


# Filtering & Creating Segments

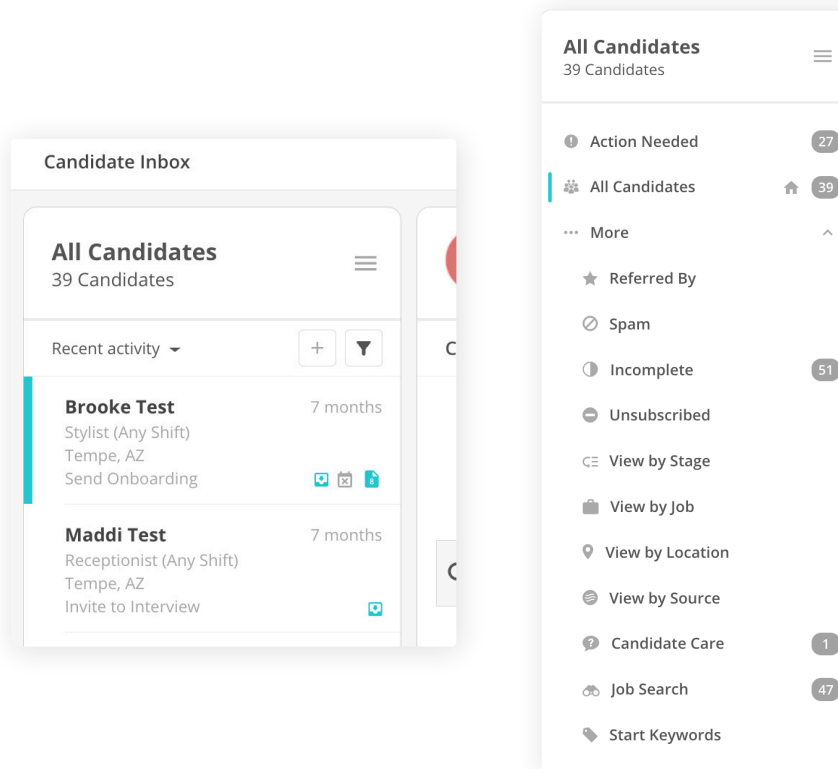


## What are filters?

- Filters allow a user to quickly view candidates at a specific stage in the candidate journey
- For example: A user can filter their candidates to just view candidates who have been scheduled for an interview.

## Preset Filters

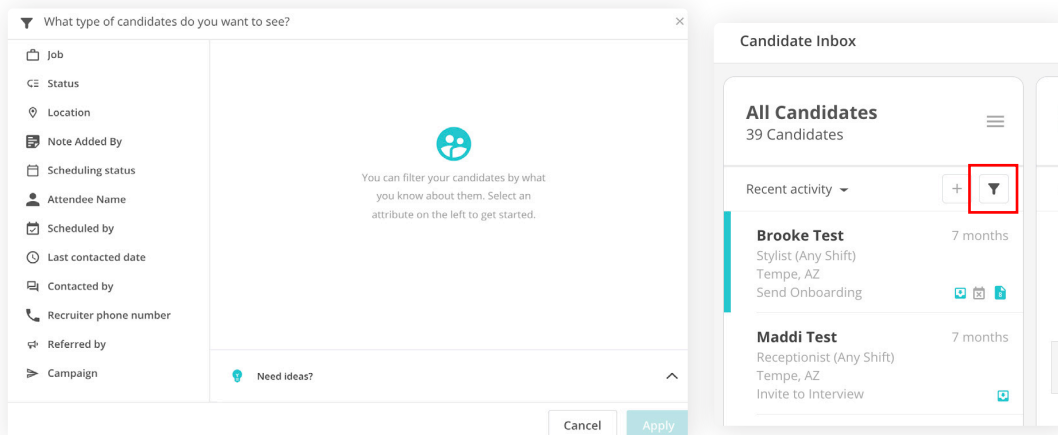
- Select  to easily filter candidates using preset filters.
  - **Action Needed:** This list view of candidates are those who require an action or decision from the users within the account.
    - This means these candidates need to be moved to the next statuses or stages within the hiring journey.
    - For example, inviting the candidates to a second interview, sending an offer letter to the candidate etc.
  - **All Candidates:** Any candidate who applies for your organization via Olivia.
  - **View by Stage:** what stage of the candidate journey they are in.
  - **View by Job:** View candidates by the job they applied for.
  - **View by Location:** View candidates by which location they applied for.



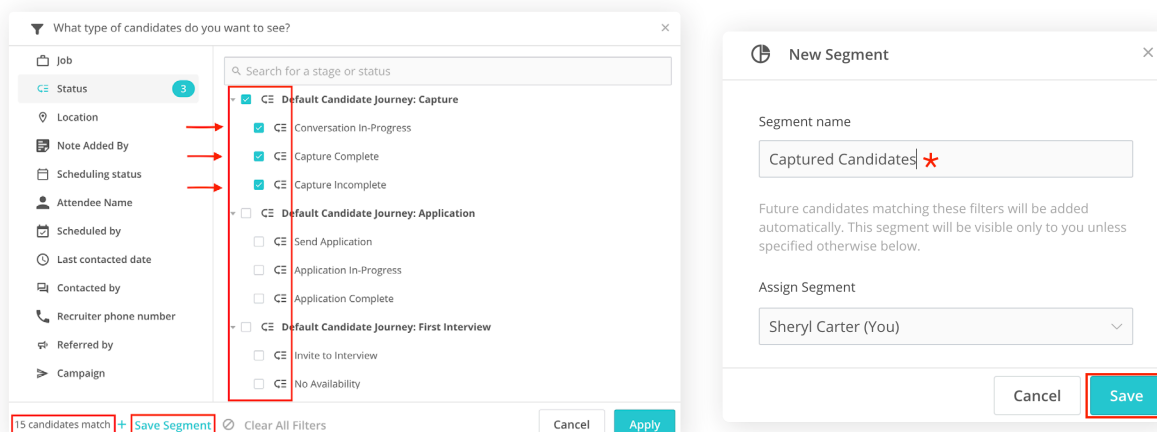
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## Custom Filters

- Creating custom filters:
  - Click on the filter icon in the top right corner of the candidates list to filter your **"All Candidates"** list.
  - The most common filter criteria will be filtering by a certain candidate status (ie viewing candidates that have completed a conversation with Olivia but weren't invited to an interview and are in a "capture complete" status). [Video here.](#)



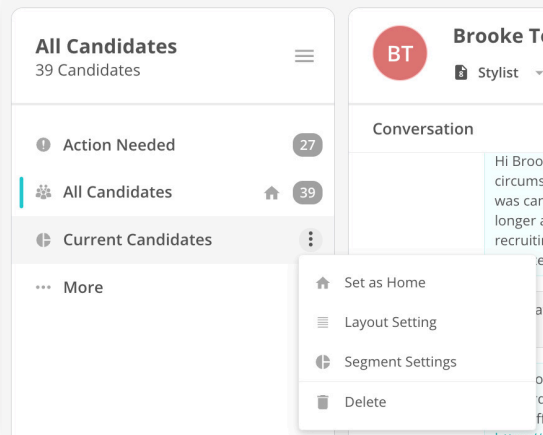
- Save filters as "Segments" on your account to easily access in the future.
  - Select the statuses
  - Select "Save Segment"
  - Name the segment
  - View the segment in your Candidate Inbox
    - *Please note: Company admin users can create segments and assign them to different users*



# Filtering & Creating Segments

## Custom Filter Settings

- **Set as Home:** If you want to save your new segment as your homepage, select Menu > and hover to the right of your new segment. Select the 3 dots on the side of the segment name and select "Set as Home"



**Layout Setting:** Allows you to change how your segment folder is laid out on the menu home screen.

**Segment Layout:** Allows you to change the name of the segment.

**Delete Segment:** If you find that you do not want the segment any longer, you can delete the segment in its entirety.