

Manage Event Attendees

- [How to Invite Candidates to an Event](#)
- [How to Add a New Branding Image](#)
- [How to Convert a Candidate Who “Registered” into “Attended”](#)
- [Attachments, Notes, and Metrics on the Event](#)
- [How to Clone an Event](#)
- [Upload a Resume at an \(Physical\) Event](#)
- [Using Reports to Manage Event Attendees - Video](#)

How to Invite Candidates to an Event

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

[image-1620682197504.png](#)

Image not found or type unknown

How to Add a New Branding Image

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

[image-1620682241787.png](#)

Image not found or type unknown

From your Profile, switch to Salesforce Classic.

[image-1620682271905.png](#)

Image not found or type unknown

This will show you another view.

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

[Capture7.PNG](#)

Image not found or type unknown

This will take you to this next screen.

[Capture8.PNG](#)

Image not found or type unknown

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

[image-1620682485869.png](#)

Image not found or type unknown

This will take you to the Documents page.

[image-1620682528294.png](#)

Image not found or type unknown

Click "New."

[image-1620682548693.png](#)

Image not found or type unknown

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](#)

Image not found or type unknown

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.

[image-1620682610774.png](#)

Image not found or type unknown

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](#)

Image not found or type unknown

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.

[image-1620682789150.png](#)

Image not found or type unknown

Go to the pencil near the attended box to edit.

[Capture10.PNG](#)

Image not found or type unknown

Click in the box to create a check mark.

[Capture11.PNG](#)

Image not found or type unknown

HIT SAVE.

[image-1620683002226.png](#)

Image not found or type unknown

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

[image-1620683102224.png](#)

Image not found or type unknown

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.

[image-1620683164845.png](#)

Image not found or type unknown

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.

[image-1620683292943.png](#)

Image not found or type unknown

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

[image-1620683342994.png](#)

Image not found or type unknown

Click the Icon to edit.

Type your name in the search bar.

Select your name.

[image-1620683411843.png](#)

Image not found or type unknown

Click Change Owner.

[image-1620683482573.png](#)

Image not found or type unknown

[image-1620683527478.png](#)

Image not found or type unknown

The next step is to move the Candidate to Converted.

[image-1620683583597.png](#)

Image not found or type unknown

Click on the Converted tab.

[image-1620683646887.png](#)

Image not found or type unknown

Then Click Select Convert Candidate Status.

[image-1620684106714.png](#)

Image not found or type unknown

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.

[image-1620691890227.png](#)

Image not found or type unknown

[image-1620691977917.png](#)

Image not found or type unknown

Click New to add a Note.

[image-1620692068655.png](#)

Image not found or type unknown

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

Add a File.

[image-1620692211861.png](#)

Image not found or type unknown

Files can be added two ways:

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

[image-1620692300079.png](#)

Image not found or type unknown

[image-1620692429896.png](#)

Image not found or type unknown

Once the file is uploaded, click Done.

[image-1620692609034.png](#)

Image not found or type unknown

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

[image-1620692756088.png](#)

Image not found or type unknown

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.

[image-1620693610238.png](#)

Image not found or type unknown

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

image-1620693640996.png

Image not found or type unknown

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.

[image-1620693721453.png](#)

Image not found or type unknown

Or Create New candidate.

From within the Candidate Screen, click "Capture Image."

[image-1620693763256.png](#)

Image not found or type unknown

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

[image-1620694148198.png](#)

Image not found or type unknown

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.

[image-1620694213797.png](#)

Image not found or type unknown

Using Reports to Manage Event Attendees - Video