

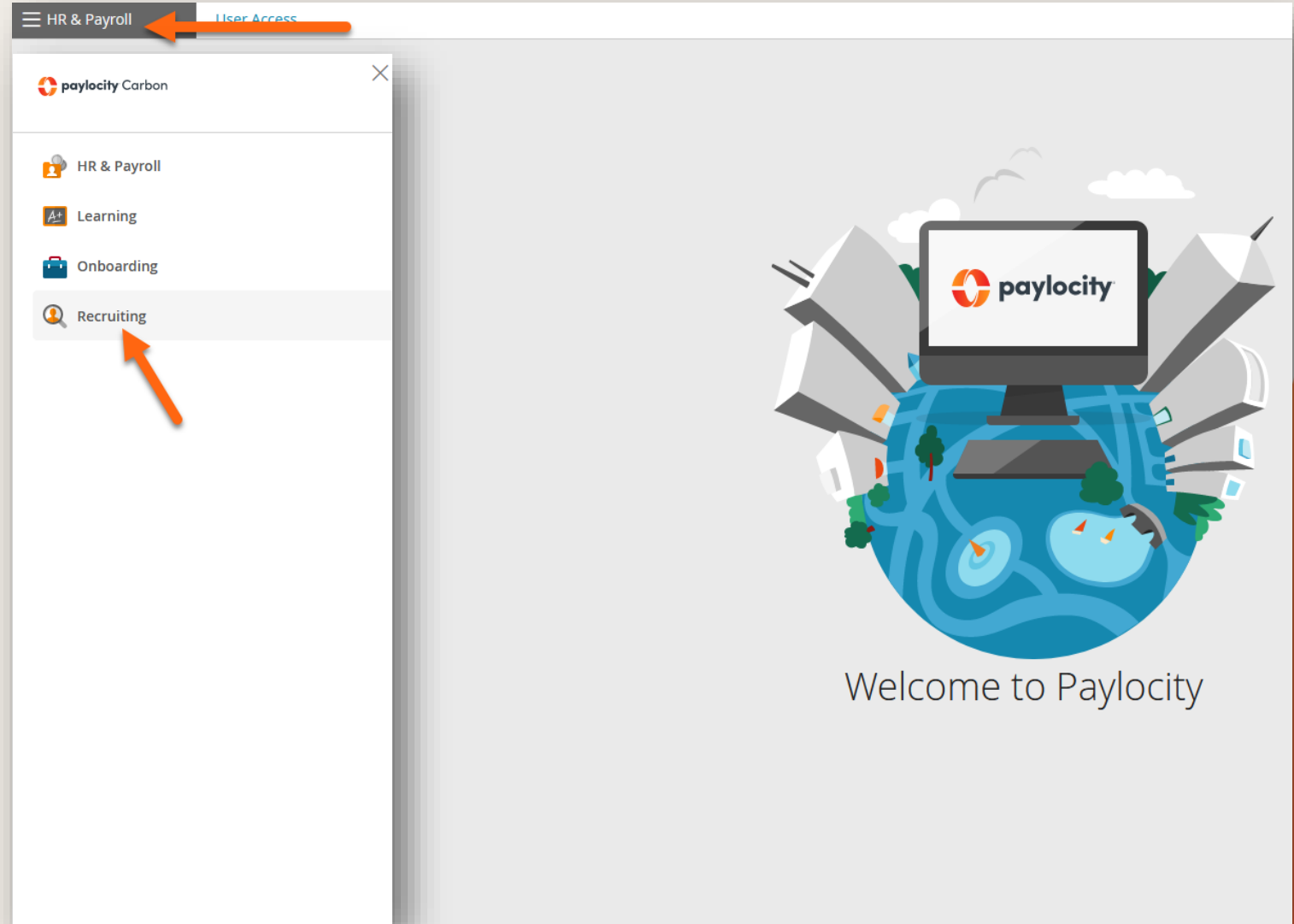


# Recruiting Module User Guide

# Navigating to Recruiting Module

## Recruiting Module

- Click on App Switcher in the top left-hand corner of your screen to open the Apps Menu
- Click On Recruiting Link
- You will automatically be redirect you to the Job Dashboard

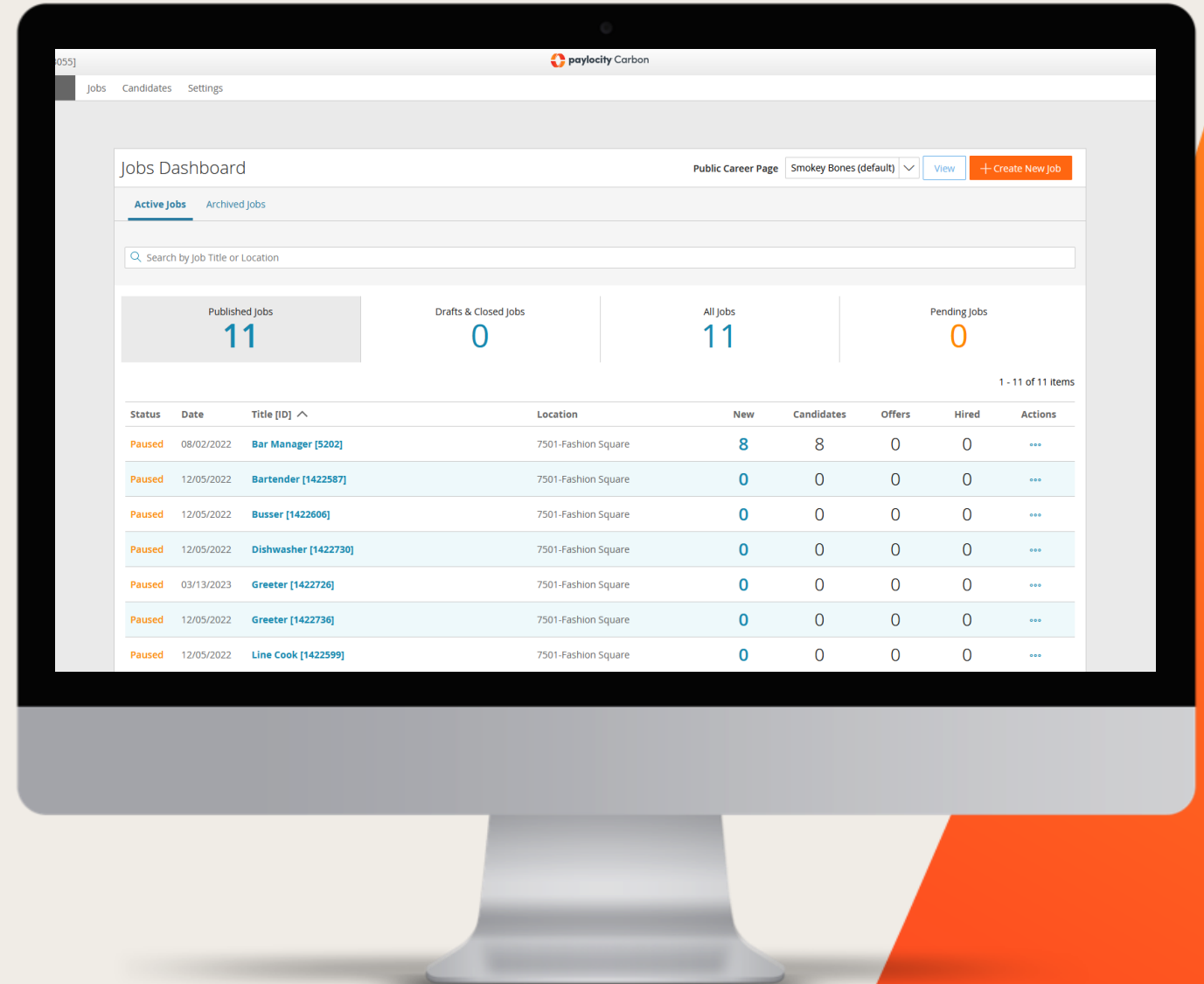


# Navigating the Recruiting Module

## Recruiting Module

### Navigating the Jobs Dashboard

- The Jobs Dashboard is your landing page as soon as you navigate into the Recruiting Module

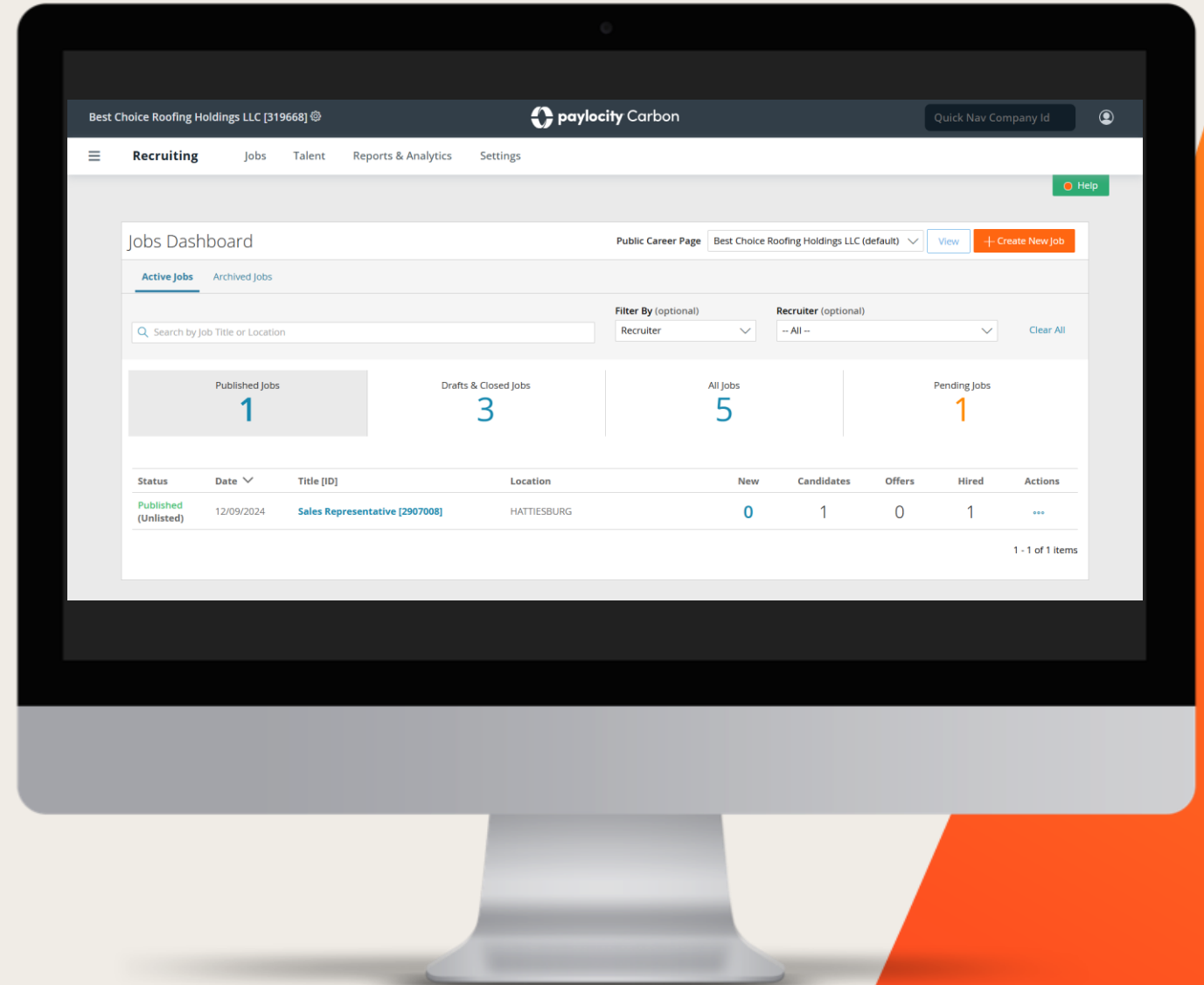


# Navigating the Recruiting Module

## Recruiting Module

### Navigating the Jobs Dashboard

- Click onto the Job Title hyperlink to drill into the details of the requisition.
- You will be able to:
  - view new and current candidate(s)
  - manage candidate(s)
  - schedule interviews with candidate(s)
  - reject candidate(s)
  - hire candidate(s)
  - send candidate(s) to Onboarding



# Navigating the Recruiting Module

## Recruiting Module

### Navigating the Jobs Dashboard

- Click on the ellipses under the far-right Action column to open the Menu.
- You will be able to Pause or Un-Pause the job, refresh the posting date, and make edits to the job.
- Any edits to a job requisition will need to be approved by Corporate HR Department before the post goes live.



# Create New Job

## Recruiting Module

- Select +Create New Job

Recruiting

JobsCandidatesLeadsReports & AnalyticsSettings

Help

Jobs Dashboard

Public Career PageTRAINIC60 (default)View+ Create New Job

Active JobsArchived Jobs

Search by Job Title

Filter By (optional)Recruiter

Recruiter (optional)-- All --

Clear All

Published Jobs5

Drafts & Closed Jobs4

All Jobs9

Pending Jobs0

Status	Date	Title [ID] ^	Location	New	Candidates	Offers	Hired	Actions
Published (Internal)	01/13/2017	Administrative Assistant	Chicago	1	1	0	0	...
Published	09/12/2021	Administrative Assistant [2325438]	Chicago	0	1	1	0	...
Published	10/06/2020	Client Trainer	Chicago	14	46	0	0	...
Published	01/13/2017	Manager	Chicago	3	4	0	0	...
Published	06/06/2017	Payroll [008]	Chicago	1	2	0	0	...

1 - 5 of 5 items

- ## Create New Job

0% Complete

  - Job Information**  
Incomplete
  - Hiring Process  
Incomplete
  - Application and Screener Questions  
Incomplete
  - Setup Approvals  
Incomplete
  - Job Preview and Status  
Incomplete
  - Advertise Job  
Incomplete

---

**Position Template**  
  
*Select a Position Template to automatically fill in details of this job posting.*

**Work Location**  
  
*Select a preset Work Location to automatically fill in this job's location*

---

▼ Internal Position Details (not displayed on job posting)

① Turn job descriptions into job templates through [Position Management](#). Edit and add new Work Locations in [Company Setup](#).

---

### Location

Select a Work Location above, or manually enter a location for your job posting.

**Is this Job Remote?**  
☒ No ☐ Yes

**Address 1**

**Location Name**

**Address 2**

**Metro City (optional - replaces city location in postings)**

**City**

**State**

**Zip**

*City & State required for posting on Google Jobs*

---

### Custom Video

Record or upload a video for your job posting. This will appear on the top of the job description page. You can add or edit the video after your job has been published.

Add Video

---

### Description and Requirements

**Job Title (required)**

# Create New Job

## Recruiting Module

### Job Information Continued

- **Job ID** is not necessary
  - *Default ID will be used if no other ID is provided*
- Enter in **Hiring Department** if you would like candidate to know
  - This is an optional field
- Add Job Type
- Add Salary – if applicable
- Add Job Slots – Number of openings
  - Add if applicable

### Job Information

Job ID (used only in recruiting)

Default ID will be used if no other ID is provided

Hiring Department (used on public jobs page)

Job Type (optional) (used on public jobs page)

-

▼

### Salary Description

Salary description is only visible to Recruiting Admins and Recruiters unless specified.

Include Salary in Public Job Posting (optional)

NoYes

Salary Description

ex: \$10 - \$20 / hour, \$50000 per year

Send Salary Details to Job Boards (optional)

NoYes

### Job Slots

Job Slot ID	Added	Delete
<div>+ Add Job Slot</div>		

Next: Hiring Process



# Create New Job

## Recruiting Module

### Hiring Process

- Select the appropriate workflow
- Hiring Team
  - Add your name into the Hiring Manager slot

<

Create New Job

20% Complete

✓

Job Information

Complete

📋

Hiring Process

Incomplete

📋

Application and Screener Questions

Incomplete

📋

Setup Approvals

Incomplete

📋

Job Preview and Status

Incomplete

Hiring Workflow

Select Workflow ?

Best Choice Roofing Hiring Process

Create From Default

Create From Scratch

Workflow Preview

New Applications 1 Step	Screening 3 Steps	Phone Interview 2 Steps	In Person Interview 2 Steps	Rejected 4 Steps	Offered 2 Steps	Hired 1 Step
----------------------------	----------------------	----------------------------	--------------------------------	---------------------	--------------------	-----------------

Hiring Team

Recruiter(s) ?

Start typing...

Hiring Manager(s) ?

ROGER RECRUITER [319668] [ROGER] X

Team Member(s) ?

Start typing...



# Create New Job

Recruiting Module

## Job Requisition Approvals

- Job Requisitions do not require approvals so click **Next: Job Preview and Status**

[<](#) Create New Job

50% Complete

✓ Job Information  
Complete

✓ Hiring Process  
Complete

✓ Application and Screener  
Questions  
Complete

📝 Setup Approvals  
Incomplete

📝 Job Preview and Status  
Incomplete

📝 Advertise Job  
Incomplete

### Job Requisition Approvals

Approvals (optional)

Disable

Enable

*Enable or disable Approvals for this job*

Previous: Application and Screener Questions

Next: Job Preview and Status



# Managing the Candidate

## Recruiting Module

### View Candidates Application, Resume, and other information

- Click onto the **Job Title** link to drill into the details of the requisition
- You will land on the **New Applications** stage
- Here you will be able to see all new applicants that have applied

Recruiting

Jobs

Talent Search

Settings

Help

< Sales Representative [5806521] Published

Action

✓ New Applications (1)

Screening (0)

Phone Interview (0)

In Person Interview (0)

Rejected (0)

Offered (0)

Hired (0)

All (1)

Search by talent profile info

Search Within

Select fields to limit s... ▾

Filter

Search

Bulk Action ▾

Column Display

<input type="checkbox"/>	Date Applied ↑	Name	Status	Current Position	Email Address	Phone Number	Tags	Last Activity	Actions
<input type="checkbox"/>	12/24/2024	Peyton Davis	New Application	VanArsdel, Ltd. Account manager	dvache@paylocity.com	(407) 572-1060		12/24/2024	...

1 - 1 of 1 items

# Managing the Candidate

## Recruiting Module

### View Candidates Application, Resume, and other information

- Click onto employee's name
- Click onto the **Application Link**
- Here you will be able to see the Candidate's **Resume**, Application (Details), and answers to the Screener Questions

The screenshot displays a candidate profile for Peyton Davis. At the top, the candidate's name is followed by pronouns (He/Him/His), location (Manhattan, NY), phone number, and email. An 'Edit Tags' button is present. To the right is an 'Actions' dropdown menu. Below this, the job title 'Sales Representative [5806521]' is shown with a location of 'Chicago' and a 'Published' status. The current status is 'New Application', with 'Reject' and 'Change Status' buttons. A tabbed interface shows 'Application' as the active tab, with other tabs for 'Activity Feed', 'Messaging', 'Interviews', 'Evaluations', and 'Offer Letter'. Within the 'Application' tab, there are buttons for 'Resume', 'Details', and 'Screener (100%)'. The main content area shows a preview of the candidate's resume, which includes contact information (123 South St. Manhattan, NY, 805.555.0123, peyton@example.com, LinkedIn Profile, www.interestingsite.com) and an 'ABOUT ME' section stating: 'I am a highly motivated and results-driven sales professional seeking a challenging opportunity to leverage my skills and experience in a dynamic sales environment.' On the right side of the profile, there is a section for '1 More Job' and 'Most Recent Notes' with an 'Add Note' button.

**Peyton Davis** (He/Him/His)  
Manhattan, NY • M:(407) 572-1060 • dvache@paylocity.com  
[Edit Tags](#) [Actions](#)

**Sales Representative [5806521]** ⓘ  
Chicago • Published  
Current Status: New Application  
[Reject](#) [Change Status](#)

[Application](#) [Activity Feed](#) [Messaging](#) [Interviews](#) [Evaluations](#) [Offer Letter](#)

[Resume](#) [Details](#) [Screener \(100%\)](#)

^ Resume

Page 1 / 1 100%

**Peyton Davis**

123 South St. Manhattan, NY  
805.555.0123  
peyton@example.com  
LinkedIn Profile  
www.interestingsite.com

**ABOUT ME**

I am a highly motivated and results-driven sales professional seeking a challenging opportunity to leverage my skills and experience in a dynamic sales environment.

1 More Job  
Most Recent Notes  
[Add Note](#)

- Peyton Davis** (He/Him/His)

Manhattan, NY • M:(407) 572-1060 • dvache@paylocity.com

Edit Tags

Actions ▾

---

Sales Representative [5806521] ⓘ

Chicago • Published

Current Status: New Application

Reject
Change Status ▾

▾ 1 More Job

---

Application
Activity Feed
Messaging
Interviews
Evaluations
Offer Letter

Most Recent Notes

Add Note

---

Resume
Details
Screener (100%)

### ^ Application Details

---

First Name: Peyton  
Last Name: Davis  
Do you give us permission to text you?: Yes  
Has Applied Before?: No  
Source: Paylocity  
Available to Start: 01/06/2025  
How did you hear about us?: Company Website  
Skills: Problem solving, Flexibility, Communication, Organization, Critical thinking, Collaboration  
Has Worked Here Before?: No  
Work Authorization: Yes

### ^ Work History

---

**Account manager**  
VanArsdel, Ltd.  
January 2019 - Present  
Currently Working Here? Yes

Managed and grew key accounts by developing strong relationships, identifying opportunities, and implementing effective sales strategies.

# Managing the Candidate

## Recruiting Module

### View Candidates Application, Resume, and other information

- Click onto employee's name
- Click onto the **Application Link**
- Here you will be able to see the Candidate's Resume, Application (Details), and answers to the **Screening Questions**

David Miller  
7890 Oak Avenue, Washington, DC, 20002  
M: (202) 555-4321 • david.miller@email.com  
[Edit Tags](#)

TEACHER [5931863] ⓘ  
Saint Holy Parish and School • Published  
Applied 02/10/2025

Current Status: New Application  
[Reject](#) [Change Status](#) ▼

Application Activity Feed Messaging Interviews Evaluations Offer Letter

[Resume](#) [Details](#) [Screening](#)

**\*\*Teacher Screening Questions**  
  
Show all Screening Options ☐  
  
Are you a fully initiated Catholic in the communion of the Catholic Church and intentionally living out the five precepts of the Church (CCC2041-2043)?  
☒ No

Actions ▼

No Additional Jobs  
[Move or Add to Job](#)

Most Recent Notes [View All](#)  
[Add Note](#)



## Managing the Candidate

## Recruiting Module

## View Candidate's Activity

- Activity Feed will display any movement, communications, notes, etc. that has occurred on this candidate's profile for you to review

Peyton Davis (He/Him/His)

Manhattan, NY • M:(407) 572-1060 • dvache@paylocity.com

Edit Tags

Actions ▾

Sales Representative [5806521] ⓘ  
Chicago • Published

Current Status: New Application  
Reject Change Status ▾

ApplicationActivity FeedMessagingInterviewsEvaluationsOffer Letter

RA Recruiting Automation  
12/24/24, 5:21 PM

📱 Sent Peyton (407-572-1060) a Text

Recruiting Automation  
Thanks for your interest in TRAINIC60 jobs. Reply STOP to unsubscribe. Msg & data rates may apply, frequency varies

Delivered a day ago (12/24/2024, 5:21:08 PM)

Open Thread

N NoReply@paylocity.com  
12/24/24, 5:21 PM

✉ Sent Peyton (dvache@paylocity.com) an Email

▾ 1 More Job

Most Recent Notes  
Add Note

## Managing the Candidate

## Recruiting Module

## Communicate with the Candidate

- Messaging will allow you to communicate with the candidate via email and text message\*
  - \*Candidate must opt into text messaging during the application process in order to text them

Peyton Davis (He/Him/His)

Manhattan, NY • M;(407) 572-1060 • dvache@paylocity.com

Actions ▾

Sales Representative [5806521] ⓘ  
Chicago • Published

Current Status: New Application

RejectChange Status ▾

ApplicationActivity FeedMessagingInterviewsEvaluationsOffer Letter

Send EmailSend Text Message

S

System  
12/24/24, 5:20 PM

✉

Sent Peyton (dvache@paylocity.com) an Email

Thank you for applying!  
Dear Peyton,

Thank you for your interest in a career at TRAINIC60. We have received your application for Sales Representative.

What happens now? We will review your application and reach out if we think it's a good match. You'll be hearing from us soon.

Sincerely,  
TRAINIC60 Human Resources

RA

Recruiting Automation  
12/24/2024, 5:20:58 PM

▾ 1 More Job

Most Recent Notes

Add Note

## Schedule Interviews

- Here in Interviews, you will be able set up interviews with candidates

Peyton Davis (He/Him/His)  
Manhattan, NY • M:(407) 572-1060 • dvache@paylocity.com  
Edit Tags

Sales Representative [5806521] ⓘ  
Chicago • Published

Current Status: New Application  
Reject Change Status ▾

ApplicationActivity FeedMessagingInterviewsEvaluationsOffer Letter

Create an interview, or let your candidate select a time slot based on your teams' availability.  
Create Interview

▾ 1 More Job

Most Recent Notes  
Add Note

# Managing the Candidates

## Recruiting Module

### Offer Letters


- Here in Offer Letter, you will be able set up and send an offer letter to a candidate. This is optional if you would like to start using this feature within Paylocity.

TEACHER [5931863] ⓘ  
Saint Holy Parish and School • Published  
Applied 02/10/2025

Current Status: New Application  
Reject Change Status ▼

ApplicationActivity FeedMessagingInterviewsEvaluationsOffer Letter

+



Managing the Candidate

Ready to hire this candidate? Generate and send an Offer Letter.

Create Offer Letter

^ No Additional Jobs  
Move or Add to Job

Most Recent NotesView All  
Add Note

**Be sure to add notes as regularly as possible to keep everyone updated on the candidate's status.**



# Managing the Candidate

## Recruiting Module

As you are reviewing candidates, you will move them through the different statuses in your workflow. Use the Change Status option to select a new status for this candidate as they progress through the stages

The screenshot displays the Paylocity Recruiting Module interface for a candidate named Peyton Davis. At the top, there is a navigation bar with a "Back to Candidate List" link, a search bar containing "Peyton Davis", and a "Help" button. Below the navigation bar, the candidate's name "Peyton Davis" is shown with a dropdown menu for "Actions". The candidate's contact information, including location (Manhattan, NY), phone number, and email, is listed. A "Sales Representative" section shows the current status as "New Application" with "Reject" and "Change Status" buttons. A large orange arrow points to the "Change Status" button. Below this, a tabbed interface shows the "Activity Feed" tab selected, displaying a message from "Recruiting Automation" dated 12/24/24. The message content is: "Thanks for your interest in TRAINIC60 jobs. Reply STOP to unsubscribe. Msg & data rates may apply, frequency varies". The "Change Status" button is highlighted with a large orange arrow.

# Managing the Candidate

## Recruiting Module

Should you come across an individual that you feel is not a good fit, please use the Reject button

The screenshot displays the Paylocity Recruiting Module interface for a candidate named Peyton Davis. The interface includes a top navigation bar with a 'Back to Candidate List' link, a search bar containing 'Peyton Davis', and a 'Help' button. Below the navigation bar, the candidate's profile is shown, including their name, pronouns (He/Him/His), location (Manhattan, NY), phone number, and email address. An 'Edit Tags' button is also present. The 'Current Status' is 'New Application'. A large orange arrow points to the 'Reject' button, which is located next to the 'Change Status' button. The 'Reject' button is highlighted with a blue border. Below the status bar, there are tabs for 'Application', 'Activity Feed', 'Messaging', 'Interviews', 'Evaluations', and 'Offer Letter'. The 'Activity Feed' tab is selected, showing a message from 'Recruiting Automation' dated 12/24/24, 5:21 PM. The message content is: 'Thanks for your interest in TRAINIC60 jobs. Reply STOP to unsubscribe. Msg & data rates may apply, frequency varies'. The message was delivered a day ago (12/24/2024, 5:21:08 PM). An 'Open Thread' button is located at the bottom of the activity feed. On the right side of the interface, there is a section for '1 More Job' and 'Most Recent Notes', with an 'Add Note' button.

< Back to Candidate List

1 of 1 Results

Peyton Davis

Help

Peyton Davis (He/Him/His)

Manhattan, NY • M:(407) 572-1060 • dvache@paylocity.com

Edit Tags

Actions

Sales Representative [5806521]

Chicago • Published

Current Status: New Application

Reject Change Status

1 More Job

Most Recent Notes

Add Note

Application Activity Feed Messaging Interviews Evaluations Offer Letter

RA Recruiting Automation

12/24/24, 5:21 PM

Sent Peyton (407-572-1060) a Text

Recruiting Automation

Thanks for your interest in TRAINIC60 jobs. Reply STOP to unsubscribe. Msg & data rates may apply, frequency varies

Delivered a day ago (12/24/2024, 5:21:08 PM)

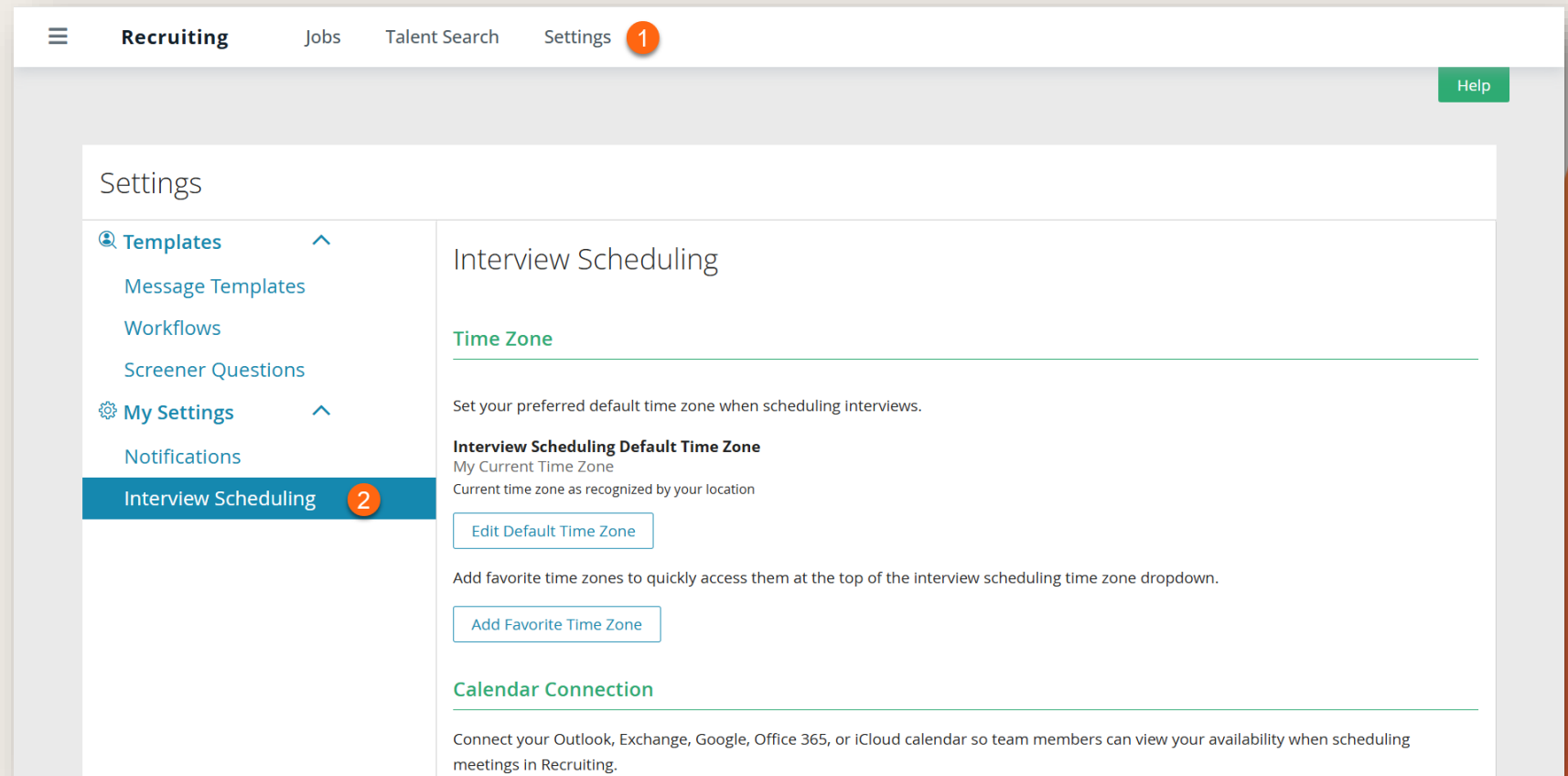
Open Thread

# Schedule Interview with Candidate

Recruiting Module

## Connect your Calendar

- Navigate to Settings
- Click Interview Scheduling





# Schedule Interview with Candidate

Recruiting

## Connect your Calendar

- Scroll down to **Calendar Connections** and open the drop down menu to select your calendar provider
- Click **Connect Calendar**
- A new tab will open in browser
- Follow guided prompts to complete the connection

Interview Scheduling

my current time zone

Current time zone as recognized by your location

Edit Default Time Zone

Add favorite time zones to quickly access them at the top of the interview scheduling time zone dropdown.

Add Favorite Time Zone

### Calendar Connection

Connect your Outlook, Exchange, Google, Office 365, or iCloud calendar so team members can view your availability when scheduling meetings in Recruiting.

Calendar Provider (optional)

Select Provider

Select Provider

Google

Office 365

Microsoft Exchange

Apple

Microsoft Outlook

Outlook / Office 365

If you are using Microsoft Outlook, you most likely will need to log into Microsoft Office 365. If you encounter an error when trying to connect, please try Office 365 and vice versa. If neither work, contact your IT admin for guidance.

### Video Conferencing Connection

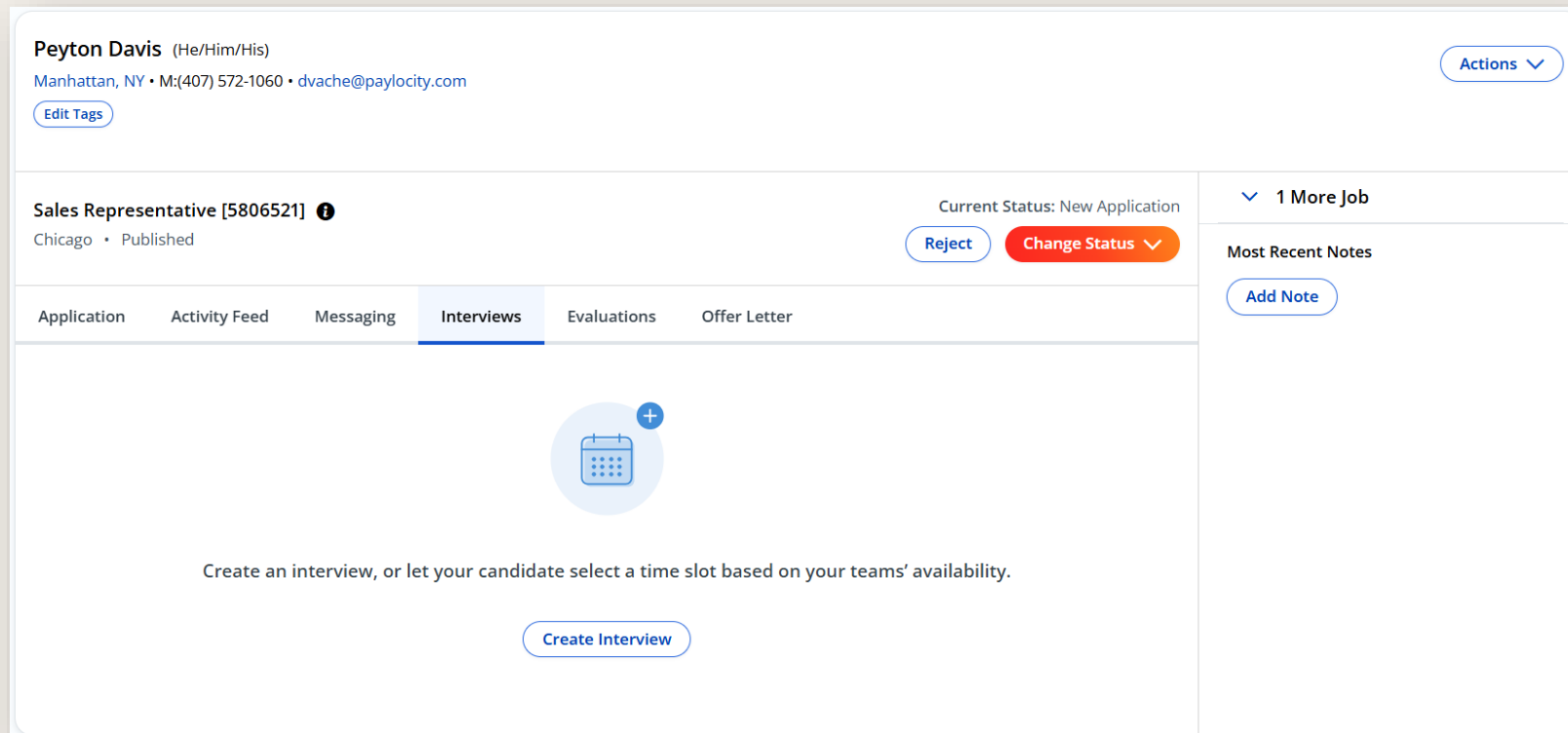
### Calendar Connection

Connect your Outlook, Exchange, Google, Office 365, or iCloud calendar so team members can view your availability when scheduling meetings in Recruiting.

Calendar Provider (optional)

Google

Connect Calendar



# Schedule Interview

Recruiting Module

## Setup Interview Round

1. Search your name and select as interviewer
2. Scroll to week that you'd like to schedule interview – calendar will populate with your busy blocks
3. Enter date, start time, and estimated duration of interview
4. Select interview type
5. Select meeting location

The screenshot displays the 'Schedule Interview' interface in the Paylocity Recruiting Module. The interface is divided into two main sections: a left sidebar for form input and a right calendar view.

**Left Sidebar (Form):**

- Interviewers:** A search bar with 'DAVID ROSE' entered and a selection button (1).
- Date:** A date picker set to '12/26/2024' (3).
- Start Time:** A time picker set to '9:30 AM' (4).
- Duration:** A dropdown menu set to '1 hr 30m' (4).
- Interview Type:** A dropdown menu set to 'In-Person' (4).
- Meeting Location:** Radio buttons for 'Video', 'Phone', and 'In Person', with 'Video' selected (5).
- Phone Number:** A text field containing '(407) 572-1060'.
- Phone number to call:** A text field.

**Right Calendar View:**

- Header:** 'Today' button, navigation arrows, date range 'Dec 23 - 27, 2024', and a 'Work Week View' dropdown (2).
- Grid:** A calendar grid showing days from Monday (23) to Friday (27). The grid is populated with 'busy' blocks for David Rose, indicating his availability. A red line highlights a conflict on Thursday (26) at 1:00 PM.

# Schedule Interview

Recruiting Moduel

## Setup Interview Round

- Click Add Meeting

Date

01/02/2025

Start Time

8:00 AM

Duration

60 min

8:00 AM - 9:00 AM EST

Interview Type

Phone

Meeting Location

VideoPhoneIn Person

Phone Number

(407) 572-1060

Phone number to call

☐ Don't set location for this meeting

Add Feedback Form

Add Meeting

Today < Dec 30, 2024 - Jan 3, 2025 > Work Week View

	30 Mon	31 Tue	1 Wed	2 Thu	3 Fri
All day	free		busy		
8am				Phone 8:00 AM	
9am	busy 9:00 AM	busy 9:30 AM		busy 9:30 AM	busy
10am	busy 10:00 AM	busy 10:00 AM		busy 10:00 AM tentati...	9:00 AM 2hr
11am	busy 11:00 AM	busy 11:00 AM			busy 11:00 AM
12pm	busy 12:00 PM	busy 12:00 PM busy 12:00 PM	busy 12:00 PM	busy 12:00 PM	busy 12:00 PM
1pm	busy 1:00 PM	busy 1:00 PM	busy 1:00 PM	busy 1:00 PM	busy 1:00 PM
2pm			busy 2:00 PM	busy	
3pm		busy 3:00 PM tentative 3:30 PM		2:00 PM 2hr busy 3:00 PM te...	

# Schedule Interview

Recruiting Module

## Setup Interview Round

- Click Continue

Thursday, January 02, 2025

Today < Dec 30, 2024 - Jan 3, 2025 > Work Week View

Phone

DR

View Info

8:00 AM - 9:00 AM (EST (-05:00) America/New\_York)

60 Minutes

(407) 572-1060

Edit Meeting

+ Add Another Meeting

	30 Mon	31 Tue	1 Wed	2 Thu	3 Fri
All day					
8am				Phone 8:00 AM	
9am					
10am					
11am					
12pm					
1pm					
2pm					
3pm					
4pm					

Continue

# Schedule Interview

Recruiting Module

## Setup Interview Round

- Click **Create Hiring Team Invitation** button

Job Details	Candidate	Recruiter(s)	Hiring Manager(s)	Team Member(s)
Sales Representative [5806521] , Chicago - IL	Peyton Davis	—	DAVID ROSE	—

### Invitation to Hiring Team

Create Hiring Team Invitation

### Invitation to Candidate

Email Notification

Create Candidate Invitation

SMS Invitation

Create SMS Invitation

Reminder emails and text messages will be sent to the candidate 24 hours before and 1 hour before the scheduled interview.  
\* Text message will only be sent if candidate opts-in when scheduling.

View Reminder

Previous: Schedule Interviews

Create Interview Round

# Schedule Interview

Recruiting Module

## Setup Interview Round

- Subject Line and Email Message pre populate for you
- Add any additional notes or reminders for yourself into message
- Click Create Invitation

Select Email Template

-None-

Email Subject

Insert placeholder

Interview with {Candidate Preferred First Name} {Candidate Last Name} for {Job Title}

Email body

B

I

U

Insert placeholder

You are scheduled to interview {Candidate Preferred First Name} {Candidate Last Name} for {Job Title} role.  
{Interview Schedule}

☐ Make Event Private

☒ Attach Candidate's Resume

Add Additional Attachments

Select File(s)

Limit of 10 files, 10MB per file and 20MB total can be attached to this email

Cancel

Create Invitation

# Schedule Interview

Recruiting Module

## Setup Interview Round

- Click Create Candidate Invitation button

### Invitation to Hiring Team

Recipients

Delete

Edit



[View Info](#)

#### Interview with Peyton Davis for Sales Representative

You are scheduled to interview Peyton Davis for Sales Representative role.

**Schedule:**

1/2/2025

8:00 AM - 9:00 AM (EST America/New\_York) with DAVID ROSE at (407) 572-1060

### Invitation to Candidate

Email Notification

[Create Candidate Invitation](#)

SMS Invitation

[Create SMS Invitation](#)

Reminder emails and text messages will be sent to the candidate 24 hours before and 1 hour before the scheduled interview.

\* Text message will only be sent if candidate opts-in when scheduling.

[View Reminder](#)



# Schedule Interview

Recruiting Module



## Setup Interview Round


- Email with Calendar Invitation (.ics) will be preselected automatically for you
- Choose whether or not candidate may reply back to your work email or just message center

Invitation to Candidate


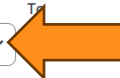
Email Notification


Candidate Invitation Options:


 **Email with Calendar Invitation (.ics)**  
Removes CC, BCC functionality and creates calendar invitation. 


 **Email with Email Only**  
Sends email to candidate.

Reply To


Work Email  

Invite Optional Interview Attendees 


Select an Employee 

☐ Send email notification to inform teammates without inviting them 

Select Email Template

-None- 

Email Subject

Insert placeholder 

You're scheduled for an interview with {Company Name}

Email Body

- Subject Line and Email Message pre populate for you
- Add any additional notes or reminders for candidate into message
- Click **Create Invitation**

Select Email Template

-None-

Email Subject

Insert placeholder

You're scheduled for an interview with {Company Name}

Email Body

B I U | ☰ ☷ | 🔗

Insert placeholder

Hi {Candidate Preferred First Name}, You're scheduled to interview with {Company Name} :  
{Interview Schedule}  
Sincerely, {User Name}

☐ Make Event Private

Add Additional Attachments

Select File(s)

Limit of 10 files, 10MB per file and 20MB total can be attached to this email

Cancel

Create Invitation

# Schedule Interview

Recruiting Module

## Setup Interview Round

- Once both invitations have been created, click **Create and Send Invitation**
- This will send a calendar reminder and invite to both you, the Hiring Manager and the Candidate

### Invitation to Candidate

#### Email Notification

Recipient  
dvache@paylocity.com

Delete

Edit

#### You're scheduled for an interview with TRAINIC60

Hi Peyton, You're scheduled to interview with TRAINIC60:

**Schedule:**

1/2/2025

8:00 AM - 9:00 AM (EST America/New\_York) with DAVID ROSE at (407) 572-1060

Sincerely, DAVID ROSE

#### SMS Invitation

Create SMS Invitation

Reminder emails and text messages will be sent to the candidate 24 hours before and 1 hour before the scheduled interview.

\* Text message will only be sent if candidate opts-in when scheduling.

[View Reminder](#)

[Previous: Schedule Interviews](#)

[Create and Send Invitations](#)

Peyton Davis (He/Him/His)

Manhattan, NY • M:(407) 572-1060 • dvache@paylocity.com

Actions ▾

Edit Tags

Sales Representative [5806521] ⓘ

Chicago • Published

Current Status: New Application

Reject

Change Status ▾

Application

Activity Feed

Messaging

Interviews

Evaluations

Offer Letter

Create Interview

Upcoming Interview Rounds

Interview Round 1

Scheduled for January 2, 2025

Sales Representative [5806521]

Phone

Thursday, January 2, 2025

8:00 AM - 9:00 AM (EST America/New\_York)

(407) 572-1060 📞

Interviewer(s)

DR

DAVID ROSE  
[4714] [TRAINIC60]

Candidate Invitation

Invitation Sent

Feedback Form

> Assign Feedback Form

▾ 1 More Job

Most Recent Notes

Add Note

# Extending an Offer

## Recruiting Module

**Peyton Davis** (He/Him/His)  
Manhattan, NY • M:(407) 572-1060 • dvache@paylocity.com  
[Edit Tags](#)

Actions ▾

**Sales Representative [5806521]** ⓘ  
Chicago • Published

Current Status: New Application

[Reject](#)

[Change Status ▾](#)

▾ 1 More Job

Most Recent Notes

[Add Note](#)

[Application](#)

[Activity Feed](#)

[Messaging](#)

[Interviews](#)

[Evaluations](#)

[Offer Letter](#)



Ready to hire this candidate? Generate  
and send an Offer Letter.

[Create Offer Letter](#)

# Extending an Offer


## Recruiting Module


- Choose the Offer Letter Template
- Please review auto-populated fields.
- Fill out required fields which may include **Start Date**, **Hiring Manager**, and **Compensation**.
- Click “Next: Compose Offer Letter”.


\*\*Please type into the data fields. These are not dropdown menus.


### < Send Offer Letter


0% Complete

 Select Offer Letter Template  
In Progress

 Compose Offer Letter  
Incomplete

 Compose Email  
Incomplete

 Setup Approvals  
Incomplete

 Preview & Send  
Incomplete

#### Select Offer Letter Template

Select Offer Letter Template to Begin (required)

Default Offer Letter Template ^

Preview Offer Letter Template

#### Custom Placeholders

Enter offer information to prepopulate the Offer Letter

<b>Company Name (required)</b>	<b>Job Title (required)</b>
<div>AoD Training</div>	<div>TEACHER</div>
<b>Candidate Full Name (required)</b>	<b>User Name (required)</b>
<div>David Miller</div>	<div>Emily Alba</div>
<b>Compensation (required)</b>	<b>Exemption Status (required)</b>
<div>Compensation</div>	<div>Exemption Status</div>
<b>Start Date (required)</b>	
<div>Start Date</div>	
<input checked="" type="checkbox"/> Sync with Onboarding	

Next: Compose Offer Letter

- Please type in Entity Address in the top right-hand box.
- Please read through the body of the Offer Letter to ensure the data points entered from the previous page populate appropriately.
- Click **“Next: Compose Email”**.

## Next: Compose Email





# Extending an Offer

## Recruiting Module

- Approvals will be disabled/not required
- Click “Next: Preview & Send”.

< Send Offer Letter

60% Complete

✓

Select Offer Letter Template  
Complete

✓

Compose Offer Letter  
Complete

✓

Compose Email  
Complete

✕

Setup Approvals  
In Progress

✕

Preview & Send  
Incomplete

Offer Letter Approvals

Approvals

Disable

Enable

Enable or disable Approvals for this offer letter

Previous: Compose Email

Next: Preview & Send

# Extending an Offer

## Recruiting Module

- Preview page will contain a preview of your email and the attached Offer Letter.
- Please review all sections for accuracy.
- “Send Offer Letter”.

< Send Offer Letter

80% Complete

✓ Select Offer Letter Template Complete

✓ Compose Offer Letter Complete

✓ Compose Email Complete

✓ Setup Approvals Complete

👁 Preview & Send In Progress

Preview Email

DAVID ROSE (Messaging Tab) to Peyton Davis (dvache@paylocity.com) December 26, 2024, 1:57 pm

TEST

Preview Offer Letter

100% Offer Template

Dear [Name],

I am pleased to inform you that you have been selected for the position of [Position] at [Company]. This is a full-time position and will be a key role in our organization. We are excited to have you join our team.

The details of your offer are as follows:

- Position: [Position]
- Department: [Department]
- Start Date: [Start Date]
- Salary: [Salary]
- Benefits: [Benefits]

Please review the attached Offer Letter for more details. If you have any questions, please contact [Contact Information].

We look forward to welcoming you to our team.

Sincerely,

[Signature]

View Offer Letter

Send Offer Letter

Previous: Setup Approvals

# Extending an Offer

## Recruiting Module

- Once Offer Letter has been sent the Candidate's Status automatically changes to **Offer Extended** and you will see a **Pending Signature** flag.

**Peyton Davis** (He/Him/His)  
Manhattan, NY • M:(407) 572-1060 • [dvache@paylocity.com](mailto:dvache@paylocity.com)  
[Edit Tags](#)

**Sales Representative [5806521]** ⓘ  
Chicago • Published

[Reject](#) [Change Status](#) ▼

Current Status: Offer Extended

▼ 1 More Job

Most Recent Notes  
[Add Note](#)

Application Activity Feed Messaging Interviews Evaluations **Offer Letter**

[Create Offer Letter](#)

**Pending Offer Letter**  
Sent December 26, 2024

[Rescind](#) [Edit and Resend](#)  
Sales Representative [5806521]

**Sent by DAVID ROSE [4714]**  
[View Offer Letter](#)  
[View Email](#)

**Expires**  
January 5, 2025

**Status**  
[Pending Signature](#)

# Edit and Resend an Offer

## Recruiting Module

- If you ever need to edit an already launched Offer Letter, click the white “Edit and Resend” button.
- You will be asked to confirm your selection.
- You will be brought back to the beginning of the Send Offer Letter process.

The screenshot displays the Paylocity Recruiting Module interface for a candidate named Peyton Davis. The candidate's profile is at the top, followed by the job title 'Sales Representative [5806521]' and its status 'Offer Extended'. A navigation bar includes tabs for 'Application', 'Activity Feed', 'Messaging', 'Interviews', 'Evaluations', and 'Offer Letter'. The 'Offer Letter' tab is active, showing a 'Create Offer Letter' button and a 'Pending Offer Letter' section. The 'Pending Offer Letter' section shows the offer was sent on December 26, 2024, by David Rose, and expires on January 5, 2025. The status is 'Pending Signature'. A red box highlights the 'Edit and Resend' button. A modal dialog titled 'Edit Offer Letter' is open, asking for confirmation to edit and resend the offer, with 'Cancel' and 'Edit and Resend' buttons at the bottom.

**Peyton Davis** (He/Him/His)  
Manhattan, NY • M:(407) 572-1060 • dvache@paylocity.com  
[Edit Tags](#)

**Sales Representative [5806521]** ⓘ  
Chicago • Published

Current Status: Offer Extended  
[Reject](#) [Change Status](#) ▼

Application Activity Feed Messaging Interviews Evaluations **Offer Letter**

[Create Offer Letter](#)

**Pending Offer Letter**  
Sent December 26, 2024

[Rescind](#) [Edit and Resend](#)

Sent by **DAVID ROSE [4714]**  
[View Offer Letter](#)  
[View Email](#)

**Expires**  
January 5, 2025

**Status**  
Pending Signature

**Edit Offer Letter** ✕

Are you sure you want to edit and resend Peyton Davis's offer letter? Sending a new offer will invalidate any previously sent offers.

[Cancel](#) [Edit and Resend](#)

# Rescind an Offer

## Recruiting Module

- If you ever need to rescind an offer letter, click the white “Rescind” button.
- You will be asked to enter in a reason.
- Click the orange “Rescind” button.

**Peyton Davis** (He/Him/His)  
Manhattan, NY • M:(407) 572-1060 • dvache@paylocity.com  
[Edit Tags](#)

**Sales Representative [5806521]** ⓘ  
Chicago • Published

Current Status: Offer Extended  
[Reject](#) [Change Status](#) ▼

Application Activity Feed Messaging Interviews Evaluations **Offer Letter**

[Create Offer Letter](#)

**Pending Offer Letter**  
Sent December 26, 2024

[Rescind](#) [Edit and Resend](#)  
Sales Representative [5806521]

Sent by **DAVID ROSE [4714]**  
[View Offer Letter](#)  
[View Email](#)

Expires Status

**Rescind Offer Letter** ✕

Are you sure you want to rescind Peyton Davis's offer letter? If circumstances change, you'll be able to create and send a new offer letter in the future.

Please enter reason for rescinding offer letter below

Rescind reason is required

[Cancel](#) [Rescind](#)

**When you are ready to hire your candidate and send their profile to the Onboarding Module, please use the status of “Hired”.**

- Click **Select Onboarding Event** if ready to launch the onboarding event now
- Click **Send to Onboarding** if you will be launching the event at a later time

## TEST

# Send to Onboarding

## Recruiting Module

### Select Onboarding Event

- For new hires, the New Hire box will be checked.
- For rehires, the Rehire box will be checked
- Click Next

The screenshot displays the Paylocity Recruiting Module interface. On the left, a candidate profile for Peyton Davis is shown, including contact information and a 'Ready to Onboard?' section. The 'Activity Feed' tab is active, showing two entries from David Rose: 'Updated Peyton's Status' and 'Sent Peyton (dvache@paylocity.com) an Email'. On the right, a modal titled 'Select Employee Type' is open, prompting the user to select an employee type for the candidate. The 'New Hire' option is selected and checked, while the 'Rehire' option is unselected. The modal also includes 'Close' and 'Next' buttons.

**Peyton Davis** (He/Him/His)  
Manhattan, NY • M:(407) 572-1060 • dvache@paylocity.com  
[Edit Tags](#)

**Ready to Onboard?**  
Select an onboarding event (also known as an onboarding packet) to launch immediately, or send Peyton Davis's information to Onboarding without selecting an event.

**Sales Representative [5806521]** ⓘ  
Chicago • Published

Application **Activity Feed** Messaging Interviews Evaluations Offer Letter

**DAVID ROSE**  
12/26/24, 2:07 PM  
→ Updated Peyton's Status  
Offer Extended → Hired

**DAVID ROSE**  
12/26/24, 1:59 PM  
✉ Sent Peyton (dvache@paylocity.com) an Email

TEST

**Select Employee Type** [Close](#) [Next](#)

Select an employee type for this candidate.

**+ New Hire** ✓  
They've never worked for the company or a new employee record needs to be created.

**Rehire**  
They've previously worked for the company.

No matching employee records found

# Send to Onboarding

Recruiting Module

## Select Onboarding Event

- Select the Onboarding Event Packet.
- Enter Employee's Expected Start Date.
- Verify the employee's information.
- Click **Launch** to send Candidates information from Recruiting to Onboarding.

< Fill in Employee Information
Close
Launch

TC
TEST CANDIDATE
Hired for Bartender - Inn of Naples, Tapestry Collection by Hilton position
Email Address  
name@fakeemail.com

The new hire will be linked to this existing employee record.  
Fill in the fields before launching an onboarding event for this new hire.

Onboarding Event ⓘ  
Choose an event

Expected start date ⓘ  
12/25/2023

Profile Information

First Name  
TEST
Preferred First Name (optional)

Last Name  
CANDIDATE
Middle Name (optional)

ⓘ At least one contact method is required: Personal Email or Mobile Phone.

Personal Email ⓘ  
name@fakeemail.com
Mobile Phone ⓘ  
(555)555-5555

Username  
test.candidate
Employee ID  
System will assign next available ID

Auto Generate Employee ID ☒

Close
Launch