

WebCenter Admin - Configuring Order Candidate Review for Customer Contacts

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Configuring Order Candidate Review for Customer Contacts

As an Administrator of WebCenter, you can allow access for your customer contacts to review potential job order candidates on their job orders. Once they are set up to access the [Orders section of WebCenter](#), they'll see the blue Candidates link on orders that have Candidates for review.



Candidate Review access can be set up to allow the following examples:

1. [Allow Resume and Skills Viewing](#)
2. [Enable Statuses and Comments to be Edited](#)
3. [Add Custom Text to Candidate Forms](#)
4. [Provide Access to Candidate Approval and Rejection](#)

Note You must be set up as a [WebCenter Admin](#) in order to configure the order requests functionality.

Allow Candidate Resume and Skills Viewing

This configuration, located in the Customer Candidate category, lists these options to allow your customers to view the candidates' Resumes and Skills, if on the Employee's record. You can create rules to select specific customers, contacts, etc... to allow this access. Apply rules if the Default is not set to: true.

Customer Candidate	Customer Candidate Resumes Allows a customer to view candidate resumes	Default: true	Show Rules (0) ▶
Document Types			
Employee	Customer Candidate Skills Allows a customer to view candidate skills	Default: true	Show Rules (0) ▶
Miscellaneous			

Creating a Rule:

Customer Candidate	Customer Candidate Resumes Allows a customer to view candidate resumes	Default: true	Show Rules (2) ▶
Document Types			
Employee	Customer Candidate Skills Allows a customer to view candidate skills	Default: true	Show Rules (2) ▶
Miscellaneous			
Notifications			
Order	Customer Candidate Status Allows a customer to view the candidates status	Default: false	Show Rules (2) ▶
Pay Codes			
Required Documents	Customer Candidate Reviews Enabled Enables candidate reviews for a customer	Default: true	Show Rules (0) ▶
Timecard			
TimeClock			
TimeClock Rules			
Users			
Vendor			

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Once this is set up, your designated customers will be able to review available resume files and skills (interest codes) applied to the employee records, as seen below:

Review Candidates - Order 4295112776

Stock Picker/packer

Job Description: Works in warehouse Stocks shelves Misc tasks

Jamison, Jake
Minneapolis, MN
Candidate Status: Candidate

[Full Resume](#)

Select...

Additional comments (optional)

Johnson, Betsy

Rejected

No experience

Jake Jamison

Assignments Completed 0

Skills

■ = Relevant to Order

- GL-PICK/PACK 2 years
- Forklift 0 years
- Stock Room 0 years

Enable Statuses and Comments to be Edited

For each candidate submitted on the order, you can choose which statuses your customers can view and select. They can also add comments to communicate with Staffing Specialists working on the orders. This is a great way to communicate about candidates they'd like assigned! Their comments will be saved to the order on the Candidate worksheet for your staff to review.

Step 1: Enable statuses to be viewed. This configuration is also located in the Customer Candidate category. This will allow them to see the statuses you select in Step 2.

Customer Candidate Status

Default: false

Show Rules (2) ▶

Allows a customer to view the candidates status

Step 2: In the category, Candidate Status, you can set specific statuses for viewing. Each Candidate Status Default can be set to "true", to allow viewing by all customers. Create rules, to be more selective. Customers will not see any candidates that have a status they do not have permission to see.

Show Candidates: Interested

Default: false

Hide Rules (2) ▼

Allows a customer to see candidates with a status of "Interested"

Rules

When: is Use: True False Add Rule

Edit	When Customer is Peet's Coffee & Tea (4295013488) HiTech - 2	✘
	Use True	
Edit	When Customer is Randall Foods (4295014671) HiTech - 2	✘
	Use True	

Show Candidates: Interview

Default: false

Show Rules (3) ▶

Allows a customer to see candidates with a status of "Interview"

Add Custom Text to Candidate Forms:

Perhaps you would like to add some instructional text to step your customers through the WebCenter Candidate review process. You can configure that in the Customer category and creating a rule under: Candidate Review Custom Text. This will display the text on the Candidate Review form.

Select the Filter, enter the text and Add Rule, as seen below:

Candidate Review Custom Text

Hide Rules (1) ▼

Custom text to be displayed to the customer contact on the customer candidate review page.

Rules

When: is Use: Text Add Rule

[Edit](#) When Customer is Randall Foods (4295014671) HiTech - 2 ✕

Use <p>Please use the Selection drop down to indicate a status for the candidates you are interested in interviewing. Approve any candidates, review Full resumes and add any comments to send back to us on this order. Thank you.</p>

Review Candidates - Order 4295112776

Stock Picker/packer

Job Description: Works in warehouse Stocks shelves Misc tasks

Please use the Selection drop down to indicate a status for the candidates you are interested in interviewing. Approve any candidates, review Full resumes and add any comments to send back to us on this order. Thank you.

Jamison, Jake Winona, MN Candidate Status: Candidate	Full Resume	Select...	Additional comments (optional)
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Provide Access for Candidate Approval and Rejection

Following the set up above, your customers will have the access they need to select "Approved" or "Rejected" for each candidate, make comments and Save their changes to submit their feedback on the order.

Please use the Selection drop down to indicate a status for the candidates you are interested in interviewing. Approve any candidates, review Full resumes and add any comments to send back to us on this order. Thank you.

Jamison, Jake Winona, MN Candidate Status: Candidate	Full Resume	Approved	Let's make Jake an offer, please!
Pride, Charley Tucson, AZ Candidate Status: Interview	Full Resume	Interview	I am interested in interviewing Charley. Can you please set up?
Johnson, Betsy MN Candidate Status: Rejected	No Resume	Rejected	Needs experience

The Staffing Specialists can review their feedback in Enterprise, or Beyond, and start to make assignments.

candidates							
search							
log							
documents							
integrations							
messages							
tasks							
search							
Drag a column header here to group by that column.							
First Name	Last Name	Status	Active	Status...	Job Title	Comments	Has R...
Jake	Jamison	Approved	<input checked="" type="checkbox"/>	7/10/2020	Stock Picker/...	Let's make Jake an offer, please!	<input checked="" type="checkbox"/>
Charley	Pride	Interview	<input checked="" type="checkbox"/>	7/8/2020	Stock Picker/...	I am interested in interviewing Charley. Can you please set u...	<input checked="" type="checkbox"/>
Ralph	Emerson	Placed	<input checked="" type="checkbox"/>	6/30/2020	Stock Picker/...	Spoke on the phone and Ralph is interested!	<input type="checkbox"/>
Julie	Meadows	WCandid...	<input checked="" type="checkbox"/>	6/29/2020	Stock Picker/...		<input type="checkbox"/>
Betsy	Johnson	Rejected	<input type="checkbox"/>	6/29/2020	Stock Picker/...	Needs experience	<input type="checkbox"/>

Other Considerations:

Encourage your customer contacts to turn on their notifications so they will know when they have Orders with Candidates to review.

Customer contact Notifications

Notifications

Place a check next to each notification that you would like to receive. Remove a check from each notification that you would like to be unsubscribed from. Then click "Update" to save the choices.

- AddedOrderCandidate Sent when a candidate is added to an order through Job Board, WebCenter or Enterprise
- CandidateToReview Sent when there is a candidate for a customer to review

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