Overview Video

https://www.youtube.com/embed/Sg5sLH64y-c

Step-by-Step Tutorial Guide

Step 1: Open the ATS Module

1. Log in to the TankhaPay Business Portal.
2. From the left-side navigation menu, click on **ATS (Applicant Tracking System)**.
3. Navigate to the **Candidates** or **Recruitment Pipeline** section.

The ATS dashboard displays all candidates currently in the hiring process.

Step 2: Select the Candidate

1. Locate the candidate who has successfully completed the recruitment process.
2. Click on the candidate's profile to open the detailed candidate information.

Review the candidate's profile before generating the offer.

Step 3: Open the Offer Letter Section

1. Within the candidate profile, navigate to the **Offer Letter** or **Generate Offer** section.
2. Click **Generate Offer Letter** or **Send Offer Letter**.

The offer letter configuration page opens.

Step 4: Select an Offer Letter Template

1. Click the **Offer Letter Template** dropdown.
2. Select the appropriate template based on the job role or organization policy.

Using predefined templates ensures consistency across all employee offers.

Step 5: Verify Candidate Information

Review the candidate's details, including:

- Candidate Name
- Job Position
- Department
- Work Location
- Joining Date
- Reporting Manager

Ensure all information is accurate before proceeding.

Step 6: Enter Offer Details

Complete or verify the employment information, such as:

- Designation
- Employment Type
- Date of Joining
- Salary Package (CTC)
- Probation Period
- Other employment terms

These details will be included in the final offer letter.

Step 7: Preview the Offer Letter

1. Click **Preview** to review the generated offer letter.
2. Verify:
    - Candidate details
    - Salary information
    - Employment terms
    - Company information
    - Formatting

Carefully review the document before sending it to the candidate.

Step 8: Send the Offer Letter

1. Click **Send Offer Letter**.
2. The system sends the offer letter to the candidate's registered email address.
3. A confirmation message appears once the email has been sent successfully.

The candidate can now review the offer and respond electronically.

Step 9: Track Offer Status

1. Return to the candidate profile.
2. Review the **Offer Status** section.

Common statuses may include:

- Draft
- Sent
- Viewed
- Accepted
- Rejected
- Expired

This allows recruiters to monitor the progress of the offer.

Step 10: Follow Up with the Candidate

1. If the candidate has not responded, use the available communication options to send reminders or follow-up emails.
2. Record any updates in the candidate's profile.

Regular follow-ups help ensure a smooth hiring process.

Step 11: Update the Candidate Status

Once the candidate responds:

- If the offer is **Accepted**, move the candidate to the **Hired** stage.
- If the offer is **Rejected**, update the candidate status accordingly.
- If revisions are required, regenerate and resend the updated offer letter.

Keeping the candidate status updated ensures accurate recruitment tracking.

Key Benefits of Sending Offer Letters through ATS

- Quick and paperless offer generation
- Standardized offer letter templates
- Automated email delivery
- Centralized offer management
- Real-time offer status tracking
- Faster hiring process
- Improved candidate experience

End of Tutorial

You have successfully learned how to **generate and send an Offer Letter** using the TankhaPay ATS module. This feature streamlines the final stage of the recruitment process by enabling recruiters to create, send, and track offer letters efficiently from a centralized platform.

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