purple square INFORMATION SOLUTIONS

PURPLE SQUARE LTD REGENCY HOUSE QUEEN STREET GODALMING SURREY GU7 1BD 01483 427 150

User Guide

an overview and guide to the use of Purple Square V4.5 recruitment agency software for microsoft windows.

Purple Square Limited
Regency House
Queen Street
Godalming
Surrey
GU7 1BD

Tel: 01483 427 150
Fax: 01483 861415
Email: info@purplesquare.co.uk
Http: www.purplesquare.co.uk

1 – Introduction

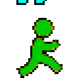
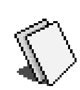
This User Guide

This user guide accompanies the Purple Square V4.5 employment agency software from Purple Square Limited. It describes the day-to-day use of the package and provides help in the integration of the data to other Microsoft software.

This manual does not describe every screen displayed by the system, or every error message shown, as this should in most cases be obvious. This manual is not intended to replace those that accompany your computer system; you should become familiar with starting up and operating your computer(s) before using the programs described here. Most importantly you must be used to working with the version of Microsoft Windows installed on your PC.

Overview of Functions

Icons – what they are and what they mean

	Candidate		Word
	Company		Placement
	Contact/People		Temporaries
	Vacancy		Mail Centre
	Activity		Reports
	Email		Add record
	Notes		Candidate Qualifications
	Mobile Phone		Linked documents
	Print		Marketing Material
	Set Up		Search
	Skills		Reset
	Shortlist		Save search criteria

Using the fields in the records

- To ***move to next field*** - use the Tab key, and Shift and Tab to move backwards

- To ***move within fields***, use arrow keys

- To ***chose from drop down menus*** (job title, region, etc), either click on down arrow at the end of the field, or use Ctrl key + down arrow on keyboard.

- ***Yellow date fields*** allows you to double click on them and chose a date from the calendar.

- *To* ***add to notes field*** click on the icon in the right hand corner of the field.

- ***The green tick*** means that you can add a record or information – for example, a new company or candidate from the look-up grids, a contact in a client record, or new activities, shortlist records, etc.

- *To* ***delete*** a contact, a skill, or an activity or shortlist record – right click the record (you will be asked to confirm that you want to delete the record).

Outlook Integration

Purple Square is fully integrated with Outlook, allowing you to schedule meetings and tasks from the Activity screen.

Overview of the Main Screens

Purple Square is an integrated suite of software designed to assist in the day to day running of a recruitment agency. All areas of the system may be accessed from the menu on the opening screen.

Related information entered in one module automatically updates the appropriate sections of other modules thereby ensuring efficient data entry.

Candidates

All basic candidate information is held within these screens and may be accessed via icons or the navigation bar.

Unlimited Qualifications, Past Employers, Activities, Interview/Placement records and Microsoft Word documents may be held against each record. Additionally an unlimited number of word document templates may be setup and used as standard letters to candidates.

For the purposes of matching and searching for candidates other than on free text search on CVs, you must set up a candidate skill profile. This is used to find candidates with a particular combination of skills or to match against a vacancy skill profile.

Companies

All basic customer information is held within these screens and may be accessed via the icons or the navigation bar. All combo boxes (with the exception of the Number of Staff fields) are linked to the Setup tables.

Unlimited Vacancies, Site Contacts and their details, Activities, Shortlist records and Microsoft Word documents may be held against each account. Additionally an unlimited number of word document templates may be setup and used as standard letters to company contacts.

You may additionally build up a client skill profile. This is particularly useful for search & select agencies that wish to match candidates with prospective customer sites rather than specific vacancies.

Vacancies

Allows for the input of all client vacancies and temporary assignments. All basic vacancy information is held within these screens and may be accessed via the icons and the navigation bar. Vacancies are classified as Permanent, Temporary, Contract or Temp/Perm.

For the purposes of matching against candidates or for finding a vacancy that matches a candidate, you should set up a vacancy skill profile.

People

This screen gives a listing of all the people on the system, i.e. an amalgamation of all client contacts and candidates. Selecting a record here will open the appropriate company or candidate record.

Shortlists

A shortlist is one or more candidates selected (primarily) as the result of a search. A shortlist must reference a company and optionally a vacancy. A reference code must be entered and in combination with the client name will be uniquely displayed. Candidates may be progressed through to interview, 2nd interview, offer etc., thereby taking you through the recruitment cycle.

Placements

Placements made are shown here, assuming that the shortlist record has been completed. The default is to the current month, you can change this by using the arrows next to the date fields, or changing the dates fields. This can be done either by typing in the required date, or double clicking on the field and picking the date.

Temporaries

Temporaries processing allows the temps controller to keep track of all the temporary bookings that are live on a particular week. New bookings may be added, along with details of client confirmations, rates etc. The Timesheet Module allows for input of timesheets, and is fully integrated with payroll. (see separate guide).

Activities

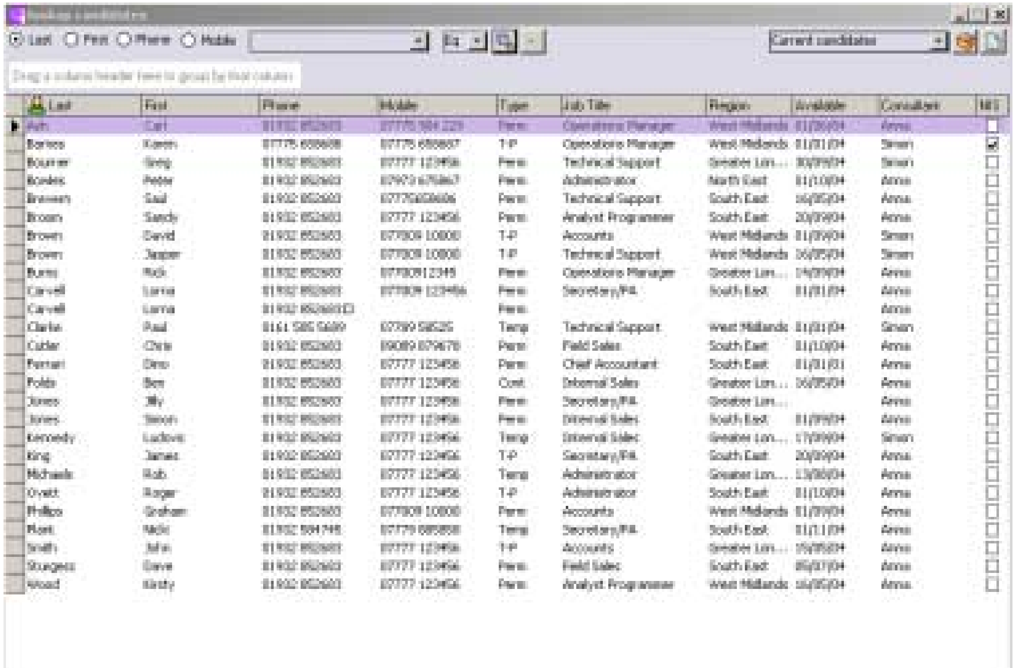
The activities processing screen shows details of activities that have been logged by consultants. An activity is defined as an event that has taken place in relation to a candidate and/or company and/or vacancy. This module links with Microsoft Outlook and allows future tasks/diary appointments to be generated from Purple Square, taking advantage of the power of Outlook.

Mail Centre

The mail centre allows consultants to send one or more emails, mobile phone text messages or word documents to client contacts and candidates. Especially useful for bulk notifications.

Lookup grids

Integral to the basic design of Purple Square are the lookup grids that can be found throughout the system. These grids allow you to locate records easily and to display and group records in many different ways. Take as an example the candidate lookup grid:

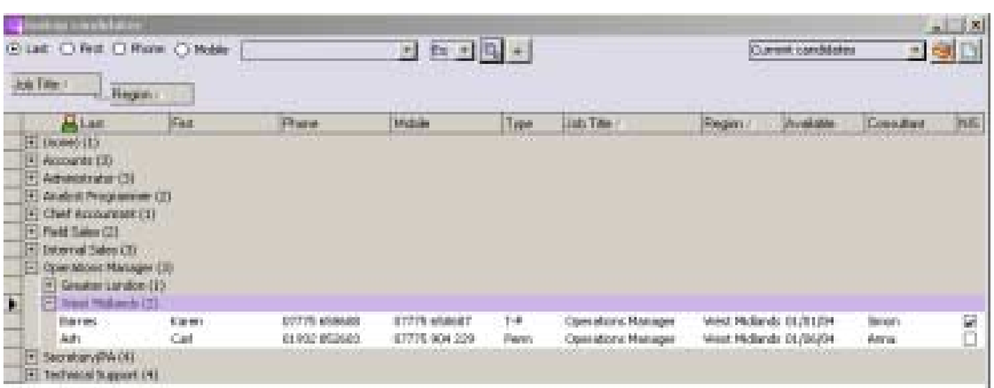


In this case candidates are sorted by default in Last name order. You may:

Sort records in ascending/descending order in any field by clicking on the appropriate heading

Change the column order display by dragging and dropping headings

Group the display into heading categories by simply dragging one (or more) headers to the top of the page. By selecting the -/+ button you can collapse/expand all the records. For example you might want to view all Operations Managers by region. To do this you would drag the Job title, followed by the Region headers to the top of the page. Selecting the – button would collapse the display. In the example below the Operations Managers the West Midlands have been expanded:



You may search for a record (in this case by Last name, First name, Phone and Mobile numbers) by typing the required text into the search field box and clicking the find button. By default the system will find the first match containing the text. Keep clicking the find button to scroll down through the matches. Type in Brown to find Brown, Browning, Stuart-Brown etc.

If you want an exact match change the Cn combo to Eq. When the last match is reached (or if no matches are found) the system will tell you that no search text was found.

Selecting the print button will print the contents of the current grid, as formatted.

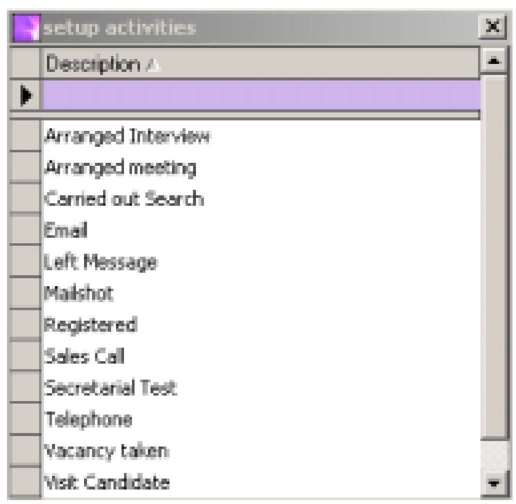
Setup Tables

Before using the system, certain setup tables must be filled out. These allow for consultant names, skill descriptions etc., to be added which can then be applied to your candidates etc.

The "setup" option is accessed from the toolbar on the front screen. All the settings in this section are totally flexible and are used at various points in Purple Square wherever a data entry field allows for a selection to be made from a pull-down combo box.

The Activities table is a typical example of a setup table. The method of entering information is standard throughout the "Setup" module. You may enter as many records as required.

To enter a new activity type simply click the left hand mouse button in the bar underneath "Description" and type. Press enter when completed and the system will ask you if you wish to add the activity. To delete an activity, click on it with the right hand mouse button, the system will ask you to confirm deletion. Records are automatically sorted in alphabetical order.



Deleting / Altering records

Because many of the fields in the system are combo boxes based on these tables if you delete a record which is used on another form (i.e. Candidate record) the related field will be left blank.

For example you have a Consultant named Samantha. Samantha is the Account Manager for one or more companies. If Samantha leaves and is deleted from the Consultants table, all the companis where she was listed as the account manager will show a blank A/C Manager field. It might be preferable in this case to alter Samantha to the new Consultants name, which will be reflected in the linked records.

Alternatively you could delete the consultant, open up the Company and Candidate screens and sort ascending on the A/C Manager and Consultant fields respectively. This would sort the records with those with blank fields first. These could then be assigned new Consultants.

Note: All these setup tables have significant effects on the operation of Purple Square and therefore serious thought should be given to their settings. There is no limit to the number of items included in each table.

Activities

These are defined tasks a consultant carries out in relation to a candidate, client and/or a particular vacancy. Reports can be produced to show actions for the whole company or for individual consultants within a date range.

Business Types

Defines the types of business your clients/prospects are involved in.

Candidate documents

Candidate documents are MS Word template documents that are created and stored in the templates directory for the creation of standard candidate letters. This section of the setup allows for these documents to be listed for Purple Square to use them at various points in the candidate module. An example of use could be a confirmation of interview letter. See below for more detailed information.

Company documents

As for Candidate documents, but relating to clients/contacts.

Company status

You may want to use this to differentiate between, for example, client and prospect.

Candidate Saved Search

This section lists candidate searches that have been saved for later use. An example could be where a client regularly asks for a similar set of search criteria in relation to job vacancies; by having a saved search much time can be saved.

Client Saved Search

Similar to above, except relating to clients.

Consultants

The name of each consultant is entered in this section. This has many uses.

1) Login name and password. Each name entered here becomes a valid login name to access the system. Do not use the same name twice. A password is compulsory. The logged in consultant will be the default name when adding new records where there is a consultant name included on the form.

2) Supervisor and Reports tick boxes. These grant consultants rights to alter setup tables and system options, and to print reports.

3) Notes fields. Candidates, Companies and Vacancies all have general notes fields where large amounts of information can be stored. When entering the notes field the Date, Time and Consultant name are inserted into the field. This name is obtained from the login name used at that computer.

Postal Counties

The software is supplied with a database of all the postal counties in the UK. This can be added to as required.

Postal Towns

The software is supplied with a database of all the postal towns in the UK. This can be added to as required.

Countries

Can be added to as required.

Job Titles

A listing of job titles used by Purple Square at various points within client, candidate and vacancy records. The same listing is used to indicate the current job title of a candidate, and also the job title required. Job titles can also be used in the "searching" features within Purple Square.

Marketing Material

Items added here may be added to client contacts and candidates, and then used to generate mailings from within the mailcentre.

Notice Periods

A list of notice periods that candidates have to give to their existing employer.

Outlook Text

A listing of standard text used by Purple Square when either a task or appointment is created within MS Outlook from Purple Square.

Pay rates

Used within the Timesheet Processing module. Descriptions can be set up for each payrate, ie standard, overtime 1, overtime 2, etc. Tick the box of the pay rate you chose to be the default.

Qualifications

A listing of qualifications held by candidates. Qualifications can also be used in the "searching" features within Purple Square.

Regions

A listing of regions used by Purple Square at within client and candidate records. An example of where a "region" may be used over a "county" is East Anglia, which obviously comprises of more than one county, or as a generalised split in the country, north, south, east, west. Regions can also be used in the "searching" features within Purple Square.

Skills

This important section is used to define the various skills a candidate may have or the skills a client is looking for. These skills are used in the various search functions available within the package, and it is therefore important that serious consideration is given when entering these details.

We would advise not over complicating this area; there is no point in creating too many skills (or duplicating/overlapping) as this can cause confusion and candidates/vacancies/companies will be missed from the search results.

The skill categories are a convenient way of grouping skill codes together and must be set up first.

SMS Text

A listing of standard text used by Purple Square when an SMS text message is sent.

Source

A listing of the different sources a candidate may hear of your agency. A useful method of assessing the effectiveness of different forms of advertising.

System Options

This is where Purple Square is personalised for your agency. Details of SMS connection and default directories are setup here.

Enter password – For Purple Square Limited use only.

To email address – Used for bulk mailings to more than one recipient. All emails where there is more than one recipient are bcc (blind carbon copied) so the other recipients can't see who else is on the email.

Template path – The location of the ms word templates used for standard letters, CVs etc. If on a network this will probably be a shared drive. In the unlikely event that each consultant has his own templates choose a local drive.

Document path – The default location to open word documents.

SMS Text messaging – If you wish to be able to send text messages directly from the system to candidates and contacts you must fill in your account details here. To obtain an account click on the Connection software logo to go to their website www.csoft.com. Details of the accounts available along with the cost options may be found here.

NB. When signing up for an account please enter PurpleSquare into the Special Offer Code.

You will receive a username from csoft. Please enter this followed by @itsarrived.net with no spaces. This is important as the text messages are sent as emails over the Internet. Enter the PIN number as received.

Inactivity timeout – If you enter a number other than zero the program will log you out of the system after x minutes of inactivity. This may be useful in a high street environment.

Travel Times

You enter here the time candidates are prepared to travel for a particular post or the length of time an employer is prepared for an employee to travel for a specific vacancy.

Vacancy classification

This is an indicator of either the type or classification of a particular vacancy. This would normally be used to indicate the type of job, i.e. Accounts, Management, IT etc. It could alternatively be used to show to seniority of the position.

Vacancy status

This indicates at what stage in the interview process a particular vacancy is. An example may be “Frozen” or “Filled”.

MS Word Templates

The system comes as standard with several Microsoft Word templates. Each of these will need to be tailored for each agency. They are as follows:

Int_Clifax.dot – Client site interview confirmation fax

Int_Clilet.dot – Client site interview confirmation letter

Int_Candlet.dot – Candidate interview confirmation letter

Vaclett.dot – Vacancy details confirmation letter

timesheet.dot – Temporary candidate timesheet

Sitelet1.dot – Site contact form letter

Candlet1.dot – Candidate form letter

DrformatCV.dot – Formatted CV.

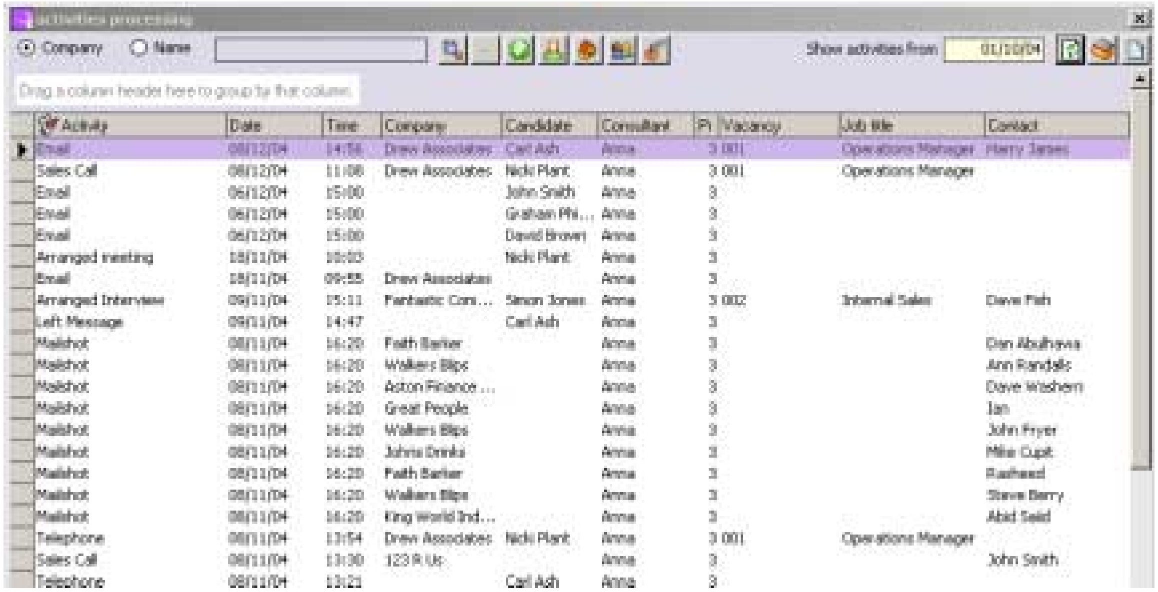
Each of these templates should be held in the Purple Square templates folder as specified in the system options. To edit each template follow this procedure.

4) Open Microsoft Word
5) Choose File, Open
6) Change the Files of type combo to read Document templates
7) Look in the Purple Squaret templates folder (C:\purplesquare or appropriate network drive) and open the appropriate document
8) Insert your logo, standard text; change the layout as desired. Do not delete or amend any of the fields with {} brackets as these are required by the system. Choose File, Save to save any changes made.

2 - THE RECORDS

Activities

Activities are events records. You set them yourself to suit your business, but common examples are: Sales Call, Telephone, Left Message, Email, Sent Company Information, etc. The entries automatically include the name of the consultant, and date and time added.



Add an Activity Record

You can add Activities to any record: Candidate, Client, Contact, Vacancy, or Shortlist entry.

The data grid at the bottom left always defaults to Activity. To add a record, click on the green tick.

Add Outlook Record

From the Activity screen, you can link to Outlook by clicking on the Outlook icon (pick Appointment or Task).

Activities Processing

In Activities Processing, you can review the logged Activities. The lookup grid allows you to sort and group activities as you wish. This is useful for checking on activities, and also for following up on mailshots and sales calls.

Candidates

Add a new Candidate – manual input

Click on add new candidate on start-up screen.
Type information in the fields as available.
Click on Candidate icon in top right hand corner to move to main candidate record.
Add further information as available and required.

Add a new Candidate – automatic input

Click on add new candidate on start-up screen.
Click on the Candidate icon to locate CV. You can open the CV at this stage should you wish to review the original, answering "no" to this question will just import the text to the candidate record.

Select text from the CV to add to record – double clicking on a word selects the whole word, clicking three times select the line. Then click on the arrow at the end of each field to add the information to the record.

Add skills – manual input

Click on green tick next to skills icon and chose skills from list. This is done by clicking on each skill.

You can **grade a skill** from 1 to 5 – it defaults to 3. You can also **add notes** to a skill for a particular candidate.

Add skills – automatic input

Import the CV as for Add New Candidate – automatic input.

Click on the Skills icon. All the skills found in the CV will be highlighted in the skills list – to deselect a skill at this point, click on it once.

When you close the window, or go on to the Main Candidate Record, you will be asked if you want the skills to be added to the candidate record.

Delete skills

From the Candidate Window: right click on skill
From the Add Skills Window – click on skill in the right window, and then click on the blue "remove" arrow.

Link a CV to a candidate

(If you imported the candidate details from a CV, the original will already be linked to the candidate.)

Click on the files tab, and then on the Browse for Documents icon. Locate the CV and double click on the file (or click once and then click on Open). You will be asked:" Do you want to insert the text to the database?" – answer Yes.

Format a CV

On the navigation bar, choose Format CV. On the screen with the CV text, highlight the text to be included on the CV, then right click, and click on Copy. Finally, click on the Word icon. Save and close the document.

Companies

Add a new company

Chose Add new company from the start-up screen, or click on the green arrow on the look-up grid screen.

Input company name and address, then click on the Company icon to go to the main company record.

Add vacancy

Click on the vacancy icon, then click on the green tick.

Add skills to a company

Click on the skills icon, then click on the green tick.

Contacts

Add a new contact

Contacts are added from the company screen by clicking on the green tick next to the Contacts field.

A couple of things to note are:

Salutation – important if you are going to send mailshots, always put in first name or Mr/Mrs and surname.

Telephone number – the number entered for the company is pulled through to this screen, but remember that it will not change if you change the company number.

Vacancies

Add a new vacancy

You can add a vacancy either from the start-up screen, or from the client screen. If you choose to do it from the start-up screen, you need to allocate the vacancy to a client using the pull down menu on the Company field.

Add a skill to a vacancy

To add skills to the vacancy, click on the green tick next to the Skills field. You can add any number of skills to a vacancy, but must select one to five skills as “essential” for searching purposes.

There are two notes fields on the vacancy screen, that can be used for job descriptions etc.

Temporaries

Bookings

This is the actual work record for a temporary placement. If you add a vacancy record for a temporary vacancy, when it is filled you need to create a booking. Alternatively, you can create a booking straight away, either from the start-up screen or the company screen.

Create a booking from the start-up window

Click on Bookings, then on the green tick. Insert company, candidate, vacancy (if one exists), and add all relevant details.

Create a booking from a vacancy record

In the vacancy window, pull down the Navigation Bar and click on Add Temp Booking.

Create a booking from a client record

In the client window, pull down the Navigation Bar and click on Add Temp Booking.

Temp Availability

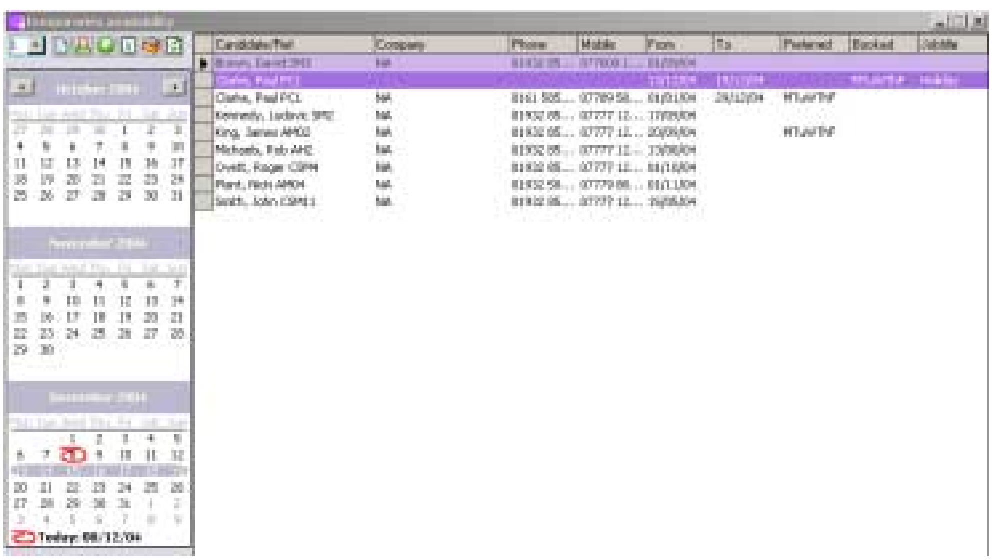
This shows a list of all candidates that are registered for temporary work within the specified period.

When a candidate is assigned to a booking, two records show up for them – the second is in purple, and shows the details of the booking the candidate has been assigned to.

Temp unavailability

This is used when a candidate is on holiday, or off sick, or for any other reason is not available for temporary work for a finite period of time. In the candidate record, choose Temp unavailability from the Navigation bar.

This will show in the Temp Availability window, and on Temp Placements on the candidate record.



3 - THE SEARCHES

Candidates

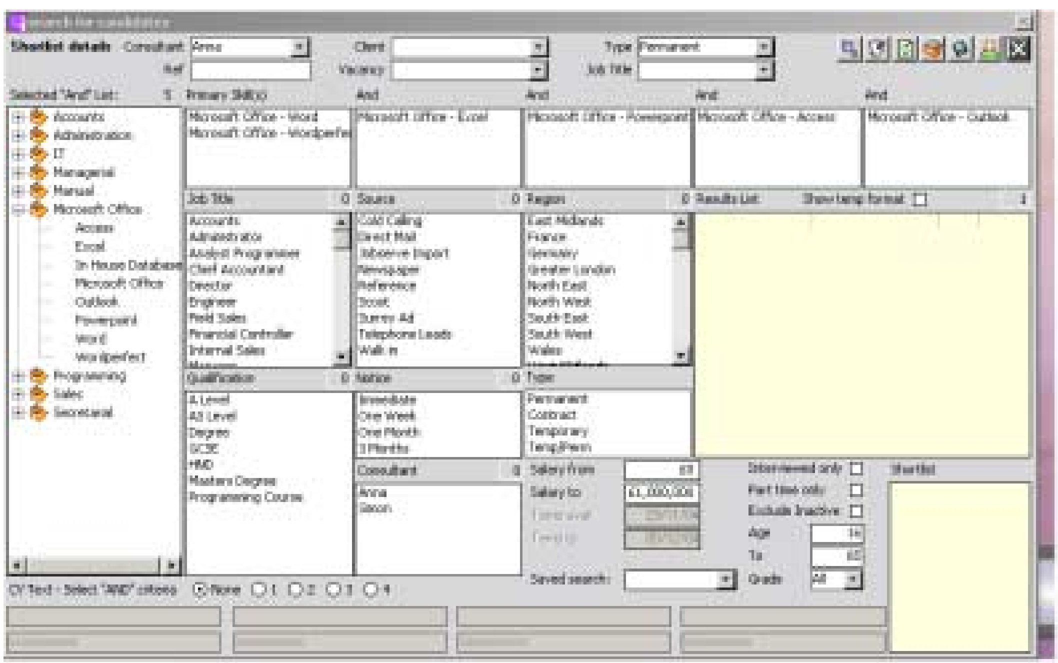
Search for candidates with certain skills

Click on Search under the Candidate heading on the start-up screen. This takes you through to the candidate search window. To search for candidates with certain skills you need to choose skills from the list on the left in the screen. This shows all the skills you have added, grouped in Categories. Click on the + sign to open up the treeview of the skills.

To add a skill to a search column, you click in to the search column, and then click on the chosen skill.

You can search on a combination of up to five skills using an “and” criteria, with unlimited “or” criteria. For example, you can search for candidates with Word AND Excel AND PowerPoint AND Access AND Outlook, by adding one of these skills to each search column.

If you put two skills in the same search column, these are treated as “or” criteria. Ie, if you put Word and WordPerfect in the same column, you will generate a search for all candidates with Word OR WordPerfect.



When you have chosen the skills, click on the search icon. Candidates with the selected skills and/or attributes will show in the results window, where you can double click on the candidate to open up the record.

Search for candidates according to job title, region, source, etc.

In the lower half of the search window, you can chose to search on: Job Title, Source, Region, Qualifications, Notice Period, Type of Work (temp, perm, etc), and Consultant.

To select a job title (or source, region, etc.) simply click on it. To deselect it, right click.

You can also search on age- and salary range by inputting the figures.

By ticking the boxes in the bottom right hand corner, you can restrict the search to those candidates that have been interviewed, or are registered for part time work. You can also exclude Inactive candidates from searches.

Match candidates to a vacancy

From the vacancy screen, pull down the navigation bar and click on Match candidates to vacancy. This opens up the candidate search window, and pulls across any skills that have been ticked as Essential.

Save searches

You can save the search criteria as a “saved search”, which is useful if you look for certain skill set on a regular basis. When you have entered the selected skills, click on the save icon. To retrieve a saved search, use the drop down menu.

Save lists

This allows you to save a result list of candidates from a search, to be used in the mail centre. To save a result list, click on the Candidate icon in the top right hand corner and give it a name. To retrieve it in the Mail Centre, you find the saved lists in the drop down menu in the Saved Lists box.

Search on free text from CVs

You can search on text on any linked CVs. At the bottom right of the candidate search screen, you have the option to click one, two, three or four “and” criteria to be searched on. For example, if you want to search for a candidate with Crystal Report experience, click on One, and then type crystal, or crystal report in the first field. Then click on the search button, and proceed as above.

Companies

Search for companies with certain skills

Click on Search under the Company heading on the start-up screen. This takes you to a search window similar to the candidate window. You can skill companies just as you skill candidates, and the search works in the same way as the candidate search.

Search for companies according to region, source, etc.

In addition to skills, you can search for companies according to Region, Consultant, Source, Sector, and Size.

Vacancies

Search for vacancies with certain skills

Click on Search under the Vacancy heading on the start-up screen. This takes you to a search window similar to the candidate search window. You can skill vacancies just as you skill candidates and companies, and the search works in the same way.

Search for vacancies according to job title, region, etc.

In addition to skills, you can search for vacancies according to Region, Classification, Sector and Job Title.

Shortlist

Introduction

The shortlist is one of the central concepts within Purple Square. It allows you to follow the recruitment process from beginning to end. It gives you information of the status of a vacancy at a glance.

Shortlist records can be accessed from Shortlist Processing, as well as from the candidate, company, and vacancy windows.

Add candidates to a shortlist from a search

To create a shortlist from a search, first you need to enter a reference, company, and job title (no need to enter a vacancy – it can be used for canvassing speculatively).

Click on the candidate you want to add to the shortlist, and then Right click. You will be asked: “add this candidate to the shortlist?” – click Yes. The names added to the shortlist show in the bottom right hand corner of the screen.

Now click on the Shortlist Processing icon. This takes you to the Shortlist look-up grid.

Add candidates to an existing shortlist

To add a candidate to an existing shortlist can either be done from Shortlist Processing or through a new search. In Shortlist Processing, choose Add New Entry from the Navigation bar, and complete the details as required. Or, you can do another search, using the details for the appropriate search and adding more candidates.

The Shortlist look-up grid

This is where you find all the current shortlists. The default is to sort them in reference order, but you can manipulate the grid in the same way as described in the Introduction – Look-up Grids in the first chapter of this guide.

Click on the plus sign for the shortlist you are working on, and you can immediately see from the tick boxes which candidates have been contacted, rejected, CVs sent, interviews arranged, etc.

Contact candidates on shortlist record

You can contact candidates through the shortlist record, by email or SMS text. Highlight the candidates you want to contact, then choose email or SMS from the Navigation bar.

Send candidate CVs to clients

If the candidates' CVs are linked to their records, you can email the client from Shortlist processing. Follow these steps:

- Highlight the candidate.
- Right click – this brings up a window allowing you to tick the CV sent box, and the attachment will appear at the bottom of the window.
- When you have chosen all candidate CVs to be included, you need to pick a contact to email. You pick the contact by using the pull down menu in the contact field at the bottom of the screen.
- Choose Email CVs to Client on the Navigation bar.

Amending shortlist details

When a candidate has been contacted, rejected, CV sent, interviews arranged, etc, you need to amend the shortlist details to reflect this.

You can access the Shortlist details from Shortlist Processing, or from the candidate, company or vacancy record.

To amend a shortlist record from Shortlist Processing, highlight the candidate and double click on the arrow on the left hand bar.

To amend a shortlist record from the Candidate screen, click on the Shortlist icon next to the left data grid. Double click on the required shortlist record.

To amend a shortlist from the Company screen, click on the Shortlist icon next the left data grid. Double click on the required shortlist record.

Schedule interviews and confirm interview details

When you tick the First, Second and Third Interview tick box, the Date and Time of interview becomes accessible for you to put in the correct details.

To confirm the interview details in writing, click on the Word icon next to the Document field at the bottom of the screen, choosing either Candidate or Contact. This brings up the Word template with the interview details completed.

When a candidate is employed

When you tick the Employed tick box, the placement will show up in the Placement window.

“Hide” records from the Shortlist

If you have rejected candidates from a shortlist, and you have a long list, you may want to hide these candidates from the list. To do this, tick the Do not show in Shortlist tick box.

Delete a Shortlist

To delete a Shortlist, highlight it on the look-up grid and choose delete from the Navigation bar.

Access related records from Shortlist Processing

To access related candidate, company and vacancy records from Shortlist processing, highlight the record and click on the appropriate icon.

Add an Activity to a shortlist record

You can add an activity to a shortlist record. This activity will show up against the related candidate, company, and vacancy.,

4 - COMMUNICATION

Mail Centre

The mail centre allows for bulk (or individual) emails, SMS text messages or mail merges to Word. You may carry out the merge for either candidates or site contacts.

Before you start

Emails will be sent to a recipient email address picked by you (usually a general email address at your company) and the candidate/client recipients will be Bcc (Blind Carbon Copy). The recipient address needs to be completed in the Purple Square Set Up, Systems Options, in the To: email address field.

Select Recipients

The default is to the Candidate grid – to change to Companies, use the drop down menu in the Choose Data field.

To select the recipients, click on the records. Pressing the Ctrl key at the same time allows you to highlight multiple records, or you can press the Shift key to select a range of recipients.

Merge to Email

When selection is complete, click on the Email icon.

Merge to Word document

You can either merge the data to an existing or new Word document. To merge to an existing document, choose the option from the drop down menu in the Merge Type field, then click on the Word icon. Browse to the required document. Click on Open, and follow the Microsoft Word mail merge procedure.

To merge to a new document, choose the option form the pull down menu and click on the Word icon.

Merge to SMS Text Message

Select recipients as above, choose Merge Option SMS text, and click on the mobile phone icon.

From the Record Screens

You can send individual letter, emails and text messages directly from the candidate, contact and vacancy screens. To send a letter, choose a template from the Letter Merge and click on the Word icon, to text, click on the mobile phone icon next to the mobile phone number, and to email, click on the mail icon next to the email field.

SMS Text Messaging

To be able to send SMS text messages from Purple Square, you need to set up an account with Connection Software Ltd. Registration for the basic service is free, and each message costs 8.5p if you buy the minimum bundle of 100 (bigger orders are discounted).

All the information is on the website, www.csoft.co.uk.

5 - TECHNICAL INFORMATION

System Requirements

Although the software will run on any PC with Windows 98 or above installed, we would recommend as a minimum a Pentium ll or equivalent running at 500MHz or above with 256MB RAM installed. Any recently purchased pc should easily exceed this specification.

PCs should have Microsoft Office 2000 or above installed to take full advantage of the Word and Outlook links.

Screen Resolutions

Purple Square has been designed to work with an 1024X768 screen resolution. An 800X600 resolution will be messy, as not all the information will fit on the screen without using scroll bars.

Single & Multi User Installation

By default, when installed from CD, the programs and data files are located in the Purple Square folder on your PCs' hard drive. (C:\purplesquare). The main program file is called recruit.mde and the data file is called dbtables.mdb. If the data is moved the program will detect this and ask for the location of the dbtables.mdb file.

In a network situation you will only want one copy of the dbtables.mdb file. We would suggest moving the dbtables.mdb file to the file server. You may place this in any folder; the first time that you run the program it will prompt you for the new location. For subsequent installations on the other workstations you will be prompted for the location of the data.

Backing Up

We would recommend that your data is backed up every working day. If any major deletions/changes are about to take place again we would recommend taking a backup. Only one file is required for your daily backup – dbtables.mdb. For a single user system this will be in the C:\purplesquare folder or for a network installation it will reside on the server – your system administrator should know the location.

To backup the data we would recommend either using the backup routine included as part of Windows or your server based system. You may additionally wish to backup any word templates that are setup – these will reside in the templates folder specified in System options.