Events: Creating and Managing Attendees

What is an Event in Salesforce?

Introduction

Events are created by a Recruiter and contain information such as the event name, location, time and date of the event, open and close dates of candidate registration, position information, documentation needed for registration, and marketing and branding content. The creation of an event includes a unique URL for posting on social media and is used to market the event. The event URL allows candidates to register for the event and upload resumes and other employment documentation.

While events are created by Recruiters in Salesforce, they will enlist the help of our AFCS Marketing Personnel on all Marketing and Branding items/tasks that will be viewed by the public to maintain continuity and consistency.

Hiring Managers and Recruiters can view candidates who have registered through an event and can review resumes and employment documents to schedule interviews.

Events have three distinct pages associated with them:

1. **Events within Salesforce** – Where Recruiters and Hiring Managers can view event details and see associated candidates within Salesforce

2. **Public-Facing Event Page** – The unique URL that is generated when an event is created.

2. **Event Registration Page** – The registration page that is associated with the event where candidates input their information for consideration.

Finding Events Within Salesforce

The Event tab can be found at the top of the Home screen.

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Events Within Salesforce

This will get you to the Event listings within Salesforce.

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From this page, you can see a listing of events, their Start and End dates, the status of particular events within Salesforce, each event’s URL, and who created the Event within Salesforce.

Note: This might not be the screen you see when you arrive at the Events page.

You can choose to adjust the view by clicking the arrow and choosing from the dropdown menu.

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How to Navigate Within the Events Tab

If you click on any of the Event names (in blue), you will be taken to a separate page for that unique Event.

Details

It will automatically show the “Details” tab.

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Attendees

You can click on the Attendees tab to see candidates associated with that Event.

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Candidates are associated with an event by registering on the **Public-facing Event** page.

Public-Facing Event Page

Public-Facing Event Page

Click Register

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By clicking on the Register button, candidates will be taken to the Event Registration page for that Event. Each event will have a unique registration page.

Event Registration Page

Registering for an Event

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By filling out the registration page, a Candidate will be associated with the Event.

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How to Create an Event

Filling Out Event Information

Create New Event

From the Event tab, click “New.”

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Event Name

This is a required field and will be the Event title on the autogenerated Public-facing Event page.

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Virtual Event

Click this option if the Event is being held virtually. If the Event is virtual, you do not need to enter any information about the venue.

Venue Street, City, State, and Zip Code

These details will create a pin on a Google Map on the public Event page.

Event Contact Name

This will autogenerate as you begin to type in a name. Note: the creator of the Event is not automatically listed as the Event Contact.

The Event Contact should be the primary Point of Contact for the Event. This could be external (for a national conference, for example) or internal (for a Digital Hiring Initiative).

Status

There are four status stages for Events:

1. Draft

This is the stage where the Event is being created.

2. Active

Active indicates that the Event is ongoing. The associated URL can be actively used for marketing and promotional purposes, and the Event can be associated with registered candidates.

3. Completed

When an event is over, change the Status to “completed.”

4. Canceled

Indicates that an event has been canceled.

Event Start Date

This is a required field. Click the Calendar icon and chose the date.

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The clock icon in the “Time” field opens a dropdown menu. **NOTE: All times currently indicate Central time.**

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Event End Date

This is a required field. Enter the Event End Date and Time.

Registration Start Date

This indicates the time Candidates can begin to register for an event.

Registration End Date

This indicates the end of the registration period. The registration period can continue through the end of an event.

Budget

Add budget if available as it helps determine the ROI of an event.

Description

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This is a text box where you can enter all the information about the event. This will appear on the Public-facing Event page. The buttons at the top allow you to customize and format how the text appears. **Note: Remove special characters when Cutting and Pasting into this field.**

Event URL

This will be autogenerated by the system. This does not refer to an outside registration process.

Branding Image URL

The Branding Image is the banner image that appears on the Event Page. This is the only way to add an image to the Public-facing Event page. The branding image must already be uploaded to the internet. You can copy and paste this URL from another event. Or you can add one to Salesforce Documents.

See…How to add a new Branding Image

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The Branding Image must already be uploaded into Salesforce in order to be visible. See **How to add a banner image**

Event Type

Event type indicates what kind of Event it will be. When you click on the field you will be able to choose from the following options:

- Career Fair
- Classroom Presentation
- Conference
- Diversity Event
- Information Session
- On-Campus Interview
- On-Site Interview
- Networking Event
- Online Application Portal
- Club/Organization Event
- Job Fair
- Hiring Event

- Outreach

Online Application Portal

This works like a virtual event or hiring initiative. It allows interested candidates to register and enter their information without being tied to a **specific job**.

Manage Event Attendees

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.

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This will show you another view.

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

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This will take you to this next screen.

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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.”

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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.

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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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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