

Quick Guide

Create candidate manually

Overview

Create a candidate manually can easily be done with a few steps.

In this guide, these steps will be explained as well as a few tips:

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- [Add candidate information](#)
- [Candidate profile](#)
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- [Documents](#)
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Add new candidate manually

Should you receive an application by email and want to be able to access the candidate in the system, add the new candidate manually.

Click 'Add new candidate' on the candidate list on the correct project.

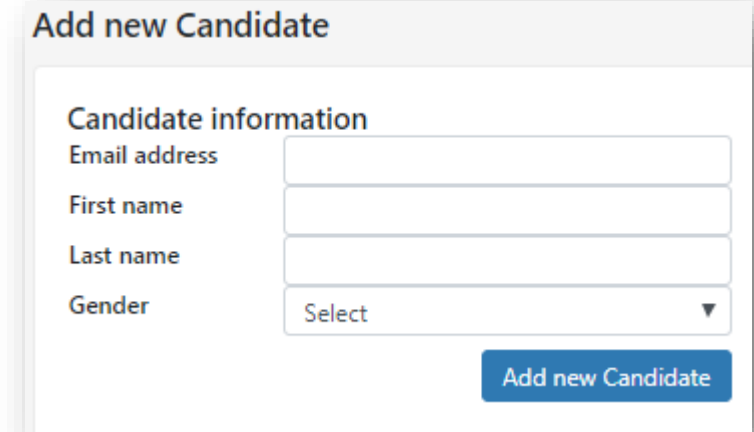
Add new Candidate

Page Options

	Photo	Last name	First name	Status	Rank
		Johnsen	Tor	Transferred from candidate db	★★★★☆
		Pedersen	Pernille	Offer accepted	★★★★★
		Hamad	Yunus	Rejection after interview	★★★★☆

Add candidate information

Candidate's email address, first and last name are mandatory fields and have to be filled in.
-The gender does not have to be selected.



The screenshot shows a form titled "Add new Candidate". Under the heading "Candidate information", there are four fields: "Email address", "First name", "Last name", and "Gender". The "Email address", "First name", and "Last name" fields are text inputs. The "Gender" field is a dropdown menu with "Select" and a downward arrow. A blue button labeled "Add new Candidate" is located at the bottom right of the form.

If you receive the following message after clicking 'Add new candidate', it is because the candidate already has a profile in the system.

Simply click 'Use existing candidate' to add and access the candidate's profile directly.

Warning

A candidate with the e-mail address 'xx@xxx.net' is already registered. Click the button below if you want to use this candidate. Otherwise, select a different username.

Use existing candidate


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Candidate profile

Once the candidate has been added, the candidate profile will appear.

Here you will see the candidate data, and you can add if required.

Main project



Tor Johnsen

Location
Road 12
1234, Copenhagen

Personal infoDocumentsQuestionnaireNotesCommunicationApplicationsAppointments

Personal info

Queue Number3
Candidate Id2109751
First nameTor
Last nameJohnsen
AddressRoad 12
Postal code/City1234Copenhagen
CountrySelect
GenderMale
Date of birth12October1973
SSN
Email addressxx@xxx.net
Mobile phone (incl. area code)12345678

Process

Status--Transferred from candidate cOK
RankNot recommendedOK
Hired

Other information

Where did you hear about this position?Select
Internal/externalInternalExternal
Preferred languageDefault
Application languageEnglish

Assigned tags

The selected tag is shown in the candidate list to the left of the name of the candidate.
TagAdd tag
Comment
☐ Show globalOK

☒ Update personal information across all projectsConfirm ApplicationUpdate

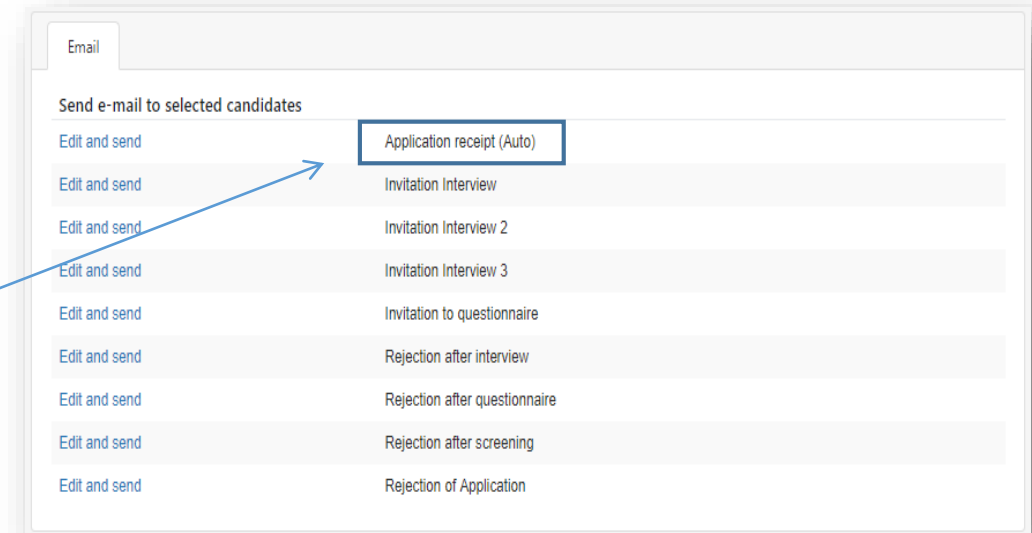
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Confirm receipt of application

Manually added candidates do not receive the automated application confirmation email.

The confirmation mail, often called 'Application receipt (Auto)', can be sent from the candidate profile, under the email template list.

To send click 'Edit and send'.



Documents

The candidates documents can be uploaded under the tab 'CV/Other documents'.

Add Cover letter under 'Add Cover letter'.

CV and other documents can be added under 'CV/Other documents'.

The screenshot shows a candidate profile for Tor Johnsen. The 'Documents' tab is active. The cover letter section is empty, with a 'Save' button. Below it, a table shows no records for documents. The 'Add cover letter' section has a text input, a 'Select' button, and an 'Upload' button. The 'Documents' section has a table with columns: Document Name, Size, Category, Visible for the candidate, Last updated, and Action. The table is empty. Below the table, the 'Add document' section has a 'Category' dropdown set to 'Other documents', a 'Select document' button, and an 'Upload' button. The 'Digital Signature Documents' section is also empty.

Personal info Documents Questionnaire Notes Communication Applications Appointments

Please use this section to write/upload your cover letter and upload necessary requested attachments.

Cover letter

Below you can view the cover letter which the candidate has provided with the application.
If the candidate has uploaded a cover letter document, you can click the icon and open it.

Document Name **Size** **Last updated** **Action**

No records to display

Add cover letter

This candidate has not uploaded a cover letter. Select a file and click 'Upload' to add a cover letter for this candidate.

Select document

Documents

The list below shows all documents that the candidate and you or your colleagues have uploaded to the system, and the documents that may have been generated by the system.
Click on a document name to open it.
Select category and click on **Browse...** if you want to upload a document. You may decide whether the document should be visible for the candidate - and whether the document should only be attached to the current project.
If you want to delete a document, click on **Delete** to the right of the selected document.

Document Name	Size	Category	Visible for the candidate	Last updated	Action
No records to display					

Add document

☐ Make the document visible for the candidate.
☒ The document is to be attached only to the current project 'Main project'.

Category

Digital Signature Documents

Below are the documents sent for digital signature.

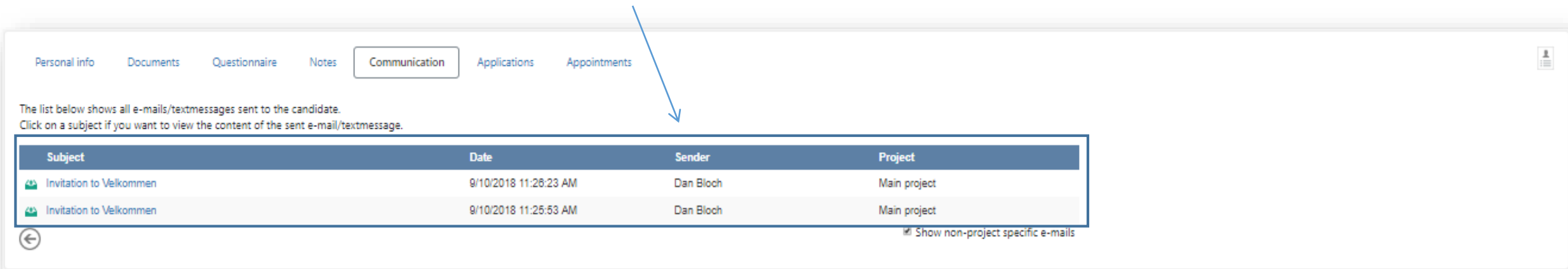
ID	Original Document	Digital Signature Document	Provider	DateTime	Status	Actions
No records to display						

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Communication



To view all emails sent to the candidate and the activity log, simply click on the 'Communication' tab.


In this example the log shows, that the candidate is created manually and that the user, 'HR Manager Support DK' has sent the confirmation email to the candidate.



Personal info Documents Questionnaire Notes **Communication** Applications Appointments

The list below shows all e-mails/textmessages sent to the candidate.
Click on a subject if you want to view the content of the sent e-mail/textmessage.

Subject	Date	Sender	Project
 Invitation to Velkommen	9/10/2018 11:26:23 AM	Dan Bloch	Main project
 Invitation to Velkommen	9/10/2018 11:26:53 AM	Dan Bloch	Main project

 ☒ Show non-project specific e-mails

You now know how to add a candidate manually

Please contact Support for any further information 😊

Tel: +45 72 44 06 44

Email: support@hr-manager.net

[Chat with us](#)



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