How do I shortlist a candidate for a vacancy?

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 **manually shortlist a candidate** when in the vacancy record. It assumes that you have the name of a candidate and that you have created a vacancy record.*

1. Open the vacancy record.
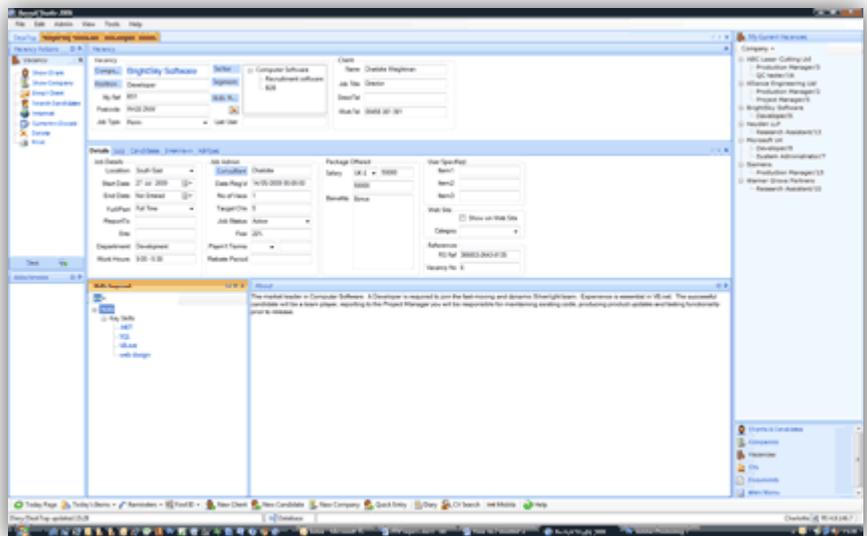
2. Go to the 'Candidates' tab. This is where the shortlisted candidates will appear.
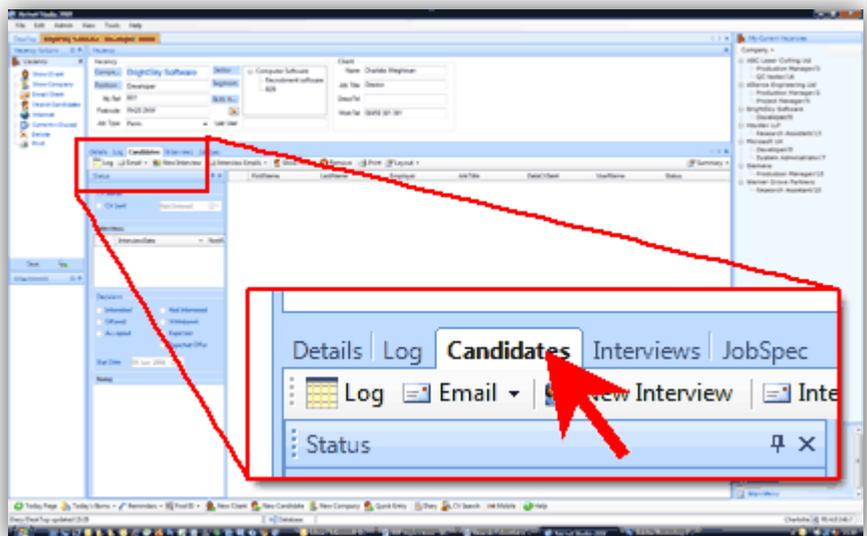
3. Click the 'Clients & Candidates' button on the bottom of the main menu to open the look up panel.
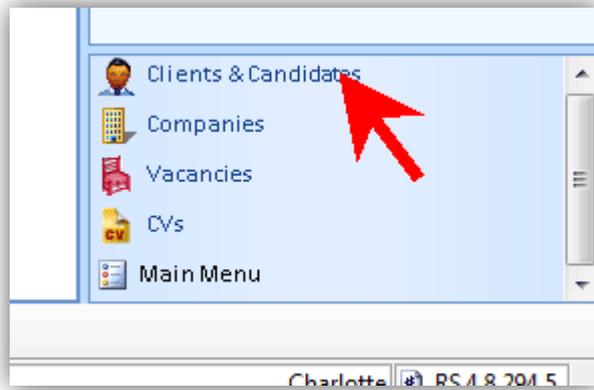
4. Look up the candidate you wish to shortlist but do not open their record.
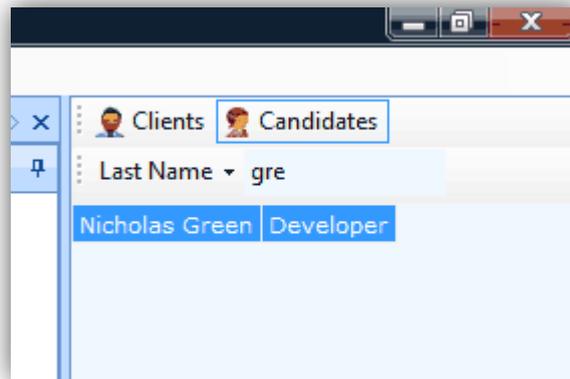
5. Drag the candidate's name to the 'Candidates' tab of the vacancy record…
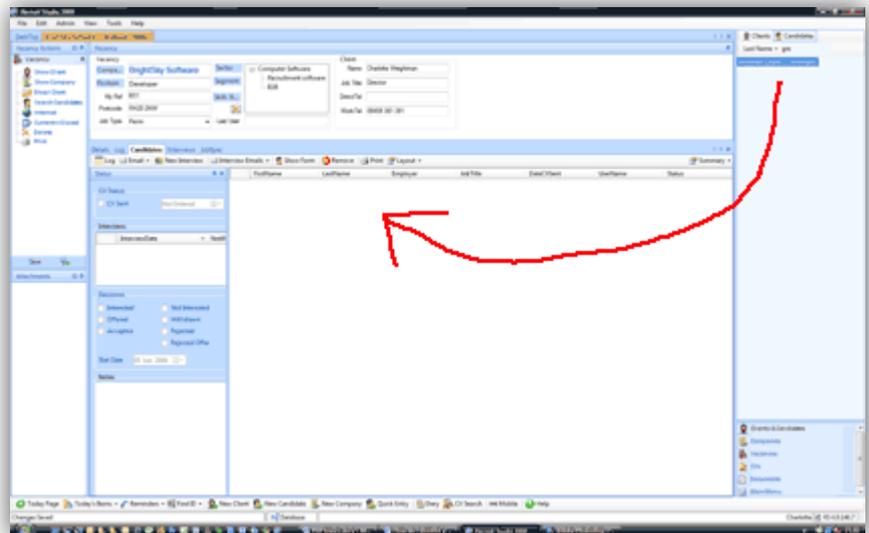
6. The candidate will be added to the list. You can now send the CV to the client, arrange interviews and so on.
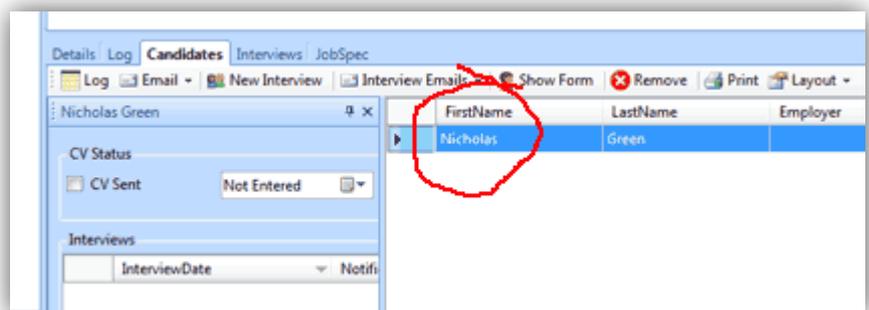
7. When you close the vacancy and save the changes, the vacancy will now be visible in the candidate's record – on the 'Client list' tab. Any changes you make will be mirrored on the candidate/vacancy records.
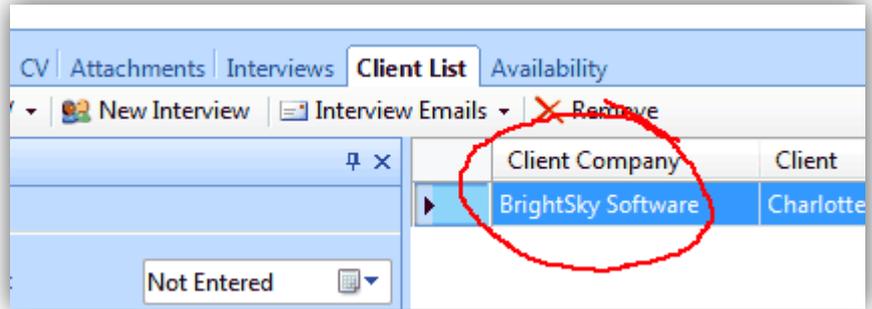
See also

- *How do I create a shortlist of one or more candidates from Search & Mailings?*

- *How do I shortlist a candidate for a vacancy within a candidate record (the mirror of this help guide)?*

- *Look up a record by name?*