

How to Use Presets to Find and Sell Reqs Faster

Presets are a powerful and efficient tool for getting the most out of our Find a Req section. Once you have built your presets, they are stored permanently and can be selected straight from the Find a Req menu in the future.

Steps

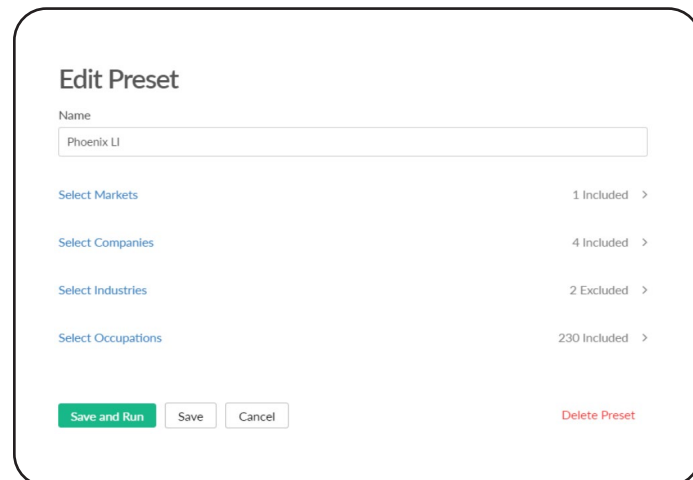
Presets consist of four sections. None of the sections are mandatory. However, the more information that is entered, the more precise the results will be.

Market - Currently, the user can select a metro area or multiple metro areas. Leave blank for all US (ex. if you are a national account manager)

Companies - If you have an existing territory and know your clients and prospects, you can enter those companies here and then select whether they are Customers, Prospects, or if you would like to Exclude this company from your search results.

Industries - You can choose whether to only include certain industries, or exclude certain industries from your search results.

Occupations - There are two options here. If you sell a specific staffing sector, like light industrial, our experts have pre-chosen the most appropriate jobs filled in the temp staffing space. You can choose to make each of these occupations a Strength, Target, or Exclude. You can also make your own list using the search bar or add occupations to the pre-selected lists in the same manner.



The screenshot shows the 'Edit Preset' interface. At the top, there is a title 'Edit Preset'. Below it is a 'Name' field containing 'Phoenix LI'. Underneath are four sections: 'Select Markets' (1 Included >), 'Select Companies' (4 Included >), 'Select Industries' (2 Excluded >), and 'Select Occupations' (230 Included >). At the bottom left, there are three buttons: 'Save and Run' (green), 'Save' (grey), and 'Cancel' (grey). At the bottom right, there is a 'Delete Preset' link in red.