

Profile card showing a candidate's match percentage of 100% and a five-star rating. The card includes a profile picture, a progress bar, and a green arc indicating the 100% match percentage.

Onboarding  
1:30-2:00pm

Interview  
5:00-6:00pm

HR Training  
09:45-11:00am

GETTING STARTED

# SCALIS

## Onboarding Guide

Application Review (7)  
Application Review • Public PA +8

Not Scheduled 1W ago 79

Scheduled

Sourcing (14)  
Sourcing • Internal PA +8

Prospect 2W ago

Navigation bar with pipeline stages: Sourcing • 9, Application Review • 2, Pre-Screen • 4, Interview(s) • 7, Offer • 2, Hired • 0, and a View Pipeline button.

## INDEX

# Summary

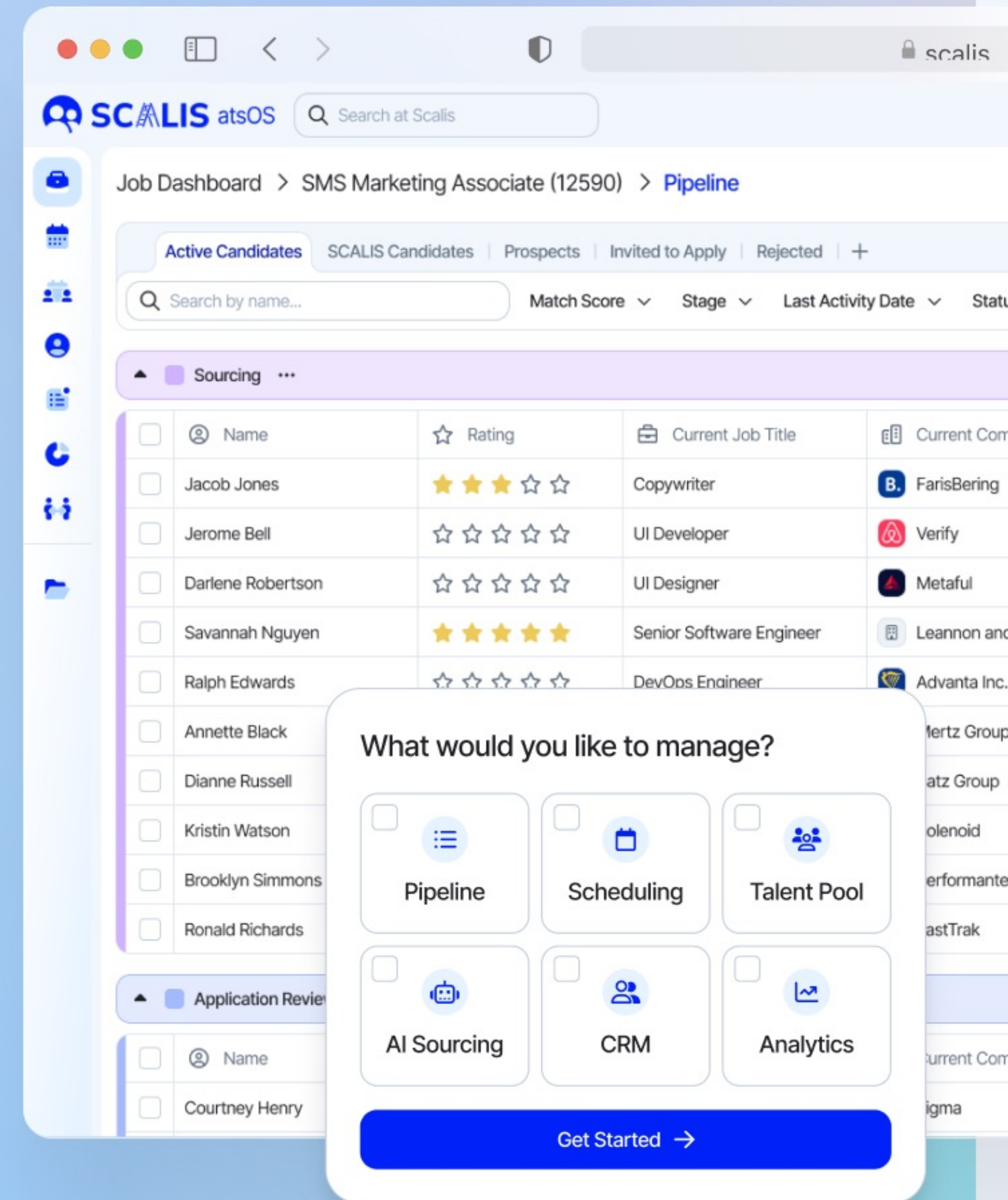
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SCALIS

Hiring Shouldn't Suck™

2025



Job Dashboard > SMS Marketing Associate (12590) > Pipeline

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 🌐 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	60%	in 🌐 🌐	Invite Declined 5d ago	Chemicals

# Welcome to SCALIS!

## Getting Started with Your Employer Account

We're thrilled to have you on board! Follow this step-by-step guide to set up your SCALIS account and make the most of the platform.

## STEP 1

# Setting Up Your Account and Logging In

## 1.1 Creating Your SCALIS Profile

Each SCALIS user has a universal profile, usable as both a job seeker and an employer.

- Go to [scalis.ai](https://scalis.ai).
- Click [Sign Up](#).
- Enter your email and choose a secure password.
- Click [Create Account](#).
- Verify your email to complete your profile setup.

### Create your account

Enter your information below to create an account.

Email

Password

Confirm Password

Use at least 8 characters, with uppercase, lowercase and number.

[Create account](#)

By continuing, you agree to our [Terms & Conditions](#) and [Privacy Policy](#), and agree to receive email job alerts.

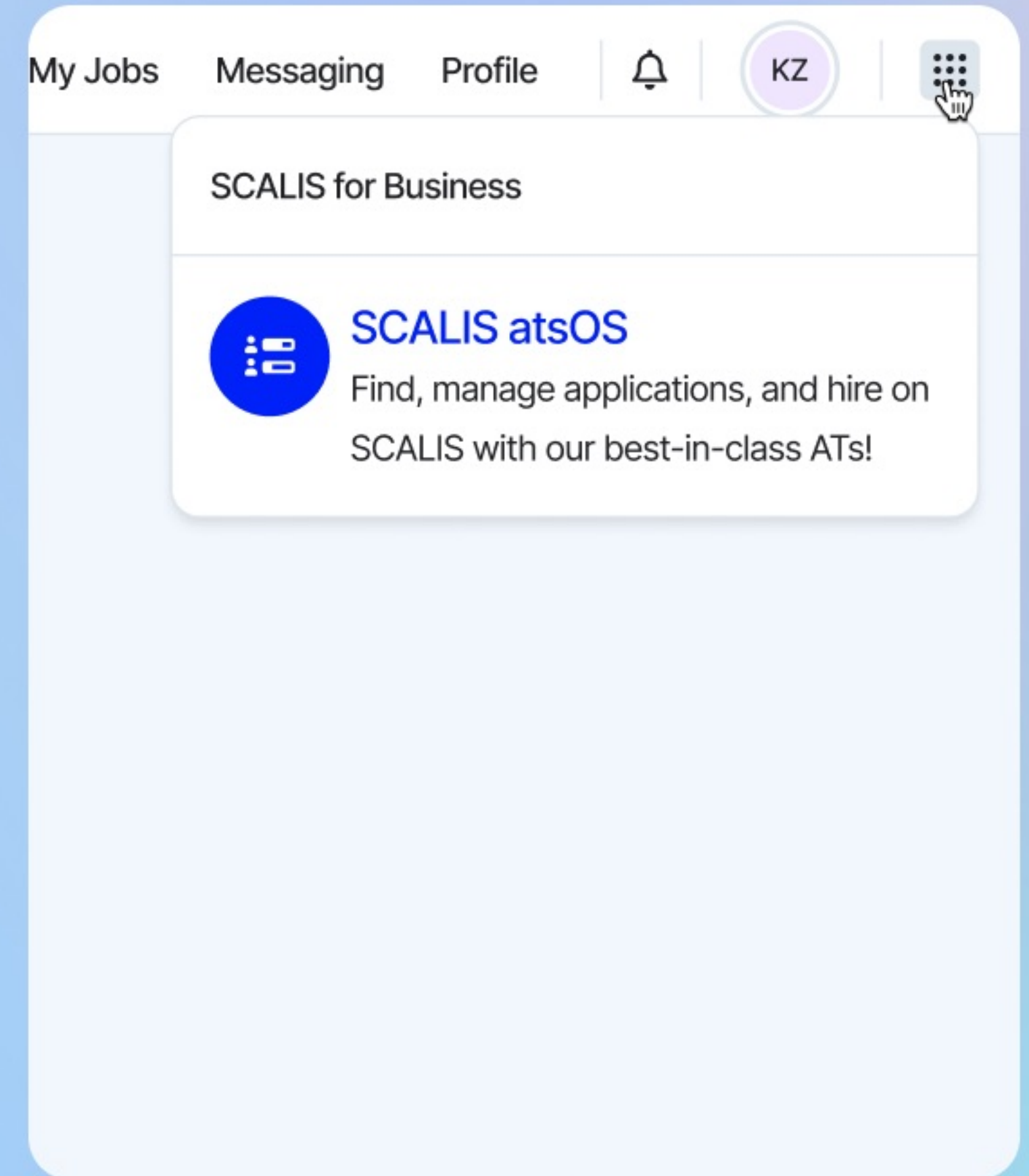
Already have an account? [Sign in!](#)



## STEP 1.2

# Creating Your Company Workspace

- Click **SCALIS atsOS** from the top right corner of your navigation bar.
- Enter your company name and choose your workspace URL.
- Add your company location. (Additional office locations can be added later.)
- Provide your company information and hiring goals. (This helps SCALIS's algorithm provide better matches and allows our customer success team to support your hiring needs effectively.)

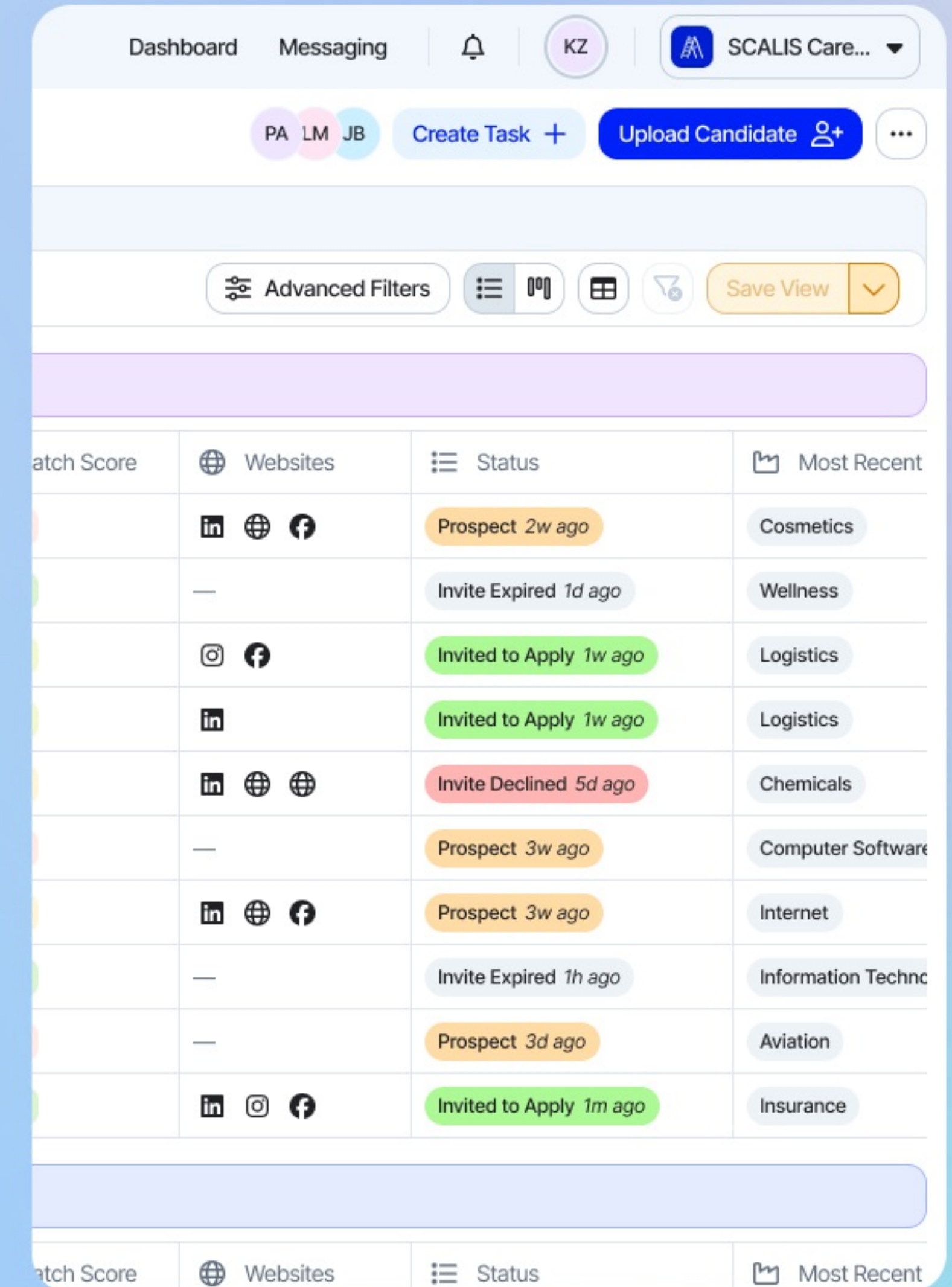


## STEP 2

# Navigating SCALIS

## Top Navigation Bar

- **Dashboard:** Your central hub for managing all jobs you're assigned to. From the Dashboard, you can quickly view job statuses, view pipelines, and monitor progress across active requisitions.
- **Messaging:** An integrated messaging system that allows you to communicate directly with candidates within the SCALIS platform. Use Messaging to answer questions, and provide updates seamlessly.



## STEP 2

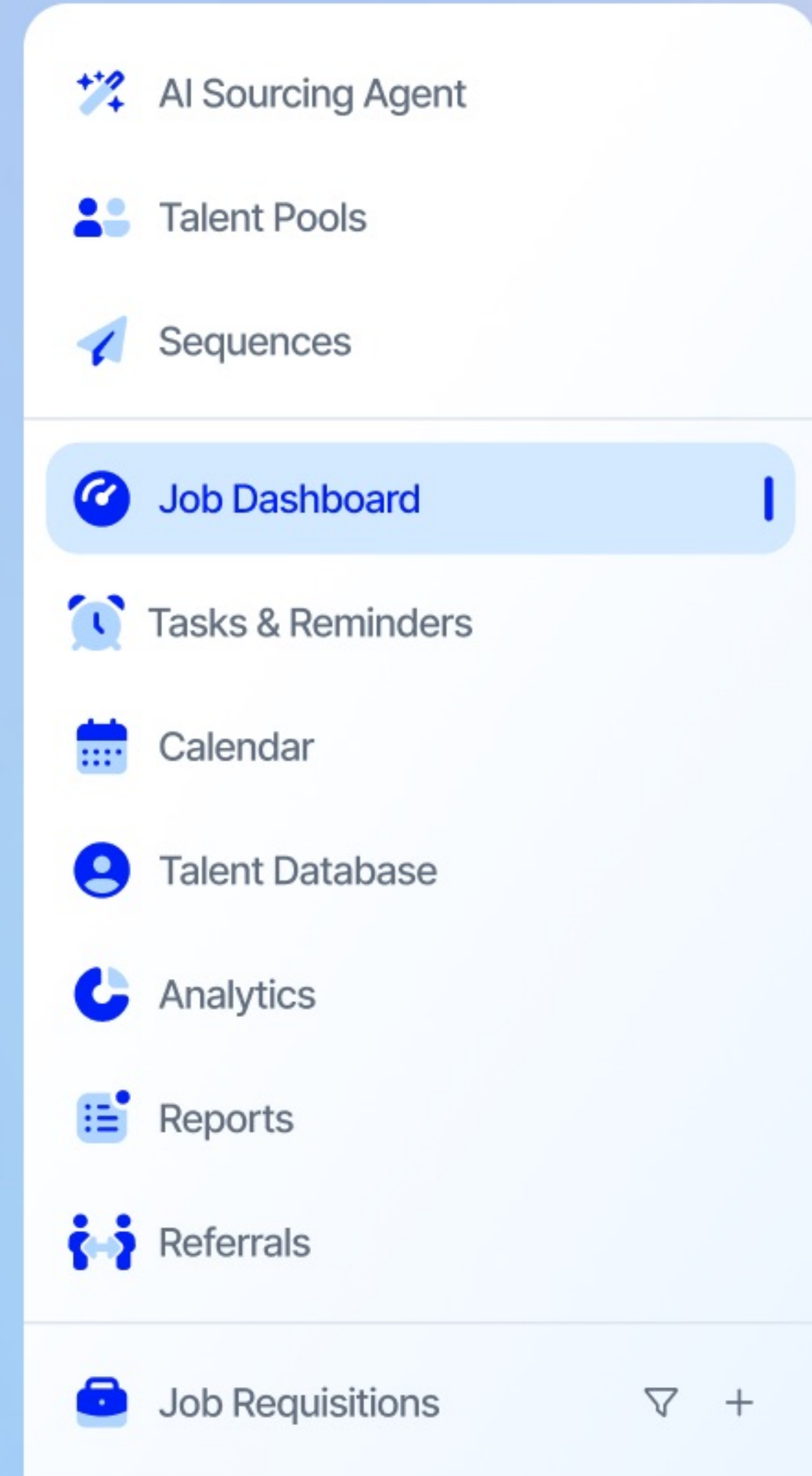
# Navigating SCALIS

## SCALIS CRM

- **AI Sourcing Agent:** Your Agentic AI Recruiting Partner — from initial sourcing to final placement.
- **Talent Pools:** Shortlists of candidates you want to stay connected with.
- **Sequences:** Create, organize, and manage email sequences to engage specific prospects over time.

## SCALIS ATS

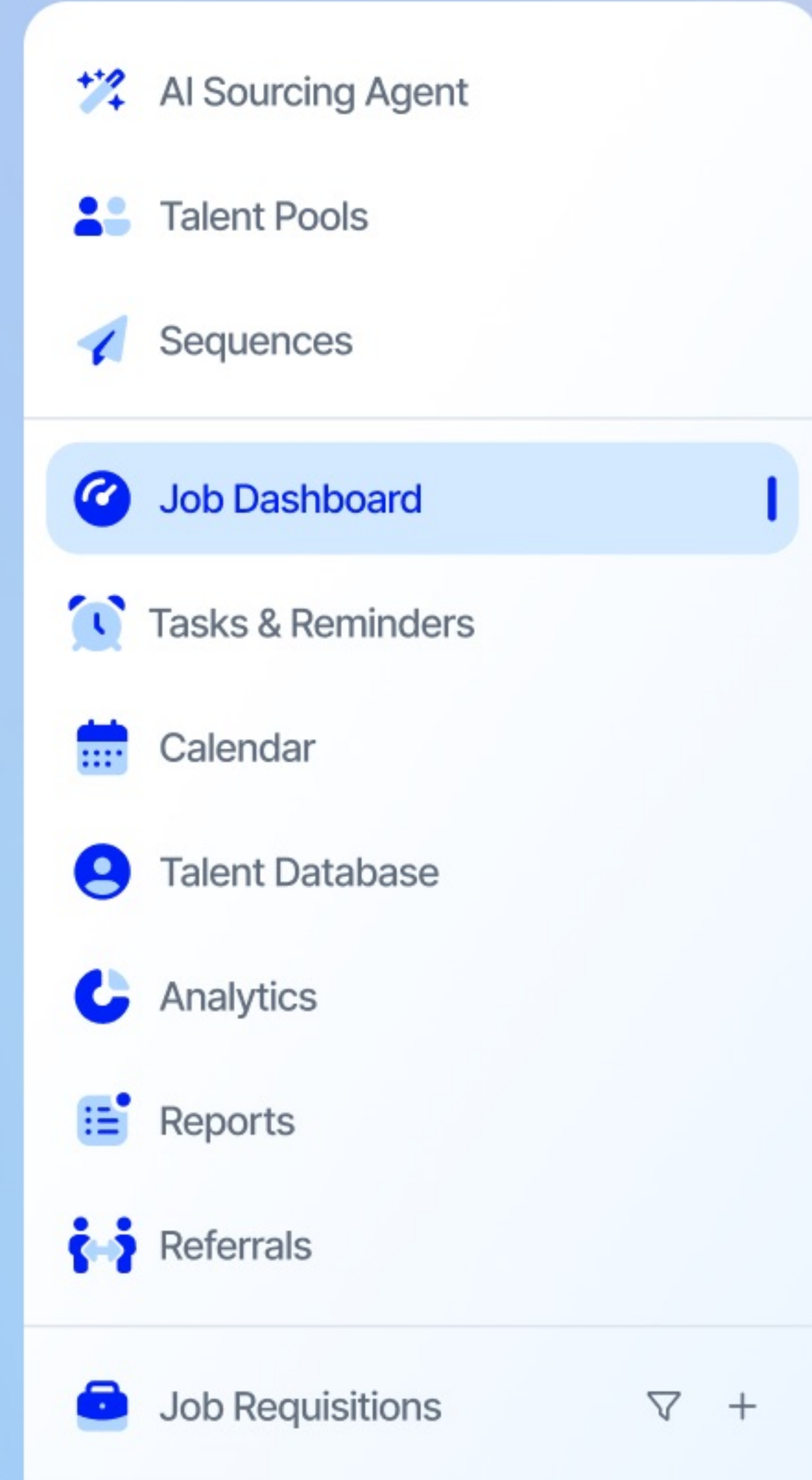
- **Job Dashboard:** Your central hub for managing all jobs you're assigned to.
- **Tasks & Reminders:** Stay on top of your to-dos with task tracking and automatic reminders.



## STEP 2

# Navigating SCALIS


- **Calendar:** View and manage your schedule, including SCALIS and non-SCALIS events.
- **Talent Database:** Manage your candidate database and explore potential talent.
- **Analytics:** Track key metrics and performance data for informed decision-making.
- **Reports:** Generate detailed reports to review performance, track progress, and share insights with your team.
- **Referrals:** Share and track referrals made by users.

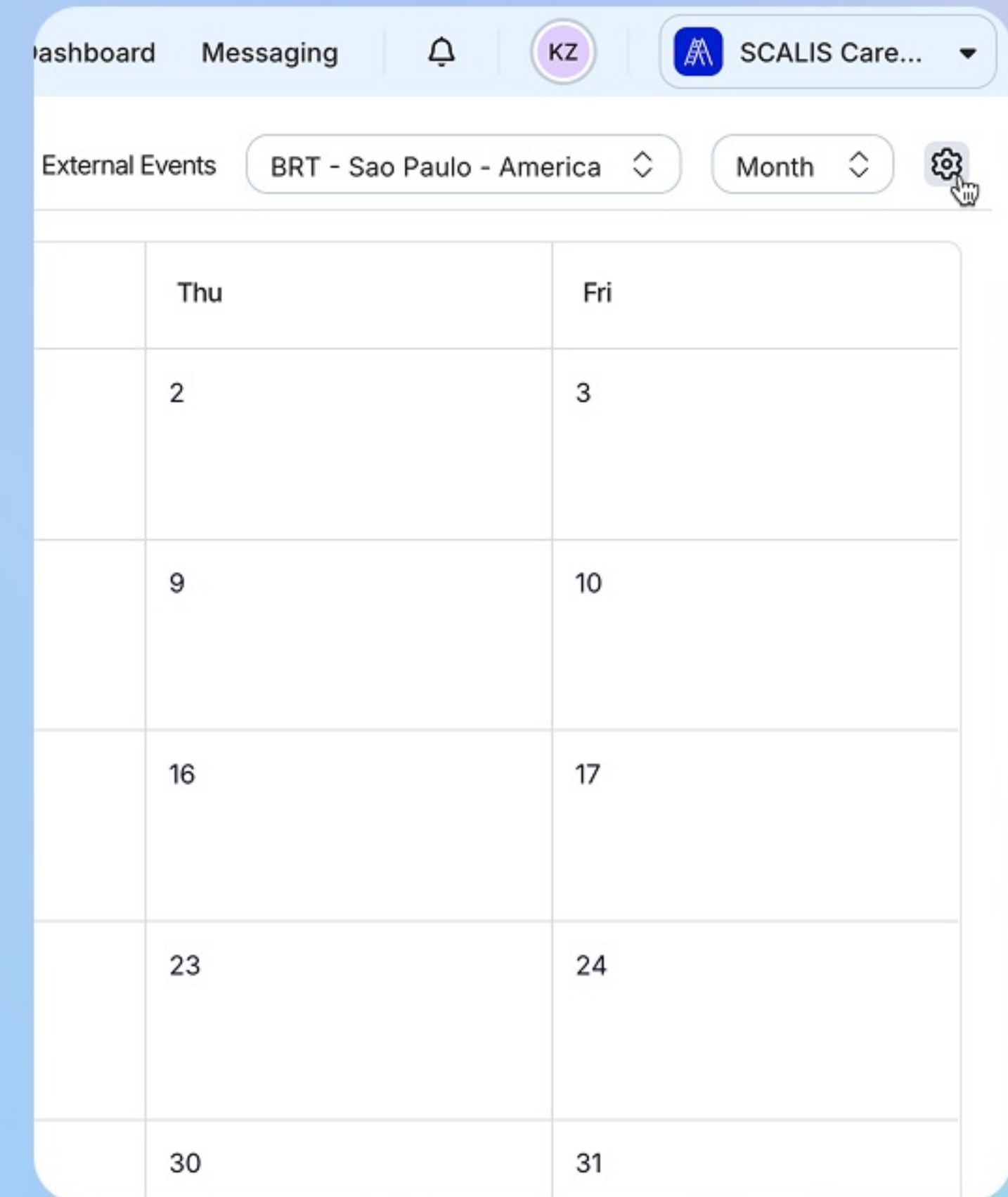


## STEP 3

# Connecting Your Calendar

- Go to the [SCALIS Calendar](#) from the Side Navigation Bar.
- Click the [Gear](#) icon in the top right.
- Click [Connect](#) and choose your calendar provider to sync your schedule.


 *SCALIS separates SCALIS events from non-SCALIS events for a clear, organized view.*



## STEP 4

# Inviting Team Members

- Go to [Company Settings](#).
- Click [User Management](#) tab, [Invite New User](#) and enter each team member's email address.
- Assign the most appropriate role for their responsibilities.

 *Need guidance? See the [Role-Based Permissions Overview](#) here.*

× Invite members to your hiring workspace

Invite with email\*

Ex: email@example.com, email2@example.com...

Super Admin

Admin

Member

Guest

Settings

YOUR PREFERENCES

✉ Email Settings

📅 Calendar Settings

GENERAL ADMINISTRATION

⚙ General

👤 User Management

📁 Global Listing Setup

📅 Career Page Setup

INTERVIEW & SCHEDULING

📅 Interviewer Pools

📅 Interview Templates

SYSTEM TEMPLATES

📄 Pipeline Templates

📄 Scorecard Templates

📄 Email Templates

General

Company Information

Offices

Departments



Company Logo

Your file should be a JPEG, JPG or PNG.

Upload 📁

Remove 🗑

Company Name

SCALIS Careers

Workspace URL

careers

.scalis.ai

Company Description

Enter a brief description of your company

# Configure Company Settings

# Configure Company Settings

## 1. Access Company Settings

- Click your [Workspace Avatar](#) (top right) and select [Company Settings](#) from the dropdown menu.

## 2. Upload Company Logo

- In the [General](#) section, select [Upload Logo](#) under [Company Information](#) if no logo is present.

## 3. Configure Company Offices

- Under [General Company Settings](#), open the [Offices](#) tab to view the initial address and click [Add Office](#) to include more locations. *Tip: Use recognizable office names for company-wide clarity.*

## 4. Set Up Company Departments

- Go to the [Departments](#) tab in [General Company Settings](#) and click [Add Departments](#) to structure your departments. You can also add subordinate departments to reflect your organization's structure. *Tip: Check with HR or finance for standard department names to align reporting.*



### Job Dashboard

Submit Referral 👤+

New Job Requisition ➕

Open | Pending Approval | Closed | Drafts | On Hold | All Jobs |

Show Pipelines

Q Search... Recruiter ▾ Department ▾ Date Created ▾ Last Activity Date ▾ Pipeline ▾


Req ID	Job Name	Date Created	Department	Active Applicants	Recruiters	Status
103	Junior Chief of Staff	01/09/2025	Marketing	382 / 393	HM BA LM	Open
104	Senior Backend Engineer	01/29/2025	Engineering	767 / 781		Open
105	Staff Backend Engineer	01/29/2025	Engineering	3373 / 3408	BA CC LM JT	Open
102	Customer Success Mana...	04/04/2025	Customer Success	463 / 483	LM CC	Open
200	PIPELINE TEST	05/07/2025	Marketing	1 / 4	CC Careers Careers	Open
108	Marketing Assistant TEMP...	06/03/2025	Marketing	8 / 13	CC Careers Careers	Open

# Creating Your First Job

## STEP 1

# Create a Job Requisition

1. From your Job Dashboard, click [New Job Requisition](#).
2. Select [Create New Requisition](#) and then click [Continue](#).

 *Tip: Create a generalized job requisition that can be copied to save time creating future job requisitions.*

## Enter the Requisition Details

- **Job Status:** Make sure the job status is set to [Open](#) so you can post it.
- **Job Name:** This is for internal use only.
- **Requisition ID:** Either enter your own or click [Generate](#) to create an ID in sequential order.

### Requisition Details

Job Name  
Ex: SMS Marketing Associate

Company Department  
Select an option

Company Office (Optional)  
Select an option

Requisition ID  
Ex: 12345 [Generate](#)

Job Type  
Select an option

Job Level  
Select an option

Will this job involve traveling?  
 Yes  No

## STEP 1

# Create a Job Requisition

## Configure Openings

- **Number of Openings:** Specify the number of positions you want to fill for this requisition.
- **Opening ID:** Enter your own or click Generate for a system-generated ID in sequential order.
- **Target Hire Date:** Choose your ideal hire date (for internal use only).

## Determine Pay & Benefits

- **Compensation:** Select whether the position is hourly or salaried and enter the pay range, including any additional compensation (like a sign-on bonus or relocation assistance).
- **Benefits:** Add any benefits associated with this job requisition.


The image shows two screenshots of a web application interface for creating a job requisition. The top screenshot is titled 'Openings' and contains the following fields: 'Opening ID #' with a text input containing '100-1' and a 'Generate' button; 'Target Hire Date' with a date picker set to '08/04/2024'; and 'Opening Type' with a dropdown menu set to 'New'. Below these fields are 'Cancel' and 'Save' buttons. At the bottom of the 'Openings' section is an 'Add New Opening +' button. The bottom screenshot is titled 'Pay' and contains the following fields: 'Payment Type' with two radio button options, 'Hourly' (selected) and 'Salary'; 'Currency' with a dropdown set to '\$ USD'; 'Min \$ Amount' with a text input set to '\$ 0.00'; and 'Max \$ Amount' with a text input set to '\$ 0.00'. At the bottom of the 'Pay' section is a checkbox labeled 'Additional Compensation?'.

## STEP 2

# Entering a Job Description

You have three ways to add a job description:

1. **Manual Entry:** Type or paste in the job description text box.
2. **Use a Job Description Template:** If it's your first time, templates may not be available.
  - a) Save job descriptions as templates by checking the **"Save as New Template"** checkbox to reuse them later.
  - b) View and Edit existing Job Description templates by clicking **"Manage Job Templates"**.
3. **Generate with AI:** Input prompts to create a job description with AI and make edits as needed.

 *Note: Entering this information won't automatically make it visible on your job posting. You can decide to share it later. [Learn more about Job Descriptions vs. Job Listings here.](#)*

× Generate with AI

### Add Additional Information

We'll use the information you provided on the Job Details page to generate a suggested job description for your position using AI. Feel free to add some additional information (such as skills or responsibilities) here for us to utilize.

Tone

Select a tone



Workplace Culture (Optional)

Select workplace culture



Reports to (Optional)

i.e. Head of Product

Skills (Optional)

Placeholder text

Notes for AI (Optional)

Add any specific requirements or preferences for the job description

Include emojis in job description 🌟

Display salary in job description?

Display benefits in job description?

Cancel

Generate



## STEP 3

# Define Skills & Candidate Preferences

### 3.1 Enter Required Skills and Attributes

- List the key skills and attributes for the ideal candidate.
- For each skill, enter: Skill or Attribute Name, Years of Experience Required & Skill Level.
- Click [Add Skill](#) after entering each one.

### 3.2 Set Candidate Preferences

- Define candidate preferences to help the system recommend the best-fit candidates.

#### Skills

**Ideal Candidate Profile (External)**  
What skills and attributes should this employee have? These can include soft skills, technical skills, or desired personality traits.

Skill or Attribute Name  
Ex: Microsoft Word

Years of Experience (Optional) 0 Level (Optional) Select level

Mark as Must Have ⓘ

[Add Skill](#)

#### Candidate Preferences

**Ideal Candidate Profile (Internal)**  
Candidate Preferences are not visible on the listing. This information is for internal use only and helps improve candidate matching.

**Must Have** [Clear All](#)


Ranking ⓘ	Filter Type	Condition	Value
⋮ 1	Select	Select	Search...

[Add Filter](#) [Add Nice to Have](#)



## STEP 4

# Create a Job Listing

 *Note: Entering this information won't automatically make it visible on your job posting. You can decide to share it later.*

## Enter Listing Details

- **Internal Listing Title:** For your team's identification.
- **External Listing Title:** This is the title candidates will see.
- To show the salary on the job listing, check the **"Make Compensation Public"** box.
- **Workplace Type:** Indicate the work location or arrangement (e.g., remote, in-office).

× Add Listing Step 2/5 ↗

### Listing Details

Internal Listing Title (Internal use only)  
Ex: Chicago Listing

External Listing Title (What the applicants will see)  
Ex: SMS Marketing Associate

Make compensation public?

Workplace Type ⓘ  
In Person

Country  
United States

Address Line 1  
ex: 123 Main Street

Address Line 2 (Optional)

City / Town

State


Cancel Next



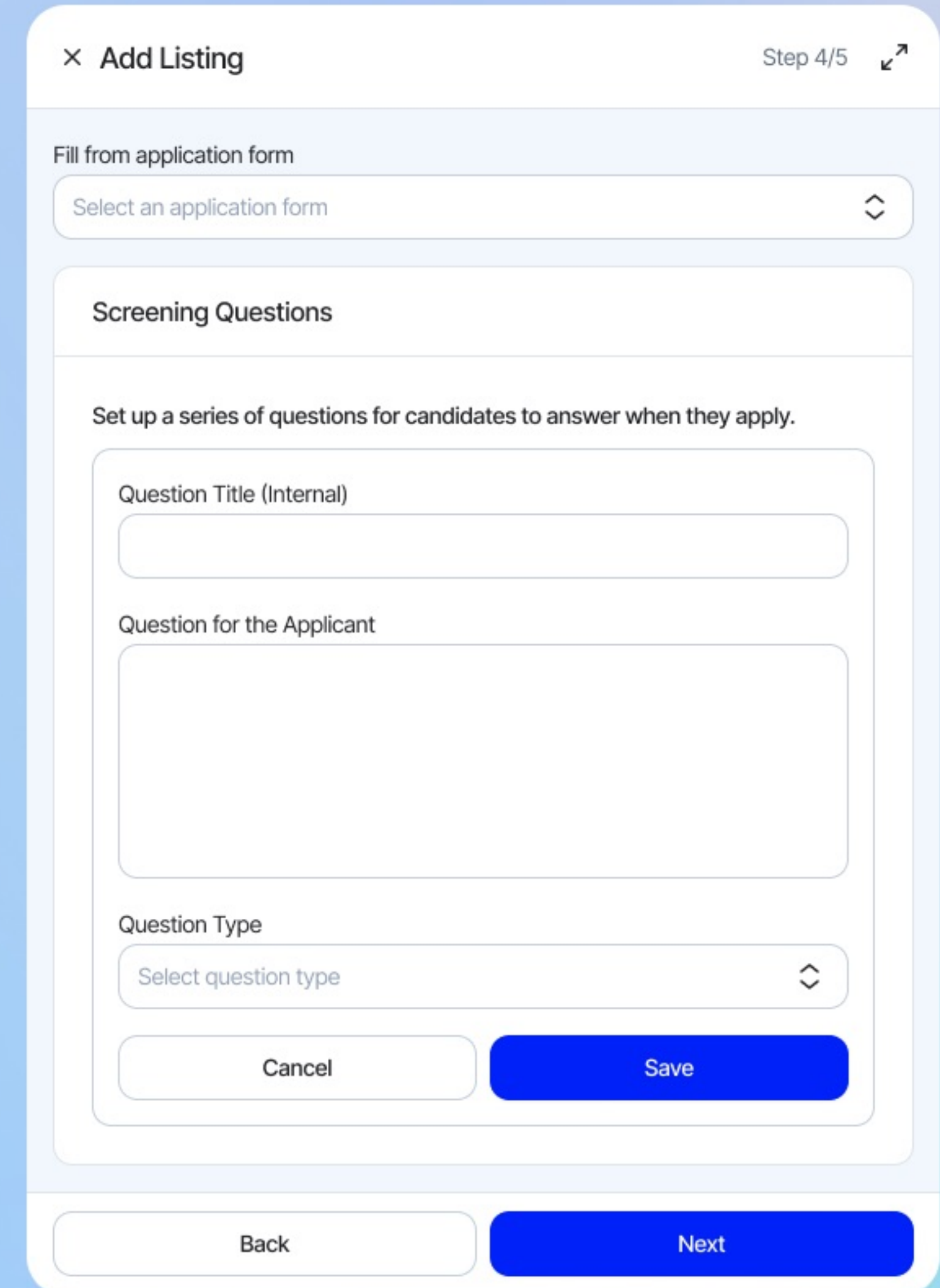
## STEP 4.2

# Add Screening Questions

- **Internal Question Name:** This is for your team's reference.
- **Question Text:** The application question that applicants will see.
- **Question Type & Preferred Answer:** Choose from options like Yes/No, Numerical, or Multiple Choice.
- **Auto-Rejection Flow:** Configure auto-rejection criteria based on applicant answers.

 **Note:** Auto-rejection and preferred answers are not available for free-response questions.

- **Rejection Message:** Set the message that will be sent to candidates who are auto-rejected.




The screenshot shows a mobile application interface for adding a listing. The title bar at the top says "Add Listing" with a close button on the left and "Step 4/5" with a share icon on the right. Below the title bar, there is a section "Fill from application form" with a dropdown menu labeled "Select an application form". The main section is titled "Screening Questions" and contains the instruction "Set up a series of questions for candidates to answer when they apply." Below this instruction are three input fields: "Question Title (Internal)", "Question for the Applicant", and "Question Type". The "Question Type" field is a dropdown menu labeled "Select question type". At the bottom of the form, there are two buttons: "Cancel" and "Save". At the very bottom of the screen, there are two more buttons: "Back" and "Next".

## STEP 4.3


# Preview & Save

- Before finalizing, [Preview Listing](#) to review how it will look to candidates.
- You can always edit the listing later if needed.





 Repeat this process if you want to add additional listings for your Job Requisition.

× Add Listing Step 5/5 ↗

### Listing Preview



**Marketing Associate**  
SCALIS Careers • Redmond, WA  
30 minutes ago

 Entirely Remote  Internship  Entry-Level  \$15 - \$25 / hr

#### About the job

Creative & Development Technology shapes the future of interactive entertainment by harnessing data and technology to empower the creation of the next generation of games. We are a collection of six teams, Frostbite, Data & Analytics, Creative Technologies, Technology Growth Strategy, Creative Direction, and Operations.

We enable the game team's technical product strategy through technology and solutions for game development. Our goal is to be the best place for engineers in EA while aiming to be valuable partners for game development. Our organization is aligned with expertise and specialization, providing ongoing solutions and technology and tools differentiation, we are nimble and ready to adapt and grow.

We are looking for an experienced and experienced UX Designer to join our team to support from the ground up, the strategy, user experience, and interface design on a new project within Infinite Worlds. You will work with teams to ensure that end users have a smooth and seamless experience.

[Back](#) [Add](#)



## STEP 5

# Configure Your Hiring Pipeline

## Add Pipeline

Pipeline templates help your hiring team maintain a consistent hiring process across job requisitions. Learn more about Pipeline Best Practices here.

- **Name Your Pipeline:** This is for internal reference only.
- **Select a Pipeline Template:** Choose an existing template or create a new one.
- **Add or Remove Interview Stages:** Customize stages within the Pre-screen and Interview(s) milestones.

### Pipeline Setup

[Link Pipeline Template](#)

Pipeline Name

This pipeline will be automatically saved as a template for future use.

#### Sourcing

Sourcing

Stage Visibility: Public

Stage Type: Generic Stage

#### Application Review

Application Review

Stage Visibility: Public

Stage Type: Generic Stage

Pre-Screen Add Stage +

Interviews Add Stage +

#### Offer

Offer

Stage Visibility: Public

Stage Type: Generic Stage

Add Stage +

## STEP 6

# Set Up Your Hiring Team

## Add Hiring Team

Organize your team and simplify collaboration from the very start of the hiring process.

- **Add Team Members:** Assign specific teams or individuals to job requisitions to streamline collaboration throughout hiring.
- **Primary Contact:** The primary contact is the first person a candidate should contact in case of any queries.

*Please note that if an individual who is already in a group on a job is added, their individual permission level must be equal to or higher than the permission level of the group they are in.*

### Hiring Team

Add Hiring Team Member or Group

Search by name, email, or group

### Primary Contact

Please select a primary contact from list above for this job. Candidates who pass the Application Review stage can contact this recruiter with any questions.

Search by name or email



## FINAL STEP

# Publish Your Job

1. Toggle the **Publish** icon to **On** for each listing you want to make active.
2. Click **Complete** to finalize.

Your job is now live and ready to attract candidates! Reach out to your customer success manager if you need any additional help or visit our [Knowledge Base](#) here.





### Publish Listings

Job Status

• Draft

**Important!**  
In order to publish your job listings and start accepting applications, ensure the Job Status is set to "Open" in the Job Details step. Otherwise, your listings will be saved but not published.

Choose which listings would like to publish.

 <b>Chicago Listing</b> On-Site • Chicago, IL	Preview  <input type="checkbox"/> Publish
 <b>Remote Listing</b> Entirely Remote • United States	Preview  <input type="checkbox"/> Publish



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	FarisBering	49%	in	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	Invite Declined 5d ago	Chemicals
<input type="checkbox"/>	Annette Black	☆ ☆ ☆ ☆ ☆	Back-End Engineer	Mertz Group	15%	—	Prospect 3w ago	Computer Software
<input type="checkbox"/>	Dianne Russell	★ ★ ★ ★ ★	UX Designer	Batz Group	53%	in	Prospect 3w ago	Internet
<input type="checkbox"/>	Kristin Watson	★ ★ ☆ ☆ ☆	Web Designer	Solenoid	83%	—	Invite Expired 1h ago	Information Techno
<input type="checkbox"/>	Brooklyn Simmons	☆ ☆ ☆ ☆ ☆	Design Lead	Performante	21%	—	Prospect 3d ago	Aviation

# Glossary

# SCALIS Glossary

## 1 Job Requisition

A formal request to create a new job opening, detailing position requirements, skills, and internal hiring needs.

## 2 Pipeline

A structured hiring workflow that guides candidates through various stages (e.g., application, interview) from initial interest to job offer.

## 3 Pipeline Template

A pre-set structure of interview stages and assessments that can be reused across different job requisitions for a consistent hiring process.

## 4 Pre Screen

An initial step in the hiring process where candidates are evaluated on basic qualifications before moving forward in the pipeline.

# SCALIS Glossary

## 5 Interview Stage

A specific phase within the hiring pipeline where candidates are interviewed or assessed. Stages can be customized to include multiple rounds or types of interviews.

## 6 Internal Stage

A part of the hiring pipeline that is visible only to the hiring team and not shown to the candidate.

## 7 Screening Questions

Questions included in a job application to help filter candidates based on essential qualifications. Screening questions can be configured with auto-rejection criteria.

## 8 Auto-Rejection Flow

An automated process that disqualifies applicants based on specific answers to screening questions, saving time in reviewing unqualified candidates.

# SCALIS Glossary

## 9 Job Listing

The external, candidate-facing version of a job description. A single job requisition can have multiple listings tailored to different candidate pools.

## 10 Listing Description

The job description visible to applicants, which can include key responsibilities, requirements, and role-specific information to attract talent.

## 11 Talent Database

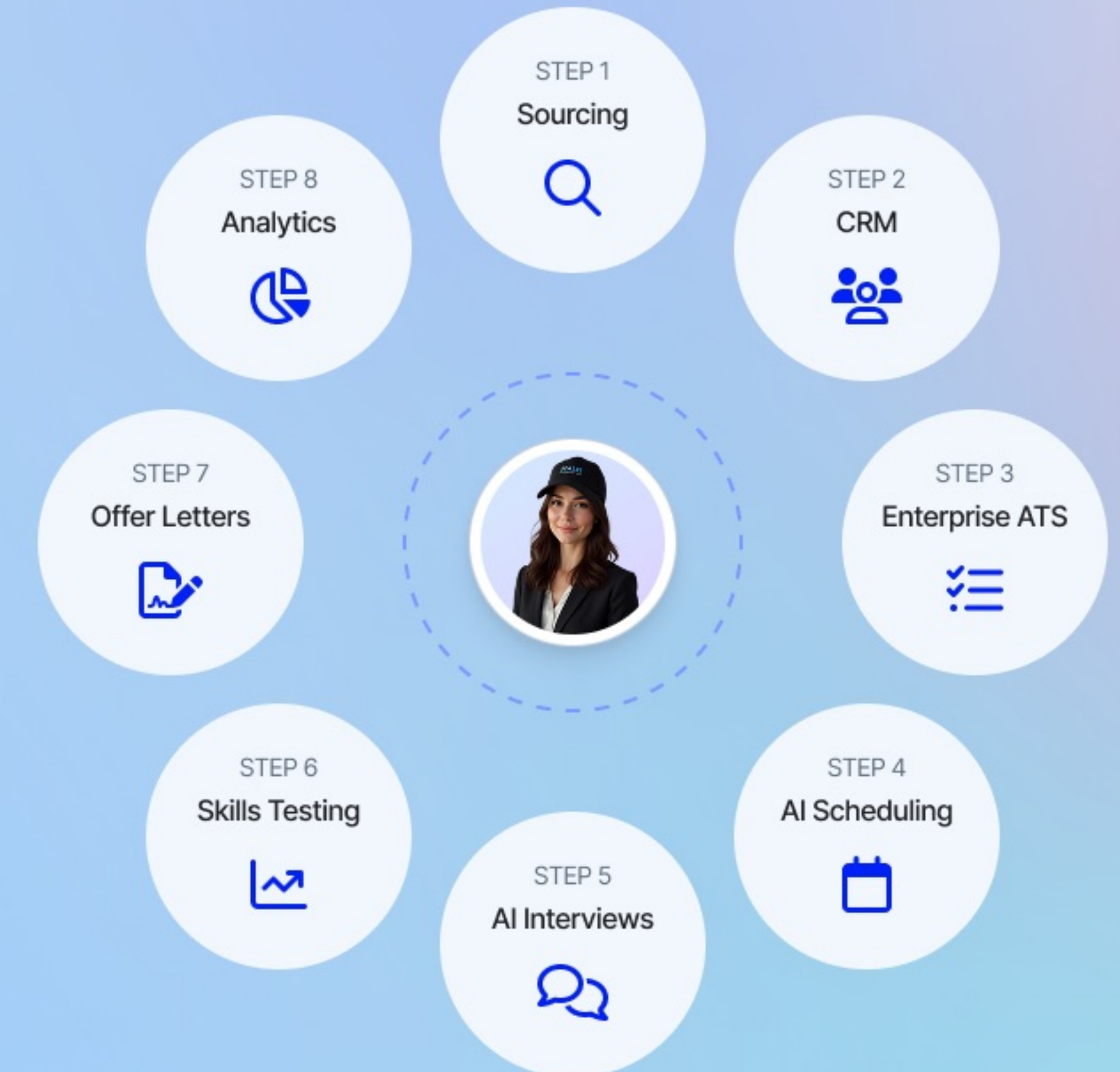
A database of candidates, including past applicants and potential future hires, that the hiring team can consider for open positions.

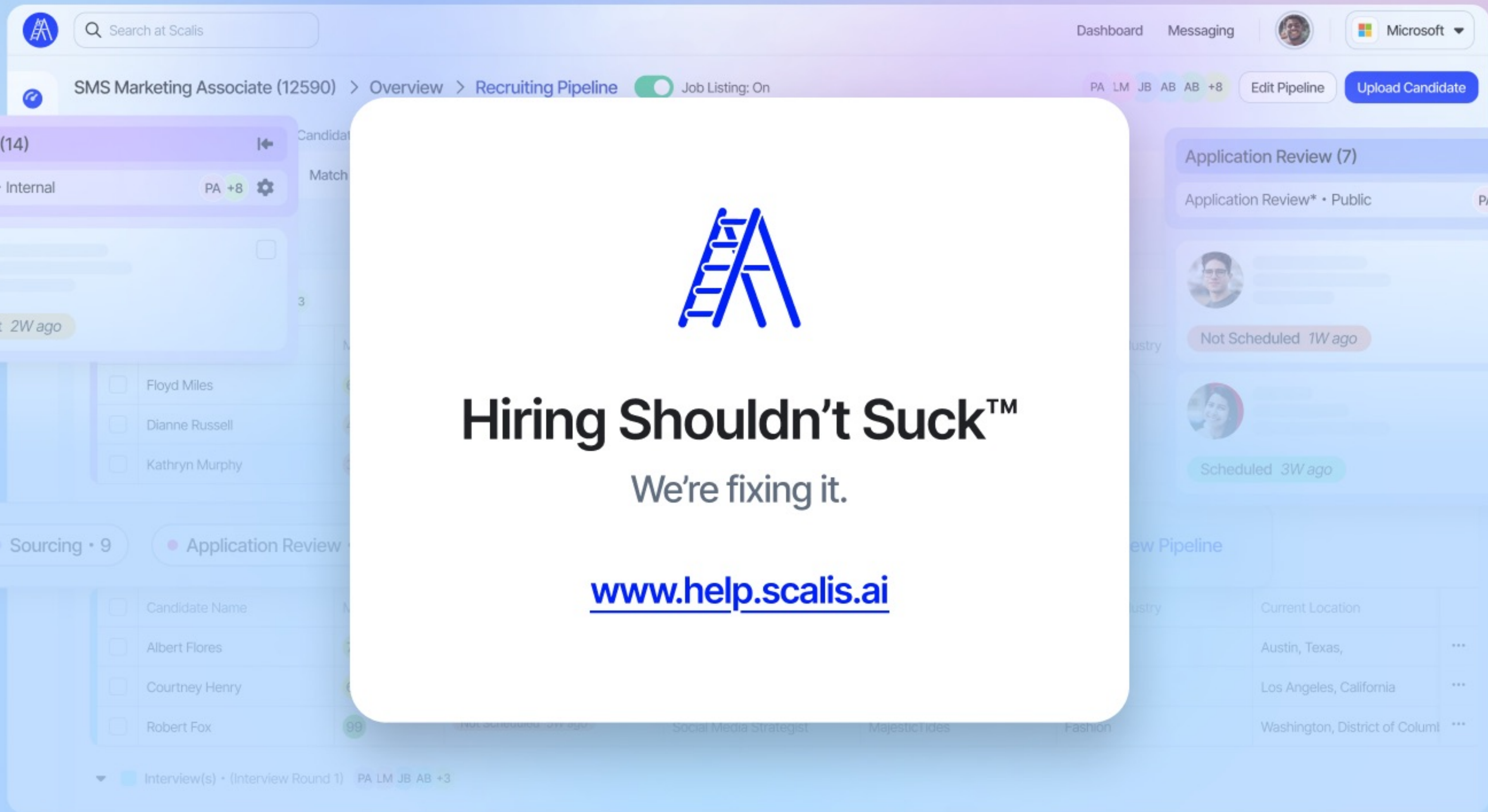
## ONBOARDING

# Questionnaire

We'd like to learn a bit more about you to make your onboarding experience as smooth and personalized as possible. Please let us know the following:

- Are you planning to migrate any existing candidates or other data over from your existing ATS system?
- Are you currently using LinkedIn Recruiter or LinkedIn Job Slots?
- What are the three core things you are looking to get out of the SCALIS system?





# Hiring Shouldn't Suck™

We're fixing it.

[www.help.scalis.ai](http://www.help.scalis.ai)