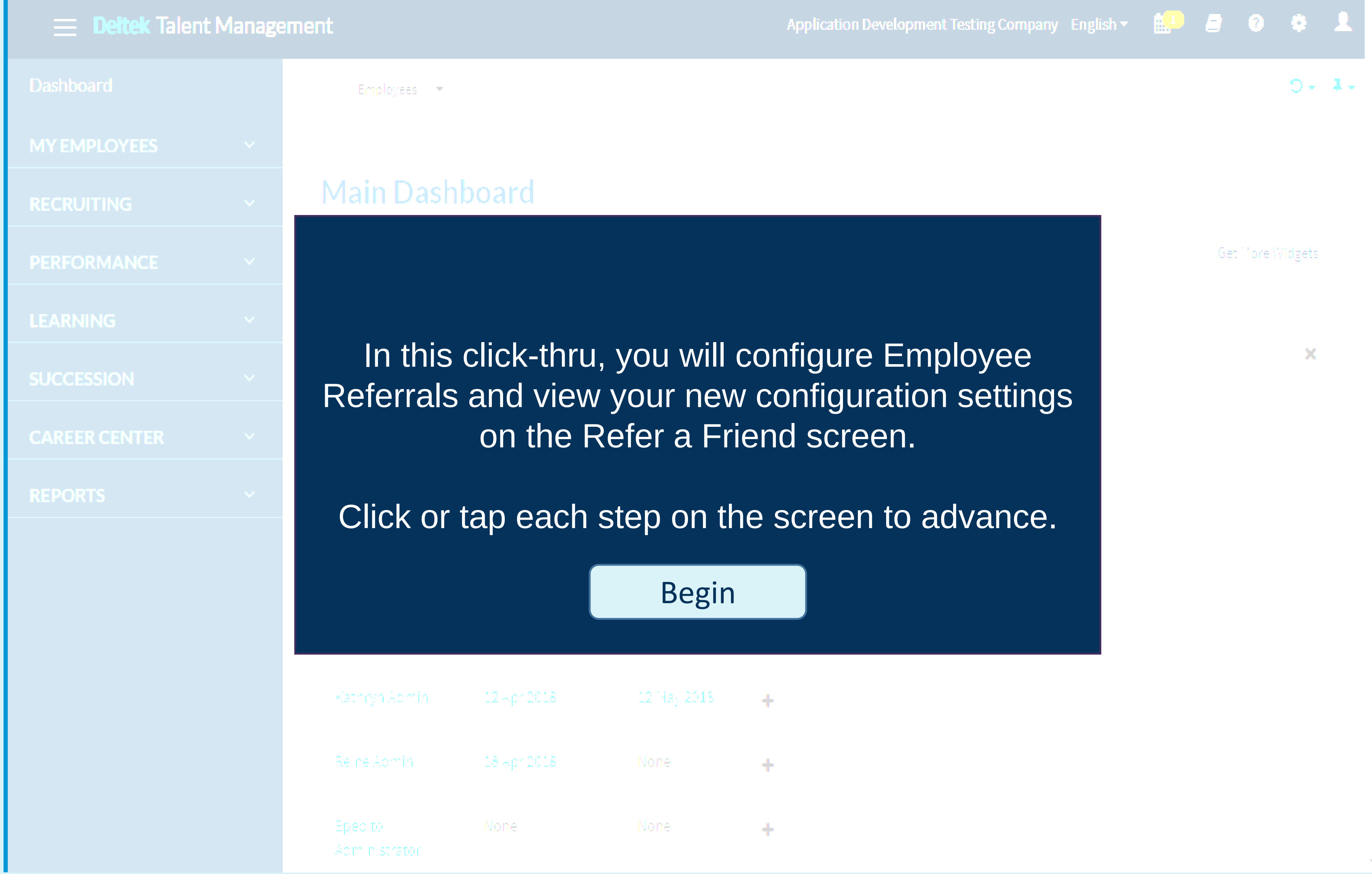
Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. Create National Identifier rules
5. Create Duplication rules and click Submit
6. View your settings on the Refer a Friend screen



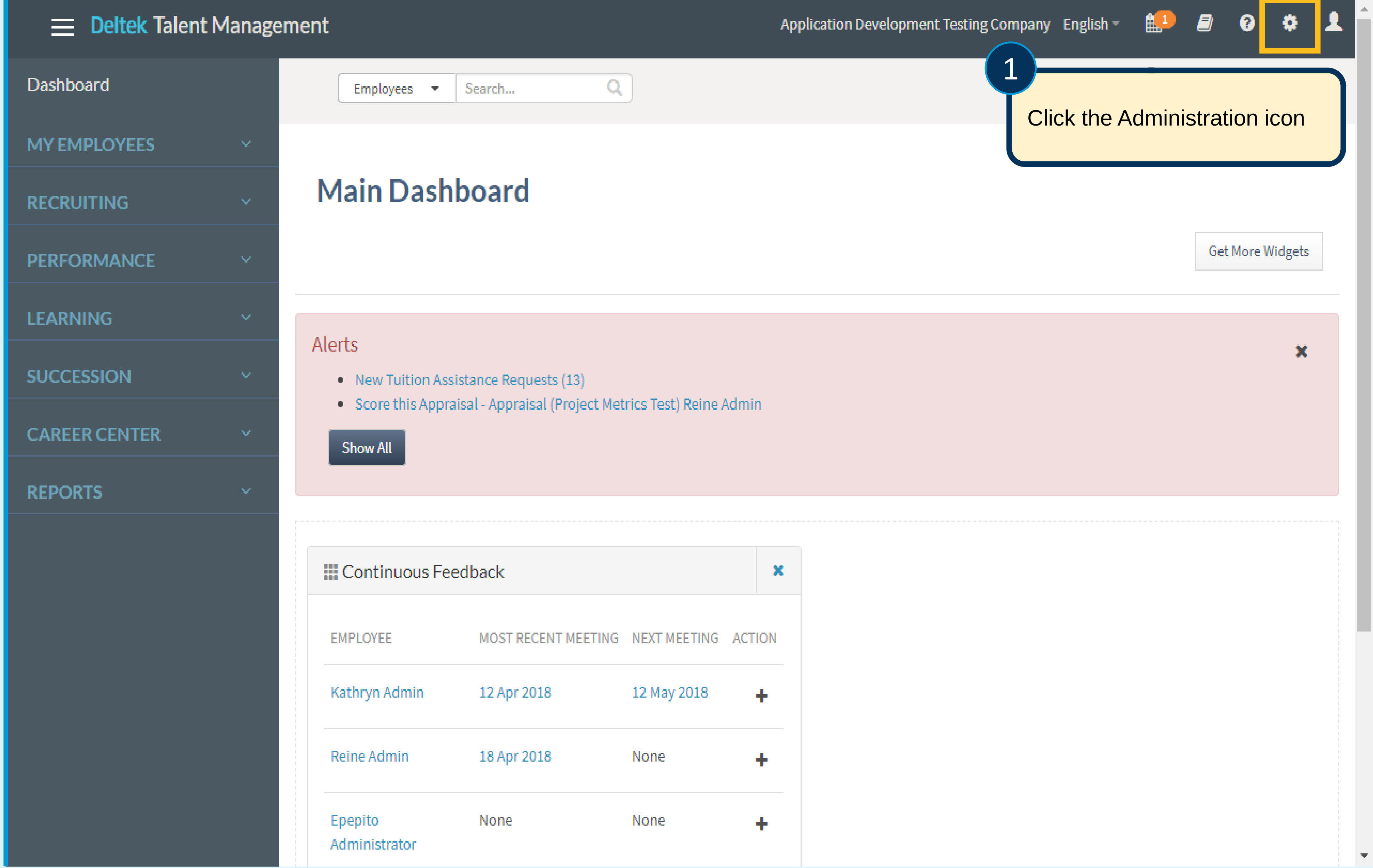
In this click-thru, you will configure Employee Referrals and view your new configuration settings on the Refer a Friend screen.

Click or tap each step on the screen to advance.

Begin

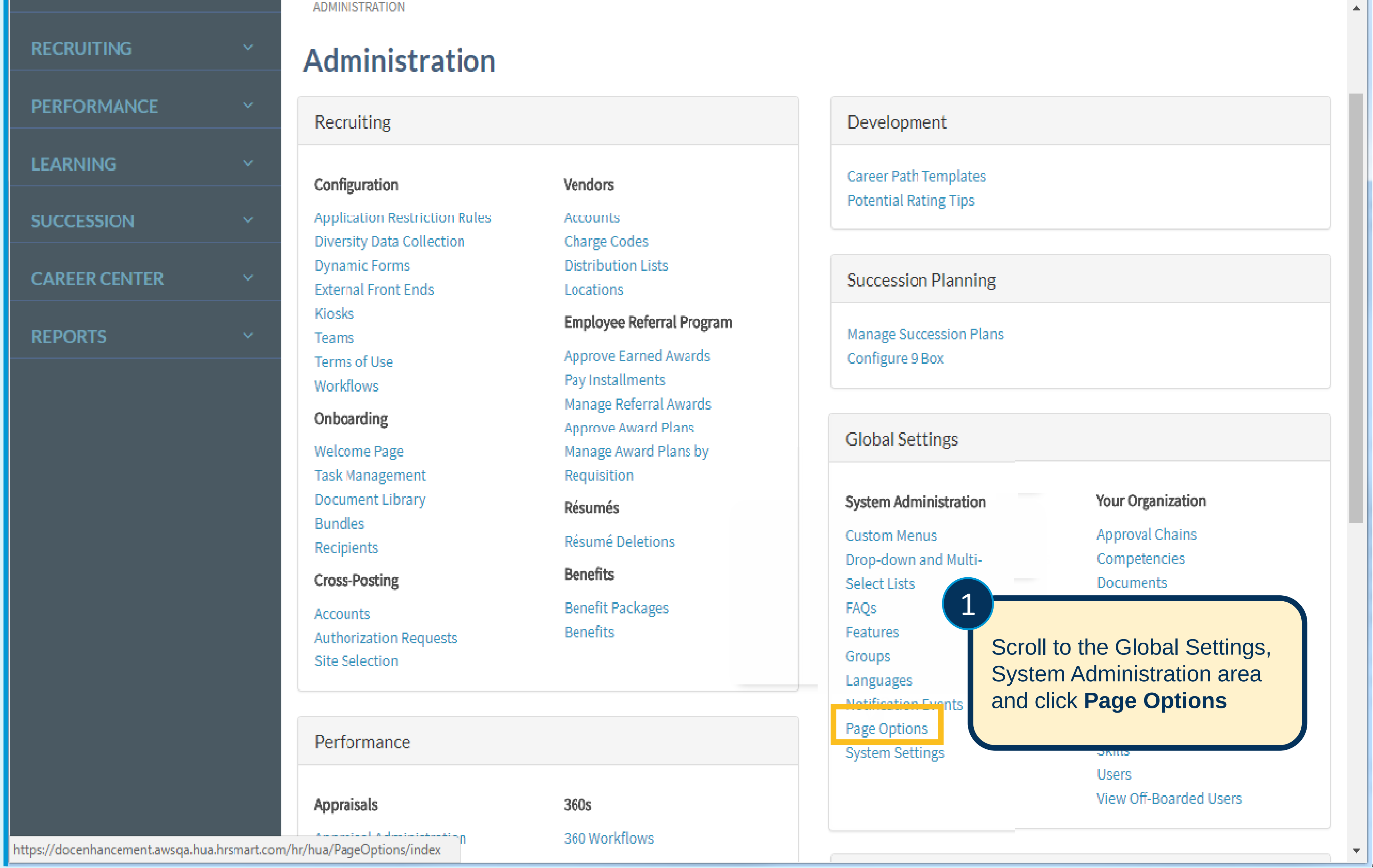
Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. Create National Identifier rules
5. Create Duplication rules and click Submit
6. View your settings on the Refer a Friend screen



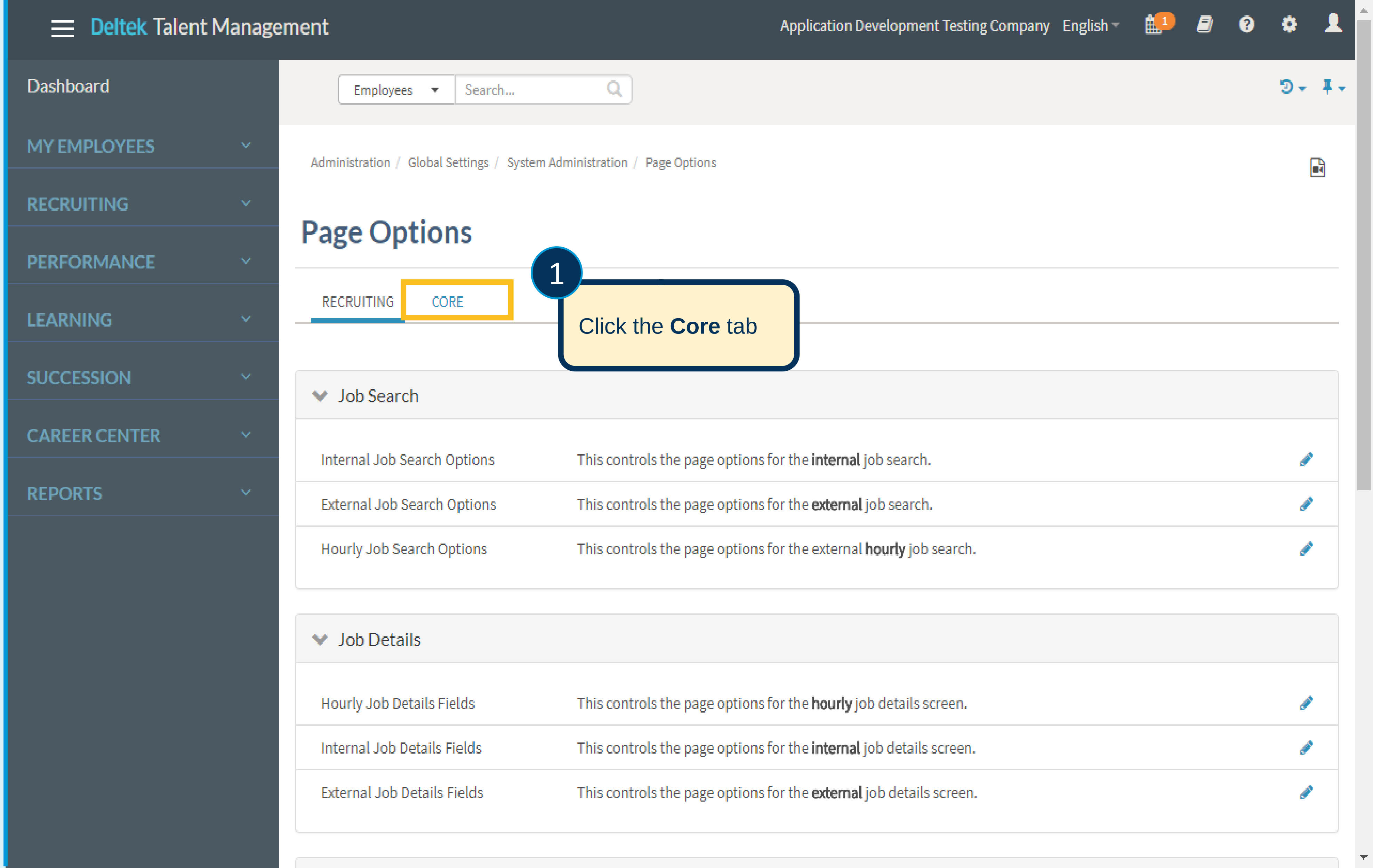
Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. Create National Identifier rules
5. Create Duplication rules and click Submit
6. View your settings on the Refer a Friend screen



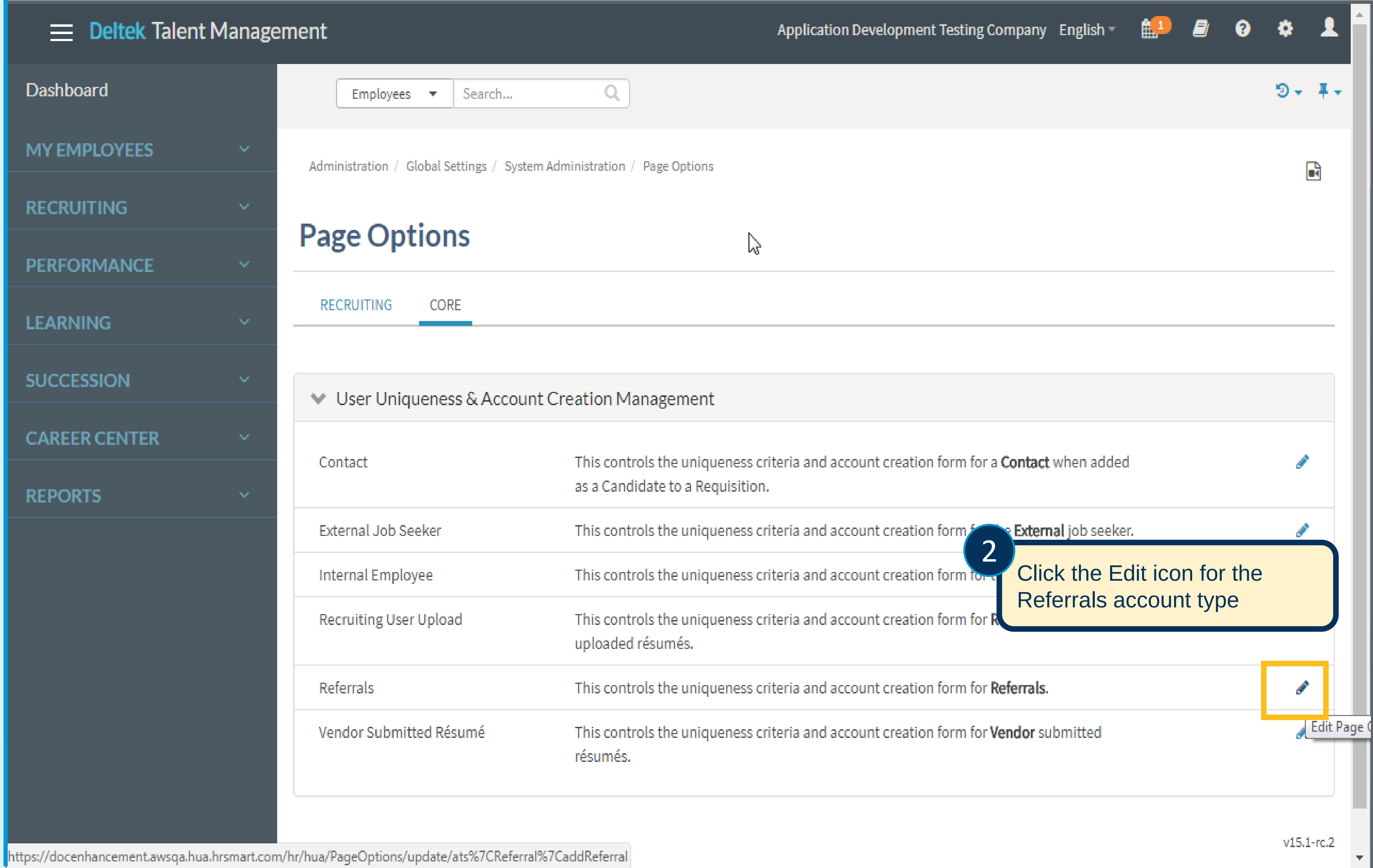
Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. Create National Identifier rules
5. Create Duplication rules and click Submit
6. View your settings on the Refer a Friend screen



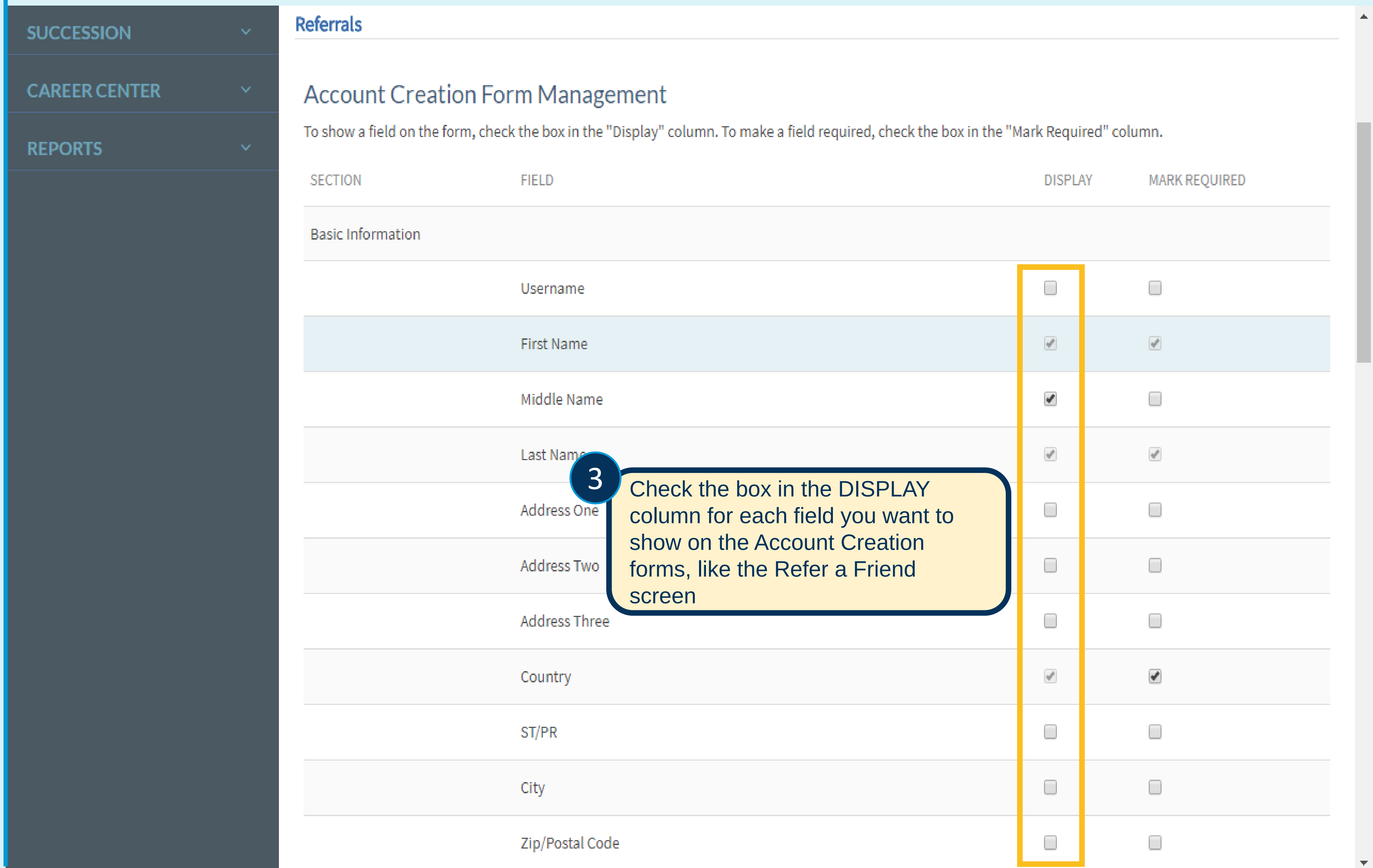
Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. Create National Identifier rules
5. Create Duplication rules and click Submit
6. View your settings on the Refer a Friend screen



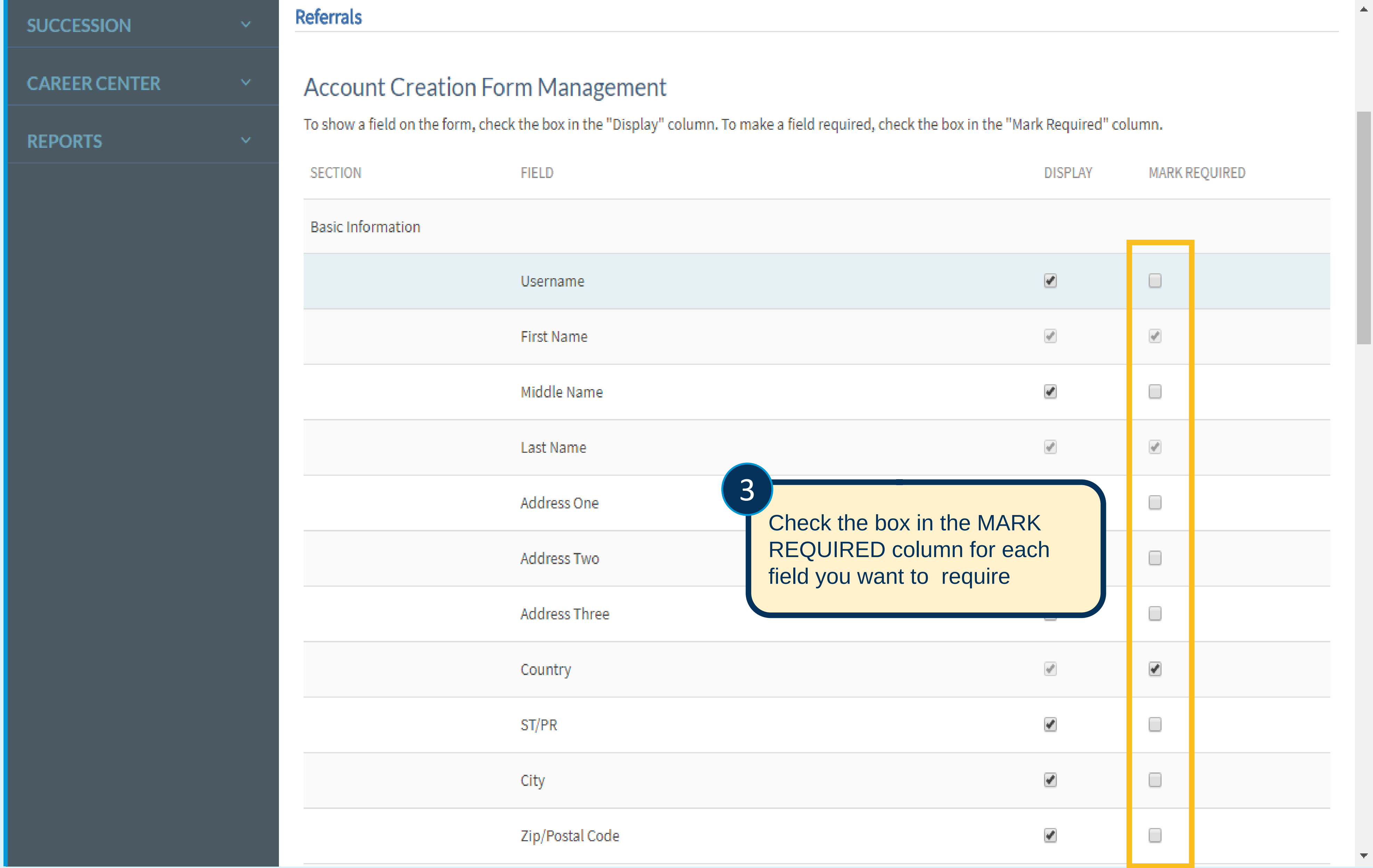
Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. **Select the Account Creation Form Management fields**
4. Create National Identifier rules
5. Create Duplication rules and click Submit
6. View your settings on the Refer a Friend screen



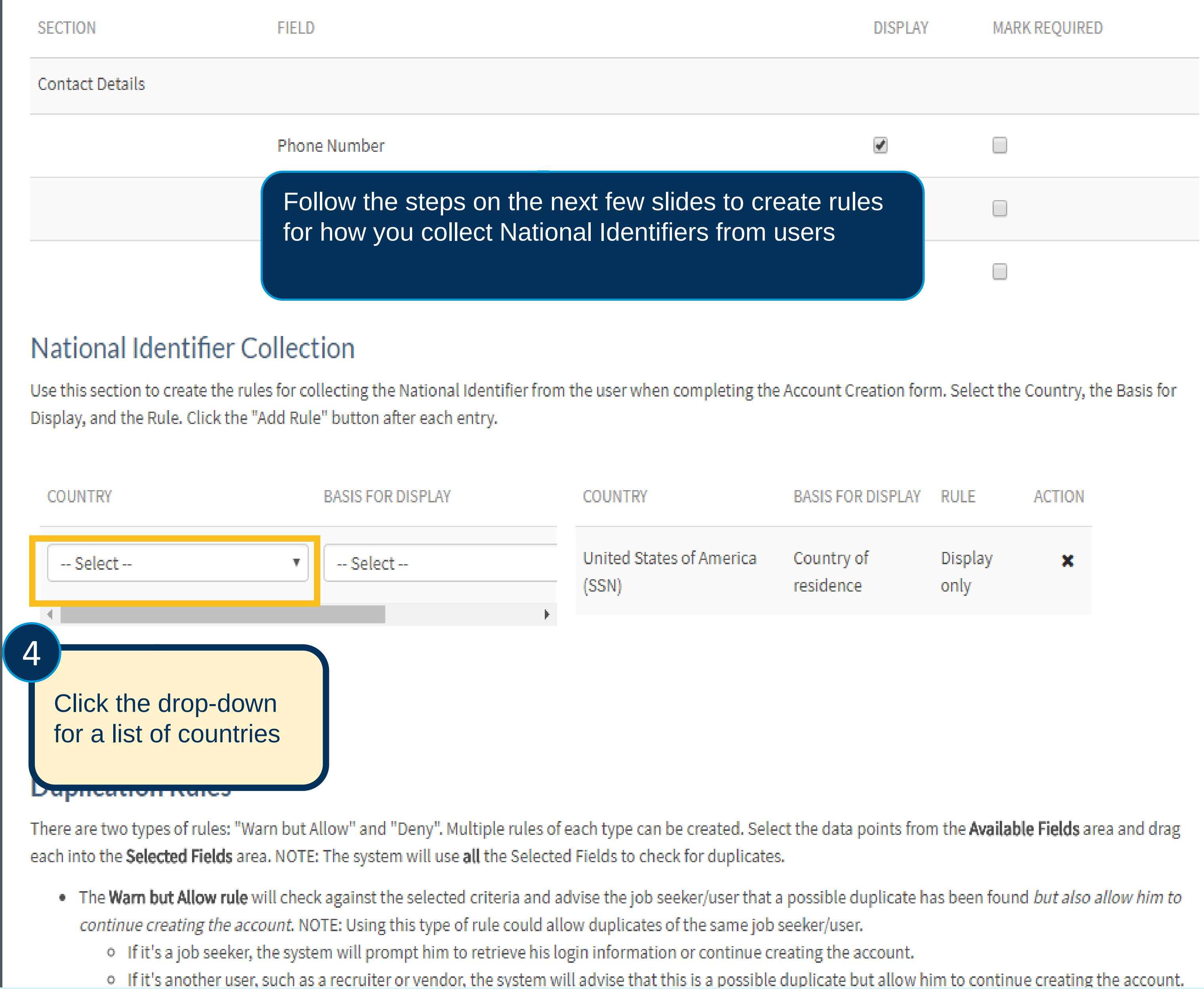
Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. **Select the Account Creation Form Management fields**
4. Create National Identifier rules
5. Create Duplication rules and click Submit
6. View your settings on the Refer a Friend screen



Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. **Create rules for collecting National Identifier**
5. Create Duplication Rules and click Submit
6. View your settings on the Refer a Friend screen



Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. **Create rules for collecting National Identifier**
5. Create Duplication Rules and click Submit
6. View your settings on the Refer a Friend screen

SECTION	FIELD	DISPLAY	MARK REQUIRED
	Phone Number	☐	☐
	Preferred Method of Electronic Communication	☐	☐
	Mobile Phone Number	☑	☐

National Identifier Collection

Use this section to create the rules for collecting the National Identifier from the user when completing the Account Creation form. Select the Country, the Basis for Display, and the Rule. Click the "Add Rule" button after each entry.

COUNTRY	BASIS FOR DISPLAY
-- Select --	-- Select --

COUNTRY dropdown options:
- -- Select --
- Brazil (CPF)
- Canada (SIN)
- France (NIR)
- India (PAN)
- Italy (CF)
- South Africa (ID Number)
- United Kingdom (NINO)
- United States of America (SSN)

COUNTRY	BASIS FOR DISPLAY	RULE	ACTION
United States of America (SSN)	Country of residence	Display only	✖

4 Select the country to associate with the rule

D

There are two types of rules: "Warn but Allow" and "Deny". Multiple rules of each type can be created. Select the data points from the **Available Fields** area and drag each into the **Selected Fields** area. NOTE: The system will use **all** the Selected Fields to check for duplicates.

- The **Warn but Allow rule** will check against the selected criteria and advise the job seeker/user that a possible duplicate has been found *but also allow him to continue creating the account.* NOTE: Using this type of rule could allow duplicates of the same job seeker/user.
  - If it's a job seeker, the system will prompt him to retrieve his login information or continue creating the account.
  - If it's another user, such as a recruiter or vendor, the system will advise that this is a possible duplicate but allow him to continue creating the account.
- The **Deny rule** will check against the selected criteria and display an error message to the job seeker/user that a duplicate has been found.
  - If it's a job seeker, the system will prompt him to retrieve his login so that he can access the account he previously created.

Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. **Create rules for collecting National Identifier**
5. Create Duplication Rules and click Submit
6. View your settings on the Refer a Friend screen

SECTION	FIELD	DISPLAY	MARK REQUIRED
	Phone Number		
	Preferred Method of Ele		
	Mobile Phone Number		

National Identifier Collection

Use this section to create the rules for collecting the Nation ... for Display, and the Rule. Click the "Add Rule" button after eac

ITRY	BASIS FOR DISPLAY
zil (CPF)	-- Select --

-- Select --
Always
Country of residence
Requisition primary location
Either residence or req. location

Add Rule

United States of America (SSN)	Country of residence	Display only	✖

4

Select the Basis for Display:

- **Always**
- **Country of residence –** National identity asked only if the applicant resides in the selected country
- **Requisition primary location –** National identity asked only if the primary location of the requisition is in the selected country
- **Either residence or req. location** – National identity asked if either of the above are true

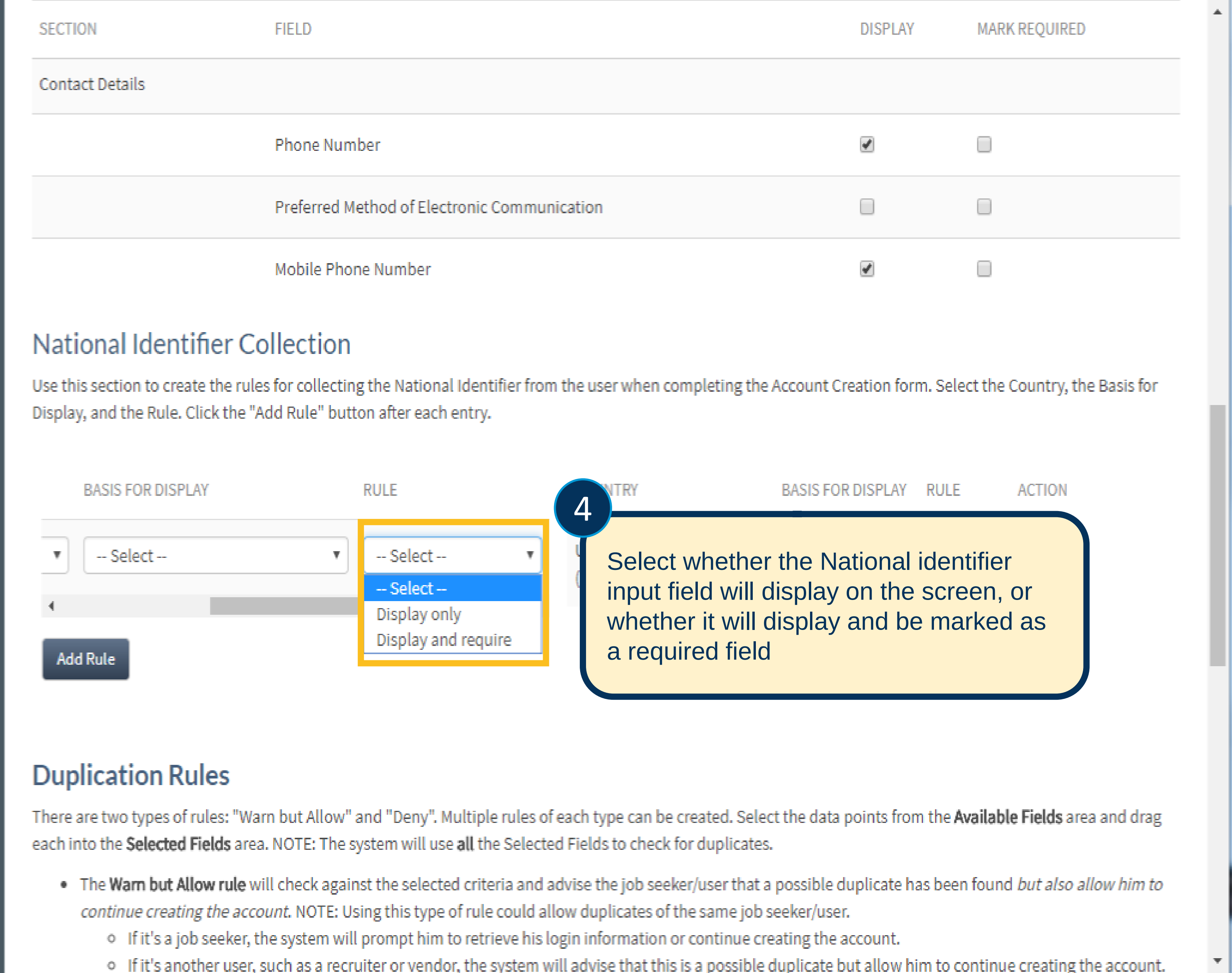
Duplication Rules

There are two types of rules: "Warn but Allow" and "Deny". Multiple rules of each type can be created. Select the data points from the **Available Fields** area and drag each into the **Selected Fields** area. NOTE: The system will use **all** the Selected Fields to check for duplicates.

- The **Warn but Allow rule** will check against the selected criteria and advise the job seeker/user that a possible duplicate has been found *but also allow him to continue creating the account.* NOTE: Using this type of rule could allow duplicates of the same job seeker/user.
  - If it's a job seeker, the system will prompt him to retrieve his login information or continue creating the account.
  - If it's another user, such as a recruiter or vendor, the system will advise that this is a possible duplicate but allow him to continue creating the account.
- The **Deny rule** will check against the selected criteria and display an error message to the job seeker/user that a duplicate has been found.

Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. **Create rules for collecting National Identifier**
5. Create Duplication Rules and click Submit
6. View your settings on the Refer a Friend screen



Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. **Create rules for collecting National Identifier**
5. Create Duplication Rules and click Submit
6. View your settings on the Refer a Friend screen

SECTION	FIELD	DISPLAY	MARK REQUIRED
Contact Details			
	Phone Number	☐	☐
	Preferred Method of Electronic Communication	☐	☐
	Mobile Phone Number	☑	☐

National Identifier Collection

Use this section to create the rules for collecting the National Identifier from the user when completing the Account Creation form. Select the Country, the Basis for Display, and the Rule. Click the "Add Rule" button after each entry.

BASIS FOR DISPLAY	RULE
Always	Display only

COUNTRY	BASIS FOR DISPLAY	RULE	ACTION
United States of America (SSN)	Country of residence	Display only	✖

Add Rule

4 Click **Add Rule**

Duplication Rules

There are two types of rules: "Warn but Allow" and "Deny". Multiple rules of each type can be created. Select the data points from the **Available Fields** area and drag each into the **Selected Fields** area. NOTE: The system will use **all** the Selected Fields to check for duplicates.

- The **Warn but Allow rule** will check against the selected criteria and advise the job seeker/user that a possible duplicate has been found *but also allow him to continue creating the account.* NOTE: Using this type of rule could allow duplicates of the same job seeker/user.
  - If it's a job seeker, the system will prompt him to retrieve his login information or continue creating the account.
  - If it's another user, such as a recruiter or vendor, the system will advise that this is a possible duplicate but allow him to continue creating the account.

Configure Employee Referrals

1 Access the Core tab of Page Options

2 Click the Referrals Edit icon

3 Select Account Creation Form Management fields

4 Create rules for collecting National Identifier

5 Create Duplication Rules and click Submit

6 View your settings on the Refer a Friend screen

SECTION	FIELD	DISPLAY	MARK REQUIRED
Contact Details			
	Phone Number	☐	☐
	Preferred Method of Electronic Communication	☐	☐
	Mobile Phone Number	☑	☐

National Identifier Collection

Use this section to create the rules for collecting the National Ident
Display, and the Rule. Click the "Add Rule" button after each entry.

The new rule is added to the grid on the right. To remove a rule, click the Delete icon in the Action column

BASIS FOR DISPLAY	RULE
Always	Display only

Add Rule

COUNTRY	BASIS FOR DISPLAY	RULE	ACTION
United States of America (SSN)	Country of residence	Display only	✖
Brazil (CPF)	Always	Display only	✖

Duplication Rules

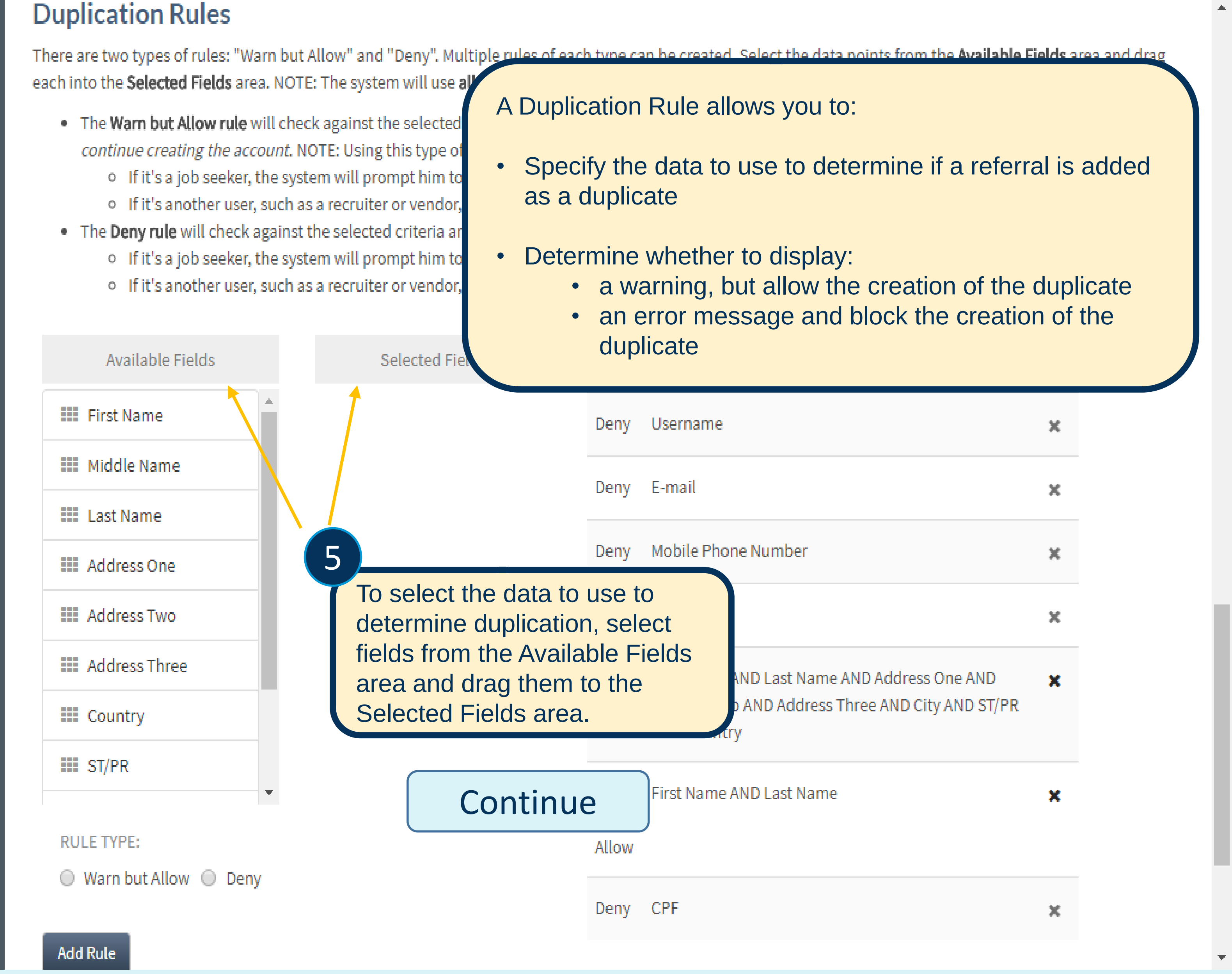
There are two types of rules: "Warn but Allow" and "Deny". Multiple rules of each type can be created. Select the data points from the **Available Fields** area and drag each into the **Selected Fields** area. NOTE: The system will use **all** the Selected Fields to check for du

- The **Warn but Allow rule** will check against the selected criteria and advise the job seeker/user th ... *to continue creating the account.* NOTE: Using this type of rule could allow duplicates of the same
  - If it's a job seeker, the system will prompt him to retrieve his login information or continu
  - If it's another user, such as a recruiter or vendor, the system will advise that this is a possi ... nt.

4 Click the arrow to scroll down to the Duplication Rules section

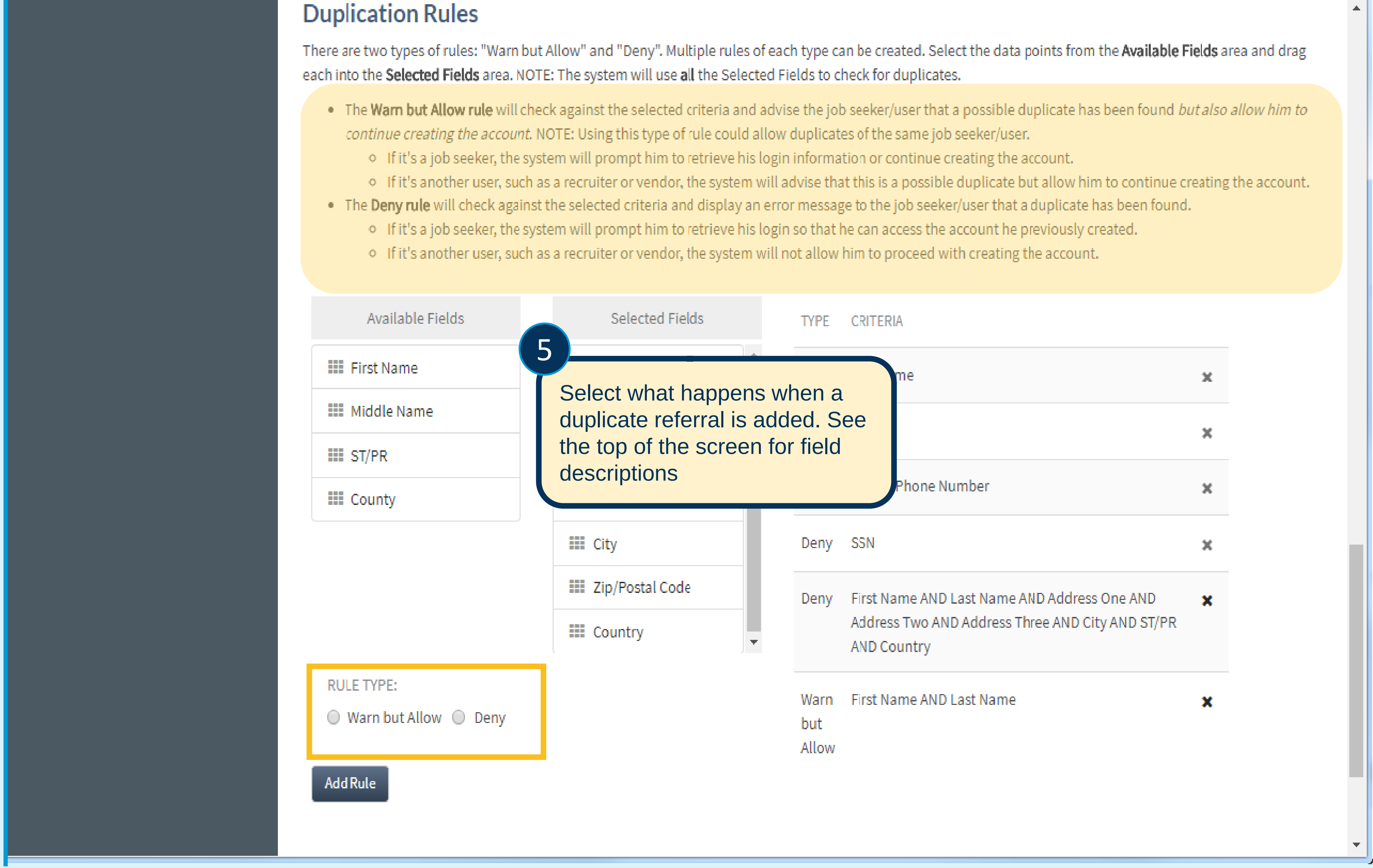
Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. Create rules for collecting National Identifier
5. Create Duplication Rules and click **Submit**
6. View your settings on the Refer a Friend screen



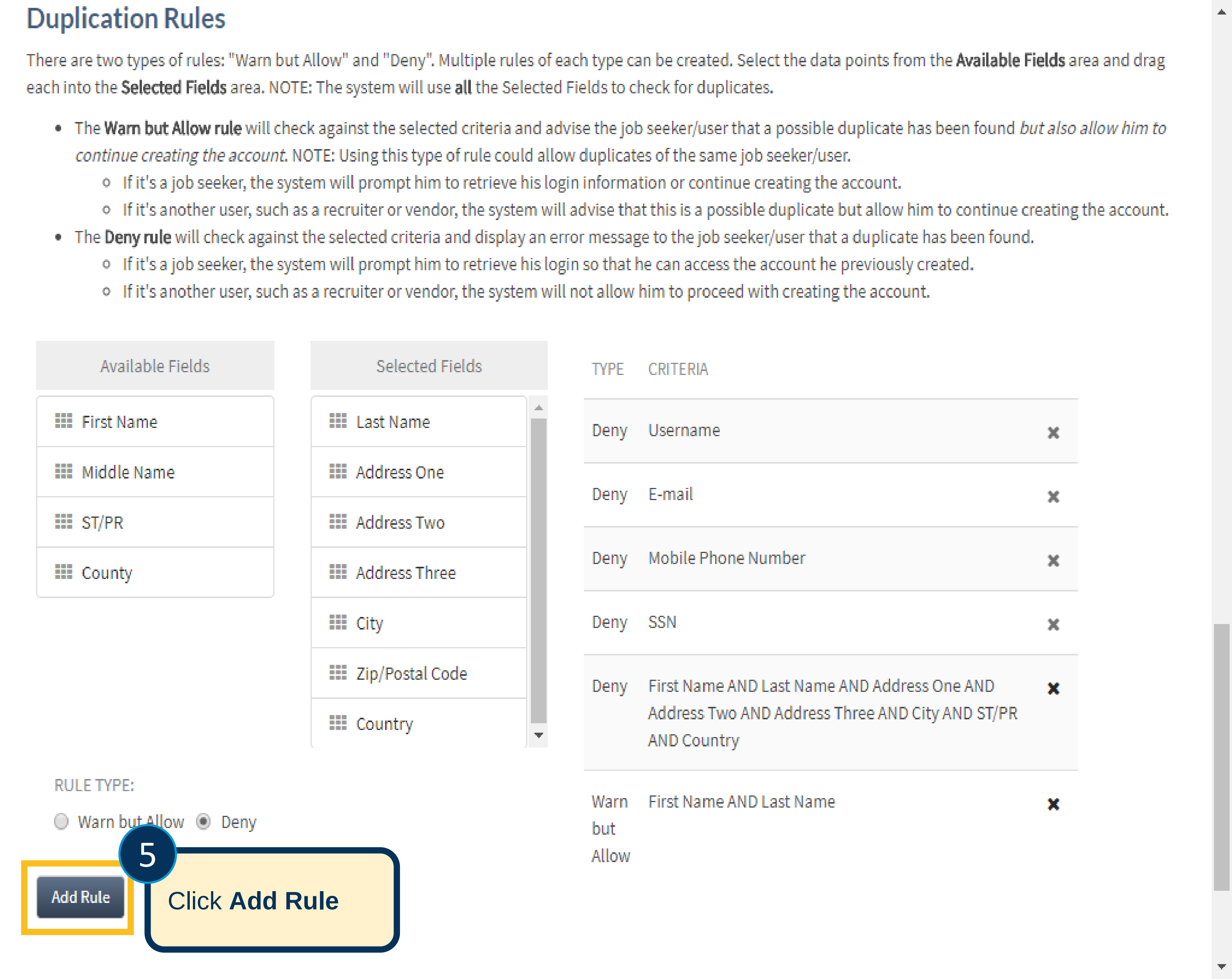
Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. Create rules for collecting National Identifier
5. Create Duplication Rules and click **Submit**
6. View your settings on the Refer a Friend screen



Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. Create rules for collecting National Identifier
5. Create Duplication Rules and click **Submit**
6. View your settings on the Refer a Friend screen



Configure Employee Referrals

1 Access the Core tab of Page Options

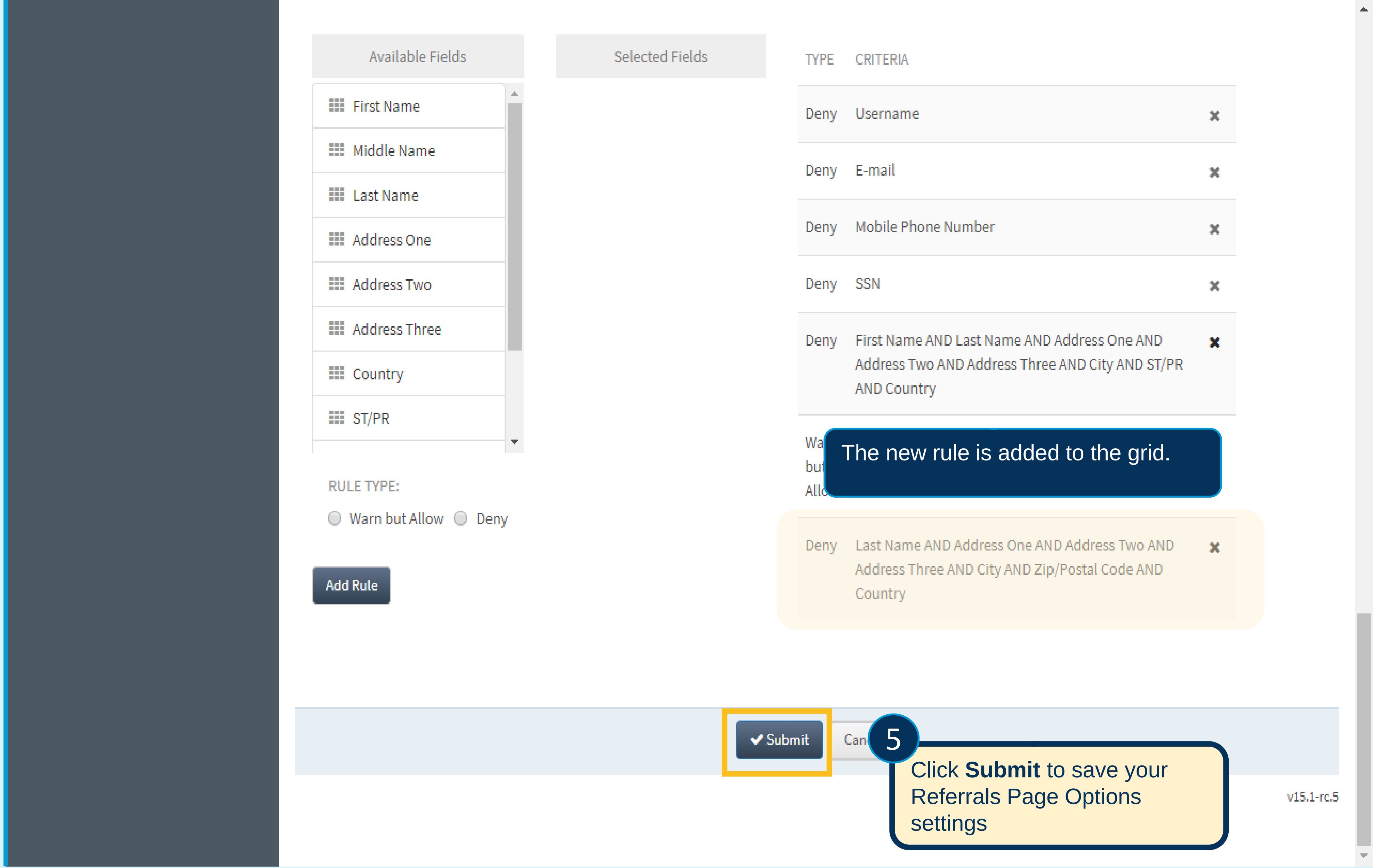
2 Click the Referrals Edit icon

3 Select Account Creation Form Management fields

4 Create rules for collecting National Identifier

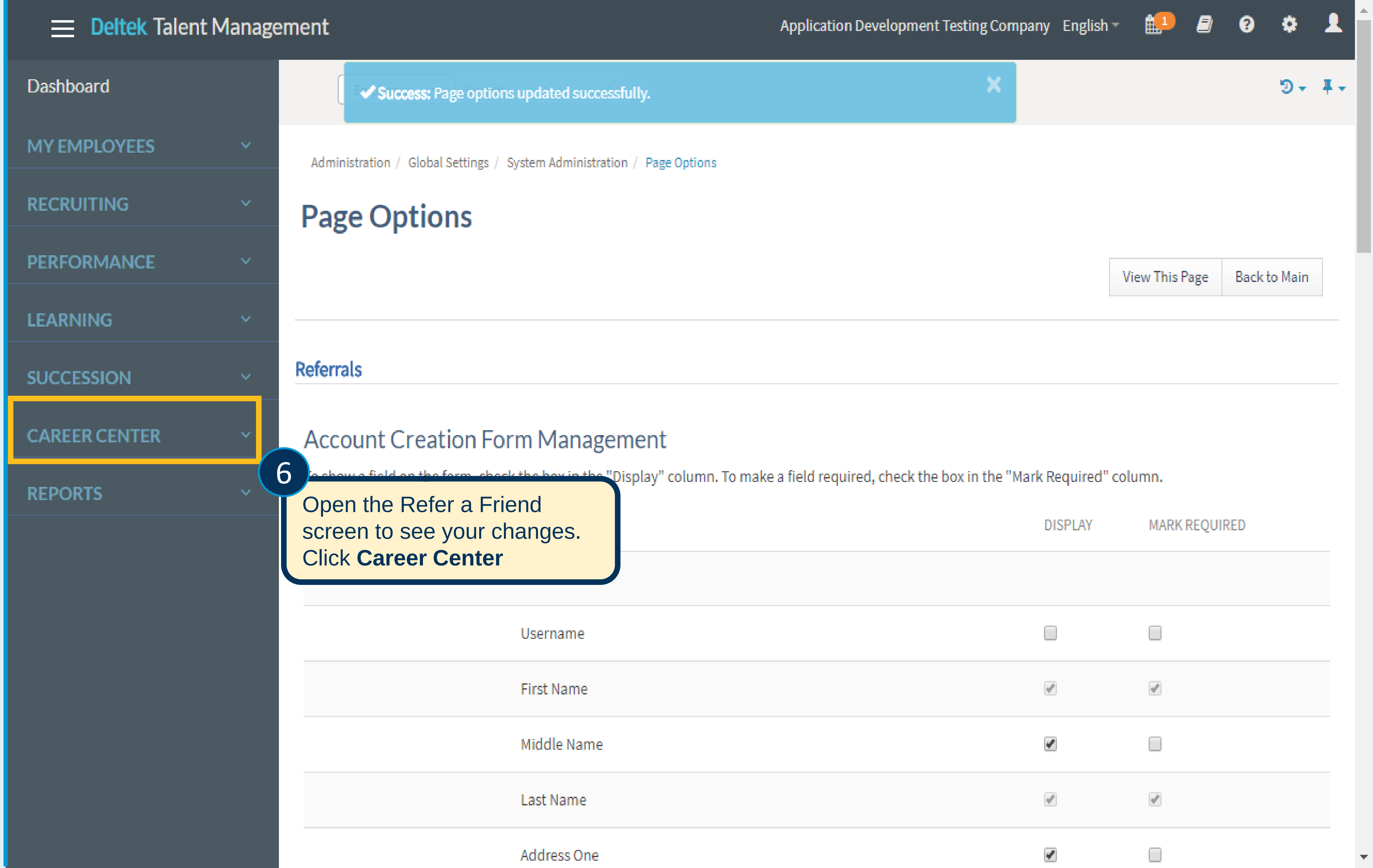
5 Create Duplication Rules and click **Submit**

6 View your settings on the Refer a Friend screen



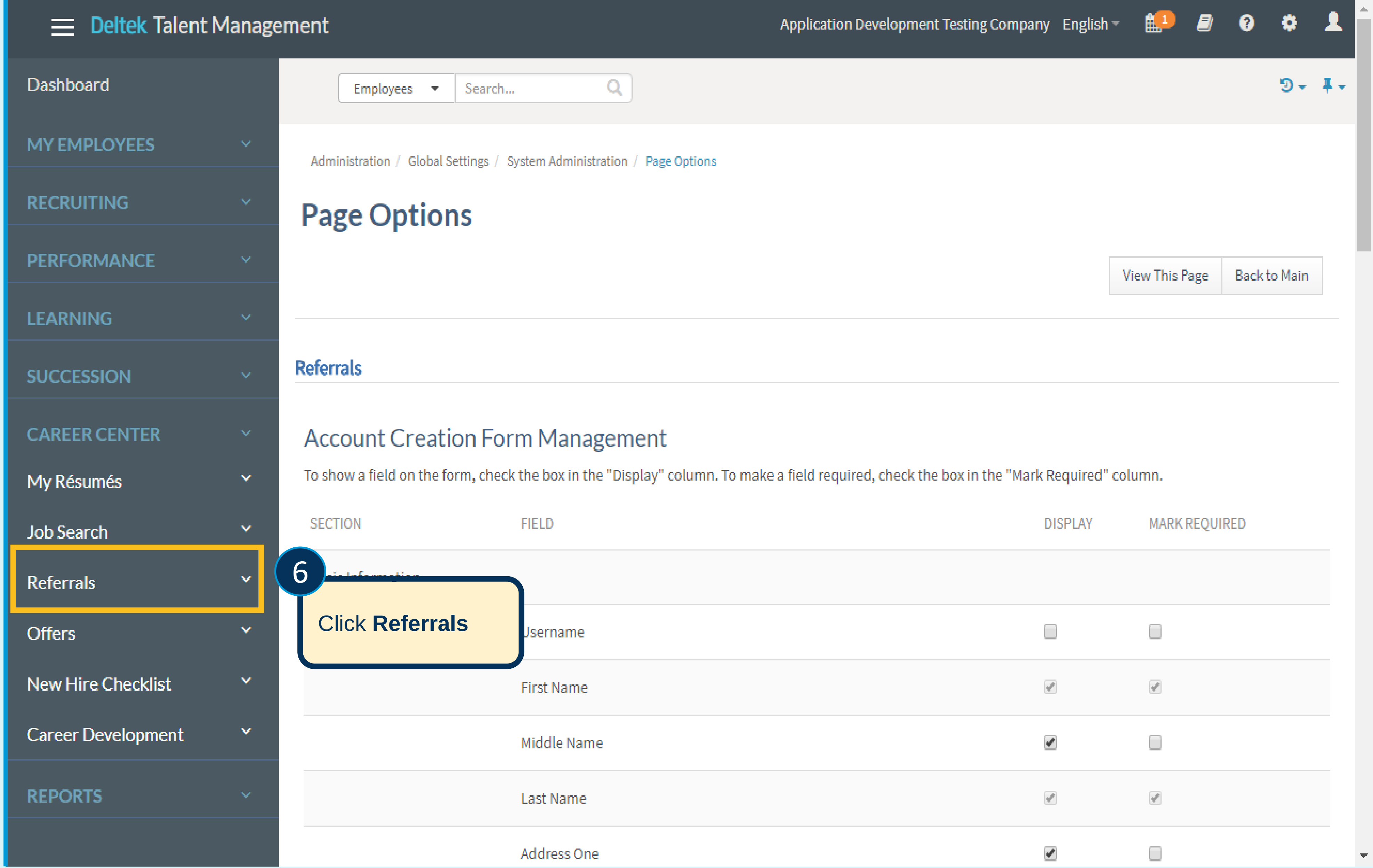
Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. Create rules for collecting National Identifier
5. Create Duplication Rules and click Submit
6. View your settings on the Refer a Friend screen



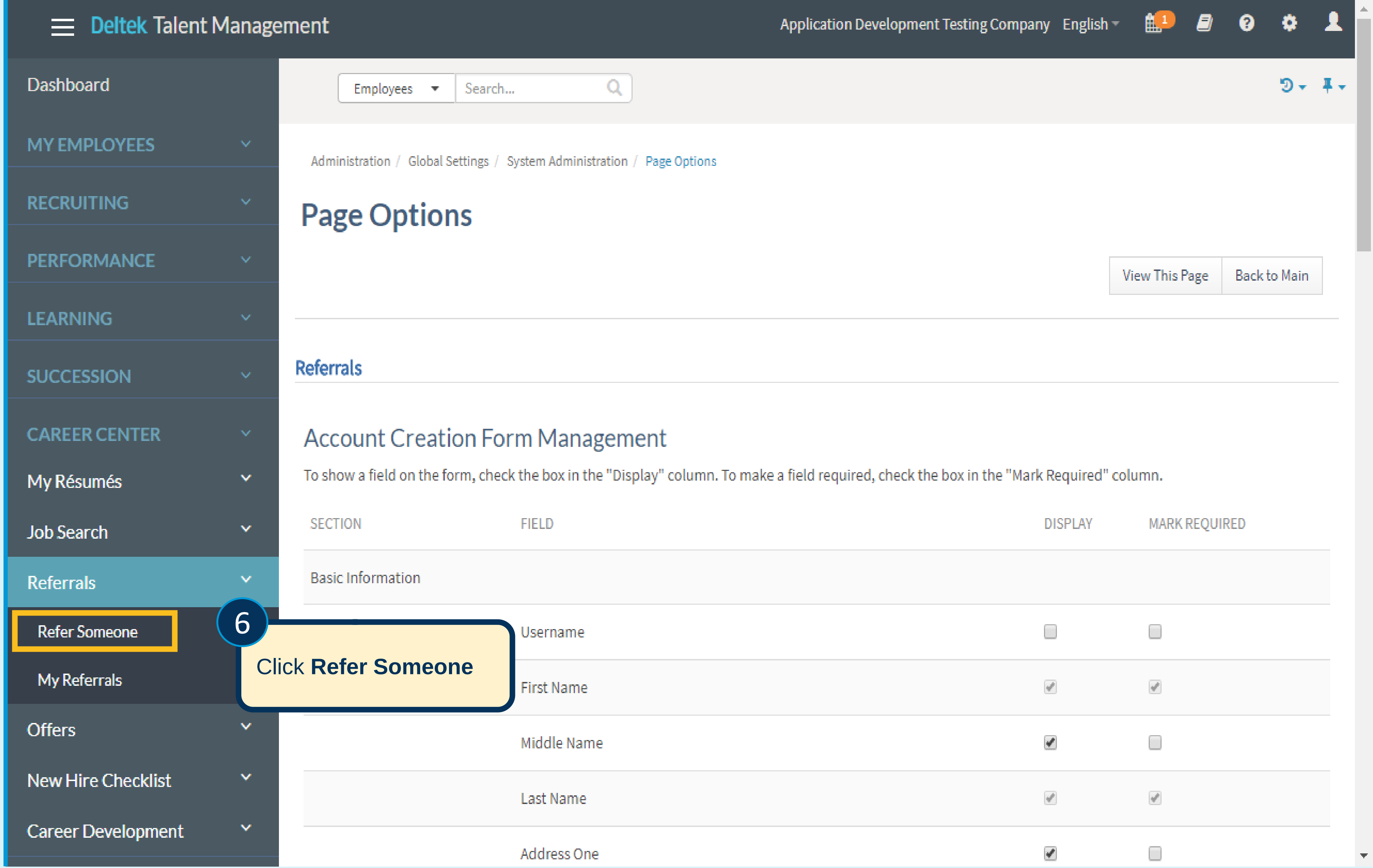
Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. Create rules for collecting National Identifier
5. Create Duplication Rules and click Submit
6. **View your settings on the Refer a Friend screen**



Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. Create rules for collecting National Identifier
5. Create Duplication Rules and click Submit
6. View your settings on the Refer a Friend screen



Configure Employee Referrals

1 Access the Core tab of Page Options

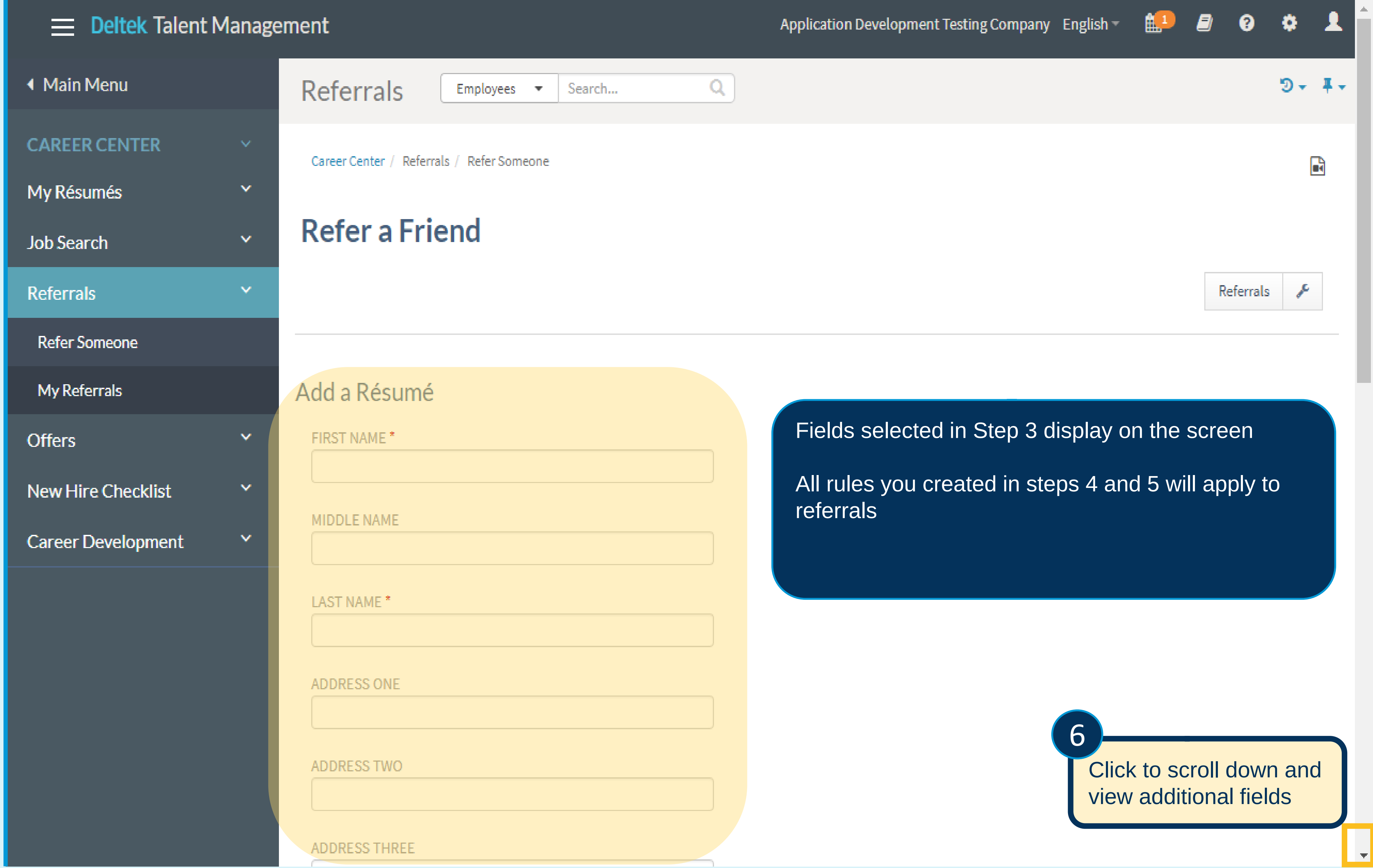
2 Click the Referrals Edit icon

3 Select Account Creation Form Management fields

4 Create rules for collecting National Identifier

5 Create Duplication Rules and click Submit

6 View your settings on the Refer a Friend screen



Fields selected in Step 3 display on the screen

All rules you created in steps 4 and 5 will apply to referrals

6 Click to scroll down and view additional fields

Configure Employee Referrals

1. Access the Core tab of Page Options
2. Click the Referrals Edit icon
3. Select Account Creation Form Management fields
4. Create rules for collecting National Identifier
5. Create Duplication Rules and click Submit
6. **View your settings on the Refer a Friend screen**

ADDRESS THREE

COUNTRY *

United States of America

ST/PR

-- Select --

CITY

ZIP/POSTAL CODE

COUNTY

SSN

This is an encrypted field.

MOBILE PHONE NUMBER

US (+1)

E-MAIL *

CONFIRM E-MAIL *

This concludes the
Configure an Employee Referral click-thru