

Getting Started with your Applicant Tracking System

Everything you need to know to post attractive jobs and hire great candidates

Welcome to your ATS (Applicant Tracking System)—your key to solving hiring pain points and attracting top applicants. Let's get started with a brief introduction to your new system. We think you'll appreciate the super intuitive, easy-to-use design that will help you get up and running quickly.

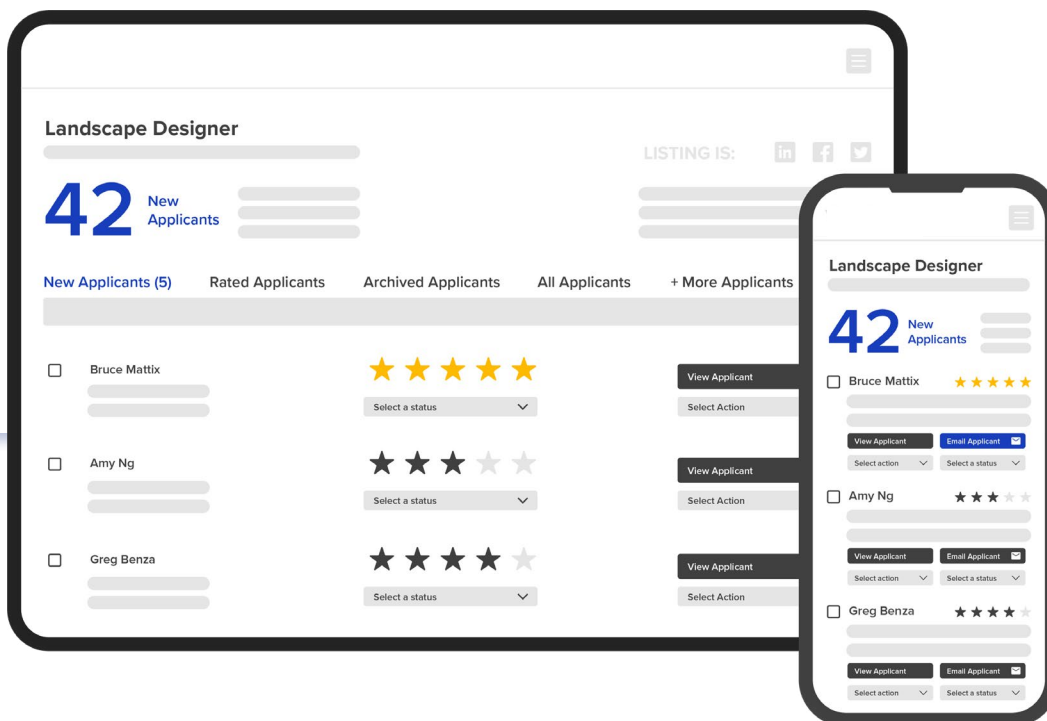
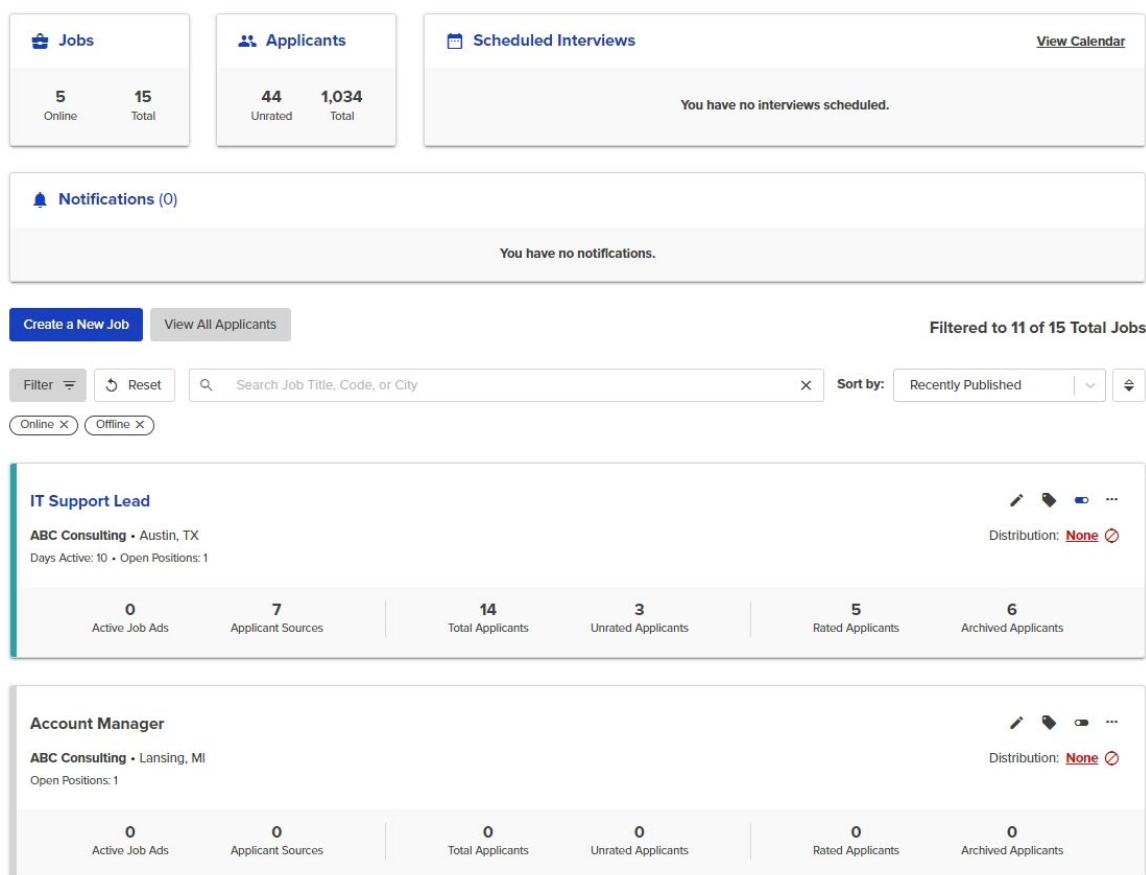


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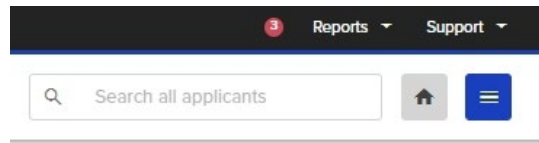
Main Dashboard

When you first log into your account, you will always start on the main jobs dashboard.



It's easy to view, at a glance, your upcoming interviews, high level analytics, messages and notifications, and, of course, your jobs, both offline and online, denoted by the colors to the left of the job (color=online; grey=offline). You can also view all candidates from across all jobs by clicking the **View All Applicants** button (more on applicants later) or by entering their name in the search field in the upper right.

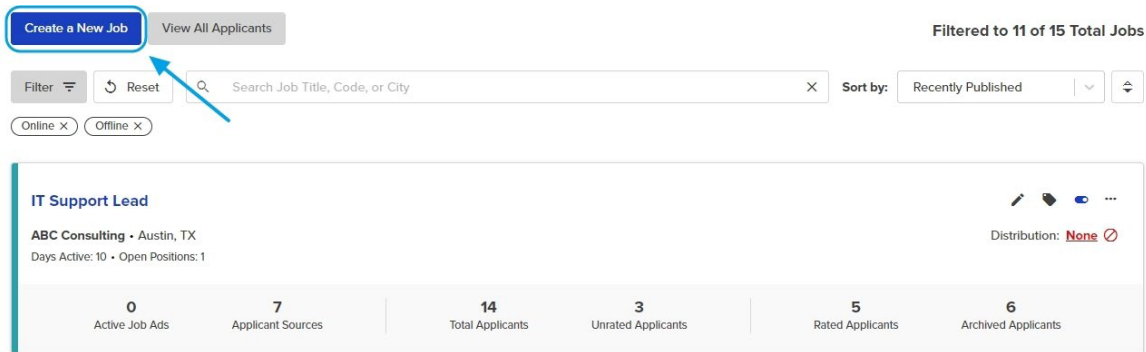
From this page, you can also effortlessly access additional reports, the Support team (we'll talk more about these amazing people), knowledge base articles and your main menu, the "hamburger menu" in the upper right corner of your ATS, which takes you to your Account Details, Calendar connector and more.



Create & Edit a Job

The two most important functions of an ATS are to [create a job](#) and [move applicants through your hiring process](#). Your ATS allows you to post automatically to [20+ free job boards](#) with a single click.

Creating your first job is as easy as clicking the “Create a New Job” button on the left side of your dashboard.



Once you’ve selected the Create a New Job button, you will be taken to your job creation page.

Your **Job Title** should be simple and standardized. This is your first impression to potential applicants—you want to ensure your job is both searchable and clickable. While “Customer Whisperer” might sound cool, applicants may not be inclined to enter that title in a search field, and instead, will be looking for Customer Support Manager or similar. The job title should reflect what would be listed on a business card.

The **Job Description** field is where the real magic happens. You've lured in top candidates with your perfect job title—now to entice them to apply. You can easily [upload templates](#) for quick job description creation, write one on the fly, or [use AI](#) to craft your description.

Best practices to keep in mind for job descriptions include thinking about the layout (simple formatting is best as some elaborate scripts won't translate to some job boards), adding branding, list the salary and benefits and more. Additional information and insights can be found in this article on [tips for increasing applicant traffic](#) as well as in our handy PDF guide that goes into even greater detail on the [ins and outs of applicant traffic](#) and how to make your jobs work for you.

The next fields in your job creation journey are fairly easy to understand. Fill in your [salary range](#), any **internal job codes** and [tags](#) that might be relevant, **location** (even [remote positions](#) require a location for job boards, and don't forget to check the **Remote** box) and add in **keywords** for easy sorting of top applicants.

Pay Rate in USD: ⓘ (optional)	Min	Max	Hourly
Tags: ⓘ (optional)	add tags		
Job Code: ⓘ (optional)			
Country:	United States of America		
Address: ⓘ (optional)			
City: ⓘ	Lansing		
State:	Michigan		
Zip code: ⓘ (optional)			
Remote:	☐		
Keyword Detect: ⓘ (comma delimited)			

Your [Advanced Options](#) menu will expand when you click the plus sign to the left of “Show Advanced Options” below the above fields. From here, you’ll be able to get even more granular with your job settings. Do you require resumes? You can toggle that permission ON here. Want to have your application form in another language? Easily done!

Show Location: ☒ ON
When off, job location will not appear on your job description or application form.

Show Remote Status: ☐ OFF
When off, remote status will not appear on your job description or application form.

Free Job Boards: ☐ OFF
If on, this job will be posted to free job boards. To increase the quality and quantity of your applicants, please purchase paid postings on additional job boards.

Hide Listing: ☐ OFF
Will not appear on your listings page but will be active, and your application form will be online and accessible by entering the URL directly. To opt out of distributing this job to free job boards, you must also toggle Free Job Boards to OFF.

Allow Duplicate Applicants: ☒ ON
If set to Off, applicants attempting to apply more than once to a position will get a notification that their application has already been received.

Allow Resume Uploads: ☒ ON
If set to Off, applicants will not be asked to upload a resume.

Require Resume Uploads: ☒ ON
If set to Off, applicants will be encouraged but not required to include a resume. This has no effect if resume uploads are disabled.

Allow Cover Letter Uploads: ☒ ON
If set to Off, applicants will not be asked to upload cover letters.

Require Cover Letter Uploads: ☐ OFF
If set to Off, applicants will be encouraged but not required to include a cover letter. This has no effect if cover letter uploads are disabled.

Allow Other File Uploads: ☒ ON
If set to Off, applicants will not be given the option to upload other files with their application.

Open Positions:
Enter the number of remaining open positions for this job.

Application Form Language:
Translate the application form to match the job description. [Contact us](#) for more language options.

Create Scorecard:
Scorecards allow you to create customizable text fields on all jobs which will appear in the applicant's review section who applies to that job. Add, remove, or reorder the titles.

[Create a Scorecard](#) at the job level or globally to help create consistency and eliminate bias in your interviews. You can enter qualities, specific questions or even projects on which all candidates can be scored as they are interviewed.



[Form Builder](#) houses your screening questions and can save you time in the long run when reviewing applicants. Use pre-built templates to instantly load screening questions relevant to positions for which you often hire. Or, create your own questions using text, essay, multiple choice, select one and yes/no formats. It's easy to make questions required for all applicants and then use those answers to both tag applicants with relevant information or archive them based on their response. Remember to save your changes! And don't forget to take advantage of automations in your ATS, like having the system archive applicants with specific responses and automatically send a Thanks but No Thanks message.

Form Builder: Customize Your Application Form

Customize the online application form that applicants see when they apply online. You can add customized questions and include your own rules for automatically managing applicants.

- Ask essay questions about applicant experience.
- Screen whether applicants have required certifications.
- Find out which shifts an applicant is available.
- and more!

Need to collect address? Enable address fields on your application forms in your Application Settings

A preview of an application form titled "All forms include Name, Email, Phone and File Upload fields". It contains input fields for "First Name:", "Last Name:", "Email:", and "Phone:". Below these are two "Browse..." buttons for "Upload Cover Letter:" and "Upload Resume:".The Form Builder interface for creating a question. At the top, there are tabs for "Available Templates" and "Create a Template", and a dropdown for "Copy questions from: Available Jobs". Below this is a row of question type icons: Text, Essay, Multiple Choice, Select One, Yes/No, Date, Employment History, Education History, and Sub-Header. The "Text" icon is selected. The main area is titled "Enter your question below:" and contains a text input field with the question "Do you have a driver's license?". To the right, under "Customize Question: Optional configuration settings", there are checkboxes for "Make question required for applicants?" (checked), "Archive if applicant chooses:" (checked), and "Enable auto tagging if applicant chooses:" (checked). Below these are dropdown menus for "No" and "Yes". At the bottom, there is a field "add these tags:" with a tag "DL" and an "add tags" button. At the bottom right are "Save Changes" and "Close" buttons. At the bottom left are "Finished" and "Back To Job" buttons. A footer link says "Need help? Check out the tutorial."

Once your Form Builder questions are set, you are ready for the final step in the job creation process. Choose the best, personally-tailored message to automatically send applicants when they've applied. For those applicants who have opted

into receiving text messages, the system will be able to use the pre-built SMS templates. Once selected, you can then add additional hiring managers, if needed, for the position. And then, you're finally ready to publish your job by clicking the Publish and Continue button! Your ATS will send your new job ad out to 20+ job boards with that single click and you'll have the option to advertise your post for improved visibility (see next section).

If you aren't ready to publish your job, you can opt to Save as Draft. The job will then be saved in an offline state until you are ready to move forward.

Access & Notifications

Email Confirmation:

SMS Confirmation:

Select which confirmation is sent to applicants. You can also add new templates, or disable confirmations.

Hiring manager(s):

Select which managers can view these applicants. Click one or more names to add them to the list. If a user is not in this list, please add them here.

[Publish and Continue >>](#) [Save as Draft](#) [Cancel](#)

Advertising Your Job: Your advantage in the market

Upon publishing your job to the free boards, you'll be taken directly to the shopping cart where you can load up with opportunities to increase your job ad visibility and draw in higher quality candidates with [paid posts](#).

Boards are filterable to help you locate the best job boards and audience for your role. Filter by name, price, previously purchased, or specialties.

Once filtered, click **"Add"** on any job board of interest. Once you've loaded up your shopping cart, simply select the **cart icon** in the upper right and **"Checkout"** to be taken to the

The image shows a 'Filter' sidebar on the left and a main content area on the right. The sidebar includes a 'Reset' button, a search bar, and sections for 'Minimum Price', 'Maximum Price', 'Premium' (with a checkbox for 'Show Premium Job Boards'), 'Previously Purchased' (with a checkbox for 'Show Previously Purchased Job Boards'), and 'Specialties' (with checkboxes for Automotive, Diversity, Education, Finance, Food Service & Hospitality, Free, and Industrial & Logistics). The main content area shows a job board listing for 'Chief Representative' with a 'View Job Online' link, social media icons, and a 'Post to Job Boards' section. Below this is a 'Reports' section and a 'LinkedIn Daily' advertisement for \$19/day with an 'Add' button.

next screen where you will be prompted to fill in additional information for your purchase/s. Each board will have its own required fields in order to complete your purchase. Once complete, you'll have an opportunity to **Review Final Summary** where you can see the total purchase price before clicking the final button, **Purchase Postings**, to boost your job.

Your Applicant Dashboard

Your Applicant Dashboard is your candidate hub. While you can look at a view of all applicants for all jobs by clicking View All Applicants from your main dashboard, it's far more helpful to click on a specific job and view applicants specific to that role.

The screenshot shows the 'IT Support Lead' job page. At the top, there's a header with the job title, a 'View Job Online' link, and a 'Manage Job' button. Below this is a summary section with a large blue box containing the number '3' and the text 'New Applicants'. To the right of this box are statistics: '5 Rated Applicants', '6 Archived Applicants', '14 Total Applicants', and '0 Hired Applicants'. Further right is a box with job details: 'Company / ABC Consulting', 'Location / Austin, TX', 'Hiring / Jess Tejan', 'Posted / 2023-10-10', 'Updated / 2023-10-10', and 'Open Positions / 1'. Below the summary is a tabbed interface with four tabs: 'New Applicants' (selected), 'Rated Applicants', 'Archived Applicants', and 'All Applicants'. There is also a '+ More Candidates' link. Above the tabs is a search bar and filters for 'select ratings', 'select status', and 'select tags'. Below the tabs is a list of applicants. Two applicants are shown: Chris Villegas and Jane Jones. Each applicant entry includes their name, contact information (phone, email), application date, source, average rating (5 stars), a status dropdown menu, a 'View Applicant' button, and a 'select action' dropdown menu.

IT Support Lead

[View Job Online.](#)

3 New Applicants

5 Rated Applicants
6 Archived Applicants
14 Total Applicants
0 Hired Applicants

Company / ABC Consulting
Location / Austin, TX
Hiring / Jess Tejan
Posted / 2023-10-10
Updated / 2023-10-10
Open Positions / 1

New Applicants Rated Applicants Archived Applicants All Applicants More Candidates

select action select ratings select status select tags Apply

☐ select all (3) sort by: status date

☐ Chris Villegas
phone: +1 (810) 654 9503
email: chrisv23@noemail.com
applied: 10/11/23
source: Craigslist
avg rating: ★★★★★
-- select a status --
3-4 years of experience
 View Applicant
select action

☐ Jane Jones
phone: +1 (847) 456 7654
email: janejones@noemail.com
applied: 10/11/23
source: Monster.com
avg rating: ★★★★★
-- select a status --
3-4 years of experience
 View Applicant
select action

Candidates are grouped into four tabs:

- **New:** All unrated applicants
- **Rated:** Applicants are moved here once rated.
- **Archived:** Just like it sounds! All archived applicants can be found here.
- **All:** No matter their status, all applicants will be under this category.

It's easy to view a single applicant from your dashboard, or filter for specific ratings, statuses and tags to find those you need the most. And you can perform bulk actions like archiving, sending messages or updating for up to 300 applicants at a time by selecting the box on the upper left of the applicant grid, or manually choosing your preferred candidates. Once selected, choose Select Action for your desired update.

Let's dive more deeply into applicants, though, and view a single Applicant Profile.

Applicant Profiles: Interact with your Candidates

The applicant profile is your home for all the information regarding your specific applicant, from resumes, cover letters and Form Builder responses to messages, documents and personal information.

The screenshot shows the applicant profile for Brenda Williams. At the top, there's a header with the name 'Brenda Williams' and an 'x' icon. Below this is a row with an 'avg rating' of five stars and a 'Schedule phone interview' button. A navigation bar contains buttons for 'Messages', 'Share', 'Verify', 'Send Offer', and 'Mark as Hired'. To the right of these are icons for various actions and an 'auto next' checkbox. On the left is a sidebar menu with options: 'Applicant Info' (selected), 'Reviews', 'Cover Letter', 'Resume', 'Questions', 'Files', 'Restricted Files', 'Notes', and 'Activity'. The main content area is divided into sections: 'Personal Info' with fields for Phone, Email, Address, Received date, Position, and Source; 'Job Roles' with an 'RDO' field; and 'Tags' with a dropdown menu showing '5-6 years of experience'. A note at the bottom explains that tags help categorize, sort, and manage applicants.

Personal Info	
Phone:	+1 (555) 555 6555
Email:	brendaw@noemail.com
Address:	123 W. Main ST. Missoula, MT 59801 US
Received:	10/09/23
Position:	IT Support Lead, Austin, TX
Source:	Other: LinkedIn

Job Roles
RDO

Tags
5-6 years of experience

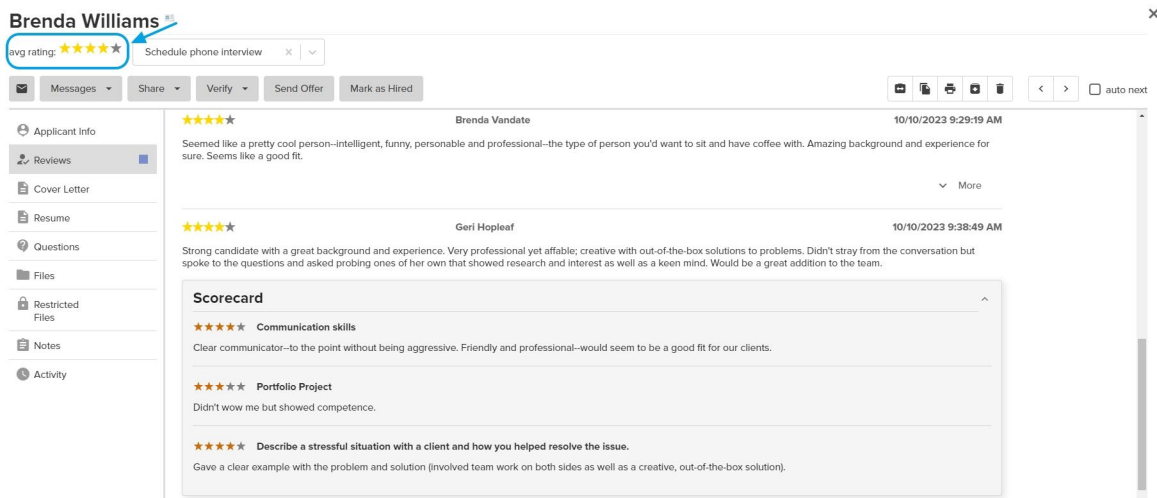
Tags help you categorize, sort and manage your applicants. Enter a word or phrase and hit **tab** or **enter** to add it to this applicant.

To communicate with your applicants, you have a number of options. If your candidate chose SMS as their preferred form of communication on their application, you will be able to send email and text messages. All message history will be housed and easily accessed through the 'envelope' icon in the upper left. To get started, simply click the Messages dropdown and select the type of message you wish to send.

- **Message to Applicant:** allows you to take advantage of your message template to send your preferred message via either SMS or email. Files can easily be uploaded to your message.
- **Thanks but No Thanks:** useful for when you have opted to move forward with other candidates. You can select a template here to use or write a more personal message on the fly. Files can easily be uploaded here too.

- **Interview Request:** Send interview requests to candidates by selecting this option and allowing your candidates to [choose their own time](#) (with your [connected calendar](#)) or specify a specific time and date for the interview. Add a templated or custom message to the invitation, add files and click Send.
- **Send Form to Manager:** Provide a note and send a form to a manager to solicit additional information or feedback regarding your candidate.
- **Send Documents:** Need documents to be signed by your applicant? Use this option to create documents or upload saved ones to send to applicants. Documents will be available in your Files tab once signed.

Rating your applicants provides greater insight into those top candidates that are the most ideal for your role. [Add your reviews along with ratings](#) for each scorecard question or quality to provide a holistic view of candidates. Once two reviews have been recorded the stars under the candidate name will populate with an average rating (scorecard reviews are not included in the overall ratings). Other's reviews will remain hidden until you enter your own in an effort to decrease bias.



Move applicants through your workflow easily by adjusting the status in the dropdown menu below the applicant's name to reflect the [stage in your process](#) in which your applicant has moved.

Getting ready to make an offer? Use the **Verify** tab to send [reference or background checks](#) or assessments you might have integrated into your ATS account.

When you've found your new hire, **Send Offer** will allow you to [create an offer letter](#) with all relevant information, including documents requiring signatures, onboarding packages and more. Use a templated offer letter message or compose one in the moment for a more personalized letter. The Offer Letter wizard will walk you through the steps to ensure the successful completion of your offer letter.

And lastly, when your candidate has accepted the offer, you can use the [Mark as Hired](#) button to denote their new status. And, if you have an integration in place, selecting this option will send necessary information to your HRIS for Onboarding next steps.

Reports: Get metrics quickly

Access the data most important to you from the [Reports menu](#) in the upper right of your ATS. View graphic representations of your applicant metrics such as time to hire, total applicants, trends and statuses in the **Applicants** tab; or download reports in .csv format from the **Downloads** tab. Most of the reports here can be filtered in the ATS but you also have full control over information most relevant to you in the .csv spreadsheets.

Support—You aren't alone!

Good news! Even though the ATS is intuitive and easy to use, we know questions will arise. If you are a self-starter, our knowledge base of handy articles and walk-throughs can be found in the **Support Database** menu option under **Support** in the upper right of your ATS.

Use the **Live Chat** feature for quick responses to questions you have now. No chatbots here—our Support team is on hand to answer those burning questions and get you back on track.

Have a more complicated issue? No problem! Easily submit a ticket through the **Submit Support Ticket** option and our team will get back to you as soon as possible.

Hopefully you're feeling better about getting started on your new ATS now. The best way to learn any software is to get in there and get your hands dirty, so to speak. Click on the handy question mark icons sprinkled throughout the ATS for helpful advice and best practices. Dig into your Account Details to set backend global Admin settings, upload your [message](#), [offer letter](#), [job description](#), [document](#) and [Form Builder templates](#), [customize your careers page](#), set your [workflows](#) and more. [Connect your calendar](#) to make scheduling interviews easier with your applicants. Or try the tasks outlined in the [Practice Guide for New Users](#). And again, don't forget that you aren't alone—you have a team ready to help you and make this an easy process.

Jump in there and good luck! Happy hiring!