Add to Rollup Based on Answer

Adding to a Rollup Based on Answer

The record can be added to a Rollup based on the entry or selection of a pre-defined answer. For example, if your questions asks the person to select their job function from a list of options, they can be added to the Rollup you have created to group these types of individuals. There are two ways in which this can be accomplished.

- **Option 1:** embed code with the answer. This is the recommended method since you can route the candidate to different rollups based on each answer selected. You'll first need to find the Rollup Id Code. This can be found in Advanced Name Search by using the search by name rollup. When you select the rollup name, a Rollup ID (rather than the rollup name) is displayed. You'll use this code for the rollup mapping. When setting up the answer, put the rollup code within double brackets, followed by 2 exclamation marks, then the answer option to be visible. The exclamation marks and preceding text are not visible.
  - [[ADMIN.0029]]!!Accounting/Finance
  - To also save a value with the answer (for example, to use it as the Matched Answer), put the value between the brackets and the exclamation marks: [[ADMIN.0029]]ACCT!!Accounting/Finance

- **Option 2:** enter the answer in the 'Matched Answer' box, set the dropdown next to it to 'Desired', and choose a list in the 'Rollup Trigger' field. The Rollup Trigger is disabled unless the dropdown is set to Desired (it starts at '(Please Select)'). You can enter a comma-separated list of answers, but all of them add the record to the same list.

PCRecruiter also provides automation plans for profiles based on a successful or knockout completion of the profile form. The Automation Plan for profiles option will allow you to put the name on a rollup list upon completing the form, along with other defined actions.

Answer coding can only add records to lists. To remove records from lists when the form is submitted, use the profile's ‘Remove From Rollup(s) on Submit’ setting under On Completion Settings.