

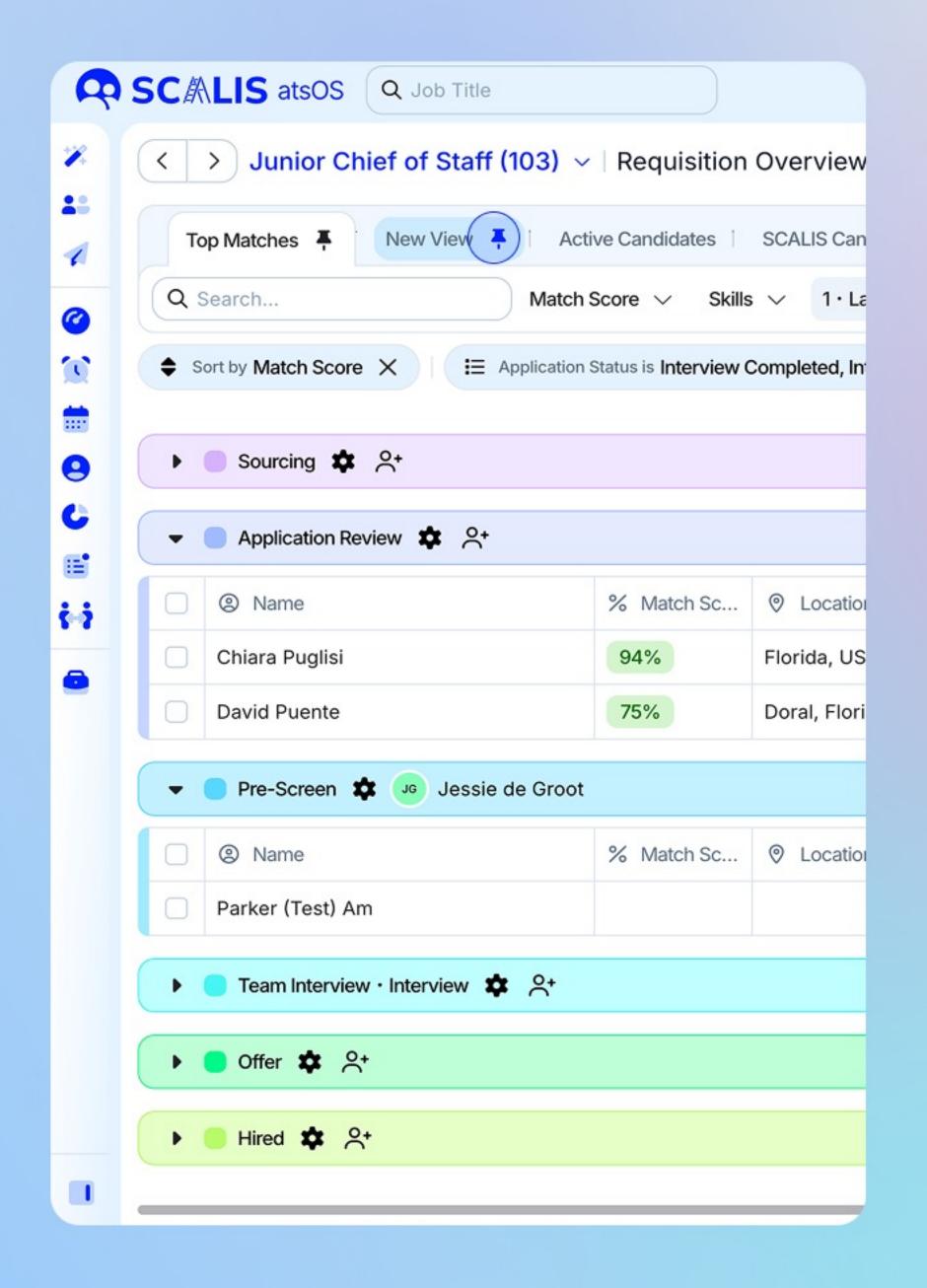
### STEP 6

# Creating Custom Views in Pipelines

Custom views in your candidate dashboard let you save filtered pipelines as tabs—making it easy to toggle between specific groups like Uploaded Candidates, Interviewing Soon, or Top Matches.

## >> What You Can Customize in a View

- Filters: Application status, source, profile type, tags, etc.
- Columns: Show or hide data like match score, last activity, recruiter, etc.
- Sorting: Sort by score, date added, name, etc.
- Pinning: Pin key views for quick access.
- Sharing: Copy a direct link to share with your team.



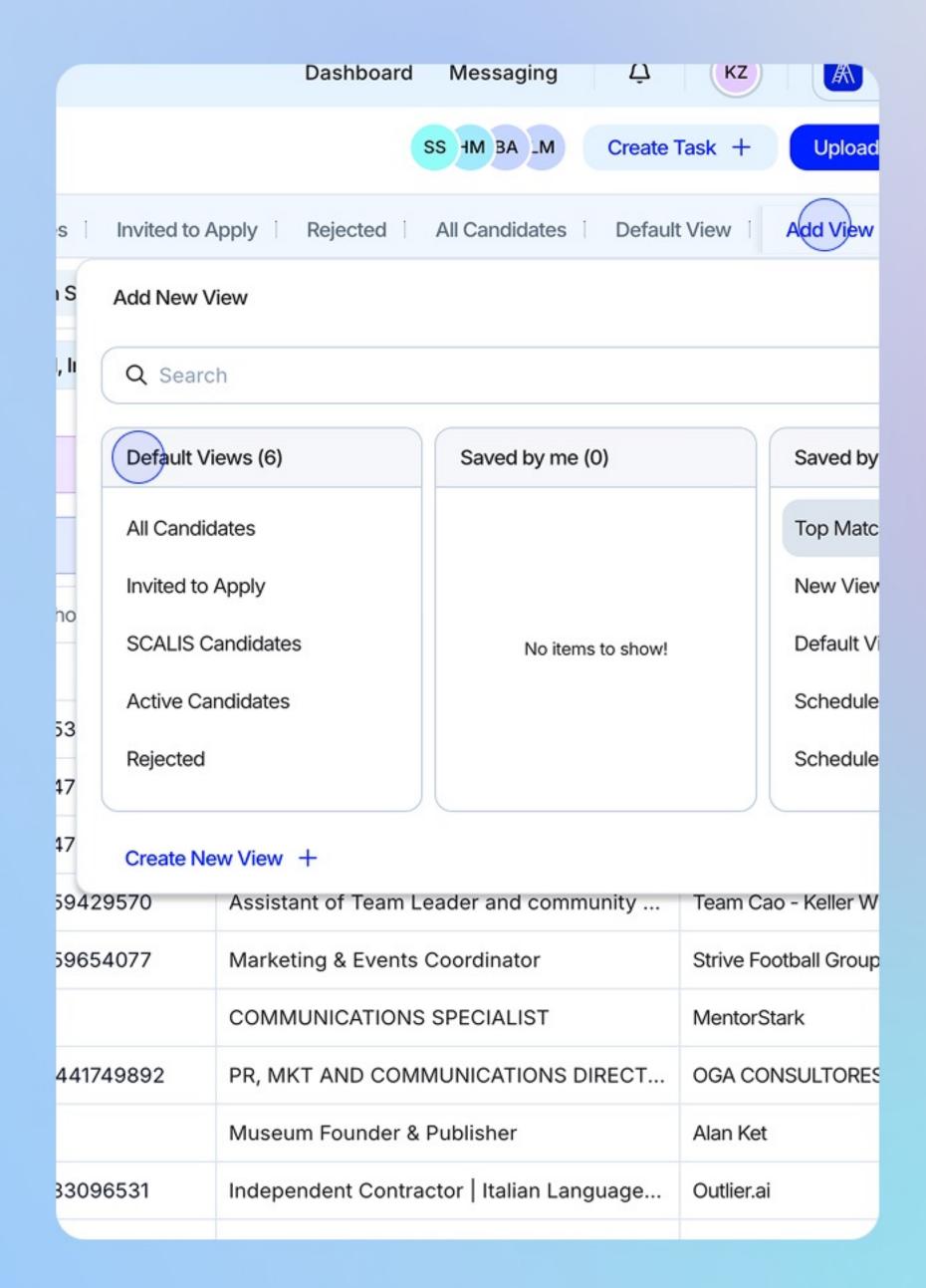
### **STEP 6.1**

# Creating Custom Views in Pipelines

# ✓ Default Views (Removable)

Your pipeline comes preloaded with a few helpful default views these are just pre-filtered tabs and can be removed or customized like any other saved view.

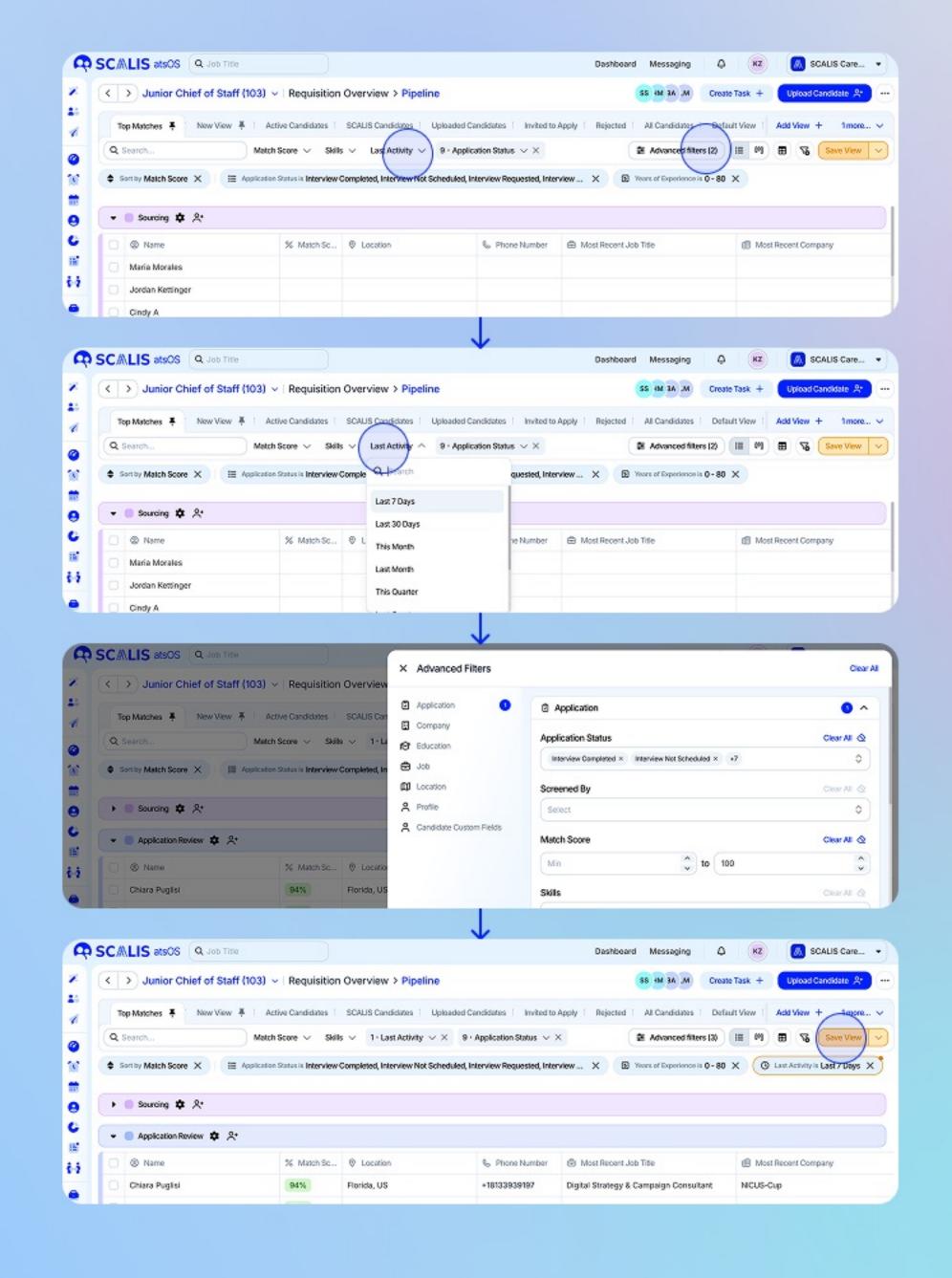
- Active Candidates: Candidates actively moving through the pipeline (not rejected).
- Uploaded Candidates: Candidates manually added or imported (not sourced or invited).
- SCALIS Candidates: Candidates that have a SCALIS profile.
- Rejected: Candidates who were disqualified or rejected.
- Invited to Apply: Candidates you proactively invited to submit an application.



### **STEP 6.2**

# **Creating Custom Views in Pipelines**

- Steps to Create a Custom View
- 1. Navigate to the Job Dashboard and select the job you're working on. You'll land on the Pipeline view.
- 2. Apply filters using the Quick Filters Bar at the top of the view or the Advanced Filters Drawer by clicking the "Advanced Filters" button.
- You can customize your columns to show or hide fields.
- 4. Once your filters and columns are set click "Save View" button, select "Save as New View" to create a brand new tab and give your view a clear, descriptive name (e.g., Active SQL Candidates).



#### **STEP 6.3**

# Creating Custom Views in Pipelines

+ Add Views from Other Jobs or Create One from Scratch

Click "Add View +" in the pipeline tab bar. You'll see a modal with three sections:

- Default Views: The five default filters for this workspace.
- Saved by Me: Any views you've saved in this or other jobs (can be reused across jobs).
- Saved by Others: Views created by teammates (if shared).

To add a view: Simply click any view from Default, Saved by Me, or Saved by Others to add it to the tab bar.

To start fresh: Click "Create New View +" at the bottom of the modal.

