

Quick Start Guide

Progressing Candidates

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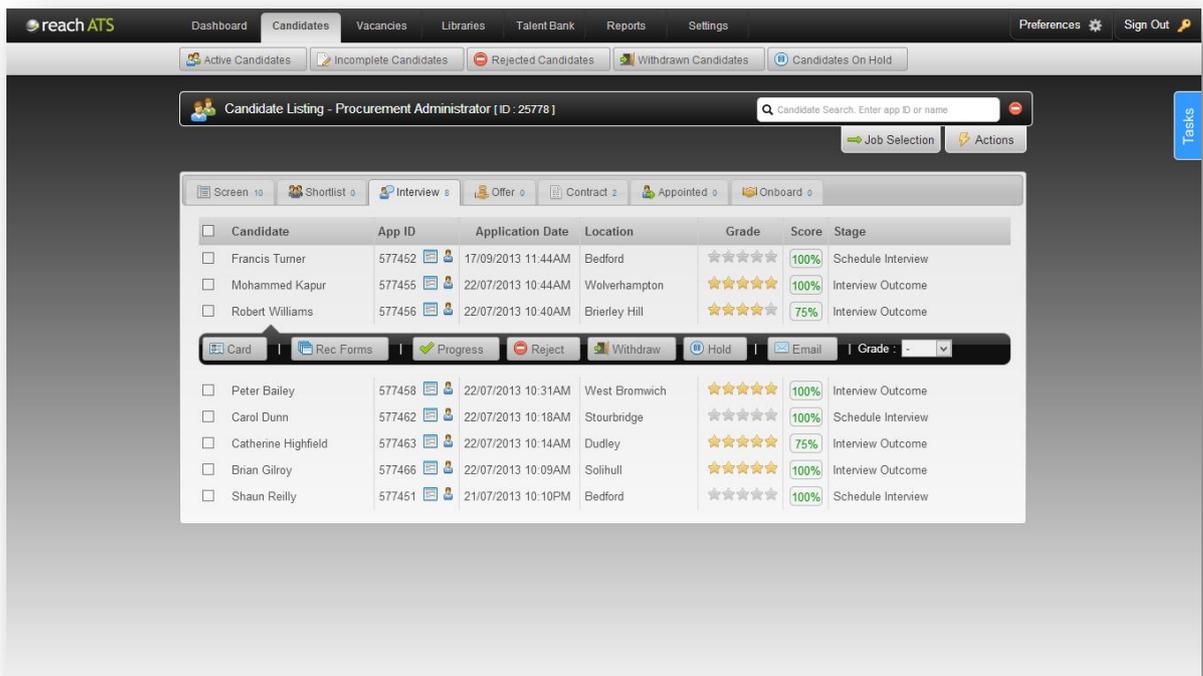


1. Load the candidate list

Access the **Candidates** tab and select the vacancy.

Click onto the relevant tab (e.g. Interview) and click the name of the candidate to be progressed.

Figure 1: Load the candidate list and access the candidate's options bar



2. Progress the candidate

Click **Progress** in the options bar.

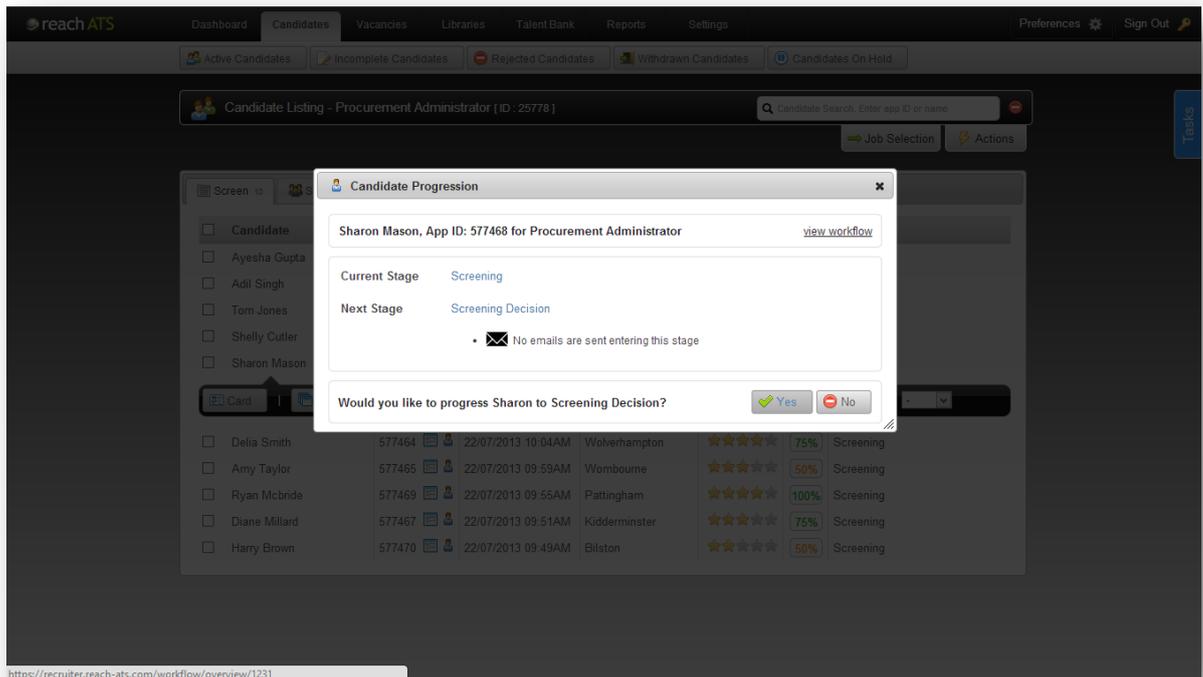
An information panel will appear on screen to confirm the candidate's current stage and the next stage they will reach when you progress their application.

The panel also shows any automated emails that are scheduled to send when the candidate reaches the next stage.

A link to view the workflow is displayed for your convenience.

To progress the candidate's application, click **Yes**.

Figure 2: Progress a candidate's application



The candidate will progress to the next stage of the recruitment process and the candidate listing will be updated instantly.

3. Progress a candidate if a recruiter form is required

Recruiter Forms allow recruiters to input specific details relating to the candidate's application e.g. *interview time & date, salary, start date, hours of work etc.*

Recruiter Forms may be automatically presented for completion based on the workflow stage.

For instance when a candidate reaches the **Schedule Interview** stage, a **Setup Interview Details** recruiter form may be presented to the recruiter to fill in.

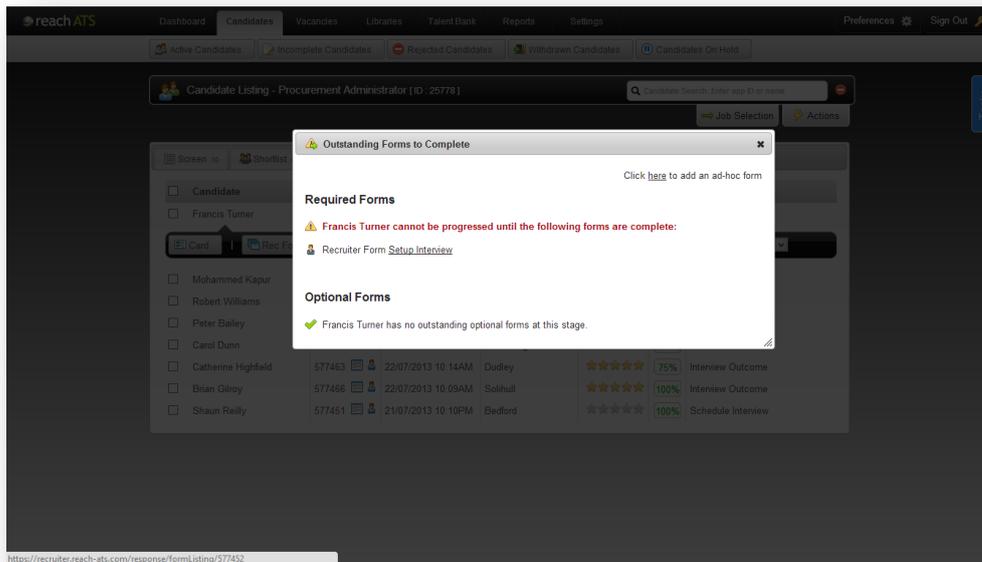
Until the form has been completed, the candidate will not be able to progress to the next stage.

This ensures, for instance, that an *Interview Confirmation* email is not sent to candidates with blank fields where the date, time, venue etc. of the interview should appear.

To complete a flow based recruiter form:

1. Click anywhere on the candidate's details within the listing to access the options bar
2. Click **Rec Forms** or **Progress** (either button opens the same screen)
3. Click the form link in the information panel that opens
4. The relevant form will open in a new tab ready for you to complete

Figure 3: Complete the required form(s) before progressing the candidate



When you have completed the form, you can progress the candidate as normal by clicking **Progress**.

The completed form will be listed in the Forms tab of the Record Card.

4. Progressing Multiple Candidates at the same time

To progress selected candidates at the same time:

1. In the candidate listing, tick the checkbox next to each candidate to action
2. Click the **Actions** tab
3. Click **Progress**

Figure 4: Click Actions to progress multiple candidates

