Link Candidates to the Pipeline

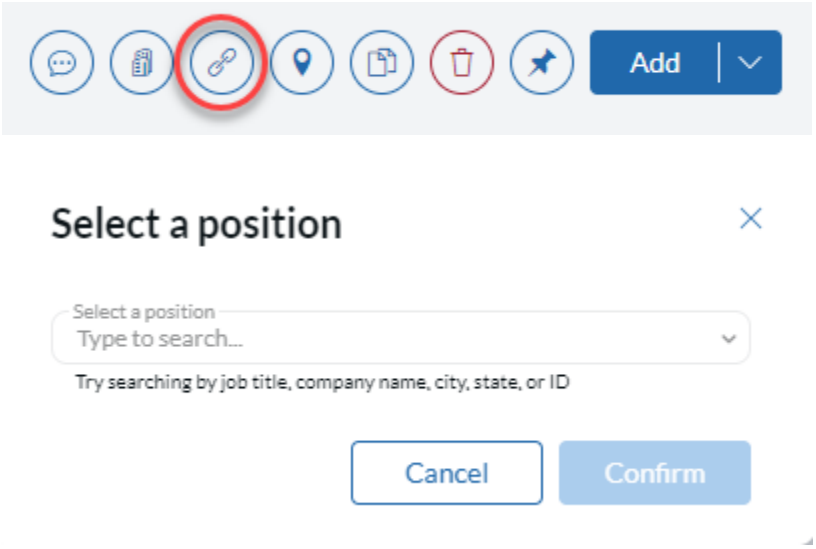
Pipeline · https://learnpcr.pcrecruiter.net/site/docs/pipeline/link-candidates-to-the-pipeline/

Linking Candidates to the Pipeline

Once a Candidate has been identified as a potential Candidate for a position, you will want to link them to the Pipeline for that Position.

Individually from a Name Record

1. Select **Name** from the Main Toolbar.
2. Select a **Name** from the Recently Viewed or select a Name from a Search Result List.
3. Choose **Link to Position** from the Quick Action buttons at the top right of the record.
4. Search for a Position Record using the Job Title, Company Name, City/State, or Job ID
   - Note the Search bar will display recent Position Records when clicking into the search bar
5. Click the **Confirm** button and the Candidate will be linked to the Position and land in the inbox of the Position's Pipeline.



From a Name Search Result Screen

One way to Link multiple Name Records to a Pipeline is via a Name Search Result List

1. Select **Name** from the Main Toolbar.
2. Enter your search criteria and click **Search**.
3. Place **check marks** in the boxes to the left of the Names you wish to Link.
4. Click **Link to Position** in the bottom right of the screen.
5. The selection dialog window will appear, **choose the position** you wish to link following the same steps as when Linking an individual Name.
6. Click **Confirm** and the Candidate will be linked to the Position Record and land in the inbox of the Position's Pipeline.



From a Rollup List

Linking to a Pipeline from a Rollup List is very similar to Linking from the Search Results. Be sure to have a Rollup List created to follow these steps.

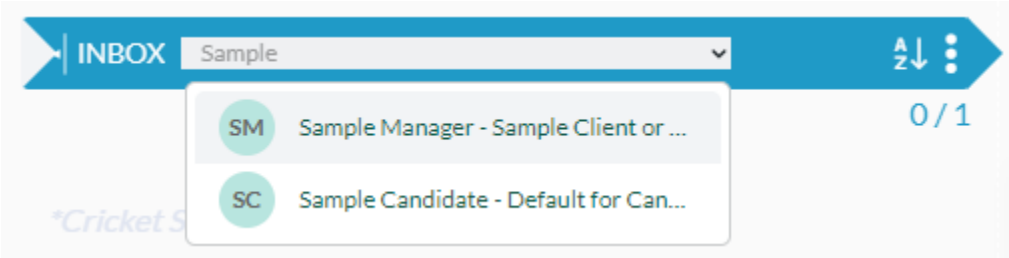
1. Select **Rollups** from the Main Toolbar.
2. Select the **Rollup List** you wish to Link Names from.
3. Place **check marks** in the boxes to the left of the Names you wish to Link.
4. Choose the **Link to Position** option from the Action Menu at the bottom of your screen.
5. The selection dialog window will appear, **choose the position** you wish to link following the same steps as when Linking an individual Name.
6. A confirmation screen will appear once all Names have been Linked. If any of the Names were already Linked to the Pipeline, they will be skipped.

From the Pipeline

While working in the Pipeline itself, you can use the search box on the Inbox column to find and add candidates by name.

1. Select **Position** from the Main Toolbar.
2. Click **Pipeline** in the navigation menu on the Position.

3. Expand the **Inbox** column, if not already expanded.
4. Begin typing the **First and/or Last Name** of the desired candidate into the "Search To Add To Pipeline" box.
5. When the desired candidate appears, select them from the result dropdown to add them to the Pipeline Inbox.



From Pinned Records

Records can be pinned from anywhere in the database. Once they have been pinned they can be linked to a position by clicking the pushpin icon, clicking on the 3 vertical dots, and selecting Link to Position from the action dropdown.

