

Beyond - How to Track Candidates on an Order

Last Modified on 09/18/2025 9:46 pm CDT

What is the Candidates Tab?

The Job Order's candidate tab is used to track employees who are being considered for a position. It is a way to associate an employee with an order without making an assignment. Within this area, you can track statuses and log candidate information without ever leaving the job order record. As a candidate's relationship to the order changes, messages will be posted for you.

1. [Adding Employees to the Candidates Tab](#)
 2. [Managing Candidate Information](#)
-

Adding Employees to the Candidates Tab

There are four ways an employee can be added as a candidate to a job order record:

1. [Adding them directly to the candidates tab on the order](#)
2. [Adding them from an employee search](#)
3. [Adding them directly from the employees candidacy sub-tab](#)
4. The employee could add themselves to a job order by applying on the [Job Board](#) or via [Buzz](#)

Note Employees that add themselves to a job order will be placed as 'WCandidate.' This will help you differentiate those a service rep considers a candidate and those that would like to be considered a candidate.

Adding from the Candidates Tab

To add an employee as a candidate, navigate to the Job Order record and then to the 'Candidates' tab:

<input type="checkbox"/>	Employee	Resume	Email Address	Primary Phone	Status	Interest Code M...	Submitted By	Date Job Receipt Email Queued	Job Receipt Email Queued
<input type="checkbox"/>	Lando Norris Refused on Jun 10, 2025		lando@fl.xom	(612) 838-2929	Refused	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Toah Barber Placed on Jun 10, 2025		toah.barber@zip.xom		Placed	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Gloria Delgado Candidate on Jun 10, 202		Carmel@aol.com		Candidate	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Greg Garret Candidate on Jun 10, 202				Candidate	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Terrence White Candidate on Jun 10, 202		imapdummysaccount--		Candidate	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Nick Jackson Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Jared Lusk Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Kenny Omega Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Molly Ringwald Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Jack Bayer Candidate on Jun 10, 202		dalyce@tempworks.c--		Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Janet Billings Candidate on Jun 10, 202		imapdummysaccount--		Candidate	25%	Matt Schwalbach		<input type="checkbox"/>

In the area below, current candidates for the order can be viewed.

Select the "+ Add New Candidate" button to add a new candidate.

This will open a new wizard allowing you to search for the desired employee by an employee's first and last name, Social Security Number, or employee Id:

Add New Candidate - Enter Candidate Information

1 Enter Candidate Information — 2 Assignment Restrictions

Add Candidates To Job Order:

Peppermint Twisty - Primary
Unknown: 0 of 1 positions filled

Please use the search to find candidates to add:

* Required

Last Name First Name Govt ID Id

Once an employee has been selected, the system will check for any applicable assignment restrictions. Keep in

mind at this point the employee is merely being considered as a candidate and **will not actually be placed** on assignment.

These restrictions represent things that the employee record will need before being "assigned." The option to approve the restrictions appears as a check box for the Employee.

If the employee is actually assigned, **the same restrictions will populate again.**

Note For more on assignment restrictions: [Beyond- How to Create Assignment Restrictions.](#)

Add New Candidate - Assignment Restrictions

✓ Enter Candidate Information 2 Assignment Restrictions

Add Candidates To Job Order:

 Peppermint Twisty - Primary
Unknown: 0 of 1 positions filled

Approve All Allowed Candidates

 Harper Backstrom (4295004563) Approve Restrictions For This Employee

Assignment Restrictions

-  Employee I9 has not been received.
[Backstrom, Harper](#)
-  Employee is missing an applicable COVID Related Required Document: COVID Vaccine Series, COVID Neg Test Result, COVID Proof of Booster, COVID Medical Exemption, COVID Religious Exemption
[Backstrom, Harper](#)

CANCEL < PREVIOUS [SUBMIT 1 CANDIDATE](#)

Adding Candidates from Search Results

Candidates can also be added to job orders from the results of an Employee search.

Typically, candidates are selected as a result of an Advanced Search. For more on searching: [Beyond - Advanced Searching.](#) After conducting a search, results will be view-able in the bottom portion of the screen:

BASIC ADVANCED

Click to select a saved search...

NOT **AND** OR

> Is Active IS TRUE Show in results

> Interest Codes / Skills EQUALS Forklift Operator

> Zip Code CONTAINS 55121 Show in results

+ RULE / GROUP

SAVE... SEARCH RESET

10 results

Advanced Search Criteria: Interest Codes / Skills, Is Active, Zip Code

<input type="checkbox"/>	Employee Id	Last Name ¹	First Name ²	Branch	Phone	Cell Phone	Email	Is Active	Is Assigned	Last Message	Zip Code
<input type="checkbox"/>	4295015070	Arnett	Julie	Minneapolis	6511121212		susan@tempworks.c...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Message	55121
<input type="checkbox"/>	11971	Barker	Roberto	Minneapolis	(651) 068-0068x123		shaha403@yahoo.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Buzz Offered	55121
<input type="checkbox"/>	4295082456	Clark	Taylor	Eagan	664-245-5878	465-464-4612	tdark@jobsearch.xom	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Accepted	55121-222
<input type="checkbox"/>	4295038090	Franklin	Walt	Minneapolis	651-885-8845		susan@tempworks.c...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order Candidate	55121

Check the box next to each employee you would like to add as a candidate. Use the top checkbox to select all:

SELECT ALL ACTIONS

Advanced Search Criteria: Interest Codes / Skills, Is Active, Zip Code

<input checked="" type="checkbox"/>	Employee Id	Last Name ¹	First Name ²	Branch	Phone	Cell Phone	Email	Is Active	Is Assigned	Last Message	Zip Code
<input checked="" type="checkbox"/>	4295015070	Arnett	Julie	Minneapolis	6511121212		susan@tempworks.c...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Message	55121
<input checked="" type="checkbox"/>	11971	Barker	Roberto	Minneapolis	(651) 068-0068x123		shaha403@yahoo.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Buzz Offered	55121
<input type="checkbox"/>	4295082456	Clark	Taylor	Eagan	664-245-5878	465-464-4612	tdark@jobsearch.xom	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Accepted	55121-222

Select the "Actions" dropdown button and select "Make Candidates":

- Email 2 Recipients
- Log Message for 2 Recipients >
- Make Candidates**
- Make Job Offers
- Assign
- Add to Hotlist
- Merge Record
Select up to 2 records to merge

Onboarding

Assign a New Workflow...
Assign a pre-configured workflow and optionally set the starting step or additional pages.

Assign Pages Ad Hoc...
Assign a manually-specified set of pages that are separate from existing workflows.

This will open the 'Add New Candidate' wizard. In the area below, the selected Employees can be viewed:

Add New Candidate

1 Enter Candidate Information

2 Assignment Restrictions

Job Order

Bucky's Shipping - Primary: Accountant

Employee:



Julie Arnett (4295015070)

Employee:



Roberto Barker (11971)

CANCEL NEXT >

Select the Job Order you would like to place the candidates on by interacting with the Job Order drop-down: (the drop down will contain the last orders you looked at).

Select 'Next' to view any assignment restrictions for the placement of these potential candidates. Keep in mind that Employees are being made candidates and not being assigned to the Job Order:

Add New Candidate

✓ Enter Candidate Information

2 Assignment Restrictions

3 Assign

Add Candidates To Job Order:



Bucky's Shipping - Primary
Accountant: 1 of 1 positions filled

Approve All Allowed Candidates



Julie Arnett (4295015070)

Approve Restrictions For This Employee

Assignment Restrictions



Employee I9 is expired.

[Arnett, Julie](#)



Missing document: 5 Panel Drug Test

[Arnett, Julie](#)



The employee is missing the following interest code: CPA

[Arnett, Julie](#)



Employee is missing an applicable COVID Related Required Document: COVID Vaccine Series, COVID Neg Test Result, COVID Proof of Booster, COVID Medical Exemption, COVID Religious Exemption

[Arnett, Julie](#)



Roberto Barker (11971)

Approve Restrictions For This Employee

Assignment Restrictions



Missing document: 5 Panel Drug Test

[Barker, Roberto](#)



The employee is missing the following interest code: CPA

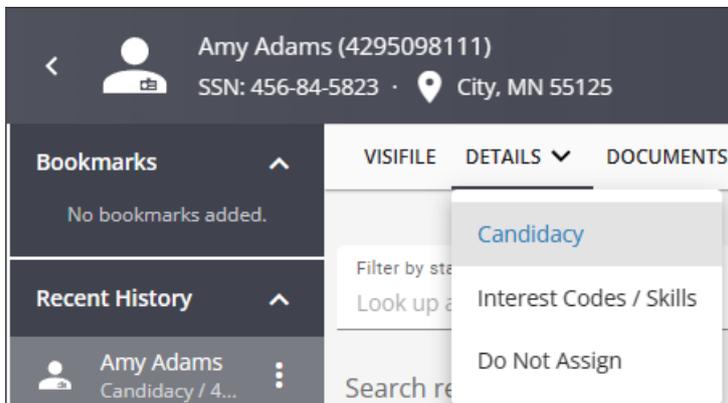
[Barker, Roberto](#)

CANCEL < PREVIOUS NEXT >

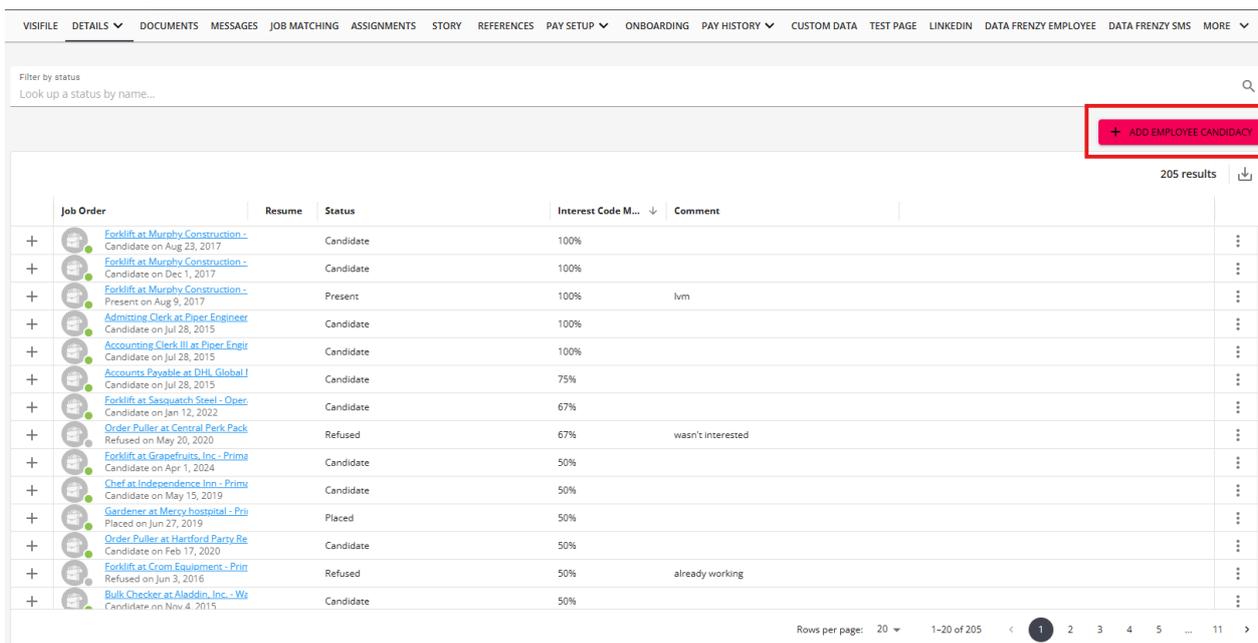
Once submitted, employees will be shown under the candidates tab on the order record.

Tracking and Adding Directly to an Employee's Candidacy

An employee's individual candidacy history can be tracked and added to by viewing their employee record and selecting the 'Candidacy' sub tab under the 'Details' tab:



To add an Employee to a Job Order as a candidate, select the "+ Add Employee Candidacy" button:



The last viewed Job Order will be displayed in the 'Add Employee Candidacy' wizard. Alternatively, another Job Order can be searched for and selected by using the look-up tools:

Add Employee Candidacy

1 Enter Candidacy Information 2 Assignment Restrictions

Creating Candidacy For Employee:

 Julie Arnett (4295015070)

Please use the search to find a job order:

Customer Name Job Order Id Status Filled 

Search returned 1 result 

	Job Order Id	Job Title	Customer	Department	Positions Requir...	Positions Filled
	4295147829	Accountant	Bucky's Shipping	Primary	1	1

Rows per page: 10 1 of 1 1

SAVE AS DRAFT CANCEL SUBMIT

Once submitted, the system will look for any applicable assignment restrictions. Some assignment restrictions can be approved by the recruiter but will be displayed again when it comes time to assign them:

Add Employee Candidacy

Enter Candidacy Information 2 Assignment Restrictions

Approve All Assignment Restrictions

Assignment Restrictions

-  Employee I9 is expired. [Arnett, Julie](#)
-  Missing document: 5 Panel Drug Test [Arnett, Julie](#)
-  The employee is missing the following interest code: CPA [Arnett, Julie](#)
-  Employee is missing an applicable COVID Related Required Document: COVID Vaccine Series, COVID Neg Test Result, COVID Proof of Booster, COVID Medical Exemption, COVID Religious Exemption [Arnett, Julie](#)

SAVE AS DRAFT CANCEL < PREVIOUS SUBMIT

Note To learn more about assignment restrictions, see [Beyond - Assignment Restrictions](#).

Once approved and submitted, the employee will be added to the Candidates section on the order.

Managing Candidates

Once candidates have been placed on an order, it is important to manage their relationship with the order. Is your candidate being considered? Have they been rejected? Why? Are they ready to have an interview scheduled. All of this can be managed from this tab.

Any update to a candidate's status will be logged automatically on the Job Order and Employee records as a message.

An employee's candidacy will display vital contact methods as well as any recent comments about their record

VISIFILE DETAILS CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA ASSIGNMENTS DF:JOB ORDER									
Filter by status Look up a status by name...									
+ ADD NEW CANDIDATE									
13 results									
<input type="checkbox"/>	Employee	Resume	Email Address	Primary Phone	Status	Interest Code M... ↓	Submitted By	Date Job Receipt Email Queued	Job Receipt Email Queu
<input type="checkbox"/>	+ Lando Norris Refused on Jun 10, 2025		lando@f.xom	(612) 838-2929	Refused	50%	Matt Schwalbach		
<input type="checkbox"/>	+ Teah Barber Placed on Jun 10, 2025		teah.barber@zip.xom		Placed	50%	Matt Schwalbach		
<input type="checkbox"/>	+ Gloria Delgado Candidate on Jun 10, 202		Carmel@aol.com		Candidate	50%	Matt Schwalbach		
<input type="checkbox"/>	+ Greg Garret Candidate on Jun 10, 202				Candidate	50%	Matt Schwalbach		
<input type="checkbox"/>	+ Terrence White Candidate on Jun 10, 202		imadummyaccount--		Candidate	50%	Matt Schwalbach		
<input type="checkbox"/>	+ Nick Jackson Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		
<input type="checkbox"/>	+ Jared Lusk Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		
<input type="checkbox"/>	+ Kenny Omega Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		
<input type="checkbox"/>	+ Molly Ringwald Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		
<input type="checkbox"/>	+ Jack Bauer Candidate on Jun 10, 202		dalyce@tempworks.c--		Candidate	25%	Matt Schwalbach		
<input type="checkbox"/>	+ Janet Billings Candidate on Jun 10, 202		imadummyaccount--		Candidate	25%	Matt Schwalbach		
<input type="checkbox"/>	+ Julie Arnett Candidate on Sep 12, 20,		susan@tempworks.c--		Candidate	0%	joshua.kramer		
<input type="checkbox"/>	+ Roberto Barker Candidate on Sep 12, 20,		staha403@yahoo.com		Candidate	0%	joshua.kramer		

Candidate List Rankings

In the Candidates section on the order, there is a column titled: Interest Code Match %. This column will display the % of matching interest codes each employee has with the order. This can be an easy way to identify which candidates are the most qualified at a glance.

In order for this option to work you will need to be utilizing interest codes on the employee and order records. Interest codes on the order do not have to be set as "required" for them to count towards the interest code match option.

For more information on how to add interest codes check out:

- [Beyond - How to Create an Order](#)
- [Beyond - Managing Employee Interest Codes](#)

To Update a Candidate's Status

1. Navigate to the Candidates section of the order
2. Select the icon to the right of candidate you wish to update & select Edit
3. Alternatively, you can select multiple candidates to have their status updated at the same time by selecting

the checkbox to the left of the candidate(s) within the list, selecting the dropdown that states "# selected items" and finally selecting "Status Update".

4. A new window will pop up, select the new status and enter any comments you would like included
 - Changing the status will log a message on the employee and order records
 - Statuses available in your system are determined by your administration. See [Drop Downs](#) for more information on updating candidate statuses.
5. Select Submit to save your changes

Candidate Pam Halpert

* Status
Candidate ▼

Comment

SAVE AS DRAFT CANCEL SUBMIT

Inactive Candidates

Candidates that receive a status update that negatively affects their relationship to this order will be considered an inactive candidate (but only with regards to the respective order). Those that are inactive will have a grey activation charm beside their status in this area:

▼		Christopher Robin BuzzCancel on Aug 8, 2019	(456) 789-1250	33%	BuzzCancel	⋮
---	---	---	----------------	-----	------------	---

Candidate Status Filters

If you want to hide candidates that are in a certain status, you can use the candidate filter to select only the candidate statuses you wish to see:

VISIFILE DETAILS CANDIDATES CANDIDATE MATCHING DOCUMENTS MESSAGES CUSTOM DATA ASSIGNMENTS DF:JOB ORDER									
Filter by status Look up a status by name...									
+ ADD NEW CANDIDATE									
13 results									
<input type="checkbox"/>	Employee	Resume	Email Address	Primary Phone	Status	Interest Code M...	Submitted By	Date Job Receipt Email Queued	Job Receipt Email Queu
<input type="checkbox"/>	Lando Norris Refused on Jun 10, 2025		lando@fi.xom	(612) 838-2929	Refused	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Teah Barber Placed on Jun 10, 2025		teah.barber@zip.xom		Placed	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Gloria Delgado Candidate on Jun 10, 202		Carmel@aol.com		Candidate	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Greg Garret Candidate on Jun 10, 202				Candidate	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Terrence White Candidate on Jun 10, 202		imaedummyaccount--		Candidate	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Nick Jackson Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Jared Lusk Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Kenny Omega Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Molly Ringwald Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Jack Bauer Candidate on Jun 10, 202		dalyce@semworks.c-		Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Janet Billings Candidate on Jun 10, 202		imaedummyaccount--		Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Julie Arnett Candidate on Sep 12, 201		susan@semworks.c-		Candidate	0%	joshua.kramer		<input type="checkbox"/>
<input type="checkbox"/>	Roberto Barker Candidate on Sep 12, 201		shaha403@yahoo.com		Candidate	0%	joshua.kramer		<input type="checkbox"/>

Creating Resumes for Candidates

Once candidates have been added to the job order record, they can have resumes created for them.

1. Navigate to the Candidates section of the job order
2. Select the  icon to the right of candidate you wish to update & select the "Create Resume" option:

SELECT ALL ACTIONS									
<input type="checkbox"/>	Employee	Resume	Email Address	Primary Phone	Status	Interest Code M...	Submitted By	Date Job Receipt Email Queued	Job Receipt Email Queu
<input type="checkbox"/>	Lando Norris Refused on Jun 10, 2025		lando@fi.xom	(612) 838-2929	Refused	50%	Matt Schwalbach		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Teah Barber Placed on Jun 10, 2025		teah.barber@zip.xom		Placed	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Gloria Delgado Candidate on Jun 10, 202		Carmel@aol.com		Candidate	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Greg Garret Candidate on Jun 10, 202				Candidate	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Terrence White Candidate on Jun 10, 202		imaedummyaccount--		Candidate	50%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Nick Jackson Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Jared Lusk Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Kenny Omega Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Molly Ringwald Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		<input type="checkbox"/>
<input type="checkbox"/>	Jack Bauer Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach		<input type="checkbox"/>

-  Assign
-  Offer
-  Create Resume
-  Edit
-  Delete
-  Sync To Sense
-  Email Job Receipt to Candidate

3. Alternatively, you can create resumes for multiple candidates at the same time by selecting the checkbox to the left of the candidate(s) within the list, selecting the "Actions" dropdown, and finally selecting "Create Resume":

SELECT ALL ACTIONS									
<input type="checkbox"/>	Emp	Email Address	Primary Phone	Status	Interest Code M...	Submitted By	Date Job Receipt Email Queued	Job Receipt Email Queu	
<input type="checkbox"/>	Lando Norris Refused on Jun 10, 2025	lando@fi.xom	(612) 838-2929	Refused	50%	Matt Schwalbach		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Teah Barber Placed on Jun 10, 2025	teah.barber@zip.xom		Placed	50%	Matt Schwalbach		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Gloria Delgado Candidate on Jun 10, 202	Carmel@aol.com		Candidate	50%	Matt Schwalbach		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Terrence White Candidate on Jun 10, 202	imaedummyaccount--		Candidate	50%	Matt Schwalbach		<input type="checkbox"/>	
<input type="checkbox"/>	Jack Bauer Candidate on Jun 10, 202			Candidate	25%	Matt Schwalbach		<input type="checkbox"/>	

-  Assign
-  Create Resume
-  Email 2 Recipients
-  Email Resume(s) to Supervisor
-  Status Update
-  Email Job Receipt to Candidates

4. A new window will open titled "Create Resume". Within this window, you will have the option to either create new resumes for all selected candidates, or use the resume on file (if applicable) and then create resumes for candidates who do not have one:

Create Resume

1 Resume Generation
2 Resume Details

Generate Resumes for

All 3 employees
 Use existing resume-on-file or generate if none on file

SAVE AS DRAFT
CANCEL [NEXT >](#)

5. Once your preferred option is selected, select "Next" to continue within the resume generating process.
6. Within the next window, along with the standard options to resume generation, you will also have the ability to do the following:
 - Preview the resume before creation.
 - Download the resume(s). Note that when downloading the resumes, Beyond has a download limit of 25 at a time.
 - Delete the resume before creation.

 Pam Halpert			
 Harper Backstrom			
 Aaron Babcock			

7. Once you have selected the appropriate options, select "Save" and the resumes will be created for the selected candidates.

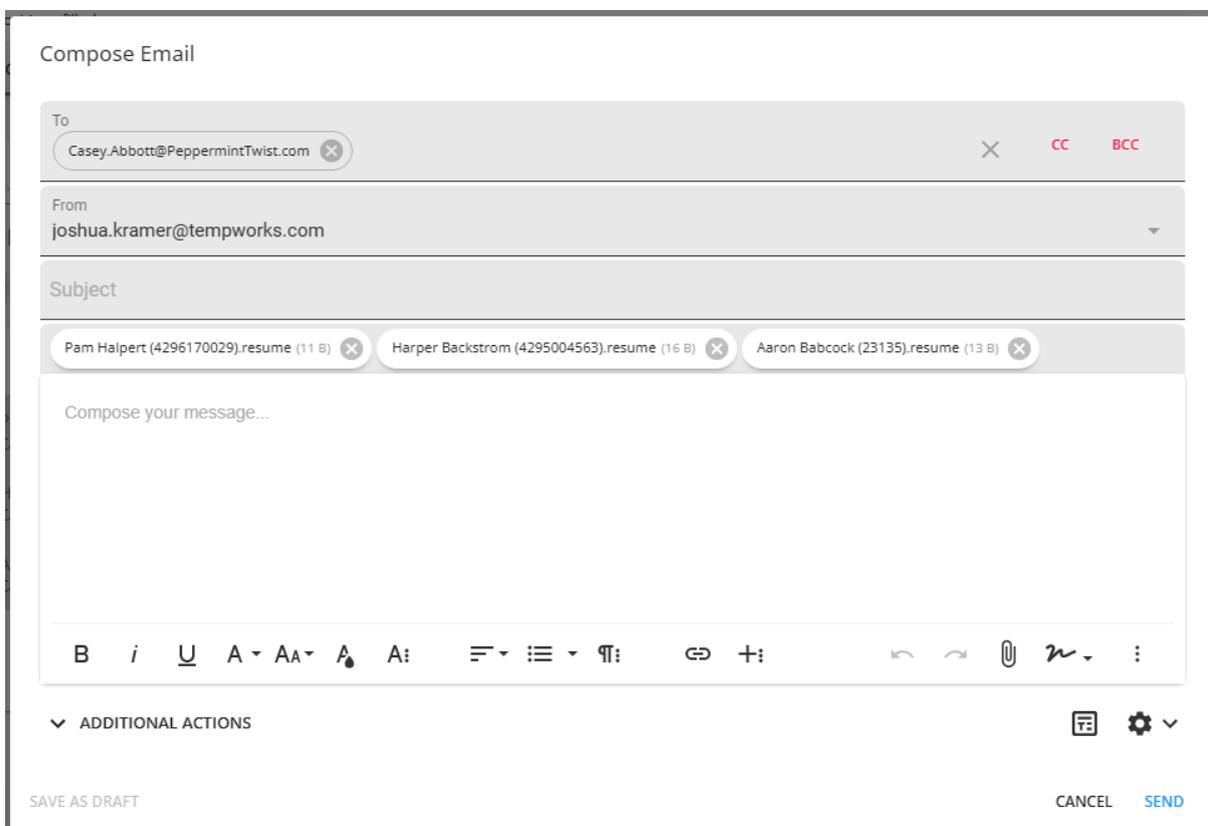
Note For more information on creating resumes for employees within Beyond, please see the article titled [Beyond - Creating an Employee Resume](#).

Emailing Candidate Resumes to Supervisor

Once resumes have been created for the candidates on the job order, those resumes can be emailed directly to the supervisor on the job order.

1. Navigate to the Candidates section of the job order
2. Select the checkbox to the left of the candidate and/or select multiple candidates via the same checkboxes, select the dropdown that states "# selected items" and finally select "Email Resume(s) to Supervisor".
 - If resumes have yet to be generated for the candidate(s), you will first be prompted to go through the resume creation process outlined within the previous section of this article.
 - If resumes have already been generated for the candidate(s), you will have the option to utilize your preferred email application, or you can compose the emails directly from within Beyond.

3. Once your preferred option has been selected, the "Compose Email" window will appear (in this example, within Beyond) and the "To" field will be filled with the supervisor that is listed on the job order as long as that supervisor has an email address listed as a contact method. Additionally, you will see the candidate(s) resume(s) listed as attachments on the email being composed:



4. Once the email has been composed, select "Send".

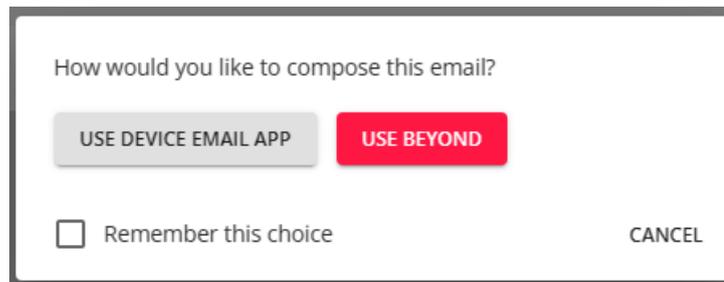
Emailing Candidates

Once candidates have been added to the job order record, you have the ability to compose and send emails to those that have email addresses listed as a contact method.

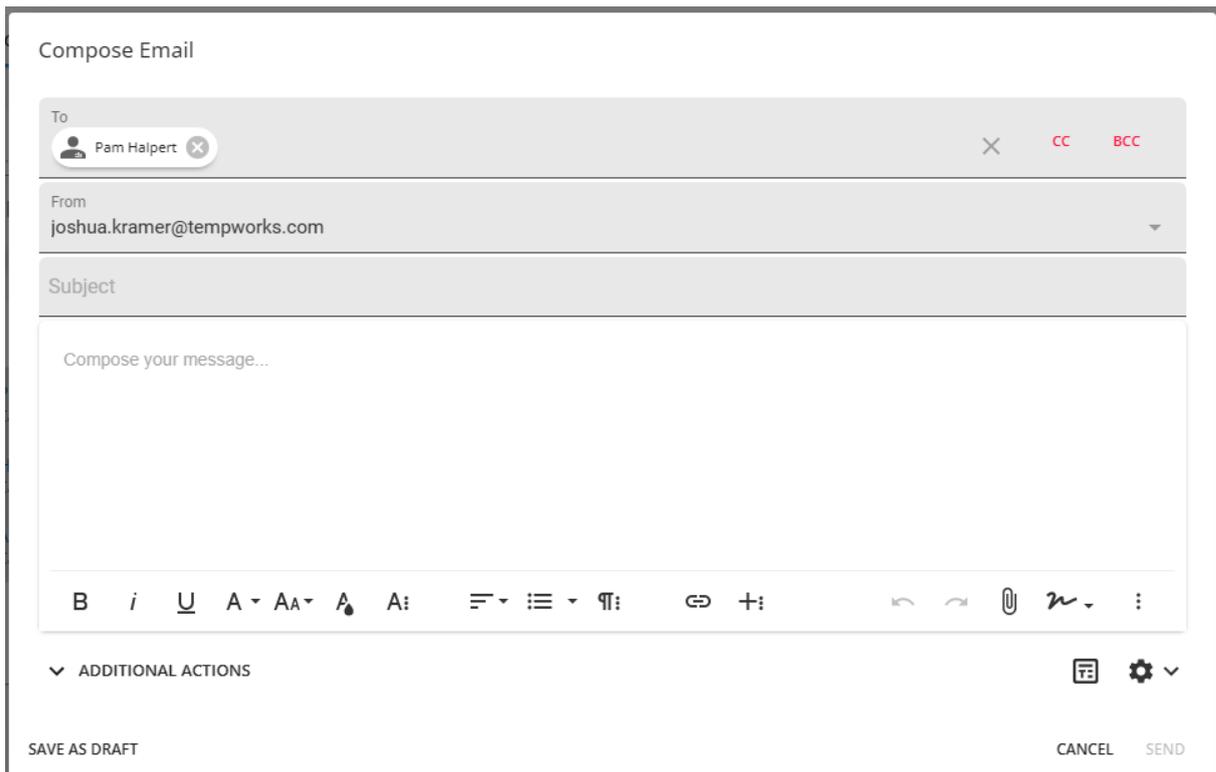
1. Navigate to the Candidates section of the job order
2. Select the checkbox to the left of the candidate and/or select multiple candidates via the same checkboxes, select the "Actions" dropdown, and finally select "Email Recipients":



3. Upon selecting "Email", you will have the option to utilize your preferred email application, or you can compose the emails directly from within Beyond:



4. Once your preferred option has been selected, the "Compose Email" window will appear (in this example, within Beyond) and the "To" field will be filled with the candidate(s) that have an email address listed as a contact method:



5. Once the email has been composed, select "Send".

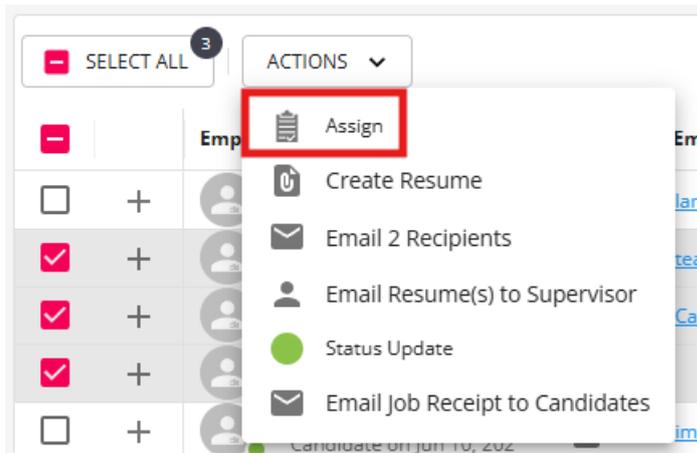
Assigning a Candidate from the Candidates Section

Once a candidate has been placed on the job, you will need to assign them to the order. You can do this directly from the candidates section or utilize the quick add button to create an assignment.

1. Navigate to the Candidates section of the job order
2. Select the  icon to the right of candidate you wish to update & select the "Assign" option:

SELECT ALL		ACTIONS		13 results						
	Employee	Resume	Email Address	Primary Phone	Status	Interest Code M...	Submitted By	Date Job Receipt Email Queued	Job Receipt Email Queu	
<input type="checkbox"/>	Lando Norris Refused on Jun 10, 2025		lando@fi.com	(612) 838-2929	Refused	50%	Matt Schwalbach			
<input checked="" type="checkbox"/>	Teah Barber Placed on Jun 10, 2025		teah_barber@zjic.com		Placed	50%	Matt Schwalbach			
<input type="checkbox"/>	Stania Delgado Candidate on Jun 10, 202		Carmel@aol.com		Candidate	50%	Matt Schwalbach			
<input type="checkbox"/>	Greg Garret Candidate on Jun 10, 202				Candidate	50%	Matt Schwalbach			
<input type="checkbox"/>	Terrence White Candidate on Jun 10, 202		imgadummyaccount--		Candidate	50%	Matt Schwalbach			
<input type="checkbox"/>	Nick Jackson Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach			
<input type="checkbox"/>	Jared Lusk Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach			
<input type="checkbox"/>	Kenny Omesa Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach			
<input type="checkbox"/>	Mally Bignardi Candidate on Jun 10, 202				Candidate	25%	Matt Schwalbach			

3. Alternatively, you can select multiple candidates to be assigned at the same time by selecting the checkbox to the left of the candidate(s) within the list, selecting the "Actions" dropdown, and finally selecting "Assign":



4. A new window will open, review the information and double check the employee start date before clicking next

Add New Assignment - Enter Assignment Information

1 Enter Assignment Information

2 Assignment Restrictions

3 Results

Assigning To Job Order:



Peppermint Twisty - Primary
Unknown: 0 of 1 positions filled

Employee:



Pam Halpert (4296170029)



Peppermint Twisty - Primary
Unknown: 0 of 1 positions filled

Start Date

10/28/2022



Employee:



Harper Backstrom (4295004563)



Peppermint Twisty - Primary
Unknown: 0 of 1 positions filled

Start Date

10/28/2022



Employee:



Aaron Babcock (23135)



Peppermint Twisty - Primary
Unknown: 0 of 1 positions filled

Start Date

10/28/2022



CANCEL [NEXT >](#)

- Any applicable assignment restrictions will appear next for you to review (see [Beyond - Assignment Restrictions](#) for more information)
- Once you have either updated the employee record or approved the assignment restrictions, the employee(s) will be assigned, and you will be redirected to the assignment record.

The Quick View Bar

A useful tool when working with candidates is the 'quick view' bar. It can be utilized by right clicking on any of your candidates:

The screenshot displays a software interface for managing job orders. The main window shows a 'Snapshot' for a job order with the following details:

Customer	Old Ed's Soda Shop - Primary	Job Title	Office Manager
Job Order Id	4295036752	Branch	High Tech NE
Pay Rate	22.00	Bill Rate	33.00
Status	Unfilled >	Date Opened	1/11/2021
Job Order Duration	Indef	Supervisor	--
Supervisor Office Phone	--		Gross Profit Calculator >

On the right side, there is a 'Customer' quick view bar for 'Old Ed's Soda Shop - Primary' (ID: 4295000617) located in Minneapolis, MN 55121. It includes navigation icons for ACTIVE, ONBOARDING, REPORTS, TASKS, and DNA STATUS. Below this, there is a 'View as' dropdown set to 'Account View' and a 'MESSAGES' section for 'AUGUST 2023' showing a 'WCandidate' message from 'Aug 16th, 7:55 AM'.

Use the 'quick bar' to log messages, view their resume, check out their story, and more.

Note For more information about the quick view bar, please see the article titled [Beyond - Quick View](#).

Related Articles