

Referral Portal

Offered at no cost to our clients, ATS OnDemand offers a Referral Portal for streamlining and tracking the referral process.

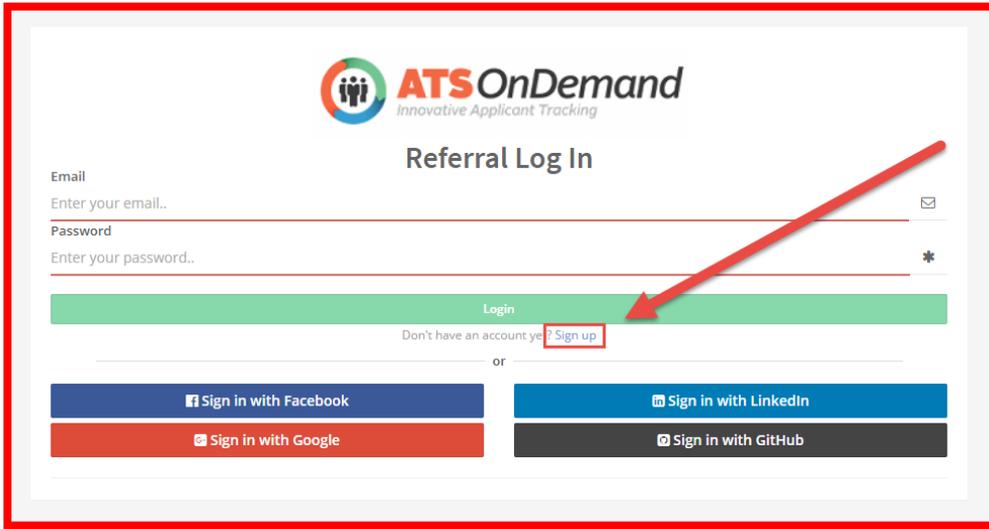
Any existing employee is able to create an account with the portal, by company email or social media. Once they have created an account, they can easily add friends and their skills and send them jobs that they believe they are a good fit for. Not only do your employees have the power, but the portal is able to match the friends to the best fit job for them!

Creating an Account

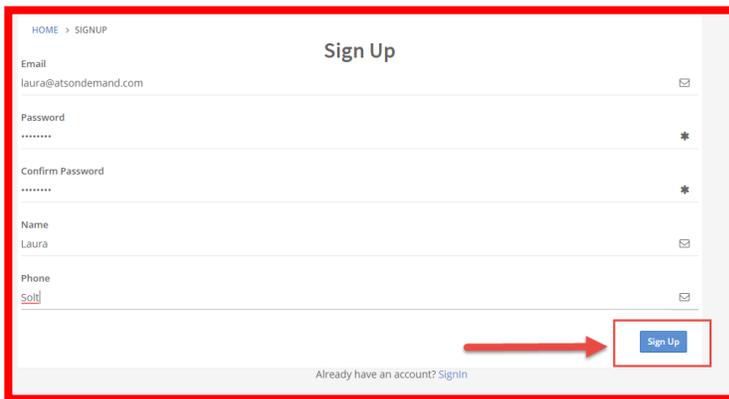
Creating an Account with Email and Password

When an employee comes to the referral portal log in page, there are several options for creating an account. An employee can create an account with an email and a password, or use several social media options to easily create an account and log in.

To create a new account, click “Sign up.”



The screenshot shows the 'Referral Log In' page. At the top is the ATS OnDemand logo. Below it are two input fields: 'Email' with the placeholder 'Enter your email..' and 'Password' with the placeholder 'Enter your password..'. A green 'Login' button is positioned below these fields. A red arrow points to a small 'Sign up' link located below the 'Login' button. Below the login section are four social media sign-in buttons: 'Sign in with Facebook', 'Sign in with LinkedIn', 'Sign in with Google', and 'Sign in with GitHub'.

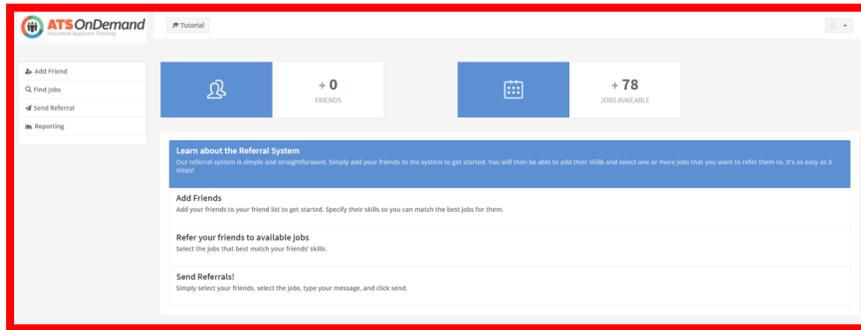


The screenshot shows the 'Sign Up' page. At the top left is a breadcrumb 'HOME > SIGNUP'. The title is 'Sign Up'. There are five input fields: 'Email' (with 'laura@atsondemand.com' entered), 'Password' (with '.....' entered), 'Confirm Password' (with '.....' entered), 'Name' (with 'Laura' entered), and 'Phone' (with 'Salt' entered). A red arrow points to a blue 'Sign Up' button at the bottom right. At the bottom left, there is a link: 'Already have an account? Signin'.

Fill out account information such as name, email, and password then click “Sign Up” again.

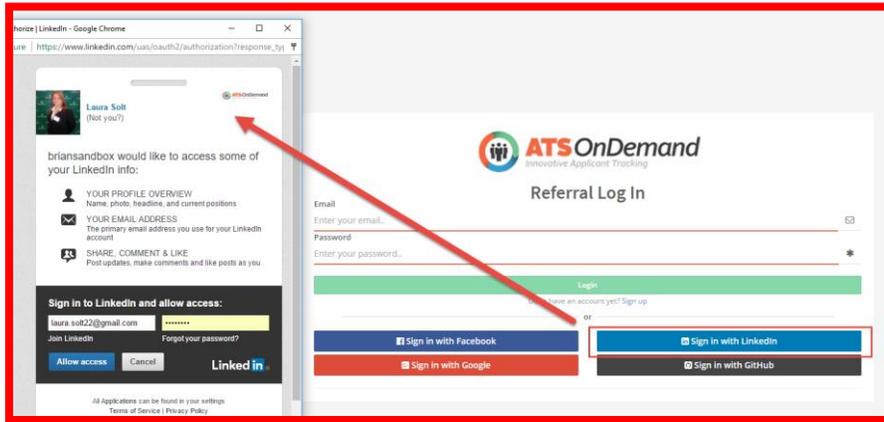


The page will then refresh to bring the user into the referral portal upon successful completion of account information.

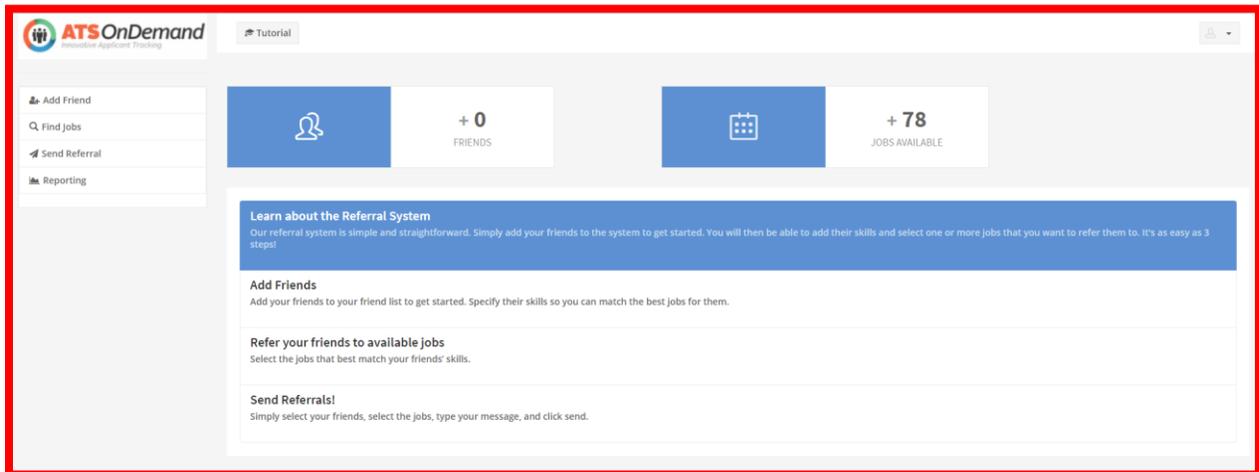


Creating an Account with Social Media

Select any social media option to open a new window to allow for access of information.

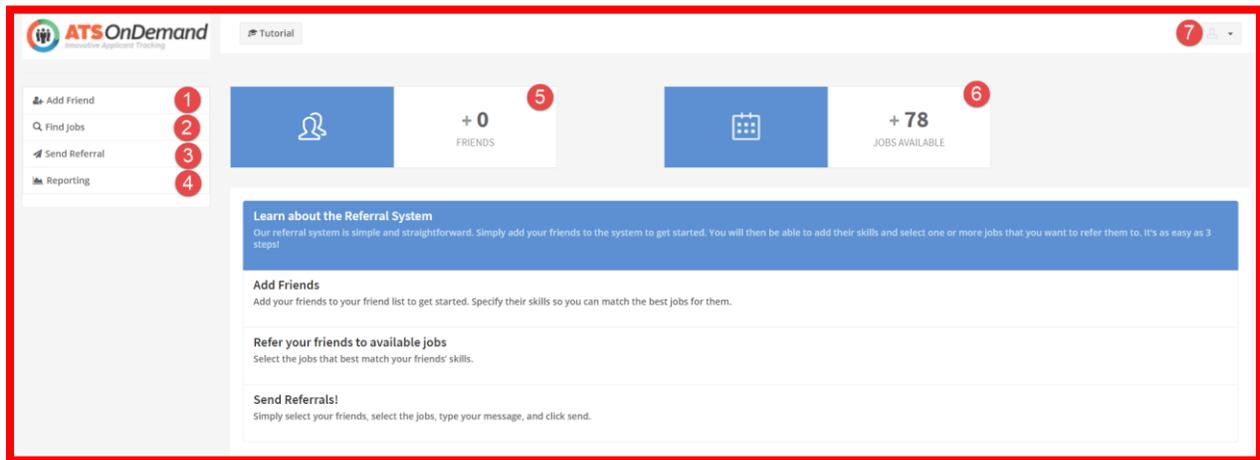


Once the social media account has been integrated the page will refresh to show the referral portal.



Overview of the Referral Portal

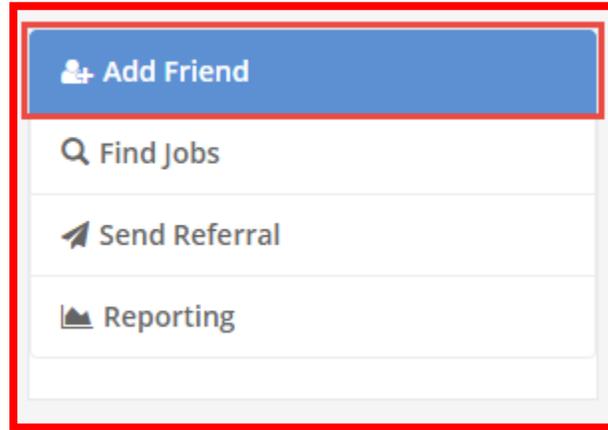
The referral portal offers a user friendly and interactive way for your employees to view the open positions for your company and refer their friends or family to that position. In this portion of the guide, discover the different sections of the referral portal before a more in-depth look!



1. **Add Friend:** this section allows users to add their friends or family members to the portal so that they can receive referral notifications
2. **Find Jobs:** this section contains a running list of all the currently active jobs from the ATS that are inside of the portal
3. **Send Referral:** this section is where the user can send emails to their added friends with the jobs that they believe are a good match
4. **Reporting:** this section shows the user how their friends are faring in the recruitment process
5. This tile is a short cut to sending a referral email to your friends
6. This tile is a short cut to a running list of all the currently active jobs from the ATS
7. Using this drop down, the user can edit their profile information

Add a Friend

In this section, a user can add their friends or family into the referral portal. To add a friend, click on “Add Friend”



To add a friend to the portal, the user need to enter the first and last name as well as email so that they can receive messages. The user can leave notes about their friend, and then must enter what their relationship is to the friend.

Add People to your friend list.

First Name	Last Name
<input type="text" value="Dana"/>	<input type="text" value="Agosta"/>
Email	
<input type="text" value="dagosta@gmail.com"/>	
Notes	
<input type="text" value="Dana is a hard working friend and co-worker. We worked together at ABC company and during my 2 years of employment we worked in the same department and occasionally on teams. She is a driven individual that can work well on teams and by herself."/>	
Relationship	
<input type="text" value="previous co-worker"/>	

After entering this basic information, the user can now “tag” their friend with skills. These skills match to the job keywords and calculate how much of a match the friend is to the job. To begin adding skills, click “Add Skill” to open a text box.

Skills

Enter your friend's skills, be as specific as possible so that they can be matched to the best jobs

[Add Skill](#)

To add multiple skills, click “Add Skill.”

Skills

Enter your friend's skills, be as specific as possible so that they can be matched to the best jobs

 ✕
[Add Skill](#)

If a skill is entered in error, the user can use the red x to remove it.

Skills

Enter your friend's skills, be as specific as possible so that they can be matched to the best jobs

 ✕
 ✕
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 ✕
[Add Skill](#)

Once all the information has been filled out, click “Update Friend.”

Add People to your friend list.

First Name: Dana
Last Name: Agosta
Email: dagosta@gmail.com
Notes: Dana is a hard working friend and co-worker. We worked together at ABC Company and during my 2 years of employment there we worked in the same department and occasionally on the same project teams. She is a driven individual that can work well on teams and by herself.
Relationship: previous co-worker

Skills
Enter your friend's skills, be as specific as possible so that they can be matched to the best jobs

- customer service
- typing
- microsoft suite
- marketing
- social media
- call center
- technical assistance

[Add Skill](#)

[Update Friend](#)

After the screen refreshes, the user will see that the friend has been added and saved to the right-hand side of the screen.

+ 1 FRIENDS + 78 JOBS AVAILABLE

Add People to your friend list.

First Name: Enter First Name
Last Name: Enter Last Name
Email: Enter email address
Notes: Enter your message here
Relationship: Please enter a relationship
Skills: Enter your friend's skills, be as specific as possible so that they can be matched to the best jobs

[Add Skill](#)

[Update Friend](#)

MY FRIENDS
Search Friends
Dana Agosta
previous co-worker

If the user needs to edit the friend information or add more skills, just click their name.

Add People to your friend list.

First Name: Last Name:

Email:

Notes:

Relationship:

Skills: Enter your friend's skills, be as specific as possible so that they can be matched to the best jobs

✕

✕

MY FRIENDS

Search Friends

Dana Agosta
previous co-worker

Find Jobs

The Find Jobs tab is a running list of all the currently active jobs inside of the ATS. The user can easily filter and narrow down the jobs list by typing into the search fields at the top.

Tutorial
⌵

- [Add Friend](#)
- [Find jobs](#)
- [Send Referral](#)
- [Reporting](#)

FIND JOBS

Job Title:

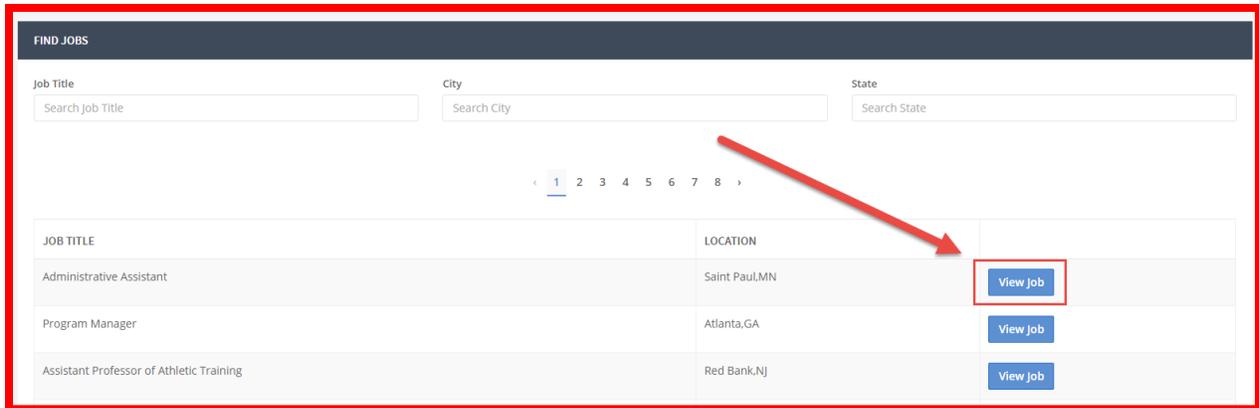
City:

State:

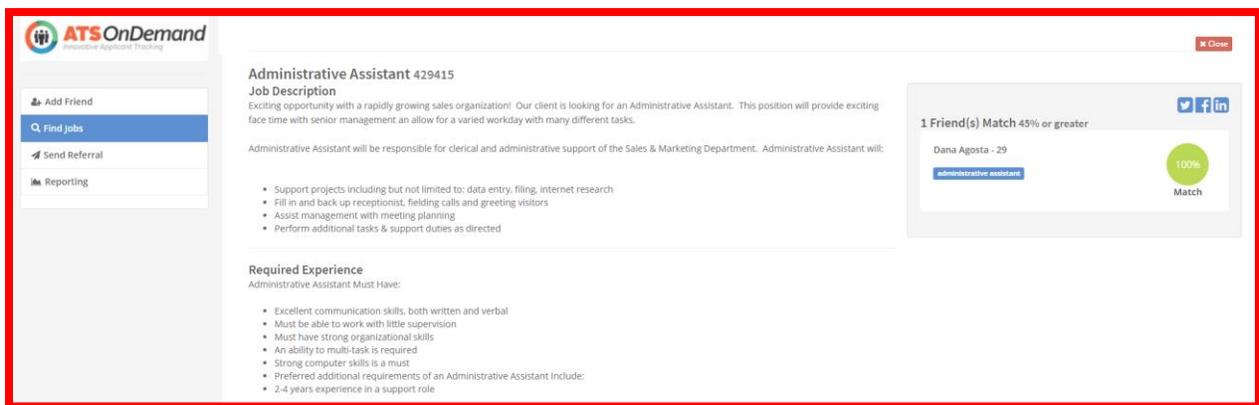
< 1 2 3 4 5 6 7 8 >

JOB TITLE	LOCATION	
Administrative Assistant	Saint Paul, MN	View job
Program Manager	Atlanta, GA	View job
Assistant Professor of Athletic Training	Red Bank, NJ	View job
Assistant Project Manager	San Diego, CA	View job
Research Associate III	San Diego, CA	View job
Inside Sales	Red Bank, NJ	View job
Assistant Project Manager	red bank, NJ	View job
Compliance Coordinator	New York, NY	View job
Administrative Assistant	Middletown, NJ	View job
Business Development Executive	red bank, NJ	View job

To read about the different jobs that the user can refer their friends too, click on “View Job.”



Once the page refreshes the user can read about the job description and required skills and experience.



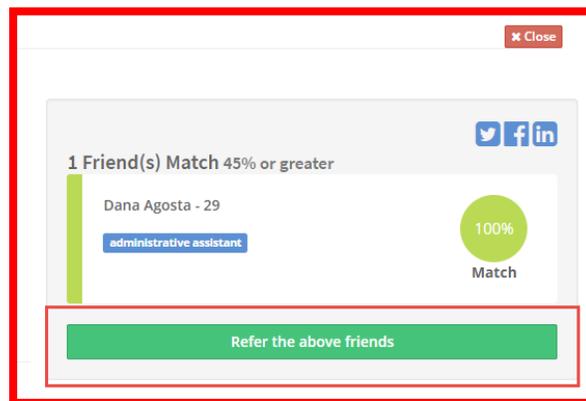
The right-hand side of the screen will show any friends that show a strong match to the job.



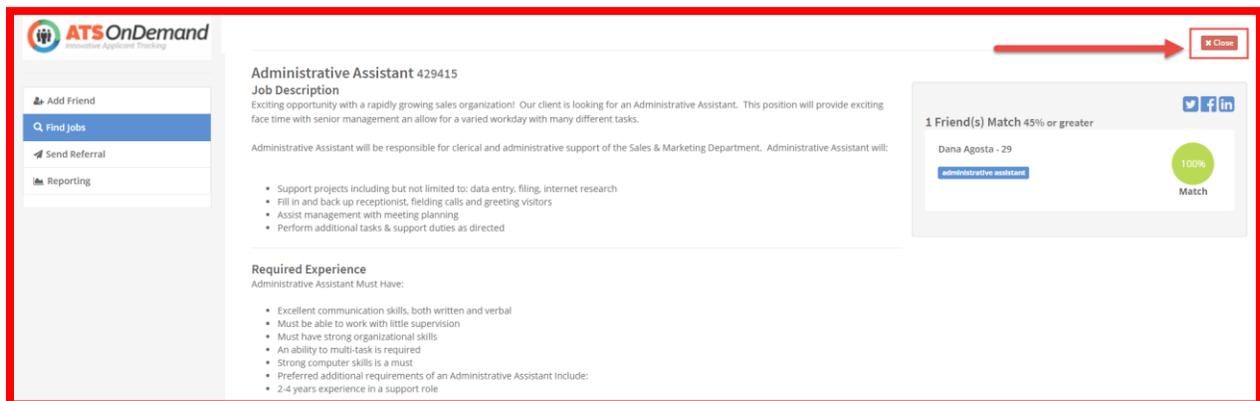
If the user did not have any strong matches, they could share the link to their social media accounts by clicking on the icons.



The user can easily send a referral email to the friend from this page by clicking on the tile and selecting "Refer the above friends."

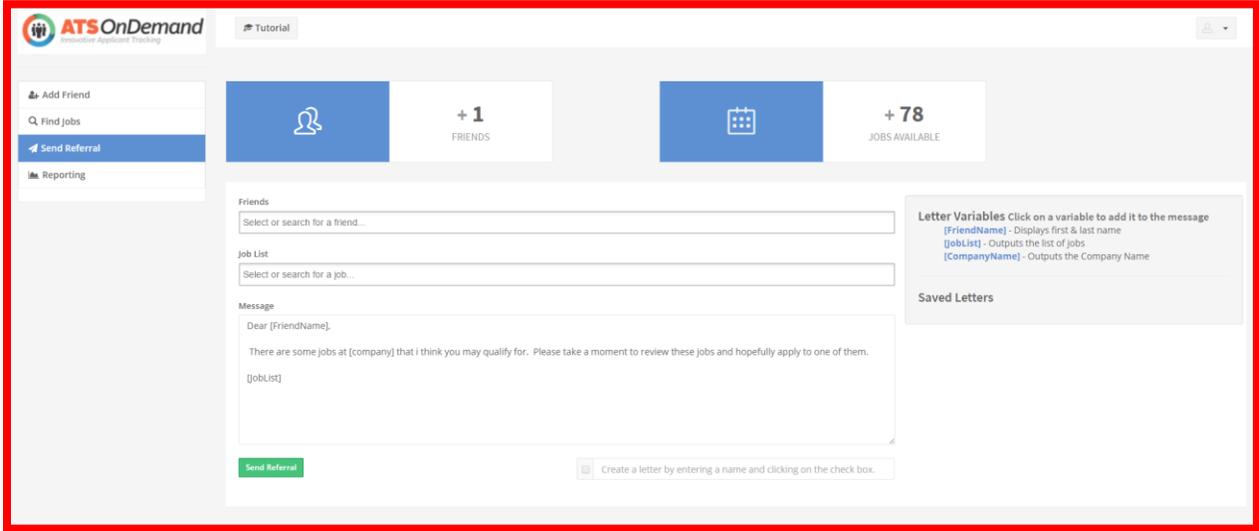


To back out of the job description page and continue reviewing other active jobs, click "Close" in the corner.



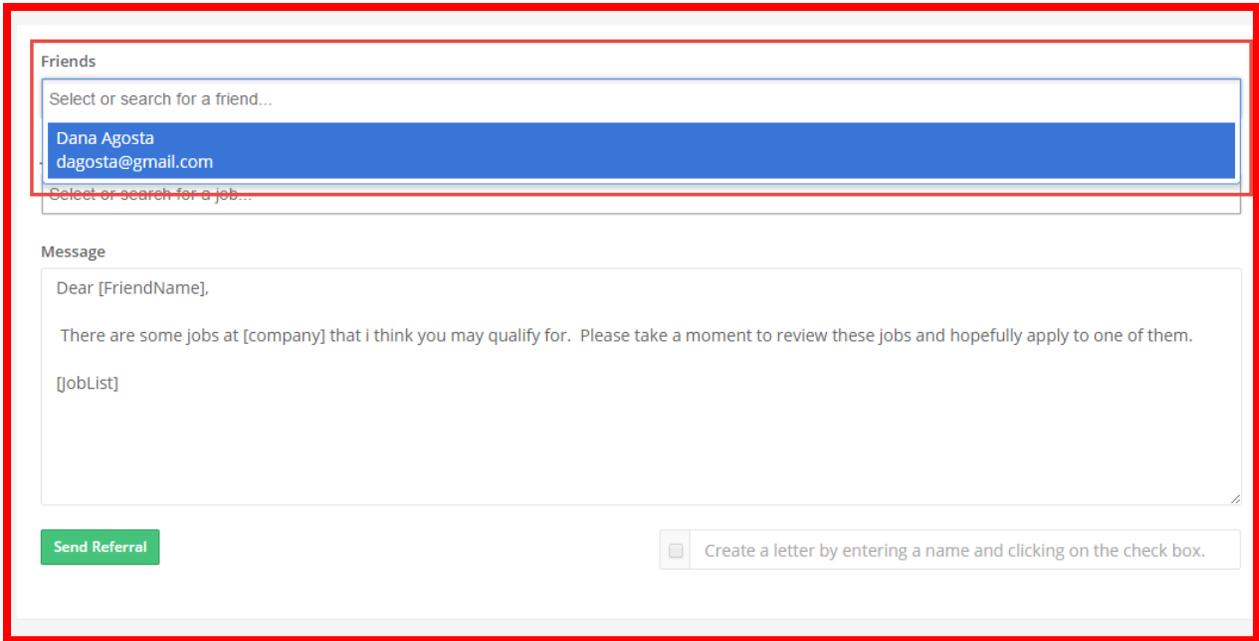
Send Referral

The Send Referral section is where the user can create an email to send to their friend alerting them that there are jobs that they may be a good fit for.



The screenshot shows the 'Send Referral' page in the ATS OnDemand application. The page has a sidebar on the left with navigation options: 'Add Friend', 'Find Jobs', 'Send Referral' (highlighted), and 'Reporting'. The main content area features a top navigation bar with a 'Tutorial' link and a user profile icon. Below this, there are two summary cards: one for 'FRIENDS' showing '+ 1' and another for 'JOBS AVAILABLE' showing '+ 78'. The main section is divided into three input fields: 'Friends' (with a search prompt), 'Job List' (with a search prompt), and 'Message'. The message field contains a pre-filled template: 'Dear [FriendName], There are some jobs at [company] that i think you may qualify for. Please take a moment to review these jobs and hopefully apply to one of them. [JobList]'. To the right of the message field is a 'Letter Variables' section with a legend: '[FriendName] - Displays first & last name', '[JobList] - Outputs the list of jobs', and '[CompanyName] - Outputs the Company Name'. Below the legend is a 'Saved Letters' section. At the bottom of the message field is a green 'Send Referral' button and a checkbox labeled 'Create a letter by entering a name and clicking on the check box.'.

To begin, click into the “Friends” field to generate a drop down of the friends that were added to the system. Select the friend to send a referral. The user can select multiple friends.



This close-up screenshot focuses on the 'Friends' dropdown menu. The dropdown is open, showing a search input field with the text 'Select or search for a friend...'. Below the search field, a single friend is listed: 'Dana Agosta' with the email address 'dagosta@gmail.com'. The friend's name and email are highlighted in blue. Below the friend list is another search input field with the text 'Select or search for a job...'. The rest of the page, including the 'Message' field and the 'Send Referral' button, is visible in the background but slightly out of focus.



Click into the “Job List” field to open a list of the currently active positions. The user can select multiple jobs to send to their friend.

Friends

x Dana Agosta

Job List

Select or search for a job...

- Administrative Assistant
- Program Manager
- Assistant Professor of Athletic Training
- Assistant Project Manager
- Research Associate III
- Inside Sales
- Assistant Project Manager
- Compliance Coordinator

Send Referral

Create a letter by entering a name and clicking on the check box.

There is a default email template that the user can edit at any time. The content in brackets means that it is a variable and will pull that information into the letter template. The user can click on the variables on the right-hand side to add that information.

Friends

x Dana Agosta

Job List

x Administrative Assistant x Social Media Coordinator

Message

Dear [FriendName].

There are some jobs at [company] that I think you may qualify for. Please take a moment to review these jobs and hopefully apply to one of them.

[JobList]

Send Referral

Create a letter by entering a name and clicking on the check box.

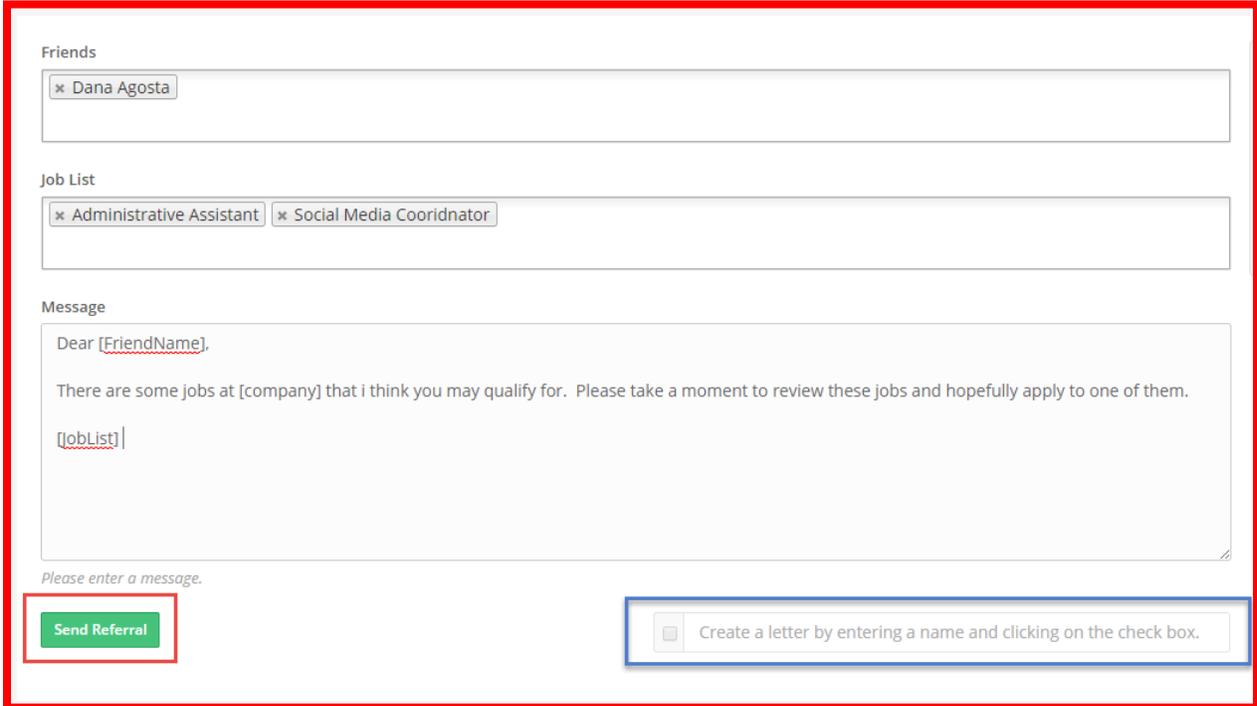
Letter Variables Click on a variable to add it to the message

- [FriendName] - Displays first & last name
- [JobList] - Outputs the list of jobs
- [CompanyName] - Outputs the Company Name

Saved Letters

To send the referral to the friend, click the green “Send Referral” button.

Please note! To save the letter as a template for future use, name the template and check the checkbox prior to sending the referral.



The screenshot shows a web form for sending referrals. It is divided into three main sections: 'Friends', 'Job List', and 'Message'.
1. **Friends**: A text input field containing 'x Dana Agosta'.
2. **Job List**: A text input field containing 'x Administrative Assistant' and 'x Social Media Coordinator'.
3. **Message**: A large text area containing a pre-filled message: 'Dear [FriendName]. There are some jobs at [company] that i think you may qualify for. Please take a moment to review these jobs and hopefully apply to one of them. [JobList]'. Below the text area is the prompt 'Please enter a message.'.
At the bottom of the form, there are two buttons: a green 'Send Referral' button on the left and a checkbox on the right with the text 'Create a letter by entering a name and clicking on the check box.'.

A green icon box will appear in the bottom left hand corner to alert the user that the referral letter has been sent.

