JobDesk CRM

User Manual and Feature Guide — version 3.6.3

The CRM for recruiters built to work offline, with no monthly subscription.

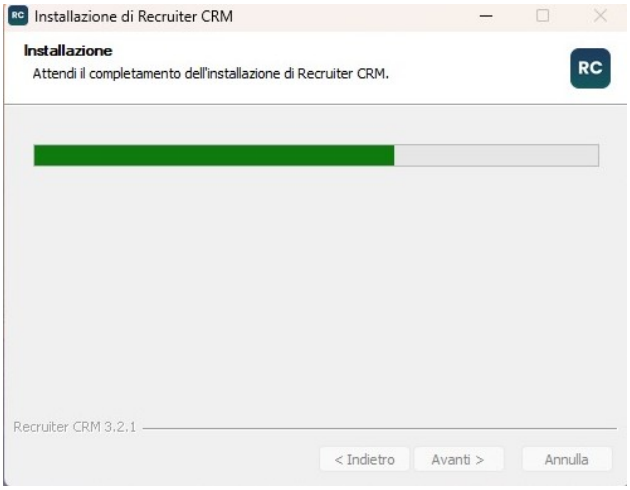
What is JobDesk CRM

JobDesk CRM is a Windows program built for people who handle recruiting and hiring: it manages a candidate's entire journey, from first contact to hire, with no monthly subscription and no need for a constant internet connection. All your data stays on your own PC. (If you still see the name “Recruiter CRM” in the installer file, it is the same program: it has simply been renamed.)

It includes: candidate records with a customizable pipeline, Kanban view, callbacks with reminders, resume upload with automatic data and skill detection, a job match that finds the best-fitting candidates for a position, free-form worksheets with data validation (like Excel), charts, ready-made email templates — including a generator for interview invitations with a clickable meeting link — automatic backups, and updates that download themselves.

Installation

1. Get the installer file (e.g. **Recruiter-CRM-Setup.exe**)
2. Double-click it to start

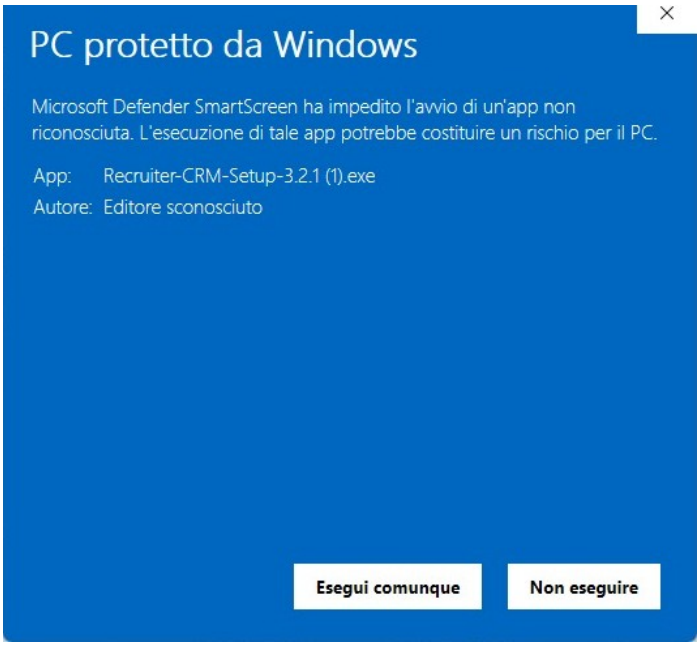


installer window

The Windows blue screen — it's normal, here's what to do

The first time you run the installer, Windows may show a blue screen saying “Windows protected your PC” or “Unknown publisher”. This isn't a virus: it happens because the program doesn't (yet) have a paid digital signature issued by Microsoft — an expensive process that affects many legitimate small-business programs too.

To continue: click “More info”, then the “Run anyway” button that appears right below it. This step is only needed the first time.

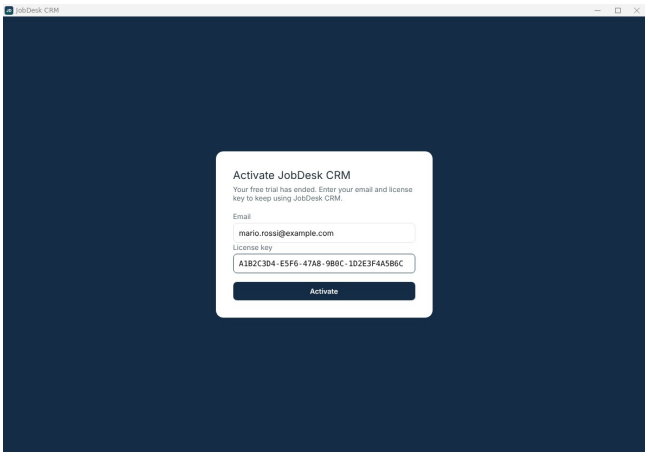


Windows SmartScreen blue screen

3. Follow the installer (you can choose where to install it, or keep the default)
4. Once done, you'll find the icon on the Desktop and in the Start menu

Free trial and activation

The program can be tried for free for 14 days from first launch. A banner at the top reminds you how much of the trial is left. Once it ends, you'll be asked for the license key you received after purchase. At any time, from the “License” item in the side menu, you can see whether the license is active (with activation date and the last characters of the key) or how many trial days are left.

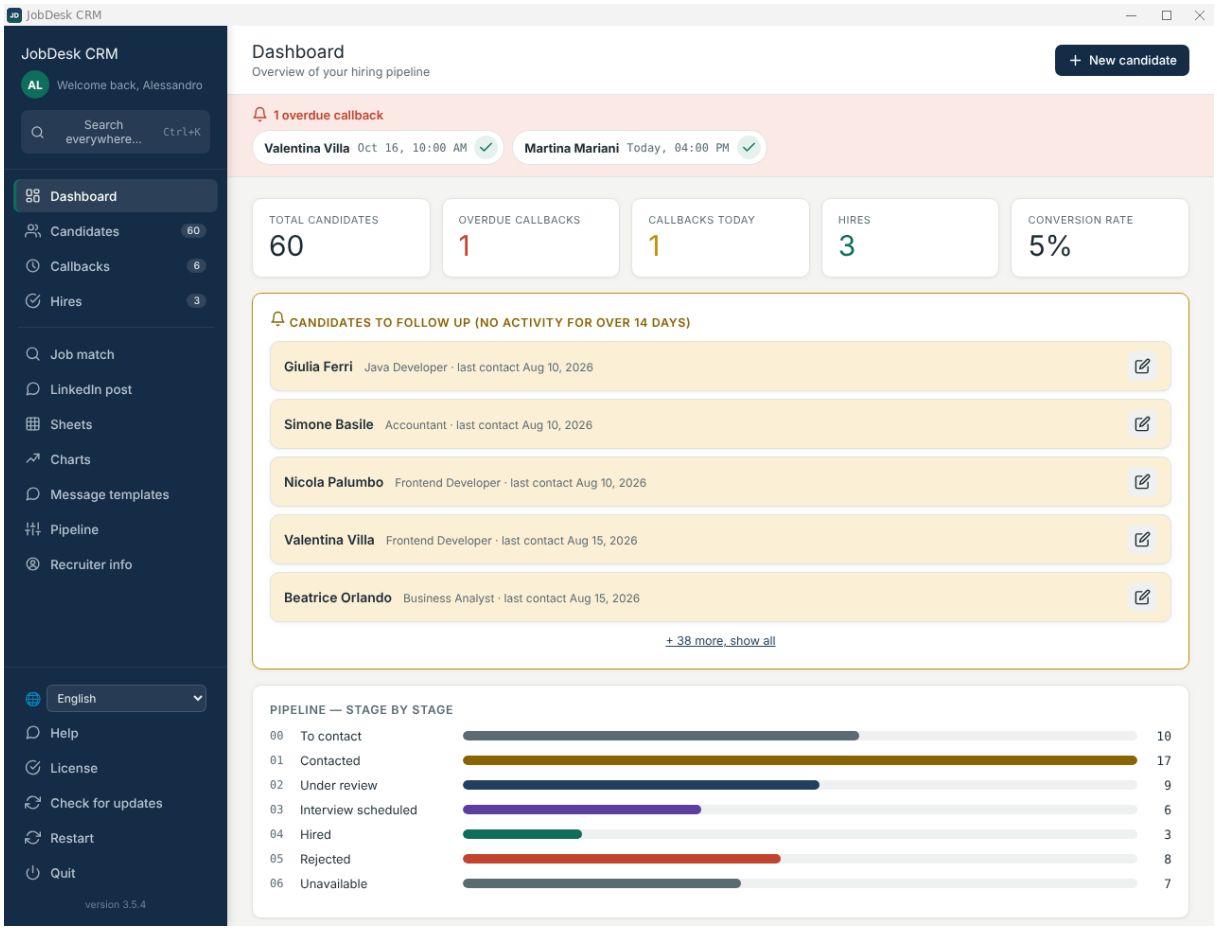


license activation screen

The very first time you open it, before anything else, it's worth going to the **Recruiter info** section and filling in your name, email, phone, company and locations: this information is then used automatically to sign the messages the program generates.

The sections of the program

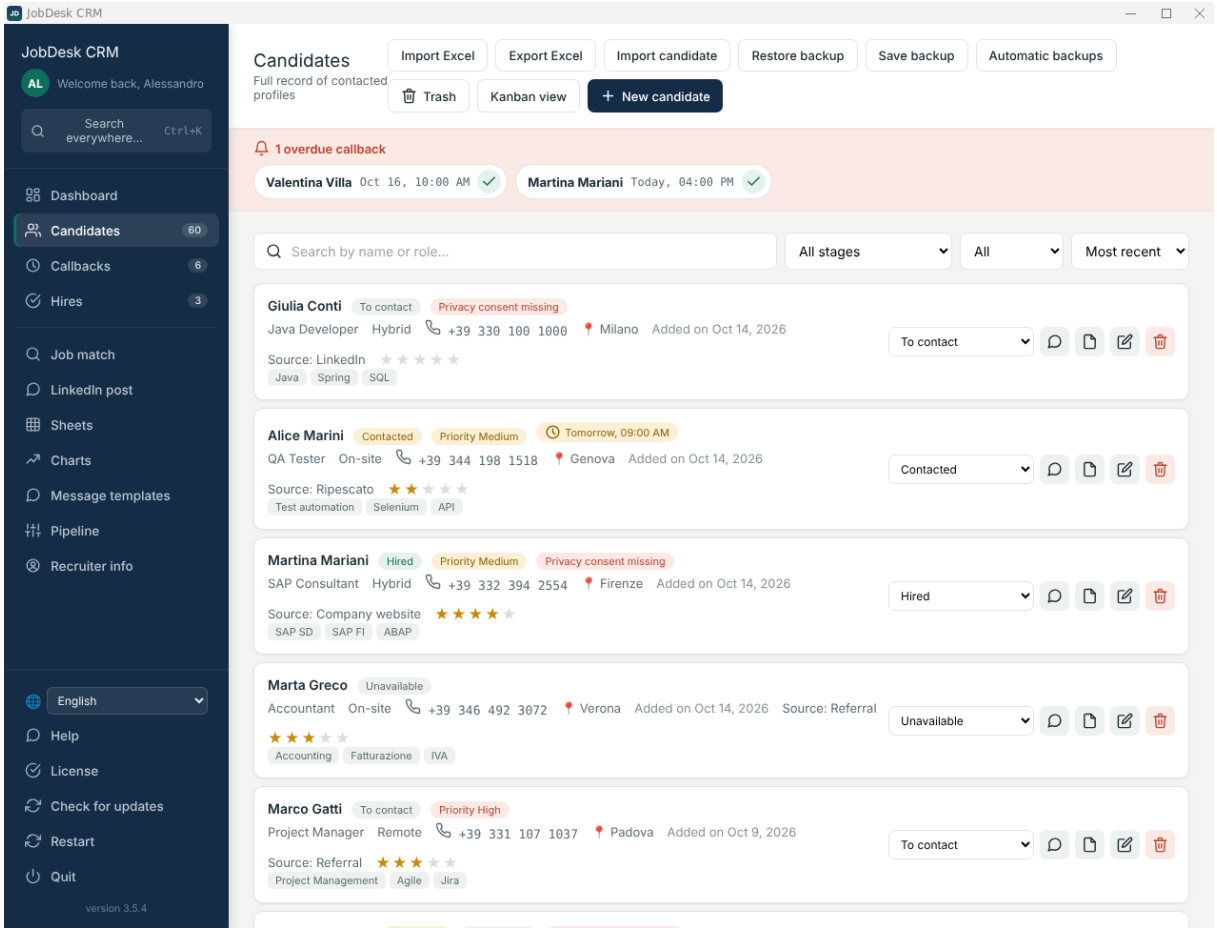
Dashboard



Dashboard section

- Overview at a glance: total candidates, overdue or today's callbacks, hires, conversion rate.
- An alert flags candidates with no activity for over 14 days — click it to see and open them all.
- A bar chart shows how many candidates are in each pipeline stage.

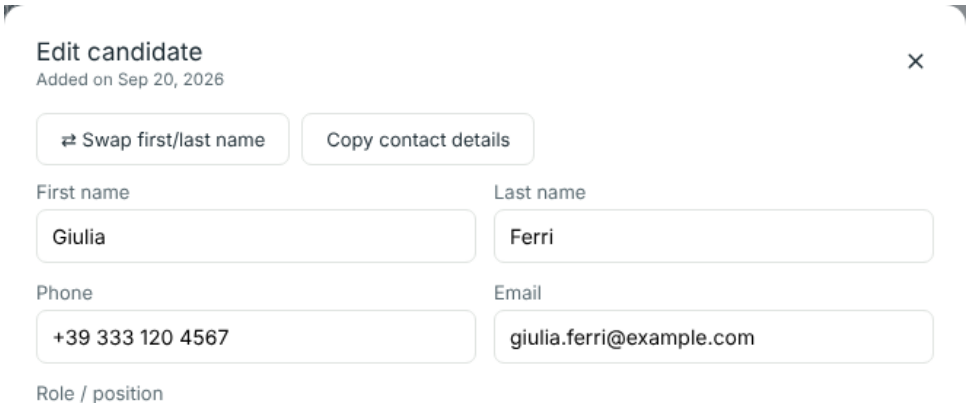
Candidates



Candidates section

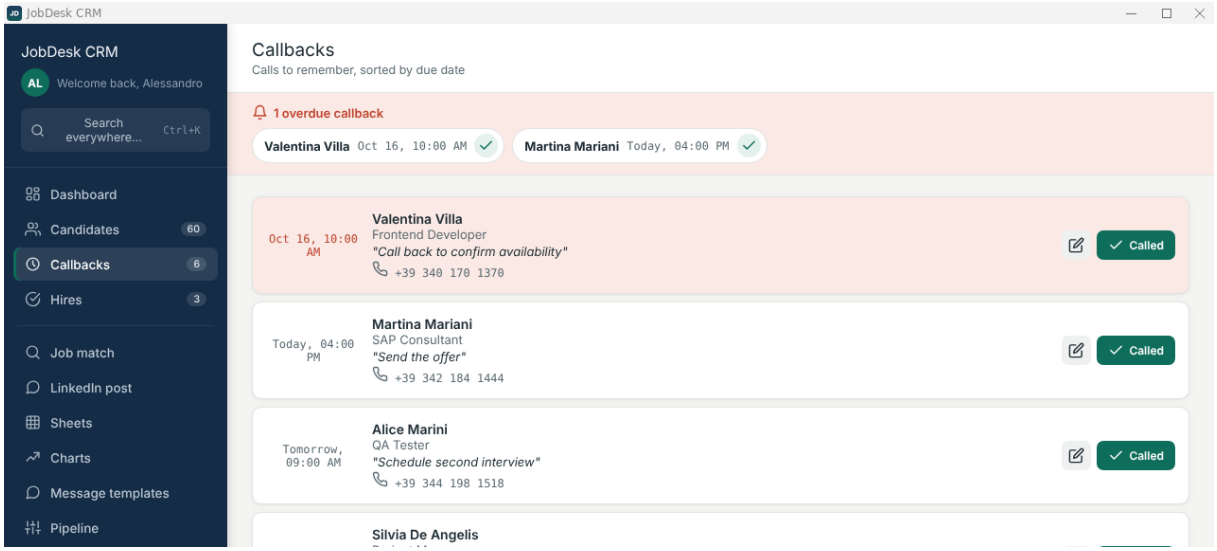
- Full profile: first and last name, phone, email, city, role, availability (Full onsite / Hybrid / Remote).
- Customizable pipeline stage, candidate source, client company (for agency recruiters), star rating, free-form colored tags.
- List or Kanban view, draggable from one stage to another.
- **Kanban view** with an always-visible horizontal scrollbar, and scrolling with the keyboard arrow keys when the view is selected.
- Resume upload (PDF or Word) with **automatic filling**: from the resume the program recognises first name, last name, phone, email, city, role and skills, and pre-fills the empty fields of the record (fields you already filled are never overwritten). Since resumes are not all alike, always check the data before saving.
- **Swap first/last name**: if the first and last name came out reversed from the resume, one click on the button swaps them.
- **Copy contact details**: copies first and last name, city, phone and email in one go — one per line, with a blank line between them and skipping empty fields — ready to paste into an email, a message or another program.
- **Second resume (anonymized version)**: you can also attach a second version of the resume with the candidate's personal details removed, to use when presenting them to a client.

- A free-notes section always at hand, and an activity history dated for every call or update.
- GDPR privacy consent, with a reminder if it's missing.
- **Export to Excel with chosen candidates**: in the export window you can choose “Pick candidates”, search by name and tick only the ones you need, with the “Select all” and “None” buttons.
- Trash: deleted candidates can be restored for 30 days before being permanently removed.
- Excel import and export, filterable by month or year added.
- **Export candidate / Import candidate**: the Export candidate button saves a candidate's entire profile — resumes included — as a separate file, handy for emailing to a colleague who uses the same program. They can then load it back in with the Import candidate button, with no need to re-type anything.



the two buttons at the top of the candidate record

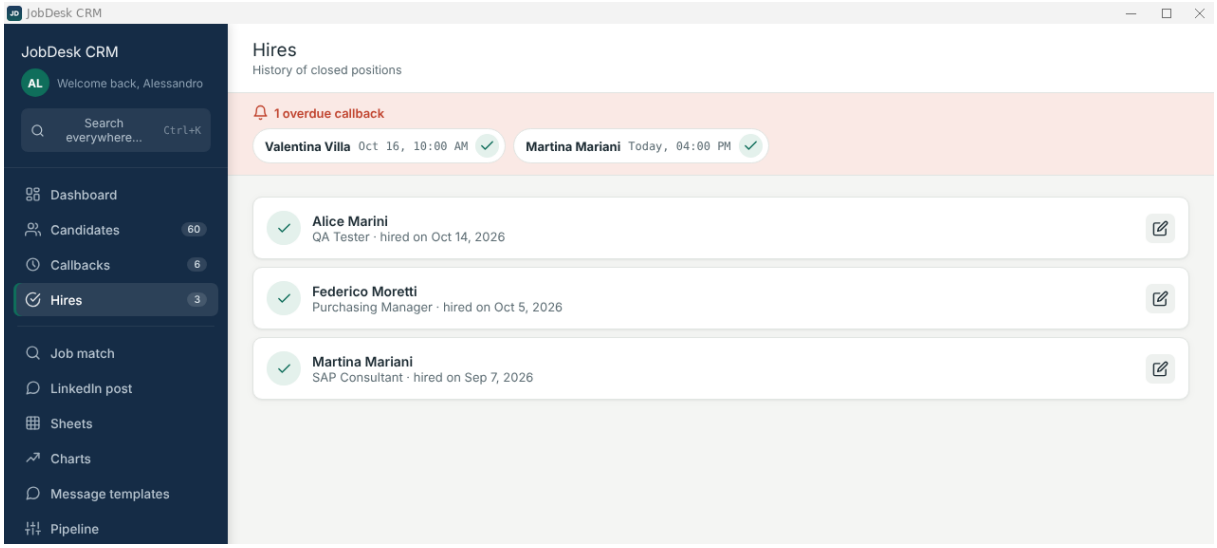
Callbacks



Callbacks section

- A list of calls to make, sorted by due date, with a Windows notification when it's time.

Hires

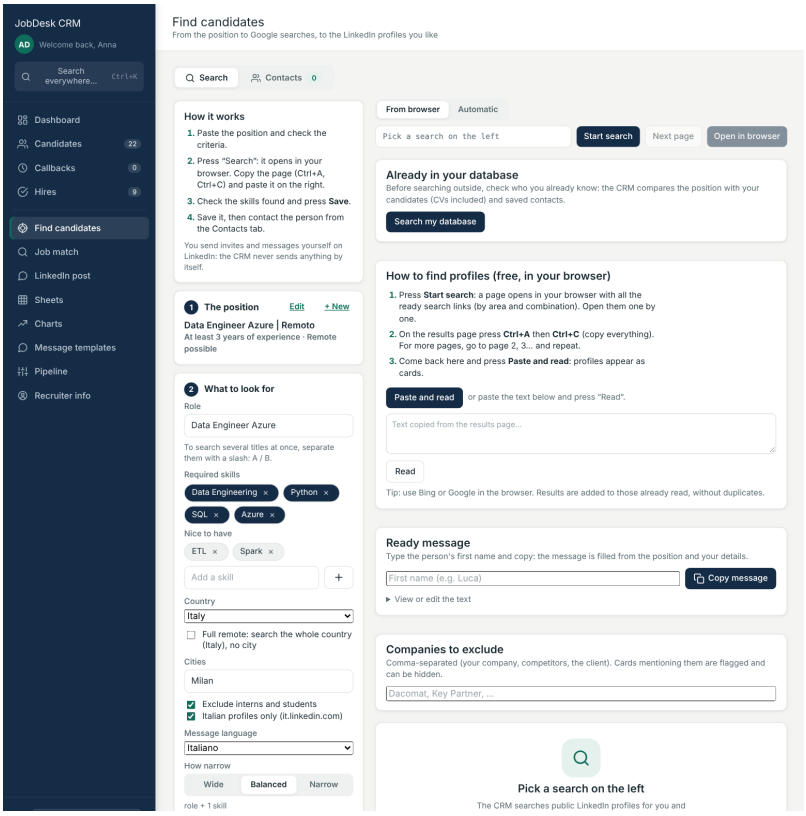


Hires section

- A history of every position successfully closed.

Find candidates

From the position you need to fill to the LinkedIn profiles you are interested in: the program prepares the searches, reads the results and prepares your messages. It works in your browser, with no subscription, and without giving anyone your credentials.

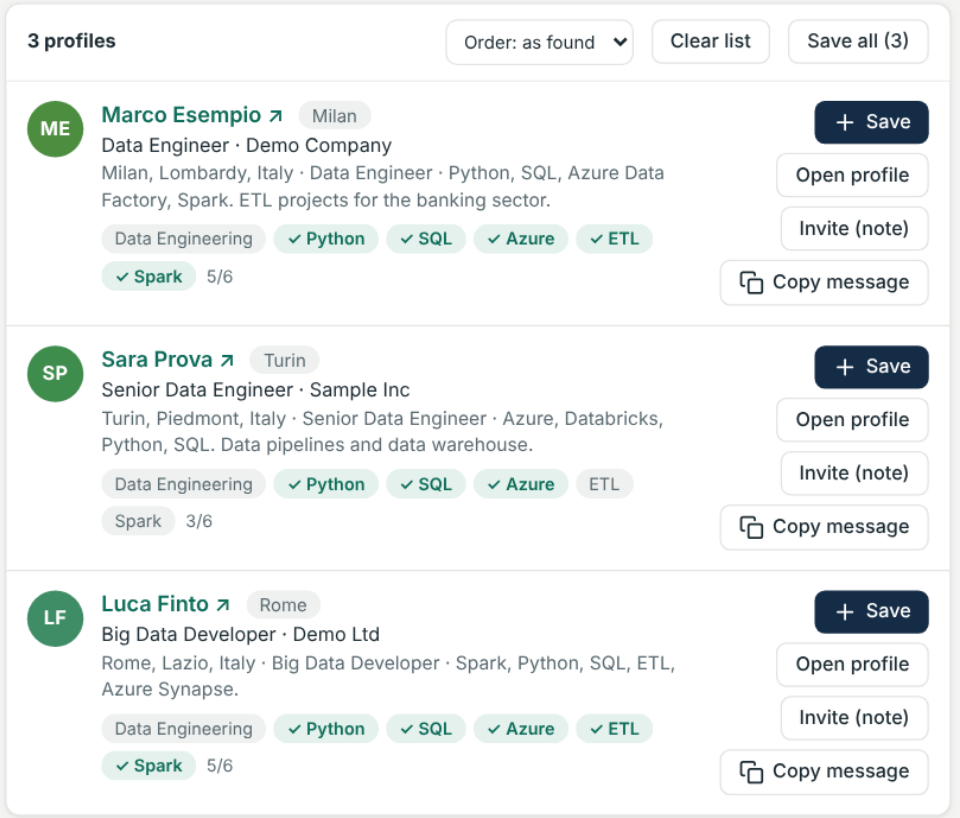


Find candidates section (sample position and candidates)

How to use it, step by step

- **1. The position**: paste the job text (even copied from an email) or upload the PDF or Word file, then press “Analyse position”. The program extracts the role, required skills (dark), nice-to-have skills (light) and years of experience. You can remove a skill with the ×, add more, or change the role.
- **2. What to search**: choose the **Country**, one or more **cities** (separated by commas) or **Full remote** to search the whole country. “Exclude interns and students” removes overly junior profiles; “How narrow” (Wide / Balanced / Narrow) decides how many skills must appear together.
- **3. Start search**: a page opens in your browser with all the ready-made search links (one per city and per skill combination). Open them one by one: you run the searches yourself, with your own browser.
- **4. Paste and read**: on the results page press **Ctrl+A** and then **Ctrl+C** (copy everything), go back to the program and press “Paste and read”. Profiles appear as cards. For more results go to page 2, 3… and repeat: new ones are added, without duplicates.

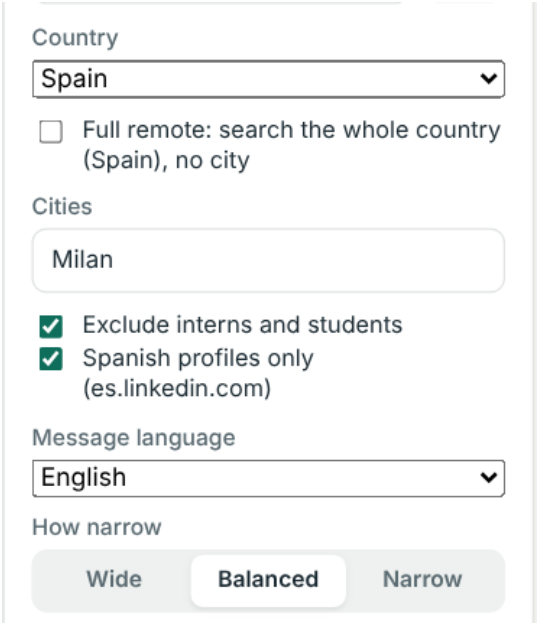
The profile cards



the profiles read, with the skills found (with a tick) and the score

- Each card shows name, role, company, city and the skills of the position that the profile contains (green tick), with a score such as 5/6.
- **Save** moves the person into the “Contacts” tab of the program; **Open profile** opens it on LinkedIn.
- **Invite (note)** and **Copy message**: the program prepares the note to attach to the connection request (within LinkedIn's 300 characters) and the message to send after the person accepts. They are already filled in with the name, the role, the city or full remote and your details from “Recruiter info”. You copy and send them yourself on LinkedIn: the program sends nothing on its own.
- From the saved cards (“Contacts” tab) you can reopen the messages at any time, even after closing the program.
- **Already in your database**: before searching outside, the program compares the position with the candidates and contacts you already have.
- **Companies to exclude**: write your company, competitors or the client (separated by commas): cards where they appear are flagged and, if you want, hidden.
- “View or edit the text” under **Ready message** lets you change the message text; for Italian, the change stays saved.

Country and message language



the Country menu and message language (here: Spain, messages in English)

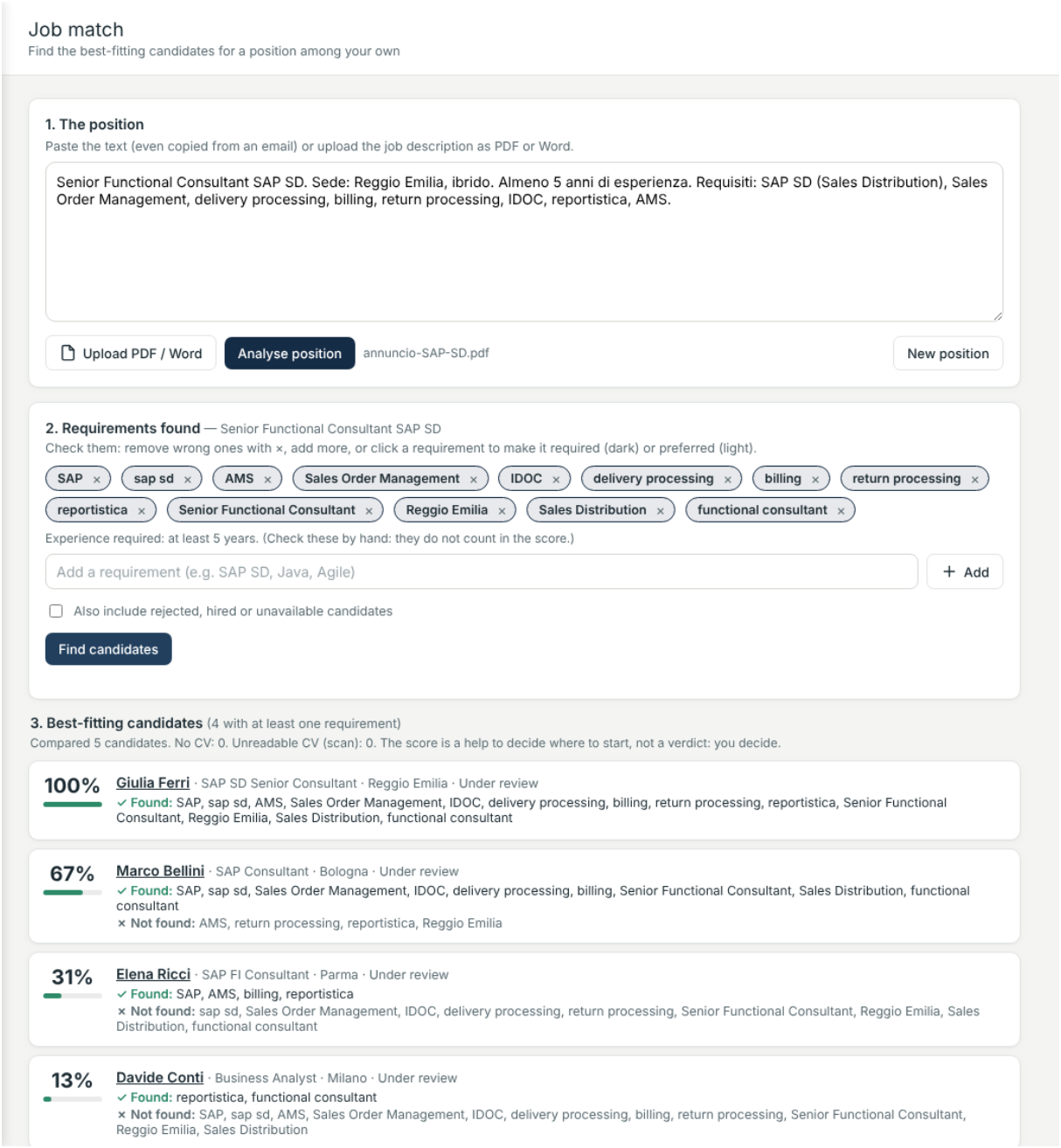
- The **Country** menu lets you search outside Italy too: Spain, France, Germany, Portugal, United Kingdom, Ireland, Netherlands, Belgium, Switzerland, Austria, Poland, Romania, United States, Canada, Brazil, Mexico, Argentina, India, United Arab Emirates, Australia, or **Worldwide**.
- Changing the Country automatically changes the LinkedIn subdomain (for example es.linkedin.com) and the country name in the searches. The "… profiles only" box limits results to that country: untick it, or choose "Worldwide", if a search returns nothing.
- **Message language**: with Italy the messages stay in Italian; with other countries they start in English. You can change it at any time. Custom texts you have saved apply to Italian only.

If you see no results

- In the browser use Bing or Google. If the anti-robot check ("I'm not a robot") appears, complete it in the browser and then copy the page.
- Try "Wide" instead of "Balanced", or remove a required skill: searches that are too narrow give few profiles.
- For searches abroad untick "… profiles only" or choose "Worldwide". Not every country returns results with its own LinkedIn subdomain.
- Results depend on what Google and Bing show at that moment: the program reads what you copy, it does not access LinkedIn.

Fairness and privacy. The program helps you organize searches and messages, but you decide whom to contact, on which platform and on what legal basis (GDPR). Respect LinkedIn's rules: invitations and messages are sent by you, one at a time.

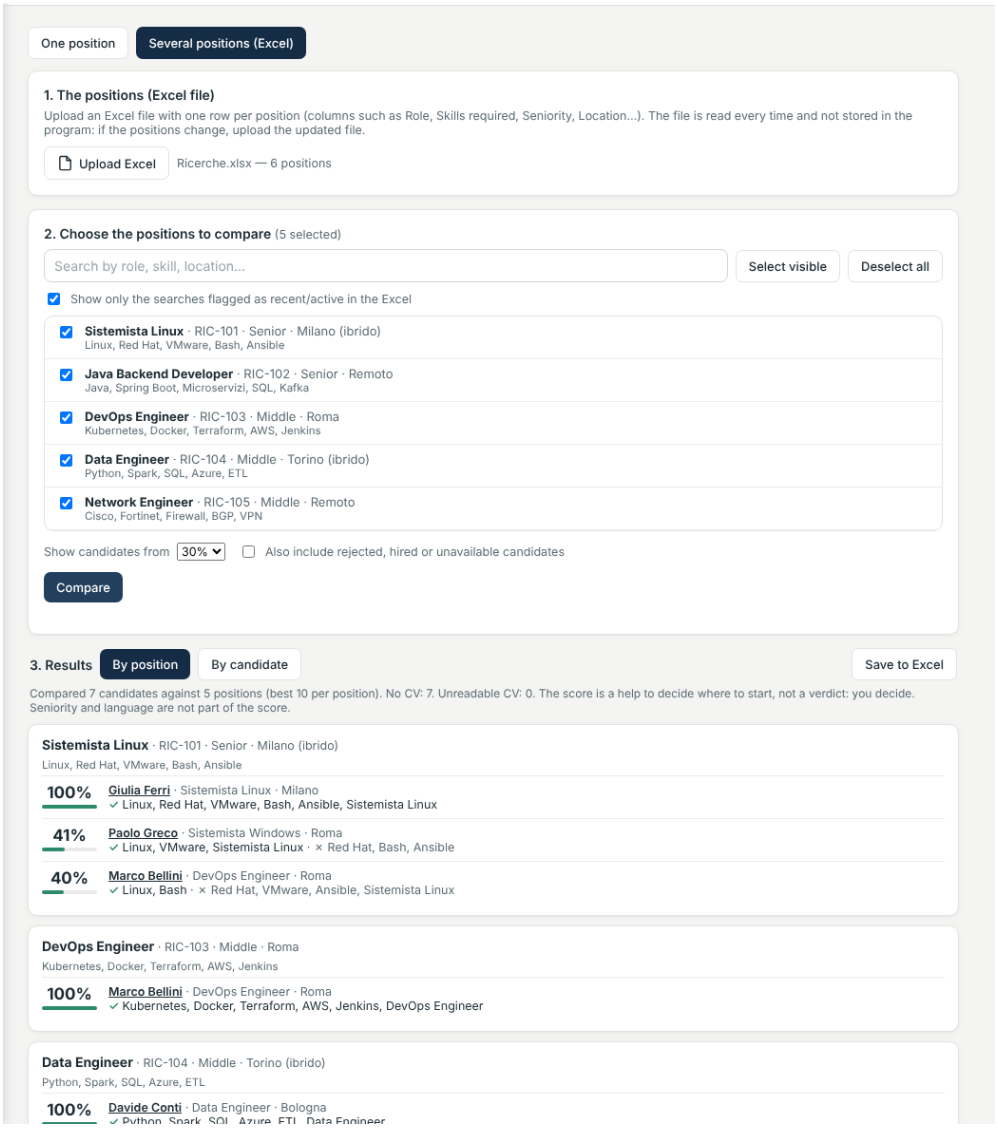
Job match



Job match section (sample candidates)

- Use it to find, among the candidates you already have, the best fit for a new open position (for example “SAP SD” or “PMO”).
- **1. The position**: paste the job description text (even copied from an email) or upload the PDF or Word file, then press “Analyse position”.
- **2. Requirements found**: the program extracts the main requirements by itself and shows them as tags. Remove wrong ones with the ×, add your own, or click a requirement to make it required (dark) or preferred (light).
- **3. Best-fitting candidates**: press “Find candidates”. You get a ranking with a percentage, the requirements found and the missing ones; click a name to open the candidate record.

- By default rejected, hired and unavailable candidates are excluded; tick the box to include them.
- Everything happens on your PC, with no online artificial intelligence and without changing any candidate data. The first time the program reads the resumes (it may take a moment), then it remembers them and later comparisons are fast.
- Candidates with no resume, or with an unreadable one (for example a scan), are scored on role, skills and notes.
- The percentage is an aid to decide where to start, not a verdict: the decision is yours. Required experience (e.g. “at least 5 years”) is shown but must be checked by hand.
- **Several positions from an Excel file**: at the top of this section, the “Several positions (Excel)” button lets you compare your candidates with many positions at once. Upload the file (one row per position, with columns such as Role, Skills required, Seniority, Location and, if you like, a column flagging recent searches), choose the positions — by default the ones flagged as recent — and press “Compare”.
- The file is read every time and is not stored in the program: if the positions change, upload the updated file. For good results write precise terms in the skills column, separated by commas (e.g. “Red Hat, WebSphere Liberty, SSL/TLS”).
- **By position**: for each position the 10 best candidates, with requirements found and missing. **By candidate**: for each candidate the positions where they may fit (with “+ more positions” to see them all). “Save to Excel” exports the result.
- A skill mentioned only once in a long resume weighs less than one mentioned several times. If the candidate's role is of a different type than the position (for example a developer on a systems-administrator position), the score does not go above 70% and a “Score capped” note appears.

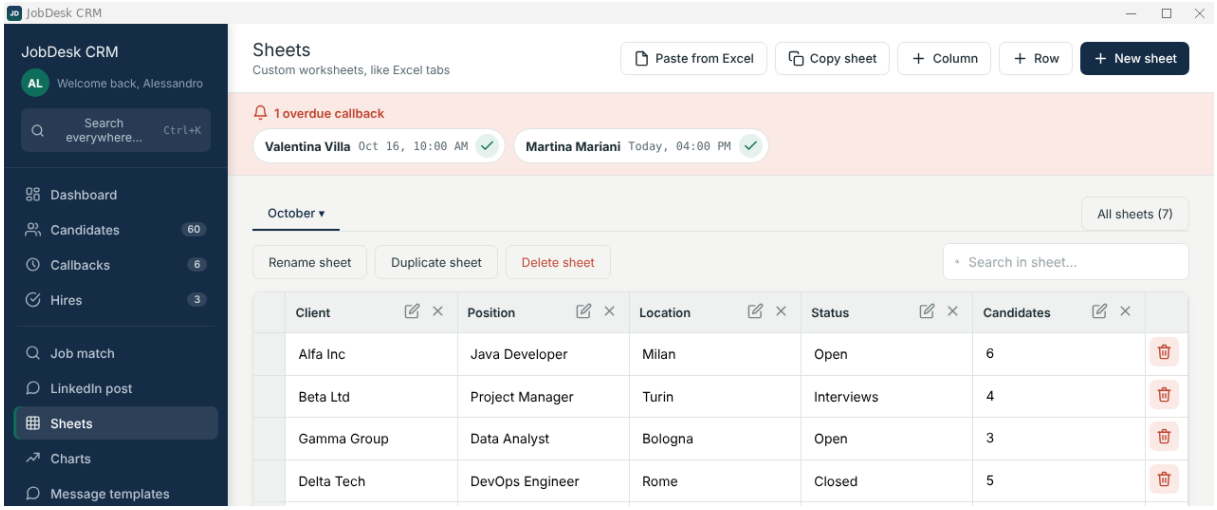


Job match with several positions from Excel (sample positions and candidates)



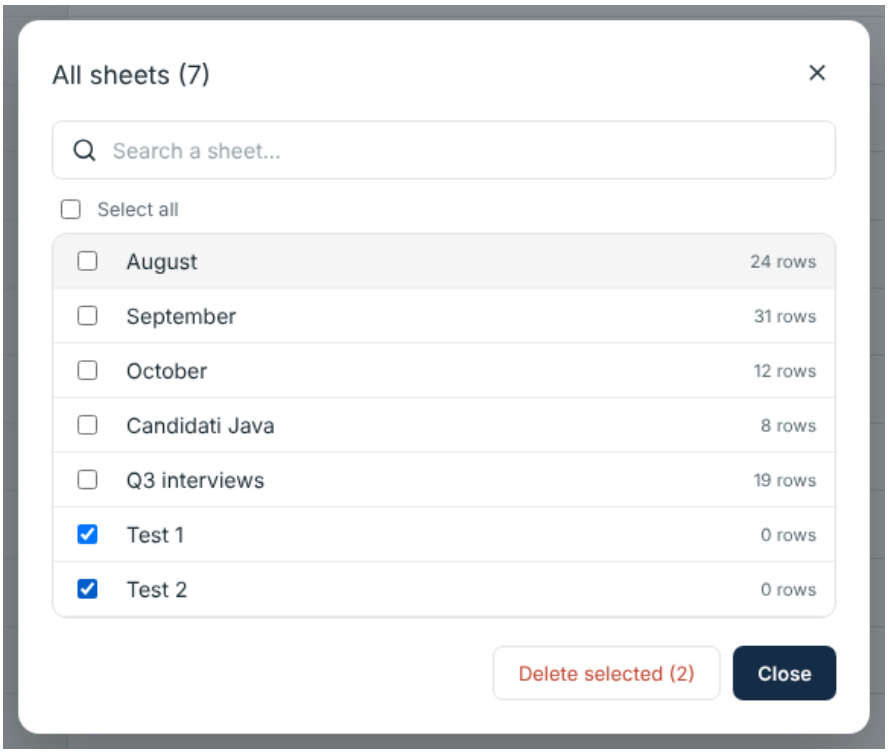
“By candidate” view

Sheets



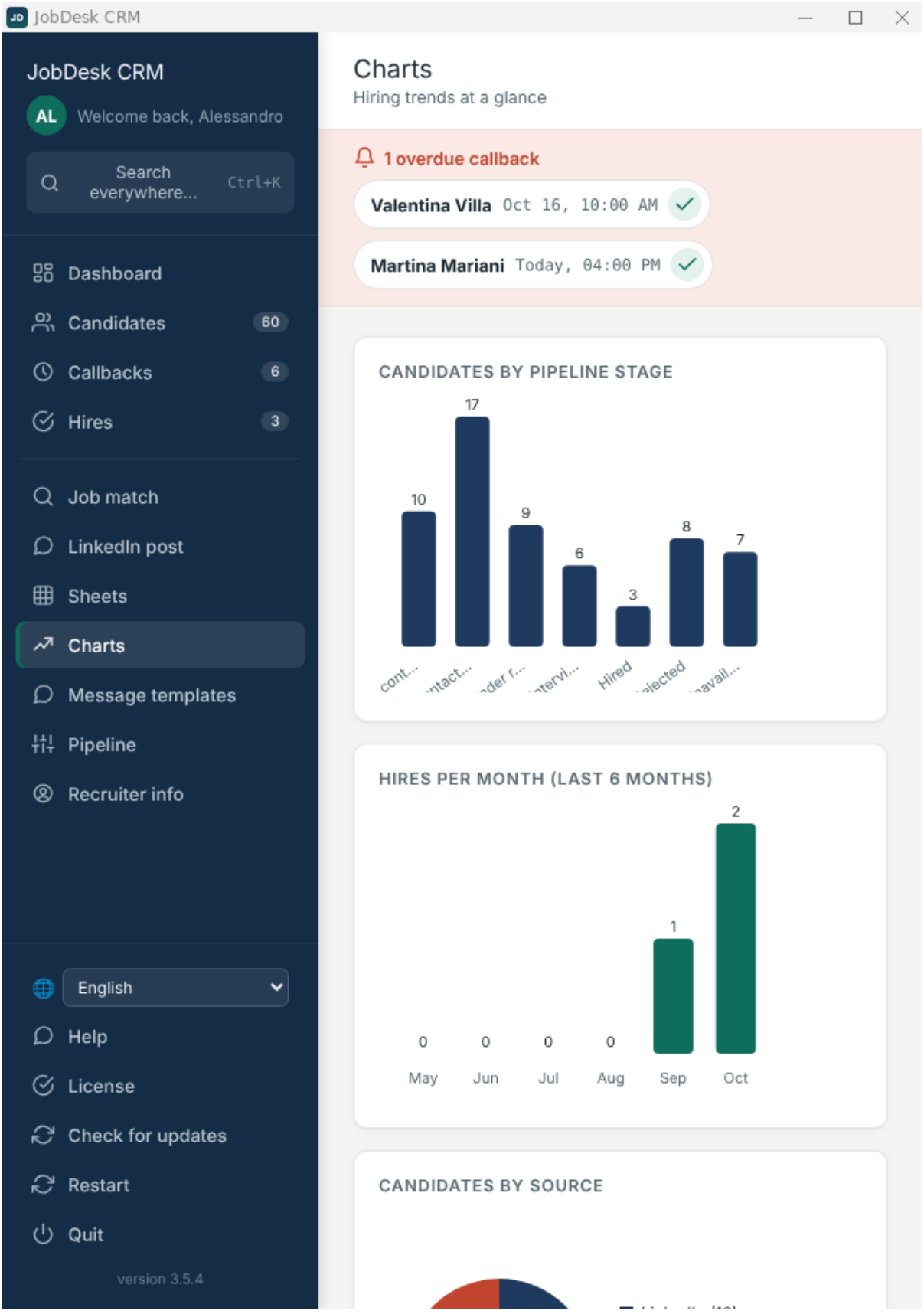
Sheets section

- Free-form, Excel-style worksheets: create a sheet (e.g. “August”), choose how many columns, and give each one a type (Text, Number, Date, or Choice from a list with data validation — exactly like Excel).
- Conditional colors on choice columns, customizable alignment and text wrapping, columns and rows resizable by dragging, just like Excel.
- Real copy/paste with Excel in both directions.
- **Recent-sheets bar** and “All sheets” button: they open the full list, searchable by name, so you no longer scroll through dozens of tabs.
- **Multiple delete**: in the list tick several sheets (or “Select all”) and press “Delete selected”, after a confirmation. Before deleting, the program automatically saves a safety copy of your sheets (the last 15 are kept).



“All sheets” list with multiple selection

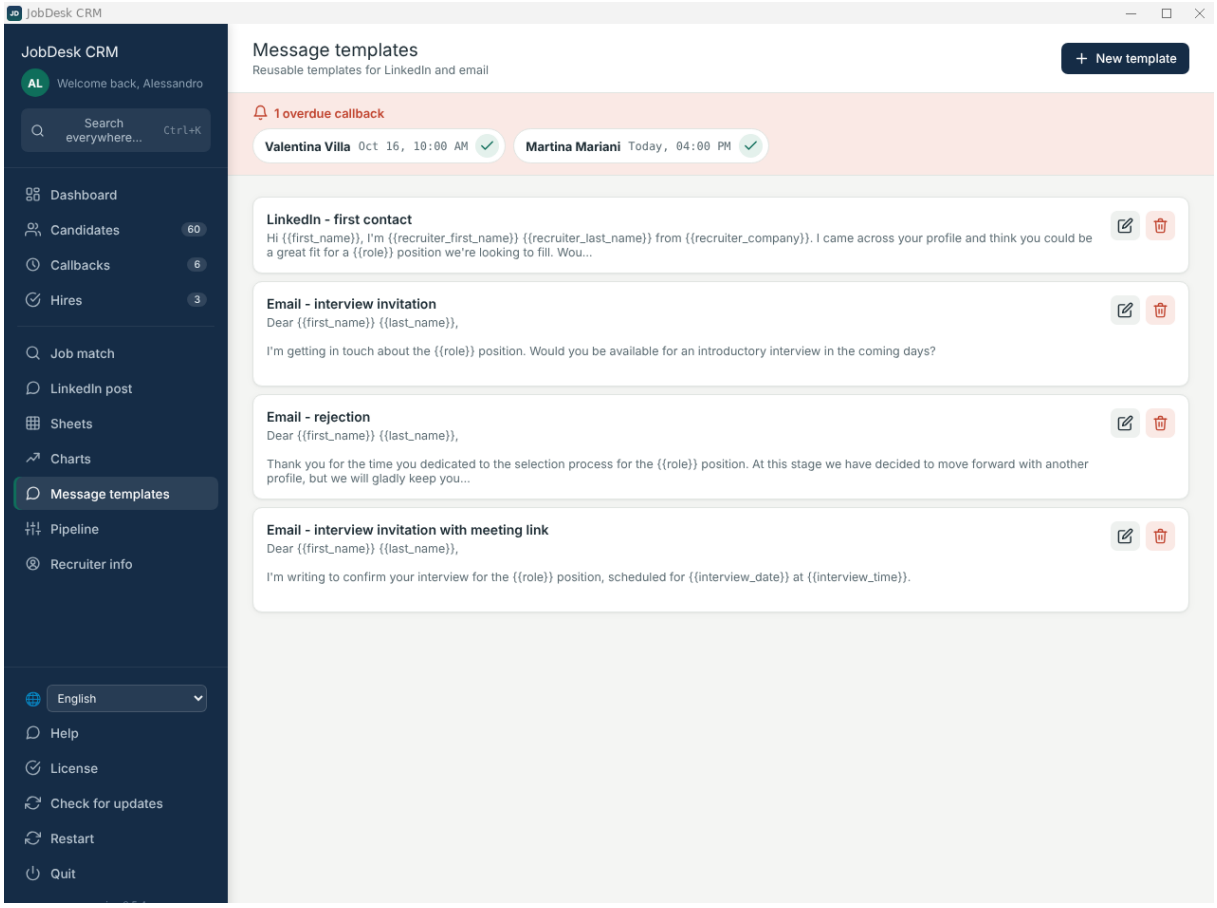
Charts



Charts section

- Candidates by stage, hires per month, and distribution by source — generated automatically from your data.

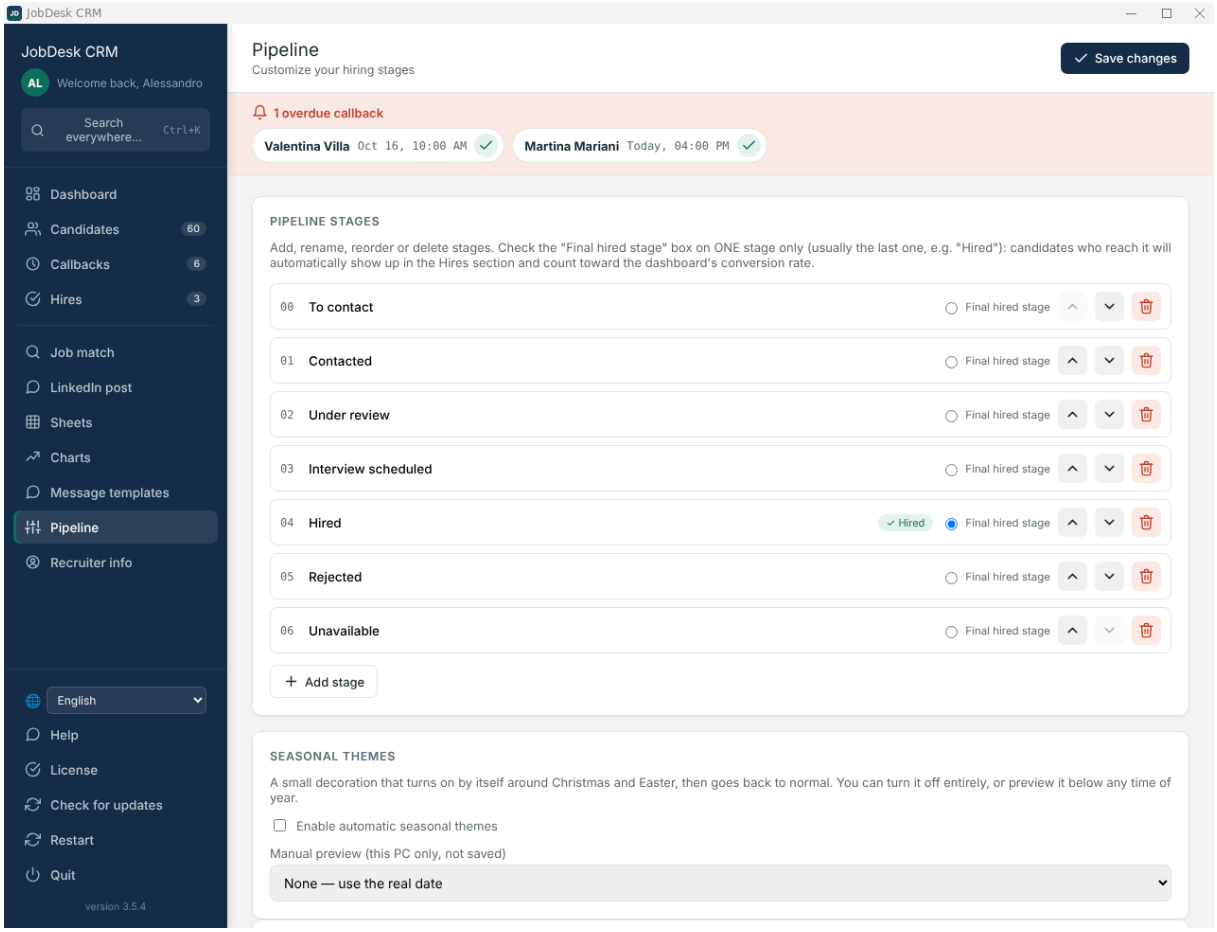
Message templates



Message templates section

- Ready-made message templates (LinkedIn, email) that fill themselves in with the candidate's data and your own recruiter details.
- An interview-invite generator: enter the date, time, meeting link (Teams, Zoom, Meet) and notes — the program prepares the text, with the link staying clickable when pasted into Outlook or Gmail.

Pipeline

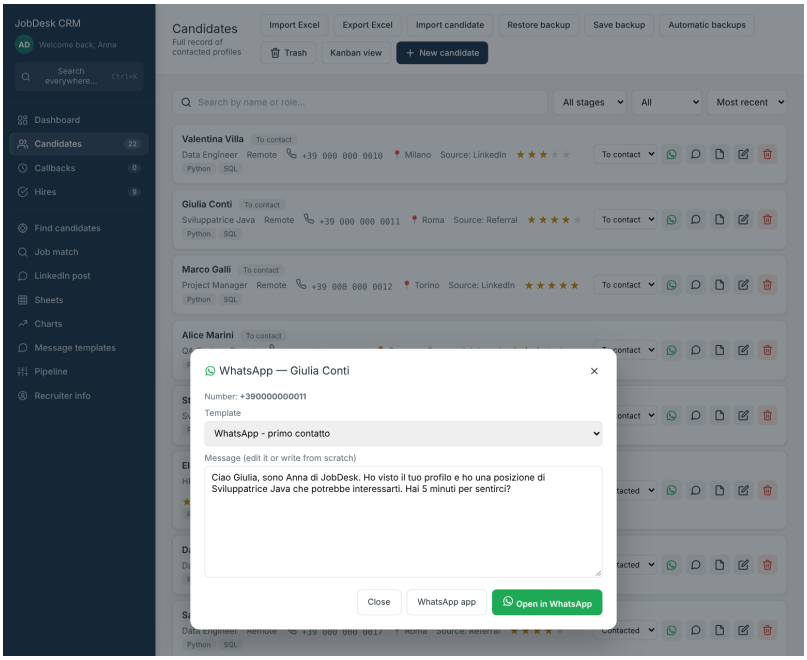


Pipeline section

- Hiring stages are fully customizable: add, rename, reorder or delete stages, no technical setup needed.
- The list of candidate sources is customizable too.
- Optional seasonal themes (a small decoration at Christmas and Easter, can be turned off).

WhatsApp messages

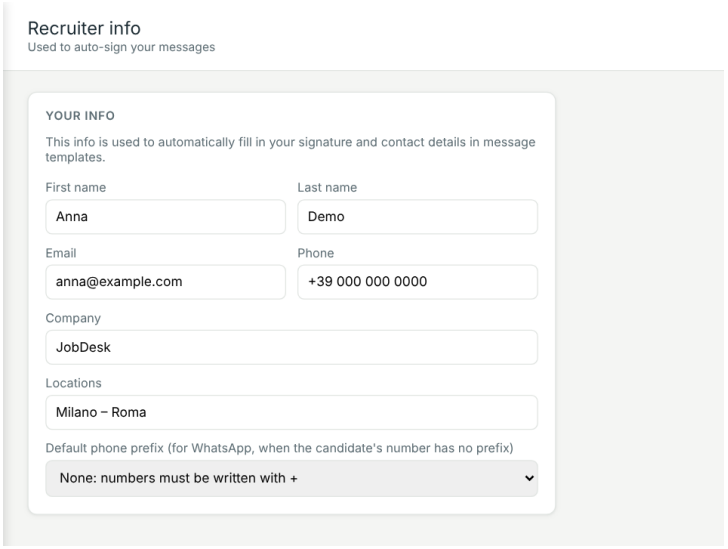
In the Candidates list, next to each person, you find the green WhatsApp icon: it opens the chat with the message already written, with one click.



the WhatsApp window (sample candidate and number)

- **Number**: it is taken from the candidate's record and shown with the prefix (e.g. +39…). If the number is missing or looks wrong a warning appears and the open buttons stay disabled.
- **Template**: choose “No template” to write everything yourself, “Short message (standard)” or one of your templates from “Message templates”. If you have one with “WhatsApp” in its name (for example “WhatsApp - first contact”) it is proposed first. It fills itself in with name, role and your details.
- **The text is always editable**: you can fix it, add a sentence or delete everything and write a free message.
- **Open in WhatsApp** opens the chat in the browser (WhatsApp Web), in a new tab each time. **WhatsApp app** opens instead the WhatsApp program installed on your computer, with no web page: you need the WhatsApp app for Windows.
- The message does not send by itself: in the chat you press Enter. Then, back in the CRM, “Mark as sent” adds the note “Contacted on WhatsApp” to the candidate's history.
- **It works worldwide**: numbers written with + or 00 (e.g. +34 612…) are used as they are. For numbers without a prefix, the **Default phone prefix** is used, which you set in “Recruiter info” (the Italian interface starts with +39, Italy).
- If the candidate has no privacy consent recorded, a reminder appears.

Default phone prefix in “Recruiter info”



the default prefix for WhatsApp, at the bottom of your details

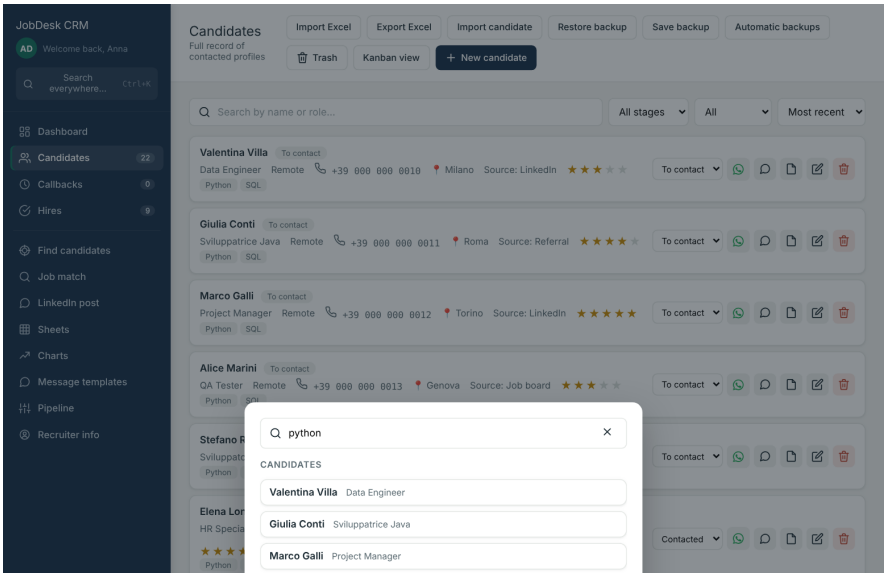
- Choose the country you work from: it is only used for numbers written without a prefix. If you choose “None”, numbers must always be written with + and the prefix.
- For a candidate from another country, just write their number with the +, without changing the settings.

What WhatsApp does not do

- The program does not read candidates' replies and sends nothing by itself: the conversation stays in WhatsApp.
- The candidate must have WhatsApp on that number.
- Writing to someone on WhatsApp follows the same privacy rules as other communications: use the consent recorded in the record.

Search everywhere (Ctrl+K)

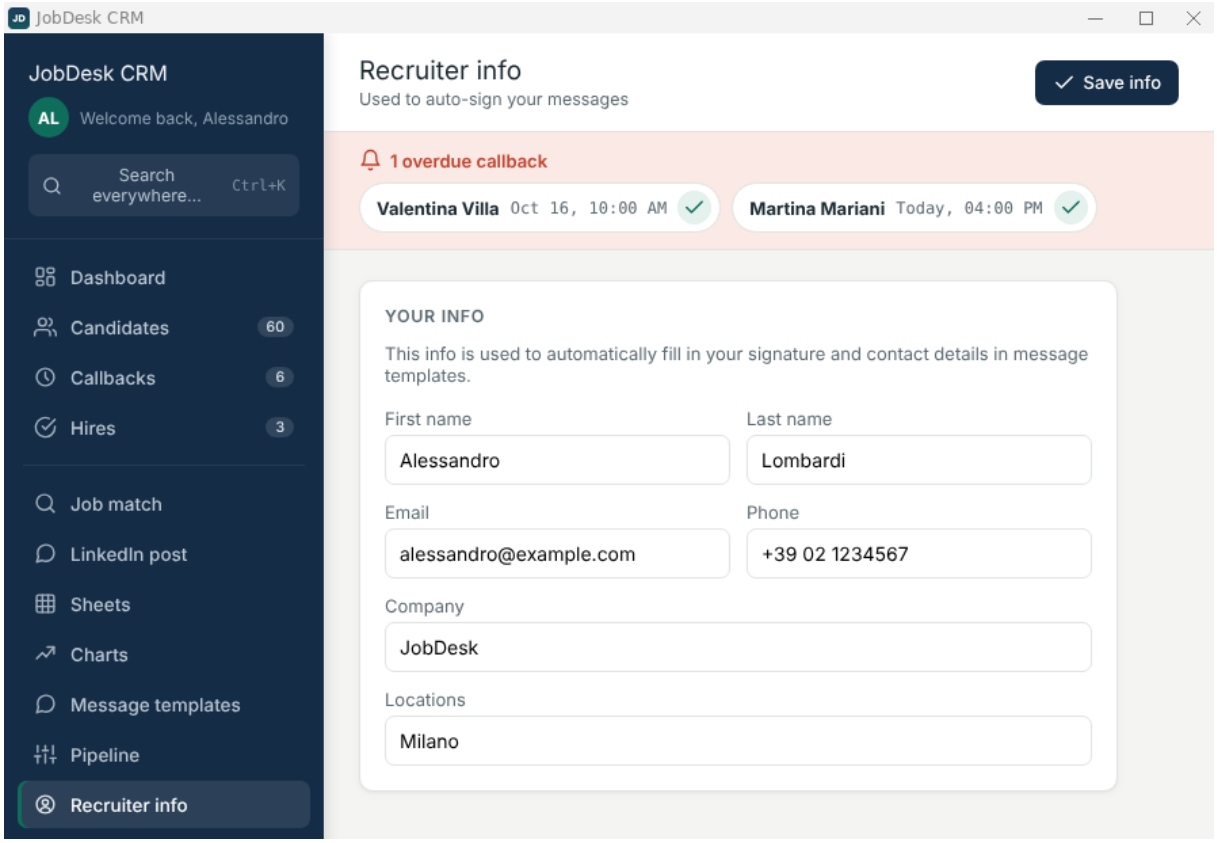
Press **Ctrl+K** from any page of the program (or click the box at the top left) and type: results appear immediately.



the Ctrl+K search (sample candidates)

- It searches candidates by first name, last name, role, tags and skills; sheets by name; templates by name.
- One click on a result directly opens that record, sheet or template.

Recruiter info



Recruiter info section

- Your own contact details, used to automatically sign the messages the program generates.

What's new in the latest versions at a glance

- The program is now called **JobDesk CRM**, like the jobdeskcrm.com website. The installer file and installation window still show the name “Recruiter CRM”: it is the same program, and your data does not change.
- Two new items in the side menu: **Help** (opens the manual, guides and demo on the website) and **License** (shows whether the license is active or how many trial days are left).
- **Export to Excel** with a choice of which candidates to include.
- More convenient **Kanban view**: always-visible scrollbar and keyboard navigation.
- Automatic data filling from the resume, with “Swap first/last name” and “Copy contact details” buttons.
- New **Job match** section to find the best-fitting candidates for a job description, also with **several positions from an Excel file** and a more accurate score.
- More convenient Sheets: recent-sheets bar, full searchable list, deleting several sheets at once, and automatic backup.
- Fully English interface: default stages, sources and skills are translated (ones you renamed stay as you wrote them) and an English set of templates is available.

- Even better data protection: safe saving, and automatic restore from a valid backup if a file turns out to be damaged.

Your data is always safe

Candidates, sheets and settings don't live inside the program itself: they live in a separate folder on your PC. Uninstalling or updating the program never touches it.

On top of that, the program automatically keeps safety copies (at most one every 6 hours, keeping the latest 30), available any time from the “Automatic backups” button in the Candidates section. You can also save or restore a backup manually whenever you like. Saving is “atomic”: a sudden interruption (power cut, forced close) can never leave a half-written file. If a data file turns out to be damaged, the program keeps it aside and automatically restores the latest valid backup. If you are about to save an empty list over a full one, an immediate backup is made first.

Automatic updates

When a new version is released, the program lets you know on its own (or you can click “Check for updates” in the side menu) and offers to download and install it — just like Slack or Discord do — without ever touching the data you've already entered.

App language

At the bottom left of the side menu you can switch the interface language between Italian and English at any time, with no restart needed. Everything is translated: menus, records, messages, dates, and the default stages and sources. Below the language selector you will find the “Help” item, which opens the website page with the manual, guides and demo in your browser.

News in version 3.6

In short, what has been added compared with version 3.5.4. Your data stays where it is: updating the program never touches it.

- **Find candidates** (new section): from the position to searches on Google and Bing, with reading of LinkedIn profiles, per-skill score, ready-made invitation notes and messages, saving to “Contacts”.
- **Country and language** for Find candidates: search in 21 countries or worldwide, with messages in Italian or English.
- **WhatsApp**: a button in the Candidates list with a message from a template or freely written, opening in the browser or in the WhatsApp app, and an automatic note in the history. It works with numbers from any country.
- **Default phone prefix** in “Recruiter info”, used for numbers written without a prefix.
- **Search everywhere** (Ctrl+K): candidates, sheets and templates from a single box.

A five-minute walkthrough

- **1.** Open Find candidates, paste the position and press “Analyse position”.
- **2.** Choose Country and city, then “Start search” and open the links in the browser.
- **3.** Copy the results page (Ctrl+A, Ctrl+C) and press “Paste and read”.
- **4.** Save the profiles you like and use “Invite (note)” and “Copy message” on LinkedIn.
- **5.** When a person sends you the CV, open them in Candidates, upload the CV (the data fills itself in) and write in the notes notice period, expectations and reason for changing.
- **6.** To contact them right away, use the WhatsApp icon.

For questions or support, please get in touch directly.