

Once you've matched Candidates to Vacancies, you can take these candidates through the shortlist process from Contacted to Placed.

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The Shortlist Process

1. Click on the "View Shortlist" button to view the shortlisted candidates – this will take you to the CANDIDATE page & display the shortlist of the vacancy selected.

2. From here, you can click on a candidate's name to assess their profile. Single-clicks on the candidate name allows for fast navigation through this shortlist.

The Shortlist view can be switched to show all the candidates on a single vacancy or all the vacancies for a single candidate (by clicking on Vacancies).

TAG the record if the candidate is a good fit for the role, or click the 2nd tickbox to REJECT the candidate from the shortlist.

2a. TAG: you can assign your own meaning to the TAG tickbox or you can use it to select candidates for sending out emails via the Mail Merge option.

2b. REJECT: this is an internal process – in other words, no-one receives an automatic communication that they've been rejected.

The footer displays the consultant's name who added the candidate to the shortlist, and the date added. Double click to add comments if required.

The screenshot shows the 'Intelligence' software interface. At the top, there's a header for 'ABC Systems' with a logo and navigation icons. Below this is a sidebar with icons for 'New', 'Jobs', 'Di...', and 'Rep...'. The main area has tabs for 'Search', 'Vacancies', and 'Shortlist'. A table lists candidates with columns for 'Tag', 'Cn', 'Int', 'CV', 'Inv', 'Off', and 'Acc'. A modal window titled 'Intelligence' is open, prompting for a comment for a shortlist record, with fields for 'Comments...', 'OK', and 'Cancel'. The footer of the modal shows 'Berni 08 Aug 22 Comments'.

	Tag	Cn	Int	CV	Inv	Off	Acc
Sarah	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nick M	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Intelligence
Enter a comment for this Shortlist record

Comments...

OK
Cancel

Berni 08 Aug 22 Comments

SHOW/HIDE: Rejected candidates are hidden from the shortlist by default, but you can show these hidden candidates by ticking the tickbox to the RIGHT of the Tag header.

The Shortlist Process

3. The Shortlist process is displayed in a grid pattern so that you can quickly see the progress of each candidate on your shortlist.

The screenshot shows a 'Shortlist' tab selected. Below it, the candidate name 'berni sulsters' is listed. To the right of the name are several checkboxes: Tag, Cn, Int, CV, Inv, Off, and Acc. The 'Int' and 'CV' checkboxes are highlighted in red, indicating previous activity.

The **RED highlights** indicate previous activity between the candidate and client. This means that the candidate's CV has been sent to the client for another vacancy, or the candidate has gone for an interview with the client for another vacancy.

4. These tickboxes work you through the shortlist process, where each action is recorded against the candidate profile in Communications.

The screenshot shows a 'Communications' window with a list of messages. The messages are dated 26 Jan 22 and include actions like 'Offer accepted', 'Job Offer', 'Interview successful', 'Interview arranged', 'CV sent', 'Interested in Vacancy', and 'Contacted with regard'.

Date	Candidate	Action	Category
26 Jan 22	Berni	Offer accepted with 3I Group PLC	
26 Jan 22	Berni	Job Offer: 3I Group PLC, Financial Manager	
26 Jan 22	Berni	Interview successful; Company: 3I Group PLC	
26 Jan 22	Berni	Interview arranged with 3I Group PLC at 10:00 on 26	Interview
26 Jan 22	Berni	CV sent to 3I Group PLC Financial Manager	CV
26 Jan 22	Berni	Interested in Vacancy: 3I Group PLC Financial Mana	
26 Jan 22	Berni	Contacted with regard to 3I Group PLC Financial Ma	

TIP: Hover your mouse over the headings to see the meanings of each tickbox.

- Cn - Candidate Contacted
- Int - Candidate Interested,
- CV - CV sent to Client,
- Inv - Interview,
- Off - Offer,
- Acc - Offer Accepted

The Shortlist Process (continued)

5. Each tickbox also prompts you to DO the action

5a. Click on CV tickbox to send the candidate's formatted CV to the client.

The TO: email address will be populated by the email address of the company contact person set from the Vacancy. But you can type in any email address here – just click into the field and copy/paste or type what's needed.

You can type in your Subject and Message and attach the current candidate's Formatted CV.

Do you know that you can add more than one Formatted CV to the email?

Just click on the CV tickbox for another candidate, then attach the document in the same manner.

5b. Click in the Interview tickbox to set up an interview between the candidate & client

Input the date and time as agreed, and edit the location if different from the client's address.

Click on the Interview tickbox anytime you want change the status of the interview, or if it needs to be rescheduled, or set up additional interviews.

5c. Click on Offer and Accepted Offer to record the job offer & candidate's acceptance of the job offer.

Input the offer details, including pay rate, client fee, start date and owning consultant.

Click on Accepted when the candidate accepts the position – Intelligence automatically updates the employment records with this new position and the candidate status to "Placed By Us". Remember to update the candidate's previous employment end date!

Remember to change the Vacancy status to "Filled By Us"!

Shortlist Extras

6. The Shortlist Menu offers extra functions for you to work more efficiently and effectively.

ABC Systems Sales Manager	Tag	Cn	Int	CV	Inv	Off	Acc
Sarah	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nick M	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
berni sulsters	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6a. Filter Results
You can filter the shortlist by any (or none) of the actions taken

6b. Add or Remove the current candidate to/from this shortlist

- Show All
- Show No Actions
- Show Tagged
- Show Contacted
- Show Interested
- Show CVs Sent
- Show Interview
- Show Offer
- Show Accepted

6c. Sequencing Shortlist Result – Keyword

You can sequence the shortlist results by the frequency of a keyword/phrase as it appears in the candidates' CVs.

This means that if there is a specific keyword you are interested in, that could indicate a good/bad candidate, You can look at these people first, as they will appear at the top of the list.

6d. Automatic Assessment using Vacancy Classifications

You can set a scoring system for each vacancy to grade their classifications/answers to questions. Each applicant can be scored and the shortlist can then be sequenced by how well they do.

This means you can automatically reject applicants with low scores and/or work through the shortlist looking at the best candidates first.

6e. Mail Merge to Tagged candidates.

You can send a bulk mail or mail merge to all the Tagged candidates. Please refer to the Cheat Sheet for Bulk Emails for more on this option.

Sequence the Shortlist

Enter a word or phrase and click 'Sequence by Keyword' to sequence the shortlist by the number of times this word occurs in the candidates CV. If no word is entered the shortlist will be sorted alphabetically by the candidates surname.

Click 'Sequence by Vacancy Classification' to sequence the shortlist by a score based on the classification of the Candidate matching the Vacancy Classification'

Sequence by keyword

Sequence by Vacancy Classification