How do I ...? A Task Cross Reference Guide

A guide for common issues and challenges that arise for new users in Salesforce.

Request a license?

Request a license?

Upon receiving a job requisition request from a Hiring Manager, the Recruiter will request a license for the Hiring Manager from the Team Chief/Administrator.

For more information see the Hiring Manager Guide.

Login

Login

Once you have properly set up your account you can login to Salesforce at any time while you have your license. The link to the login screen is https://afcs.my.salesforce.com/

Bookmarking the page while you are in the midst of your search is highly recommended.

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Note: Going directly to Salesforce.com login will not let you log in. You will get an error. It is important to always use the above link.

Navigate within Salesforce?

Home Page – What's there? What will I use?

Everyone who has a license for AFCS Salesforce will enter into the same Home page/Dashboard. The tabs at the top might appear different depending on your assigned role within Salesforce, which is associated with a specific level of access.

When you have logged in to Salesforce you will see the following Dashboard/Homepage. This has been customized to have all the primary things you need in easy view.

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As you run your mouse over the screen, you will notice that many items become underlined or highlighted. Clicking any of these items within the dashboard will take you to the corresponding page.

Additionally, you will notice that there are charts and graphs on the Dashboard. Each one provides a live, quick view of a report within Salesforce and is updated regularly.

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Clicking the View Report button will take you to the full report.

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Navigate within Salesforce?

Basic Navigation

Anything blue is clickable and will initiate an action. Usually, it will give you more information. Anything that is highlighted when you scroll your mouse over it will also take you to the new screen.

On any screen you can click on any of the tabs, to move to that view.

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Home will always return you to the Dashboard.

Candidate Tab

The Candidate Tab allows you to search by candidate’s name. It is the same complete list of all candidates, just organized differently.

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As with the Job Application Tab, you can filter and sort the information in several ways: Name, Occupation of Interest, Career Area of Interest, and Professional Status (i.e., Veteran, Student, Professional etc.).

Job Applications

The Candidate Tab allows you to search by candidate’s name. It is the same complete list of all candidates, just organized differently.

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As with the Job Application Tab, you can filter and sort the information in several ways: Name, Occupation of Interest, Career Area of Interest, and Professional Status (i.e., Veteran, Student, Professional etc.).

Candidate Profile

From this page you can see all the information related to this candidate in order to evaluate them.

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Along the top of the page is a quick view of where the candidate is in the process:

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In this instance, the candidate is “new.”

Below this are the tabs that allow you to access more information:

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It is from these tabs that resumes and other documents associated with a candidate can be downloaded.

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Clicking on any of the highlighted documents will allow you to download them.

What if I don’t see the AFCS Logo?

What if I don’t see the AFCS Logo? How do I get to the right page?

If you are not on the right page, you will not able to accomplish your tasks within Salesforce. AFCS has a highly customized version, built specifically to meet our needs and our workflow.

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If you do not see the logo click the image-1603203665169.png Image not found or type unknown icon in the upper left-hand corner and a search bar will appear. Type AFCS and “AFCS – Talent Acquisition (TA)” should appear. Click to load.

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Personalize Salesforce Screens (For Hiring Managers)?

Why personalize (clone) Salesforce Screens?

Personalizing Salesforce Screens allows you to easily access the information you need, organized in a way that best fits the functionality you require. Modifying tab views based on your personal preference helps to manage your applicant pool more efficiently. You can set up what fields you want to see, and how the Salesforce information is organized without having to navigate multiple screes.

We recommend personalizing the following tabs:

- Jobs
- Job Applications

Step 1

Select the Jobs tab. Be sure "Job Pool" is selected.

- To select "Job Pool," click the drop-down arrow next to the title
- Locate "Job Pool"

NOTE: You can only clone "Job Pool" if you have created any other clones.

step-1.png

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Step 2

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

step-2.png

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Step 3

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

- A clone allows you to duplicate the information using the primary Job Pool information
- You will have the ability to personalize this information that best fits your functionality

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

The click Save.

step-3.png

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Step 4

The Clone you created should appear on the screen. To have this screen show every time you click on the Job tab, you need to pin your clone.

Click the Pin button next to the title.

step-4a.PNG

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Once you click the Pin button, you should see the following information pop up on your screen. Now that you've validated your newly pinned personalized screen, it will show every time you click on the Jobs tab.

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

step-4b.png

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If you only want to see your jobs within your new clone:

- Click the filter button at the far right of your screen if your filter has not already been activated (viewable)
- When it is active, it will be highlighted
- Notice the filter box below
- Select "Add Filters"

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Step 5

Click Save.

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Now you should only see the positions (Jobs) assigned to you. Since it's also pinned to your clone, this screen setup should show when you click the Jobs tab.

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Step 6

Personalize your view with Jobs by clicking on the toggle drop-down menu. To change the fields you wish to see, select "Select Fields to Display"

step-6.png

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Step 7

Follow the details and instructions below:

- 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 visible order of the fields
- Notice the arrows on the right side of each menu

step-7.PNG

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To view all of your changes, click Save.

Manage My Applicants (For Hiring Managers)?

Step 1

There are several ways to manage your applicants. This is one way to become familiar with the Salesforce platform.

Once you have your personalized Jobs tab, it would be best to manage your positions on this screen.

To begin, select a position you want to view.

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Step 2

There are a couple important components to this page:

- Job Applications
- Job URL

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Step 3

To view your applicants, click the Job Applications link, then click the Candidate's name.

Do NOT click the Job Application #.

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Step 4

There a few key fields to keep track of:

- Stage
  - Provides what stage the candidate's application is at (more detail to come)
  - Hiring Manager Evaluation: Candidates are ready for your initial viewing
  - Awaiting Recruiter Review: Candidates are waiting for a recruiter to review

step-14a.png

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- Candidate
  - To begin reviewing a candidate's application, click the Candidate's name.

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Step 5

Once you click into the candidate's application, you will have the visibility of all the member's personal and professional information. Take a minute to scroll through the member's information (in your account).

To view the member's documents, scroll your mouse over the Files link. Now, you have a quick view of all the member's documents.

Click Files.

step-15.png

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Step 6

You will be directed to a new window only displaying the member's files. To view a document, click on the document you want to open.

step-16a.png

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The following screen will appear. Click the Download button at the top.

step-16b.png

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Step 7

To close this view, click the "X" in the upper right-hand corner of your screen.

step-17.png

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Request a Job Requisition be created?

Request a Job Requisition be created

Make a request through MyPers.

The request will go to the Talent Acquisition Team

A Recruiting Manager will assign it to a Talent Acquisition Consultant (recruiter) and they will build the Job Requisition.

Upon approval by a Recruiting Manager the Job Requisition will be converted to an active Job.

When a job is active within Salesforce, a license will be issued to the Hiring Manager

Adding a Branding Image to an Event

Adding Brand 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. Click the “+” icon at the top of the page.

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This will take you to this 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.

Click “New.”

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This will open a new screen where you can upload your image.

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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. Copy the image URL and return to the Event Setup page in Salesforce.

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To get the event, switch back to Lightning Experience.

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Search for an event from the Event tab.

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Paste the image URL and add it in the Branding Image URL within the event.

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Stage vs Status

An explanation of the difference between application STAGE vs Candidate STATUS

Stage

Stage refers to the phases of the job application process.

- Awaiting Recruiter Review
- Hiring Manager Evaluation
- Approved - Resume Review
- Interview
- Offer Submitted
- No Offer
- Closed
- Not Qualified
- Not a Good Fit

Status

Status relates to where a Candidate is along that journey

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There are 5 status positions in the Candidate journey

- New
- Recruiter Screening
- Hiring Manager Evaluation
- Interview
- Converted

Stage vs Status

Candidate Status/ Job Application Stage Process Alignment

Candidate Status/ Job Application Stage Process Alignment:

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You can see that Candidate Status and Job Application Stage correspond but are not the same.

A candidate can be under review for two different jobs, that is, they are being reviewed through Job Applications as well as within their own Candidate page.

The Candidate below has a Hiring Manager Evaluation Status (that is, he has been assigned to a recruiter and that recruiter has reviewed his application.)

But you can also see that the Candidate has multiple Job Applications associated with him.

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When we look at thes applications, we can see that they are many different Stages of the Job Application process.

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