

**A-SUITE**



# **Quick Start Guide – Agency and Recruit**



# Quick Start Contents



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**Where Do I Find My Candidates?**





## WHERE DO I FIND MY CANDIDATES?

# Candidate Browser

The Candidate Browser is where you can see your candidates

You are easily able to see Tags, Notes, and complete tasks like Send SMS Messages.

The screenshot shows the 'CANDIDATES' browser interface. Callout 1 points to the 'CANDIDATES' header and 'DEFAULT' view. Callout 2 points to the 'Filters' button. Callout 3 points to the 'LAST NAME' column header.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	APP DAYS IN FUNNEL	FIRST NAME	LAST NAME	PRIMARY PHONE	STATUS	POSITION
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	57	Courtney	Ferguson	(440) 555-1472	Candidate [Active]	Class A CDL - Refined Fuel ...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	57	Mary	Love	(440) 555-1472	Candidate [Active]	Class A CDL - Refined Fuel ...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	57	Julie	Jones	(440) 555-1472	Candidate [Active]	Class A CDL - Refined Fuel ...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	57	Lauraa	Wilsona		Candidate [Active]	Class A CDL - Refined Fuel ...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	57	Thomas	Figuroa	(440) 555-1472	Candidate [Active]	Class A CDL - Refined Fuel ...
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	56	John	Smith	(234) 567-890	Candidate [Active]	Undefined
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	56	Alice	Jones	(233) 445-6321	Candidate [Active]	Undefined

### HOW TO ACCESS THE CANDIDATE BROWSER:

1

2

3



HOVER TO  
**CANDIDATES**

CLICK ON  
**CANDIDATES**



## WHERE DO I FIND MY CANDIDATES?

# Candidate Browser – Peek View

Want more information on a candidate?

Get a condensed or summary view of a candidate or team member's user profile without leaving the browser screen (right side slide out)

### HOW TO ACCESS A CANDIDATE'S PEEK VIEW:

1

CLICK INTO YOUR CANDIDATE'S LINE ITEM, AND PEEK VIEW WILL SLIDE OUT FROM THE RIGHT.

The screenshot displays the 'Candidate Browser' interface. At the top, there is a search bar with the text 'Suite v3.72.3' and a search icon. Below the search bar, there is a table with columns: 'APP DAYS IN FUNNEL', 'FIRST NAME', 'LAST NAME', and 'PRIMA'. The table contains four rows of candidate data:

APP DAYS IN FUNNEL	FIRST NAME	LAST NAME	PRIMA
57	Courtney	Ferguson	(440) 555
57	Mary	Love	(440) 555
57	Julie	Jones	(440) 555
57	Lauraa	Wilsona	

To the right of the table, a 'Peek View' for Courtney Ferguson is displayed. It includes a profile picture, contact information (email: tony.grgetich+test-162514@avatarfleet..., phone: (440) 555-1472), location (US), last login status (Never), and creation date (12/11/2022, 09:28 PM). Below the profile information, there are tabs for 'Profile' and 'Notes'. The 'Profile' tab is active, showing fields for SSN (\*\*\*-\*\*-2514), Birthdate (12/31/\*\*\*\*), and Name (Scott, Roberta).

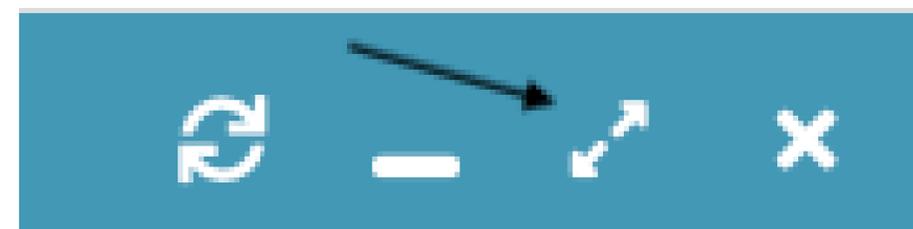
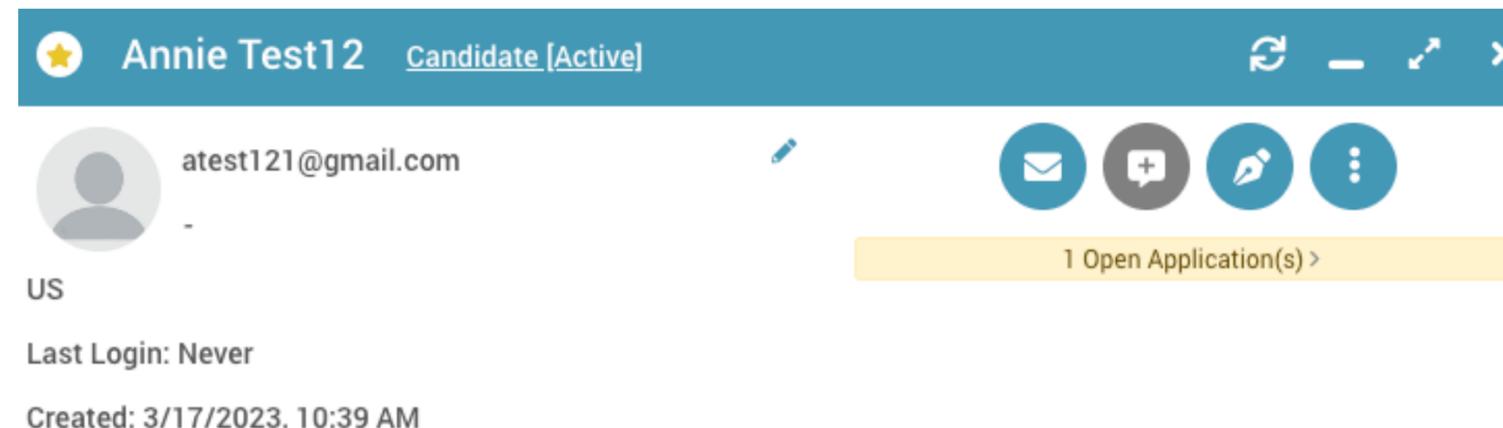


## WHERE DO I FIND MY CANDIDATES?

# Candidate Browser – Profile View

Want even more information on a candidate?

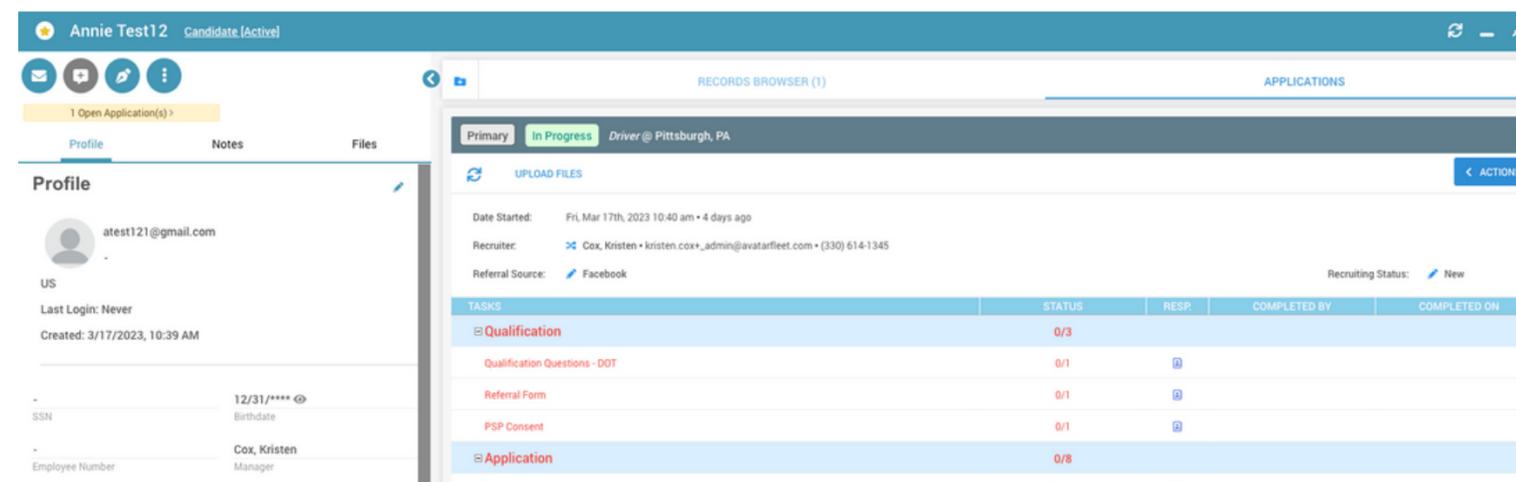
This is where you'll bring the full detail into view and be able to do all of the same actions, tasks and activities that you're currently used to in A-Suite today.



### HOW TO ACCESS A CANDIDATE'S PROFILE:

1

CLICK ON THE FOCUS ICON AT THE TOP OF PEEK VIEW TO ACCESS A USER'S PROFILE





**How Do I Prioritize My Candidates?**

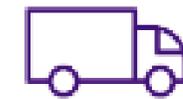


## HOW DO I PRIORITIZE MY LEADS?

### METHOD 1

# Use Our Pre-Loaded Saved Views

We've pre-populated your system with our best-practice "Saved Views" so you will only see the highest quality candidates based on the information they've submitted through an application or a lead form.



# Info Collected During Application Process:

## CDL Experience

- N/A
- None
- CDL Grad School
- CDL Grad
- 1-5 mos
- 6-11 mos
- 1 Year
- 2 Years
- 3 Years
- 4 Years
- 5+ Years

## Endorsements

- None
- DBL/TRP End.
- Hazmat End.
- Tank End.
- Pass. End.
- School Bus End.

## Equipment Experience

- Dry Bulk Exp.
- Dry Van Exp.
- Flatbed Exp.
- Intermodal Exp.
- Reefer Exp.
- Tanker Exp.
- Car Exp.

## Route Preference

- Local Pref.
- Regional Pref.
- OTR Pref.
- Dedicated Pref.



# Pre-Loaded Saved Views



## Qualified Leads By Experience

All of these leads meet your driving experience criteria.



## All Leads Created Last 3 Days

All leads that have been added into your A-Suite system in the past 3 days.



## Leads By Position

All leads that have applied for the positions in which you're actively hiring.



## All Leads Created Last 30 Days

All leads that have been added into your A-Suite system in the past 30 days.



## Leads By Location

All leads that fall within the hiring radius of your open positions, regardless of position.



## Candidates In Process

All candidates that are qualified and have moved into the steps of your hiring workflow.

# How Do I Start My Day?

1

## Check-In With Candidates In Process

Update your candidates on progress of the hiring process.

**Saved View to Use:**  
Candidates In Process

2

## Contact New Leads Created Yesterday

Start your new leads on the 3 Ways/3 Days outreach.

**Saved View to Use:**  
All Leads Created Last 3 Days

3

## Follow-Up with 3 Ways/3 Days

Conduct the next step of the 3 Ways/3 Days outreach.

**Saved View to Use:**  
All Leads Created Last 3 Days

4

## Check Activity of 30 Day No Responses

Conduct the next step of the 3 Ways/3 Days outreach.

**Saved View to Use:**  
All Leads Created Last 30 Days



## HOW DO I PRIORITIZE MY CANDIDATES?

### Method 2 Star Candidates

<input type="checkbox"/> ★ <input type="checkbox"/> ⋮	57	Courtney	Ferguson
<input type="checkbox"/> ★ <input type="checkbox"/> ⋮	57	Mary	Love

The ability to mark a candidate as good fit or high quality and also use that in filtering (so you can star candidates and come back to them later)





## HOW DO I PRIORITIZE MY CANDIDATES?

### Method 3

# Create Your Own Filters & Saved Views

Everyone who uses our system has different preferences on how they'd like to view candidates - so you can choose to set your own Filters and save these as a Saved Views.





## HOW DO I PRIORITIZE MY CANDIDATES?

# How to Create Filters

You have specific hiring criteria, depending on the position you're hiring for. Maybe candidates must have specific Endorsements or Years of Experience, or, maybe they need a Class B CDL.

With Filters, you're able to sort and view columns by your hiring criteria so you can eliminate all the names that don't match.

### HOW TO CREATE FILTERS:

1

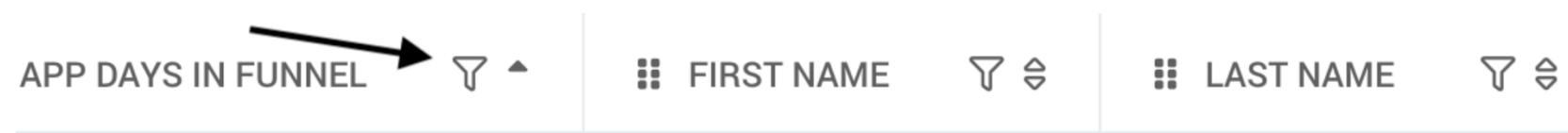
CLICK ON THE INDIVIDUAL FILTER ICONS BY COLUMN HEADERS

AND OR

2

CLICK THE LARGE FILTERS ICON BY THE REFRESH ICON FOR A VIEW OF QUICK AND COMMON FILTERS

1



2



### Filters

[Back to Summary](#)

#### Quick Filters

- Approved Candidates
- Contingent Candidates
- Rejected Candidates
- Starred Candidates
- Withdrawn Candidates

#### Common Filters

- App. Assignee
- App. Fun.
- App. Job
- App. Location



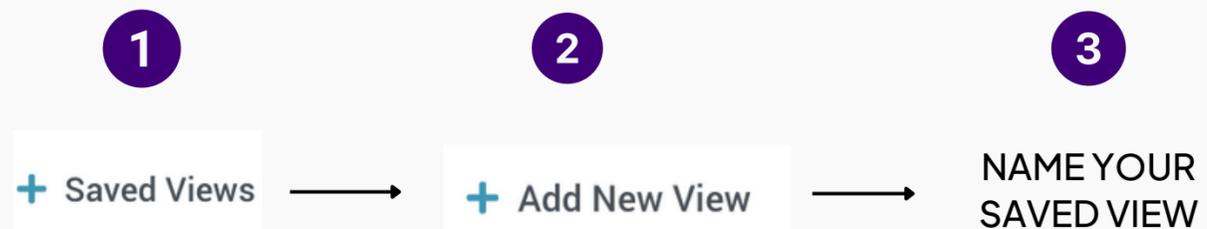
## HOW DO I PRIORITIZE MY CANDIDATES?

# How To Save A View

Now that you've set your Filters, you can save these views so you don't have to filter your data each and every time you view your candidates.

By using Saved Views, you're becoming more efficient by eliminating the data you don't need, and prioritizing only the top-quality candidates.

### HOW TO SAVE A VIEW:



The image illustrates the process of saving a view in three steps:

- 1** Click on the **Saved Views** menu.
- 2** Click on the **+ Add New View** button.
- 3** In the **Name Your Saved View** dialog box, enter a unique name for the saved view (e.g., **Pittsburgh Drivers**) and click **SAVE**.



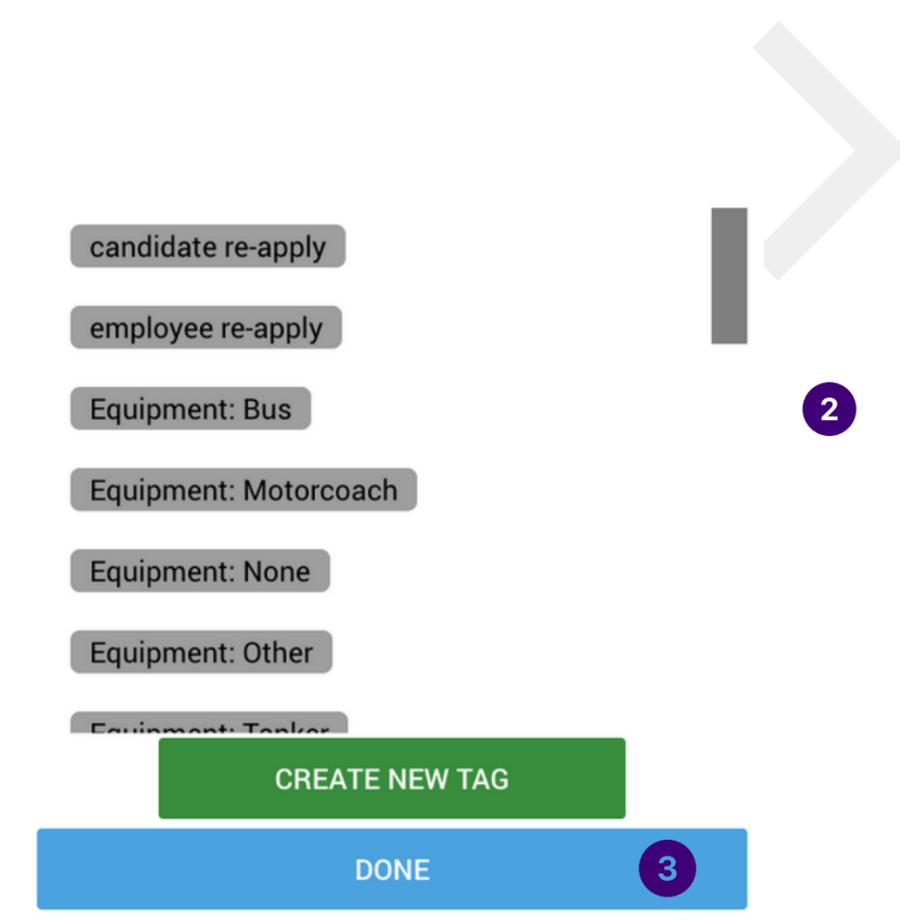
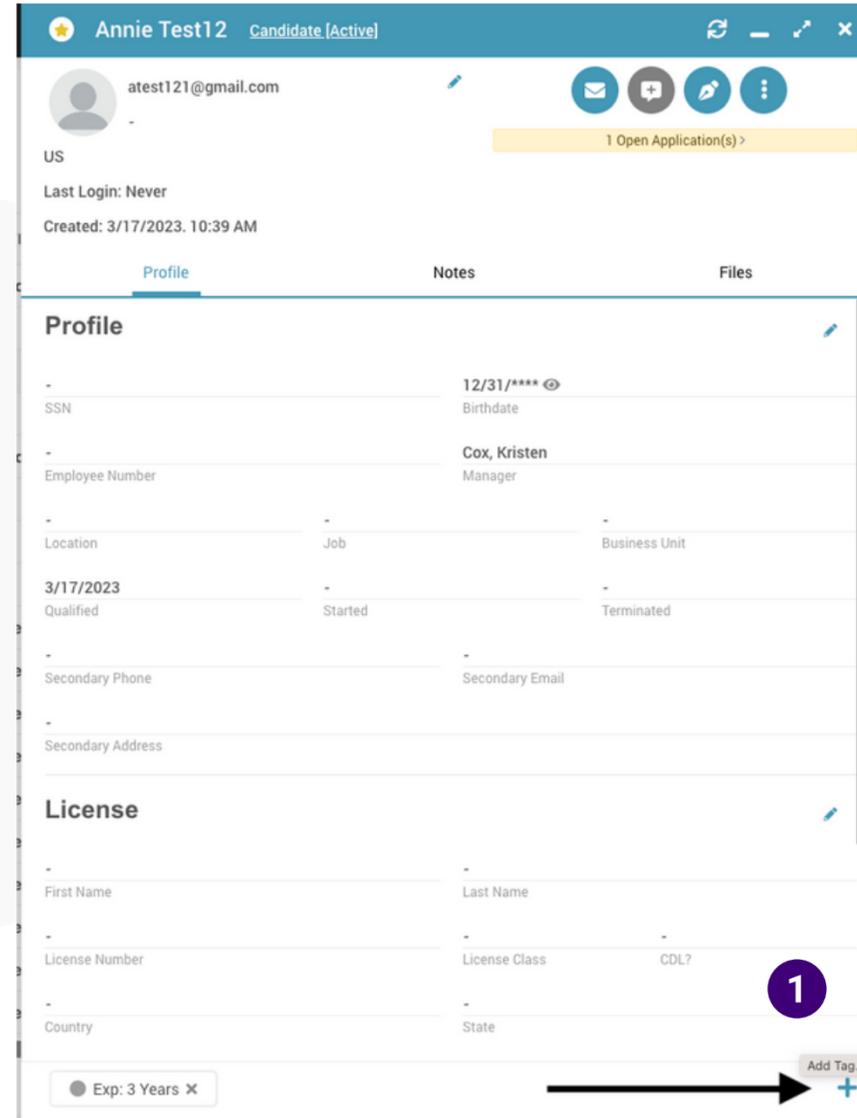
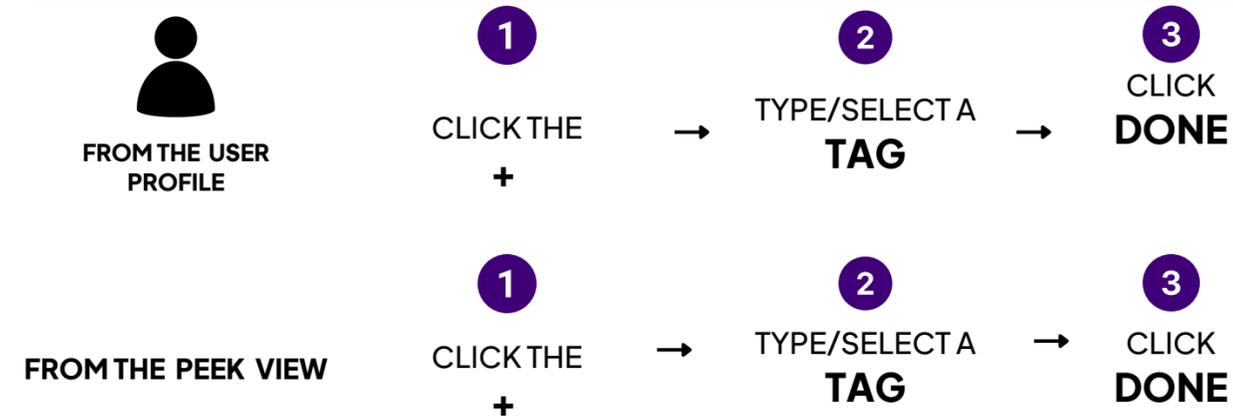
# HOW DO I PRIORITIZE MY CANDIDATES ?

## Tag Your Candidates

Tags are a great way to organize and prioritize your candidates through the use of custom names or phrases.

We've pre-loaded your A-Suite account with our recommended Tags, but you can customize these to whatever you'd like to fit your workflow.

### HOW TO TAG CANDIDATES:





**How Do I Save Myself Time?**





## HOW DO I SAVE MYSELF TIME?

# Quick Actions

Use Quick Actions to save yourself time. Instead of jumping into a profile or peek view, you can stay directly on the candidate browser and send and email, send a text message, create a note, create a Todo or mark a candidate as viewed or not viewed.

### HOW TO COMPLETE A QUICK ACTION:

1

CLICK THE  
KABOBICON  
BY YOUR  
CANDIDATE



2

MAKE YOUR  
QUICK  
ACTIONS  
SELECTION

The screenshot shows a candidate browser interface. At the top, there are filters for 'Sort By', 'APP DAYS IN FUNNEL', and 'FIRST NA'. Below this is a list of candidate rows. The first row is for 'Jeremy' with a value of '0' in the 'APP DAYS IN FUNNEL' column. A dropdown menu is open over the first row, triggered by a 'kabobicon' (three dots) which is highlighted with a purple circle '1'. The menu contains the following options: 'Send Email', 'Send Text Message', 'Create Note' (highlighted with a purple circle '2'), 'Create Todo', and 'Mark Viewed'. The candidate names listed are Jeremy, test, Annie, Ann, bob, and Tony.



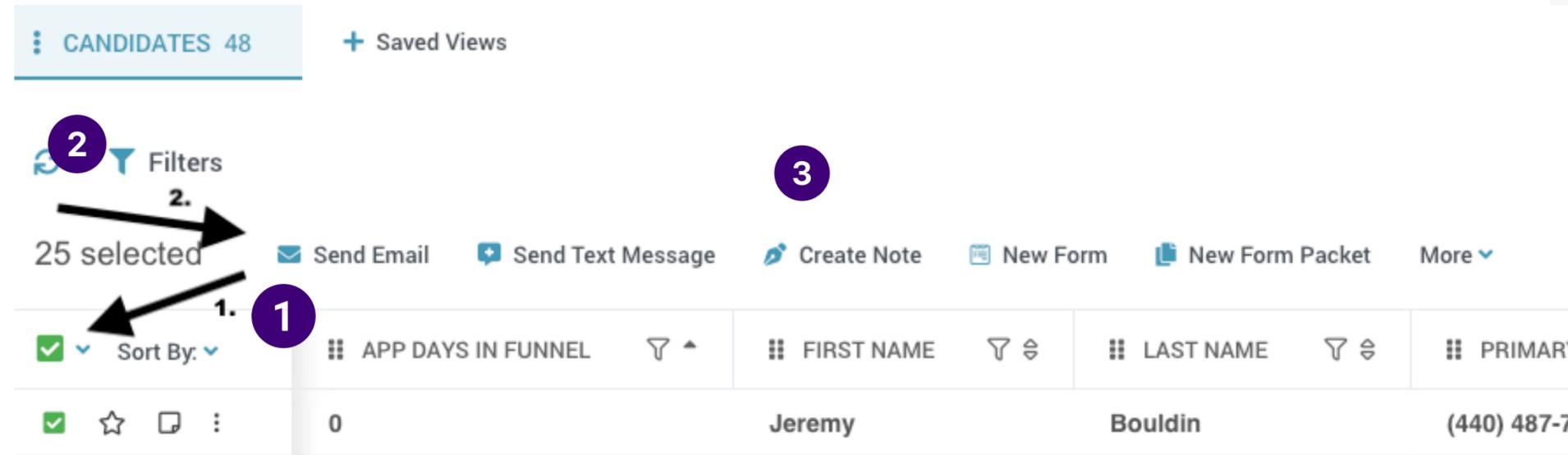


## HOW DO I SAVE MYSELF TIME?

# Mass Actions

Use Mass Actions to save yourself time. Instead of completing an action multiple times across different candidates, use mass actions to complete tasks en masse.

To name just a few mass actions: Send email, send text message, create note, create/send a form or form packet, and more!



### HOW TO COMPLETE A MASS ACTION

1

CLICK THE MASS ACTIONS CHECK BOX

2

THE MASS ACTIONS MENU WILL APPEAR

3

SELECT YOUR MASS ACTION TASK



**How Do I Save Candidates for Later?**





## HOW DO I SAVE CANDIDATES FOR LATER?

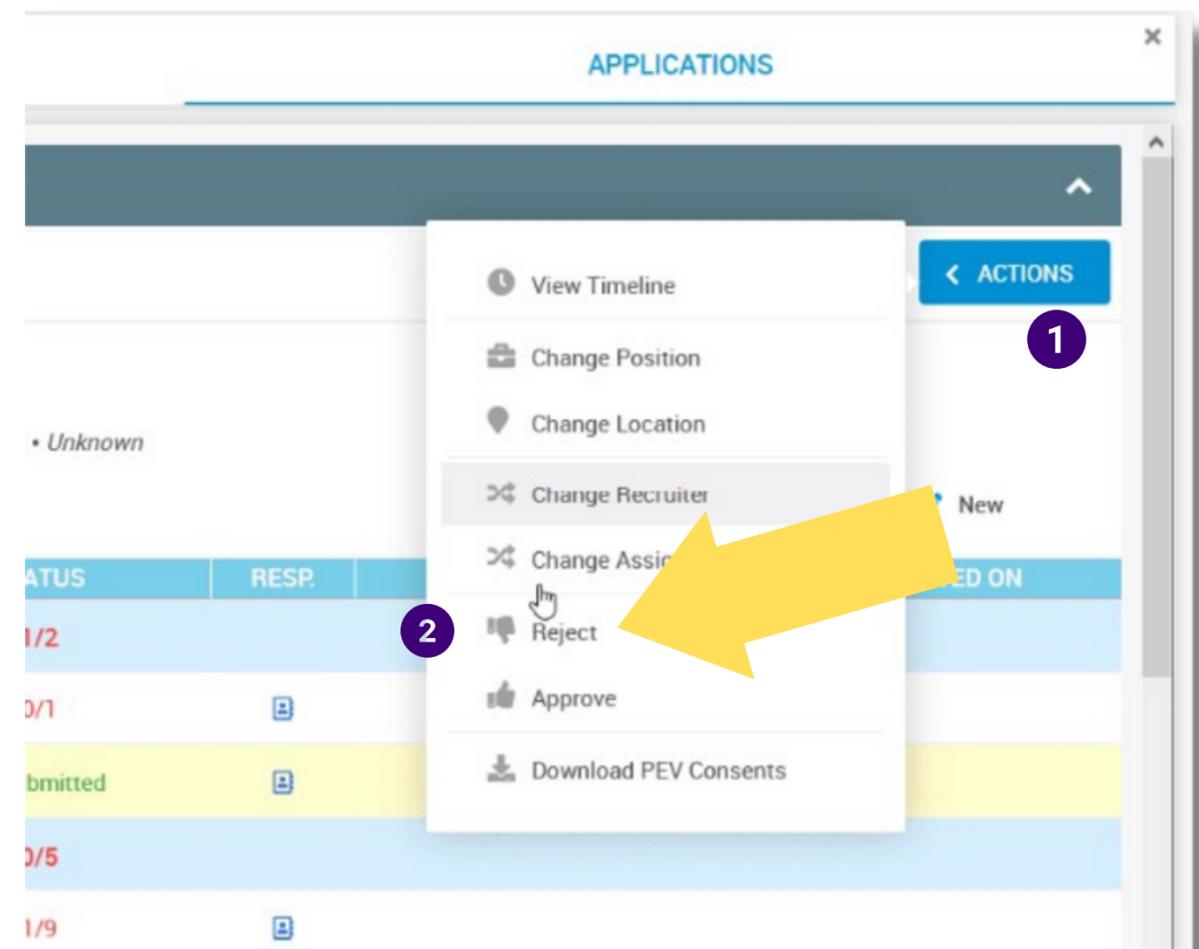
### Reject and Set a Rejection Reason

When a candidate doesn't meet the hiring criteria for an open position, you can Reject them.

Rejecting is important because it keeps your list of qualified, active candidates list clean and manageable.

 **IMPORTANT**

Rejecting a candidate will NOT delete them from your A-Suite account, nor will it remove them from any of your browser screens.



#### HOW TO REJECT AND SET A REASON:



#### Reject Application

**3** Select a reason for rejecting this application

Profile Status Update (optional)  
Would you like to change this candidate's status?

New Status: Candidate [Rejected]

[CANCEL](#) [REJECT APPLICATION](#)



## **How Do I See Applications?**





# HOW DO I SEE APPLICATIONS?

1

## Viewing a DOT App

Once you've prioritized your candidates based on your hiring criteria, it's time to drill down to see if they'd make a good fit for your company.

If a lead has submitted a full or partial DOT app, you'll be able to see all their information from their User Profile.

☐ ☆ ☐ ⋮ 1077 Paul McCartney (724) 599-4749 Driver Pittsburgh, PA

PEEK VIEW

Paul McCartney Candidate [Active] Unset

✓ paul@example.com  
✓ (724) 599-4749

123 North Main Street North Quincy, MA 02171 US  
Last Login: 3/1/2022, 09:02 AM  
Created: 4/10/2020, 03:13 AM

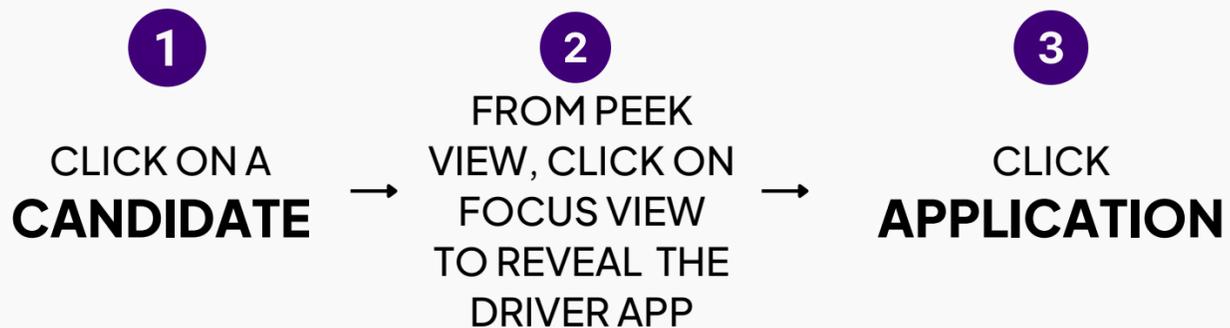
1 Open Application(s) >  
DO NOT DISPATCH >  
1 Failed Record(s) >  
1 Missing Record(s) >

Profile Notes Files

**Profile**

\*\*\*-\*\*-9878 SSN 6/18/\*\*\*\* Birthdate  
12344 Employee Number Cox, Kristen Manager

### HOW TO VIEW A DOT APP:



Profile Notes Files

**Profile**

✓ paul@example.com  
✓ (724) 599-4749

123 North Main Street North Quincy, MA 02171 US  
Last Login: 3/1/2022, 09:02 AM  
Created: 4/10/2020, 03:13 AM

\*\*\*-\*\*-9878 SSN 6/18/\*\*\*\* Birthdate  
12344 Employee Number Cox, Kristen Manager

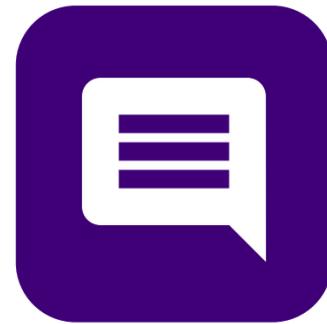
Pittsburgh, PA CDL DOT Position

UPLOAD FILES

**PROFILE VIEW**

Date Started: Fri, Apr 10th, 2020 11:13 am • 3 years ago  
Recruiter: Cox, Kristen • kristen.cox+\_admin@avatarfleet.com • (330) 614-1345  
Referral Source: Recruiting.com Recruiting Status: Connected

TASKS	STATUS	RESP.	COMPLETED BY	COMPLETED ON
<b>Qualification 3/3</b>				
Qualification Questions - DOT	Complete	📄	McCartney, Paul	Fri, Apr 10th, 2020 11:14 am
Referral Form	Complete	📄	McCartney, Paul	Fri, Apr 10th, 2020 11:14 am
PSP Consent	Complete	📄	McCartney, Paul	Wed, Sep 22nd, 2021 2:50 pm
<b>Application 7/8</b>				
DOT Application	Complete	📄	McCartney, Paul	Wed, Sep 22nd, 2021 2:49 pm
Send Email: Thank You For Applying	Complete	📧	McCartney, Paul	Wed, Sep 22nd, 2021 2:49 pm



## **How Do I Communicate With My Candidates?**



## Our Methodology: 3 Touches in 3 Ways in 3 Days....Until Contact is Made

**Call**



**Text**



**Email**





3 WAYS/3 DAYS

## Calling

Now that you've identified candidates to reach out to based on their application information, it's time to hit the phones.

Every company's hiring process is different - some need a complete DOT app before moving to the next step, and some want to jump right into open interviews.

Your call script should be short, concise and indicate a clear call-to-action as to what the next step of the process is

### IMPORTANT

If contact is made, change the Status from "New" to the applicable Status title.

### Call Script Example:



Paul,

You look like a great fit to drive for [your company]...with your driving experience, you'd be a great match for our team.

Here's what I need you to do next...[insert next step of the hiring process here]

If you have any questions, contact me at [phone number] anytime.

Thank you!





# A-SUITE COMMUNICATION

## Mass Texting in A-Suite

There are two ways to text a candidate in A-Suite: in mass, or, on a one-to-one basis.

With Mass Texting, you can SMS Message all opted-in candidates with the same message...in mass!

You can choose to use a pre-built template, or, write your own on the fly.

1

2

3 selected    Send Email    Send Text Message    Create Note    New Form    New Form Packet    More

Sort By: v	APP DAYS IN FUNNEL	FIRST NAME	LAST NAME	PRIMARY PHONE
<input checked="" type="checkbox"/> ☆ □ ⋮	147	Phillip	Walker	(967) 187-0380
<input checked="" type="checkbox"/> ☆ □ ⋮	226	Pete	Best	(330) 967-5309
<input checked="" type="checkbox"/> ☆ □ ⋮	1077	Paul	McCartney	(724) 599-4749

3

Send SMS \_ □ ×

7 people may have phone numbers NOT marked as mobile and will NOT receive a message. Additionally, any people that have opted out of receiving mass communications will NOT receive a message.

Recipients  
35 Recipient(s)

Template  
[Yellow dropdown menu]

Message  
Edit Variable Fields

Edit Variable Fields

↶ ↷ Ω

CANCEL
SMS ALL



### HOW TO SEND A MASS TEXT IN A-SUITE:

1



SELECT MASS ACTIONS

2

Send Text Message

CLICK SEND A TEXT MESSAGE

3



CHOOSE/TYPE YOUR TEMPLATE OR MESSAGE  
CLICK SMS ALL



## A-SUITE COMMUNICATION

# Individual Texting in A-Suite

Texting an individual contact can also be done within A-Suite

You can send text messages from the Peak View or from the User Profile from where you see the message icon.

**YOU CAN SEND TEXT MESSAGES WHERE YOU SEE THIS ICON :**



[WATCH VIDEO](#)

The screenshot shows the user profile for 'Ann Test', a Candidate [Active]. At the top, there are four circular icons: an envelope, a speech bubble with a plus sign, a pen, and a three-dot menu. A yellow arrow points to the speech bubble icon. Below the icons is a yellow notification bar that says '1 Open Application(s) >'. The profile card below has tabs for 'Profile', 'Notes', and 'Files'. The 'Profile' tab is active, showing the user's name, email address (ann.gemellas+55@avatarfleet.com), phone number ((412) 398-1993), location (US), last login status (Never), and creation date (12/19/2022, 12:49 PM). A large grey arrow on the right side of the screenshot points to the right.



## A-SUITE COMMUNICATION

# Mass Emailing in A-Suite

Similar to Mass Texting in A-Suite, you can send email messages to Candidates in mass.

Once you've created your Task List, you can select the icon, and then you'll be prompted to follow steps to send out emails to your selected leads.

3 selected 2 Send Email Send Text Message Create Note New Form New Form Packet More

**1** Sort By: APP DAYS IN FUNNEL FIRST NAME LAST NAME PRIMARY PHONE

APP DAYS IN FUNNEL	FIRST NAME	LAST NAME	PRIMARY PHONE
147	Phillip	Walker	(967) 187-0380
226	Pete	Best	(330) 967-5309
1077	Paul	McCartney	(724) 599-4749

**3** **New Email** Close

Send To:  + CC

Template:

Subject:

Edit View Insert Format Tools Table Variable Fields

Undo Redo Paragraph Verdana 9pt B I U S  
A Color Align Left Align Center Align Right Justify Decrease Indent Increase Indent Link Unlink Omega Smiley

CANCEL SEND EMAIL

### HOW TO SEND A MASS EMAIL IN A-SUITE:

**1**



SELECT MASS ACTIONS

**2**

Send Email

CLICK SEND EMAIL

**3**



CHOOSE/TYPE YOUR  
**TEMPLATE OR MESSAGE**  
CLICK SEND EMAIL



## A-SUITE COMMUNICATION

# Individual Emailing in A-Suite

Emailing an individual contact can also be done within A-Suite.

You can send Emails from the Peak View or from the User Profile from where you see the Email icon.

**YOU CAN SEND EMAILS WHERE YOU SEE THIS ICON:**



Pete Best Candidate [Active] Unset

pete@aol.com  
(330) 967-5309

123 Liverpool Street Schenectady, NY 12345 US

Last Login: 8/8/2022, 08:35 PM

Created: 8/8/2022. 08:34 PM

1 Open Application(s) >

A purple arrow points to the email icon in the top right navigation bar.

Pete Best Candidate [Active] Unset

1 Open Application(s) >

Profile Notes Files

**Profile**

pete@aol.com  
(330) 967-5309

123 Liverpool Street Schenectady, NY 12345 US

Last Login: 8/8/2022, 08:35 PM

Created: 8/8/2022, 08:34 PM

\*\*\*-\*\*-7654 SSN 11/24/\*\*\*\* Birthdate

**RECORDS**

Primary In Progress Driver@ Pittsburgh, PA

UPLOAD FILES

Date Started: Mon, Aug 8th, 2022 8:34 pm • 8 months ago

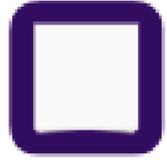
Recruiter: Cox, Kristen • kristen.cox+\_admin@avatarfleet.com • (330) 614-1345

Referral Source: Indeed

TASKS	STATUS	RESP.	COM
<b>Qualification 2/3</b>			
Qualification Questions - DOT	Complete		
Referral Form	Complete		
PSP Consent	0/1		

A purple arrow points to the email icon in the top left navigation bar.





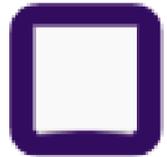
## STATUSES



# Statuses Are Key To Working With Our Agency

We create lists of contacts to market to based on their Status. It's URGENT that you keep the Status of your leads updated in order for our teams to work cohesively.

*Attempting to  
Contact*



## YOUR PRE-LOADED STATUSES

### **New**

New leads you have not yet reached out to.

### **Candidate Review**

Lead has completed all application steps and is under review from management.

### **Attempting Contact**

Leads you have tried to reach out to but haven't been able to successfully connect with yet.

### **Scheduled for Orientation**

All leads that have been added into your A-Suite system in the past 30 days.

### **Actively Engaged**

Leads you've been able to make contact with but are not yet through the application process.

### **Unqualified**

These are leads you've determined aren't a good fit for your position.

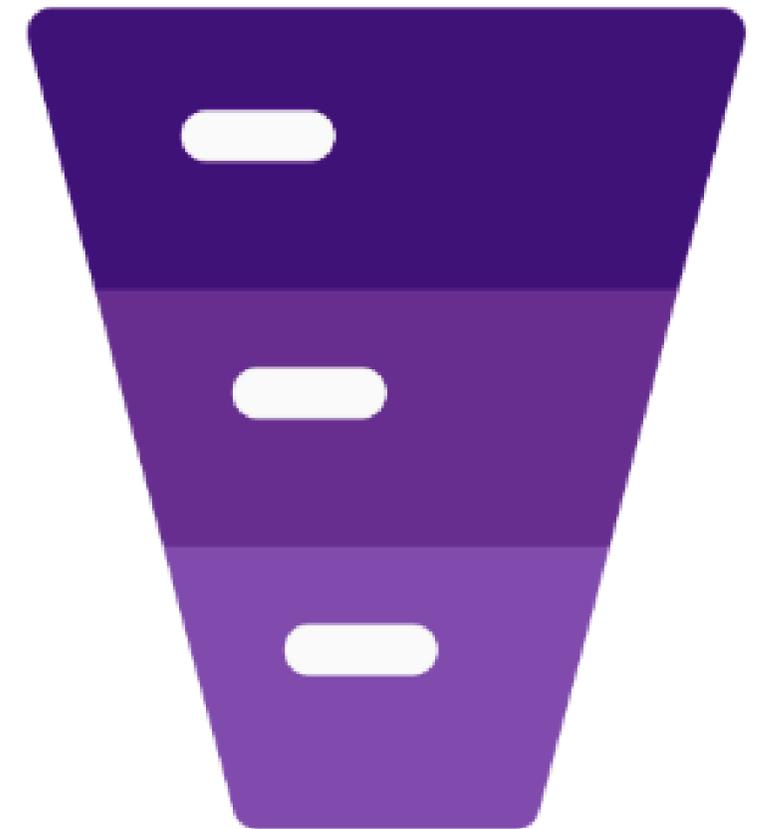


## WORKFLOW STAGES



# Workflow Stages Are Key To Understanding Where Candidates Fall Off

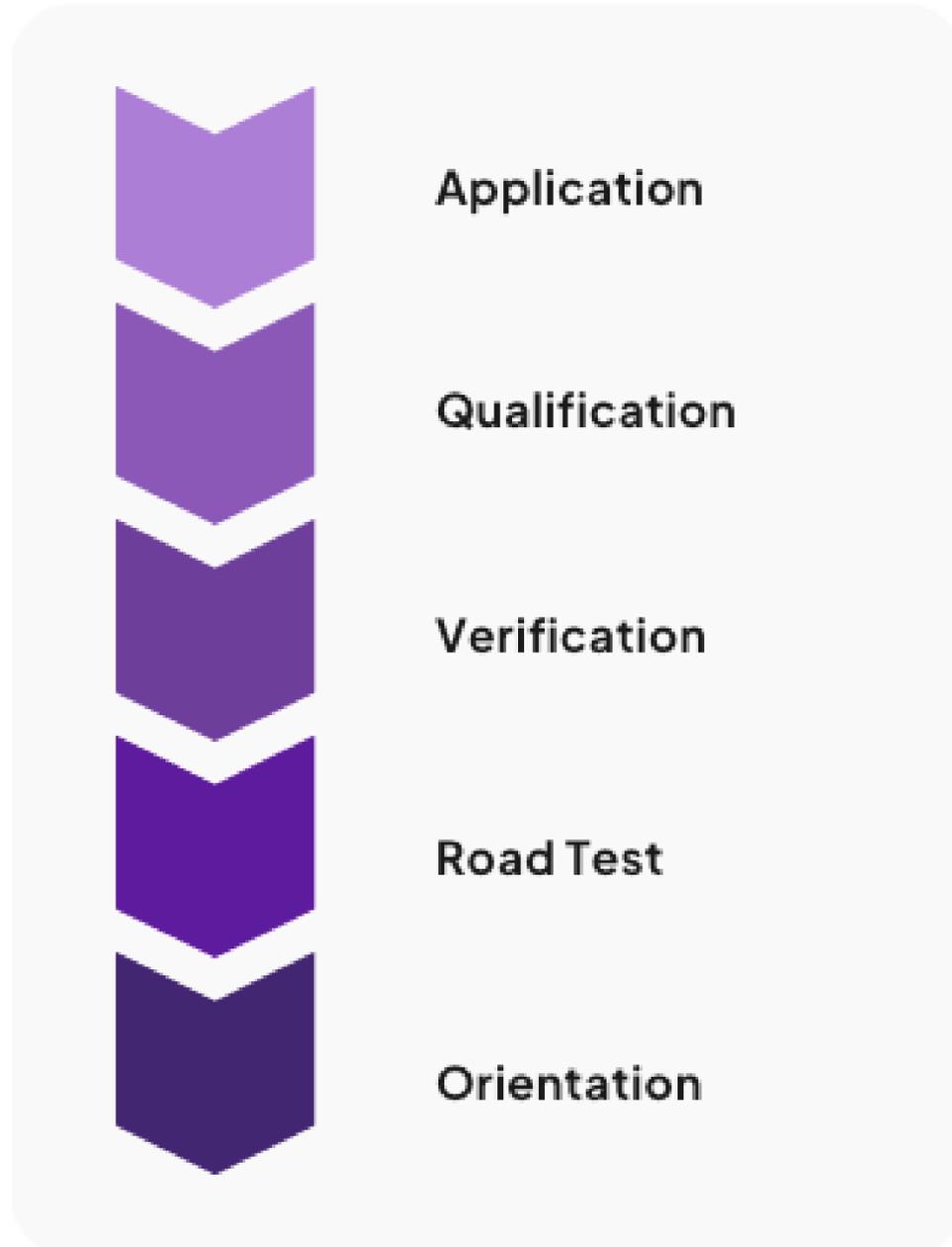
Every company has it's own hiring workflow stages. It's critical that you keep your stages consistent across positions so you can track stage-to-stage conversion rates - this metric will help you understand where candidates are getting caught up along the hiring process.



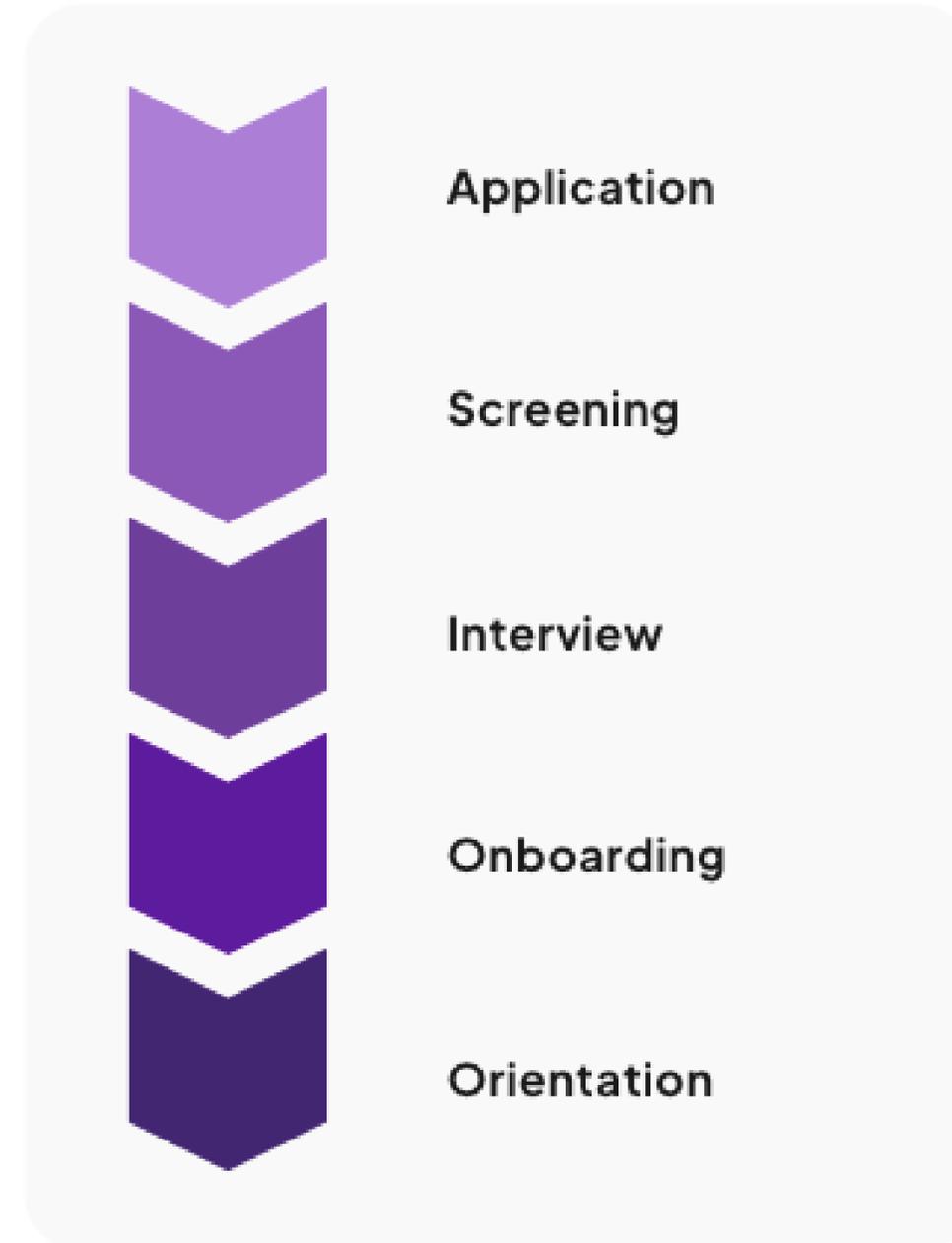


## SAMPLE WORKFLOW STAGES

Example 1



Example 2



Thank you!

**We're Here  
to Help!**

(888) 981-4724 | [support@avatarfleet.com](mailto:support@avatarfleet.com)

