

Recruitment

Human resources and payroll

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Recruitment

Plan vacancies, track applicants through interviews and make a job offer.

Intermediate · About 25 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Enterprise** plan. Contact us if you want to upgrade.

Overview

The recruitment tools let you advertise a vacancy, keep every applicant in one place, schedule interviews, record feedback and issue an offer. When someone accepts, you create their employee record from the offer.

Prerequisites

The HR Manager or HR User role, and your **Designations** and **Departments** created.

Steps

Open a vacancy

1. Search for **Job Opening** and click **Add Job Opening**.
2. Enter the **Job Title**, **Designation**, **Department** and a description of duties and requirements.
3. Set the **Status** to *Open*, and save. If your website module is enabled, the opening can be published to your careers page.

Record applicants

1. Search for **Job Applicant** and click **Add Job Applicant**.
2. Enter the name and email, choose the **Job Opening**, and attach the CV.
3. Save. Update the **Status** as the person progresses: *Open*, *Replied*, *Hold*, *Accepted* or *Rejected*.

Interview

1. Search for **Interview Round** and define your rounds, such as *Screening* and *Panel*, with the interviewers.
2. From the applicant, click **Create > Interview**, and choose the round, date and time.

3. After the interview, each interviewer opens it and records **Feedback** and a rating, then submits.

Make an offer

1. From the applicant, click **Create > Job Offer**.
2. Enter the **Designation**, offer date and terms, and submit.
3. When the candidate accepts, set the offer **Status** to *Accepted*, then click **Create > Employee** to carry the details across.

Practical example

Mwangaza Hardware opens a *Cashier* vacancy and gets 12 applicants. HR rejects those who do not meet the requirements, schedules a screening round for five, and a panel round for two. The panel's feedback favours one candidate, who receives and accepts an offer. HR creates her employee record from the offer.

Important notes

- Applicants' CVs are personal data. Limit who can see them and delete those you no longer need.
- Do not set up salary until the offer is accepted. See Salary components and structures.

Common mistakes

- Leaving old openings *Open*, so they stay on your careers page.
- Recording feedback in email instead of the interview record.

Next steps

Read Shifts and rosters.

Related documentation

- Employees
- Human resources overview
- Salary components and structures