



Quick Reference Guide – Bulk compile and send

What you need to do	What you will see																		
<p>STEP 1: Select the applicants</p> <p>After reviewing the applications for a particular job, use the checkboxes to indicate the applicants to be included in your PDF document.</p> <p>Your PDF might only include those applicants who have been shortlisted, or you may choose to include all of the applicants who have applied for a job.</p> <p>TIP: If you would like to compile all of the applicants who have applied for a job, click All pages in the Select drop-down list.</p>	<table><tr><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td>11 Nov 2011</td><td>New</td><td>Andy</td><td>Applicant</td></tr><tr><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td>11 Nov 2011</td><td>New</td><td>Mandy</td><td>Matcher</td></tr><tr><td><input checked="" type="checkbox"/></td><td><input type="checkbox"/></td><td>11 Nov 2011</td><td>New</td><td>Robert</td><td>Reliable</td></tr></table> <div><p>Select records:</p><ul style="list-style-type: none"><input checked="" type="checkbox"/> All pages<input checked="" type="checkbox"/> Current page<input type="checkbox"/> All pages<input type="checkbox"/> Current page<input type="checkbox"/> All pages<input type="checkbox"/> Current page<input type="checkbox"/> Clear all selections</div>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11 Nov 2011	New	Andy	Applicant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11 Nov 2011	New	Mandy	Matcher	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11 Nov 2011	New	Robert	Reliable
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<p>STEP 2: Select Bulk compile and send</p> <p>From the Select a bulk action menu at the top of the page, select Bulk compile and send.</p>	<div><p>Select a bulk action</p><ul style="list-style-type: none">Select a bulk actionBulk applyBulk categoriseBulk assignBulk communicateBulk compile and sendBulk document mergeBulk exportBulk invite to applyBulk lockBulk moveBulk move and sendBulk task/reminderBulk unlock</div>																		
<p>STEP 3: Select documents</p> <p>Select the documents you would like to include in the PDF (e.g. resume, application form).</p> <p>Click the Create PDF button at the bottom of the page.</p>	<div><p>Bulk action status: 4 Applicants Complete</p><p>You have selected 4 applicants to compile documents for, please select the documents you would like to include.</p><p>Application details</p><ul style="list-style-type: none"><input type="checkbox"/> Applicant personal details<input type="checkbox"/> Application form<input type="checkbox"/> Application notes<input type="checkbox"/> Completed reference check forms<input type="checkbox"/> Completed phone screening forms<p>Applicant documents</p><ul style="list-style-type: none"><input type="checkbox"/> Background/Police Check<input type="checkbox"/> Candidate Authority Form</div>																		
<p>STEP 3: Download the PDF</p> <p>You may wish to download the PDF. If you would like to download the PDF, right click on the Download document link and select Save Target As....</p> <p>Indicate where you would like to save the PDF. You may also like to re-name the file.</p>	<div><p>Bulk action status: 4 Applicants Complete</p><p>To download the document, right click on the link below and select 'Save Target As'. Note: To send the document it is not necessary to download the document below. The document will be sent as an attachment with the communication below.</p><p>Your document is ready to download: Download document (20.6 kb)</p></div>																		



STEP 4: Send the PDF

If you would like to send the PDF to a colleague, Hiring Manager, or even yourself, select the **Yes** radio button.

You can send the PDF to a user of PageUp People by searching for their name in the **User** field

You can also choose to email the PDF to **Other e-mail**; this field is used when sending the PDF to people who are not users of PageUp People. In this case, simply type in the email address.

Include a From address, a Subject line, and make any changes to the body of the email.

Click the **OK** button to send the PDF.

The Bulk Compile and Send will be recorded in the **Applicant history** for all included applicants.

The screenshot shows a web form titled "Send document:" with two radio buttons: "Yes" (selected) and "No". Below this are several input fields: "User:" with a search icon and a dropdown menu showing "No user selected."; "Other e-mail:"; "From: *" with a text input field; "Subject: *" with a text input field; and "Body: *" with a large text area. A yellow bar with a plus icon and the text "Show merge field information" is located below the "Body: *" field. At the bottom, there is a "Format selection" dropdown menu, a set of formatting icons (bold, italic, bulleted list, numbered list, link, unlink, etc.), and a "Tools" button. The text "Please see attached the applications for:" is displayed at the very bottom of the form area.