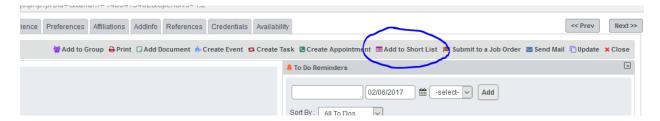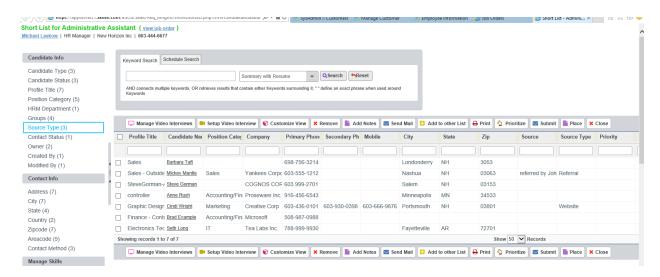## Shortlisting Candidates

Sending a candidate to the short list is intended to be a 'first-step' in the application process. The short list is your call list or 'tear sheet' of candidates that you *think* may be interested and / or qualified for a particular job, but still need to discuss the possibilities with the candidates.

To shortlist a candidate, double-click to open the candidate record in summary view. There will be a series of menu options at the top:

Select 'Add to Short List'. This will open a window of different job order titles that you can short list a candidate to. You may also search for the job order by company name or job location. After selecting the correct job order, you will get a pop-up message informing you the candidate was successfully short listed. You can verify by expanding the Short List from the Action section on the right hand side of the Summary screen. You may also run a report to see a list of shortlisted candidates (Analytics → CRM → Candidates → Short Listed Candidates by Job).

To manage the short list, you can go to the Job Orders grid (If Short List column is not displayed, can add it through 'Customize Columns') or by opening any JO and clicking the 'Manage Shortlist' link.

In the 'Manage Short List' dialog box, you can remove a candidate, submit a candidate, add a note, etc. You also have the ability to use AkkuSearch, keyword search and search from within each column. When finished working in the Manage Short List dialog box, click <Close> to return to your previous screen.

Additional Shortlist Information

Please note that you cannot shortlist a candidate after they have been submitted to a JO However, if a candidate has mistakenly been submitted prior to confirming their interest or qualification for the job, the status of the submission may be updated to 'CANCEL'. The candidate may now be added to the short list. If the candidate is resubmitted to that job, it will become a second line item in the submissions window.

If there is ever a need to merge candidate records because a duplicate was created inadvertently, short list details from the secondary record are also appended during the merge process.