

# CalJOBS<sup>SM</sup> Training Module

## Customer Relationship Management (CRM)



Welcome to the Customer Relationship Management (CRM) training module. The CRM feature will assist staff and partners to conduct, manage, and record employer recruitment efforts.

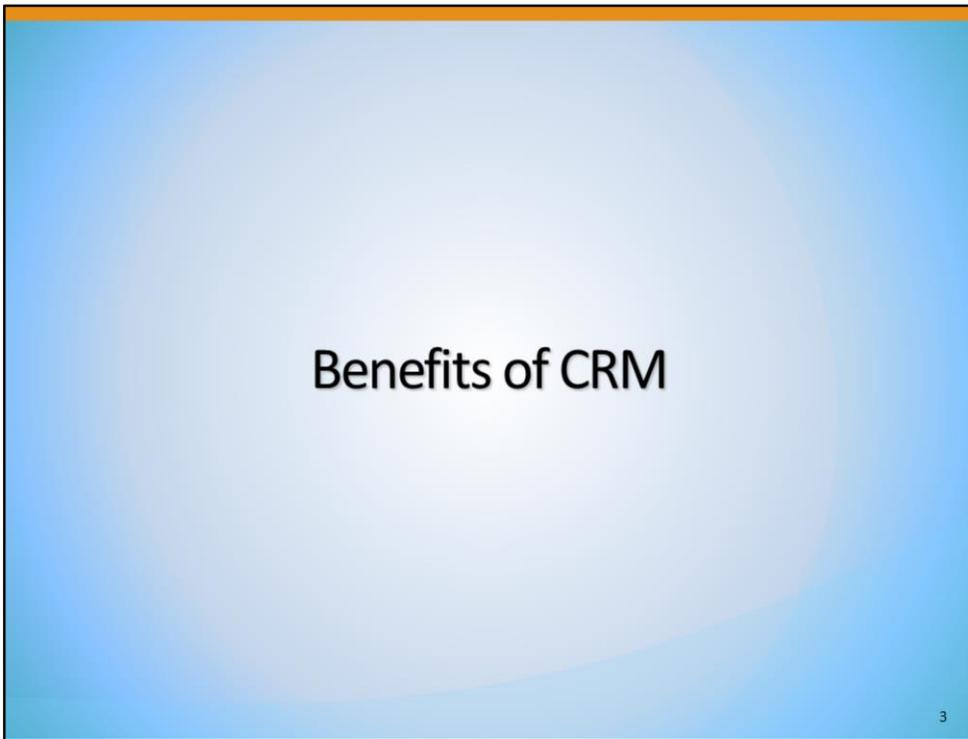
## Objectives

- Identify the benefits of CRM
- Define and create a Marketing Lead
- Review the Contacts List and Marketing Leads List
- Utilize Work Items and enter Employer Activity Codes
- Use Local Employer Sites
- Convert a Marketing Lead
- Identify CRM Reports

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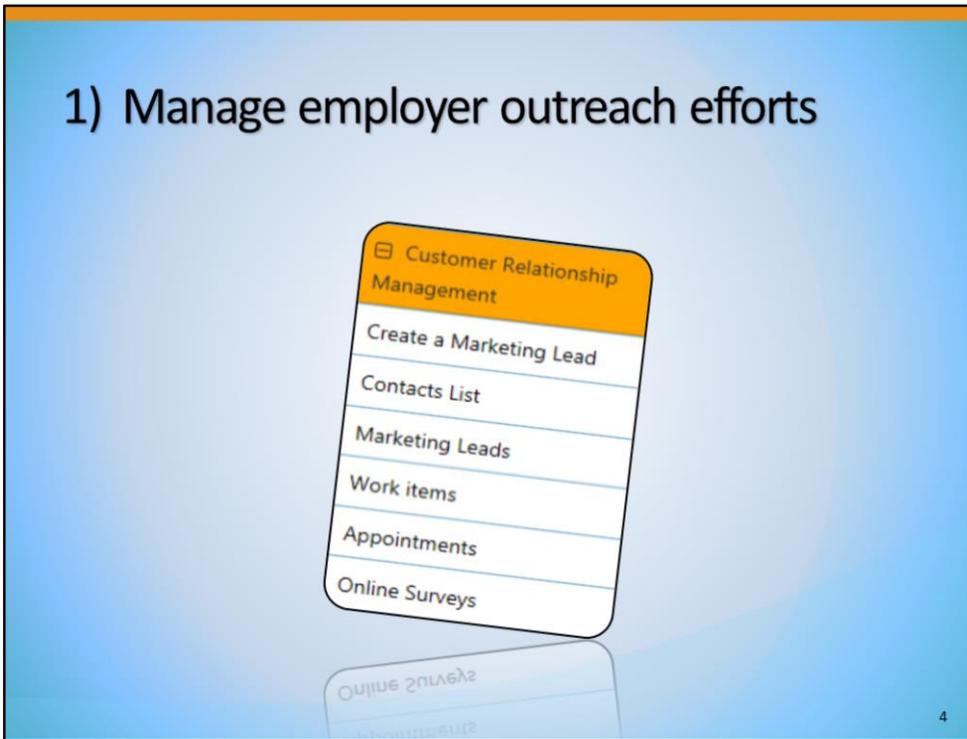
By the end of this training module, we hope that staff will be able to achieve the following objectives:

- Identify the Benefits of CRM
- Define and create a Marketing Lead
- Review the Contacts List and Marketing Leads List
- Utilize Work Items and enter Employer Activity Codes
- Use Local Employer Sites
- Convert a Marketing Lead
- Identify CRM Reports



We will identify four benefits of using the CRM module.

## 1) Manage employer outreach efforts



First, CRM makes it possible for employer outreach staff, business services representatives, and other staff to enter potential business customers into CalJOBS as Marketing Leads for the purpose of providing assistance to these employers and tracking those services provided.

## 2) Identify new marketing leads

External Employers

[Show Filter Criteria](#)

To sort on any column, click a column title.

Company Name	Active Job Orders	Action
AMVAC Chemical Corporation	4	<a href="#">Convert to lead</a>
Bakersfield College	1	<a href="#">Convert to lead</a>
Bay Area Air Quality Management District	2	<a href="#">Convert to lead</a>
Boomers!	1	<a href="#">Convert to lead</a>
Burroughs, Inc.	24	<a href="#">Convert to lead</a>
Christie Digital Systems USA, Inc.	7	<a href="#">Convert to lead</a>
Competitor Group, Inc.	22	<a href="#">Convert to lead</a>
Concentrix Corporation	5	<a href="#">Convert to lead</a>

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Next, CRM allows business services staff to search for untapped employers that are not yet entered into the system and convert them to a Marketing Lead.

### 3) Manage current employer outreach

Contact List

[Show Filter Criteria](#)

A|B|C|D|E|F|G|H|I|J|K|L|M|N|O|P|Q|R|S|T|U|V|W|X|Y|Z

To sort on any column, click a column title.

Contact Name	Company Name	Title	Email	Phone	Action
<a href="#">Antin, Robert L</a> (Primary Contact)	Vca Inc	Ceo		(310) 571-6500	<a href="#">Delete</a>
<a href="#">Flinstone, Fred</a> (Primary Contact)	White Water Rafting Inc.	Owner		(530) 555-6666	<a href="#">Delete</a>
<a href="#">Flowers, Larry</a> (Primary Contact)	Purple Pillows			(619) 789-4563	<a href="#">Delete</a>
<a href="#">Harding, Tanya</a> (Primary Contact)	Tanya's Tarts	Manager		(916) 555-5555	<a href="#">Delete</a>
<a href="#">Johnson, Ina Marie</a> (Primary Contact)	Uti Worldwide Inc	Hr Executive		(562) 552-9400	<a href="#">Delete</a>

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Next, CRM provides a central location where staff can organize and manage their employer outreach work in progress.

## 4) Track staff services

### Work Items

**Work Items**

My Items  Group Items

**My Queue**

You currently have 3 work items in your queue where you are the currently assigned user. You have 3 items that are due today. [View these items.](#)

Show work items where you are the sponsor but not assigned

Work Item ID	Employer	Staff Workgroup	Staff Area of Responsibility	Work Item Category	Priority
2	Tacos El Tapuzito	Customer Relationship Manager	Customer Relationship Management	Face-to-Face Meeting	Low
1028	Sandy's Salines	Customer Relationship Manager	Customer Relationship Management	Phone Call	High

### Employer Activity Codes

**Staff Name:** Kayleigh Davis **Phone:**

**\*Service Type:** None Selected

**Scheduled Date:** None Selected

**Scheduled Time:** E49 - Other (Describe in Notes)  
E01 - Alien Labor Certification  
E02 - Americans With Disabilities  
E03 - Americas Job Bank  
E04 - Apprenticeship  
E05 - Bonding  
E06 - CalJOBS Recruitment  
E07 - Disability Insurance  
E08 - Employer Advisory Council  
E09 - Referred Qualified Applicants  
E10 - Job Fairs

**Actual End Date:** E21 - Job Fairs  
E22 - Job Identification Contact  
E23 - Notification to employer of potential applicant  
E24 - Job Shadowing  
E25 - On the Job Training  
E26 - Older Worker Hiring  
E27 - School to Career Programs  
E28 - Rapid Response-Layoff or Closures

**Completion Code:**

**\*Region:**

**\*Office:**

**Position:**

**Contact Type:**

**Contact Method:**

**Contact Name:**

**Comments:**

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Finally, staff can use Work Items to track and document employer outreach tasks that they complete each day. In addition, services provided to Marketing Leads can be reported in the system, using the employer activity codes. Staff and management can run reports on employer outreach work performed.

## Define and Create a Marketing Lead

## Marketing Lead Defined

### Marketing Lead

- Created to track outreach efforts
- Employer not fully registered in CalJOBS
- Limited CalJOBS access
- Potential to become recruiting employer
- Used in CRM Module

### Recruiting Employer

- Formerly known as “Preferred Employer”
- Created to recruit job seekers
- Fully registered in CalJOBS
- Full CalJOBS access
  - Post job orders
  - Search & view resumes

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Before we cover how to create a Marketing Lead, we will first define a Marketing Lead and compare it to the other type of employer account in CalJOBS, Recruiting Employer (formerly known as “Preferred Employer”).

## Create a Marketing Lead

- 5 ways to create a marketing lead:
  - CRM Widget
  - CRM Left Navigation Menu
  - Create an Employer
  - Local Employer Sites
  - Convert an External Job

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The system offers staff numerous ways to create a Marketing Lead.

# CRM Widget

My Staff Dashboard | My Staff Resources | My Staff Account | Directory of Services

☐ Saved Lists ☒

Individuals Assisted: [Frost, Paige \(PAIGEFROST\)](#), [Olive, Ellie \(ELLIEOLIVE\)](#), [Pumpkin, Green \(GREENPUMPKIN\)](#), [Spice, John \(JOHNSPICE\)](#), [Cucumber, Melon \(MELONCUCUMBER\)](#)

Employers Assisted: [Johnson and Johnson Brothers \(JOHNSONBROTHERS\)](#), [Sally's Sandwiches \(SALLYSSANDWICH\)](#), [Sign Makers of Yuba \(SIGNMAKERS\)](#), [Stratas Foods LLC \(MKT33816\)](#), [White Water Rafting Inc. \(MKT32291\)](#)

Filter your lists by type:

List Title	Create Date
------------	-------------

☐ Customer Relationship Management (CRM) ☒

-  [Marketing Leads](#)  
Access a list of organizations that are potential customers.
-  [Contact List](#)  
Access a comprehensive list of all your contacts, leads and accounts.
-  [Work Items](#)  
Manage your tasks and assignments.
-  [Appointments](#)  
Schedule appointments and manage your calendar.

☐ My Calendar

October		
S	M	T
24	25	26
1	2	3
8	9	10
15	16	17
22	23	24
29	30	31

[New Appointment](#)

[Upcoming Events](#)

[Enter the Appointment](#)

# CRM Left Navigation Menu

 Customer Relationship Management

Create a Marketing Lead

Contacts List

Marketing Leads

Work items

Appointments

Online Surveys

 Reports

(GREENPUMPKIN), [Spice, John \(JOHNSPICE\)](#), [Cucumber, Melon \(MELONCUCUMBER\)](#)  
Employers Assisted: [Johnson and Johnson Brothers \(JOHNSONBROTHERS\)](#), [Sally's Sandwiches \(SALLYSSANDWICH\)](#), [Sign Makers of Yuba \(SIGNMAKERS\)](#), [Stratas Foods LLC \(MKT33816\)](#), [White Water Rafting Inc. \(MKT32291\)](#)

Filter your lists by type:

List Title	Create Date
<a href="#">People</a>	11/17/2016
<a href="#">Mass Message Test</a>	12/9/2016
<a href="#">Users without WP - Event: 4010 on 10/5/2017</a>	10/5/2017

# Create an Employer

Services for Workforce Staff	4 Correspondence
Manage Individuals	Enter the Correspondence
Manage Employers	Create an Employer
Manage Résumés	Assist an Employer
Manage Job Orders	Employer Access Rights
Manage Labor Exchange	Employer Posting Jobs

Please specify the functionality that you wish to access.



## Recruiting Services

Perform labor exchange functions such as recruiting talent, posting jobs, online résumé search, applicant tracking and researching the local labor market.



## Marketing Lead

Create a Marketing Lead account for an organization that you wish to track for purposes of outreach and Customer Relationship Management (CRM)

# Local Employer Sites

Services for Workforce Staff

- Manage Individuals
- Manage Employers**
- Manage Résumés
- Manage Job Orders
- Manage Labor Exchange
- Manage Activities
- Manage Scan Card
- Manage Providers

4 Correspondent

Quick Employer Search | Advanced Employer Search

Area (click to change): NoRTEC Consortium

Search Criteria

Type your keywords in the box and click the Search button. (e.g. Microsoft or computer)

Keyword Search Options: Home Health Care Management

Show Additional Search Options

### Home Health Care Management

1647 Hartnell Ave # 11  
Redding, CA 96002-2360  
[Map Address](#)  
[HOMEANDHEALTHCAREMANAGEMENT.COM](http://HOMEANDHEALTHCAREMANAGEMENT.COM)

[ Convert to lead ]

Employer information is provided by Infogroup®, Omaha, NE, 800/555-5211. Copyright © 2018 Edition 1. All Rights Reserved.



# Convert an External Job

The screenshot displays a web application interface for job management. On the left, a sidebar menu under 'Services for Workforce Staff' includes options like 'Manage Individuals', 'Manage Employers', and 'Manage Job Orders'. The 'Search for all Jobs' option is circled in pink. The main content area shows a search results page with a 'Job Summary' for 'Machinist/Welder'. The job details include 'Job #: 19923', 'Redding, CA - 96049', and 'Posted 9/25/2017 - www.petersonca.com'. At the bottom of the job summary, the 'Convert to lead' button is circled in pink. Other buttons include 'Send via a Message' and 'Enter candidate(s) to this Job'. The page number '15' is visible in the bottom right corner.

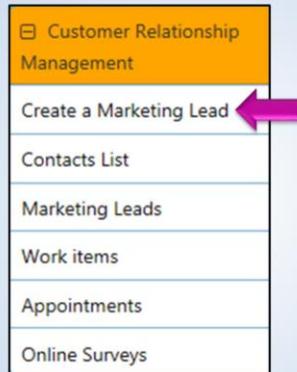
# Create a Marketing Lead

The screenshot displays the CalJOBS staff workspace interface. At the top, there is a navigation bar with links for Home, My Dashboard, Sign Out, Services for Individuals, and Services for Employers. Below this is a welcome message for 'lyndsey richmond' and a brief instruction about customizing content. The main area is divided into several sections: a left-hand navigation menu, a central content area, and a right-hand calendar. The left-hand menu includes options like 'My Staff Dashboard', 'My Staff Resources', 'My Staff Account', 'Directory of Services', 'Customer Relationship Management', 'Create a Marketing Lead', 'Contacts List', 'Marketing Leads', 'Work items', 'Appointments', and 'Online Surveys'. The 'Customer Relationship Management' menu item is highlighted with a purple arrow. The central content area shows 'My Correspondence' with '2 Letters' and '4 Correspondence Templates', and a 'Customer Relationship Management (CRM)' widget outlined in a purple box. This widget contains sub-sections for 'Marketing Leads', 'Contact List', 'Work Items', and 'Appointments'. The right-hand side features a 'My Calendar' for May 2017, showing a grid of dates and a 'New Appointments' section.

Let's take a look at how to get started with the CRM module. To access the CRM module, log in to CalJOBS with a staff account. You'll find the CRM menu about halfway down on the left. In the example shown here, the CRM menu has been moved up to the top, for convenience.

In addition, you can access the CRM module via the CRM dashboard widget, outlined in the purple box.

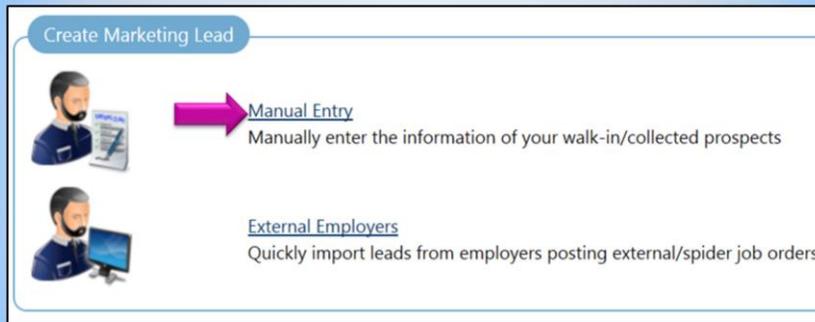
## Create a Marketing Lead



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We'll begin by opening the first sub-menu of the CRM menu, **Create a Marketing Lead**. Ideally, a marketing lead should be created as soon as a staff member has made contact with an employer or business customer.

# Manual Entry – Step 1



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After selecting **Create a Marketing Lead** from the left menu, we can choose from the two methods shown here:

- Manually enter the information of an employer you're working with, or plan to work with, or,
- Select from a list of external employers -- those employers whose jobs are gathered and "spidered" into CalJOBS by the system.

First, let's select Manual Entry.

## Step 2

Employer Identification

Employment Development

Department (EDD) Account #:  Do not enter dashes. 8 digit account # example 11122223

Confirm EDD Account #:

Cancel Continue

EDD Account # is the UI Tax ID for the Employer. This information is not required for a Marketing Lead. Select "Continue" to proceed.

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Which brings us to the **Employer Identification** screen.

The EDD Account Number, also known as the employer tax ID #, are not required fields for marketing lead employers. You may enter the EDD Account Number if you have it, or just select the "Continue" button.

## Step 3

\* Indicates required fields.

**Staff Info**

\* LWIA / Region:

\* Office Location:

**Employer Identification**

\* Company Name:

Short Name:

Employment Development Department (EDD) Account #: 96526851

**Primary Location Information**

\* Zip code:  [Find Zip Code](#)

99999 or 99999-9999

Enter contact information for Marketing Lead, fill required fields. Select "Save" when complete.

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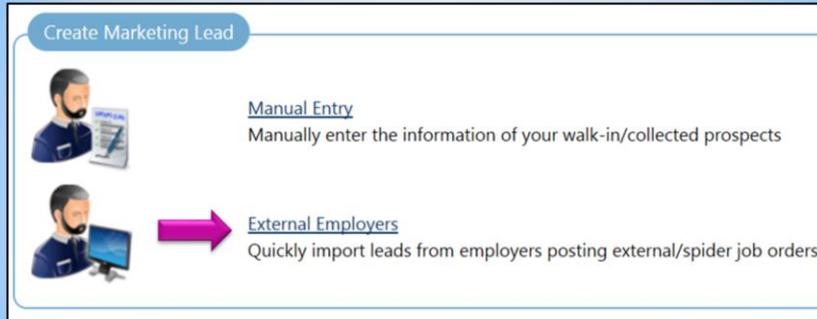
The next page is used to create the marketing lead. Select the appropriate **LWIA/Region** and **Office location** in the **Staff Info** section.

Next, in the **Employer Identification** section, enter the **Company Name**.

If you know the zip code of the employer's main, or primary, location, enter the **Zip code** first. Then you will be prompted to enter the Street Address. Continue by completing the **Mailing Address** and **Contact Information** sections not shown on this slide.

Select "Save" when complete.

# External Employers – Step 1



Select External Employers link to view list of Employers with spidered job orders.

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Now let's go back and create a marketing lead for an External Employer, or, any employer whose job postings have been "spidered" into CalJOBS.

Again, on the CRM menu we select **Create a Marketing Lead**. Then, select the External Employers link.

## Step 2- Filter List

External Employers

[+ Show Filter Criteria](#)

**Filter Criteria**

Keyword :     Starts With  Contains

NAICS Code :

Zip Code :

[ [Filter](#) | [Reset Filters](#) ]

To sort on any column, click a column title.

Company Name	Active Job Orders	Action
AMVAC Chemical Corporation	4	<a href="#">Convert to lead</a>
Anaheim Regional Medical Center	1	<a href="#">Convert to lead</a>
Bay Area Air Quality Management District	1	<a href="#">Convert to lead</a>
Boomers!	1	<a href="#">Convert to lead</a>

Select the Convert to lead link for the Company you would like to convert to a Marketing Lead

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Here you will see a list of all the spidered employers currently in CalJOBS. This list can be sorted by Company Name, or by Active Job Orders. Or, we can expand the Show Filter Criteria link and filter the search.

You can filter by keyword, by industry code, or zip code of the employer location. After we've chosen or identified an employer that we plan to contact, from the right hand side, under the Action column, select the Convert to lead link.

## Step 3

The screenshot shows a web form with the following fields and values:

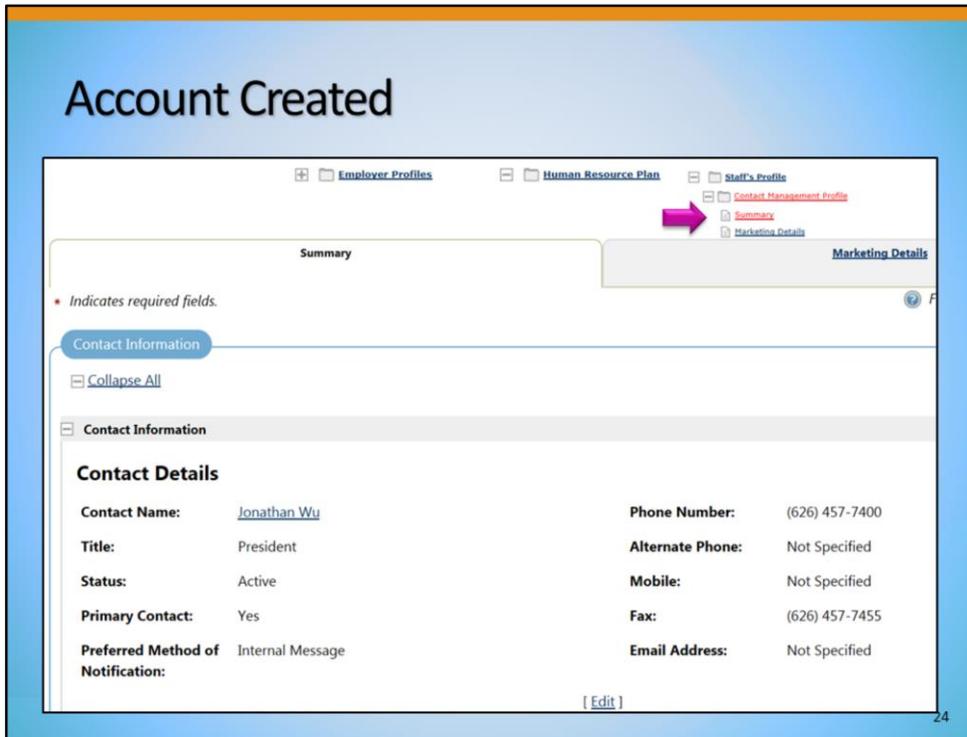
- Office Location:** None Selected (dropdown menu)
- Employer Identification:**
  - Company Name:** Ahmc Healthcare Inc
  - Short Name:** (empty text box)
  - Employment Development Department (EDD) Account #:** (empty text box)
- Primary Location Information:**
  - Street Address 1:** 1000 S Fremont Ave # 6
  - Street Address 2:** (empty text box)
  - City:** Alhambra
  - State:** California (dropdown menu)
  - County:** Los Angeles County (dropdown menu)
  - Country:** United States (dropdown menu)

CalJOBS fills most of the required fields based on the spidered job order information. Verify fields and select “Save”.

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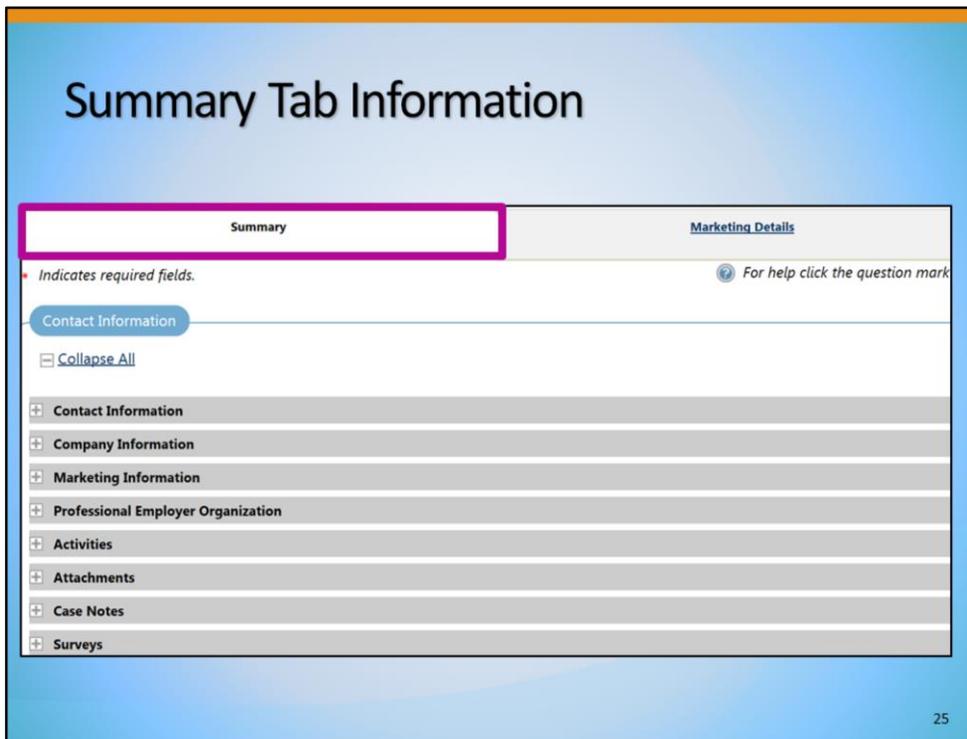
The next screen you will see is the same information entry screen that we saw when completing a Manual Entry. However, this time, most fields will be pre-filled with the profile information that the system has retrieved.

When the required fields are completed, select the “Save” button.



After selecting "Save", the external employer Marketing Lead is created.

The system will automatically route you to the **Staff's Profile** folder, **Contact Management Profile** subfolder, Summary section.



The Summary tab contains the following sections that are useful in the management of the Marketing Lead:

**Contact Information**- Edit login information

**Company Information**- Add Locations and Contacts, View Account Type

**Marketing Information**- View Marketing Lead Owner (The staff person who currently manages the employer's needs)

**Professional Employer Organization**- Select a Professional Employer Organization to associate to the Lead

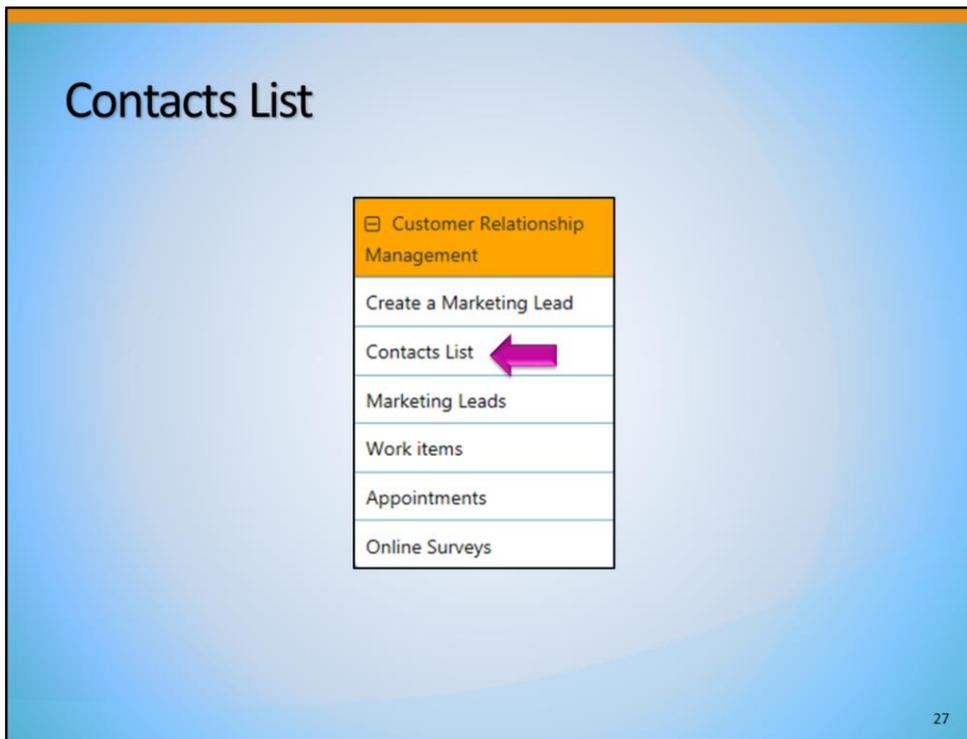
**Activities**- View and add Work Items for the Lead

**Attachments**- Upload and associate important documents, for example, business license, with the account profile

**Case Notes**- View existing and add new case notes

**Surveys**- Not used by California

## Contacts List and Marketing Leads List



Next, we will review the Contacts List within CRM. Navigating to the left menu for CRM, select the second sub-menu: **Contacts List**.

The **Contact List** displays all primary and secondary contacts for a Marketing Lead.

# Contacts List

**Contact List**

[Hide Filter Criteria](#)

**Filter Criteria**

Lead Source:

Lead Owner:

Keyword:   Starts With  Contains  Greater than

Account Type:  Marketing Lead  Recruiting

Lwia:

Office:

[Filter](#) | [Reset Filter\(s\)](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

To sort on any column, click a column title.

Contact Name	Company Name	Title	Email	Phone	Action
Thomas, Liz <small>(Primary Contact)</small>	Enterprise Rent-A-Car	Owner		(530) 555-5555	<a href="#">Delete</a>
Unknown, Unknown <small>(Primary Contact)</small>	Mei's Diner			(530) 555-5555	<a href="#">Delete</a>

Page 1 of 1

Rows

The **Contact List** will default to your name in the **Lead Owner** filter. With this filter applied, this is a directory of contact names and company names of marketing lead employers that you created. In addition, employers that you created as marketing leads, but later converted to a Recruiting Employer will appear on this list as well.

This directory is very useful when you are creating additional marketing leads, because it can be used to search for possible duplicate contacts. It's important to avoid creating duplicate marketing leads or contacts. If you reset the **Lead Owner** field to "All", this list will show *all* Marketing Leads and Recruiting Employers that were originally created as Marketing Leads by other CRM staff.

This means that Marketing Leads created by CRM staff are accessible and available to *all* CalJOBS staff who use the CRM module.

# Marketing Leads

☰ Customer Relationship Management
Create a Marketing Lead
Contacts List
Marketing Leads ←
Work items
Appointments
Online Surveys

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Back to the main menu for CRM, we'll look at the third sub-menu: **Marketing Leads**.

# Marketing Leads

Contact List

[Hide Filter Criteria](#)

**Filter Criteria**

Lead Source: All

Lead Owner: Richmond, Lyndsey

Keyword: Last name   Starts With  Contains  Greater than

Account Type:  Marketing Lead  Recruiting

Lwia: None Selected

Office: None Selected

[ Filter | Reset Filter(s) ]

To sort on any column, click a column title.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Contact Name	Company Name	Title	Email	Phone	Action
<a href="#">Unknown, Unknown</a> (Primary Contact)	Mel's Diner			(530) 555-5555	<a href="#">Delete</a>

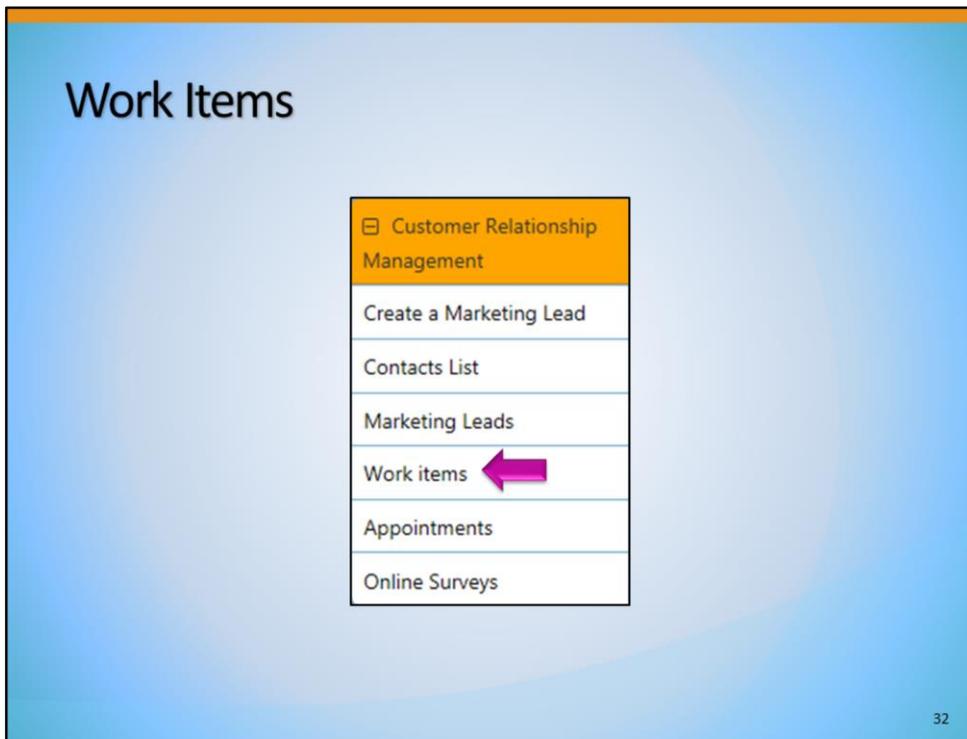
Page 1 of 1 Rows

Selecting Marketing Leads will filter the Contact List to only Marketing Leads you created.

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The **Marketing Leads** list is identical to the **Contact List** screen. The slight difference is that the Marketing Leads list defaults to having the “Marketing Lead” box checked in the **Account Type** filter. Because of this, the list defaults to only the Marketing Lead account types that you have created.

# CRM Work Items



The next sub-menu is **Work Items**. A work item is a task that staff must perform on behalf of a Marketing Lead employer. Work items can be assigned, and re-assigned, to staff and can be prioritized based on importance.

Staff can use work items as a “to-do” list to organize and manage all of their their employer outreach activities. When used in this way, it also provides a record of their daily and weekly work activities for managers to view, as needed.

# The Queue

**My Queue** 

You currently have 3 work items in your queue where you are the currently assigned user.

Show work items where you are the sponsor but not necessarily currently assigned

Work Item ID	Employer	Staff Workgroup	Staff Area of Responsibility	Work Item Category	Priority	Status	Due Date	Action
Z	Tacos El Taquito	Customer Relationship Manager	Customer Relationship Management	Face-to-Face Meeting	Low	Pending	5/20/2017	<a href="#">Edit</a> <a href="#">Delete</a>
1018	Sandy's Saltines	Customer Relationship Manager	Customer Relationship Management	Phone Call	High	New	5/20/2017	<a href="#">Edit</a> <a href="#">Delete</a>
1074	Tanya's Tarts	Customer Relationship Manager	Customer Relationship Management	Phone Call	Low	New	5/11/2017	<a href="#">Edit</a> <a href="#">Delete</a>

Page 1 of 1 Rows 10

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**Group Queue** 

Show Filter Criteria (Showing all Customer Relationship Management Staff Area of Responsibility work items assigned to the Customer Relationship Manager staff work group.)

These are the work items assigned to the staff work group Customer Relationship Manager. Click the item to view the details of that work item. To change the filter criteria, click Show Filter Criteria.

Work Item ID	Employer	Staff Workgroup	Staff Area of Responsibility	Work Item Category	Priority	Status	Due Date	Assigned to	Action
5	N/A	Customer Relationship Manager	Customer Relationship Management	Phone Call	High	New	4/15/2016	Staff04, Ncc	<a href="#">Edit</a> <a href="#">Delete</a>

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The **My Queue** section on top shows the work items assigned to you,, if any.

The **Group Queue** section shows all the work items assigned to the entire CRM work group. There is only one CRM work group in CalJOBS. Everyone who is using the Work Items feature is in the same group.

# Add Work Item – Step 1

Group Queue

Show Filter Criteria (Showing all Customer Relationship Management Staff Area of Responsibility work items assigned to the Customer Relationship Manager sta

These are the work items assigned to the staff work group Customer Relationship Manager. Click the item to view the details of that work item. To change the filter

Work Item ID	Employer	Staff Workgroup	Staff Area of Responsibility	Work Item Category	Priority	Status
5	N/A	Customer Relationship Manager	Customer Relationship Management	Phone Call	High	New
7	Tacos El Taquito	Customer Relationship Manager	Customer Relationship Management	Face-to-Face Meeting	Low	Pending
10	N/A	Customer Relationship Manager	Customer Relationship Management	Phone Call	High	New
13	N/A	Customer Relationship Manager	Customer Relationship Management	Phone Call	Medium	New
1015	California Community Colleges	Customer Relationship Manager	Customer Relationship Management	Face-to-Face Meeting	Low	New

Page 1 of 9 Rows 5

[ [Add Work Item](#) ] [ [Search Work Items](#) ] [ [Work Items Summary](#) ]

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Below the Queues, there are three links. CalJOBS uses Add Work Item and Search Work Items. The third one is not applicable to California. Let's click on Add Work Item.

## Step 2

**Create a Work Item**

- \* Staff Workgroup: Customer Relationship Manager
- \* Area of Responsibility: Customer Relationship Management
- \* Work Item Category:  (dropdown menu open showing: Phone Call, Site Visit, Face-to-Face Meeting, Webinar/Demo, Research, Email, Mail)
- \* Currently Assigned to:
- \* Status:
- Create Date:
- \* Due Date:  (calendar icon)
- Priority:  (dropdown menu)
- \* Description:
- \* CRM Contact:  [Link to a CRM contact](#)

Enter Work Item Category, Due Date & Description.

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On this screen, staff with appropriate privileges can add a new work item for themselves, or assign a work item to another staff. First, select the **Work Item Category** from the drop-down.

The **Currently Assigned To** dropdown will only show names of those staff who have been designated as part of the CRM staff workgroup. Contact your MIS Administrator or CalJOBS SPOC if your name does not appear on this list.

Next, complete the **Status**, **Due Date**, **Priority**, and **Description** fields. Finally, click on the [Link to a CRM contact](#) link shown at the bottom to link a Marketing Lead to the work item.

## Step 3

**Create a Work item**

\* Staff Workgroup: Customer Relationship Manager

\* Area of Responsibility: Customer Relationship Management

\* Work Item Category:

\* Currently Assigned to:

\* Status:

Create Date:

\* Due Date:

Priority:

\* Description:

\* CRM Contact:  [Link to a CRM contact](#)

**Search for CRM Contact**

At least one of the following entries is required, otherwise your whole contact list will be displayed.

\* First Name:

\* Last Name:

\* Company:  Starts With  Contains

After selecting [Link to a CRM contact](#), use the simple search screen to link to the appropriate employer for this work item. This link ensures that the Work Item will be included in CRM Reports.

Finally, select the “Add” button to finish creating the Work Item. After selecting “Add”, you will be directed to the Activities section of the Leads Summary tab, where your work item now populate.

# Manage Work Items – Step 1

The screenshot displays the CalJOBS My Staff Workspace for user 'lyndsey richmond'. The interface includes a navigation menu on the left with categories like 'Customer Relationship Management', 'Marketing Leads', 'Work items', and 'Services for Workforce Staff'. The 'Work items' menu item is highlighted with a pink arrow. The main dashboard area contains several widgets: 'My Correspondence' (2 Letters, 4 Correspondence Templates), 'My Messages' (0 Unread Messages, 1 Read Messages), and 'My Calendar' (May 2017). A 'My Queue' widget is circled in red, containing a notification: 'You currently have 2 work items in your queue where you are the currently assigned user. You have 1 item that is due today or overdue. Sort by Due Date to view this item.' Below this is a table of work items:

Work Item ID	Employer	Staff Workgroup	Staff Area of Responsibility	Work Item Category	Priority	Status	Due Date	Action
<a href="#">184</a>	Diamond Window Cleaners	Customer Relationship Manager	Customer Relationship Management	Phone Call	High	New	10/28/2017	<a href="#">Edit</a> <a href="#">Delete</a>
<a href="#">185</a>	Pet Town	Customer Relationship Manager	Customer Relationship Management	Face-to-Face Meeting	High	New	<b>10/27/2017</b>	<a href="#">Edit</a> <a href="#">Delete</a>

Now that we reviewed how to add a Work Item, let's address how to manage a Work Item.

When you login to CalJOBS, a message notification may pop up and show any Work Items that were created with a due date of today. To open the Work Item from the pop-up notification, simply click on the underlined number link.

In addition, when staff log in, they will see the Work Items queue widget at the bottom of the staff dashboard. Finally, staff can also access their Work Items by using the CRM menu. We will access Work Items using the CRM menu.

## Step 2

**My Queue**

You currently have 2 work items in your queue where you are the currently assigned user. You have 1 item that is due today or overdue. Sort by Due Date to view this item.

[Show Filter](#)

Work Item ID	Employer	Staff Workgroup	Staff Area of Responsibility	Work Item Category	Priority	Status	Due Date	Action
<a href="#">184</a>	Diamond Window Cleaners	Customer Relationship Manager	Customer Relationship Management	Phone Call	High	New	10/28/2017	<a href="#">Edit</a> <a href="#">Delete</a>
<a href="#">185</a>	Pet Town	Customer Relationship Manager	Customer Relationship Management	Face-to-Face Meeting	High	New	<b>10/27/2017</b>	<a href="#">Edit</a> <a href="#">Delete</a>

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To select a work item and it's details from the queue, simply click on the Work Item ID in the first column. Or, you can edit or delete the work item from this screen in the far right "Action" column.

## Step 3

The screenshot shows a web form titled "Edit Work Item 185". The form contains the following fields and options:

- Staff Workgroup: Customer Relationship Manager
- Area of Responsibility: Customer Relationship Management
- Work Item Category: Face-to-Face Meeting
- Work Item Sponsor: Richmond, Lyndsey [ [Edit](#) ]
- \* Currently Assigned to: Richmond, Lyndsey [ [Assign to a different staff member](#) ]
- \* Status: Closed [ [None Selected](#), [New](#), [On Hold](#), [In Progress](#), [Closed](#), [Review](#), [Pending](#) ]
- Create Date: 10/27/2017 09:34 AM
- \* Due Date: 10/27/2017 [ [Today](#) ]
- \* Completion Date: 10/27/2017 [ [Today](#) ]
- Priority: High
- Employer Name: Pet Town
- \* CRM Contact: [Snow, Jon](#) [ [Change Contact](#) ]

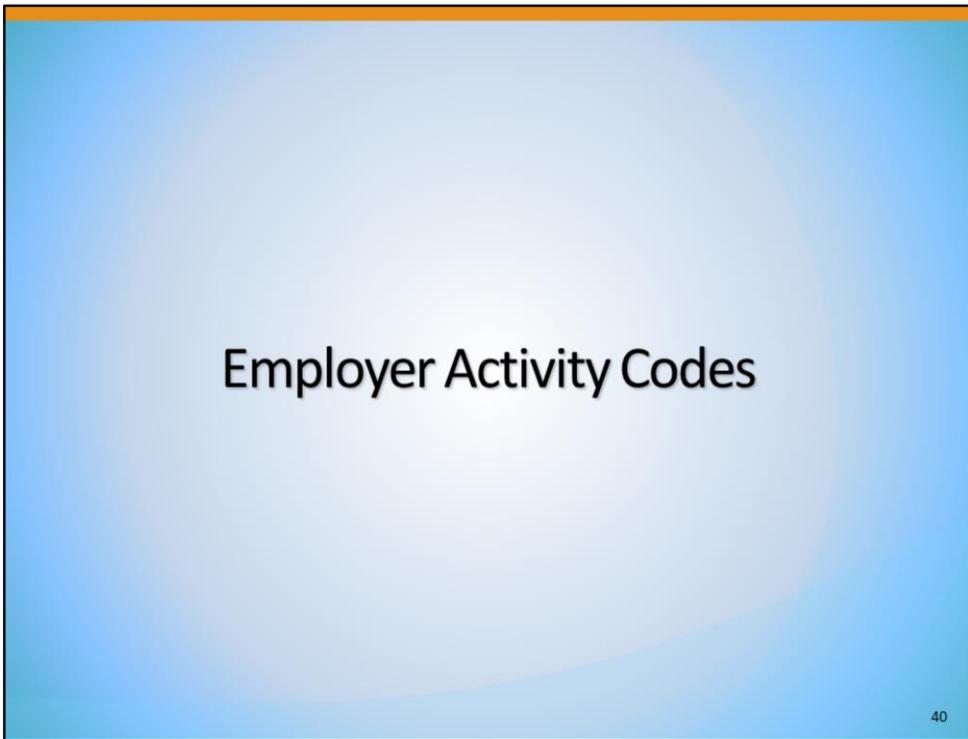
At the bottom right of the form are two orange buttons: "Save" and "Cancel".

Create Date	Note
10/27/2017 Lyndsey Richmond	Meet for job fair.

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On their own work items, staff can change the status from New to In Progress or Closed, and add Notes at the bottom.

Select the "Save" button when you are done working on the Work Item. If you closed the Work Item, it will be removed from your Queue.



It is important that staff enter Employer Activity Codes (E-Codes) to track all services they provide to Marketing Leads. Staff can refer to **WSIN17-09, Attachment 2** for guidance and definitions for each E-Code.

# Employer Activity Codes

Case Management Profile > Activities > Service Plan

Step 1, select  
'Activities'



Step 2, select 'Service Plan'



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To add an activity for a service provided, while Currently Managing the Employer, under the **Employer Profile**, find the **Staff's Profile** folder, **Case Management Profile** subfolder, select the Activities link.  
While in the **Activities** tab, select the Service Plan link.

# Employer Services – Activity Codes

## Step 3 – Add Service

Employer Services

**Company Name:** White Water Rafting Inc.

**Address:** 999 Mountain Ln.  
Redding, CA 96001

 [ [Add Service](#) [Add Multiple Services](#) ]

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If applicable, here is where the existing activity codes will be listed for this employer. In our example, no services have been added.

To add a single service, select the [Add Service](#) link. To add multiple services, select the [Add Multiple Services](#) link. Here, we will add a single service.

# Employer Services – Activity Codes

## Step 4 – Complete Data Entry for Service Activity Code and Save

Staff Name:	lyndsey richmond	Phone:									
*Service Type:	None Selected										
Scheduled Date:	<input type="text"/> <small>MM/DD/YYYY Format</small>										
Scheduled Time:	<input type="text"/> : <input type="text"/>	AM	<input type="text"/>								
Actual End Date:	<input type="text"/> <small>MM/DD/YYYY Format</small>										
Completion Code:	None Selected										
*Region:	None Selected										
*Office:	80000 Miscellaneous EDD Staff										
Position:	Staff										
Contact Type:	None Selected										
Contact Method:	None Selected										
Contact Name:	None Selected										
Comments:	<input type="text"/>										
	<a href="#">Add a new Case Note</a>   <a href="#">Show Filter Criteria</a>										
Case Notes:	<table border="1"><thead><tr><th>ID</th><th>Create Date</th><th>Subject</th><th>Actions</th></tr></thead><tbody><tr><td colspan="4">No data found.</td></tr></tbody></table>			ID	Create Date	Subject	Actions	No data found.			
ID	Create Date	Subject	Actions								
No data found.											
	<input type="button" value="Save"/>		<input type="button" value="Cancel"/>								

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In the next screen, select the appropriate activity code in the **Service Type** drop-down field. Complete the remaining required fields and any optional fields as desired. If you enter a **Completion Code**, be sure to enter an **Actual End Date**.

Once complete, select the “Save” button.

# Local Employer Sites

# Finding a potential Marketing Lead

Manage Employers > Local Employer Sites > Advanced Employer Search

Quick Employer Search      Advanced Employer Search      Employer Search by Occupation

Area (click to change): California

**Search Criteria**

Type your keywords in the box and click the Search button. (e.g. Microsoft or computer)

Keyword Search Options

Industry Title : All Industries  
[ Select Specific Industry ]

Employer Size Range : From: 1 To: All including unknown Employees

Employer Sales Volume \$ : From: 1 To: All including unknown

Location Types : All Location Types  
Single location firm  
Headquarters/home office

Sector Entities : All Sector Entities  
Unknown  
Federal

Does employer have a web address listed?  Yes  No  Either

Search

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One resource to find potential Marketing Leads is the use of the **Local Employer Sites** feature.

The Local Employer Sites menu option opens the Employer Search screen. Staff can use any of the Employer Search tabs (Quick Search, Advanced Search or Search by Occupation) to find detailed information about employers, regardless of whether the employers have current job openings. The system will search for employers listed in the InfoGroup® database that are located within the selected geographic area.

After staff enter the desired search criteria, select the “Search” button.

# Local Employer Sites

**CalJOBS**™ Here are the 92 employers selected in California. Click a company's name in the list below to see details about that company, including a map of its location (if available).

Search

Show Display Options

Company Name	Partial Address	City	State	Key Match	Select
Inns of California	De La Torre St	Salinas	CA	5	<input type="checkbox"/>
Adobe Inn-Carmel	Dolores St & 8th Ave	Carmel	CA	5	<input type="checkbox"/>
Green Lantern Inn	Casanova St & 7th Ave	Carmel	CA	5	<input type="checkbox"/>
Carmel Village Inn	Ocean & Junipero Ave	Carmel	CA	5	<input type="checkbox"/>
Merritt House Inn	Pacific St	Monterey	CA	5	<input type="checkbox"/>
Bridgett Dolans	Hwy 1	Elk	CA	5	<input type="checkbox"/>

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After selecting the “Search” button, staff will be routed to the list of employers that match their selected search criteria. If you do not receive any results, adjust your search criteria.

Select the Company Name of the employer you wish to review.

# Convert Local Employer Site to Lead

**Adobe Inn-Carmel**

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**Employer Information**

**Physical Address:** Dolores St & 8th Ave  
Carmel, CA 93923-  
[Map Address](#)  
[ADOBEINN.COM](http://ADOBEINN.COM)

**Website:**

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**Other Information**

**Business Description:** Bed & Breakfast Accommodations  
**Employee Size Range:** 5-9  
**NAICS Code(s):** 721191 - [Bed-and-Breakfast Inns](#)  
721110 - [Hotels \(except Casino Hotels\) and Motels](#)  
**Location Type:** Single location firm  
**Sector Entity:** Private  
**Employer's Last Update:** 2015/02

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**Available Jobs By Occupation**

There is no data available for Adobe Inn-Carmel in California.

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**Contact Information**

**Contact:** Sergio Javier  
**Title:** Manager  
**Telephone:** (831) 624-3933

[Convert to Lead](#)

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To convert this employer into a Marketing Lead, select the Convert to Lead link at the bottom of the page. When creating the Marketing Lead, some information may be auto-filled. Complete the required fields and save the Lead.

## Convert a Marketing Lead

# Converting the Marketing Lead

Staff's Profile > Contact Management Profile >  
Summary Tab > Company Information

Company Information

### Company Details

**Legal Name:** [Sign Makers of Yuba](#)

**Doing Business As:** Not Specified

**Industry (NAICS):** Not Specified

**Street Address:** 555 Creative Ln.  
Sutter County  
Yuba City, CA 95991  
US

**Mailing Address:** 555 Creative Ln.  
Yuba City, CA 95991  
US

**Active Locations:** 1

**Active Contacts:** 1

**Non-Profit:** No

**Unique Abilities Partner:**

[ Edit ]

### Account Type

Marketing Lead  Recruiting

[ Update Account Type(s) ]

If an employer would like to become a Recruiting Employer, staff can easily convert the employer's Account Type from Marketing Lead to Recruiting Lead.

To make this change, while assisting the employer, expand their Staff's Profile folder. Next, expand the Contact Management Profile folder and select the Summary link. Here, scroll down to the Company Information section (seen in this screenshot).

## Converting the Marketing Lead

Step 1 – Deselect the Marketing Lead box and  
select Recruiting check box

**Account Type**

Marketing Lead

Recruiting

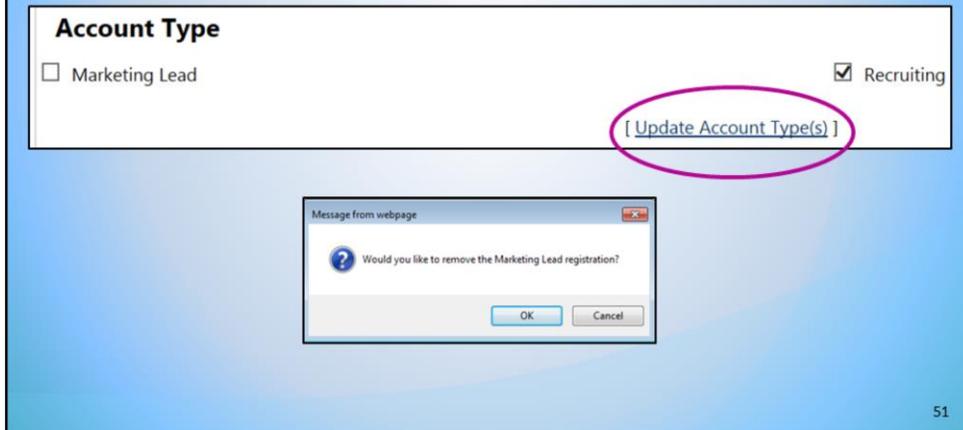
[ [Update Account Type\(s\)](#) ]

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In the Account Type section, select the Recruiting box and *deselect* the Marketing Lead box.

# Converting the Marketing Lead

Step 2 - Select Update Account Type link



Next, select the Update Account Type link.

If you did not deselect the Marketing Lead box, you will receive a pop-up message asking if you would like to remove the Marketing Lead registration. Select “OK”, and the Lead will be deselected and you will be directed to create the Recruiting Employer. **Do not** select “Cancel”, as both account types will be selected, which is not acceptable in the CRM module.

After completing the required fields to convert the Marketing Lead to a Recruiting Employer, the additional information is reviewed through the CalJOBS vetting process. This includes entering the employer’s EDD Account number. If the additional information does not match the information CalJOBS uses to vet the employer, the employer’s account will be locked out and the employer will receive an email or call from the CalJOBS Employer Help Desk to attempt to resolve the discrepancy.

# CRM Reports

# CRM Reports

Reports > Detailed Reports > CRM Reports

CalJOBS Client Relationship Management Reports

Staff Activity:

Advanced

- [List](#)
- [by Outcome](#)
- [by Staff](#)
- [by Registration Type](#)
- [by Office](#)
- [by Region](#)
- [by Work Item](#)
- [by Staff Work Item](#)

Reports > Detailed Reports > Services Reports > Services Provided Employer

Services Reports

[Services Provided Employer](#) ← Display Service Provided Employer Reports

[Services Provided Individuals](#) Display Services Provided Individuals Reports

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Detailed CRM Reports are available for the tracking of Work Items and activities provided to Marketing Lead employers. These reports can be useful in tracking and determining the effectiveness of the employer recruitment efforts. You can see the filters here by which you can determine what information will show in a report.

In addition, the [Services Provided Employer](#) report can be used to track employer activity codes entered for Marketing Leads.

## Important to Know



- The system allows job referrals to be made only to a Recruiting employer.
- When a Marketing Lead is converted to a Recruiting Employer, the employer information will be verified by the WSD staff, per standard vetting procedure.
- Please remove the Marketing Lead designation when converting the account to a Recruiting Employer.

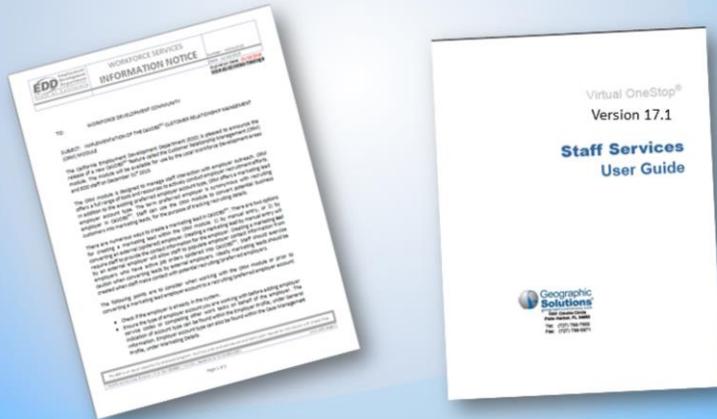
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Here are some important points to know:

- Job referrals can still only be made to recruiting employers.
- When a Marketing Lead is converted to a Recruiting Employer, the employer information will be verified by the WSD staff, per standard 72- hour vetting procedure.
- Deselect the Marketing Lead box when converting to a Recruiting Employer. When you search for employers, you will choose between marketing lead or recruiting employers.

## Other Resources and Help

- Workforce Services Information Notice [15-21](#)
- [Staff User Guide, Chapter 34](#)



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These resources will give further, detailed information about using the CRM module. Please reference the WSIN 15-21 for more detailed information and instructions on the CRM module in CalJOBS. In addition, refer to Chapter 34 of the Staff User Guide.

# Questions



For any questions concerning this module, please contact the CalJOBS Education and Development Unit at [CalJOBSTrainingTeam@edd.ca.gov](mailto:CalJOBSTrainingTeam@edd.ca.gov).