

Salesforce Process Overview

An overview of the Candidate Journey within Salesforce

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From Need to Filled

The process below outlines the candidate journey within Salesforce, from a candidate's entry into the system with their online application and associated resume to the job being filled.

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New

- Candidate(s) that has NOT been assigned to a job i.e., is part of the talent pool to viewed by a recruiter
- Can be assigned to an open job as needed
- Serves as a database for potential candidates to fulfill open jobs

Recruiter Screening

- Candidate(s) that HAS BEEN assigned to a job(s) and is being vetted by the recruiter
- Stage populated and kept based on the status of the latest job application tied to a candidate
- Recruiter reviews data such as work history, geography, skills, etc.
- Recruiter captures notes about a candidate under the “Recruiter Notes” text box
- Recruiter makes the following dispositions, each of which activates an automatic process in Salesforce
 - Not Qualified - When a job applicant is deemed "not qualified" by a recruiter, they will receive an automatically generated email and be moved back to the general candidate pool
 - Not a Good Fit - When a job applicant is deemed "not a good fit" by a recruiter, they will receive an automatically generated email and be moved back to the general candidate pool
 - Hiring Manager Evaluation - When an applicant is approved for further review by a Hiring Manager, the Hiring Manager will receive an automatically generated email letter letting them know that a new candidate is in their queue for evaluation

Hiring Manager Evaluation

- Candidate(s) that a recruiter submits for review and approval to the assigned hiring manager
- Submission is prompted when the hiring manager name is selected in the “Assigned To” field
- Hiring manager captures notes about a candidate under the “Hiring Manager Notes” text box
- Approval process for candidate as part of this stage include the following statuses:

Candidate Review

- Selected by the hiring manager which will allow the listed candidate to move to the next stage
- Notification is auto-prompted to the recruiter and recruiting manager for status change on candidate approval

Interview

- A candidate must be in the “Candidate Review” stage to interview
- Hiring manager conducts interview with candidate
- Interview Date, Time, and Associated Notes added to the appropriate fields

No Offer

- Selected by the hiring manager which will remove the candidate from the job
- Stops the candidate lifecycle process and moves the candidate automatically to the “New” status
- Automatically removes the job from candidate-related list of “Active Job Applications”
- Notification is auto-prompted to the recruiter and recruiting manager for status change

on candidate approval

Offer

- Selected by the hiring manager which will automatically convert the candidate to an “employee”
- End of the candidate lifecycle process and the start of the onboarding process
- As an employee, the individual will no longer show on the candidate pool