

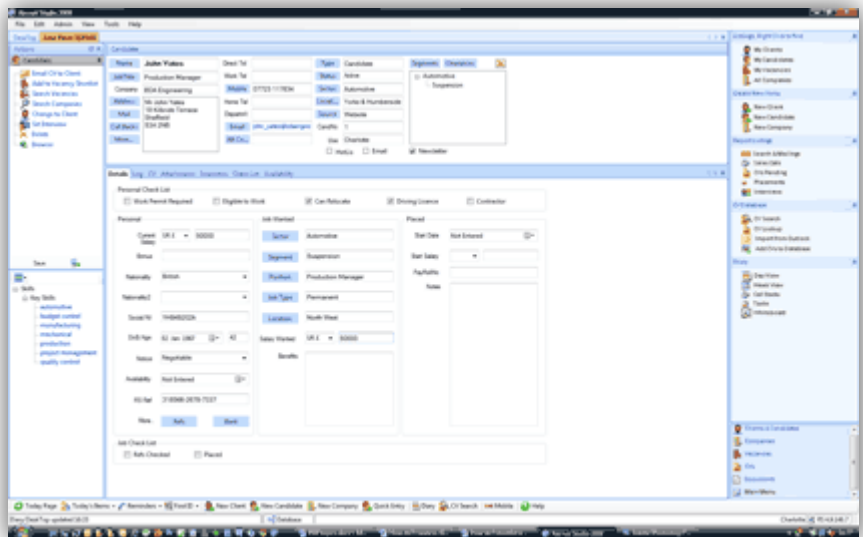
How do I create a client list/vacancy shortlist for a candidate?

There are several ways to shortlist a candidate for a vacancy, depending on how you approach the vacancy or candidate. The main options available to you are:

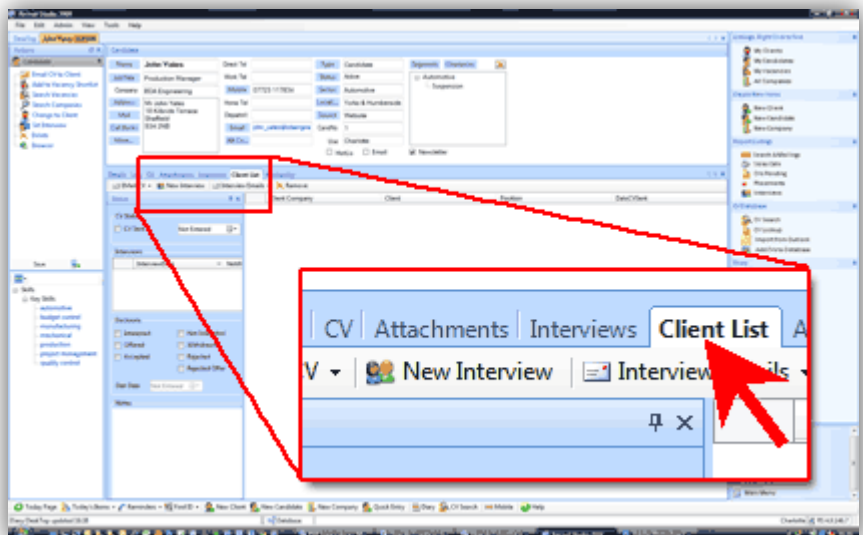
- Manually shortlist a candidate in the vacancy record using drag and drop
- Create a shortlist of one or more candidates from a Search & Mailings search
- Shortlist a candidate for a vacancy within the candidate record

This help guide will show you how to **save a list of clients or vacancies that are applicable to a candidate**. You can save a shortlist of vacancies or you can create a less formal list of clients who you may want to market to the candidate. This method assumes you know which clients or vacancies you wish to shortlist.

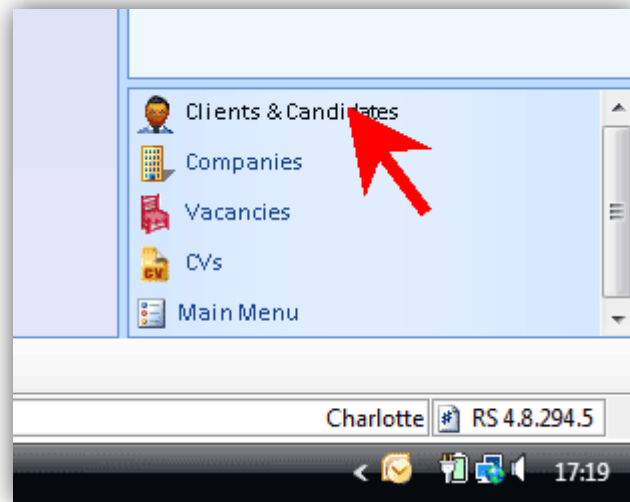
1. Open the candidate record.



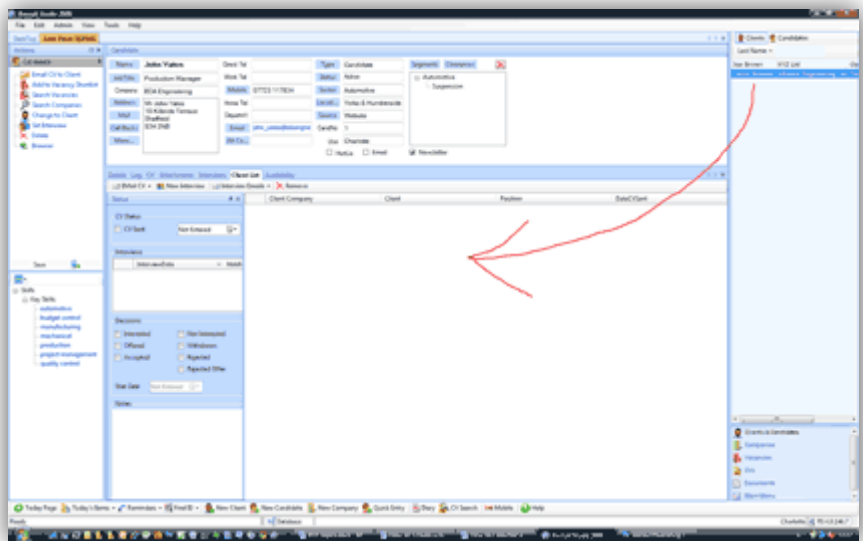
2. Go to the 'Client List' tab.
This is where the list will appear.



- Use the look up panel to find either clients or vacancies – you can attach both clients and vacancies to the record.

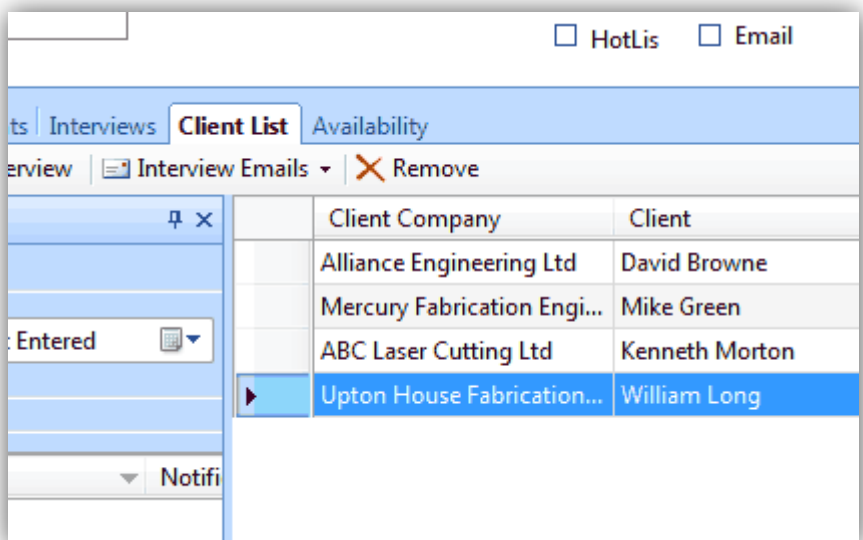


- When you have identified which client/vacancy you wish to associate with the candidate, drag the name over to the 'Client List' tab...



- ...And the client or vacancy will be added to the list. You can add as many as you wish and the list can comprise of both clients and vacancies.

You can now send the candidate's CV to the clients, arrange interviews and so on.



- When you close the record and save the changes, the candidate will now be visible on the vacancy you dragged in. The information is mirrored so you can view it from either way.

See also:

- *How do I create a shortlist of one or more candidates from Search & Mailings?*
- *How do I shortlist a candidate for a vacancy?*
- *Look up a record by name?*