

# Manage Event Attendees

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# How to Invite Candidates to an Event

From within Salesforce, you can go to a Candidate's page.

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# How to Add a New Branding Image

From your Home Screen, click the “Setup” button in the top right corner.

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From your Profile, switch to Salesforce Classic.

[image-1620682271905.png](#)

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This will show you another view.

Go to the “+” icon at the top of the page.

Capture7.PNG

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This will take you to this next screen.

Capture8.PNG

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Go to Documents. **NOTE: All tabs on this screen are alphabetical for ease of navigation.**

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This will take you to the Documents page.

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Click “New.”

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All red fields are required.

Name your Document (Image).

Hit tab, and the Document Unique Name will be created automatically.

Click the “Externally Available Image” box.

Folder: Choose “Shared Documents.”

[image-1620682579399.png](#)

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Select the File/Image you wish to Upload.

**HIT SAVE.**

From the Shared Documents Folder, you can see all the images that have been uploaded.

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To see a particular image and get its URL to add to an event, click “View.”



This will open the image in a new tab.

[Capture9.PNG](#)

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Copy the URL and add it in the Branding Image URL.

# How to Convert a Candidate Who “Registered” into “Attended”

From the Attendees Tab of the Salesforce Event page, click Attended ID to open the candidate profile.

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Go to the pencil near the attended box to edit.

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Click in the box to create a check mark.

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**HIT SAVE.**

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This shows the candidate attended.

The following fields are filled in by the Recruiter or Hiring Manager. To fill in the following fields, you must click the pencil to edit.

**Resume Reviewed**

**Interviewed**

**Attendee Selected**

**Position Title** – Type in the position title for which the Candidate is selected

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Before the Candidate Journey is completed, download the candidate documents in preparation for submitting a By Name Request RPA through the staffing process.

If an attendee is selected, the Candidate Journey must be completed.

Open the Attendee Tab – Find the Candidate who was selected – double-clicking on the candidate to open.

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Before the Candidate Journey is completed download the candidate documents in preparation for submitting a By Name Request RPA through the staffing process.

Go to Notes & Attachments and download the documents.

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After all required documents are downloaded, change the Candidate Owner to yourself.

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Click the Icon to edit.

Type your name in the search bar.

Select your name.

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Click Change Owner.

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The next step is to move the Candidate to Converted.

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Click on the Converted tab.

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Then Click Select Convert Candidate Status.

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Click Convert.

The Candidate is removed from the candidate pool and moves to the Employee tab, which completes the Candidate Journey.

# Attachments, Notes, and Metrics on the Event

When an update is received or at the conclusion of an event, the Recruiter or Action Officer should include in the following in the note section:

- Number of targeted Vacancies
- Number registered in Salesforce
- Number of interviews
- Number of selections

Add Notes.

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Click New to add a Note.



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Recruiter or Action Officer attached any documents received for the Digital events (i.e., spreadsheet/pics) and the EPAW.

Add a File.

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Files can be added two ways:

- Search Files available in Salesforce
- Upload Files from a folder on your computer

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[image-1620692429896.png](#)

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Once the file is uploaded, click Done.

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To View, Add, or Delete Files, click View All.

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# How to Clone an Event

If you are creating an event similar to one that is already created within Salesforce, you can Clone that Event. Cloning will copy all the information entered into a “New” Event. Then you can simply change the relevant information for your Event.

From the Events tab, choose the Event you would like to Clone.

From the specific Salesforce Events page, click the Clone button in the top right corner.

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This will open a new window with all the details from the cloned Event already populated in the fields.

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Simply update the fields you would like to change for your Event and hit **SAVE.**

# Upload a Resume at an (Physical) Event

Go to the Candidates tab and Search for the candidate whose Resume you would like to upload.

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Or Create New candidate.

From within the Candidate Screen, click “Capture Image.”

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This will open a new window and allow you to take photos with your mobile device.

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Click “Take Photo” to capture the resume (or other documents), add a File Name, and click Upload Images. Multiple Images (of a two-page resume, for example) will be saved in the same attachment.

The file will now be associated with the Candidate.

It can be found in Notes & Attachments and can be downloaded for review.

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# Using Reports to Manage Event Attendees - Video