

Note: Applicant interactions can occur outside of Connect or within Connect

- If communicating outside of Connect, use the **Add Interaction** function to record the applicant interactions that occurred either by phone, email, text, in-person, etc.
- Alternatively, use the **Send Message** function to record electronic communications between you and the applicant(s) directly from within Connect
- This job aid will show both functions

1. Select **My Team** to display your manager functions
2. Click **Hiring**

Good afternoon, Arya Stark!

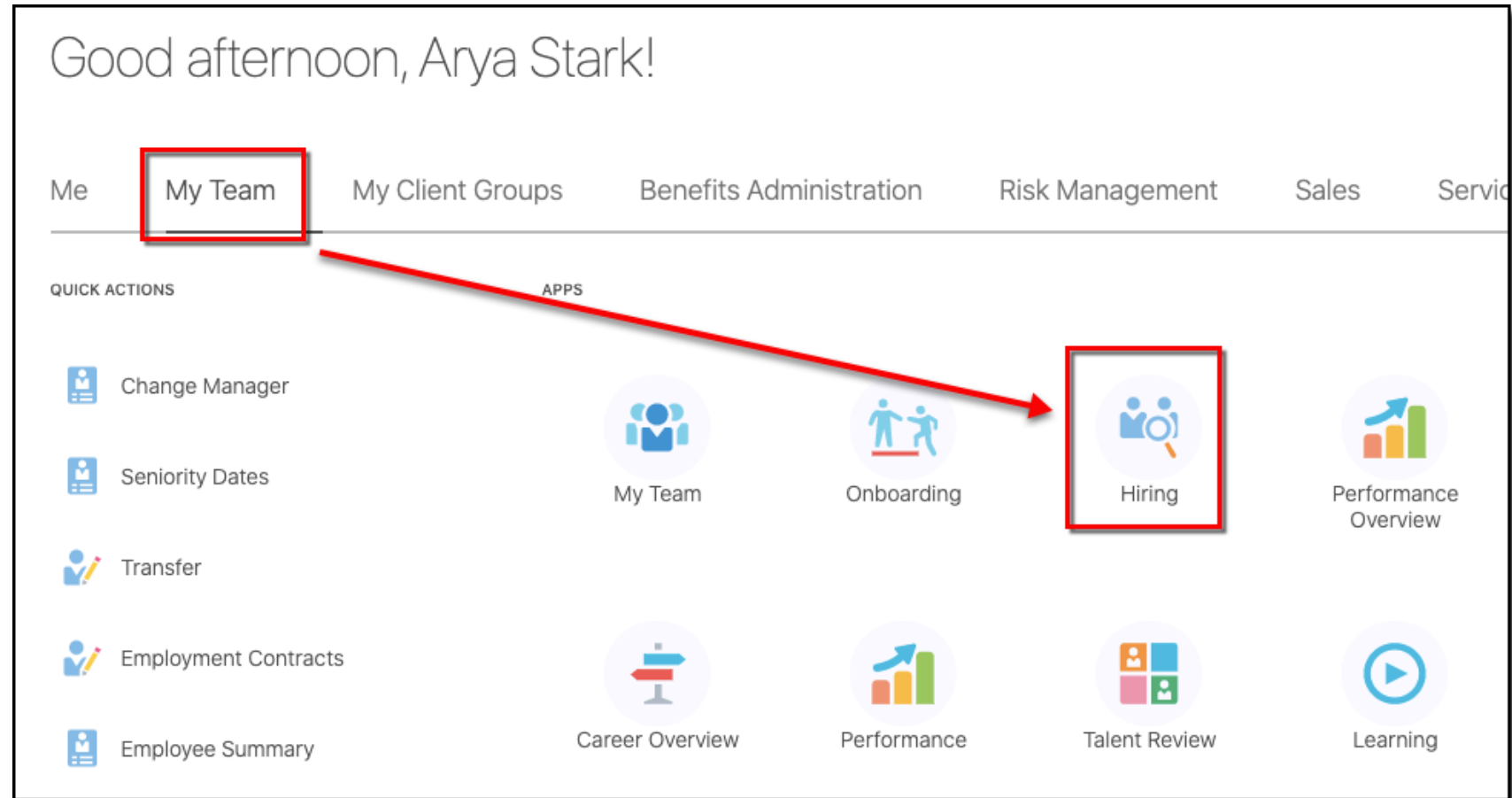
Me **My Team** My Client Groups Benefits Administration Risk Management Sales Service

QUICK ACTIONS

- Change Manager
- Seniority Dates
- Transfer
- Employment Contracts
- Employee Summary

APPS

- My Team
- Onboarding
- Hiring**
- Performance Overview
- Career Overview
- Performance
- Talent Review
- Learning

The screenshot shows a user interface for a management system. At the top, it says "Good afternoon, Arya Stark!". Below this is a navigation bar with several menu items: "Me", "My Team", "My Client Groups", "Benefits Administration", "Risk Management", "Sales", and "Service". The "My Team" item is highlighted with a red box. Below the navigation bar, there are two main sections: "QUICK ACTIONS" and "APPS". The "QUICK ACTIONS" section contains five items: "Change Manager", "Seniority Dates", "Transfer", "Employment Contracts", and "Employee Summary". The "APPS" section contains seven items: "My Team", "Onboarding", "Hiring", "Performance Overview", "Career Overview", "Performance", and "Talent Review". The "Hiring" item in the "APPS" section is highlighted with a red box. A red arrow points from the "My Team" item in the navigation bar to the "Hiring" item in the "APPS" section.

3. Click the **Candidate Search** tab
4. Use a **keyword** or edit the search **filters** to locate the desired applicant(s)

The screenshot displays the 'Candidate Search' interface. The left sidebar contains navigation options: Job Requisitions, Candidate Search (highlighted with a red box), Campaigns, Candidate Pools, and Job Offers. The main content area is titled 'Candidate Search' and shows 'Candidates (500)'. A search bar with the placeholder 'Search' and a 'Show Filters' button are highlighted with a red box. A red arrow points to the 'Show Filters' button. Below the search bar, there is an 'Actions' dropdown menu and a 'Sort By' dropdown menu set to 'Relevance'. The candidate list includes:

Actions	Sort By	Relevance
<input type="checkbox"/>	Blair, Roneisha (5538)	Lansing, MI, US
<input type="checkbox"/>	Matsumoto, Brittany (5548)	Lansing, MI, US
<input type="checkbox"/>	Sutton, Joshua (5577)	Lansing, MI, US
<input type="checkbox"/>	Rubin, David (5217)	Lansing, MI, US
<input type="checkbox"/>	Manley, Jason (5270)	Lansing, MI, US

5. To add an interaction that occurred outside of Connect, click the **ellipsis (...)** for the desired applicant
6. Select **Add Interaction**

The screenshot displays the 'Candidates (500)' interface. At the top right is a '+ Add' button. Below it is a search bar and a 'Show Filters' link. An 'Actions' dropdown menu is visible. The 'Sort By' dropdown is set to 'Relevance'. A list of three candidates is shown:

- Blair, Roneisha (5538)
Lansing, MI, US
- Matsumoto, Brittany (5548)
Lansing, MI, US
- Sutton, Joshua (5577)
Lansing, MI, US

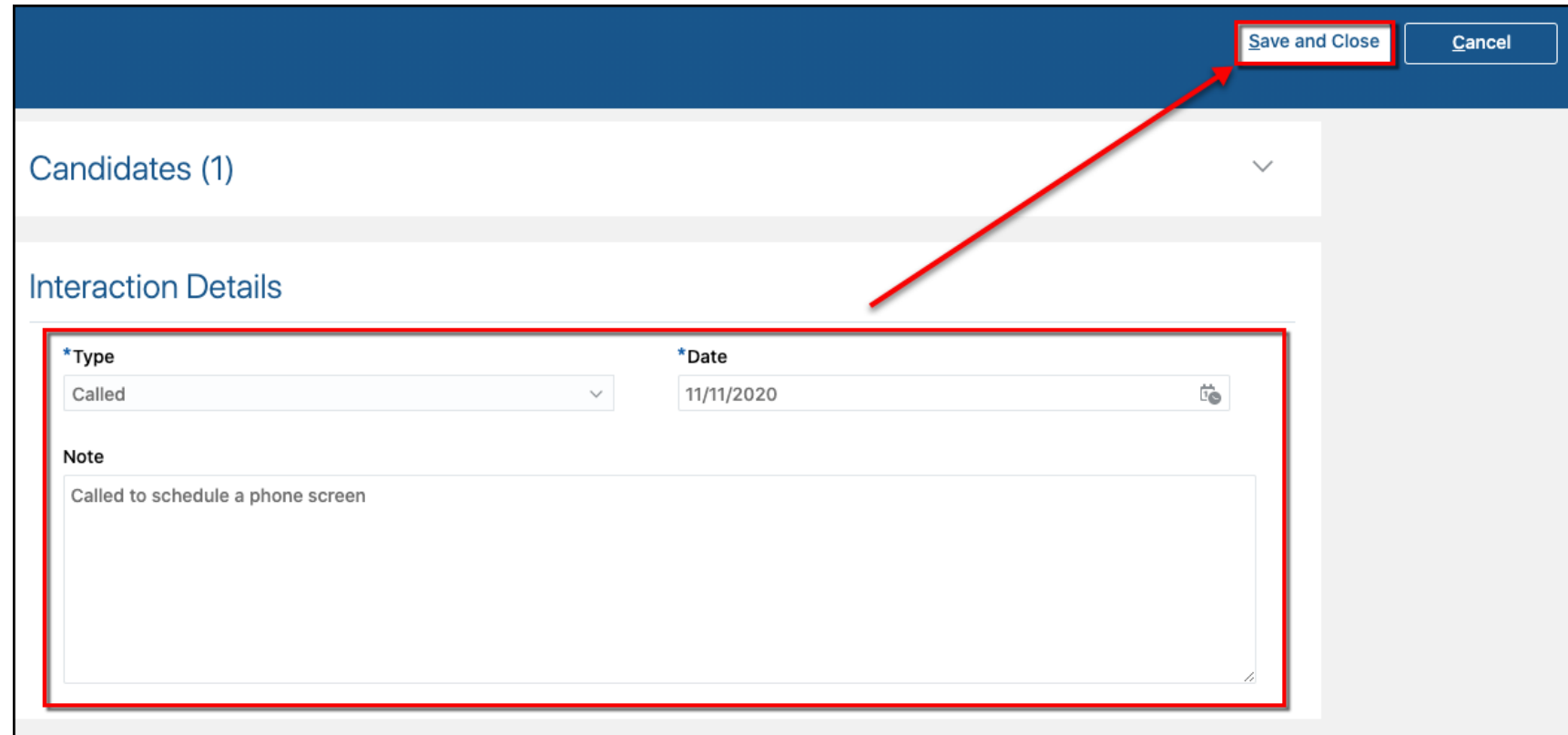
A red arrow points from the ellipsis (...) next to the first candidate to an open actions menu. The menu contains the following options:

- Add to Requisition
- Add to Candidate Pool
- Add Interaction
- Send Message

7. Enter the **Interaction Details**

8. Click **Save and Close**

Note: A brief notification will appear indicating the interaction was added



Candidates (1)

Interaction Details

*Type: Called

*Date: 11/11/2020

Note: Called to schedule a phone screen

Save and Close Cancel

9. To view the **Interaction**, click on the applicant's name

Candidates (500) + Add

Search 🔍 Show Filters

Actions Sort By Relevance ▼

Blair, Roneisha (5538)
Lansing, MI, US ⋮

10. Select the **Interactions** tab

11. Review the **interaction** details

←

Details

Activity

Attachments

Interactions

Screening

Extra Info

View Interactions With Candidate ▼

Interactions

- SY** System
11/11/2020 | Called
Candidate Profile
Called to schedule a phone screen
- SY** System
10/8/2020 | Sent Text Message
Candidate Profile
Test

12. To send a message from within Connect, click the **ellipsis (...)** for the desired applicant

13. Click **Send Message**

Note: You can also select multiple applicants and send a message from the **Actions** button

The screenshot shows a web interface titled "Candidates (500)". At the top right is a "+ Add" button. Below the title is a search bar labeled "Search" and a "Show Filters" link. On the left, there is an "Actions" dropdown menu. On the right, there is a "Sort By" dropdown menu set to "Relevance". The main area contains a list of three candidates, each with a checkbox and their name and location:

- Blair, Roneisha (5538)
Lansing, MI, US
- Matsumoto, Brittany (5548)
Lansing, MI, US
- Sutton, Joshua (5577)
Lansing, MI, US

A red box highlights the "Send Message" option in the expanded actions menu for the first candidate. Red arrows point from the text instructions to the "Actions" button and the "Send Message" option.

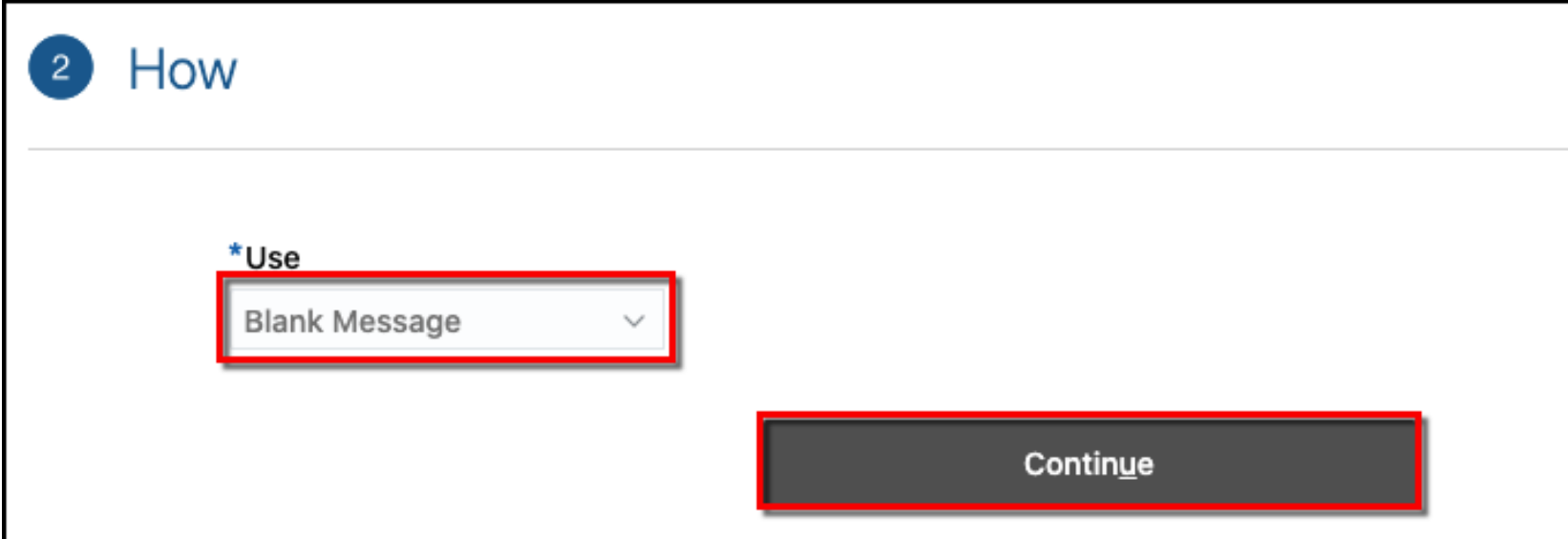
14. Verify the applicant's email address

15. Click **Continue**

The screenshot shows a verification step titled "1 Candidates". It displays the name "Roneisha Blair (5538)" and her email address "cmhatest20+blair@gmail.com". A red box highlights the email address and a "Continue" button below it.

16. Select **Blank Message** for Use

17. Click **Continue**



The screenshot shows a form titled "2 How". Below the title is a dropdown menu with the text "*Use" above it and "Blank Message" selected. To the right of the dropdown is a "Continue" button. Both the dropdown and the button are highlighted with red boxes.

18. Enter the **subject** of the message

19. Enter the message **text**

20. Click **Continue**

3 Message

Token

Insert ▾

Email Content

Subject

*Message Text

Helvetica ▾ 2 ^ ▾

B I U S₂ S² S

Continue

21. Preview the **message**

22. Click **Send**

Note: A brief notification will appear indicating the message was sent to the applicant(s)

The screenshot displays a software interface for sending messages. At the top right, there are two buttons: 'Send' and 'Cancel'. The 'Send' button is highlighted with a red border. Below the buttons is a list of four steps, each with an 'Edit' button:

- ① Candidates
- ② How
- ③ Message
- ④ Preview

The 'Preview' step is highlighted with a green border. Inside the preview area, there is a red-bordered box containing the following text:

Email Content
Subject
Subject
Message Text
Message text

A red arrow points from the 'Send' button to the 'Preview' step.

23. To view the **messages**, click on the applicant's name

Candidates (500) + Add

Search Show Filters

Actions Sort By Relevance

Blair, Roneisha (5538)
Lansing, MI, US

24. Select the **Interactions** tab

25. Review the **message** details

←

Details

Activity

Attachments

Interactions

Screening

Extra Info

View Interactions With Candidate

Interactions

- SY** System
11/11/2020 | Sent E-Mail
Candidate Profile
Message text
- SY** System
11/11/2020 | Called
Candidate Profile
Called to schedule a phone screen
- SY** System
10/8/2020 | Sent Text Message
Candidate Profile
Test

End of Procedure