



WayUp

Guide: How to Use The WayUp Candidate Tracker

Overview

The Candidate Tracker is the best way for you to manage your WayUp applicants through the recruiting process so we can track how the candidate funnel is looking.

In this guide, you'll be able to find all the relevant information for each candidate, keep your notes on the ones you find to be the best fit and move them from stage to stage.

Start by logging into wayup.com and clicking on “Candidate Tracker” in the top navigation bar. Then, go to the next slide to understand what is on your screen.



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[Applicants](#)

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[Analytics](#)

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Hey, WayUp



The Main Table

The screenshot shows the WayUp Candidate Tracker interface. At the top, there's a navigation bar with 'WayUp' logo and links for 'Post a Job', 'Applicants', 'Candidate Search', 'Listings', 'Analytics', 'Candidate Tracker', 'Messages', and 'Hey, WayUp'. Below the navigation bar, the title 'CANDIDATE TRACKER (BETA)' is displayed, followed by the subtitle 'Track your candidates through the hiring funnel.' There's a search bar with the placeholder 'Search by candidate name or email' and an 'EXPORT' button. Below the search bar are four filter dropdowns: 'Filter by role', 'Filter by listing status', 'Filter by WU Interview status', and 'Filter by disposition'. The main table has five columns: 'CANDIDATE DETAILS', 'APPLICATION DETAILS', 'WU INTERVIEW DETAILS', 'DISPOSITION', and 'ACTIONS'. The table contains six rows of candidate data.

CANDIDATE DETAILS	APPLICATION DETAILS	WU INTERVIEW DETAILS	DISPOSITION	ACTIONS
1 25db498 e75b3e5 DfK55a7-7465841@pbsonjobs.com 908566889	WayUp Beta Tester Applied on 3/15/20 at 02:28 PM Passed Digital Screen	WU Interview Scheduled 3/16/20 at 01:30 PM	Screening	Notes Message Resume
2 869b24c 2306e1 billy-testing@wayup.com 908566889	WayUp Beta Tester Applied on 3/12/20 at 03:16 PM Passed Digital Screen	WU Interview Scheduled 3/12/20 at 11:00 AM	Screening	Notes Message Resume
3 1s0f5 3763860 billy-testing@wayup.com 908566889	WayUp Beta Tester Applied on 2/26/20 at 05:02 PM Passed Digital Screen	WU Interview Canceled	Screening	Notes Message Resume
4 580cb2 9f6bd13 billy-testing@wayup.com 1125513748	WayUp Beta Tester Applied on 2/26/20 at 05:04 PM Failed Digital Screen	No Show	Rejected	Notes Message Resume
5 c19a400 62741db Cf1m0m4-c586ca7@pbsonjobs.com 918721317	Recruitment Operations Associate Applied on 2/19/20 at 10:25 AM Passed Digital Screen	WU Interview Failed	Rejected	Notes Message Resume Screen
6 7b2c48c 14d73d3 cuu0c00-149d27e@pbsonjobs.com 11232790382	Recruitment Operations Associate Applied on 2/6/20 at 12:12 PM Passed Digital Screen	WU Interview Passed 2/19/20 at 10:30 AM	Interviewing	Notes Message Resume Screen

The Main table contains 5 different columns with the following information:

1. Candidate Details
 - a. Candidate's Name
 - b. Candidate's Email
 - c. Candidate's Phone Number
2. Application Details
 - a. Position Title
 - b. Date and Time the Candidate Applied
 - c. Digital Screen Status (Passed/Failed)
3. WU Interview Details
 - a. This column includes the status and date/time of the WU Interview if your contract includes WayUp Phone Screens
4. Disposition
 - a. The Current Disposition or Stage that the Candidate is in
5. Actions
 - a. Notes: Any Notes that you've saved about a particular Candidate
 - b. Message: Send a message a candidate through WayUp's messaging platform
 - c. Resume Download
 - d. Digital Screen Answers Download

Filters and Search (1/2)

You can search and filter to find specific candidates, or candidates who fit a specific criteria. Here are different ways you can search:

SEARCH BY NAME OR EMAIL ADDRESS

A search input field with a magnifying glass icon on the left and the placeholder text "Search by candidate name or email".

Search by name or email. If you are having issues finding someone, try their nickname or just their last name, in case they have multiple ways to write their first name.

FILTER BY ROLE

A dropdown menu titled "Filter by role (1)" with an upward arrow. It contains four options: "Entry-Level Sales & Recruiting" (checked), "National Recruiter / Sales", "Sales / Recruiter", and "Summer Intern - Sales".

Use this to hone in on one or a few job listings at one time

FILTER BY LISTING STATUS

A dropdown menu with two options: "Active" (highlighted) and "Inactive".


Use this to view all applicants for your currently live or no-longer-live jobs at once

FILTER BY WAYUP INTERVIEW STATUS (Only Applicable on the Pro/Premium Plans)

- **WU Interview Failed/Passed:** Candidate had the phone screen with WayUp, and their outcome is either PASS or FAIL
- **Needs Review:** Candidate has had the phone Screen with WayUp, but their outcome hasn't been decided yet (for example, we may be waiting to hear if headcount is still open, etc)
- **WU Interview Pending:** Candidate has applied & passed the employer's Knock Out Questions but hasn't scheduled their WayUp phone screen yet
- **WU Interview Canceled by Candidate/ No Show:** Candidate canceled the interview or did not show up
- **WU Interview Scheduled:** These are the candidates who have already scheduled their interview for a date in the future
- **WU Interview Canceled:** WayUp was asked to cancel the interview (for example, if the role has been filled)
- **Failed Digital Screen:** Candidate was rejected before the phone screen due to employer's Knock Out Questions

Filters and Search (2/2)

Use this filter to find candidates based on the disposition (funnel-stage) that they are **currently** in. You can also see a number in parentheses next to each stage, representing the # of candidates that are currently in that stage.

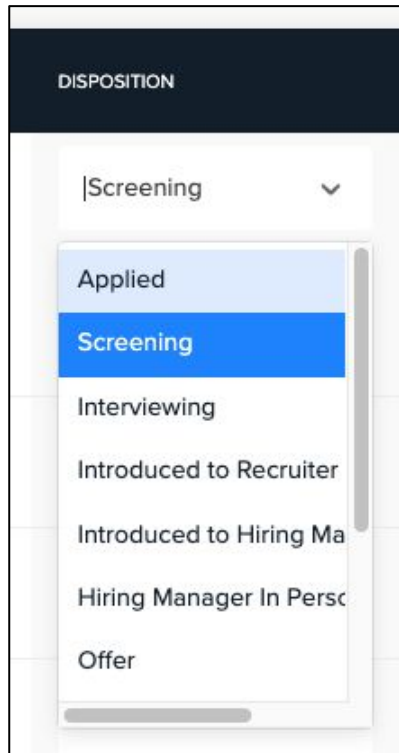
Filter by disposition (1) 

- Applied (832)
- Screening (1029)
- Interviewing (114)
 - Introduced to Recruiter (83)
 - Introduced to Hiring Manager (12)
 - Hiring Manager In Person Interview (13)
- Offer (2)
- Hired (24)
- Rejected (2738)
- Withdrawn (189)
- Holding Pattern (0)

Applied	Everyone who has applied to the position but has not yet scheduled their WayUp Phone Screen
Screening	Everyone who is in the process of scheduling their WayUp Phone Screen
Interviewing	Everyone who is in the following stages (Introduced to Recruiter/HM and HM In Person Intvw will also be counted in Interviewing)
Custom Interview Steps	In this example, there are custom interview steps "Introduced to Recruiter", "Introduced to Hiring Manager" and "HM in person interview".. Please email your CSM if you'd like to add custom interview steps for your funnel.
Offer	Everyone who currently has an offer and we are waiting to hear back from
Hired	Everyone who has received and accepted an offer
Rejected	Everyone who was ever rejected, whether by WayUp (due to KOQ or the Phone Screen) or rejected by Company. If you want only people rejected by Company, then you'd filter for people who passed the WU Phone Screen and were marked as rejected.
Withdrawn	Everyone who has withdrawn from the interviewing process. Different than rejected in the sense that the candidate is the one who decided to withdraw

How to Update the Candidate Tracker (1/2)

The main two columns in the Main Table you will use to update the tracker are **Disposition** and **Notes**.



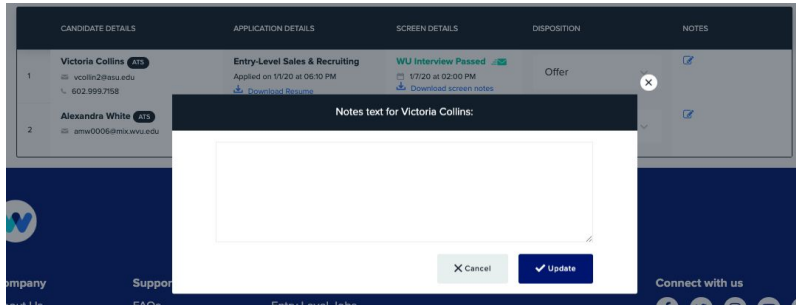
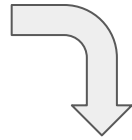
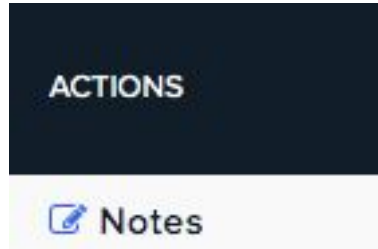
Dispositions are for you to track your candidates through all the different stages in your recruitment process. You'll notice that each candidate has a disposition and when you click the dropdown, you can move them to a different disposition in order to notify us of their status change.

Applied	You will never need to choose "Applied" or "Screening" as those two statuses are automatically selected based on where the candidate is with WayUp.
Interviewing	You will never need to select "Interviewing" as everyone that is in your recruitment process will also be considered as "Interviewing"
Custom Interview Steps	Everyone that has been in each of your custom interview steps. In the example on the left, Introduced to Recruiter/Hiring Manager and Hiring Manager In Person Interview are custom steps.
Offer	Everyone who currently has an offer who you are waiting to get a response from
Hired	Everyone who has been hired (i.e. accepted their offer)
Rejected	Everyone that you have rejected from the process.
Withdrawn	Everyone that have withdrawn from the process or have not accepted their offer
Holding Pattern	This option should only be selected if you have this feature being used for your company -- you would know if this were the case (ask your Customer Success Manager if you aren't sure).

For example, for someone who was listed as "Hiring Mgr In Person" and has had the interview but gets rejected, you (the Employer) would click the drop-down and change the selection from "Hiring Mgr In Person" to instead be "Rejected", and our system will know which stage they got rejected in.

How to Update the Candidate Tracker (2/2)

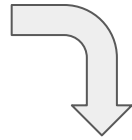
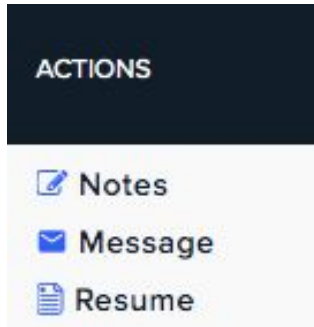
You can also input notes, such as what the date of the Hiring Manager interview is, why a candidate got rejected, or when a candidate's deadline to accept an offer is.



- Notes are written in open text.
- Write anything you want to take note of, remember for later, or communicate to the WayUp team so they can look for trends.
- Best Practice: we recommend not deleting old notes, but instead just writing the date next to your note, and then what your note is. When you want to update the note next to a candidate, just press 'enter' and write a new note below with the date that the new note is being written.

How to Message your Candidates

You can also message your candidates but only one at a time. Unfortunately, this is one limitation in which we don't have the ability to Bulk Message just yet. You can message your candidates about the next step in your process, asking them to schedule an interview or send a rejection.



- After clicking the message button you will see the thread if you've already messaged the candidate on WayUp or see a new message window to write your first message to them.
- This message will be sent to the candidates message center and their email if they've subscribed to WayUp emails.
- This message will also appear in your message center in the sent box.

How to Export Data

Right above the Main Table, you'll see an "Export" button. Click that to export whatever data is being shown in the Main Table (i.e. it will take into account any filters you have on). That way, you can play around with the data in a spreadsheet format.

