Driver Recruiter Handbook

ProHRHQ · ATS2 — how to work the pipeline

North Star Group · Updated June 16, 2026

Getting Started

Working a Driver — Start to Finish

This is the path from a name in the system to a placed driver. Every step has a reason; skipping one is where placements get lost.

1. Get a driver Two ways in. Enter a new one through Parse Resume — paste their information or upload a resume PDF, and name yourself as the source on that screen. Or open the pipeline and claim a driver who isn't claimed yet. Claiming is a commitment: the moment you claim a driver, the work of reaching him and seeing it through is yours. Work the referral — that is what earns the commission. A claim you don't work goes back to the open list.

2. Call first, then send the hello Call before you send anything. Introduce yourself plainly: "My name is ___, I'll be your recruiter, and I'd like to send you a couple of things so we can get started." Ask if he'd like to see his application, and whether he'd like to see the job description again. Then send the Hello — I'm Your Recruiter email while you're on the line — it carries his magic link to the application, the job description, and the carrier report, so everything you just talked about is in writing in front of him.

3. Keep it out of spam Stay on the phone after you send. Ask him to look for the email, and if it landed in spam, ask him to unmark it: "It's not spam — we sent it to you with your permission." That one step keeps the mail flowing and keeps us in good standing with the mail providers. Don't skip it.

4. Talk through the job With the email in front of him and out of spam, walk the job. Take his questions. Make sure it actually fits what he wants — home time, pay, the kind of running. Don't force a fit; a driver placed into the wrong job doesn't stay.

5. Not a fit? Hand him the Companion If it isn't right for him, don't lose him. Tell him: "We've got a new tool — an AI chat that helps you find exactly what you're looking for, and we'll help you land a job that matches." Send the Send to Companion email; it carries his magic link straight into the companion. From there the companion does the work with him, and when he's ready it asks him whether he wants a recruiter to reach out.

Logging In — Your Magic Link

What it is Your magic link is a permanent URL that logs you in automatically, with your access level already set. No username or password to remember.

How to use it

- Open the link you were given when your account was created.
- You land directly on the Welcome page — no login form.

- Bookmark it on your phone and on your computer. It does not expire.

If your link stops working Contact your account administrator. A new magic link can be issued from the admin panel.

Navigating the App

Top navigation bar The bar across the top is present on every page. Items from left to right:

- Home — returns to the Welcome dashboard
- List — the full applicant list with search, filter, and sort
- Kanban — your pipeline board, showing every active applicant as a card
- Workbench — work each driver from one screen: notes, follow-ups, stage, and email
- Parse Resume — start a new applicant from pasted text or a resume PDF

Welcome dashboard shortcuts The home page has large cards for New Application, Parse Resume, Active Applicants (Kanban), Workbench, Status, Carriers, Jobs, Carrier Directory, and Companion. The live stats bar at the bottom shows totals for the current account.

Token Lookup — Finding Any Applicant by Token

What it does Every applicant has a unique access token. Token Lookup lets you find a specific applicant record by pasting their token — useful when you receive a magic-link token from an applicant or need to pull a specific record directly.

Where to find it Top nav → (recruiter menu) → Token Lookup

How to use it

- Paste or type the applicant's token into the search field.
- Click Search. If the token matches a record, you go directly to that applicant's detail page.

Working Applicants

Applications List (Status Page)

What it does Shows every applicant in a sortable, searchable table. Each row shows the driver's name, status, carrier assignment, and a Forms indicator that turns green once all required signatures are collected.

Where to find it Top nav → Status

Filters

- Active — current applicants in the pipeline (default view)
- Archived — applicants who have been removed from the active pipeline

Reading the table

- Forms (green) — the applicant has signed their forms electronically. The file is ready to package.
- Forms (gray) — forms are not yet signed.
- Click any row to open the full applicant detail page.

Workbench — Work Every Driver from One Screen

What it does The Workbench is the day-to-day work screen. It puts your whole list of drivers down the left, everything you do with the selected driver in the middle, and a built-in assistant — the Recruiter Helper — down the right, so you can log a call, schedule a follow-up, move stage, send email, and ask how something works without opening each applicant's full page one at a time. Pick a driver on the left, work him in the middle, then move to the next.

Where to find it Top nav → Workbench

Narrowing the list The controls across the top decide who appears in the left column:

- All Carriers — limit the list to one carrier's drivers, then press Apply .
- Assigned to — show everyone, or just the drivers assigned to a given recruiter.
- Search — type a name, email, or phone to jump straight to one person.
- Active / All / Inactive — which drivers are in play.
- Due / overdue, Untouched, Stalled, High priority — quick filters for the drivers that need attention first.

The stage counts The row of numbers across the top shows where your book stands at a glance: New , Application Sent , Application Received , Carrier Acceptance , Employed , and the Total . They update as you move drivers through the stages.

Working the selected driver Click a driver on the left and his card opens on the right with his phone and email at the top. From that one panel you can:

- Add note — log a call, text, or note, then Save note . It lands in Notes & contact history below.
- Schedule follow-up — pick a date and type, then Set , so the driver resurfaces when it's time.
- Move stage — choose the next stage and press Move .
- Email — write a subject and message and Send email without leaving the screen.
- Open full detail — jump to the driver's complete application page when you need more than the Workbench shows. When you're done with one driver, Next → moves you to the next on the list, so you can work straight down your calls without losing your place.

Dictate instead of typing The Add note box and the email Message box each have a microphone ( ). Click it and speak — what you say is typed into the box — then click it again to stop. Useful when you're on the phone or away from a keyboard. Voice input works in Chrome and Edge.

Recruiter Helper — your built-in assistant The pane on the right answers questions about how the work is done. Ask in plain language and it replies from the recruiter handbook and from live carrier and job data:

- Process and documents — "how do I work a driver start to finish?", "what documents does a driver submit?", "what's the claim rule?"
- Carriers and jobs — "describe the Atlantic Cargo job", "what does it pay?", "what jobs does this carrier have?" — it reads the real openings, including pay, home time, and equipment.

It is knowledge-only: it does not read a specific driver's record. To check whether a particular driver has signed, or which forms he still owes, use that driver's screen and the Forms indicator — not the Helper. It's also the fastest way to learn the system — ask it anything about how to run the pipeline.

Application Detail — Full Record

What it does The detail page is everything about one applicant: contact info, application forms, employment history, driving record, documents, notes, and interview questions — all in one place.

Where to find it Status → click any row or Kanban → click a card

Sections on the detail page

- Lead Info — name, phone, email, address
- License — CDL class, state, expiration
- Driving Experience — equipment types and years
- Accident History — DOT-reportable accidents in last 3 years
- Traffic Convictions — violations in last 3 years
- Employment History — previous employers with FMCSA-looked-up contact info

- Education
- Other Qualifications
- Interview Questions — screening checklist you fill out during the call
- Documents — uploaded images (CDL front/back, med card, etc.)
- Notes — internal contact log; dictate or type directly
- Medical Card
- Motor Carrier assignment

Taking notes during a call The Notes panel supports voice dictation. Tap the microphone icon (or use your phone's keyboard dictation) and speak. Notes are timestamped and saved per contact attempt — the Kanban card shows a contact count based on these entries.

Add Applicant — Resume Paste

What it does Paste a driver's resume text and the system creates their record automatically — name, contact info, address, and employment history are parsed and entered. For each previous trucking employer, it also queries the FMCSA database to pull the carrier's address and phone number, pre-filling the Safety Performance History Records form.

Where to find it Top nav → + Add → Add Applicant

How to use it

- Find the driver on Indeed Resumes (resumes.indeed.com) or any other source.
- Select all text on their resume page and copy it.
- Open Add Applicant and paste into the resume text field.
- Click Submit. The system parses the text and creates the record.
- The driver appears on the Kanban board in the New column.

Common issues

- Missing fields — parsing is best-effort. Always open the record afterward and verify name, phone, and email.
- Employment history not found — very small carriers may not be in FMCSA. Enter those manually on the detail page.

Add Applicant — Single Record (Manual Entry)

What it does Creates a new applicant record by entering their name, phone, and email directly — no resume required. Use this when you are on a call and want to create the record immediately without a resume in hand.

Where to find it Top nav → + Add → Quick Add

How to use it

- Enter first name, last name, phone, and email.
- Click Save. The record is created and the driver lands on Kanban in the New column.
- Open their detail page to add employment history, license info, and other data as you collect it.

Archive Applicant

What it does Removes a driver from the active pipeline without deleting their record. Archived applicants are still searchable and their data is preserved.

Where to find it Application Detail → Archive button

When to archive

- Driver declined the position
- Driver did not pass insurance or background check
- Driver is not reachable after multiple attempts
- Driver was hired and the placement is complete

Kanban Pipeline

Kanban Board Overview

What it does The Kanban board shows every active applicant as a card, organized into pipeline stages. You move cards from left to right as the applicant progresses. The board gives you a quick picture of where everything stands without opening individual records.

Where to find it Top nav → Kanban or Home → Active Applicants

Pipeline stages (left to right)

- New — just added, not yet contacted
- Documents — in contact, collecting CDL, med card, and application forms
- Reports — background check, MVR, and drug test in progress
- Ready — all documents received, file is complete and ready to send to the carrier
- Employed — driver has been placed and is working

Reading a card

- Driver's name and contact count (number of notes/call logs recorded)
- Green dot = at least one contact attempt logged
- No dot = no contact attempts yet

Moving Cards Through Stages

Drag and drop Click and hold a card, then drag it into the target column. Release to drop. The change saves automatically — no Save button required.

On mobile Use a long press to pick up a card, then drag to the target column. If drag is difficult on your device, use the move button on the applicant's detail page instead.

Move button (alternative)

- Open the applicant's detail page (click their name on the card).
- Find the Stage selector near the top of the page.
- Select the new stage and save.

Holding a Driver — Claims and the Open List

Claiming a driver An unassigned driver sits in the open list for any recruiter to take. Click the recruiter line on their Kanban card to claim them to yourself — one click, and they're yours to work.

How you hold the claim A claim stays yours as long as you stay in contact. One logged call or text per business day keeps a driver with you. The contact log is how the system knows you're working them.

If a claim lapses Miss a business day with no logged contact and the driver goes back to the open list. You'll see a banner the next time you log in:

Getting the driver back A driver back in the open list is one click to claim again — the same way you took them the first time. The catch: anyone can claim an open driver, so take them again before another recruiter does. If a driver is already assigned to a different recruiter, you can't pull them yourself — that's an admin move, so contact Michael to reassign.

Logging Contact Attempts

Why it matters Every note or call log you add increases the contact count shown on the Kanban card. This lets you see at a glance which drivers have had follow-up and which are sitting untouched.

How to log a contact

- Open the applicant's detail page.
- Scroll to the Notes panel.
- Type or dictate a brief note — even just "left voicemail" counts.
- Save. The count on their Kanban card updates immediately.

Carriers and Jobs

Carriers List

What it does Shows all motor carrier accounts in the system. Each carrier has their own jobs, contacts, and applicant assignments.

Where to find it Home → Carriers or Top nav → Carriers

What you can do from the list

- View carrier name, contact, and status
- Click a carrier to open their detail/edit page
- Add a new carrier (see Add Carrier below)

Add Carrier

What it does Creates a new motor carrier record in the system. Once added, the carrier can be assigned to applicants and can have jobs posted under their account.

Where to find it Carriers → Add Carrier button

Required fields

- Carrier name
- Contact name and phone
- DOT number (if available)

Edit Carrier / Carrier Audit Revert

Editing a carrier Carriers → click carrier name → edit fields → Save All changes are tracked in the carrier's audit log.

Carrier audit revert If a carrier record was changed incorrectly, you can revert a specific audit entry to restore the prior value.

- Open the carrier detail page.
- Click Audit Log to see all changes.
- Find the incorrect change and click Revert on that entry.

Jobs — List and Create

What it does Jobs are position listings under a specific carrier. When you assign a job to an applicant, it records which carrier and which position they are being considered for.

Where to find it Home → Jobs or Top nav → Jobs

Creating a job

- Click Add Job .
- Select the carrier this job belongs to.
- Enter the job title and description.
- Save.

Filtering jobs by carrier Use the carrier dropdown on the Jobs page to show only the jobs for a specific carrier. This is the same filter used internally when assigning a job to a candidate.

Assign Job and Carrier to a Candidate

What it does Links a specific applicant to a specific carrier and/or job. This is how you record which carrier you are placing the driver with.

Where to find it Application Detail → Carrier / Job assignment section

Assigning a carrier

- Open the applicant's detail page.
- Find the Assign Carrier section.
- Select the carrier from the dropdown and save.

Assigning a job

- After assigning a carrier, the job dropdown filters to that carrier's open positions.
- Select the job and save.

Documents and Downloads

Uploading Documents (CDL, Med Card, etc.)

What it does Attaches image or PDF files to an applicant's record. The main documents you collect are the front of their CDL, the back of their CDL, and their medical card. Upload limit is 50MB per file.

Where to find it Application Detail → Documents section → Upload area

How to upload

- Open the applicant's detail page.
- Scroll to the Documents section.
- Drag files onto the upload area, or click the area to browse.
- Files upload immediately — no Save button needed.

Supported file types JPG, PNG, and PDF. Files taken on a phone camera upload fine — most drivers send photos of their documents.

Viewing and Downloading Individual Documents

What it does Opens or downloads a single uploaded document — CDL photo, med card, or any other file attached to the record.

Where to find it Application Detail → Documents section → document row

View vs. Download

- View — opens the file inline in your browser (useful for checking that the image is readable)
- Download — saves the file to your device with the correct extension (.jpg, .png, or .pdf)

Deleting a Document

What it does Permanently removes a document from the applicant's record. Use this when a driver re-sends a clearer image and you need to remove the original blurry one.

Where to find it Application Detail → Documents section → Delete button on document row

ZIP Download — Complete File Package

What it does Downloads all of an applicant's materials as a single ZIP file. The ZIP contains two folders: one for application forms (PDFs) and one for images (CDL photos, med card). File extensions are set correctly — you won't get files with .dat extensions.

Where to find it Application Detail → Download ZIP button or Status page → ZIP icon on the applicant row

ZIP contents

- forms/ — application PDFs (APP, INTRV, FCRA, MVR, PSP, LDACH, SMVR, Safety History Records)
- images/ — CDL front, CDL back, medical card (with correct file extensions)

When to use it After the driver is Ready — forms signed, documents collected, background check clear. Download the ZIP and attach it to your email to the carrier.

Application PDF Download

What it does Generates and downloads the driver's full application as a single PDF — the same content that is in the application forms, rendered for printing or attaching to an email.

Where to find it Application Detail → PDF button

Send vCard

What it does Sends the applicant's contact information as a vCard (.vcf file) — a standard format that any phone or email client can import as a contact. Useful for sharing a driver's contact with a carrier dispatcher or adding them to your own contacts.

Where to find it Application Detail → Send vCard button

How it works

- Click Send vCard.
- Enter the email address to send it to.
- The recipient gets an email with the vCard attached. They can tap the attachment to add the driver to their contacts.

Team and Admin

Sub-Coordinators

What it does Sub-coordinators are team members who have limited recruiter access — they can work applicants but typically have a reduced set of permissions compared to the primary recruiter account. This lets you add team members without giving them full admin control.

Where to find it Top nav → Coordinators

What you can do

- View all sub-coordinator accounts on your team
- Set or reset a coordinator's password

Setting a Coordinator Password

What it does Sets or resets the login password for a sub-coordinator account.

Where to find it Coordinators → coordinator row → Set Password

How to use it

- Open the Coordinators list.
- Click Set Password on the coordinator's row.
- Enter the new password and confirm.
- Save. The coordinator can now log in with the new password.

Activity Log

What it does Shows a timestamped log of recruiter actions taken on a specific applicant — form views, saves, status changes, and other interactions. Useful for tracking what has been done on a file and when.

Where to find it Application Detail → Activity Log

What it shows

- Date and time of each action
- What action was taken (e.g. form viewed, document uploaded, status changed)
- Which user performed the action

Audit Log

What it does A field-level change log for an applicant's record — shows exactly which field was changed, what it was before, and what it is now. More granular than the Activity Log.

Where to find it Application Detail → Audit Log

When to use it When a field looks wrong and you need to know what it was previously, or when two people are working the same file and you need to see who changed what.

Subscription & Billing

What it does Manages the billing subscription for the recruiter account. Access is required to keep the account active.

Where to find it Top nav → Subscribe (visible if subscription management is enabled for your account)