

Candidates – Shortlist Management

Candidates can be assigned to Shortlists for easy retrieval at a later date, for example to send an Email or SMS.

Adding Candidates to a Shortlist

To add a Candidate(s) to a Shortlist:

- Navigate to the Candidates screen in your main navigation menu on the left
- Select the desired Candidates either by:
 - Selecting individually using the checkbox to the left
 - Selecting all Candidates on the screen by clicking the checkbox to the top of the column
 - Using the 'Select All' link to the right of the Filter button at the top of the list – this differs from the above in that you will select all the Candidates, from all the Pages listed
 - Using Advanced Search to filter your list of Candidates
- Select 'Shortlist Management' from the Actions dropdown at the top of the list
- Either:
 - Enter a new Shortlist Name to add the Candidates to, or
 - Select an existing Shortlist to add the Candidates to
 - To replace the entire list just with the Candidates you have selected, make sure to select the Checkbox for this
 - To simply append the Candidates to the list, do not tick the Checkbox
- Click Submit

Your Candidates are now added to the Shortlist you specified.

Viewing Candidate Shortlists

You can now view your Shortlist by clicking the dropdown arrow to the right of Candidates in your main navigation, then clicking 'Shortlist Management'

Click on the name of your saved shortlist to open it.