Short list

Refers to:
vacancies form → short list

This table is the main work view for **permanent** and **temp** contract vacancies. Here, after a Search has found the initial matches, you can manage all the candidates who you are considering for the vacancy and their current states.

The state shows where the candidate has progressed to through the vacancy. The **Reject Reason** can be used for temporary notes, until the next progress change.

CVs are sent using the **Send CVs** button.

Bulk letters can be sent using the **Process button** to utilise Mail Merge Individual contacts are made by Expanding the **Progress** and working from there. The Desktop, Progress due for Action tab gathers all Progress together for working on.

Button	Use
Expand	Open the progress record for each candidate. From here you manage the progress of the vacancy and Contact Events.
Add	Add a named candidate to the Applicant list.
Remove	Remove the selected candidate or candidates from the Applicant list.
Applicant	Open the candidate’s detail record.
Placement	Place the candidate in the vacancy.
Process	Display the current progress of the vacancy.
Send CVs	Send the candidates’ CVs to the client.
Copy ShortList	Allows you to search other vacancies to copy the short list or part of the short list over from.

From version 2.20.4 onwards the vacancy short list can be tidied by hiding Candidates from view. This does not affect the Candidate's progress history, which can still be viewed on the Candidate record.

Simply tick the Hide box on the vacancy shortlist to hide candidates from view, the Show Hidden button can be used to see all candidates on the list.



In order to contact multiple candidates on the short list at the same time the noticiations system can be used to contact them at the same time with the relevant details merged in and any necessary documents attached e.g. interview tips or directions to the interview location. From version 2.21.08 it is also possible to use the notifications system to send all the interview information to the client under one notification (using progress merge fields) rather than having an email per candidate going to the client.

see also
Adding a specific person to the short list

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