 yrs		
New	Gwen	Barker				Intacct; NetSuite	67,000-89,000	2-4 yrs		
New	Adam	Blum				NetSuite; Quickbooks	\$65,000	4+ yrs		
New	Jean	Standard				Great Plains; Intacct; NetSuite; Quickbooks; Sage	65,000 - 72,000	2-4 yrs		
New	Dexter	Harmon				Great Plains; Intacct; NetSuite	55k	4+ yrs		
New	Barbara	Marvin				Great Plains; Intacct; NetSuite	40,000-50,000	0-2 yrs		
New	Bertha	Chavez				Great Plains; NetSuite; Sage	65,000	2-4 yrs		
New	Kelsey	Hull				Quickbooks	\$44k	4+ yrs		
New	Dennis	Doucette				Great Plains	\$45k	4+ yrs		

These are the questions asked for this example position.

Thumbs Up, Thumbs Down

Thumbs Up

TAM uses a Pass/Fail system to process applicants. **Thumbs Up** advances an applicant to the next step in the recruitment workflow.

Thumbs Down

Thumbs Down “fails” and removes an applicant from our recruitment workflow. Failed applicants become “inactive” and will no longer appear on our Applicant Table.



- New
- Resume screen by HR
- Phone screen by HR
- Manager review
- Setup Interview
- Make offer
- Offer accepted
- New hire paperwork
- Hired



To see your failed applicants you can click this link. You will also be able to see the step they were failed at.



Select position TT190: Accounts Payable Specialist (Lafayette, CA)

Showing active applicants only
[Load & show inactive applicants also](#)

Status	First Name	Last Name	Attachments	Tags
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
New	Brian	Lewis	R C	
New	Gregory	Riley	R C	
New	Robert	Martin	R C	
New	Ira	Clayton	R C	
New	Gwen	Barker	R C	
New	Adam	Blum	R C	
New	Jean	Standard	R C	
New	Dexter	Harmon	R C	
New	Barbara	Marvin	R C	
New	Bertha	Chavez	R C	
New	Kelsey	Hull	R	
New	Dennis	Doucette	R	

The Applicant Table

Customization

You can configure the table to appear in the way that makes the most sense to you.

Show and hide columns with the gear icon. This lets you choose to display the information that's most important to you.

You will also want to drag and drop the column headings to arrange the table to your liking.

After you've made changes to your table, refresh the page. You must do this before filtering and sorting.



Select position

Search for text in resumes

Showing active applicants only
Load & show inactive applicants also

Status	First Name	Last Name	Attachments	Tags	Notes	Which of these accounting tools are you experienced with?	What is your desired salary?	How many years experience do you have in Accounts Payable?	Pass to next step	Fail at current step
New	Brian	Levis				Great Plains; Intacct; NetSuite	75,000	0-2 yrs		
New	Gregory	Riley				Great Plains; Intacct	67,000/year	0-2 yrs		
New	Robert	Martin				Great Plains; NetSuite	60k	4+ yrs		
New	Ira	Clayton				Quickbooks	69k-70.5k	0-2 yrs		
New	Gwen	Barker				Intacct; NetSuite	67,000-89,000	2-4 yrs		
New	Adam	Blum				NetSuite; Quickbooks	\$65,000	4+ yrs		
New	Jean	Standard				Great Plains; Intacct; NetSuite; Quickbooks; Sage	65,000 - 72,000	2-4 yrs		
New	Dexter	Harmon				Great Plains; Intacct; NetSuite	55k	4+ yrs		
New	Barbara	Marvin				Great Plains; Intacct; NetSuite	40,000-50,000	0-2 yrs		
New	Bertha	Chavez				Great Plains; NetSuite; Sage	65,000	2-4 yrs		
New	Kelsey	Hull				Quickbooks	\$44k	4+ yrs		
New	Dennis	Doucette				Great Plains	\$45k	4+ yrs		
New	Gerald	Lespinette				NetSuite	\$55k	4+ yrs		
New	Susan	Pace				Sage	\$44k	2-4 yrs		
New	Nancy	Masterson				Intacct	\$5	4+ yrs		
New	Euan	Stevens				Great Plains	\$555	4+ yrs		
New	Patrick	Mcgeown				NetSuite	\$55	2-4 yrs		
New	Francisco	Alejo				Intacct	\$5	0-2 yrs		

Showing 1 to 18 of 18 entries

Show entries

The Applicant Table

In this screenshot we've moved columns around and toggled some categories. Also, we've filtered our list of 18 applicants down to 6.

Filtering

We can enter text into any of these fields to display applicants that match our search.

- * Now we're looking only at applicants where we've found a cover letter attachment and a "4" in years of experience.

Sorting

Click on any column heading to sort alphabetically/numerically.

We have sorted our table by desired salary.

THE TAMALPAIS HOTEL & SPA

Desktop | Admin | Positions | **Talent Pool** | HI JORDAN! |

Select position Search for text in resumes

Showing active applicants only
Load & show inactive applicants also

Status	Select	First Name	Last Name	Attachments	How many years experience do you have in Accounts Payable?	What is your desired salary?	Which of these accounting tools are you experienced with?	Tags	Notes	My Rating	Pass to next step	Fail at current step
New	<input checked="" type="checkbox"/>	Adam	Blum	<input type="text" value="c"/> *	4 *	25,000	NetSuite; Quickbooks				<input type="checkbox"/>	<input type="checkbox"/>
New	<input checked="" type="checkbox"/>	Dexter	Harmon	<input type="text" value="R"/> <input type="text" value="C"/>	4+ yrs	55k	Great Plains; Intacct; NetSuite				<input type="checkbox"/>	<input type="checkbox"/>
New	<input checked="" type="checkbox"/>	Robert	Martin	<input type="text" value="R"/> <input type="text" value="C"/>	4+ yrs	60k	Great Plains; NetSuite				<input type="checkbox"/>	<input type="checkbox"/>
New	<input checked="" type="checkbox"/>	Bertha	Chavez	<input type="text" value="R"/> <input type="text" value="C"/>	2-4 yrs	65,000	Great Plains; NetSuite; Sage				<input type="checkbox"/>	<input type="checkbox"/>
New	<input checked="" type="checkbox"/>	Jean	Standard	<input type="text" value="R"/> <input type="text" value="C"/>	2-4 yrs	65,000 - 72,000	Great Plains; Intacct; NetSuite; Quickbooks; Sage				<input type="checkbox"/>	<input type="checkbox"/>
New	<input checked="" type="checkbox"/>	Gwen	Barker	<input type="text" value="R"/> <input type="text" value="C"/>	2-4 yrs	67,000-89,000	Intacct; NetSuite				<input type="checkbox"/>	<input type="checkbox"/>

Showing 1 to 6 of 6 entries (filtered from 18 total entries)
Check all rows
Clear all checks

Show entries

Clicking on an applicant's First or Last name will bring up their Applicant Profile.



THE APPLICANT PROFILE

The Applicant Profile

This screen is where we evaluate our candidates in detail.

1 Documents

Click tabs to look through resumes, cover letters and other attachments.

2 Next/Previous

Go to the next or previous applicant's profile with these arrows. This action cycles through only the smaller group of applicants that we previously selected on the Applicant Table.



Gwen Barker
☆☆☆☆☆
TT190 : Accounts Payable Specialist (Lafayette, CA)
Applied on: 2017-04-18
1402 Tara Hills, Pinol, CA 94564
15 miles away map
gwbarke@imgwen.me
510-742-4821
Status:
Resume screen by HR
TAM Team info

Notes History | Email History (empty) | Status History | Ratings

Tags:
Security Clearance:
Kolbe Score:
Salary:
Source: Indeed
Referred by:
Recruiter: Recruiter, Robert
Manager: Nakamoto, Jordan



Resume | Cover Letter | Prescreening Questions | Pass/Fail Questions

Word Online

Accessibility Mode | Download | Save to OneDrive | Print

Gwen Barker
1402 Tara Hills Drive Pinole, CA 94564
510.742.4821
app9@theapplicantmanager.com

Experience

Accounts Receivable/Payable, Sales Administrative Assistant, IT Liaison:
Brown & Brown of WA d.b.a. DiMartino Associates, August 2005 - Current

- Accounts Receivable/Payable Specialist- Manage invoices for life & disability coverage for over 5000 enrolled members. Process received payment on invoices. Reconcile account for month end and year end. Pay premium to the insurance carrier and commission back to the company from premium received. Manage enrollment/eligibility of the group. Answer general benefit questions of individual members on the plan. This account brings in over \$1 million in annual revenue to the company.
- Sales Administrative Assistant for a Medical Insurance Trust - Administrative support for two executives on the team. Process incoming quote requests from broker partners for small group medical coverage. Drive sales through email and phone interactions by communicating benefit descriptions to brokers, working with the medical carriers on prospects and connecting with brokers in regards to prospective clients. Receive new group paperwork from brokers, prepare the documents for the carrier, produce final rates for the new group, work with carrier to get benefits communicated to the group and help maintain eligibility with the third party administrator. Pay commissions for the medical Trust to the broker partners. Serve as intermediary between clients and management, screen emails and perform research before escalating any issue to management. Maintain tracking of quotes and renewals for reports, produce renewals with carrier underwriters for submission to brokers for incumbent groups, submit and track renewals and/or terminations, process competitive information with the carrier to adjust our rates to stay competitive, resolve group/individual claim & enrollment issues. Manage all reporting documents for the Trust administrator. Data entry management of clients in customer database systems. Responsible in part for increasing gross income of the Trust by 19% over the last two years. This insurance Trust brings in over \$1 million in annual revenue to the

team to troubleshoot onsite issues, provide staff training for software applications, document all work done by third party IT, assist in setup of new workstations and serve as in house administrator of all client database systems.

- August 2005 - February 2006 - Front Desk Receptionist - promoted to sales account manager after my

PAGE 1 OF 2 | HELP IMPROVE OFFICE 87%

The Applicant Page

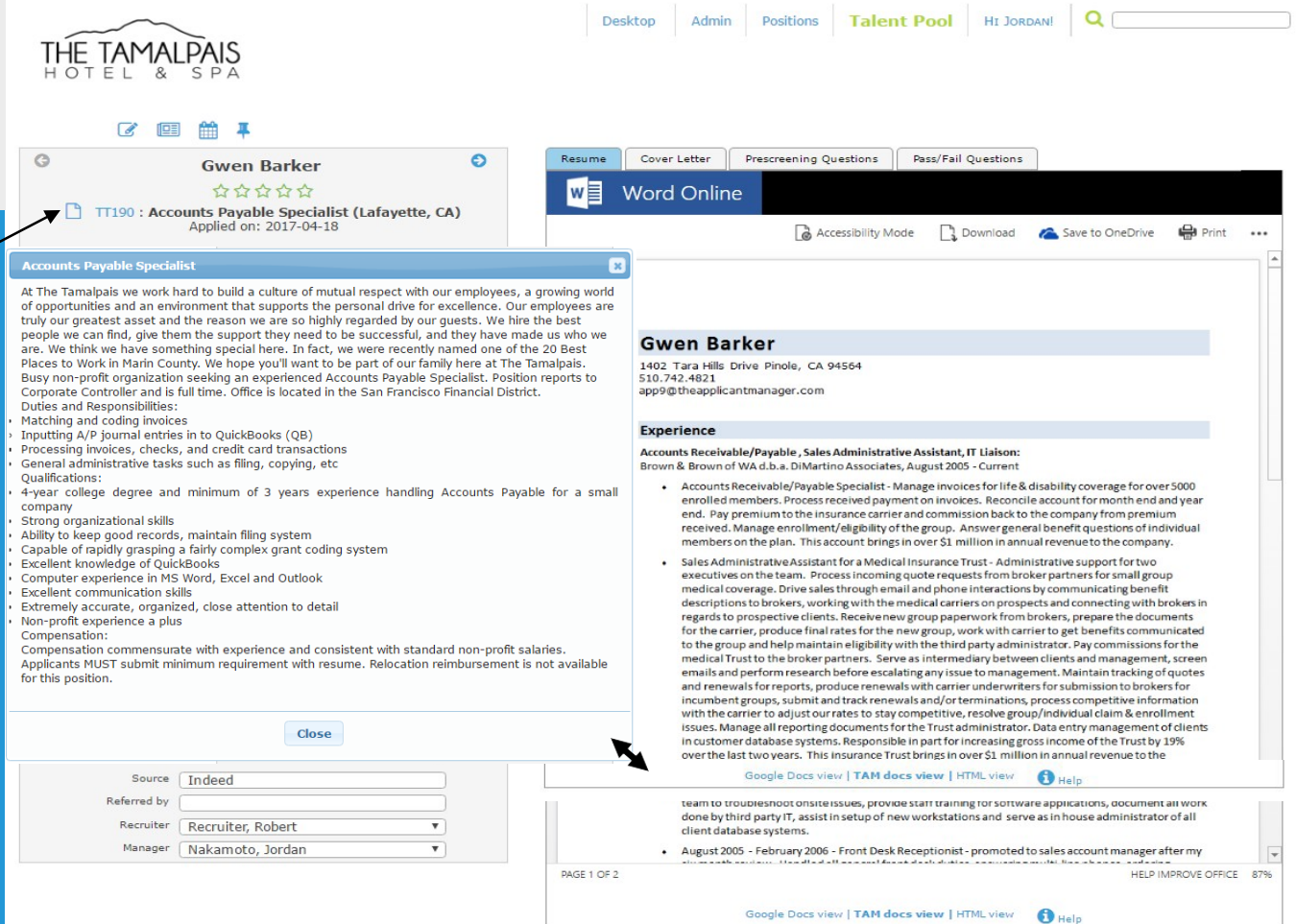
Evaluating our Applicant

In this slide, we've clicked this icon to bring up the Job description for the position our applicant has applied for.

You can move this window around and resize it from the corners.

Icons

In TAM, you can usually learn what an icon does by hovering over it with your mouse. Go ahead and try it out!



The screenshot displays the TAM Applicant Page for Gwen Barker. At the top, there are navigation links: Desktop, Admin, Positions, Talent Pool, and HI JORDANI. A search bar is also present. The applicant's name, Gwen Barker, is prominently displayed, along with her rating (5 stars) and the position: TT190 : Accounts Payable Specialist (Lafayette, CA), applied on 2017-04-18. A window titled "Accounts Payable Specialist" is open, showing the job description. This window includes a "Close" button and a "Job description" icon. The main profile area shows Gwen Barker's contact information (1402 Tara Hills Drive Pinole, CA 94564, 510.742.4821, app9@theapplicantmanager.com) and her experience. The experience section lists two roles: "Accounts Receivable/Payable, Sales Administrative Assistant, IT Liaison" at Brown & Brown of WA d.b.a. DiMartino Associates (August 2005 - Current) and "Front Desk Receptionist - promoted to sales account manager" (August 2005 - February 2006). The page footer includes "PAGE 1 OF 2", "HELP IMPROVE OFFICE 87%", and navigation links for Google Docs view, TAM docs view, HTML view, and Help.

Evaluating our Applicant

Taking Notes and Rating

1 Notes

Click this icon from the toolbar to enter a note. We've added one in this slide and it shows up in our Notes History.

Rating 

We've rated Gwen with 4 stars

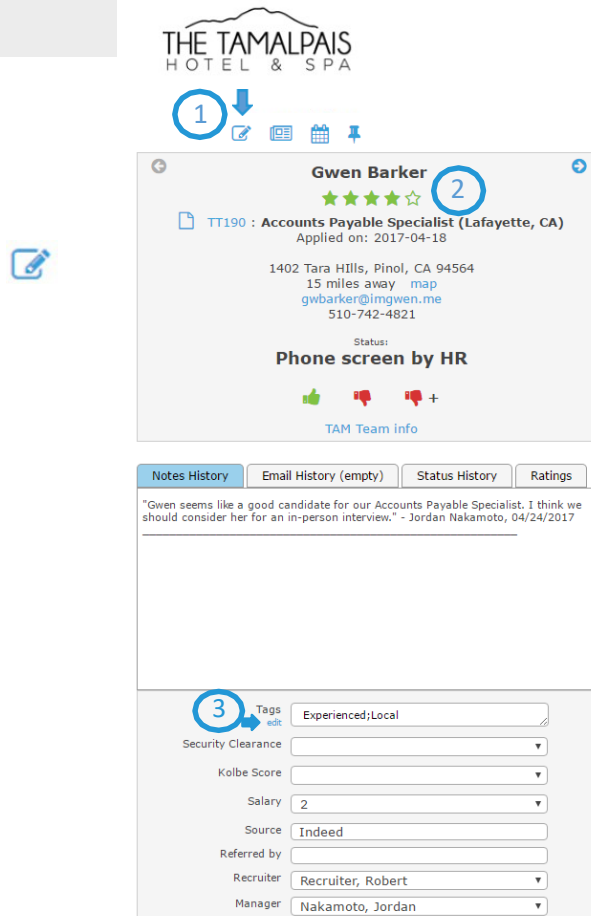
2 Tags

Click the  button below the Tags area to add tags.

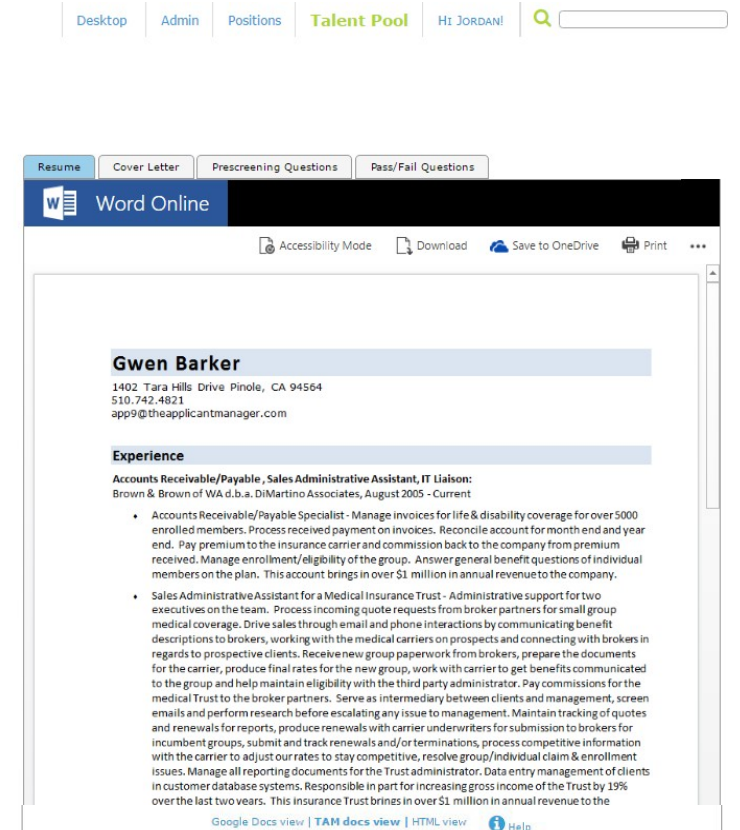
We've added a "Favorites" and "Local" tag.

3 Tags

Tags are a great way to create shortlists and identify your favorite applicants. They can help us filter and sort when we're back on the Applicant Table.



The screenshot shows the profile for Gwen Barker, an Accounts Payable Specialist. The profile includes contact information, a status of "Phone screen by HR", and a 4-star rating. A toolbar at the top of the profile has icons for notes, tags, and other actions. A "Notes History" tab is active, showing a note from Jordan Nakamoto dated 04/24/2017. Below the note is a "Tags" section with an "edit" button and a text input field containing "Experienced;Local". Other fields include Security Clearance, Kolbe Score, Salary (set to 2), Source (Indeed), Recruiter (Robert), and Manager (Jordan Nakamoto).



The screenshot shows the resume for Gwen Barker in Word Online. The resume includes contact information and an "Experience" section. The experience section lists two roles: "Accounts Receivable/Payable, Sales Administrative Assistant, IT Liaison" at Brown & Brown of WA d.b.a. DiMartino Associates (Aug 2005 - Current) and "Sales Administrative Assistant for a Medical Insurance Trust" (Administrative support for two executives on the team). The resume is displayed in a browser window with navigation tabs for Resume, Cover Letter, Prescreening Questions, and Pass/Fail Questions.

The Applicant Page

Passing our Applicant

1 Workflow Step/Status

We've rated Gwen with 4 stars

Gwen has met our screening qualifications so we've given her a thumbs up.

This passes her on to the next step in our recruiting process.

Now she's on the Phone screen step so we know to give her a call.

2 Document Viewers

Try both Google Docs and TAM docs to decide which you prefer. If you're having trouble with displaying a resume, try using the other viewer.

The screenshot shows the applicant profile for Gwen Barker. At the top is the logo for THE TAMALPAIS HOTEL & SPA. Below the logo are icons for edit, print, calendar, and pin. The profile card for Gwen Barker includes a 4-star rating, job title 'Accounts Payable Specialist (Lafayette, CA)', and application date '2017-04-18'. Contact information includes address '1402 Tara Hills, Pinol, CA 94564', distance '15 miles away', email 'gwbarker@imgwen.me', and phone '510-742-4821'. The status is 'Resume screen by HR'. A thumbs up icon is highlighted with a circled '1'. Below the profile card are tabs for 'Notes History', 'Email History (empty)', 'Status History', and 'Ratings'. At the bottom are fields for 'Tags', 'Security Clearance', 'Kolbe Score', 'Salary', 'Source' (set to 'Indeed'), 'Referred by', 'Recruiter' (set to 'Recruiter, Robert'), and 'Manager' (set to 'Nakamoto, Jordan').

Desktop Admin Positions Talent Pool Hi JORDAN

The screenshot shows the document viewer interface with tabs for 'Resume', 'Cover Letter', 'Prescreening Questions', and 'Pass/Fail Questions'. The 'Prescreening Questions' tab is active, displaying a list of questions: 'Which of these accounting tools are you experienced with? Intacct; NetSuite', 'What is your desired salary? 67,000-89,000', and 'How many years experience do you have in Accounts Payable? 2-4 yrs'. A circled '2' highlights the document viewer options: 'Google Docs view', 'TAM docs view', 'HTML view', and 'Help'.



MORE TAM FEATURES

Contacting Applicants

We're going to return to the **Applicant Table** to send out some emails. Here's how to get there from the [main navigation](#) at the top of the page.

Later we will also be learning about the Search feature



Lets get started... [————>](#)

Contacting Applicants

First, we have to select our position from the table menu.

- 1 **Filter**
Now that our applicants are loaded, let's show only the ones at the Phone screen step.
- 2 **Phone Number**
We also want to enable the Phone column so we can easily call our list of applicants once we've notified them.
- 3 **Click the Group Email icon** to go to the email area with our selection



Desktop | Admin | Positions | **Talent Pool** | HI JORDAN! |

Select position **TT190: Accounts Payable Specialist (Lafayette, CA)**

Search for text in resumes

Showing active applicants only
Load & show inactive applicants also

Status	Select	First Name	Last Name	Attachments	Tags	Notes	My Rating	Pass to next step	Group Email	Phone	Which of these accounting tools are you experienced with?	What is your desired salary?	How many years experience do you have in Accounts Payable?
Phone screen by HR	<input checked="" type="checkbox"/>	Gwen	Barker		Favorites; Local	I have scheduled the interview for Thursday the...	★★★★			510-742-4821	Intacct; NetSuite	67,000-89,000	2-4 yrs
Phone screen by HR	<input checked="" type="checkbox"/>	Dexter	Harmon		Accomplished; Favorites	Interview went very well with Dexter. We have...	★★★★★			415-164-2346	Great Plains; Intacct; NetSuite	55k	4+ yrs
Phone screen by HR	<input checked="" type="checkbox"/>	Brian	Levis				★★			315-476-8415	Great Plains; Intacct; NetSuite	75,000	0-2 yrs
Phone screen by HR	<input checked="" type="checkbox"/>	Robert	Martin		Portfolio	Has a sparse resume but I like his portfolio! -...	★★★			589-298-1257	Great Plains; NetSuite	60k	4+ yrs
Phone screen by HR	<input checked="" type="checkbox"/>	Ira	Clayton			A warm and positive Cover Letter! - Jordan...	★★★			415-825-9116	Quickbooks	69k-70.5k	0-2 yrs
Phone screen by HR	<input checked="" type="checkbox"/>	Jean	Standard		Local	Good candidate for a smooth cultural fit. May...	★★★★			415-388-1881	Great Plains; Intacct; NetSuite; Quickbooks; Sage	65,000 - 72,000	2-4 yrs

Showing 1 to 6 of 6 entries (filtered from 9 total entries)
Check all rows
Clear all checks

Show **All** entries

Emailing in TAM

It's a good idea to use templates for frequently sent emails.

1 Templates

Load and create templates from this area. In this screenshot we've already created a template and have loaded it.

Tokens

Our template uses the {applicant_first_name} token to insert each applicant's name in their version of our message.

We're also using the {position} token so we can re-use this email template for our other positions.

A full list of tokens is available on the template page.

The screenshot displays the TAM email composition interface for The Tamalpais Hotel & Spa. The top navigation bar includes 'Desktop', 'Admin' (highlighted), 'Positions', 'Talent Pool', and 'Hi JORDAN!'. A search bar is on the right. Below the navigation, there are buttons for 'Send Email' and 'Email History'. The email composition area shows the following details:

- From:** Jordan <jordan@thetamalpais.com> Use: noreply@ourcompany.com
- To:** (Send separate emails to:) Gwen Barker, Dexter Harmon, Brian Lewis, Robert Martin, Ira Clayton, Jean Standard
- Subject:** Phone Interview for The Tamalpais
- Message:**

Dear {applicant_first_name},

Thank you so much for your interest in our position of {position} at The Tamalpais. We'd like to get to know you a bit better so we'll be contacting you over the phone to set up a short interview.

Sincerely,
Jordan
Hiring Manager at The Tamalpais

On the right side, the 'Load from Email Template' dropdown is set to 'Phone screen email', and a 'Create/Edit a Template' button is highlighted with a hand cursor. At the bottom, a 'Send' button is also highlighted with a hand cursor.

We're going to click Send and check the Email History to make sure our message has been sent.

Emailing from the Applicant Profile

Clicking an applicant's email address on their applicant profile will start a message to that applicant.

You can also see all past emails from the Email History tab.



Brian Lewis
★ ★ ★ ★ ★
TT190 : Accounts Payable Specialist (Lafayette, CA)
Applied on: 2017-04-18
290 W. Jefferson St., Mill Valley, CA 94941
23 miles away [map](#)
brian3w15@gmail.com
315-476-8415
Status:
Manager review
[TAM Team info](#)

Notes History | **Email History** | Status History | Ratings

- 04/27/2017 Applicant Brian Lewis has Completed Their Phone Screen [more...](#)
- 04/27/2017 Phone Interview for The Tamalpais [more...](#)
- 04/27/2017 Phone Interview for The Tamalpais [more...](#)

Tags
edit

Security Clearance
Kolbe Score
Salary
Source
Referred by
Recruiter
Manager

Desktop | Admin | Positions | **Talent Pool** | Hi JORDAN! |

Resume | **Cover Letter** | Prescreening Questions | Pass/Fail Questions

Brian Lewis
290 W. Jefferson St.
Mill Valley, CA 94941
315-476-8415

4/18/2017

Bailey
Hiring Manager
The Tamalpais Spa

Dear Mr./Ms Bailey:

I hope you are getting excited for the weekend! It's your long lost friend Brian hoping to secure a position working with you at The Tamalpais day Spa. I'd like to bring to your attention my experience as an operative at the federation of television of radio artists. This was a key turning point in my career where I went from a junior level employee to an independent contractor in a matter of days. My superiors were very proud of me.

I've always wanted to work out on the West Coast as I am originally from New York. This opportunity with the Tamalpais would give me a perfect opportunity to stretch my legs and dive right in to a big new world at the company headquarters.


My resume is enclosed and thank you for your time. If you have a moment, I would love to meet for coffee and tea at 4pm Thursday afternoon. If that time doesn't work for you, please send me a friend request on Facebook and we'll go from there.


Sincerely,
Brian Lewis

Enclosure

Searching

We're going to go over a few ways to use TAM's Search functions.

You can use the search bar  to look up an applicant by their name.

For advanced searches, select the Search option  from the main navigation.



Advanced Search

We'll be using the search to create a list of all the applicants we've marked with the Favorites tag, across all positions.

We've clicked the blue **Tags** filter and then selected "Favorites" from the dropdown.

You can also search for keyword text in resumes, by date range, and other useful queries.

Select from Talent Pool

Applicants Inactive Applicants Non-Applicants Archived Non-Applicants

Filter by Position

Select Position(s)

Positions containing keyword

Filter Talent Pool

Add-on features
Custom fields
Date range
Distance from job
Hired
Incomplete applicants
Keyword search
Ratings
Red Flagged applicants
Source
...close tags

With these tags
(if multiple tags) AND OR

Tags matching

Workflow status

At these Workflow Steps (use ctrl-click or shift-click to select more than one)

Currently at this step
 Failed at this step
 Closed at this step

New
Resume screen
Phone screen
Manager review
Setup Interview
Application on file
In person Interview

Load a Saved Search

or Save as

[How to run Searches](#)

Advanced Search

We've run our search and can now see our Favorite applicants from 4 different positions.

1 Maybe we want to print this list with the print icon.



Search applicants, all dates, with tags: "Favorites".
Search run on May 8, 2017



Select	Search Result	Position Title	Position Number	Department	First Name	Last Name	Attachments	Status	Email	Phone	Tags	Salary
<input type="checkbox"/>												
<input checked="" type="checkbox"/>		Front Desk Agent	TT109	Front Desk	Daniel	Berone		Setup Interview	app8@theapplicantmanager.com	415-392-3825	Concierge; Favorites	
<input checked="" type="checkbox"/>		Sous Chef	TT149	Food & Beverage	Kenneth	Brewer		Resume screen by HR	garbage534621@gmail.com	916-380-2252	Favorites	
<input checked="" type="checkbox"/>		Driver	TT164		Eduardo	Mejia-Lopez		Resume screen by HR	app5@theapplicantmanager.com	805-746-6702	Favorites	
<input checked="" type="checkbox"/>		Front Desk Agent	TT109	Front Desk	John	Maxwell		Resume screen by HR	app1@theapplicantmanager.com	650-866-3904	Favorites	

Showing 1 to 4 of 4 entries
[Check all rows](#)
[Clear all checks](#)

Show **All** entries

Troubleshooting and Help

If you have any questions, please email us at support@theapplicantmanager.com or contact us at 888-886-9961

You can also learn how to make use of TAM's Features by reading the Knowledge Base however, be aware that Hiring Managers do not have access to all TAM Features.

the
applicant
manager

