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

1. The Shortlist Process

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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.

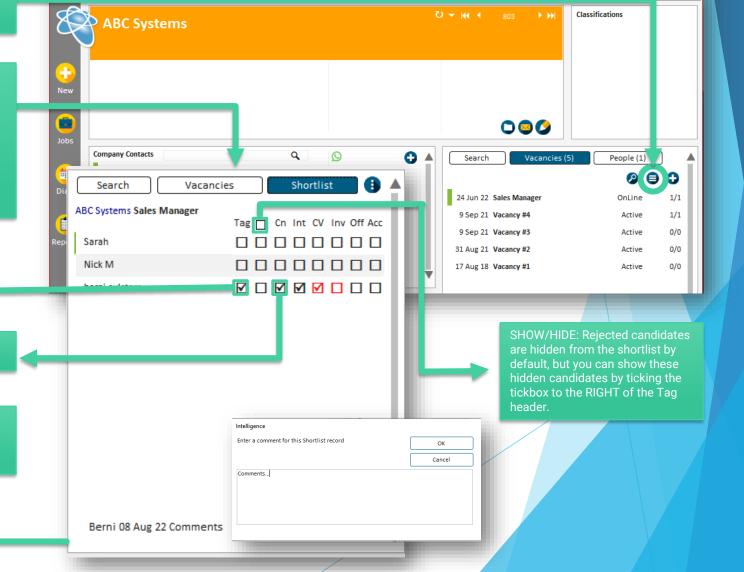
The Shortlist view can be switched to show all the candidates on a single vacancy or all the vacancies for a single candidate (by clicking on Vacancies).

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.



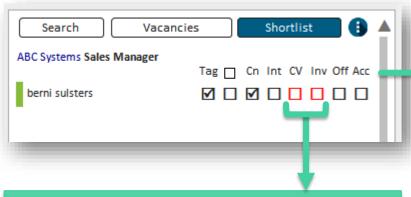
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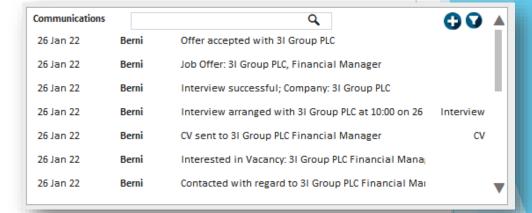
The Shortlist Process

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 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.



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)

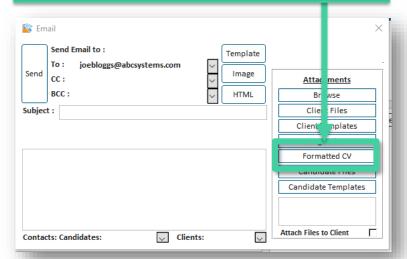
5a. Click on CV tickbox to send the candidate's formatted CV to the client. The TO: email address will be populated by the email address of the company contact person set from the Vacancy. But you can type in any email address here – just click into the field and

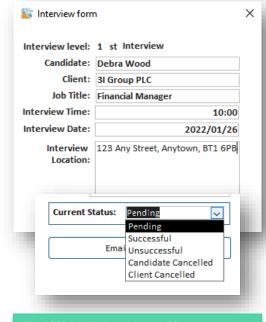
You can type in your Subject and Message and attach the current candidate's Formatted CV.

copy/paste or type what's needed.

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"!

Vacancy ID		Debra Wood 3I Group PLC 322 Financial Manager									
							Sal	Rate/ ary	Client fee	%	Notes:
						Normal pay rate	R150 (00.00	R12 000.00	8	
						Overtime rate 1					
Overtime rate 2											
Type of I	mpioy	ment	Perm	/							
Start Date			01-Feb-22								
	End	Date									
Owning	g Consu	ıltant	Shane	~							
		0	lffer A	ccepted	i						
	_		Delete Record		Booking Form						

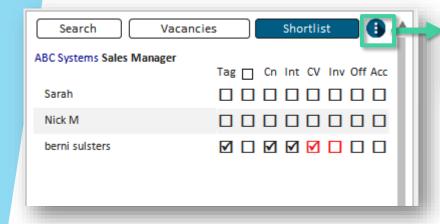


Sintelligence Cheat Sheet: Shortlists

Shortlist Extras

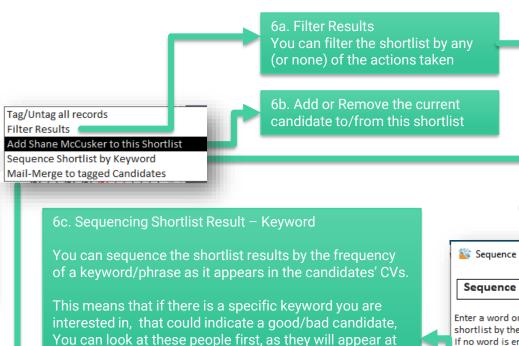
the top of the list.

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



6e. Mail Merge to Tagged candidates.

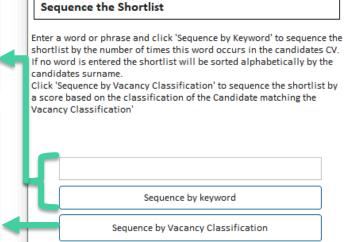
You can send a bulk mail or mail merge to all the Tagged candidates. Please refer to the Cheat Sheet for Bulk Emails for more on this option.



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.



Show All Show No Actions

Show Tagged

Show Offer

Show Accepted

Show Contacted Show Interested Show CVs Sent Show Interview

