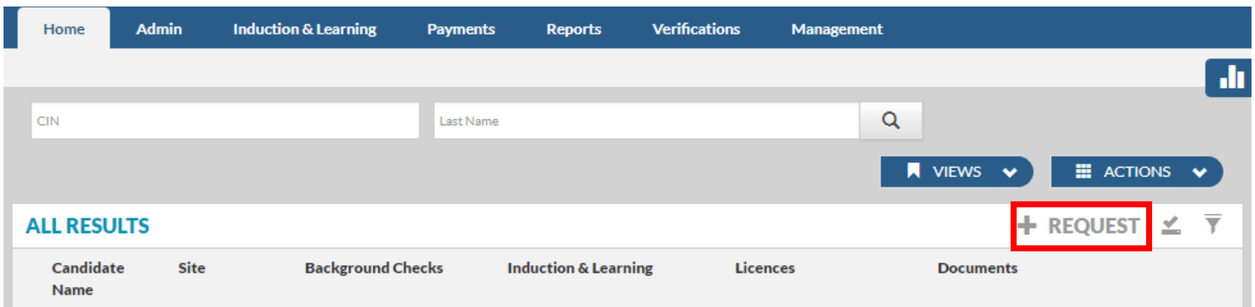
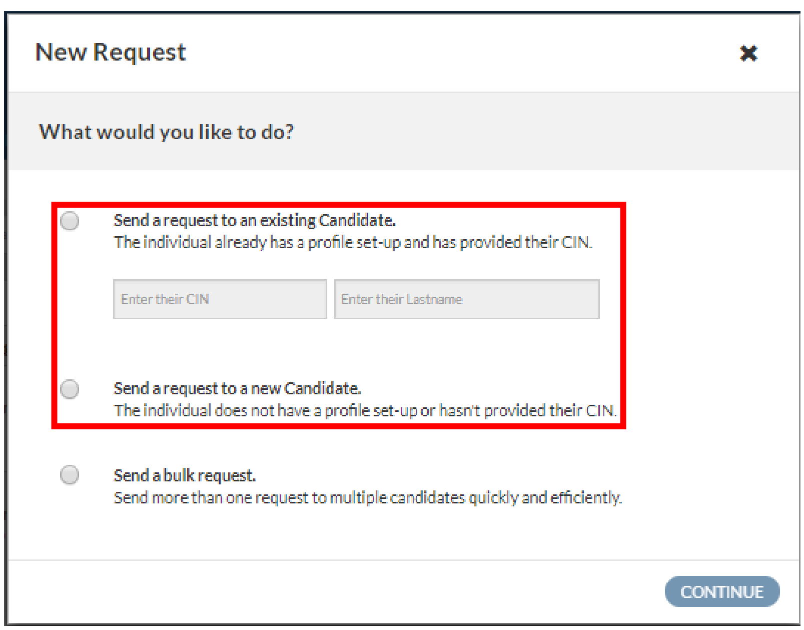
STEP-BY-STEP GUIDE TO CREATING, MANAGING, AND TRACKING REQUESTS

Sending a single request

Step 1:
On the Home page, select '+ Request'

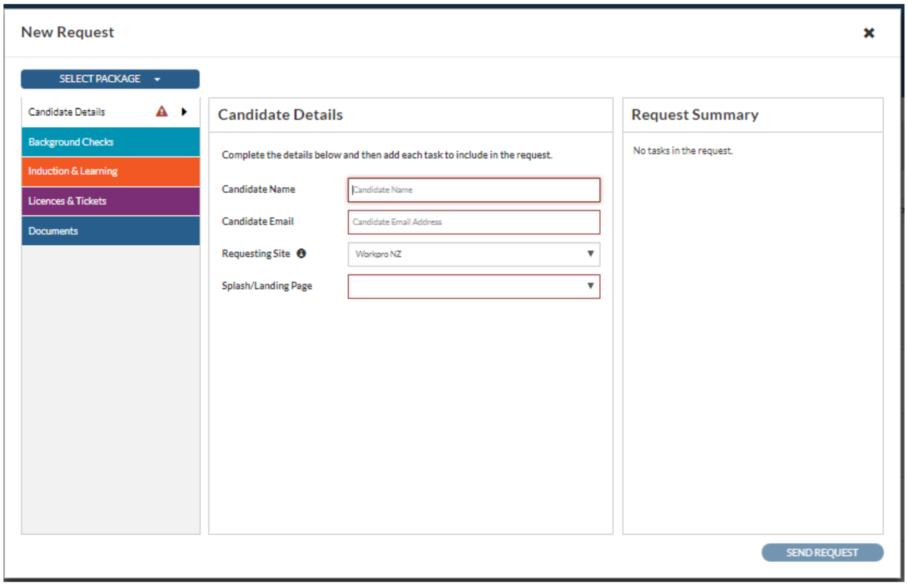


Step 2:
Choose the appropriate option – either 'Send a request to an existing Candidate' or 'Send a request to a new Candidate'.



a) Use 'Send a request to an existing Candidate' when the candidate has an account within WorkPro. To 'Send a request to an existing Candidate', you will need to enter the candidate's CIN and their Last name.

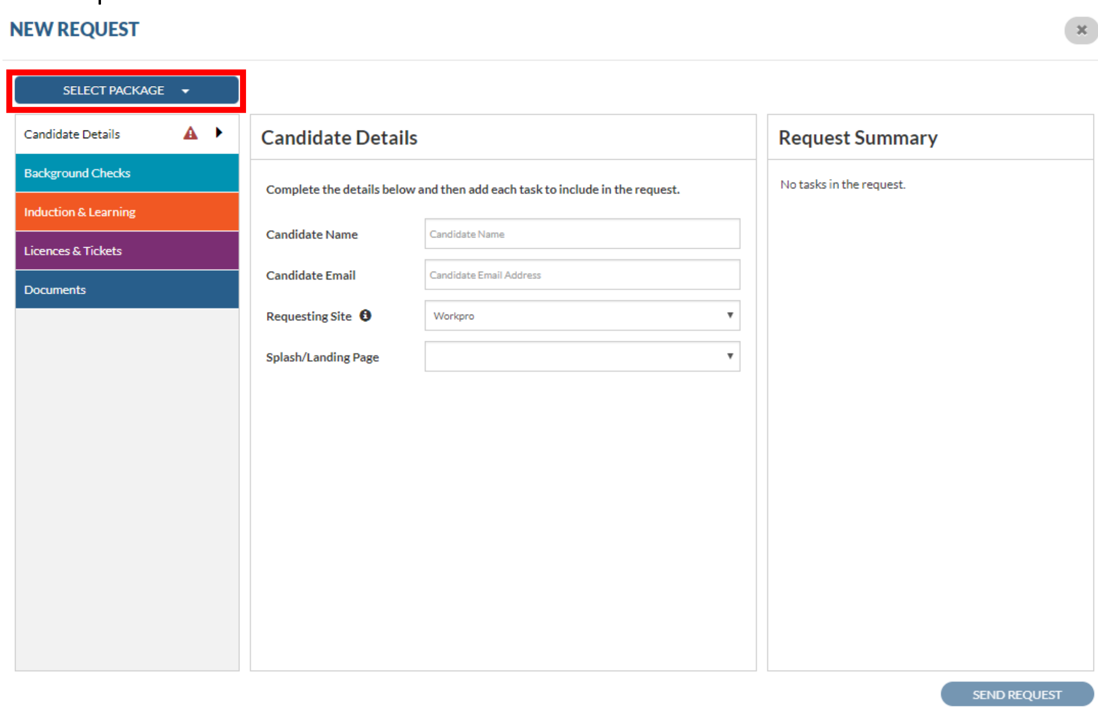
b) Select ‘Send a request to a new Candidate’ when the candidate does not yet have an account within WorkPro, then select ‘Continue’. Complete the Candidate Name and Candidate Email fields.



Step 3:

After following either of the two processes, either select a pre-defined package that you have created to be sent, or select the tasks to be completed. Any selected tasks will appear in the request summary panel.

Select ‘Send Request’.

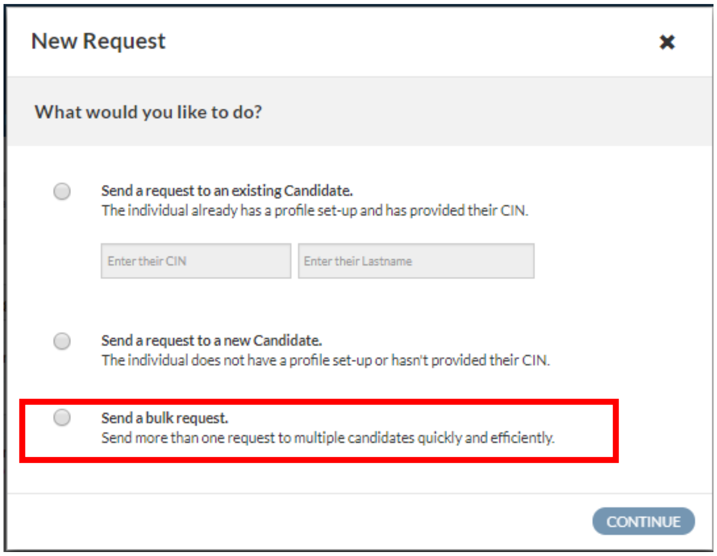


Note: Packages can be created by selecting ‘Actions’ from the Home page, then ‘Packages’ & ‘Create’.

Sending multiple/bulk Requests

Step 1:
To be able to send a bulk request, you will need to create a package. The instruction for this process is available in the User Guide 'Creating and Managing Packages'.

Once the package is defined, to send a bulk request, select '+ Request', 'Send a bulk request' and 'Continue'.



Step 2:
Choose whether to 'Use a CSV File' or to 'Enter Details Manually' and follow the instruction.

Tracking Requests

All sent requests can be tracked from the 'Actions' tab under 'Track Requests'. You have the option of re-sending the request, viewing the request or deleting the request.