H HireBoard

APPLICANT TRACKING SYSTEM

User Guide

How to use HireBoard — for recruiters, hiring managers, and administrators.

Version 1.0.0

June 2026

Contents

1. Introduction 4
2. Signing In & the Dashboard 4
    Finding your way around 4
3. Jobs 4
    Creating a job 5
    Configuring pipeline stages 5
    Useful job actions 5
4. Candidates 5
    Adding a candidate 5
    The candidate profile 5
    Working in bulk 6
5. Application Pipeline 6
6. Interviews 6
7. Offers 6
8. Career Portal 7
9. Referrals 7
10. Reports & Analytics 7
11. Email Templates 8
12. Departments 8
13. Users & Roles 8
    The default roles 8

- Managing users ... 8

14. Settings ... 8

15. Backups ... 9

- Creating a backup ... 9
- Automatic backups ... 9
- Restoring a backup ... 9

16. Modules ... 9

17. Activity Log ... 9

18. Tips & FAQ ... 10

- A menu item is missing — why? ... 10
- Candidates aren't receiving emails ... 10
- How do I keep my data safe? ... 10
- I forgot my password ... 10

19. Support & Contact ... 10

Everything you need to run your recruitment process in HireBoard — from posting a job to making an offer. This guide is written for recruiters, hiring managers, and administrators using the application day to day. No technical knowledge is required.

1. Introduction

HireBoard is a complete applicant tracking system (ATS). It helps your team publish job openings, collect and organise candidates, move them through a hiring pipeline, schedule interviews, send offers, and measure how your recruitment is performing — all from one place.

The application is organised into **modules**. Each module covers one part of the hiring process and appears as an item in the left sidebar. An administrator can turn modules on or off, so your sidebar may show a subset of what is described here.

> **Roles matter.** What you can see and do depends on your role (Administrator, HR Manager, Recruiter, Interviewer, or Viewer). If a menu item or button described here is missing, your role may not have permission for it — ask your administrator.

2. Signing In & the Dashboard

Open the application URL provided by your administrator and sign in with your email address and password. After signing in you land on the **Dashboard**.

The Dashboard gives you an at-a-glance overview of recruitment activity — open positions, candidates in the pipeline, upcoming interviews, and key hiring metrics. Use it as your daily starting point; every widget links through to the relevant area.

Finding your way around

- **Left sidebar** — your main navigation, grouped into *Recruitment* (jobs, candidates, pipeline, etc.) and *Administration* (users, settings, backups).
- **Top bar** — shows your current location, notifications, and your account menu (profile and sign out).
- **Your profile** — open the account menu at the bottom of the sidebar to update your name, email, password, and avatar.

3. Jobs

The **Jobs** area is where you create and manage every position you are hiring for.

Creating a job

1. Go to **Jobs** in the sidebar and click **Create Job**.
2. Fill in the job title, department, description, location, employment type, and any other details.
3. Set the job status. An *open* job can receive applications; a *closed* job does not.
4. Save. Your new job now appears in the jobs list.

Configuring pipeline stages

Each job has its own set of **pipeline stages** — the steps a candidate passes through (for example: Applied → Screening → Interview → Offer → Hired). Open a job and choose **Manage Stages** to add, rename, reorder (drag and drop), or remove stages. A stage that still contains candidates cannot be deleted until they are moved.

Useful job actions

- **Open / Close** — toggle a job's status without opening the full edit form.
- **Duplicate** — clone a job as a draft, handy for similar roles.
- **Bulk close** — select several jobs in the list and close them at once.
- **Publish to the Career Portal** — make an open job visible on your public careers page so candidates can apply (see Career Portal).

4. Candidates

The **Candidates** area is your central database of everyone who has applied or been added manually.

Adding a candidate

Candidates arrive in two ways: automatically, when someone applies through the Career Portal, or manually, when you click **Add Candidate** and enter their details and résumé yourself.

The candidate profile

Open any candidate to see their full profile, which brings together:

- **Contact details and résumé** — downloadable, with links to portfolio or LinkedIn where provided.
- **Application history** — which jobs they have applied to and their current stage.
- **Notes** — internal comments your team can leave on the candidate.
- **Tags** — labels (such as a skill or source) you can use to group and filter candidates.

> **Duplicate detection.** When you add a candidate whose email matches an existing record, HireBoard warns you so you can avoid creating duplicates.

Working in bulk

From the candidates list you can select multiple people and apply an action to all of them at once — a fast way to tag, move, or process groups of applicants.

5. Application Pipeline

The **Pipeline** is a visual Kanban board for a job. Each column is a pipeline stage, and each card is a candidate's application.

1. Open the Pipeline and choose the job you want to review.
2. See every applicant arranged by the stage they are currently in.
3. **Drag a card** from one column to the next to advance (or move back) a candidate as they progress.
4. Click a card to open the application and review the candidate, leave notes, or take the next action.

The board gives you and your hiring team a shared, real-time picture of where everyone stands for a given role.

6. Interviews

The **Interviews** area lets you organise and record interviews.

1. Schedule an interview for a candidate, choosing the date, time, and type.
2. Assign one or more **interviewers** from your team.
3. After the interview, interviewers complete a **feedback scorecard** to record their assessment.
4. Track each interview's status (scheduled, completed, cancelled) so nothing slips through the cracks.

Collected scorecards give the hiring team a structured, comparable basis for decisions instead of relying on memory or scattered notes.

7. Offers

When you are ready to hire, the **Offers** area handles offer letters from creation to acceptance.

1. Create an offer for a candidate, based on a reusable **offer template**.
2. HireBoard generates a professional **PDF offer letter**.

3. Send the offer to the candidate.
4. Track the offer's status as it moves toward **acceptance**.

Templates mean every offer is consistent and on-brand, while the status tracking shows you which offers are outstanding at any time.

8. Career Portal

The **Career Portal** is your public-facing careers page. Visitors can browse your open positions and submit applications, which flow straight into HireBoard as new candidates.

- Only jobs you have **published** appear on the portal.
- Applications captured through the portal create candidate records automatically, attached to the relevant job's pipeline.
- Administrators can adjust portal settings from **Career Portal Settings** in the sidebar.

> **Always available.** The Career Portal is public — candidates do not need an account to browse jobs or apply.

9. Referrals

The **Referrals** area lets employees refer candidates and lets you track those referrals. A **My Referrals** view lets each team member see the people they have referred, and a leaderboard highlights your most active referrers — a simple way to encourage employee referrals, often one of the best sources of quality candidates.

10. Reports & Analytics

The **Reports** area turns your recruitment data into insight. Typical reports include:

- **Hiring funnel** — how candidates progress (and drop off) through your stages.
- **Source effectiveness** — which channels bring you the best candidates.
- **Time to hire** — how long roles take to fill.
- **Recruiter performance** — activity and outcomes by team member.

Use these to spot bottlenecks, justify decisions, and improve your process over time.

11. Email Templates

Email Templates let you write reusable messages — for example an application acknowledgement or an interview invitation — with **variables** that are filled in automatically (such as the candidate's name or the job title). This keeps your communication fast, consistent, and personal.

12. Departments

Departments let you organise users and jobs into teams. You can assign a department head and filter reports by department, which is useful once you are hiring across several teams.

13. Users & Roles

Administrators manage who can access HireBoard under **Users** and **Roles & Permissions**.

The default roles

Role	Typical access
Administrator	Full access to everything, including settings, modules, and backups.
HR Manager	Manage jobs, candidates, interviews, and offers across the organisation.
Recruiter	Day-to-day sourcing and pipeline work.
Interviewer	View assigned candidates and submit interview feedback.
Viewer	Read-only access for stakeholders who need visibility.

Managing users

1. Go to **Users** and click **Add User**.
2. Enter their name and email, set a password, and choose a role.
3. Save. The user can now sign in with the access their role grants.

Under **Roles & Permissions** you can fine-tune exactly which permissions each role holds.

14. Settings

Settings (Administrator only) is where you configure the application:

- **Company** — your company name and logo, used across the app and on generated documents.

- **Mail** — your outgoing email (SMTP) account, so the system can send notifications. Enter your server details and send a test email to confirm.
- **System** — general preferences such as items shown per page and timezone.

15. Backups

The **Backups** area (Administrator only) protects your data. A backup is a single archive containing your database and your uploaded files (résumés, logos, offer letters).

Creating a backup

1. Go to **Backups** and choose whether to include uploaded files (recommended).
2. Click **Create backup now**. The new backup appears in the list, where you can download or delete it.

Automatic backups

Under **Schedule & retention** you can set automatic backups to **Daily** or **Weekly** — no technical setup required. You can also set how many backups to keep; older ones beyond that number are removed automatically.

Restoring a backup

> **Restoring replaces your current data.** HireBoard automatically creates a fresh safety backup before restoring, and asks you to type `RESTORE` to confirm. Use this only when you genuinely need to roll back.

16. Modules

The **Modules** area (Administrator only) lets you turn features on or off. Disabling a module hides it from the sidebar but **never deletes its data** — you can re-enable it later and your information is still there. Each card shows the module's status and any modules it depends on.

17. Activity Log

The **Activity Log** (Administrator only) records important actions taken in the system — who did what, and when. It is useful for accountability and for understanding recent changes.

18. Tips & FAQ

A menu item is missing — why?

Either the module is disabled (ask an administrator to enable it under Modules) or your role does not have permission for it.

Candidates aren't receiving emails

Ask your administrator to check **Settings → Mail** and send a test email. Email sending depends on a correctly configured SMTP account.

How do I keep my data safe?

Turn on automatic backups under **Backups → Schedule & retention**, and occasionally download a backup to keep a copy off the server.

I forgot my password

Use the password reset link on the sign-in page, or ask an administrator to set a new password for you under Users.

19. Support & Contact

We're here to help. Please use the channel that matches your request so we can respond quickly:

- **Product support (for purchased items)** — support@mes-dev.com. Include your CodeCanyon **purchase code** and your HireBoard version so we can assist you faster.
- **General inquiries, customizations, or a new application** — contact@mes-dev.com.

Product support covers installation help, bug fixes, and questions about documented features, in line with the item's support policy on CodeCanyon.