

Personalizing Screens

Now that you understand how different objects are organized within Salesforce, basic navigation, and the fundamental processes, we recommend that you personalize your screens to help you manage your applicant pool more efficiently.

These screens can help organize all the information in Salesforce so that you only see the information that is relevant to you and personalize the information to best suit your needs.

What follows is our recommendation for Hiring Manager screen personalization. As you get more confident, you may further customize your screens to better suit your workflow.

There are two tabs we recommend personalizing: Jobs and Job Applications.

Jobs

All Jobs can be found under the Jobs tab. This serves as a database for all jobs irrespective of status or method of creation.

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If you click on a Job Name (highlighted in blue), it will open the job, so the details of the job profile are viewable.

Create Clone

Select Job Pool from the dropdown.

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Locate the gear on the right top of your screen and click the dropdown arrow.

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A Clone allows you to duplicate the information using the primary Job Pool information without affecting the way in which anyone else sees or accesses the information. It allows you to organize

your views in a way that best fits your needs.

Upon selecting Clone, the following window will pop up.

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Select a unique name for your list and keep the default choice “Only I can see this list view.”

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Your personalized list is now available from the Jobs tab.

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Pin it (using the thumbtack icon) to make sure it is the first list view that appears each time you return to the tab.

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Notice the Pin has changed from sideways gray to upright blue.

Add a Filter

To see only your Jobs within your new Clone/List view, add a filter.

A filter (the funnel-shaped icon at the top left on your list view) allows you to choose which information you see.

To see only your jobs, you would add a filter that chooses your role, Hiring Manager, and your name (First and Last).

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NOTE: Name must be spelled exactly how it appears in the system.

Click Save.

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Now in your personalized list view, you should only see the Jobs (positions) assigned to you.

Choose Fields

To personalize your view within your new Clone, you can also choose which fields (or pieces of information) are visible on your screen.

From your list view, click the gear icon and choose “Select Fields to Display.”

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This allows you to add and remove fields to suit your needs.

The left menu identifies all the fields you can have.

The right menu identifies the fields you WANT to see. In addition, the right menu shows the order of the fields.

The arrows on the right side of each menu allow you to add and remove fields.

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Job Applications

Select the Job Applications tab, click the drop-down menu, and select "All" option

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Locate the Toggle Button on the top right of your screen and click the drop-down arrow.

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A window will pop up, allowing you to create a clone.

- A Clone allows you to duplicate the information using the primary "All" information
- You will have the ability to personalize this information that best fits your functionality

Select a name unique to you. Ensure the "Only I see this list view" option is selected, then click Save.

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The Clone you created should appear on the screen. To have this screen show every time you click on the Job Application, you need to Pin your clone. Click the Pin button next to the title.

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Once you click the Pin button, you should see the following information pop up on your screen to validate your personalized screen that is now pinned and will show every time you click on the Jobs tab.

Notice the Pin has changed from sideways gray to upright blue.

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If you only want to see your jobs within your new Clone, you might consider the following:

- If your Filter has not already been activated, click the Filter button at the far right of your screen
- When it is active, it will be highlighted
- Notice the Filter box below
- Select "Add Filters"

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Click Save.

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Now you should only see applicants assigned to you within the Job Applications tab. Since it is also Pinned to your clone, this screen setup should show when you click the Jobs tab.

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To personalize your view with Jobs, click on the gear icon and a drop-down menu will appear. You now have more options available to you. To change the fields you wish to see, click "Select Fields to Display."

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