

# Winter '22 Release Notes Configuration Guide

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# Purpose

This guide prepares a client system to make use of TargetRecruit's Winter '22 release, which includes a redesigned Candidates Search user interface and the ability to customize the data fields that appear on the Resume Drag & Drop screen before parsing.

# Prerequisites

Before progressing in this guide, you must install the following packages onto the client system:

TargetRecruit Managed 6.202

TRINTG (Integrations Package) 1.35

#### To verify

- From the TargetRecruit Home page, click the **Setup** gear icon on the top right of the screen.
- In the Search in the left pane, search for "Installed Packages".
- Scroll down to verify the installed packages include the versions above.

| III SET                           | up<br>stalled Pa                       | ckages                                    |                                    |                                    |           |                      |                   |                    |                               |           |         |      |            |                 |
|-----------------------------------|----------------------------------------|-------------------------------------------|------------------------------------|------------------------------------|-----------|----------------------|-------------------|--------------------|-------------------------------|-----------|---------|------|------------|-----------------|
| Packages.                         |                                        |                                           |                                    |                                    |           |                      |                   |                    |                               |           |         |      | alestorre  | annexchange     |
| Apps and comp<br>allows you to te | onents are install<br>st and customize | ed in packages.                           | Any custom apps,<br>You can deploy | tabs, and custom the components in | objects a | are initially marked | as "In Developr   | ment" and are no   | t deployed to<br>clicking Dep | your us   | ers. Th | is 🤇 | linesjonce | appenentinge    |
| Depending on t                    | he links next to a                     | n installed nacka                         | ne vou can take o                  | lifferent actions from             | m this n  | ane                  |                   |                    |                               |           |         |      |            |                 |
|                                   | skass, eliek Upin                      | atall. To manage                          | ye, you can take t                 | aneren actions not                 | n uns p   | aye.                 |                   |                    |                               |           |         |      | Visit Ap   | pExchange »     |
| o remove a pa                     | ckage, click Unin                      | istall. To manage                         | e your package lic                 | enses, click Manag                 | le Licen  | ises.                |                   |                    |                               |           |         |      |            |                 |
| Installed Pa                      | ackages                                |                                           |                                    |                                    |           |                      |                   |                    |                               |           |         |      |            |                 |
| Action                            | Package Name                           | Publisher                                 | Version Number                     | Namespace Prefix                   | Status    | Allowed Licenses     | Used Licenses     | Expiration Date    | Install Date                  | Limits    | Apps    | Tabs | Objects    | AppExchange Rea |
| Uninstall                         | Back Office to<br>Timesheet            | TargetRecruit<br>Back Office<br>Timesheet | 2.16                               | BOFTS                              | Free      | N/A                  | N/A               | N/A                | 9/3/2019,<br>6:35 AM          | ~         | 0       | 0    | 5          | Not Passed      |
| Uninstall                         | TRINTG                                 | Integrations<br>Dev                       | 1.35                               | TRINTG                             | Free      | N/A                  | N/A               | N/A                | 9/3/2019,<br>6:06 AM          | ~         | 0       | 0    | 3          | Not Passed      |
| Uninstall                         | Salesforce<br>Connected<br>Apps        | Salesforce.com                            | 1.7                                | sf_com_apps                        | Free      | N/A                  | N/A               | N/A                | 9/5/2019,<br>5:12 AM          | 1         | 0       | 0    | 0          | Not Passed      |
|                                   | Description<br>This package of         | contains Connect                          | ed Applications fo                 | r all the officially su            | pported   | Salesforce client a  | applications such | h as Touch, Sales  | sforce for Ou                 | tlook, Sa | I       |      |            |                 |
| Uninstall                         | TargetRecruit<br>Managed               | TargetRecruit                             | 6.202                              | AVTRRT                             | Active    | Unlimited            | 0                 | Does not<br>Expire | 9/3/2019,<br>6:03 AM          |           | 2       | 17   | 99         | Passed          |
| Uninstall                         | Back Office                            | TargetRecruit<br>LLC                      | 2.4                                | TRBOF                              | Free      | N/A                  | N/A               | N/A                | 9/3/2019,<br>6:29 AM          | ~         | 2       | 9    | 19         | Not Passed      |

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## **Configuration Setup**

- Switch to Salesforce Classic (if not already there).
- Click **Setup** on the left pane's Admin Tools.

| '<br>View Report (My Open Jobs By Account) | '<br>View Report (All HotBooks) | View Report (Active Placements by Account) | Candidate search         |
|--------------------------------------------|---------------------------------|--------------------------------------------|--------------------------|
| Job Applicants By Account                  | Interviews By Job               | Roll Offs By Account                       | TargetRecruit AdminTools |
| Record Count<br>0 20K 40K                  | Record Count                    | 1                                          | Setup                    |

• Click **Setup** to align the upgraded packages to the existing configuration of the client's system.



### **Verify No Batch Processes Are Running**

• Click **Setup** from the TargetRecruit Home page.

|                                                                                                                                               | All 🔻 Q. Search                                                     |                                     | * 🗄 🌧 ? 🏟 🖡 🐻    |
|-----------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|-------------------------------------|------------------|
| IARGETRECRUIT LI Home                                                                                                                         | Clients V Contacts V Jobs V Candidates Search V Job Applicants V Ir | iterviews V Credentiais V Placement | S V Setup        |
| Dashboard<br>Recruitment Dashboard<br>A Last refreshed 22 days ago. Refresh this dashboar<br>As of Jan 12, 2022 1:27 PM-Viewing as Matt Damon | Open Refresh Subs                                                   | welcome to TargetRecruit, L         | LC Service Setup |
|                                                                                                                                               |                                                                     | Today's Tasks                       |                  |
| Accounts with Job Stage 50                                                                                                                    | New Jobs Created by Recruiter 5 Applicants by Stage                 | 55                                  | Edit Page        |
| Record Count<br>0 7 14 21<br>- 12 21                                                                                                          | Record Count Phil Gugliotta  Unathan Wa                             | 200<br>193                          |                  |

• Search for "Apex Jobs" in the search field on the left. Select Apex Jobs from the result.

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 Verify that all batch processes are in "Completed" status. Otherwise, the configuration cannot move forward.

Click here to go to the new batch jobs page

#### Apex Jobs

Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.

View: Today 

Edit | Create New View

| Action | Submitted Date +      | Job Typ | Status    | Status Detail                                                                                                                    | <b>Total Batches</b> | <b>Batches Processed</b> | Failures | Submitted By      | <b>Completion Date</b> | Apex Class            | Apex Method                  |
|--------|-----------------------|---------|-----------|----------------------------------------------------------------------------------------------------------------------------------|----------------------|--------------------------|----------|-------------------|------------------------|-----------------------|------------------------------|
|        | 1/28/2022, 6:02<br>AM | Future  | Completed |                                                                                                                                  | 0                    | 0                        | (        | Baker,<br>William | 1/28/2022, 6:02<br>AM  | CandidateSearchHelper | updateSearchFuture           |
|        | 1/28/2022, 6:02<br>AM | Future  | Completed |                                                                                                                                  | 0                    | 0                        | 0        | Baker,<br>William | 1/28/2022, 6:02<br>AM  | CandidateSearchHelper | updateSearchFuture           |
|        | 1/28/2022, 6:02<br>AM | Future  | Completed |                                                                                                                                  | 0                    | 0                        | 0        | Baker,<br>William | 1/28/2022, 6:02<br>AM  | CandidateSearchHelper | updateSearchFuture           |
|        | 1/28/2022, 6:02<br>AM | Future  | Completed |                                                                                                                                  | 0                    | 0                        | (        | Baker,<br>William | 1/28/2022, 6:02<br>AM  | CandidateSearchHelper | updateSearchFuture           |
|        | 1/28/2022, 6:02<br>AM | Future  | Completed |                                                                                                                                  | 0                    | 0                        | (        | Baker.<br>William | 1/28/2022, 6:02<br>AM  | CandidateSearchHelper | updateSearchFuture           |
|        | 1/28/2022, 6:02<br>AM | Future  | Failed    | Record<br>Currently<br>Unavailable:<br>The record<br>you are<br>attempting<br>to edit, or<br>one of its<br>related<br>records is | 0                    | 0                        |          | Baker.<br>William | 1/28/2022, 6:02<br>AM  | Geocoding_Util        | Geocode_AccountOrContact_Asy |



## **Migrate Existing Searches**

• Go back to **Setup** in Admin Tools.

| '<br>View Report (My Open Jobs By Account) | '<br>View Report (All HotBooks) | View Report (Active Placements by Account) | Candidate search<br>Select Filter Fields |
|--------------------------------------------|---------------------------------|--------------------------------------------|------------------------------------------|
| Job Applicants By Account                  | Interviews By Job               | Roll Offs By Account                       | TargetRecruit AdminTools                 |
| Record Count<br>0 20к 40к                  | Record Count                    | 1                                          | Setup                                    |

 Click Candidate Search, then Migrate to New Search. This brings existing saved candidate searches from the previous version over to the new interface.

| onfig<br>Config | gurat   | tion Set       | up          |                  |          |            |       |              |       |                 |  |
|-----------------|---------|----------------|-------------|------------------|----------|------------|-------|--------------|-------|-----------------|--|
| lick the        | Setup b | outton to conf | igure:      |                  |          |            |       |              |       |                 |  |
| Setup           | Job     | Candidate      | Desume Pool | Candidate Search | Hotbooks | Job Search | Shift | Integrations | Files | Course Teaching |  |

# Define Objects to Appear in Query Builder and Refine By

• In Setup, search for Custom Metadata Types. Click the link when it appears in the results.



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• Click Search Default Related List.

|                          | Q Search Setup                                                                                                                                                          |                                                                                           |                          |            | ×                                                    |                          | 🏟 🌲 🍪               |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------|------------|------------------------------------------------------|--------------------------|---------------------|
| Setup Home Object        | t Manager ∨                                                                                                                                                             |                                                                                           |                          |            |                                                      |                          |                     |
| Q custom meta            | SETUP<br>Custom Metadata Types                                                                                                                                          |                                                                                           |                          |            |                                                      |                          |                     |
| ✓ Custom Code            |                                                                                                                                                                         |                                                                                           |                          |            |                                                      |                          |                     |
| Custom Metadata Types    | All Custom Metadata Types                                                                                                                                               |                                                                                           |                          |            |                                                      | He                       | alp for this Page 🥝 |
| Try using Global Search. | environment to another, or packaged and installed.<br>Rather than building apps from data records in custom ob<br>and upgrade. Querying custom metadata records doesn't | bjects or custom settings, you car<br>t count against SOQL limits.<br>New Custom Metadata | n create custom metadata | types and  | I add metadata records, with all the manageability t | hat comes with metadata: | package, deploy,    |
|                          | Action Label                                                                                                                                                            | Installed Package                                                                         | Namespace Prefix V       | /isibility | API Name                                             | Record Size              | Description         |
|                          | Manage Records 📥 Charge Group Mapping                                                                                                                                   | Isimio Staffing                                                                           | kruvi_staff F            | Public     | kruvi_staffField_Suggestionmdt                       | 906                      |                     |
|                          | Manage Records 📥 Country Code                                                                                                                                           | TargetRecruit Managed                                                                     | AVTRRT F                 | Public     | AVTRRTCountry_Codemdt                                | 396                      |                     |
|                          | Manage Records 📥 Isimio Mobile App Features                                                                                                                             | Isimio Mobile                                                                             | kruvi_mobile F           | Public     | kruvi_mobileApp_Featuremdt                           | 396                      |                     |
|                          | Manage Records 📥 Plugin                                                                                                                                                 | Isimio                                                                                    | kruvi F                  | oublic     | kruviPluginmdt                                       | 1209                     |                     |
|                          | Manage Records 📥 Quick Review Default Related List                                                                                                                      | TargetRecruit Managed                                                                     | AVTRRT F                 | oublic     | AVTRRT_Quick_Review_Default_Related_List_mdt         | 406                      |                     |
|                          | Manage Records 📥 Search Default Related List                                                                                                                            | TargetRecruit Managed                                                                     | AVTRRT F                 | Public     | AVTRRT_Search_Default_Related_Listmdt                | 679                      |                     |
|                          | Manage Records 📥 Sharing Record Notification                                                                                                                            | TargetRecruit Managed                                                                     | AVTRRT F                 | oublic     | AVTRRT_Sharing_Record_Notifications_mdt              | 541                      |                     |
|                          | Manage Records 📥 Sharing record Notificiation                                                                                                                           | TargetRecruit Managed                                                                     | AVTRRT F                 | Public     | AVTRRT_Sharing_record_Notficiations_mdt              | 541                      |                     |
|                          |                                                                                                                                                                         |                                                                                           |                          |            |                                                      |                          |                     |

• Click Manage Search Default Related Lists.

|                                      | ٩                                              | Search Setup                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                      | * •                              | ) 🗄 🚓 ? 🌣 🌲 🤇               |    |
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| Setup Home Object                    | Nanager 🗸                                      |                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                      |                                  |                             |    |
| Q custom meta                        | Custom Metadat                                 | ta Types                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                      |                                  |                             |    |
| ✓ Custom Code                        |                                                |                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                      |                                  |                             |    |
| <mark>Custom Meta</mark> data Types  | Custom Metadata Type<br>Search Default Related | List (Managed)                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                      |                                  | Help for this Page 🔞        |    |
| Didn't find what you're looking for? | This custom metadata type is m                 | anaged. You can only edit certain attribut | es Display More Information                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                      |                                  |                             |    |
| Try using Global Search.             |                                                | unugea, roa can only can contain attribut  | Contraction and the second sec |                      |                                  |                             |    |
|                                      |                                                | Sta                                        | ndard Fields (6)   Custom Fields (4)   Validation Rules (0)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Page Layouts [1]     |                                  |                             |    |
|                                      | Custom Metadata Type Detail                    | Edit                                       | lanage Search Default Related Lists                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                      |                                  |                             |    |
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|                                      | Object Name                                    | Search_Default_Related_List                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Protection Level     |                                  |                             |    |
|                                      | Namespace Prefix                               | AVTRRT                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Record Size          | 679                              |                             |    |
|                                      | API Name                                       | AVTRRT_Search_Default_Related_L            | istmdt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                      |                                  |                             |    |
|                                      | Created By                                     | Jack Stone, 27/01/2022 06:29               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Modified By          | Jack Stone, 27/01/2022 06:29     |                             | 11 |
|                                      | Package Information                            |                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                      |                                  |                             |    |
|                                      | Installed Package                              | TargetRecruit Managed                      | A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | vailable in Versions | 6.180 - Current                  |                             | Ш  |
|                                      | Standard Fields                                |                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                      |                                  |                             |    |
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|                                      | Edit Custom Metadata Record Nam                | 2                                          | DeveloperName                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                      | Text(40)                         |                             |    |
|                                      | Edit Label                                     |                                            | MasterLabel                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                      | Text(40)                         |                             |    |
|                                      | Last Modified By                               |                                            | LastModifiedBy                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                      | Lookup(User)                     |                             |    |
|                                      | Edit Namespace Prefix                          |                                            | NamespacePrefix                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                      | Text                             |                             |    |
|                                      | Edit Protected Component                       |                                            | IsProtected                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                      | Checkbox                         |                             |    |
|                                      | Custom Fields                                  | New                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                      |                                  |                             | -  |
|                                      | Action Field Label                             | API Name                                   | Installed Package Data Type                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Field Manage         | ability Indexed Controlling Fiel | d Modified By               |    |
|                                      | Edit 📥 Active                                  | AVTRRT Active c                            | TargetRecruit Managed Checkbox                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Subscriber ed        | litable                          | Jack Stone 27/01/2022 06:29 | -  |

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 The following screen is where you define the data fields that appear in the new Query Builder and Refine By functions. The defaults are:



Admins can also add any custom fields the client may need. To hide or display any of these fields, simply use the **Active** column.

| View: |                       | Cruit Managed)   Edit   Create New View |                    |                                 |          |                         |                  |
|-------|-----------------------|-----------------------------------------|--------------------|---------------------------------|----------|-------------------------|------------------|
|       |                       |                                         |                    | New                             | _        | -                       |                  |
| ction | Label 🕈               | Search Default Related List Name        | Search Object Name | Child Relationship Name         | Order Ac | ive Protected Component | Namespace Prefix |
| dit   | Assessments           | Assessments                             | AVTRRT_Search_c    | AVTRRT_CareGiver_Assessments_r  | 6        |                         | AVTRRT           |
| lit   | Background Checks     | Background_Checks                       | AVTRRT_Search_c    | AVTRRT_Back_Ground_Checks_r     | 7        |                         | AVTRRT           |
| lit i | Candidate To Hotbooks | Candidate_to_Hotbook                    | AVTRRT_Search_c    | AVTRRT_Candidates_to_Hotbooks_r | 8        |                         | AVTRRT           |
| lit ( | Competency Details    | Competency_Details                      | AVTRRT_Search_c    | AVTRRT_R00N40000001mChvEAE_r    | 1        |                         | AVTRRT           |
| it i  | Educational History   | Educational_History                     | AVTRRT_Search_c    | AVTRRTR00N40000001m9ShEAIr      | 2        | 1 11                    | AVTRRT           |
| t j   | Employment History    | Employment_History                      | AVTRRT_Search_c    | AVTRRT_R00N40000001m8gGEAQ_r    | 3        | 1 🗆                     | AVTRRT           |
| it j  | Job Applicants        | Job_Applicants                          | AVTRRT_Search_c    | AVTRRTR00N40000001IYXmEAMr      | 4        |                         | AVTRRT           |
| it i  | Placements            | Placements                              | AVTRRT_Search_c    | AVTRRT_Placements1_r            | 5 ,      |                         | AVTRRT           |

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#### Create a New Candidates List Tab in the Job Record

• From any Job record, click the Setup gear icon, then **Edit Page**.

| Image: Targetree CRUIT LI       Home       Clients       Contacts         Image: Job       Job       3699         Image: Mew       Sourcing         Image: Details       Applicants       Interviews         Placements       Information         Job       Title         PCI Level III Quality Control Technician/Inspector- Nationwide (US)       Account         Mountview Partners       Hiring Manager | Jobs V Candidates Search V       | Job Applicants V Interviews V | Credentials V Placements V<br>+ Fo | Setup<br>Setup for current app                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|-------------------------------|------------------------------------|------------------------------------------------|
| Job     3699       New     Sourcing       Details     Applicants     Interviews       Placements       V     Information       Job Title       PCI Level III Quality Control Technician/Inspector- Nationwide (US)       Account       Mountview Partners       Hiring Manager                                                                                                                              | Interviewing                     |                               | + Fo                               | llow te    |
| New     Sourcing       Details     Applicants     Interviews     Placements       Information     Job Title     PCI Level III Quality Control Technician/Inspector- Nationwide (US)     Account       Mountview Partners     Mining Manager                                                                                                                                                                 | Interviewing                     |                               |                                    |                                                |
| Details     Applicants     Interviews     Placements       ✓     Information       Job Title       PCI Level III Quality Control Technician/Inspector- Nationwide (US)       Account       Mountview Partners       Hiring Manager                                                                                                                                                                          |                                  | Closed - Cancelled            | Submit to HR/Recruiter             | Developer Console nplet                        |
|                                                                                                                                                                                                                                                                                                                                                                                                             | Credentials & Shifts Relate      | ed                            | Activity Chatter                   | Edit Page<br>Edit Object                       |
| Job Title PCI Level III Quality Control Technician/Inspector- Nationwide (US) Account Mountview Partners Hiring Manager                                                                                                                                                                                                                                                                                     |                                  |                               | Log a Call Email                   | New Task New Event                             |
| Account Mountview Partners Hiring Manager                                                                                                                                                                                                                                                                                                                                                                   | Stage<br>New                     | /                             | Recap                              | your call Add                                  |
| Hiring Manager                                                                                                                                                                                                                                                                                                                                                                                              | Rating<br>Warm                   | 1                             | F                                  | filters: All time • All activities • All types |
| Bill Belichick                                                                                                                                                                                                                                                                                                                                                                                              | Expected Start Date<br>9/22/2020 | 1                             |                                    | Refresh • Expand All • Vie                     |
| Hiring MGR Email<br>bill.belichick@gmail.com                                                                                                                                                                                                                                                                                                                                                                |                                  | 1                             | ✓ Upcoming & Overdue               |                                                |

• In the editor that displays, click Add Tab, then provide the custom label "Candidate List".

| ← 📅 Lightning App Builder 📑 Pages | 5 ✔ Job Record Page                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                 |                                                           |                                                 | ? нер                       |
|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|-------------------------------------------------|-----------------------------|
| 5 0 % 0 0                         | 🖵 Desktop 🔹 Shrin                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | nk To View 🔻 C <sup>4</sup>                                                                                                     |                                                           |                                                 | Analyze 🛕 Activation Save   |
| Components Fields                 | ▲ 404                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                 |                                                           | + folicer Edit OungeOwner Doos +                | Page > Tabs                 |
| Q search 🙆 🕸 -                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                 |                                                           |                                                 | Default Tab                 |
|                                   | Related Details Canoidate List D                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | etan                                                                                                                            |                                                           | Activity Cruitier                               | Details 🗘                   |
| ✓ Standard (0)                    | lah Num<br>201                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Onner<br>🔁 William Baker                                                                                                        |                                                           | Log a Call                                      | Tabs                        |
|                                   | Salechorce QA Engineer available in Austin<br>Account<br>Account                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Job 404 Salesforce QA Engineer a<br>Steps                                                                                       | evalable in Austro                                        | Nop your call.                                  | ≡ Related ×                 |
| ✓ Custom (0)                      | Hong Manager<br>Devict Smith                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Estimated Close Date                                                                                                            |                                                           | Ritors: All terms + All activities + All types: | $\equiv$ Details $\times$   |
|                                   | C without Baker                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | - D                                                                                                                             |                                                           | ✓ Upcoming & Overdue                            |                             |
| Custom - Managed (2)              | All                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Publish @                                                                                                                       | 2                                                         | No neit steps.                                  | ≡ Candidate List ×          |
|                                   | Account Manager                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Job Contact Small                                                                                                               |                                                           |                                                 |                             |
| CandidateSearchContainer          | Ark Category<br>Information Technology                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | ante Publish Sales<br>Default: Marketing: Sales                                                                                 | Tab Label                                                 | 0                                               | ≡ <u>Details</u> ×          |
| J Hotbook Search                  | and Sada                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Balling                                                                                                                         | Custom                                                    | :                                               |                             |
|                                   | Jule Country                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Anto Publish Teng URL                                                                                                           | * Custom Labol                                            |                                                 | Add Tab                     |
|                                   | US<br>Jate Inco                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Interpret/100eco.co/36249609<br>Job Publish Site (Seet)                                                                         | Custom caper                                              | Ţ                                               |                             |
|                                   | Permanent<br>Bill Reie Fange                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Default;Marketing;Sales                                                                                                         | Can                                                       | 1                                               | V. Sat Component Viribility |
|                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | https://dores.co/BAnJoZR                                                                                                        | This field is require                                     | ed.                                             | Set component visibility    |
|                                   | AB SUIT LU                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Contentant report on.                                                                                                           |                                                           |                                                 | Filters                     |
|                                   | Paulty All Version                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Broadcast URL                                                                                                                   |                                                           |                                                 | L Add Silter                |
| Gat more on the AppEvchange       | Katily Al Benaders                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | anti Application UNL<br>http://trialdemeniate.torce.com/PC<br>page=intiApplication/Page&inti-17<br>Candidate.torce.adk.1000005b | MS_CMSLayout?<br>http://www.salesting.fallestig=<br>state |                                                 | + Add Hiter                 |
| Waiting for triisi                | their Control of Contr | and Publish SH<br>Mines (There while an arking over the                                                                         | (Best of                                                  | Φ                                               | Tips 🖪 📃 🗶                  |

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 A blank tab with the label "Candidate List" will appear on the object. Click the tab, then search for "CandidateSearchContainer" in the left pane. When found, click and drag the container over to your new, blank tab. Click Save.



#### **Redirect Search Candidates Button on Job Object**

• From any Job object, click **Edit Object** in the Setup pane.

| TARGET <b>RECRUIT</b>                        |                      | All 🔻           | Q Search                      |                 |                  |              |                 |             | ★ - 日 ⊕ ? \$                        | ŧ 🐥     |
|----------------------------------------------|----------------------|-----------------|-------------------------------|-----------------|------------------|--------------|-----------------|-------------|-------------------------------------|---------|
| TARGETRECRUIT LI                             | Home Client          | ts 🗸 Contacts 🚿 | 🗸 Jobs 🧹 Candidate            | es Search 🗸 Job | Applicants 🗸 Int | terviews 🗸 🤇 | Tredentials 🗸 F | lacements 🗸 | Setup                               | ~       |
| Job<br>3699                                  |                      |                 |                               |                 |                  |              |                 | + Follow    | Service Setup                       | ıe      |
| New                                          |                      | Sourcing        | Intervi                       | ewing           | Closed - Can     | celled       | Submit to HF    | t/Recruiter | Developer Console                   | npl     |
| etails Applicants                            | Interviews           | Placements      | Credentials & Shifts          | Related         |                  |              | Activity        | Chatter     | Edit Page<br>Edit Object            |         |
| Information                                  |                      |                 |                               |                 |                  |              | Log a Call      | Email       | New Task New Event                  |         |
| b Title<br>CI Level III Quality Control Tech | nician/Inspector- Na | ationwide (US)  | Stage<br>New                  |                 |                  | 1            |                 | Recap you   | ır call                             | Ac      |
| ccount<br>Iountview Partners                 |                      | 1               | Rating<br>Warm                |                 |                  | 1            |                 | Filte       | rs: All time • All activities • All | types   |
| liring Manager<br>ill Belichick              |                      | 1               | Expected Start Date 9/22/2020 |                 |                  | 1            |                 |             | Refresh • Expand                    | All • \ |
| iring MGR Email                              |                      | /               | Expected End Date             |                 |                  | 1            | ✓ Upcoming      | & Overdue   |                                     |         |

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• In the left pane, click **Page Layouts**. Click whichever layout the client is currently using.

| <b>*</b>                                              | Q Search Setup                                       |                                  | EPT: 1 5 464.39 KB 🖈 💌 🖶 🚳 ? 🕸     | : 🌲 🐻      |
|-------------------------------------------------------|------------------------------------------------------|----------------------------------|------------------------------------|------------|
| Setup Home Obje                                       | ect Manager 🗸                                        |                                  |                                    |            |
| SETUP > OBJECT MANAGER<br>Job                         |                                                      |                                  |                                    |            |
| Details                                               | Page Layouts     3 Items, Sorted by Page Layout Name |                                  | Q, Quick Find New Page Layout /    | Assignment |
| Fields & Relationships                                | PAGE LAYOUT NAME                                     | CREATED BY                       | MODIFIED BY                        |            |
| Page Layouts                                          | Corporate Job Layout                                 | William Baker, 9/3/2019, 6:00 AM | William Baker, 1/21/2022, 8:39 AM  | •          |
| Lightning Record Pages<br>Buttons, Links, and Actions | Job Listing                                          | William Baker, 9/3/2019, 6:01 AM | William Baker, 10/22/2020, 4:19 AM | •          |
| Compact Layouts                                       | Staffing Job Layout                                  | William Baker, 9/3/2019, 6:01 AM | William Baker, 1/21/2022, 8:19 AM  |            |
| Field Sets                                            |                                                      |                                  |                                    |            |
| Object Limits                                         |                                                      |                                  |                                    |            |
| Record Types                                          |                                                      |                                  |                                    |            |
| Related Lookup Filters                                | •                                                    |                                  |                                    |            |

Click Mobile & Lightning Actions. Search for "Search Candidates". There should now be two options. The one that navigates to the new Candidates Search has the name "AVTRRT\_Search\_Candidates\_New". Replace the old with the new by dragging and dropping.

| <b>*</b>                          | Q. Search Setup EPT: 7.75 464.39 KB 🖈 💌 🕂 🚓 ? 🔅 🐥                                                                                                                                                                                                                                                                                |   |
|-----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|
| Setup Home Object M               | anager 🗸                                                                                                                                                                                                                                                                                                                         | - |
| SETUP > OBJECT MANAGER            |                                                                                                                                                                                                                                                                                                                                  |   |
|                                   | Save V Quick Save Preview As V Cancel O Undo A Redo E Layout Properties                                                                                                                                                                                                                                                          | • |
| Details<br>Fields & Relationships | Fields     Quick Find     sea       Buttons     Job Board Search       Custom Links     Search Candidates                                                                                                                                                                                                                        | I |
| Page Layouts                      | Mobile & Lightning<br>Actions Search Candique Action Type: Custom Button<br>This len is currently in use (click to locate)                                                                                                                                                                                                       |   |
| Lightning Record Pages            | Related Lists                                                                                                                                                                                                                                                                                                                    |   |
| Buttons, Links, and Actions       |                                                                                                                                                                                                                                                                                                                                  |   |
| Compact Layouts                   | Salesforce Mobile and Lightning Experience                                                                                                                                                                                                                                                                                       |   |
| Field Sets                        | Actions                                                                                                                                                                                                                                                                                                                          |   |
| Object Limits                     | Post         File         Link         Poll         Edit         Change Owner         Clone         Change Record Type         Delete         Sharing           Search Candidates         Show Interviews         Checklist         Questionnaire         Clone with Questions         Set Extrafields         Create Deal Sheet |   |
| Record Types                      | Job Board Search Clone With Job Applicants Interview Feedback Questionnaire Log a Call Submit Candidates Broadcast                                                                                                                                                                                                               |   |
| Related Lookup Filters 🔹          | Question Search Candidates                                                                                                                                                                                                                                                                                                       |   |

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# Add Ability to Configure Automatch Fields from the Home Page

From the TargetRecruit Home page, click the Setup gear icon > Setup > search for Custom Settings > click
 Custom Settings. Scroll until you can click Home Page Components.

| -                                               | Q Search Setup                               |                         |                                                           | EPT: 3.41 s 462.65 KB 🖈 👻 🕂 🚓 | ? 🌣 🌲 🔇 | 0    |
|-------------------------------------------------|----------------------------------------------|-------------------------|-----------------------------------------------------------|-------------------------------|---------|------|
| Setup Home Object Ma                            | anager 🗸                                     | and a standard to be at | 111-5-1-1-1-1-1-1-1111                                    |                               |         |      |
| Q Quick Find                                    | SETUP<br>Custom Settings                     |                         |                                                           |                               |         |      |
| Service Setup Assistant                         |                                              |                         |                                                           |                               |         | -    |
| Service Setup Assistant                         | Manage                                       | Public List             | AVTRRT                                                    | 1.375 0                       | 0       | -    |
| Multi-Factor Authentication Assistant           | Manage EmailBodyParserObjectMapping          | Public List             | AVTRRT                                                    | 865 0                         | 0       |      |
| Release Updates                                 | Manage A EmailBodyParserSettings             | Public Hierarchy        | AVTRRT                                                    | 865 0                         | 0       |      |
| Lightning Experience Transition                 | Manage 📥 Employment Credentials              | Public List             | AVTRRT                                                    | 355 0                         | 0       |      |
| Assistant                                       | Manage Employment Search Fields              | Public List             | AVTRRT                                                    | 118 4                         | 472     |      |
| New Salesforce Mobile App QuickStart            | Manage 📥 Etc to Contact Value                | Public List             | AVTRRT                                                    | 648 8                         | 5184    |      |
| Lightning Usage                                 | Manage 📩 HaleyMarketing Xml Feed Mapping     | Public List             | AVTRRT                                                    | 250 14                        | 3500    | н. I |
|                                                 | Manage 📥 Heat Map                            | Public List             | AVTRRT                                                    | 628 6                         | 3768    |      |
| Optimizer                                       | Manage 1 Home Page Components                | Public List             | AVTRRT                                                    | 573 7                         | 4011    |      |
| Manage Subscription                             | Manage 🏄 HomePageComponent                   | Public Hierarchy        | AVTRRT                                                    | 140 1                         | 140     |      |
| ADMINISTRATION                                  | Manage 📥 Intermediate Pages                  | Public List             | AVTRRT                                                    | 628 74                        | 46472   |      |
|                                                 | Manage Antonia Interview Feedback Default    | Public List             | AVTRRT                                                    | 883 3                         | 2649    |      |
| > Users                                         | Manage 🛃 Licence Credentials                 | Public List             | AVTRRT                                                    | 355 0                         | 0       |      |
| > Data                                          | Manage 📥 Logger                              | Public List             | AVTRRT                                                    | 395 0                         | 0       |      |
| iavascrintsrcl.ln/%27%2Esetun%2Eui%2ElistCustor | mSettinosData.anevn%3Fid%3Da0e%26isdtn%3Do1% | 27).                    | 1999 1999 19 20 30 19 19 19 19 19 19 19 19 19 19 19 19 19 |                               |         | 1    |

Click New. Add a new entry that matches the link below. Pay particular attention to the link address, which should be "/apex/AVTRRT\_SelectFilterFields".

|                                              | Q Sear                                             | h Setup                                                  |                                             | BPT: 1.55 462.65 KB 🖈 💌 🖶 🚓 ? 🕸 🌲 🐻                                                                                    |
|----------------------------------------------|----------------------------------------------------|----------------------------------------------------------|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| Setup Home Object M                          | anager 🗸                                           | 1117- Sec. 1946-1                                        | 1000 - 10000 - 1 1                          |                                                                                                                        |
| Q Quick Find                                 | SETUP                                              |                                                          |                                             |                                                                                                                        |
| Setup Home                                   | Custor                                             | n Settings                                               |                                             |                                                                                                                        |
| Service Setup Assistant                      |                                                    |                                                          |                                             |                                                                                                                        |
| Multi-Factor Authentication Assistant        | If the custom setting is<br>running the app, a spe | a hierarchy, you can ado<br>cific profile, or just a gen | d data for the user, profile,<br>eral user. | , or organization level. For example, you may want different values to display depending on whether a specific user is |
| Release Updates                              | View: All V Edit                                   | Create New View                                          |                                             |                                                                                                                        |
| Lightning Experience Transition<br>Assistant |                                                    |                                                          |                                             | New         New                                                                                                        |
| New Salesforce Mobile App QuickStart         | Action Name +                                      | Section Name                                             | Order Link Label                            | Link URL                                                                                                               |
| Lightning Usage                              | Edit   Del 15790871                                | 0593 TargetRecruit<br>Tools                              | 3 Add Resume<br>D&D                         | /apex/AddResumeLwc                                                                                                     |
| Optimizer                                    | Edit   Del Add Bulk r                              | TargetRecruit<br>Tools                                   | 2 Add Bulk resume                           | https://trilsidemo.lightning.force.com/apex/AVTRRT_AddResumeBulk                                                       |
| Manage Subscription                          | Edit   Del Add Result                              | TargetRecruit<br>Tools                                   | 1 Add Resume                                | /apex/AVTRRTAddResume                                                                                                  |
| Manage subscription                          | Edit   Del Candidate                               | Portal All Portal Links                                  | 1 Candidate Portal                          | https://trlisidemosite.secure.force.com/FCMS_CMSLayout?page=JobListPage&jobSite=Default&p=Candidate&source=            |
| ADMINISTRATION                               | Edit   Del Client Port                             | All Portal Links                                         | 2 Client Portal                             | https://trlisidemosite.secure.force.com/FCMSCMSLayout?jobSite=Default&p=Client+Profile&page=CMSSiteLogin               |
| > Users                                      | Edit   Del LinkedIN                                | All Portal Links                                         | 6 LinkedIN                                  | https://triisidemosite.secure.force.com/FCMSCMSLayout?<br>page=JobListPage&igbSite=Default&g=Candidate&source=LinkedIn |
| > Data                                       | Edit   Del Select Filte                            | Candidate search                                         | 4 Select Filter                             | /apex/AVTRRT_SelectFilterFields                                                                                        |
| > Email +                                    |                                                    |                                                          |                                             |                                                                                                                        |

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You have now created a Select Filter Fields link on the home page. Clicking it brings you to a legacy screen where you can define which fields the system considers for auto-matching and in what priority.



|   | Please Select Filter Fields For AutoMatch |           |   |       |      |        |
|---|-------------------------------------------|-----------|---|-------|------|--------|
|   | ₽                                         |           |   |       |      |        |
|   |                                           |           |   |       | Save | Cancel |
|   | CANDIDATE FIELD                           | JOB FIELD |   | ORDER |      |        |
|   | Account #                                 |           |   |       |      |        |
|   | Account # (other)                         |           |   |       |      |        |
|   | Account ID                                |           |   |       |      |        |
| ~ | Account Name                              | None      | ~ | -153  |      |        |
|   | Accounting Id                             |           |   |       |      |        |
|   | Add Employee in the Payroll               |           |   |       |      |        |
|   | Amount                                    |           |   |       |      |        |
|   | Assistant's Name                          |           |   |       |      |        |
|   | Asst. Phone                               |           |   |       |      |        |
|   | Automated PayPackage Email Sent           |           |   |       |      |        |
| ~ | Availability To Interview                 | None      | ~ | -148  |      |        |
|   | Available To Start                        |           |   |       |      |        |
|   | Background Check                          |           |   |       |      |        |
|   | Bank Account Type                         |           |   |       |      |        |
|   | Bank Account Type (other)                 |           |   |       |      |        |
| _ |                                           |           |   |       |      |        |



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#### Set Search Results to Sort by Keyword Count

• Setup > Custom Settings > then find and click on Manage for Config Settings.

|                                      |                     | Q Search Setup                    |        |           |                | 💌 🗄 🏟 ? 🌣 🖡 🍪            |
|--------------------------------------|---------------------|-----------------------------------|--------|-----------|----------------|--------------------------|
| Setup Home Object N                  | Aanager 🗸           |                                   |        |           |                |                          |
| Q custom settings                    | Custom Sett         | ings                              |        |           |                |                          |
|                                      |                     | Additional Buttons for Contact    |        |           |                |                          |
| Custom Settings                      | Manage              | Search                            | Public | List      | AVTRRT         |                          |
| Didn't find what you're looking for? | Manage              | Additional Buttons for Job Search | Public | List      | AVTRRT         |                          |
| Try using Global Search.             | Manage              | 📥 Assignment Rules                | Public | List      | CRDNTLS        |                          |
|                                      | Manage              | Huttons for Job Search            | Public | List      | AVTRRT         |                          |
|                                      | Manage              | 📥 ByPassLogin                     | Public | Hierarchy | FCMS           |                          |
|                                      | Manage              | 📥 <u>Call-Em-All</u>              | Public | Hierarchy | AVTRRT         |                          |
|                                      | Manage              | 📥 <u>Campaign</u>                 | Public | List      | AVTRRT         |                          |
|                                      | Edit   Del   Manage | Candidate Presentation            | Public | Hierarchy |                |                          |
|                                      | Manage              | Andidate Presentation             | Public | Hierarchy | AVTRRT         |                          |
|                                      | Manage              | 📥 Candidate Presentation Ordering | Public | List      | AVTRRT         |                          |
|                                      | Manage              | 📥 Check Print Settings            | Public | List      | TRBOF          | Configure Check Printing |
|                                      | Manage              | ClientPortalCustomSettings        | Public | List      | TRGTFCMS       |                          |
|                                      | Manage              | Competency Search Fields          | Public | List      | AVTRRT         |                          |
|                                      | Manage              | 📥 Config Settings                 | Public | List      | AVTRRT         |                          |
|                                      | Manage              | Config Settings (Hierarchy)       | Public | Hierarchy | AVTRRT         |                          |
|                                      |                     | 📥 Conga Sign Settings             | Public | List      | APXT_CongaSigr | 1                        |
|                                      | Manage              | Lonnector                         | Public | List      | AVTRRT         |                          |
|                                      |                     |                                   |        |           |                |                          |

Navigate to Candidate Search Sorting. Define the value as Keyword\_Count. Now, candidate search results
will default to sorting by the number of keywords the candidate matches from the search parameters.

| -                                     | Q. Search Setup                              |                               |   | EPT: | EPT: 258 s 462.65 KB | EPT: 2.58 s 462.65 KB 🙁 🛨 | EPT: 2.58.5 462.65 KB 🖈 👻 🕂 🚕 | EPT: 2.58.5 462.65 KB 🖈 💌 🕀 🚑 🌻 🌣 |
|---------------------------------------|----------------------------------------------|-------------------------------|---|------|----------------------|---------------------------|-------------------------------|-----------------------------------|
| Setup Home Object M                   | lanager 🗸                                    |                               | í |      |                      |                           |                               |                                   |
| Q. Quick Find                         | SETUP<br>Custom Setting                      | 15                            |   |      |                      |                           |                               |                                   |
| Setup Home                            | custom setting                               | ,-                            |   |      |                      |                           |                               |                                   |
| Service Setup Assistant               | Candidate Account Creation                   |                               |   |      |                      |                           |                               |                                   |
| Multi-Factor Authentication Assistant | Candidate Search Sorting 🤤                   | Keyword_Count                 | 1 |      |                      |                           |                               |                                   |
| Release Updates                       |                                              | · ·                           |   |      |                      |                           |                               |                                   |
| Lightning Experience Transition       | Clone Job Applicants Fields                  |                               |   |      |                      |                           |                               |                                   |
| Assistant                             | Clone Job Stage                              | SendOuts                      |   |      |                      |                           |                               |                                   |
| New Salesforce Mobile App QuickStart  | Clone Job with Job Applicant                 | Interviewing                  |   |      |                      |                           |                               |                                   |
| Lightning Usage                       | Close a Project on Placement<br>Termination  |                               |   |      |                      |                           |                               |                                   |
| Optimizer                             | Delete Event Message                         | Please delete interview multi |   |      |                      |                           |                               |                                   |
| Manage Subscription                   | Disabl Job Stage On Placement ()<br>Creation |                               |   |      |                      |                           |                               |                                   |
| ADMINISTRATION                        | Disable Candidate Search  Keywords Job       |                               |   |      |                      |                           |                               |                                   |
| > Users                               | Disable Candidate Update On<br>JobApplicant  |                               |   |      |                      |                           |                               |                                   |
| > Data                                | Disable Contact Shift Trigger                |                               |   |      |                      |                           |                               |                                   |
| > Email +                             | Appl                                         | U                             |   |      |                      |                           |                               |                                   |

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# **Resume Drag & Drop**

#### **Customize the Fields Available for Data Entry Before Parsing One or a Group of Resumes**

• **Setup > Custom Settings >** find and click **Manage** next to Add Resume Field.

| Custom Set                                                                                                                                                                                                                                                                                      | tings |                                            |            |               |                  |                                                                                                   |  |  |  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|--------------------------------------------|------------|---------------|------------------|---------------------------------------------------------------------------------------------------|--|--|--|
| Custom Settings<br>Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the applicati<br>of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API. |       |                                            |            |               |                  |                                                                                                   |  |  |  |
| View: All                                                                                                                                                                                                                                                                                       |       | Edit   Create New View                     |            |               |                  | Get Usage                                                                                         |  |  |  |
|                                                                                                                                                                                                                                                                                                 |       |                                            |            |               |                  | A   B   C   D   E   F   G   H                                                                     |  |  |  |
| Action                                                                                                                                                                                                                                                                                          |       | Label 1                                    | Visibility | Settings Type | Namespace Prefix | Description                                                                                       |  |  |  |
| Manage                                                                                                                                                                                                                                                                                          | ÷     | Account Fields For Client Edit Page        | Public     | List          | TRGTFCMS         |                                                                                                   |  |  |  |
| Manage                                                                                                                                                                                                                                                                                          | +     | Accounting Settings                        | Public     | Hierarchy     | TRBOF            |                                                                                                   |  |  |  |
| Manage                                                                                                                                                                                                                                                                                          | +     | <u>Act-On</u>                              | Public     | List          | AVTRRT           | Storing hardcoded values for Act-On functionali                                                   |  |  |  |
| Manage                                                                                                                                                                                                                                                                                          | +     | Action Buttons                             | Public     | Hierarchy     | AVTRRT           |                                                                                                   |  |  |  |
| Manage                                                                                                                                                                                                                                                                                          | ł     | Add Resume Field                           | Public     | List          | AVTRRT           | This custom settings is used to create custom fi page. Only fields from the contact objects can b |  |  |  |
| Manage                                                                                                                                                                                                                                                                                          | ł     | Additional Buttons for Candidate<br>Search | Public     | List          | AVTRRT           |                                                                                                   |  |  |  |
| Manage                                                                                                                                                                                                                                                                                          |       | Additional Buttons for Contact             | Public     | l ist         | AV/TRRT          |                                                                                                   |  |  |  |

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• Some fields may already be specified. To add another, click **New.** 

| -                                            | Q. Search Setup                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                             | EPT: 2575 462.65 KB 🖈 👻 🗄 🚓 ? 🌣 🐥 🐻                                                           |
|----------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| Setup Home Object N                          | Manager 🗸                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                             |                                                                                               |
| Q Quick Find                                 | Custom Settings                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                             |                                                                                               |
| Setup Home                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                             |                                                                                               |
| Service Setup Assistant                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                             |                                                                                               |
| Multi-Factor Authentication Assistant        | Add Resume Field                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                             | Help for this Page 🥝                                                                          |
| Release Updates                              | If the custom setting is a list click New to add a new                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | vet of data. For example, if your application had a setting for co          | ountry codes each set might include the country's name and dialing code                       |
| Lightning Experience Transition<br>Assistant | If the custom setting is a hierarchy, you can add data<br>running the app, a specific profile, or just a general u                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | a for the user, profile, or organization level. For example, you ma<br>ser. | y want different values to display depending on whether a specific user is                    |
| New Salesforce Mobile App QuickStart         | View: All Fields                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                             |                                                                                               |
| Lightning Usage                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                             | F   G   H   I   J   K   L   M   N   O   P   Q   R   S   T   U   V   W   X   Y   Z   Other All |
| Optimizer                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | New                                                                         |                                                                                               |
| Manage Subscription                          | Action Name 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Field API Name                                                              | Required Order                                                                                |
| Manage Subscription                          | Edit Del Candidate Summary                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | AVTRRT Candidate Summary c                                                  | 8                                                                                             |
| ADMINISTRATION                               | Edit   Del Email Opt Out                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | HasOptedOutOfEmail                                                          | 10                                                                                            |
| > Users                                      | Edit   Del Recruiter                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | AVTRRT_Recruiter_c                                                          | 3                                                                                             |
| > Data                                       | 1 march 1 marc |                                                                             |                                                                                               |
| > Email 👻                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                             |                                                                                               |

• The fields on the Add Resume Field screen include:

| Name           | The name/label of the field.                                                                         |
|----------------|------------------------------------------------------------------------------------------------------|
| Field API Name | The API name of the field, found in<br>Object Manager.                                               |
| Order          | The order in which the field should display on<br>Resume Drag & Drop, as counted from left to right. |
| Mandatory      | Whether the field should be required in order to parse the resume.                                   |

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| <b>*</b>                                     | Q. Search Setup                                    |                                           | EPT: 1.03 s 462.65 KB ★ 💌 🕂               | a ? \$ # 👼             |
|----------------------------------------------|----------------------------------------------------|-------------------------------------------|-------------------------------------------|------------------------|
| Setup Home Object N                          | Nanager 🗸                                          | 1911 - Marthal Same and March 1990 - Mart | monte and a week and a start of the monte | and a weather that the |
| Q Quick Find                                 | Custom Settings                                    |                                           |                                           |                        |
| Setup Home                                   |                                                    |                                           |                                           |                        |
| Service Setup Assistant                      | the party of the state                             |                                           |                                           | -                      |
| Multi-Factor Authentication Assistant        | Add Resume Field Edit                              |                                           |                                           | Help for this Page 🧐   |
| Release Updates                              | Provide values for the fields you created. This da | ta is cached with the application.        |                                           |                        |
| Lightning Experience Transition<br>Assistant | Edit Add Resume Field                              | Save Save & New Cancel                    |                                           |                        |
| New Salesforce Mobile App QuickStart         | Add Resume Field Information                       |                                           |                                           | = Required Information |
| Lightning Usage                              | Name                                               | i                                         |                                           |                        |
| Optimizer                                    | Field API Name 👳                                   |                                           |                                           |                        |
| Manage Subscription                          | Order @                                            |                                           |                                           |                        |
| ADMINISTRATION                               |                                                    |                                           |                                           |                        |
| > Users                                      |                                                    |                                           |                                           |                        |
| > Data                                       |                                                    |                                           |                                           |                        |
| > Email 👻                                    |                                                    |                                           |                                           |                        |

|                                                       | Q Search Setup               |                 |                                                                                                                                                                                                                                                                                       | *          | 0 🗄 🚓 ? 🍕      | 🛊 🌲 🍪    |
|-------------------------------------------------------|------------------------------|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|----------------|----------|
| Setup Home Object Manager 🗸                           |                              |                 |                                                                                                                                                                                                                                                                                       |            |                |          |
| SETUP<br>Object Manager<br>99+ Items, Sorted by Label |                              |                 | Q Quick Find                                                                                                                                                                                                                                                                          | I          | Schema Builder | Create 🔻 |
| Drip Campaign Applied                                 | Drip_Campaign_Appliedc       | Custom Object   | A contact/lead can have many drip campaigns assigned. The<br>Drip Campaign Applied also is how we STOP a campaign<br>which when checked searches for Scheduled SMS records<br>linked to the Drip Campaign Id (which is a custom field and<br>populated when the campaign is applied). | 07/10/2020 | ~              | •        |
| Drip Campaign Message                                 | Drip_Campaign_Messagec       | Custom Object   | These are the many messages defined for the template. These<br>copy over to the Scheduled SMS related list when the<br>template is chosen.                                                                                                                                            | 07/10/2020 | ~              | •        |
| Duplicate Record Item                                 | DuplicateRecordItem          | Standard Object |                                                                                                                                                                                                                                                                                       |            |                |          |
| Duplicate Record Set                                  | DuplicateRecordSet           | Standard Object |                                                                                                                                                                                                                                                                                       |            |                |          |
| Educational History                                   | AVTRRT_Educational_History_c | Custom Object   | Details of Candidate Education details are stored in this object.                                                                                                                                                                                                                     | 10/01/2019 | ~              | •        |
| Email Message                                         | EmailMessage                 | Standard Object |                                                                                                                                                                                                                                                                                       |            |                |          |
| Employment History                                    | AVTRRT_Employment_History_c  | Custom Object   | Details of Candidates employment history are stored in this object.                                                                                                                                                                                                                   | 27/01/2022 | ~              | •        |
| Engagement Channel Type                               | EngagementChannelType        | Standard Object |                                                                                                                                                                                                                                                                                       |            |                |          |
| Entry                                                 | TRBOF_Entry_c                | Custom Object   |                                                                                                                                                                                                                                                                                       | 09/01/2020 | ~              | •        |
| ETCObject                                             | AVTRRT_ETCObject_c           | Custom Object   | Email to Candidate details are stored in this object.                                                                                                                                                                                                                                 | 10/01/2019 | ~              | -        |
| Event                                                 | Event                        | Standard Object |                                                                                                                                                                                                                                                                                       |            |                |          |
| Expense                                               | AVTRRT_Expense_c             | Custom Object   | Can be used to track expense.                                                                                                                                                                                                                                                         | 10/01/2019 | ~              | •        |
| Expense                                               | TMS_Expense_c                | Custom Object   |                                                                                                                                                                                                                                                                                       | 05/05/2021 | ~              | •        |

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When finished, click **Save.** 

 The custom fields will now appear on the Add Resume Drag & Drop screen in the order you specified from left to right.

| E Add Resume<br>Upload a single resume or bulk of resumes zipped                                                                                                                                                                                                                                          |                           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|
| Options                                                                                                                                                                                                                                                                                                   |                           |
| ✓ Update existing candidate                                                                                                                                                                                                                                                                               |                           |
| Account                                                                                                                                                                                                                                                                                                   |                           |
| CANDIDATE POOL                                                                                                                                                                                                                                                                                            | ×                         |
| Recruiter                                                                                                                                                                                                                                                                                                 | Availability To Interview |
| Search People Q                                                                                                                                                                                                                                                                                           |                           |
| Candidate Summary                                                                                                                                                                                                                                                                                         | Email Opt Out             |
| Recruiter                                                                                                                                                                                                                                                                                                 | Job                       |
| Jack Stone   X                                                                                                                                                                                                                                                                                            | Search Job Q              |
| Drag and drop the resumes to this panel.<br>Note: Please upload only doc, docx, txt, rtf, pdf, html formats.<br>For Bulk Resumes zip format is supported.<br>Do not add any periods, dashes, or characters in the file names for<br>your resumes, else there will be an error in uploading your document. |                           |

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