Quick Reference Guide – Applicant card actions

Applicant actions

These are general actions relating to an applicant. These actions are **not** specific to a particular job application. Applicant actions are located in the top right hand corner of the Applicant card.

Add note	Record a note about the applicant. The note will be stored in the Applicant history with the date, time and name of the person who wrote the note.
Add document	Upload a document relating to the applicant. The document will be stored in the Applicant history with the date, time and name of the person who uploaded the document.
Communicate	Send a once off communication to the applicant via email or sms (e.g. email advising the applicant job has been put on hold). Save time by using an existing template or write your own communication.
Control	View the Applicant services area as if you are the applicant. This feature can be useful when supporting an applicant who is having difficulty with their application.
Edit	Update an applicant's personal details, such as phone number, email address or name.
Invite to apply	Invite an existing applicant to apply for a current job. An email will be sent to the applicant with a link to the job that you have suggested.
Lock applicant	Placing a lock on an applicant ensures that only one person is able to change the applicant's status or edit their details (locked applicants are still visible to other users).
Merge	Merge two applicant accounts into one if you have identified duplicates. See **Duplicate Management & Merging Applicants** in the Online help for more info.
New application	Apply an existing applicant to a current job. This action is useful when you have discussed an opportunity with the applicant and agreed that they will be considered for the role
New task/reminder	Add a new task to the Task panel on your Dashboard or assign a task to another user. A link to the Applicant card will be available from within the task.
Research	Visit sites such as LinkedIn, Google and Google Maps to research the applicant. This action provides another way for you to obtain information about the applicant.
Reset password	If an applicant is unable to access the system, the Reset password action will email the applicant with a new system generated password.
Remove	If an applicant has requested that their details be removed from the system, this action can be used. Note – this action will permanently delete the entire applicant account and all related applications, notes, documents, etc.
View profile	View the most recent profile information for an applicant. Information may date back to initial submission or may have been updated in the Applicant services area.

More like this	Performs a talent search for applicants with similar tags or categories.

Application actions

These are actions that relate a specific job application. Application actions are located on the right of the applications table (on the Applicant card).

Add activity	Update the system to reflect recruiter activity when statuses have not been changed correctly throughout the process. This action will give you the opportunity to ensure that reports are accurate and up to date.
Add document	Browse your network/pc to upload a document that is specific to a job application. The document will be stored in the Applicant history with the date, time and name of the person who uploaded the document, e.g. Interview notes.
Add document from file	Merge an application specific document using the document library that is stored in PageUp People, e.g. Offer letter
Add note	Record a note that is specific to a job application. The note will be stored in the Applicant history with the date, time and name of the person who wrote the note.
Assign application	Assign the application to a user of the system for review (such as a Hiring Manager). The user will need access to PageUp People to review the applicant online.
Change status	Update the application status for a specific job application.
Communicate	Send an application specific communication to the applicant via email or sms. Save time by using a template or write your own communication.
Compile and send	Compiles the applicant's documents to export as a PDF and allows for printing or emailing.
Edit application flags	Edit the application flags that are currently displaying against an application. This might mean activating a new flag or de-activating an existing flag.
Edit application source	Update the source information that is currently stored against an application. This action is useful if the applicant has selected the wrong source during their initial submission and will ensure that source effectiveness reports are accurate.
New booking to an existing event	Manually book an applicant into an event that is already created in the system. (Only relevant to clients using the *Bookings & Events* module)
New booking to a new event	Manually create a new event and book the applicant into the event. (Only relevant to clients using the *Bookings & Events* module)
New task/reminder	Add a new task to the Task panel on your Dashboard or assign a task to another user. A link to the Applicant card will be available from within the task.
New form	Complete a phone screen or reference check form for a specific job application. The form library can be managed by your system SuperUser. (Only relevant to clients using the *Internal forms* module)

New referral	Adds a new job referral.
Offer details	View the Offer details page (Offer card) for a specific job application. View existing offer details or update offer related information.
Send application	Send application specific information to another user of the system via email.
Send application and change status	Update the status of an applicant and communicate with a user of the system in one action. This action is often used when shortlisting applications for Manager review.
View references	Allows you to manage references, create a new reference, or invite references.
Undisclosed application	Changes the application to be undisclosed.