

Candidate Tracker Guide

The Candidate Tracker gives you the ability to see all Jopwell members that have interacted with your job postings. This tool will allow you to easily keep track of key candidate information for those applying via Jopwell. This section will outline the following: - Filters - How to review a candidate - Column Information - Bulk Actions - Messaging - Notes - Statuses

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Accessing Candidate Tracker

Log in to Jopwell.com and select **Candidate Tracker** in the navigation bar.

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Once you have navigated to the Candidate Tracker, you should see a list of candidates that have engaged with your jobs. From this screen, you can:

1. Filter by dates, Job Title, Source, Application Status
2. Search for a specific candidate
3. See which candidates have been messaged, viewed, and starred
4. Sort by Candidate, Job Title, Location, Application Status
5. View Resumes and Notes
6. Source of candidate (Client Initiated or Organic)
7. Last modified, Sourced by, Recruiter Bucket, Created at

Filters

Filters can be found at the top of the Candidate Tracker page and allow you to sort down the candidate pool to view key information.

- Dates
- Job Title
- Sourced By
- Application Status
- Candidate Name
- Messaged candidates
- Viewed candidates
- Starred candidates

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Dates - Select the time frame manually or from pre-set periods to gauge traction on candidates interacting with your jobs.

Job Title - View candidates who apply to specific positions.

Sourced By - Monitor recruiter activity by selecting from the Sourced By dropdown.

Application Status - Filter candidates by stage, further described below:

- Prospect - Sent from Jopwell to the Partners ATS.
- Application Click Through - Candidate engaged with a job posting
- Confirmed Application - Application submitted
- Pipelined - Provided for our Enterprise clients
- Highlighted - Provided for our Enterprise clients
- Interviewing - Candidates actively interviewing
- Offer - Offer extended
- Candidate Withdrew - The candidate withdrew from the position
- Declined - Candidate not selected for the position

**note that keeping this update will be critical to successfully managing candidates from Jopwell.*

Candidate Name - Allows for the ability to search for specific candidates

Messaged candidates - Filter which candidates have been messaged on the platform

Viewed candidates - Candidates that have been viewed

Starred candidates - Stars selected by your company

Log in to Jopwell.com and select **Candidate Tracker** in the navigation bar.

Reviewing a Candidate

Click on any candidate to view the following:

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- An option to [View Profile](#)
- See by whom and when this candidate was reviewed

Selecting [View Profile](#) will direct you to the candidates full profile on Jopwell.

Columns

The following columns are available on the Candidate Tracker.

1. Candidate - View candidate name, and most recent/current position and company.
2. Job Title - Title of position the candidate engaged with
3. Location - Job Posting Location, if present
4. Latest Application Status - This shows the latest application status from Jopwell, from your ATS, or from manual updates made by your team to the Candidate Tracker. Application status updates other than “Prospect”, “Highlighted”, and “Pipelined” are visible to candidates.
5. Resume - Directs you to a link of the candidate’s current resume uploaded on Jowell.
6. Notes - The ability to add internal-facing notes visible to you and your team for collaboration.
7. Created At - When the application was submitted
8. Viewed At - When someone views a profile
9. Sourced By - Jopwell recruiter if an Enterprise level client
10. Source - Options will be Client Initiative or Organic. Client Initiated means the client has reached out to the candidate first. Organic is the client-finding the job posting and interacting on their own.
11. Recruiter Bucket - This is determined by Jopwell recruiters.
12. Last Modified By - Any changes to the application
13. Last Modified Date - Date of those changes

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Bulk Actions

Selecting candidates with the checkbox next to their names will allow you to conduct the following actions:

FROM 06/01/2020 TO 10/20/2021 2 WEEKS 1 MONTH 6 MONTHS

JOB TITLE APPLICATION STATUS CANDIDATE NAME ☐ ☒ Messaged candidates ☐ ☒ Viewed candidates ☐ ☒ Starred candidates











Showing 1 - 24 of 40 results

✕ 22 candidates selected [Select All 40 Candidates](#)

Update status

Export to spreadsheet

Download resume

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Brandon Digital Marketing Coordinator at [Company]	ACCOUNT COORDINATOR - [Progress Bar]	New York	APPLICATION CLICK THROUGH		+	07/06/2021	10/07/2021
<input type="checkbox"/>	<input type="checkbox"/>		Blake Brewery Representative at [Company]	ACCOUNT COORDINATOR - [Progress Bar]	New York	APPLICATION CLICK THROUGH		+	07/01/2021	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Quaheem Sales teaching assistant at [Company]	KEY ACCOUNT MANAGER - [Progress Bar]	Los Angeles	CONFIRMED APPLICATION		+	03/30/2021	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Jason Co-Founder at [Company]	OPERATIONS SPECIALIST	New York	CANDIDATE WITHDREW		+	02/24/2021	
<input type="checkbox"/>	<input type="checkbox"/>		Jonathan Assistant Director at [Company]	OPERATIONS SPECIALIST	New York	CONFIRMED APPLICATION		+	02/19/2021	

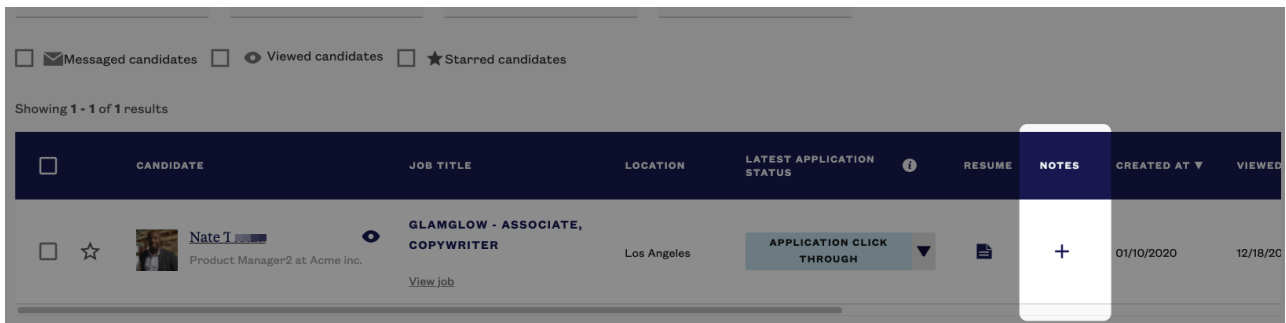
1. **Update status** - Change statuses in bulk. This is a great option if you are interviewing multiple candidates at one time and can build this into your workflow for updating information.
2. **Export spreadsheet** - This allows you to export all information from the Candidate Tracker to share with members of your team that might not have access to Jopwell.
3. **Download resumes** - Download resume files into a zip for easy sharing internally.

Notes

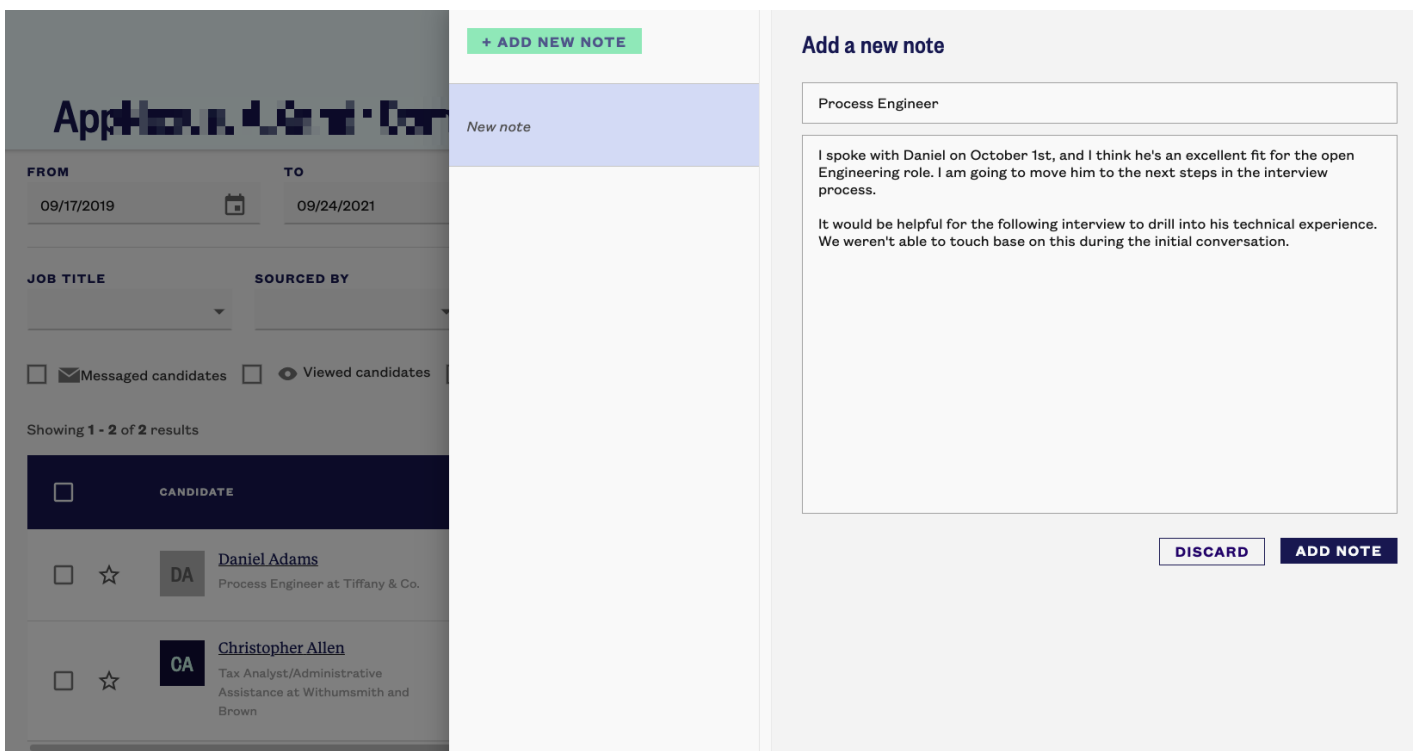
Notes on Jopwell are shareable for everyone within your company.

How to add a note to a candidate's application

1. You can access notes within Candidate Tracker.



2. Select the plus or notes icon under the Notes column in Candidate Tracker. If you haven't created a note, you'll be able to add a title and input your notes for the applicant. Afterward, click Add Note to complete your message.
3. Click Add Note and enter your notes.



How to edit or delete a note to a candidate's application

1. Select the notes icon under the Notes column in Candidate Tracker.
2. Select a note you'd like to Edit or Delete

The screenshot displays the 'Candidate Tracker' application. On the left, a sidebar contains a search bar and filters for 'FROM' (09/17/2019 to 09/24/2021), 'JOB TITLE', and 'SOURCED BY'. Below these are checkboxes for 'Messaged candidates' and 'Viewed candidates', and a status 'Showing 1 - 2 of 2 results'. The main area shows a list of candidates: Daniel Adams (Process Engineer at Tiffany & Co.) and Christopher Allen (Tax Analyst/Administrative Assistance at Withumsmith and Brown). On the right, a detailed view of a note for 'Process Engineer' is shown, published on 09/24/21 by Dave Jules. The note contains two paragraphs of text. At the top of the note view is a green '+ ADD NEW NOTE' button. At the bottom of the note view are 'EDIT' and 'DELETE' buttons.

App

FROM 09/17/2019 **TO** 09/24/2021

JOB TITLE **SOURCED BY**

☐ ☒ Messaged candidates ☐ ☒ Viewed candidates

Showing 1 - 2 of 2 results

☐ **CANDIDATE**

☐ ☆ **DA** **Daniel Adams**
Process Engineer at Tiffany & Co.

☐ ☆ **CA** **Christopher Allen**
Tax Analyst/Administrative Assistance at Withumsmith and Brown

+ ADD NEW NOTE

Process Engineer
Published on 09/24/21 by Dave Jules

EDIT

DELETE

I spoke with Daniel on October 1st, and I think he's an excellent fit for the open Engineering role. I am going to move him to the next steps in the interview process.

It would be helpful for the following interview to drill into his technical experience. We weren't able to touch base on this during the initial conversation.

3. To delete a note, click Delete, then confirm this by selecting Delete Note
4. To edit a note, click Edit, update the content, then click Save Edits.

Statuses

Within the Candidate Tracker, the statuses for each application are used to track the different phases of the interview process.

Please note, the application status updates can not be automated with a Lever or Greenhouse integration.

For the partner selection, please see the complete list of application status listed below:

- Prospect
- Application Click through
- Confirmed Application
- Pipelined
- Highlights
- Interview
 - Interview
 - Digital
 - Phone
 - Tech assessment
 - Final Interview
- Offer
 - Offer extended
 - Offer declined
 - Offer Reneged
 - Offer Rescinded
- Candidate Withdraw
- Declined

Importantly, **Offer Declined** and **Offer Reneged** statuses are never visible to the candidate unless it is updated by you or someone in your organization. Additionally, the following statuses are never visible to the member at any time:

- Pipelined
- Highlighted
- Offer Extended
- Offer reneged
- Offer Rescinded

Within the Candidate Tracker, the statuses for each application are used to track the different phases of the interview process.

Please note, the application status updates will occur every 24 hours with a Lever or Greenhouse integration.

For the partner selection, please see the complete list of application status listed below:

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- Interview
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