



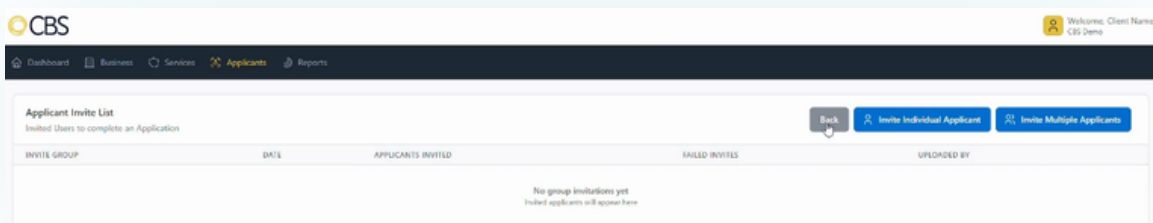
Client Guide: Inviting Applicants

Inviting Individual Applicants

Navigate to the Applicant List and select Invite Applicants. You will be presented with two options:

- Invite an Individual Applicant
- Invite Multiple Applicants

The Applicant Invite List displays information about applicants who have previously been invited through a bulk upload. This provides a record of applicants who have been invited in bulk.



To invite an individual applicant, select Invite Individual Applicant and choose the required screening package.

You will then need to enter the applicant's:

- First name
- Last name
- Email address

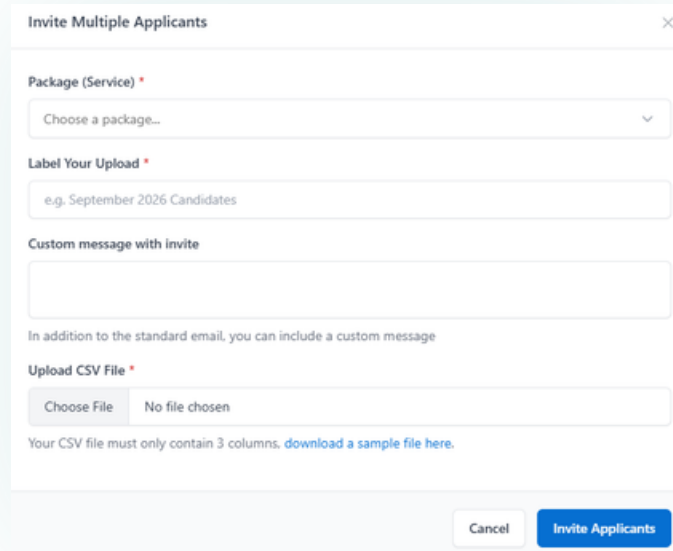
You also have the option to add a custom message to the invitation. If included, the message will appear in the email the applicant receives alongside their login details and a link to their application form.

Once the required information has been entered, you can send the invitation to the applicant.

A screenshot of the 'Invite an Individual' form. The form has a title bar with a close button. It contains several input fields: 'Package (Service)' with a dropdown menu showing 'Choose a package...'; 'Applicant First Name' and 'Applicant Last Name' as separate text boxes; 'Applicant Email' as a text box; and 'Custom message with invite' as a larger text area. Below the text area is a small note: 'In addition to the standard email, you can include a custom message'. At the bottom right of the form are two buttons: 'Cancel' and 'Invite Applicant'.

Inviting Multiple Applicants

To invite multiple applicants at the same time, select Invite Multiple Applicants.

The screenshot shows a web form titled "Invite Multiple Applicants" with a close button (X) in the top right corner. The form contains several fields: a dropdown menu for "Package (Service) *" with the placeholder text "Choose a package..."; a text input field for "Label Your Upload *" with the example text "e.g. September 2026 Candidates"; a text area for "Custom message with invite" with a note below it stating "In addition to the standard email, you can include a custom message"; and a file upload section for "Upload CSV File *" with a "Choose File" button and the text "No file chosen". Below the file upload section, there is a note: "Your CSV file must only contain 3 columns. [download a sample file here.](#)". At the bottom of the form are two buttons: "Cancel" and "Invite Applicants".

Select the screening package for the applicants. All applicants in the upload will be screened to the same level, so applicants requiring different packages must be invited separately.

You will then need to add a label to the upload. The label can be anything that helps you identify the group of applicants, such as:

- The date of the upload
- The department or team
- The type of applicants

You can also add a custom message (if required), which will be included in the invitation email sent to all applicants.

Upload a CSV file containing each applicant's first name, last name, and email address. The CSV must follow the format shown in the sample file downloadable to ensure the applications are created correctly.

Once the file has been uploaded, select Invite Applicants. The upload will then appear in the Applicant Invite List.





Head Office:

Complete Background Screening,
The Screening House,
Cwm Cynon Business Park, Mountain Ash, CF45 4ER

London Office:

5 St John's Lane, London, EC1M 4BH

T: 01443 799 900

E: info@cbscreening.co.uk

Company Registration No. 05435348 | VAT No. 860086430