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× Create Pipeline Template

Pipeline Template Name:

Department:

Sourcing

-
- Stage Visibility: Public
- Stage Type: Generic Stage

Application Review

-
- Stage Visibility: Public
- Stage Type: Generic Stage

Pre-Screen Add Stage **+**

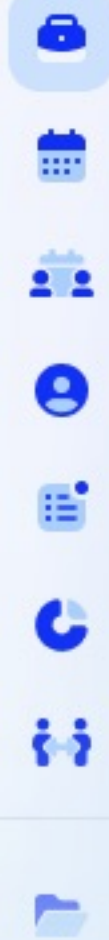
Interviews Add Stage **+**

Offer

-
- Stage Visibility: Public
- Stage Type: Generic Stage
- Add Stage **+**

Hired

Close Save



Active Candidates SCALIS Candidates Prospects Invited to Apply Rejected +								
Search by name... Match Score Stage Last Activity Date Status Skills Advanced Filters Save View								
Sourcing								
<input type="checkbox"/>	Name	Rating	Current Job Title	Current Company	Match Score	Websites	Status	Most Recent
<input type="checkbox"/>	Jacob Jones	★ ★ ★ ☆ ☆	Copywriter	B. FarisBering	49%	in globe f	Prospect 2w ago	Cosmetics
<input type="checkbox"/>	Jerome Bell	☆ ☆ ☆ ☆ ☆	UI Developer	Verify	93%	—	Invite Expired 1d ago	Wellness
<input type="checkbox"/>	Darlene Robertson	☆ ☆ ☆ ☆ ☆	UI Designer	Metaful	71%	ig f	Invited to Apply 1w ago	Logistics
<input type="checkbox"/>	Savannah Nguyen	★ ★ ★ ★ ★	Senior Software Engineer	Leannon and Sons	79%	in	Invited to Apply 1w ago	Logistics
<input type="checkbox"/>	Ralph Edwards	☆ ☆ ☆ ☆ ☆	DevOps Engineer	Advanta Inc.	69%	in globe globe	Invite Declined 5d ago	Chemicals

Welcome to SCALIS!

Getting Started with Pipeline Setup

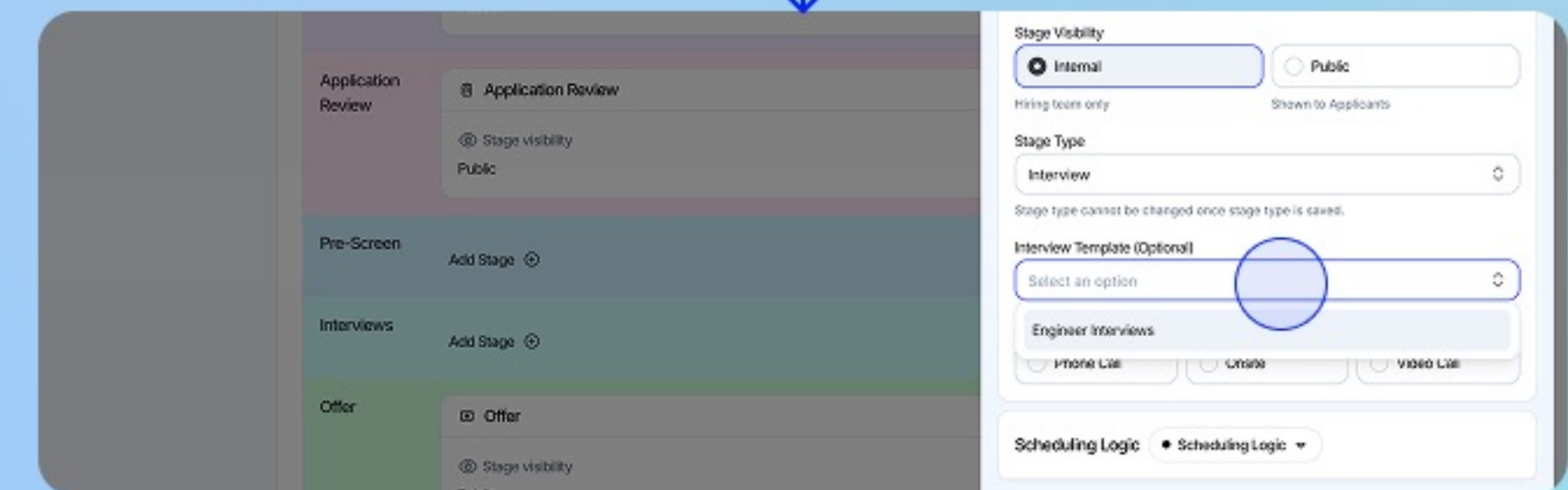
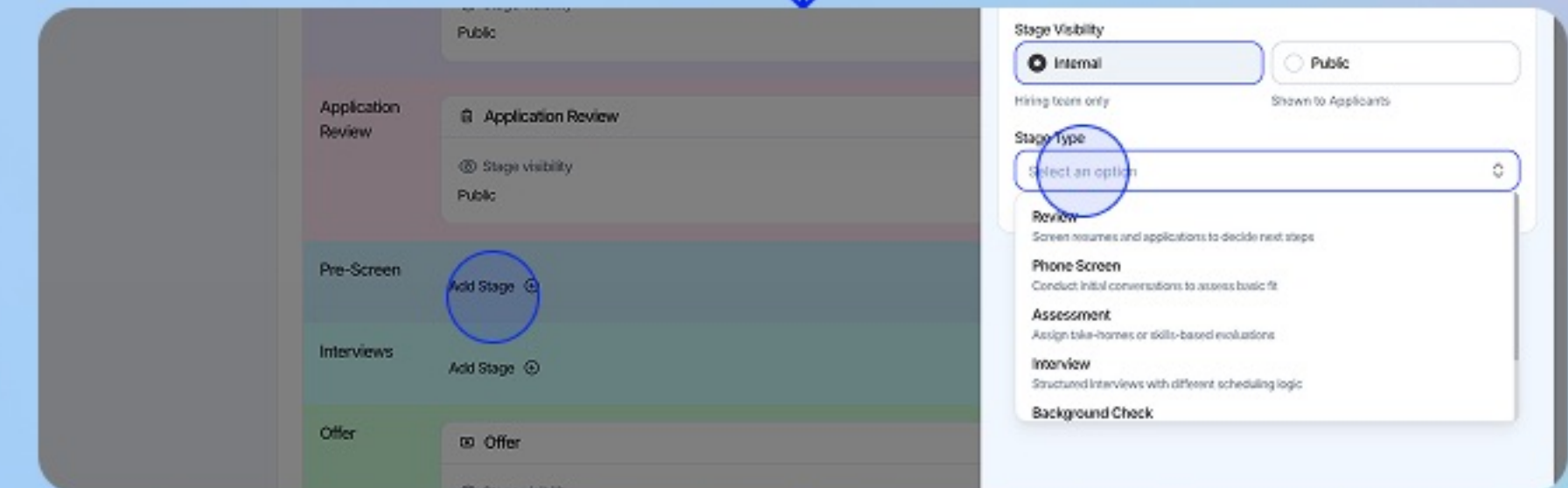
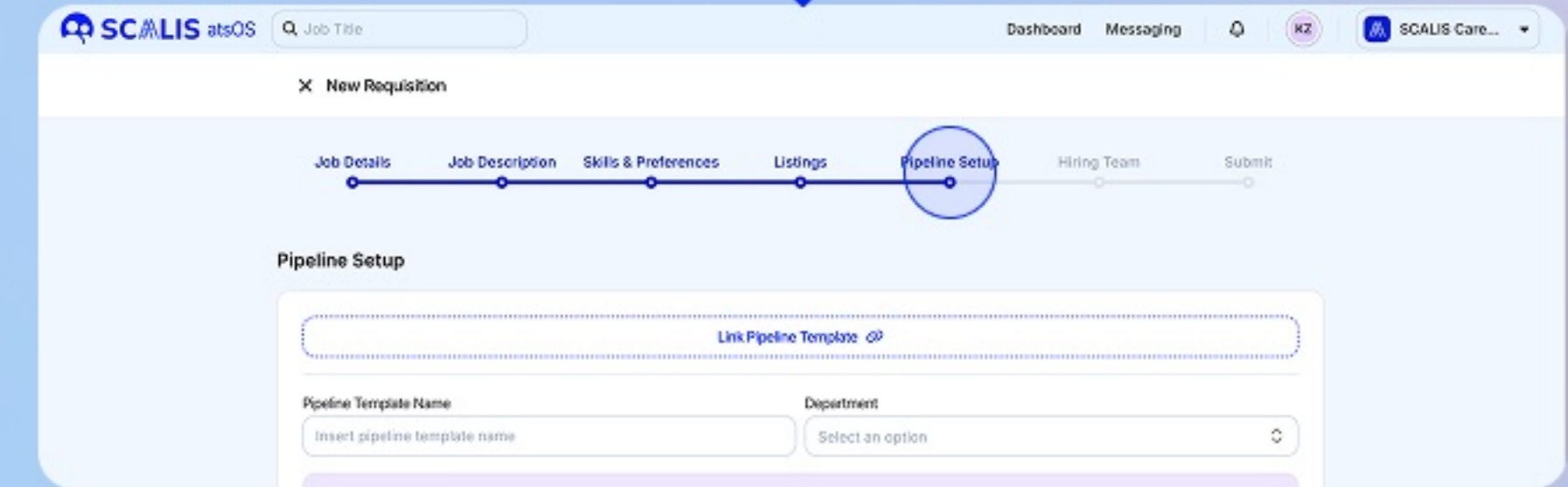
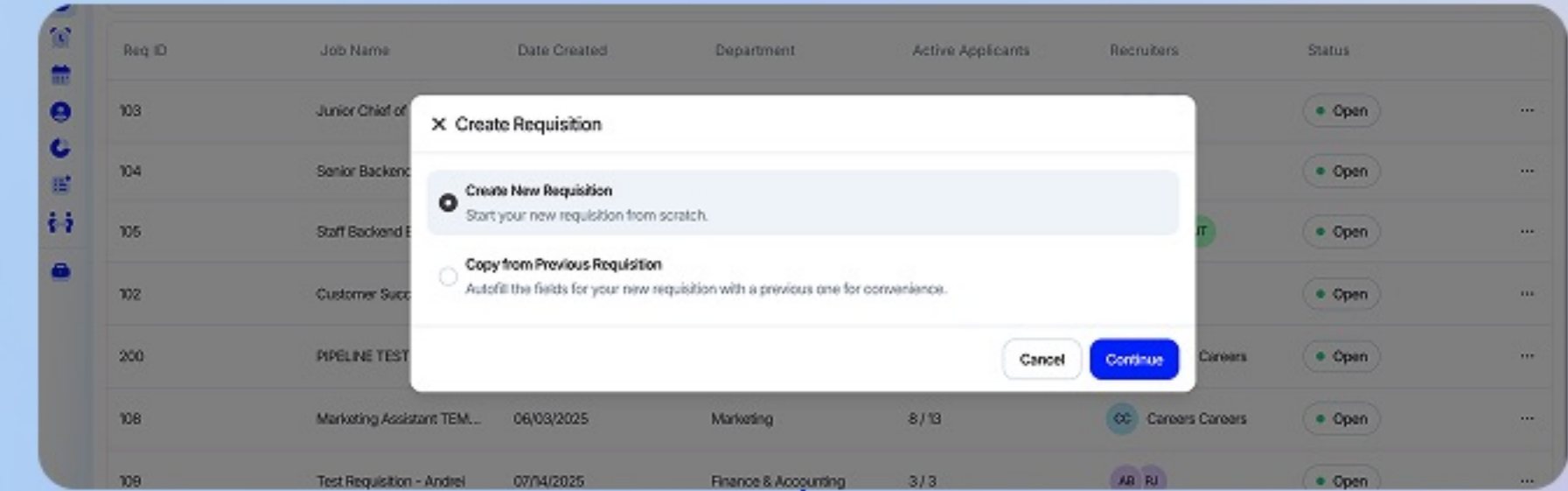
We're thrilled to have you on board! Follow this step-by-step guide to learn how to configure, organize, and update your Pipeline Setup.

STEP 1

Setting up a Pipeline

From the Pipeline Setup, you can: **Name your pipeline** for internal reference, **select a Pipeline Template**, and **customize stages** within the Pre-screen, Interview and Offer milestones.

1. Navigate to your **Job Dashboard** and Click **“Create Requisition”**.
2. Fill out the information for your new requisition and navigate to **“Pipeline Setup”**.
3. Click **“Add Stage”** and select a stage type.



STEP 1.1

Setting up a Pipeline

There are 5 different stage types: Review, Generic, Phone Screen, Interview, and Assessment.

If you need to enable Reference Check or Background Check stages, please contact our team.

Review

Internal team member responsible for reviewing this stage. Reviewers are typically assigned based on expertise or stage ownership.

Generic

Flexible stage type without predefined requirements. Can be used for any process step that doesn't fit other specific stage types.

✕ Add Stage

Stage Name

Insert stage name here

Stage Visibility

Internal

Hiring team only

Public

Shown to Applicants

Stage Type

Review

Stage type cannot be changed once stage type is saved.

Assign Reviewer

Select an option

Cancel

Add Stage



STEP 1.2

Setting up a Pipeline

Phone Screen


Initial screening stage requiring setup of format, interviewer, and logistics.


- **Interview Template:** Specifies the format of the interview, determining how the session will be conducted.
- **Interview Type:** Specifies the format of the interview, determining how the session will be conducted.
- **Scheduling Logic:** Determines the structure and flow of the interview.

✕ Add Stage


Stage Name

Stage Visibility
 Internal Public
Hiring team only Shown to Applicants

Stage Type
 
Stage type cannot be changed once stage type is saved.

Interview Template (Optional)
 

Interview Type
 Phone Call Video Call

Scheduling Logic Scheduling Logic 

STEP 1.3

Setting up a Pipeline

Assessment


Technical or take-home assignment stage for candidate's evaluation.


- **Assessment Type:** Specifies the format of the assignment. External Link directs the candidate to an external test, while Take-Home is a file uploaded for the candidate to complete.
- **Assign Reviewer:** Defines who will evaluate the assessment.
- **Expiration Date:** Defines the time limit for the candidate to complete the assessment.
- **Scorecard Template:** Determines the evaluation form used by the interviewer to assess the candidate's performance.


✕ Add Stage


Stage Name


Stage Visibility
 Internal Public
Hiring team only Shown to Applicants

Stage Type
 
Stage type cannot be changed once stage type is saved.

Assessment Type
 

Assign Reviewer
 

Expiration Date
 

Scorecard Template (Optional)
 

STEP 1.4

Setting up a Pipeline

Interview

Core interview stage requiring format, interviewer(s), and evaluation setup.

- **Interview Template:** Specifies the format of the interview, determining how the session will be conducted.
- **Interview Type:** Specifies the format of the interview, determining how the session will be conducted.
- **Scheduling Logic:** Determines the structure and flow of the interview.

✕ Add Stage

Stage Name

Stage Visibility
 Internal Public
Hiring team only Shown to Applicants

Stage Type
 Stage type cannot be changed once stage type is saved.

Interview Template (Optional)

Interview Type
 Phone Call Onsite Video Call

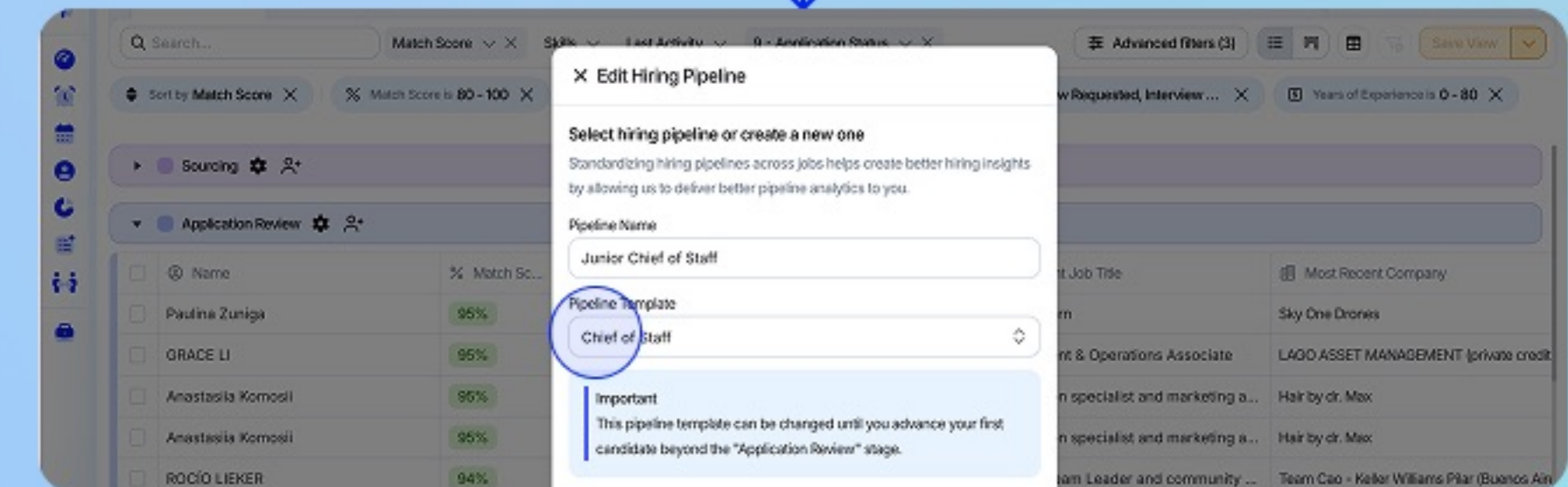
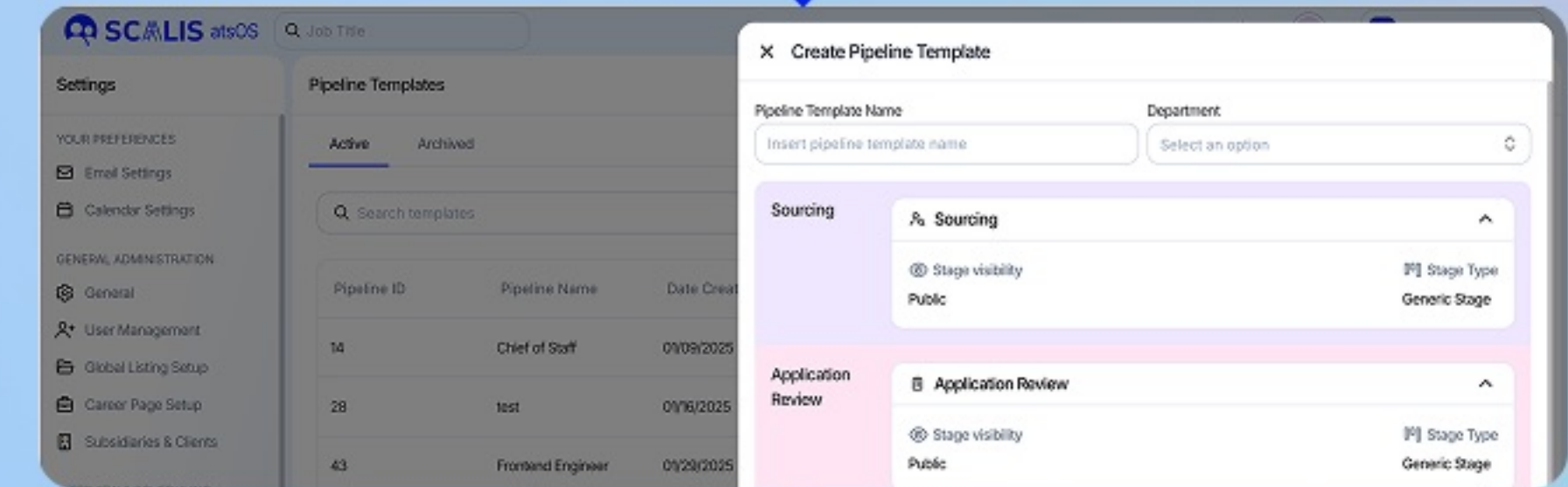
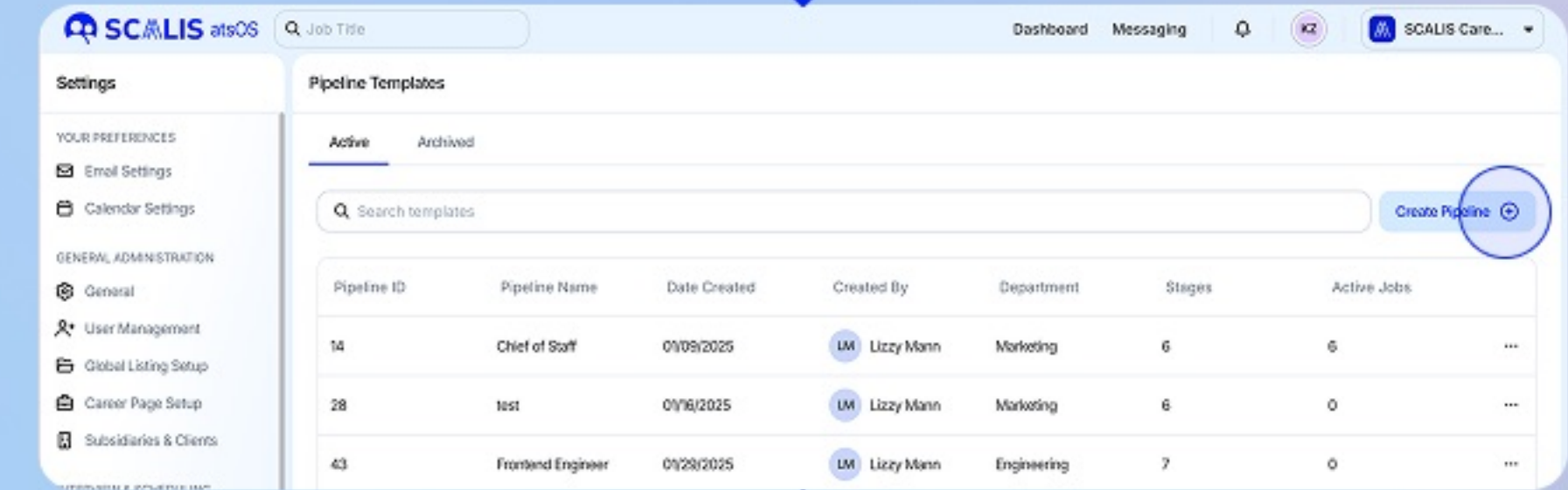
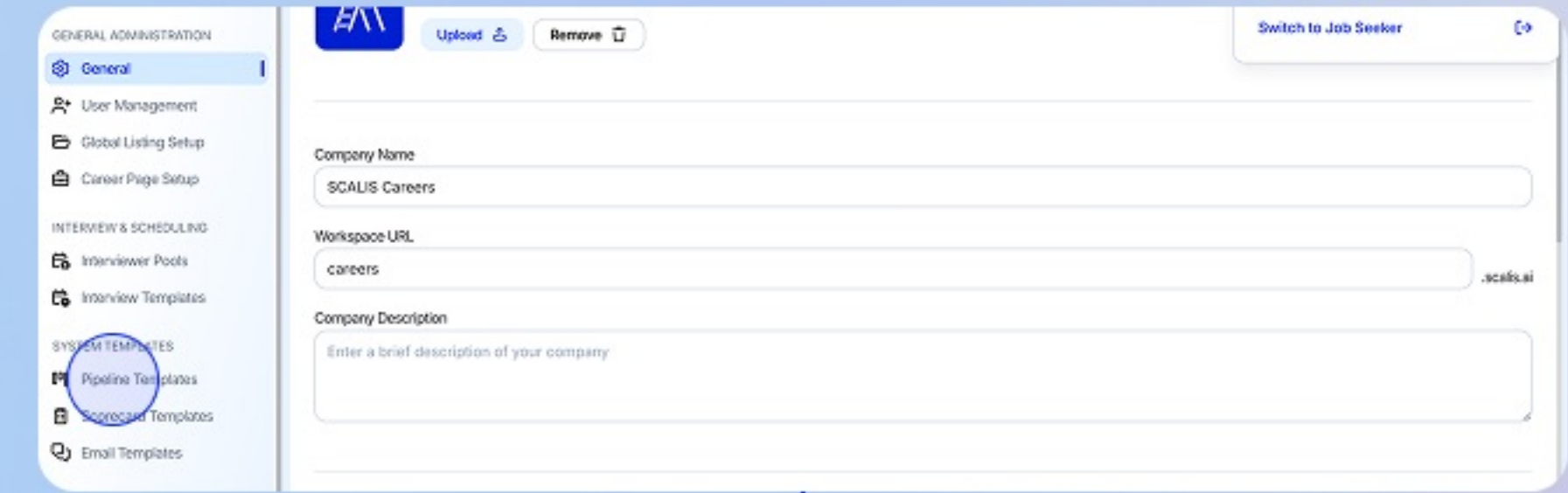
Scheduling Logic Scheduling Logic ▾

STEP 2

Creating a Pipeline Template

Pipeline templates help your hiring team maintain a consistent hiring process across job requisitions.

1. Navigate to your **Company Settings** and Click **“Pipeline Templates”**.
2. You’ll be redirected to your Pipeline Templates settings. Click **“Create Pipeline.”**
3. If you need help creating a new Pipeline, navigate to Step 1.
4. Once your new template is saved, you can use it to update an existing pipeline or adding it to a new job.

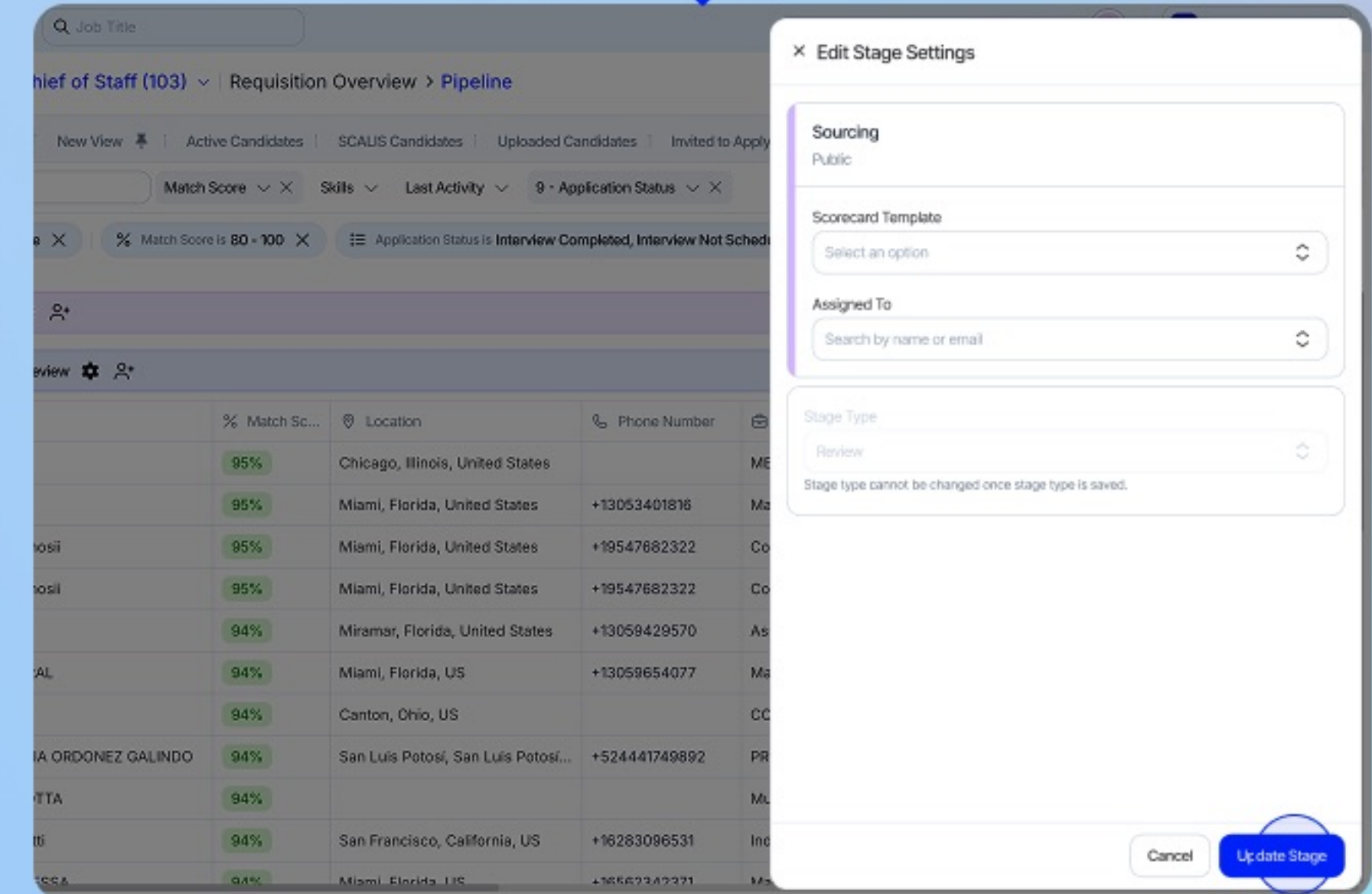
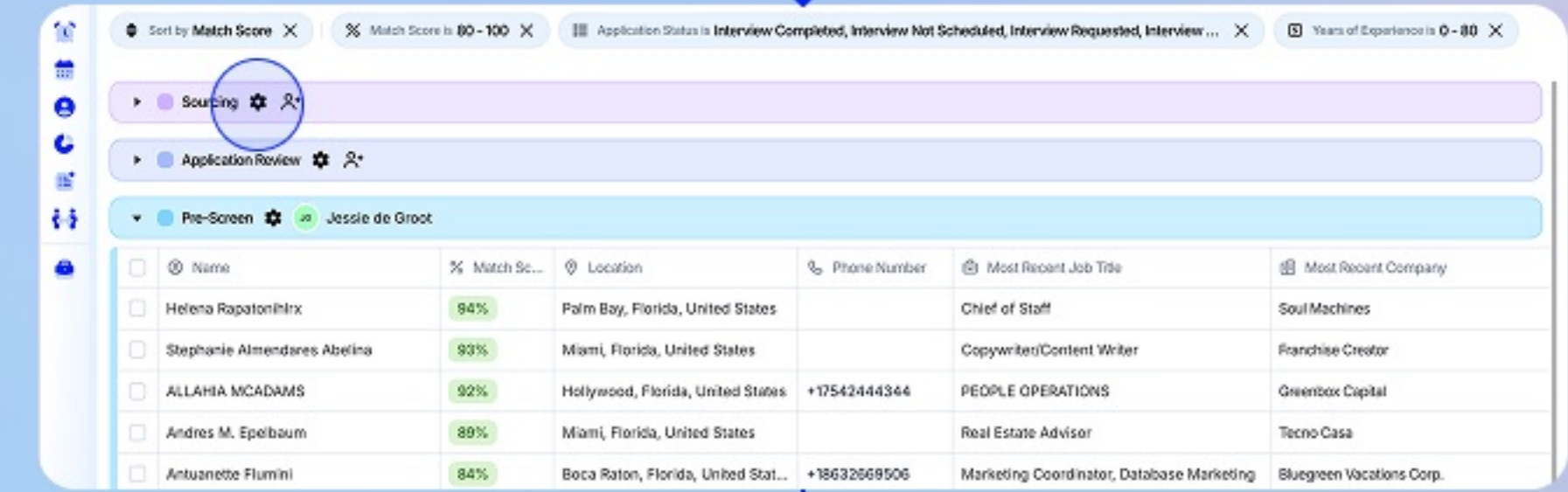
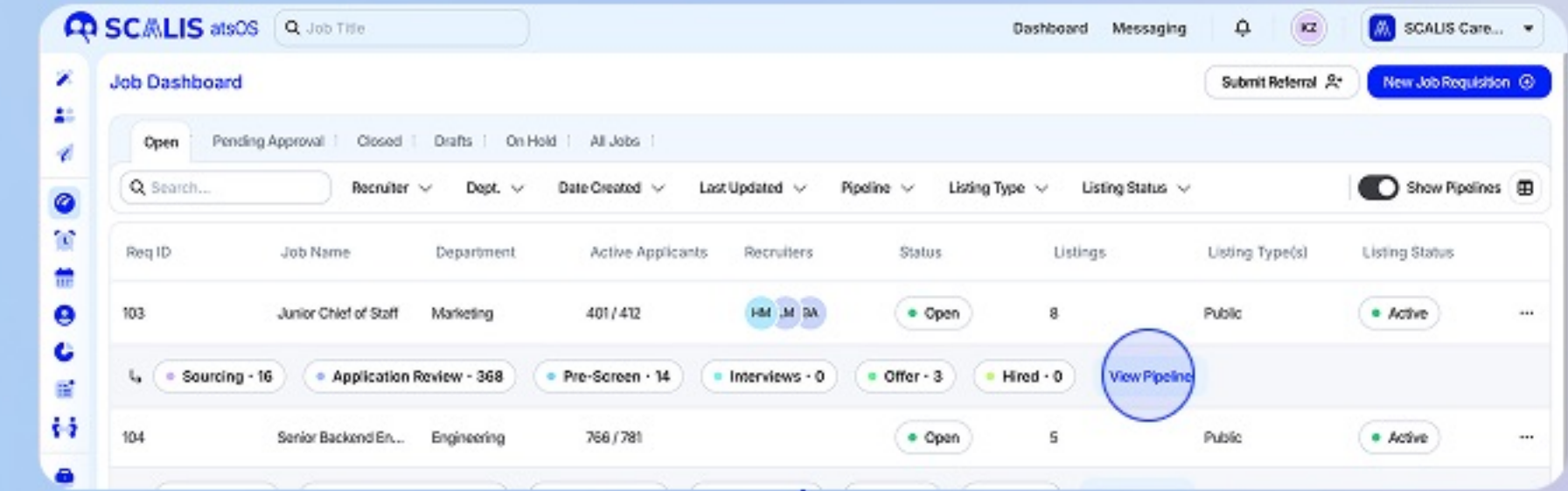


STEP 3

Pipeline Stage Settings

You can customize the settings for each stage within your Pipeline Milestones.

1. From your Job Dashboard, select the job whose hiring pipeline you want to update, then click “[View Pipeline.](#)”
2. Click the [gear icon](#) next to the stage name.
3. What you can update in Stage Settings depends on the stage type (which cannot be changed):
 - **Generic Stages:** Scorecard Template
 - **Review:** Reviewer, Scorecard Template
 - **Phone Screen:** Scorecard Template, Interviewer(s)
 - **Assessment:** Reviewer, Expiration Date, Scorecard Template
 - **Interview:** Scorecard Template, Interviewer(s)

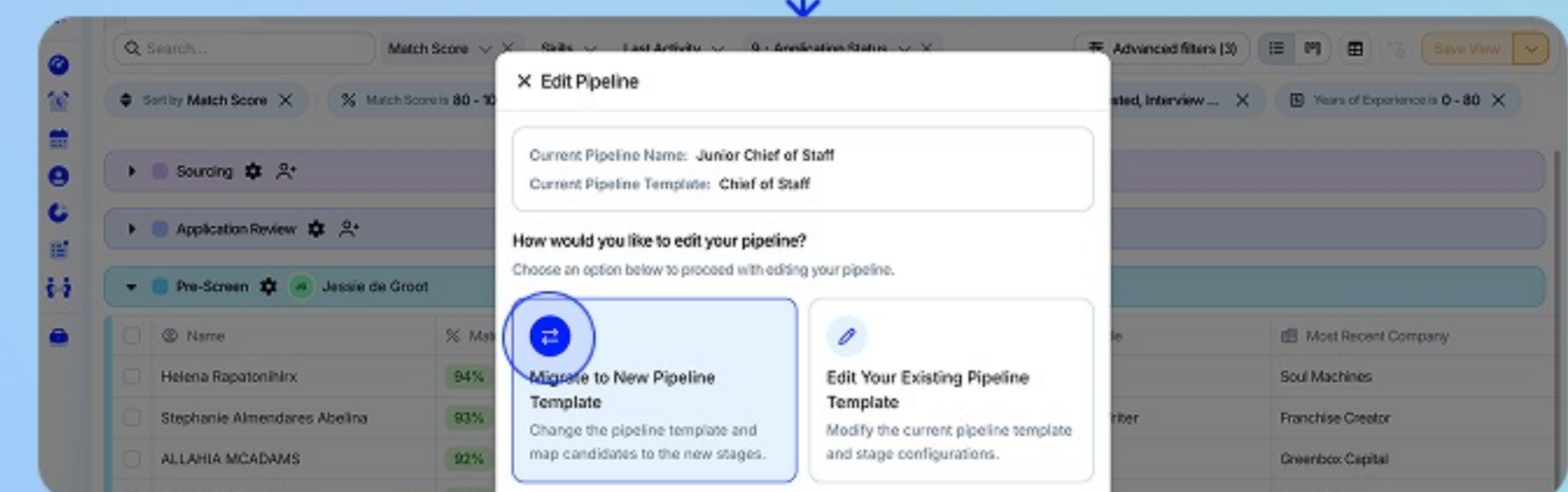
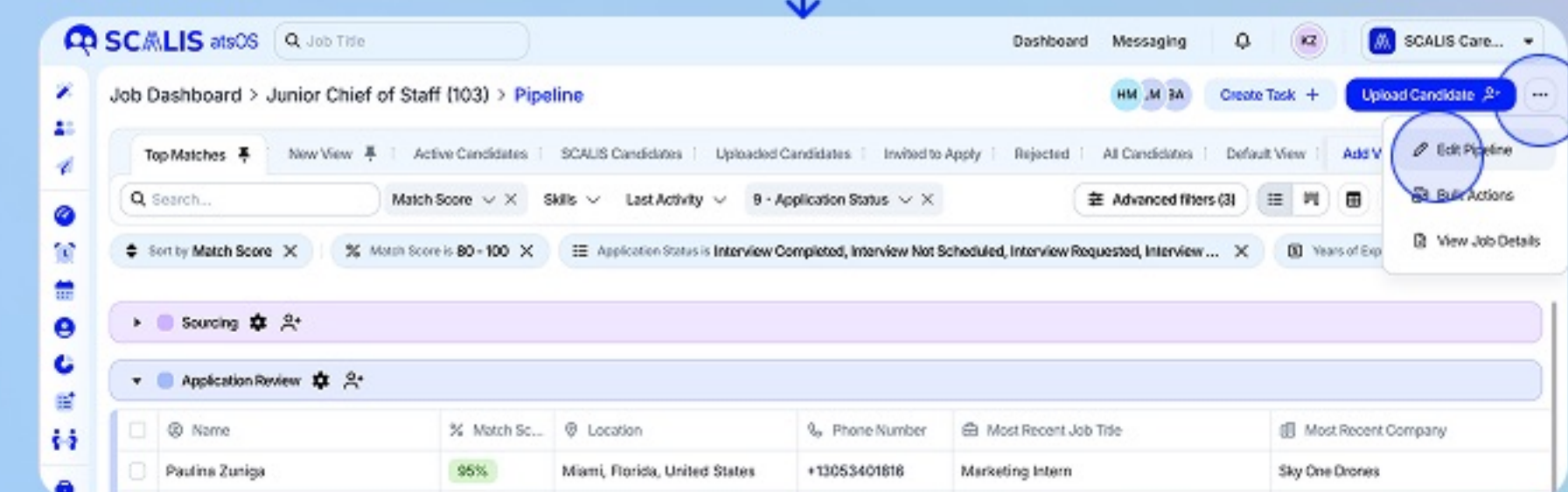
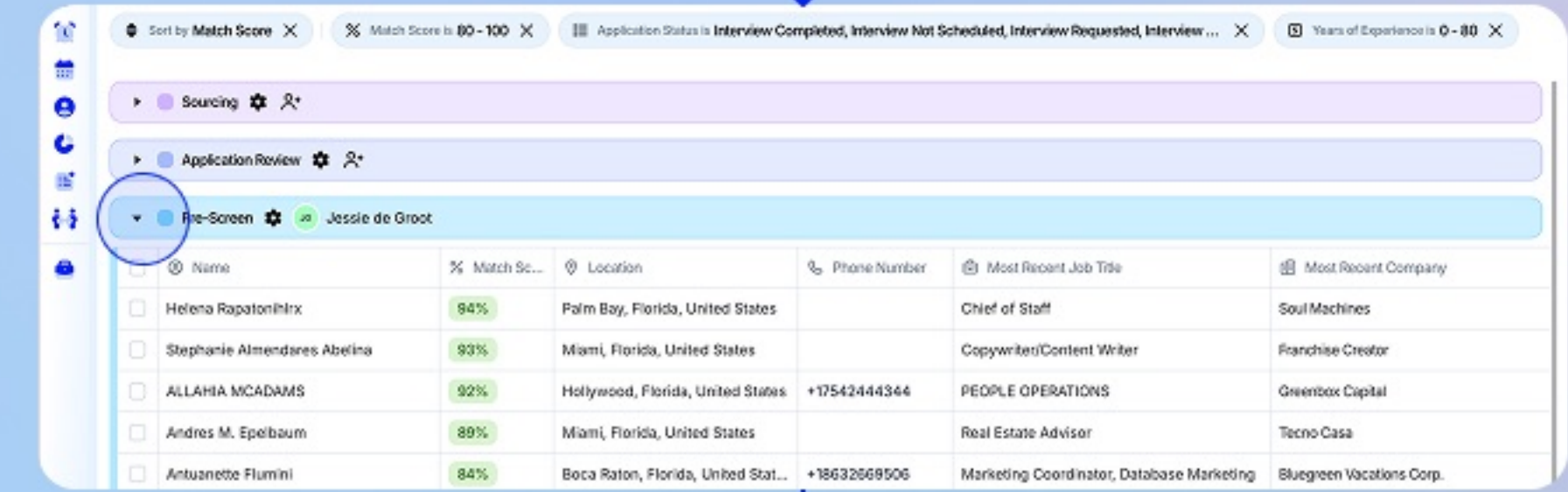
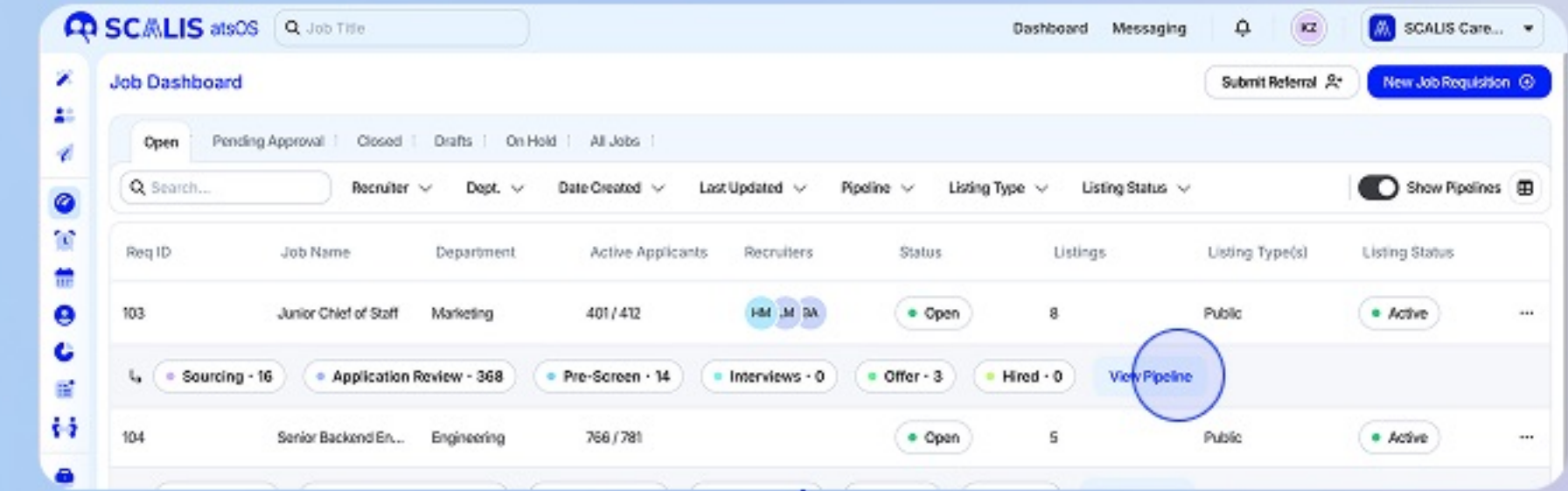


STEP 4

Migrate to a New Pipeline Template

The pipeline template can only be changed until you advance your first candidate beyond the "Application Review" stage.

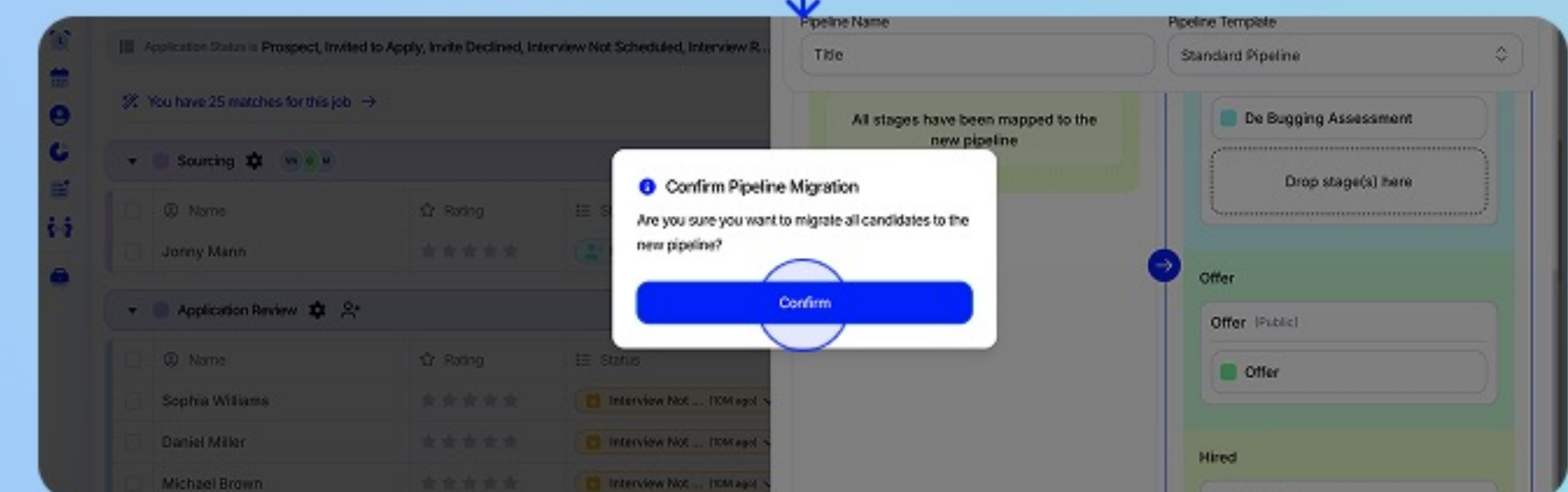
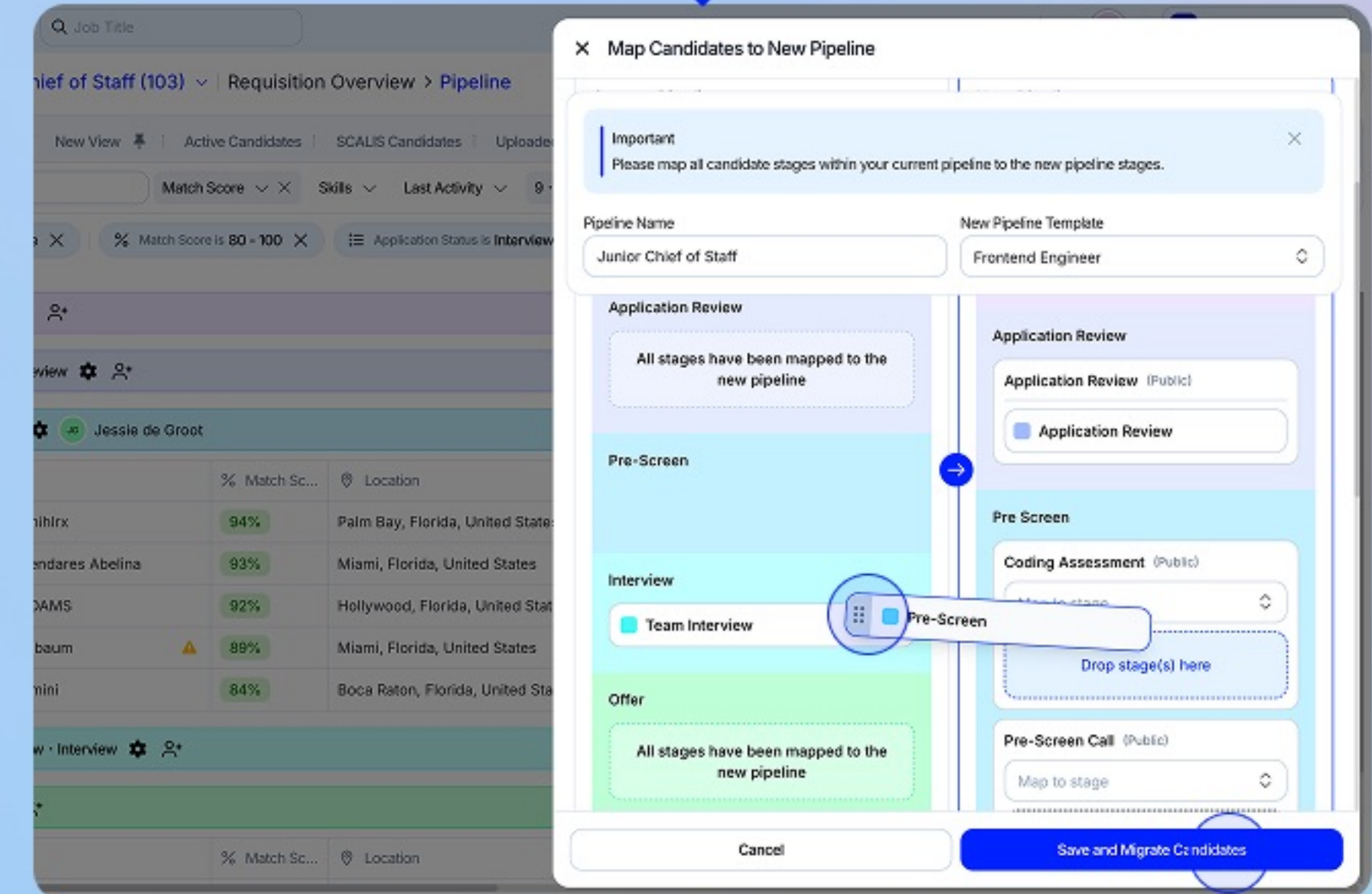
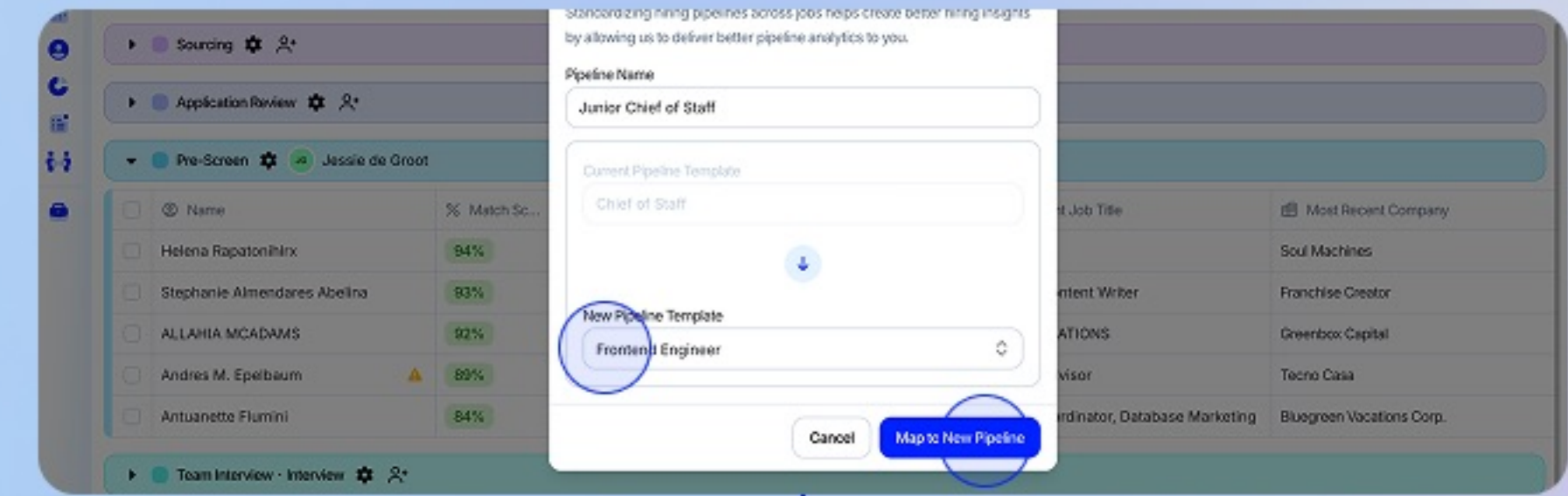
1. From your Job Dashboard, select the job whose hiring pipeline you want to update, then click **"View Pipeline."**
2. Ensure there are candidates beyond the **Application Review** stage.
3. Click the ellipsis (...) button and select **"Edit Pipeline."**
4. Select the **"Migrate to New Pipeline Template"** option and continue.



STEP 4.1

Migrate to a New Pipeline Template

5. Choose the new pipeline template you want to apply to this job. After selecting the template, click **“Map to New Pipeline”**.
6. Drag and drop the candidate stages from your current pipeline that you want to include in the new one.
7. Click **“Save and Migrate Candidates,”** then **“Confirm.”**
8. Success! Your candidates have been successfully migrated to the new pipeline.

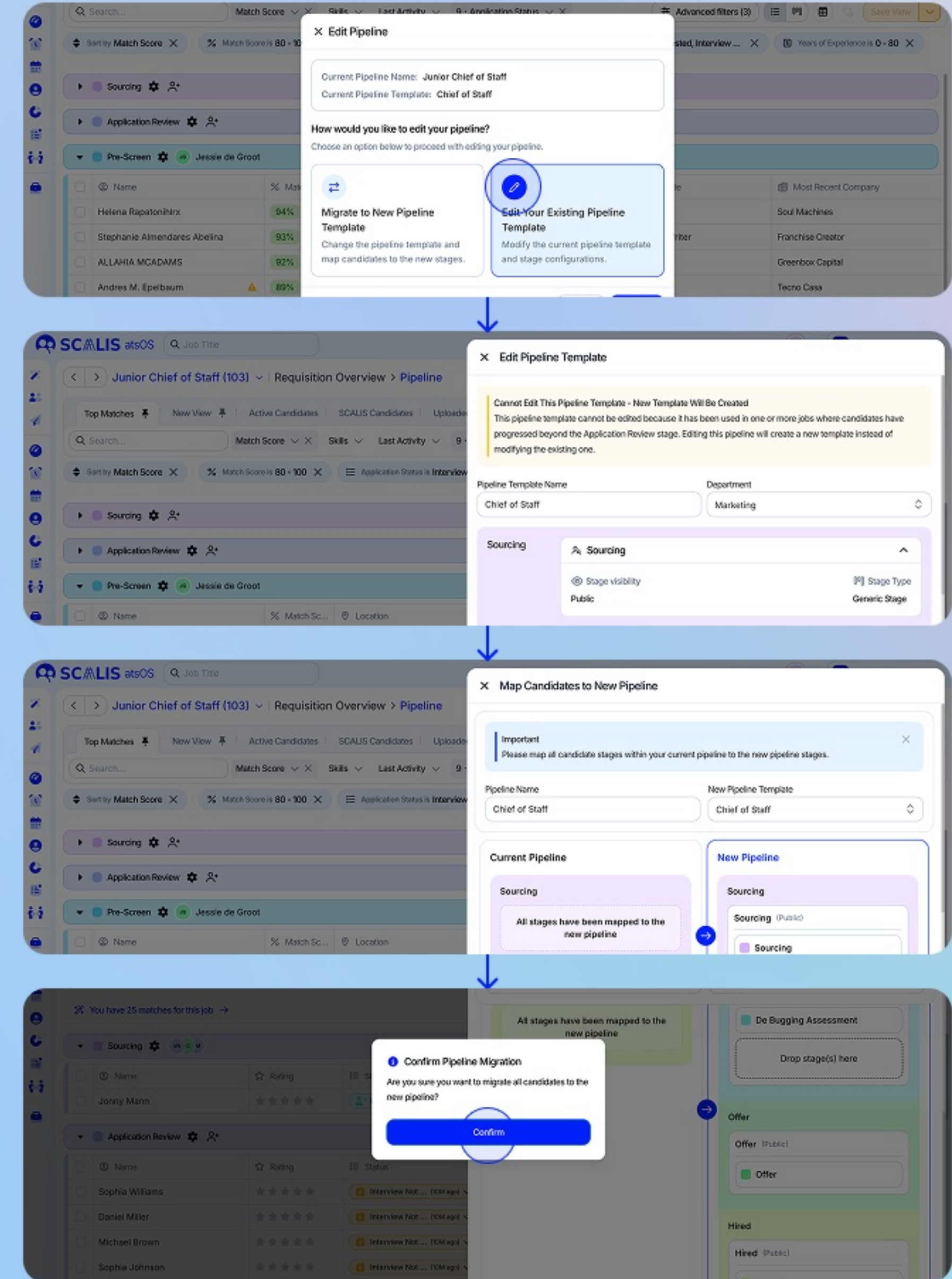


STEP 5

Edit Existing Pipeline Template

A Pipeline Template becomes locked from editing once it has been used in a job where candidates have progressed beyond the Application Review stage.

1. Select the **“Edit Your Existing Pipeline”** option and continue.
2. An Edit Pipeline Template drawer will open, allowing you to adjust the template settings. Keep in mind that making changes will generate a new template rather than updating the existing one. Click **“Save”** to proceed.
3. Drag and drop the candidate stages from your current pipeline that you want to include in the new one.
4. Click **“Save and Migrate Candidates,”** then **“Confirm.”** Your candidates will be migrated to the new pipeline.



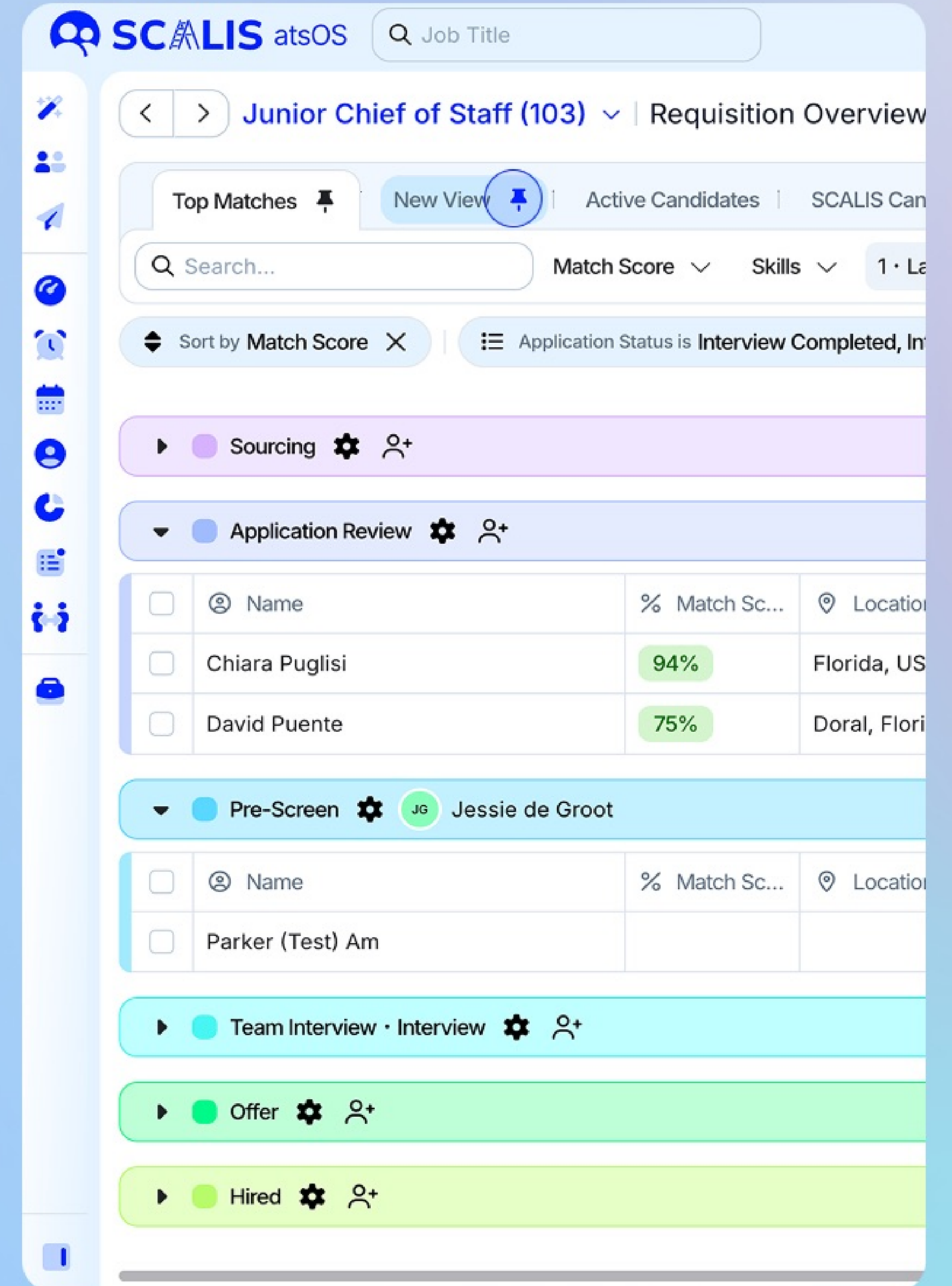
STEP 6

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.



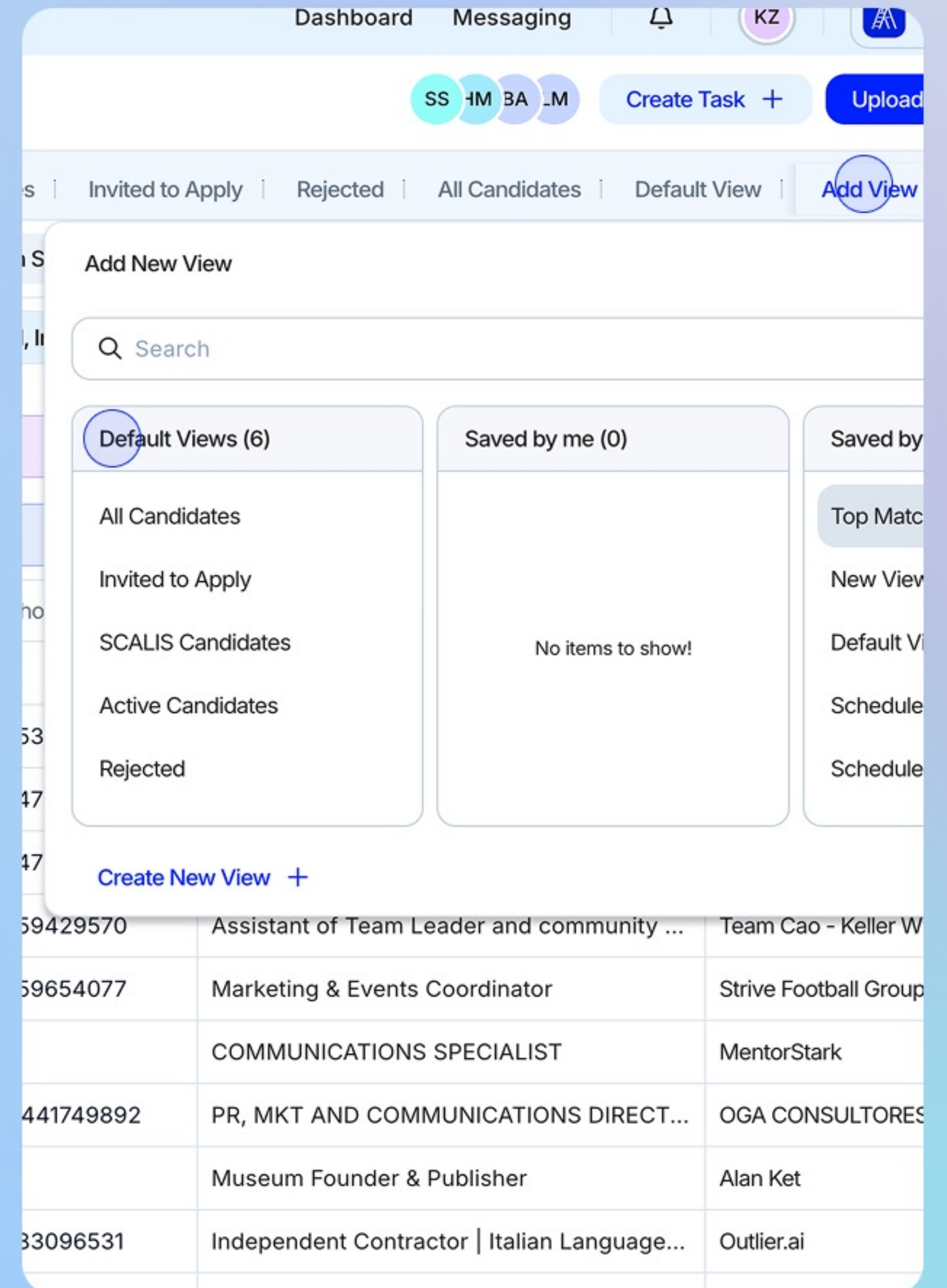
STEP 6.1



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.



Dashboard Messaging  

SS HM BA LM Create Task + Upload

s | Invited to Apply | Rejected | All Candidates | Default View | Add View

Add New View

Q Search

Default Views (6)

- All Candidates
- Invited to Apply
- SCALIS Candidates
- Active Candidates
- Rejected

Saved by me (0)

No items to show!

Saved by

- Top Match
- New View
- Default View
- Schedule
- Schedule

Create New View +

59429570	Assistant of Team Leader and community ...	Team Cao - Keller W
59654077	Marketing & Events Coordinator	Strive Football Group
	COMMUNICATIONS SPECIALIST	MentorStark
441749892	PR, MKT AND COMMUNICATIONS DIRECT...	OGA CONSULTORES
	Museum Founder & Publisher	Alan Ket
33096531	Independent Contractor Italian Language...	Outlier.ai

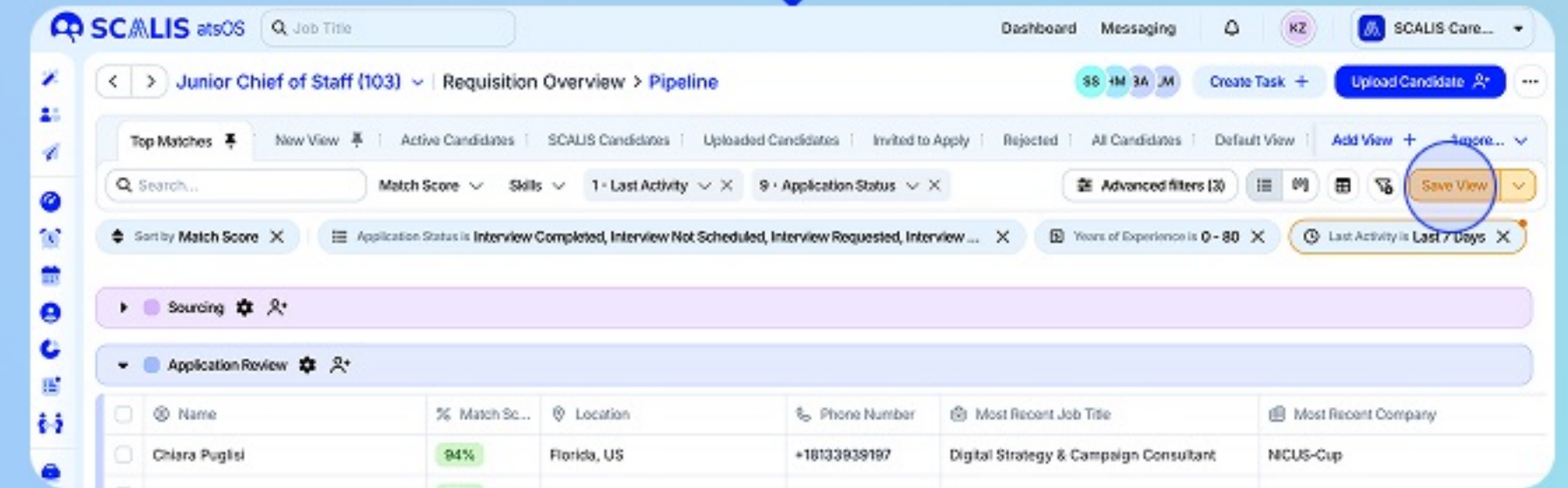
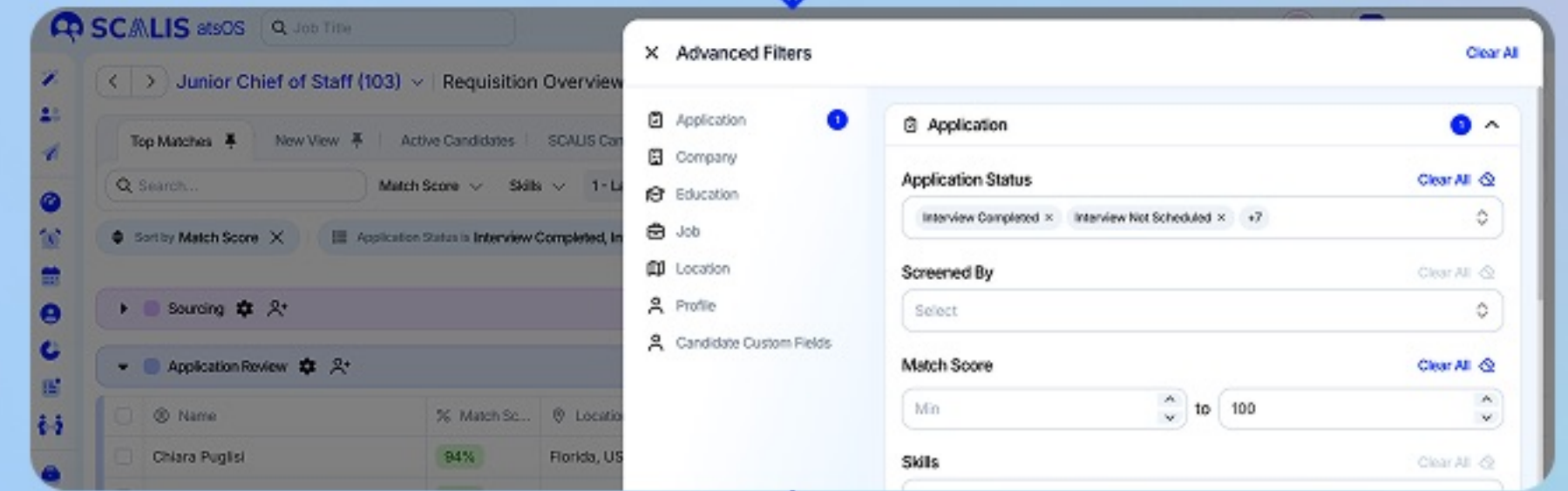
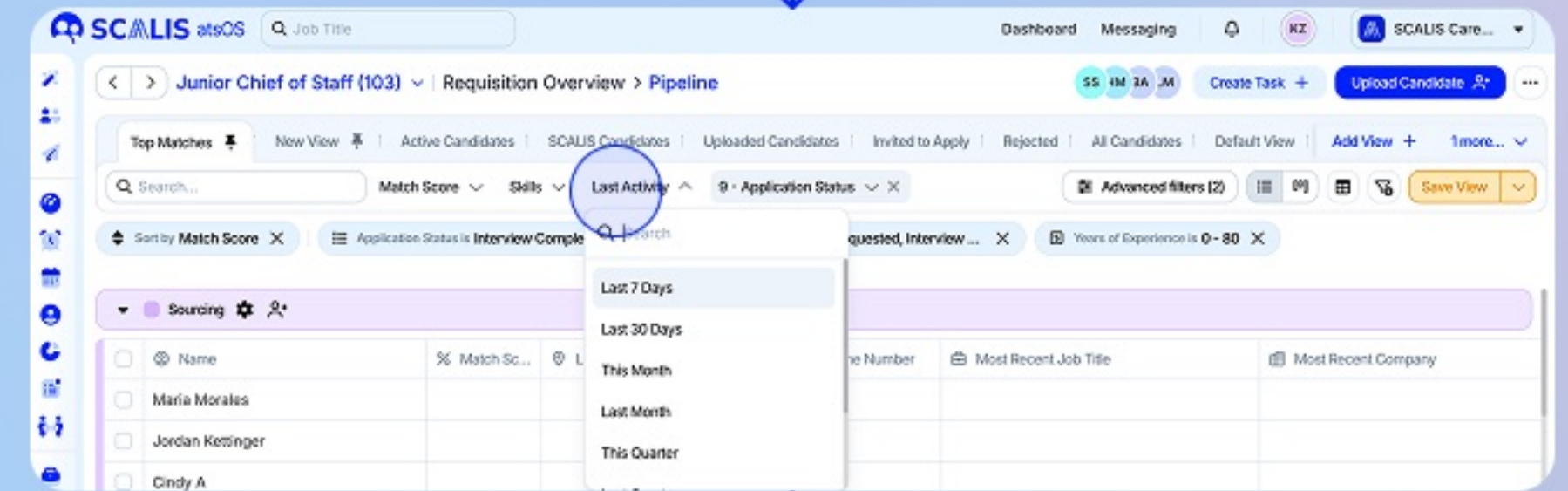
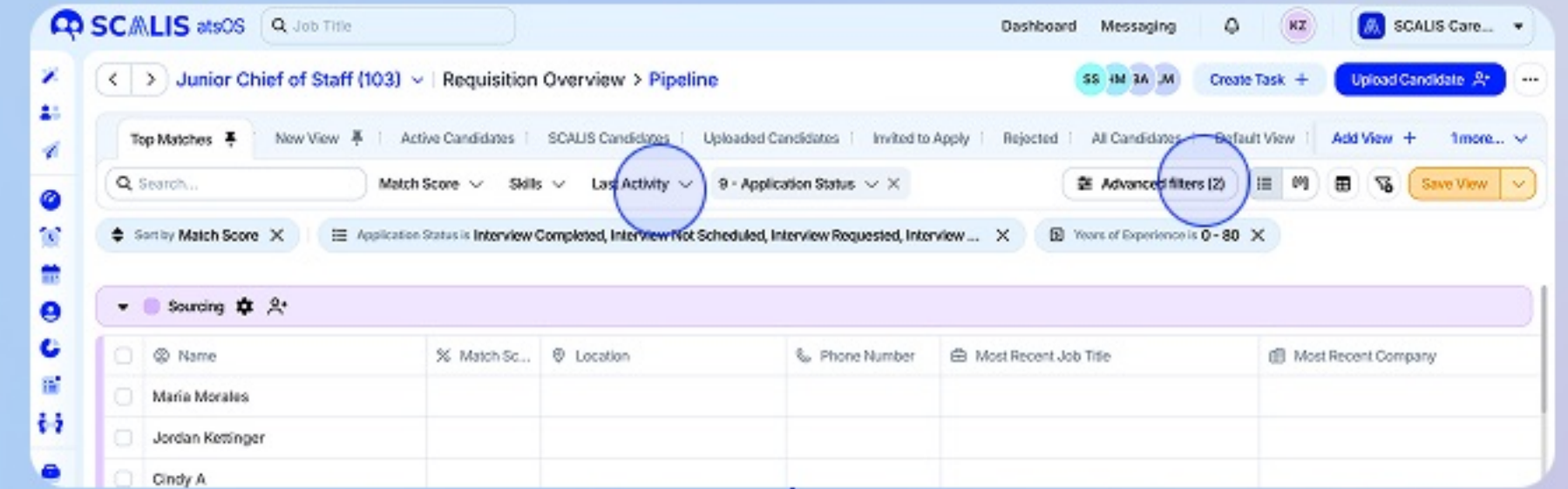


STEP 6.2

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.
3. 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

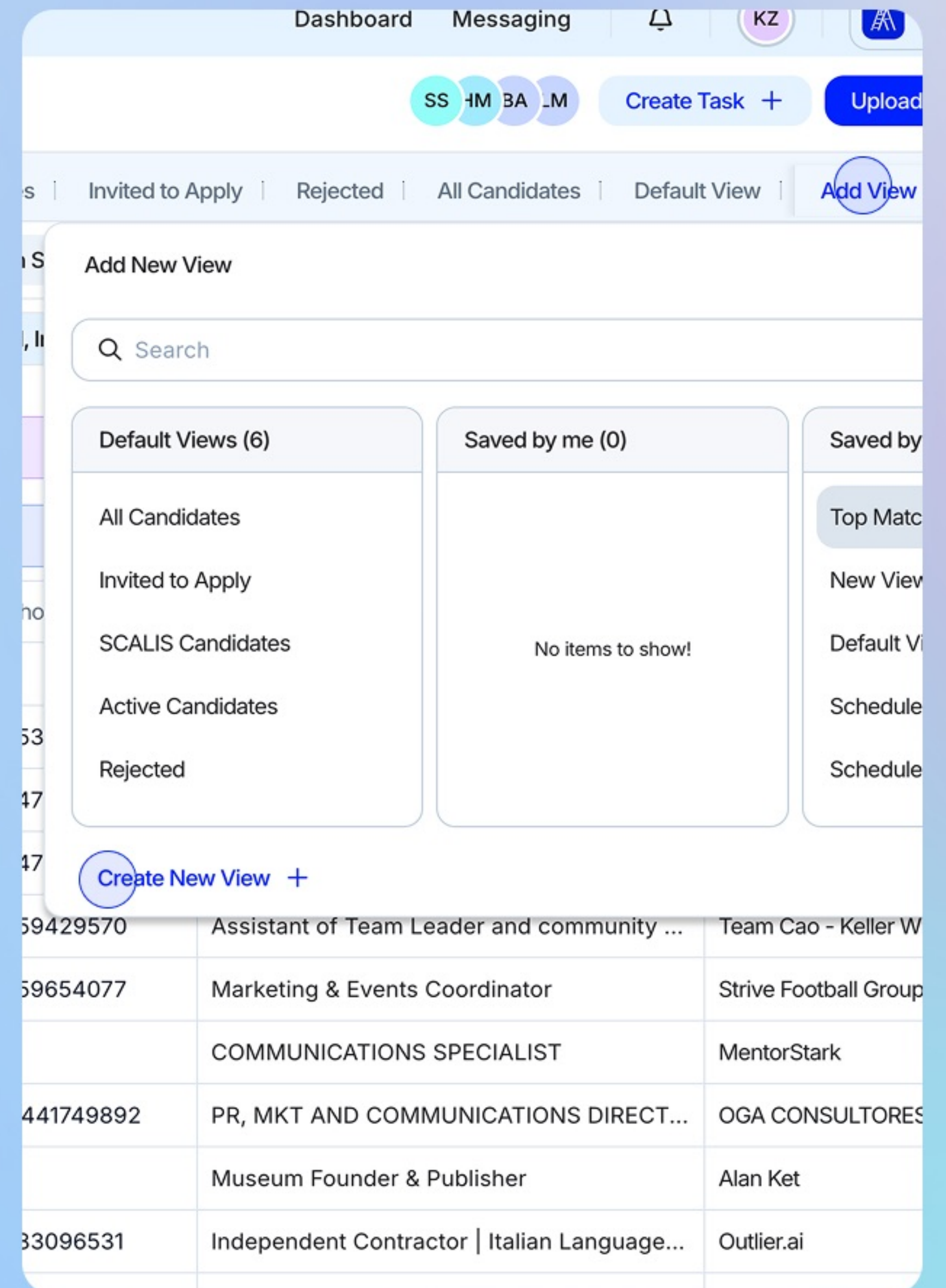
+ Add Views from Other Jobs or Create One from Scratch

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.



STEP 7

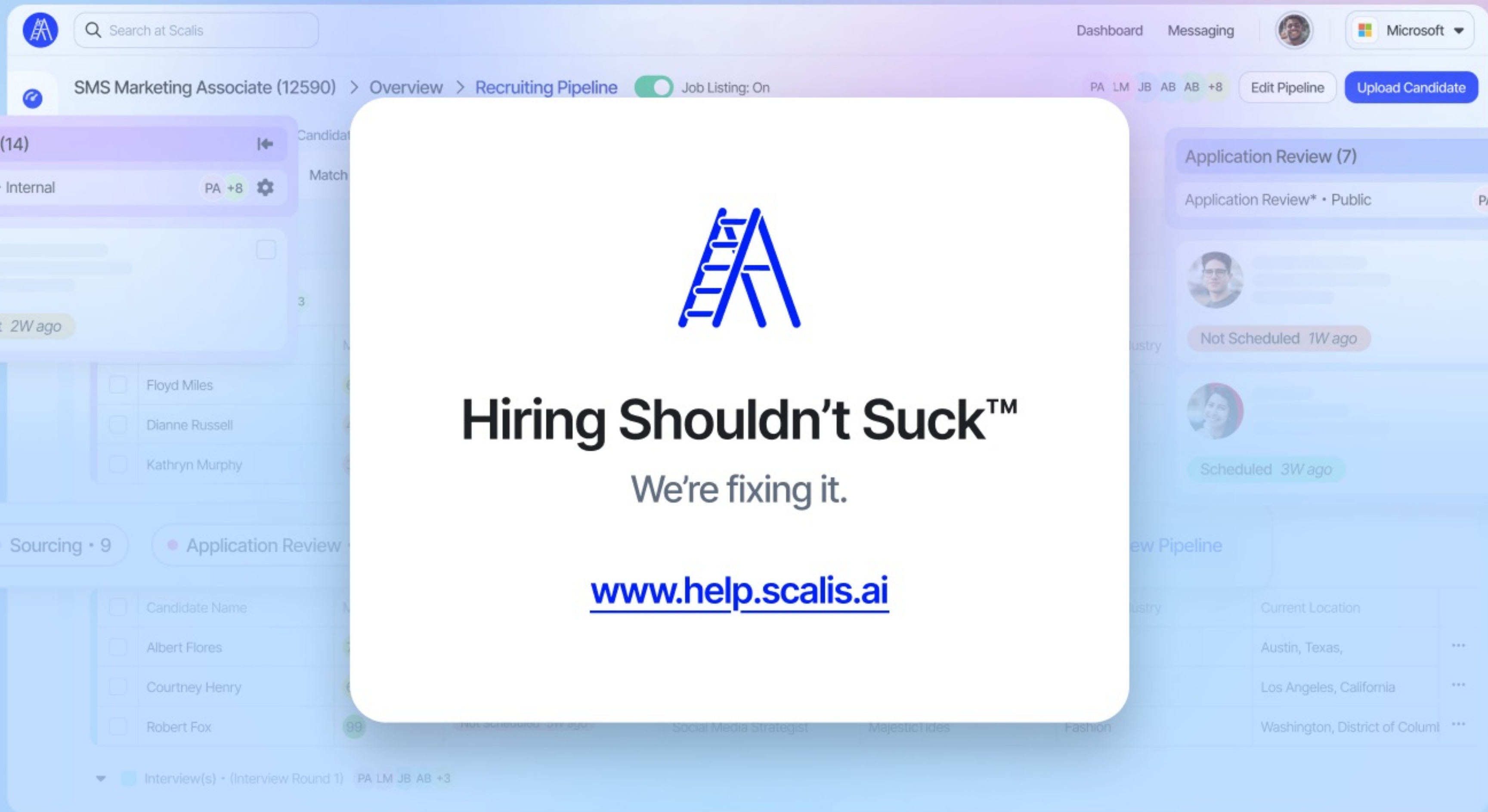
Editing a Pipeline When a Template is Selected

When configuring your Pipeline Setup with a Linked Pipeline Template, any edits will automatically unlink it from the template, while preserving all existing data.

1. After selecting a Pipeline Template during the Requisition Creation flow, you can edit the Pre-Screen, Interview, and Offer stages.
2. Click the **pen icon** to open a drawer where you can update the selected stage. Make your changes and click **“Update Stage.”**
3. When you proceed, the Pipeline Template will be unlinked. All existing data will be preserved, and a new template will be created.

The image illustrates the process of editing a pipeline stage when a template is selected. It consists of four sequential screenshots from the SCALIS atsOS interface, connected by downward-pointing arrows. The first screenshot shows the 'New Requisition' flow with 'Pipeline Setup' selected, and a 'Link Pipeline Template' button circled. The second screenshot shows the 'Pre-Screen' stage being edited, with a pen icon circled. The third screenshot shows the 'Update Stage' drawer for an 'Interview Round 1' stage, with the 'Update Stage' button circled. The fourth screenshot shows a confirmation dialog box titled 'Unselect Pipeline Template' with a 'Proceed' button circled.





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www.help.scalis.ai