IT technicians · Zoho One optimization

Zoho Recruit

User and Administrator Manual

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Index — English version

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PART 1 — USER GUIDE

Part 1 — User Guide

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1. Introduction and access

1.1 About this manual

This manual describes the Zoho Recruit features available to users (recruiters, hiring managers, interviewers) and the functions reserved for administrators, as available in September 2026.

Zoho Recruit comes in two versions: Corporate HR, for internal hiring, and Staffing Agency, for firms that recruit for clients. Available features vary by version, edition and your organization's configuration.

1.2 What is Zoho Recruit?

Zoho Recruit is Zoho's applicant tracking system (ATS). It lets you create job openings, publish them on your career site and on job boards, receive and parse resumes, move candidates through a pipeline, schedule interviews, collect evaluations and send job offers. Zia, Zoho's AI, helps find the best candidates for each opening.

1.3 Signing in

1. Go to https://recruit.zoho.com (or https://recruit.zohocloud.ca if your organization is hosted in the Canadian data center).
2. Sign in with your Zoho account or your organization's single sign-on.
3. If you use Zoho One, open the app launcher and select Recruit.
4. Complete multi-factor authentication with Zoho OneAuth if required.

> **Nuagix tip —** Install the Zoho Recruit browser extension: it lets you import a LinkedIn profile or an online resume directly as a candidate.

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2. Interface and navigation

2.1 Main modules

Module	Content
Home	Personal dashboard: today's interviews, tasks, active openings, metrics
Job Openings	Positions to fill, with description, requirements and status
Candidates	Candidate database and their resumes
Interviews	Scheduled and past interviews and evaluations
Assessments	Screening tests and questionnaires
Offers	Job offers prepared, sent and accepted
Clients, Contacts	Agency version: client companies and their contacts
Departments	Corporate HR version: hiring departments
Reports	Recruiting reports and dashboards

2.2 View types

- List: table with columns, filters and custom views
- Kanban: an opening's candidates grouped by pipeline stage
- Record: details, resume, history, notes, attachments and emails
- Interview calendar

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3. Job openings

3.1 Creating a job opening

1. Job Openings > Create (+).
2. Enter the title, department or client, hiring manager and assigned recruiter.
3. Specify the work location (or remote), employment type, number of positions and target date.
4. Write the description, responsibilities and requirements (or ask Zia to suggest one).
5. Add the required skills: they are used for candidate matching.
6. Specify the salary range in CAD, if you display it.
7. Save, then publish to the career site and job boards.

> **Nuagix tip —** In Quebec, write the posting in French and use inclusive wording (e.g., « conseiller ou conseillère », « personne conseillère »): you broaden your applicant pool.

3.2 Job opening statuses

Status	Meaning
In-progress	Recruitment is active
On-Hold	Recruitment temporarily suspended
Filled	All positions have been filled
Cancelled	The position will not be filled
Closed	The opening no longer accepts applications

3.3 Job opening request

Depending on configuration, a manager submits a Job Opening Request that is approved before recruitment opens. The recruiter is then notified and takes over the approved opening.

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4. Candidates and resume parsing

4.1 Adding candidates

Source	Method
Resume received by email	Forward or import the resume: the parser creates the record
Career site	The candidate applies; their record is created automatically
Job boards	Applications received are imported into the opening
LinkedIn and web	Browser extension to import a profile
Bulk import	CSV/XLSX file or ZIP archive of resumes
Referrals	An employee refers a candidate through the portal

4.2 Resume Parser

1. Click Import Resume or drag the file (PDF, DOCX).
2. The parser extracts name, contact details, experience, education and skills.
3. Review and correct the extracted fields.
4. Associate the candidate with one or more openings.
5. Save: the original resume stays attached to the record.

> **Note —** Automatic parsing is never perfect, especially for French resumes with complex layouts. Always review the key fields.

4.3 Managing candidates

- Search by keywords, skills, city or availability
- Duplicate detection and merging (email, phone)
- Tags and lists (e.g., talent pool for future openings)
- Notes, attachments and complete history of exchanges
- Associate an existing candidate with a new opening

> **Nuagix tip —** Always search your candidate database before posting an opening: a finalist from a previous search is often the best starting point.

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5. Hiring pipeline

5.1 Stages and statuses

Stage	Sample statuses
Screening	New, In Review, Qualified, Unqualified
Submission	Submitted to hiring manager or client, Approved, Rejected
Interview	Interview Scheduled, Second Interview, Shortlisted
Offer	Offer Drafted, Offer Sent, Accepted, Declined
Hired	Hired, Onboarding in progress
Rejected	Rejected, with reason

5.2 Moving a candidate forward

1. Open the opening and display the pipeline in Kanban view.
2. Drag the candidate's card to the next stage, or use Change Status.
3. Fill in the requested fields (reason, comment) if a Blueprint process is active.
4. Send the email associated with the new status, if needed.

5.3 Rejecting a candidate respectfully

- Always record the rejection reason for analysis
- Send a courteous rejection email from a template
- Offer to keep their application for other openings, with their consent
- Never leave a candidate without news

> **Nuagix tip —** A fast response time improves your employer brand: set a goal of 5 business days for each stage.

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6. Interviews and assessments

6.1 Scheduling an interview

1. From the candidate record, click Schedule Interview.
2. Choose the type: in person, phone or video (meeting link generated automatically).
3. Select the interviewers; check their availability in the calendar.
4. Attach the interview kit and the evaluation form.
5. Send the invitation to the candidate and interviewers, or let the candidate pick a slot (self-scheduling).

6.2 Interview types

Type	Use
Live interview	Meeting with one or more interviewers
One-way video interview	The candidate records answers to prepared questions
Group interview	Several candidates or several interviewers
Self-scheduling	The candidate picks a slot from available times

6.3 Assessments and evaluation forms

- Screening questionnaires sent before the interview
- Skills tests with automatic scoring, depending on edition
- Interview Feedback form completed by each interviewer
- Common rating scale per skill
- Comparison of evaluations across candidates

> **Nuagix tip —** Use the same evaluation grid for every candidate for an opening: your decisions are fairer, better documented and easier to explain.

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7. Job offers

7.1 Preparing and sending an offer

1. From the selected candidate's record, click Create Offer.
2. Choose the offer letter template.
3. Fill in the salary in CAD, start date, benefits and conditions.
4. Submit the offer for approval, if an approval process is defined.
5. Send the offer to the candidate for acceptance or e-signature with Zoho Sign.
6. Track the status: sent, viewed, accepted or declined.

7.2 After acceptance

- The candidate's status changes to Hired
- The number of filled positions is updated
- The candidate is transferred to Zoho People for onboarding, if onboarding is enabled
- The opening's other candidates are informed

> **Note —** Employment conditions must comply with applicable labour standards. This manual is not legal advice on employment law.

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8. Career site and job boards

8.1 Career site

1. Setup > Career Site.
2. Customize the logo, colours, images and company introduction text.
3. Choose the application form fields and requested documents.
4. Add the privacy notice and the consent checkbox.
5. Publish the page on a subdomain or embed it in your website.

8.2 Publishing to job boards

- Publish in a few clicks to integrated free and paid boards (e.g., Indeed, LinkedIn, Glassdoor), depending on region and edition
- Share openings on social networks
- Track the source of each application
- Update or remove the posting when the position is filled

> **Note —** Available job boards vary by region. For a board that is not integrated, post the ad with your career site's application link to keep source tracking.

8.3 Candidate portal

- The candidate creates an account to track their applications
- They update their profile and resume
- They answer questionnaires and choose interview slots
- They can subscribe to job alerts

> **Nuagix tip —** Test the application journey yourself on a phone: if it takes more than three minutes, simplify the form.

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9. Client and vendor portals (agencies)

9.1 Client portal

- The client submits their needs and creates job requests
- They view the candidates you submit
- They give feedback and approve candidates for interview
- They track the progress of each mandate

9.2 Submitting candidates to a client

1. Open the client's opening and select the qualified candidates.
2. Click Submit to Client.
3. Choose the documents to send (formatted resume, cover letter) and hide contact details if needed.
4. Send by email or through the client portal.
5. Track the client's decision in the pipeline.

> **Nuagix tip —** Hide the candidate's contact details in resumes submitted to clients: you protect both the candidate and your mandate.

9.3 Vendor portal

The Vendor Portal lets partner or subcontractor agencies submit candidates to your openings. You control which openings each vendor can see and track where applications come from.

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10. Emails and templates

10.1 Built-in email

1. Set up your mailbox in Setup > Email (Zoho Mail, Gmail, Outlook or IMAP).
2. Exchanges with candidates and contacts appear on the record.
3. Send an email to a candidate or in bulk from a template.
4. Track opens and replies.

10.2 Useful email templates

Template	When to send
Acknowledgement	As soon as an application is received
Interview invitation	When an interview is scheduled
Interview reminder	The day before the interview
Rejection	When the candidate is not selected
Job offer	Sending the offer letter
Welcome	After the offer is accepted

> **Nuagix tip —** Prepare each template in French and English and use merge fields (first name, position) to personalize your messages automatically.

10.3 Other channels

- Text messages (SMS) to candidates, depending on the configured integration
- Email campaigns to a talent pool
- Internal notifications to hiring managers

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11. Zia and reports

11.1 Zia features

- Candidate Matching: the best profiles in your database for an opening
- Suggested openings for a candidate
- Skill score based on the opening's requirements
- Smart search in plain language
- Drafting job descriptions and emails
- Resume and profile summaries

> **Note —** Zia is a decision aid. The hiring decision must remain human; review the suggestions and avoid relying solely on an automated score.

11.2 Reports and metrics

Metric	Purpose
Time to hire	Time between application and acceptance
Time to fill	Time between opening and closing the position
Application sources	Most effective boards and channels
Hiring funnel	Conversion rates between stages
Recruiter activity	Submissions, interviews and hires per recruiter
Rejection reasons	Reasons for rejections by candidates and by the organization

11.3 Creating a report

1. Reports > Create Report.
2. Choose the module (e.g., Candidates with Job Openings).
3. Select columns, groupings and criteria.
4. Add a chart, save and schedule email delivery.

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12. Mobile app

12.1 Features

- View openings, candidates and their resumes
- Change a candidate's status
- View the interview schedule and join a video interview
- Fill in the evaluation form after the interview
- Call or message a candidate
- Receive approval notifications

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13. Best practices

13.1 Nuagix recommendations

- Search your candidate database before posting an opening
- Keep each candidate's status up to date: it is the basis of your reports
- Reply to every candidate, even when rejecting
- Use common evaluation grids for all interviews
- Record interview notes in Zoho Recruit rather than on paper or by email
- Ask only for the information needed at the current stage
- Write your offers and communications in French for Quebec candidates

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Part 2 — Administrator Guide

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14. Users, roles and profiles

14.1 Key concepts

Element	Controls
Profile	What a user can do: modules, create, edit, delete, export
Administrator	Default profile with access to all features
Standard	Default profile with limited access
Role	Data visible according to the hierarchy (a manager sees their team's data)
Hiring manager and interviewer	Restricted access to the openings and candidates that concern them, depending on configuration

14.2 Adding a user

1. Setup > Users and Control > Users > Add User.
2. Enter the name and email address.
3. Assign the role and profile.
4. The user receives an invitation; they use a license once active.

> **Note —** In Zoho One, first add the user in the Zoho One console and assign them the Recruit app.

14.3 When an employee leaves

1. Transfer their openings, candidates and interviews to another recruiter.
2. Update assignment rules, workflows and approvals that name them.
3. Disconnect their mailbox and integrations.
4. Deactivate the user to free the license.

> **Caution —** Deleting a user without transferring their data can leave candidates without an owner and interrupt ongoing processes.

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15. Organization settings

15.1 General settings

- Company profile, currency (CAD), time zone and language
- Departments (Corporate HR version) or clients (agency version)
- Work locations
- Candidate and job opening statuses
- Rejection reasons and application sources
- Organization email and authenticated sending domain

15.2 Profile and security settings

1. Setup > Security Control > Profiles.
2. Clone the Standard profile to create tailored profiles (e.g., Hiring Manager, Interviewer).
3. Set permissions by module and by field.
4. Restrict export and delete to the profiles that need them.

> **Nuagix tip —** Create a very restricted Interviewer profile: it sees only the candidates it meets and fills in its evaluation, with no access to the rest of the database.

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16. Customization

16.1 Modules, fields and layouts

1. Setup > Customization > Modules and Fields.
2. Choose the module (e.g., Candidates, Job Openings) and the layout.
3. Add useful fields (e.g., Work Permit, Languages Spoken, Availability).
4. Set mandatory fields and permissions by profile.
5. Save and check the effect on the application form.

16.2 Other options

- Email, offer letter and formatted resume templates
- Interview evaluation forms
- Pipeline and statuses specific to each type of opening
- Custom modules
- Application forms per opening
- Branded career site and candidate portal

Caution — Add only the fields you need. Never add a field for age, marital status, ethnic origin or other grounds of discrimination prohibited by the Quebec Charter of human rights and freedoms.

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17. Automation

17.1 Automation tools

Tool	Use
Workflow rules	Trigger actions (email, task, update, webhook) on create, edit or status change
Blueprint	Enforce a step-by-step hiring process with required fields
Assignment rules	Automatically assign applications to a recruiter
Approval processes	Get a job opening request or an offer approved
Auto-responses	Acknowledgement sent to every candidate
Deluge functions	Custom logic and API calls

17.2 Creating a workflow rule

1. Setup > Automation > Workflow Rules > Create Rule.
2. Choose the module and trigger (e.g., candidate status changed).
3. Define the conditions (e.g., status = Interview Scheduled).
4. Add the actions (e.g., email to the candidate, task for the hiring manager).
5. Save and test with a dummy candidate.

> **Nuagix tip —** Automate the acknowledgement and the rejection email first: they are the two messages most often forgotten.

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18. Integrations

18.1 Zoho integrations

Application	Typical use
Zoho People	Move the hired candidate into onboarding and the employee profile
Zoho Workplace (Mail, Calendar)	Email and calendar for recruiters and interviewers
Zoho Meeting	Video interviews with an automatically generated link
Zoho Sign	E-signature of offers
Zoho CRM	Agency version: sync clients and contacts
Zoho Forms	Advanced application forms
Zoho Analytics	Advanced recruiting analytics

18.2 Other integrations

- LinkedIn: extension to import profiles and job posting, depending on available options
- Integrated job boards, depending on region
- Google Calendar, Microsoft 365 and video conferencing tools
- Assessment and background check tools
- Zoho Marketplace: ready-to-install extensions
- REST API (OAuth 2.0) and webhooks

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19. Security, candidate privacy and Law 25

19.1 Privacy settings

1. Setup > Compliance > Data Privacy.
2. Enable consent management and choose how to collect it (career site, email).
3. Write the privacy notice shown to candidates: purposes, recipients, retention period.
4. Set the retention period for unsuccessful applications.
5. Configure consent renewal requests before the period ends.

19.2 Law 25 best practices

- Collect only the information needed for recruitment
- Inform the candidate, at the time of collection, of the purposes and retention period
- Obtain separate consent to keep their application for other openings
- Limit access to applications to the people involved in the recruitment
- Handle candidates' access, correction and deletion requests
- Delete or anonymize applications at the end of the retention period
- Obtain the candidate's consent before checking references or background

> **Note —** This manual is not legal advice. Confirm your obligations with your legal advisor.

19.3 Security

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory
- Access restriction by IP address
- Export restrictions by profile
- Audit Log: history of user actions
- Hosting in the Canadian data center (zohocloud.ca)

> **Nuagix tip —** Schedule a quarterly clean-up of expired applications: it is simple with a view filtered on creation date and status.

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20. Editions and licenses

20.1 Editions

Edition	For whom
Free	Trials and very small hiring volumes
Standard	Small teams: openings, candidates, career site, emails
Professional	Growing teams: automation, portals, assessments
Enterprise	Organizations: Blueprint, Zia, advanced customization, higher limits
Zoho One / People Plus	Recruit included with other apps, depending on the plan

> **Note —** Editions differ between the Corporate HR and Staffing Agency versions. See Zoho's pricing page for current details.

20.2 Tracking usage

Setup > Billing shows the edition, licenses used, resume storage and credits (paid job boards, text messages, API). Remove licenses from deactivated users.

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21. Deployment checklist

21.1 Before going live

- ☐ Company profile, currency (CAD), time zone and departments configured
- ☐ Profiles and roles defined (recruiter, hiring manager, interviewer)
- ☐ Users added and mailboxes connected
- ☐ Fields, statuses and pipeline adapted to your processes
- ☐ Email, offer letter and evaluation templates prepared in French
- ☐ Career site customized and tested on mobile
- ☐ Job boards connected
- ☐ Workflows and approvals tested
- ☐ Privacy notice, consent and retention period (Law 25) configured
- ☐ Integrations (People, Workplace, Meeting, Sign, LinkedIn) configured
- ☐ Existing candidates imported and duplicates cleaned
- ☐ Users trained and documentation delivered

> **Nuagix tip —** Nuagix can support your team with Zoho Recruit setup, integration and training. Book a Zoom meeting: https://nuagix.zohobookings.com/#/andre-martin

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Appendix

A. English-French glossary

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A. English-French glossary

A.1 Interface terms

English (interface)	French
Job Opening	Poste à pourvoir
Candidate	Candidat
Resume Parser	Analyseur de CV
Hiring Pipeline	Pipeline de recrutement
Candidate Status	Statut du candidat
Screening	Présélection
Submit to Client	Soumettre au client
Interview	Entrevue
Interview Feedback	Formulaire d'appréciation
Assessment	Évaluation
Offer	Offre
Career Site	Page carrières
Job Board	Site d'emploi
Client Portal	Portail client
Vendor Portal	Portail fournisseur
Referral	Recommandation
Hiring Manager	Gestionnaire d'embauche
Candidate Matching	Jumelage de candidats
Profile	Profil
Consent	Consentement

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