

Installation Guide

QUOKKA recruitment



2024

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Before reading this manual

The Quokka Recruitment application was developed to support and streamline the recruitment process. It allows creating and publishing job offers as well as efficiently handling candidates applications. This manual contains step by step instructions on how to install the Quokka Recruitment application.

The solution is based on the Salesforce ecosystem, therefore help articles for all the basic functionalities are available on pages such as www.trailhead.com or www.help.salesforce.com.

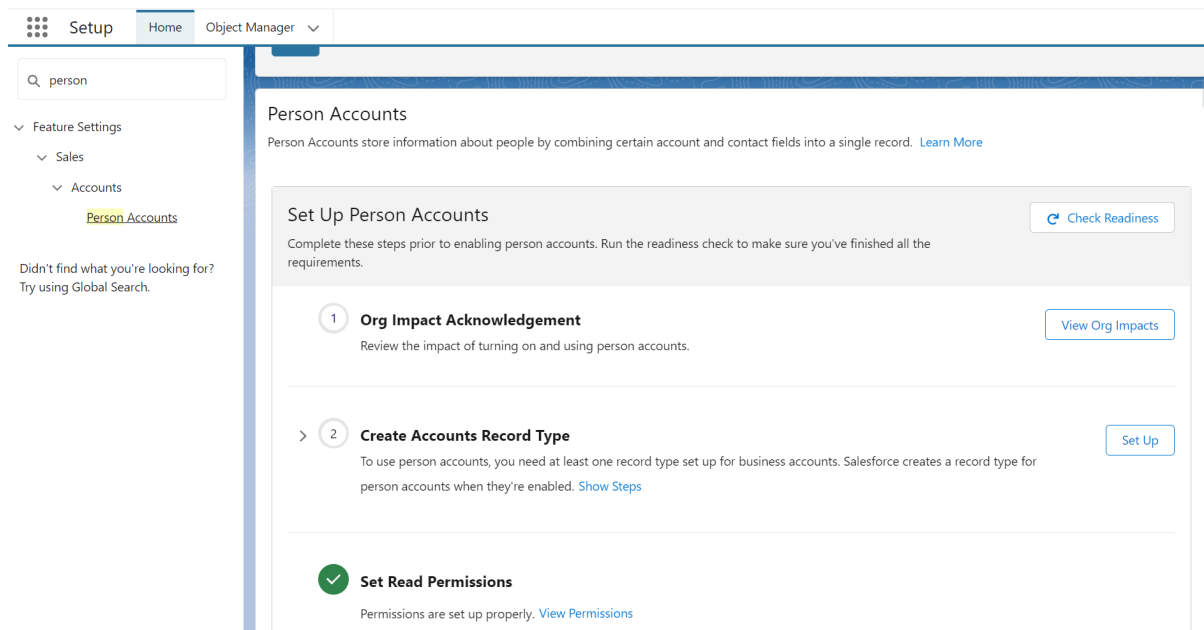


Installation steps

First Step - Org Initial Configuration

Person accounts (If not enabled)

Before the Quokka Recruitment app can be installed, Person Accounts (PA) must be enabled. Each account in Salesforce is recorded as a business account (standard), so to be able to record individuals for recruitment, the Person Accounts feature needs to be enabled.



All four steps must be completed to enable Person Accounts.

After enabling Person Accounts custom layouts may be set up using standard Salesforce options. Furthermore, fields can be hidden or added. The administrator can manage Field Level Security functionality if he deems it necessary.

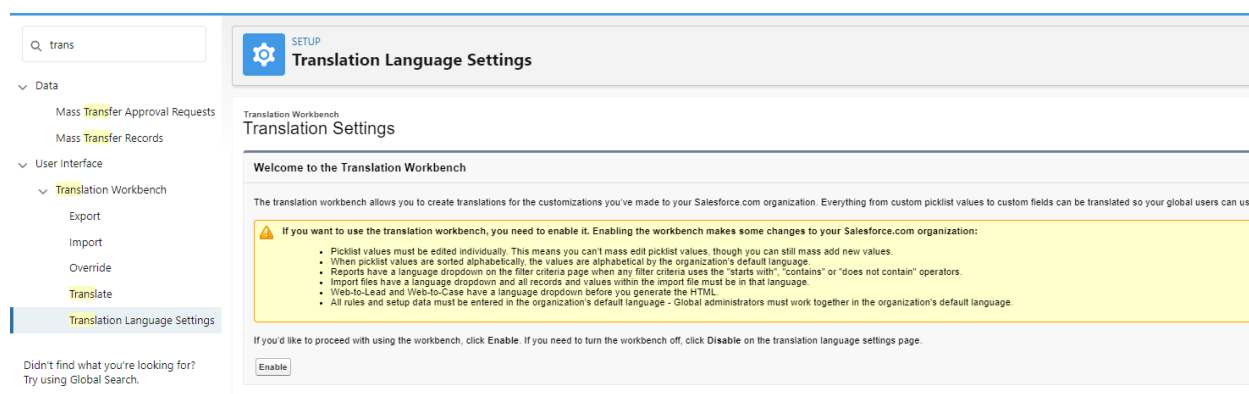
Person Accounts will record individuals (applicants and workers) during the recruitment process.

For more information about Person Accounts check official Salesforce documentation: https://help.salesforce.com/s/articleView?id=sf.account_person.htm&language=en_US&type=5

Enable Translation (If not enabled)

The next step is to enable translation, to do this go to Settings -> Translation language settings and click "Enable", after which a message will be displayed notifying you that translation support has been successfully enabled.



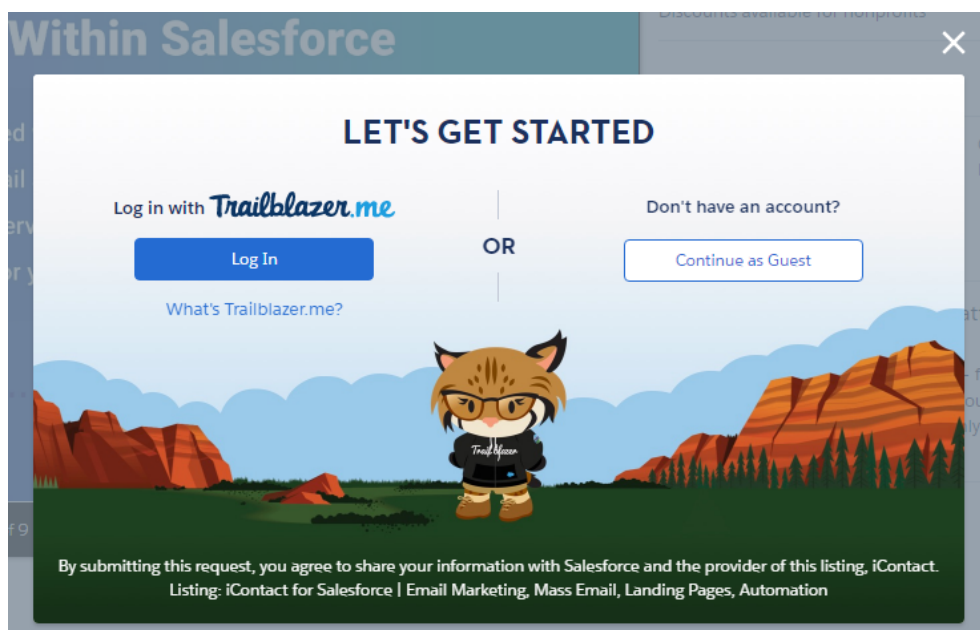


Second Step - Install from Salesforce AppExchange

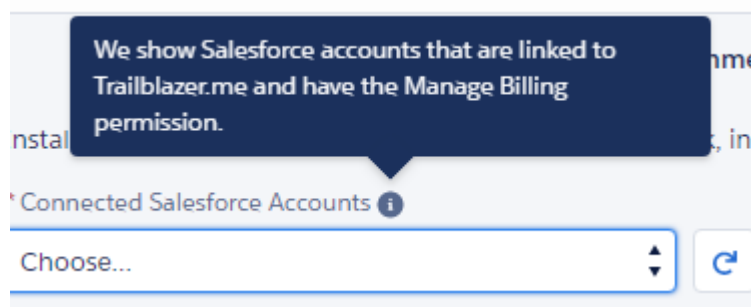
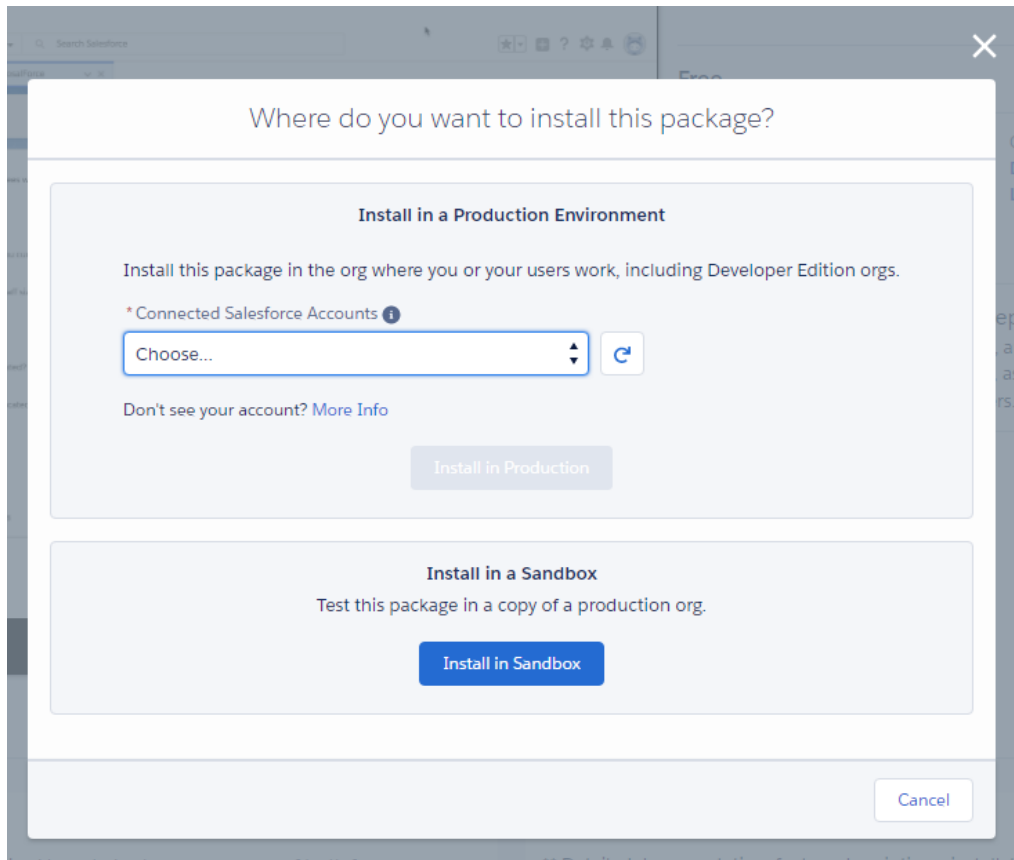
After finding the Quokka Recruitment app on AppExchange (go to <https://appexchange.salesforce.com>), please read the description and get familiar with the price policy and requirements. If your system allows you to install the app, please click the “Get It Now” green button in the upper right corner.

Get It Now

After clicking the button you will be forced to login into your Trailblazer.me account. It is not possible to install the application without a Trailblazer.me account.



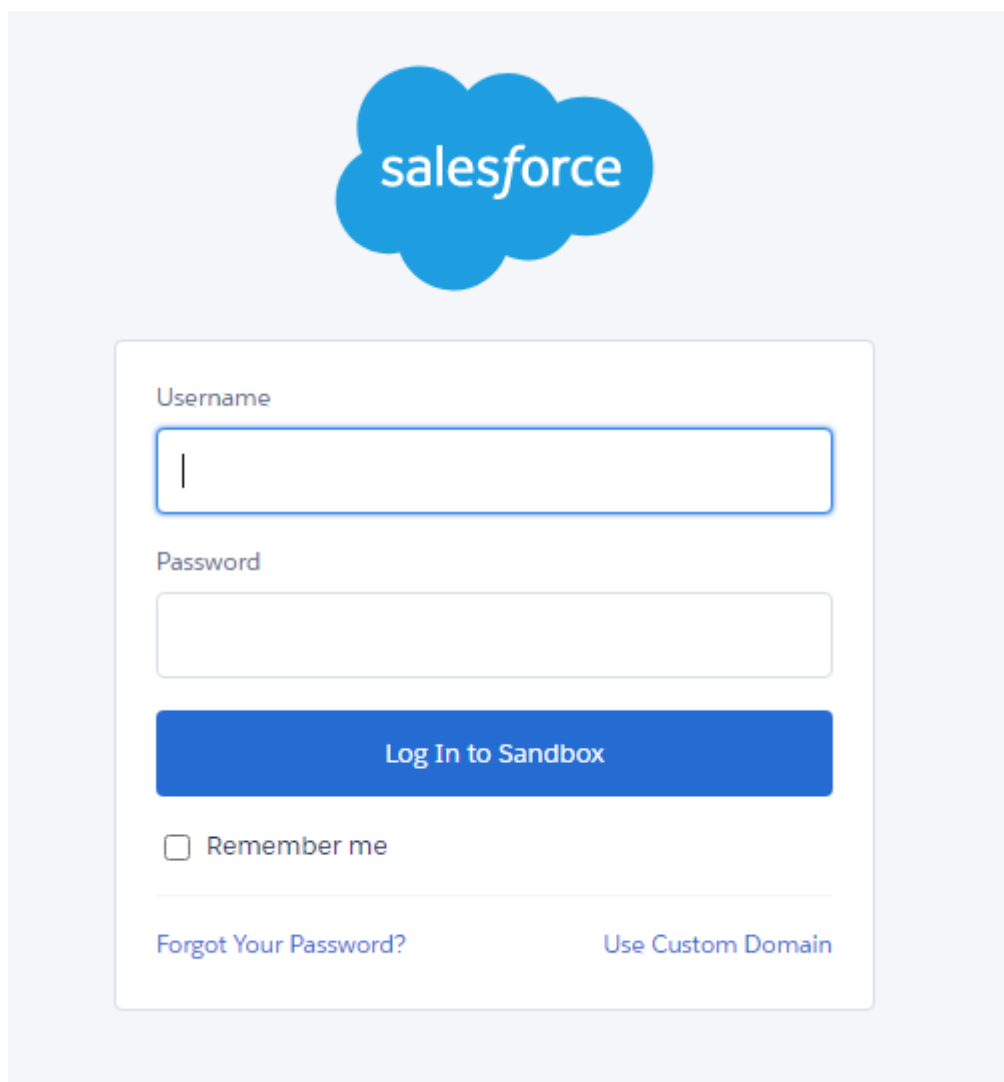
Login into your account. Next, the Installation Wizard will ask you the following question: “Where do you want to install this package?” You have to choose either Production org or Sandbox (we recommend installing in Sandbox copy of your Production org first to test if there are any possible conflicts), but remember - org for the installation must be connected to your Trailblazer.me account ([how to do it?](#)).



Next, read and confirm Installation Details (only if you agree with all the information provided, please read it carefully), press “Install” and voilà! - you are redirected to Salesforce login (either Sandbox or Production, one can find it out by looking into the page web address).

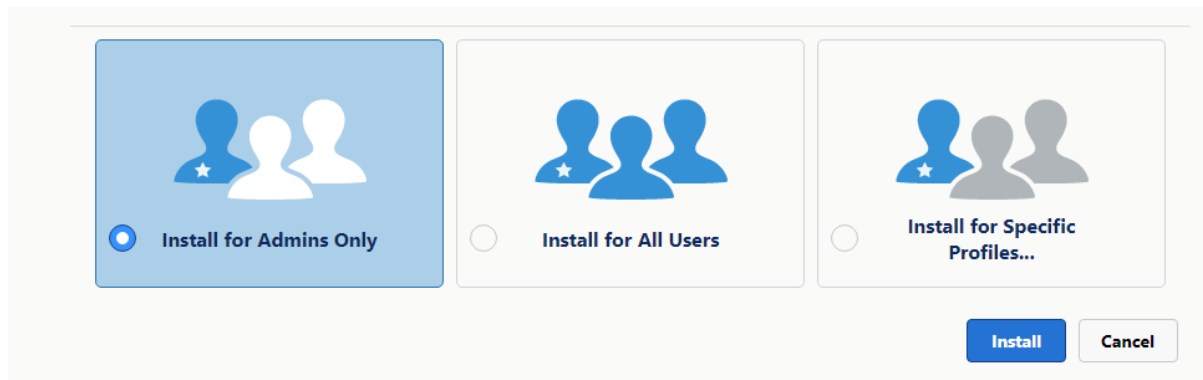
Log into your Sandbox or Production org using the correct credentials.





The image shows the Salesforce login interface. At the top is the Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white lowercase letters. Below the logo is a white login box with a blue border. Inside the box, there are two input fields: "Username" and "Password". The "Username" field has a vertical cursor. Below the "Password" field is a blue button with the text "Log In to Sandbox". Underneath the button is a checkbox labeled "Remember me". At the bottom of the box are two links: "Forgot Your Password?" and "Use Custom Domain".

Finally, you will be redirected to the installation details page. We recommend installing the application for Admins only, so you could assign permissions and privileges to responsible people later.



The image shows the installation options screen. It features three radio button options, each with an icon of three people. The first option, "Install for Admins Only", is selected and highlighted with a blue background. The second option is "Install for All Users", and the third is "Install for Specific Profiles...". At the bottom right are two buttons: "Install" (blue) and "Cancel" (white with blue border).



If you don't know if your org fulfills the requirements or you have other problems, please see the Quokka Recruitment User Manual.

Step Three - Access settings

It is important to understand how the system works to set access for each user. By default, Salesforce users' permissions are generic, i.e.: general permissions, Organization Wide Defaults etc. are set up. There are 4 main types of such permissions:

- Private - user can only see their own records for the object,
- Public Read Only - every user can see all records for the object,
- Public Read/Write - every user can see all records and edit them for the object,
- Public Full Access - user can see and edit all records for the object with additional rights like transfer or/and share.

In standard configuration without any modifications, most of the OWD settings are set to Public Read, so that users can see most of the data, but cannot edit it. The hierarchy is also enabled by standard so that when the appropriate roles are set, users with higher rank positions will have more privileges. Objects like Accounts and Contacts have been set to private because they may contain sensitive data. It is important to set the right sharing rules. One can define rules that give additional users access to records they don't own. More information on this topic can be found in the Salesforce documentation: [Sharing rules](#).

Additionally, three permission sets are included in the package:

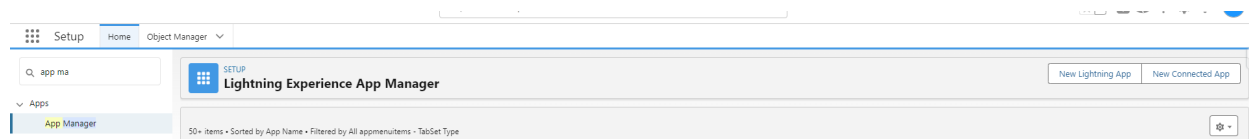
- **Quokka Recruiter Manager Permissions Set** - permission set for Quakker App dedicated to managers
- **Quokka Recruiter Limited Permission Set** - permissions for Recruiters (limited), gives **read, edit** and **create** access to every object related to the application;
- **Quokka Recruiter Admin Permission Set** - permissions for chief recruiters and Admins with **all permission** for Quokka Recruitment app.

Step Four - Create connected App

A connected app is a framework that enables an external application to integrate with Salesforce using APIs and standard protocols, such as SAML, OAuth, and OpenID Connect. Connected apps use these protocols to authenticate, authorize, and provide single sign-on (SSO) for external apps. This application will connect to an external site **quokka.jobs** where job data will be stored.

Go to Setup -> App manager and click on the button "New Connected App".





Fill in the following fields:

- **Connected App Name** - choose a name as you want the connected application to be called (the name does not affect the operation of the application, it can be anything)
- **API Name** - similar to the point above
- **Contact Email** - email to which we will receive all notifications (admin email)

New Connected App

Save Cancel

To publish an app, you need to be using a Developer Edition organization with a namespace prefix chosen.

Basic Information

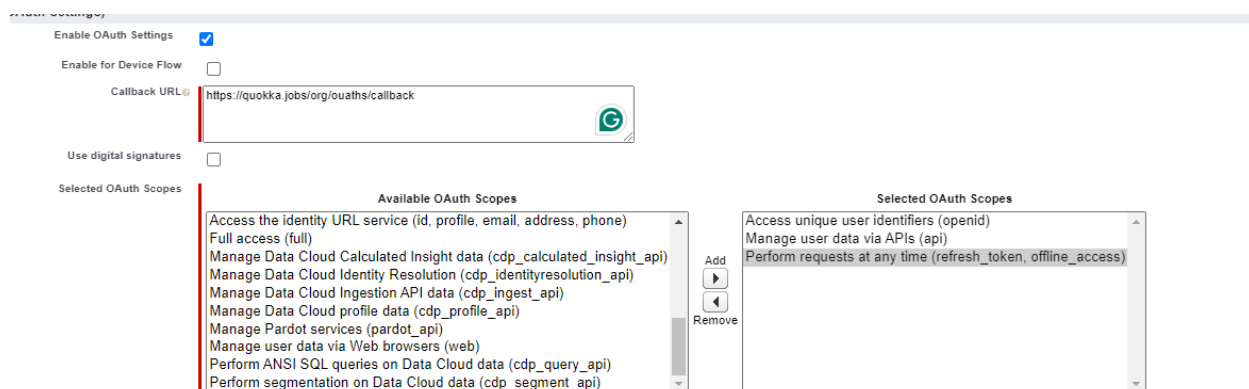
Connected App Name	Quokka Integration
API Name	Quokka_Integration
Contact Email	marek.bartylak@clorce.com
Contact Phone	
Logo Image URL	Upload logo image or Choose one of our sample logos
Icon URL	Choose one of our sample logos
Info URL	
Description	

Next enable OAuth settings and fill Callback URL on site:

<https://quokka.jobs/org/oauth/callback>

Then add three OAuth Scopes:

- Acces unique user identifiers (openid)
- Manage users data via APIs (api)
- Perform requests at any time (refresh_token; offline_access)



The last thing to do here is to uncheck the first two checkboxes ie. **Require Proof Key for**



Code Exchange (PKCE) Extension for Supported Authorization Flows, Require Secret for Web Server Flow, and enable checkbox Enable Client Credentials Flow.

Require Proof Key for Code Exchange (PKCE) Extension for Supported Authorization Flows	☐
Require Secret for Web Server Flow	☐
Require Secret for Refresh Token Flow	☒
Enable Client Credentials Flow	☒
Enable Authorization Code and Credentials Flow	☐
Enable Token Exchange Flow	☐
Enable Refresh Token Rotation	☐
Issue JSON Web Token (JWT)-based access tokens for named users	☐
Introspect All Tokens	☐
Configure ID Token	☐
Enable Asset Tokens	☐
Enable Single Logout	☐

IMPORTANT!

After saving, it will get a message that you need to wait at least 10 minutes, so the next steps in the instructions must be done after waiting this time (message itself disappears after a while).

New Connected App

Changes can take up to 10 minutes to take effect. Deleting a parent org also deletes all connected apps with OAuth settings enabled.

[Continue](#) [Cancel](#)

Next, we need to get consumer key and consumer secret, for this we click on the "Manage Consumer Details" button.

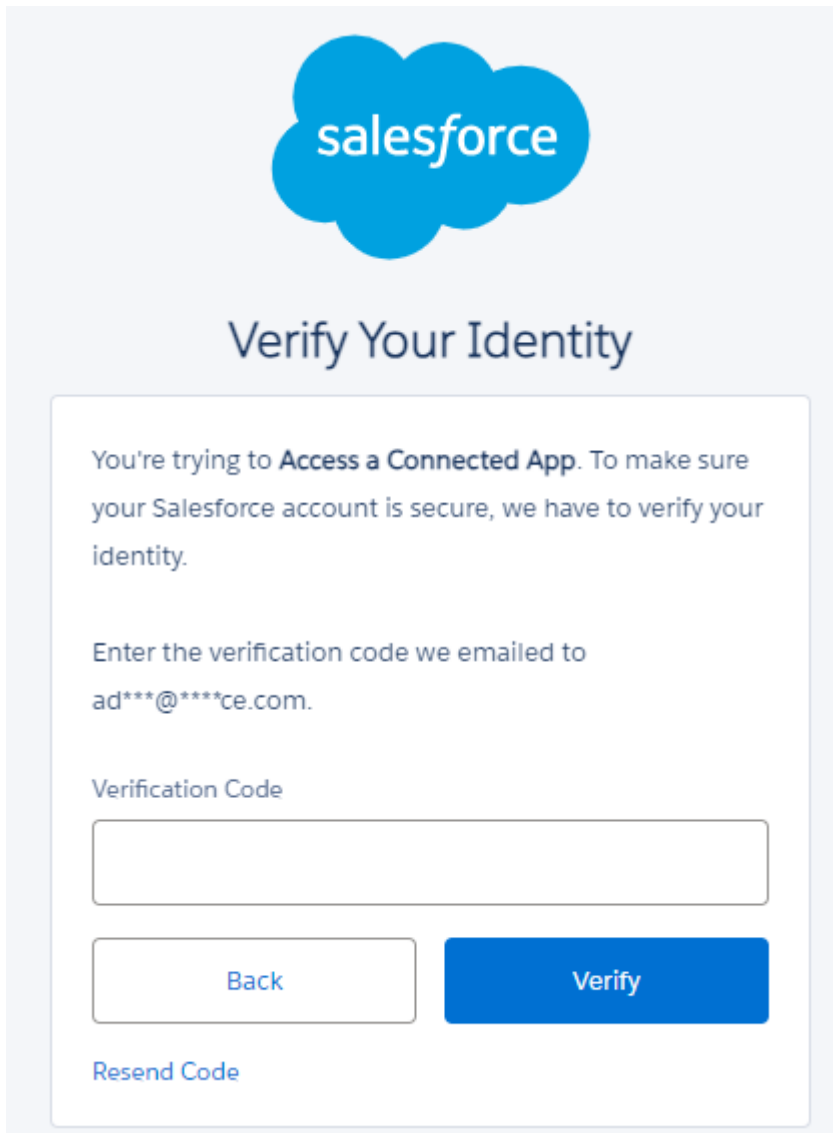
▼ API (Enable OAuth Settings)

Consumer Key and Secret

[Manage Consumer Details](#)

We will receive a verification code by email.





The image shows a Salesforce 'Verify Your Identity' screen. At the top is the Salesforce logo. Below it, the title 'Verify Your Identity' is centered. The main content area contains the following text: 'You're trying to **Access a Connected App**. To make sure your Salesforce account is secure, we have to verify your identity.' Below this is a prompt: 'Enter the verification code we emailed to ad***@****ce.com.' There is a text input field labeled 'Verification Code'. At the bottom of the form are two buttons: 'Back' and 'Verify'. Below the 'Verify' button is a link that says 'Resend Code'.

After verification, we will get access to two codes, Consumer Key and Consumer Secret.

Consumer Details

Consumer Key	3MVG9mVMtbWMH6ls4rpxDmo91OoXkJya2kiNhFy9QX93YZViCmKpdsJ7U5qZ6wpexDs3ll9lUjsGvzbxD8Of
	Copy
Consumer Secret	CDBBB11B641C2BEC7A530EFA16198FC11A3B0BD85D28BC01C01096D9E130BFBD
	Copy

IMPORTANT!

These codes are needed for further configuration, they should be saved.

Then return to the main screen (cancel button) and press the "Manage" button (remember that this step can be done only after waiting about 10 minutes)



Connected App Name
Quokka Integration

[← Back to List: Custom Apps](#)

[Edit](#) [Delete](#) [Manage](#)

Changes can take up to 10 minutes to take effect. Deleting a parent org also deletes all connected apps with OAuth settings enabled.



Version	1.0
API Name	Quokka_Integration
Created Date	22.03.2024 10:20
	By: Admin Clorce
Contact Email	marek.bartylak@clorce.com
Contact Phone	
Last Modified Date	22.03.2024 10:20
	By: Admin Clorce
Description	
Info URL	

Step Five - Create an account on Quokka jobs site

In this step, you need to create an account for the quokka.jobs application. You need to go to the address <https://quokka.jobs/org/auth/login>.

Then we click on the caption **Register your organization**.

To login to the application, please enter your Salesforce organization Id and click authorize. You will be redirected to Salesforce to authorize the application.

Salesforce organization Id

[Login with Salesforce](#)

Don't have an account? [Register your organization](#)

Select the type of org (e.g. sandbox as shown in the screenshot below) and fill in the fields **Consumer Key** and **Consumer Secret**.



To register your Salesforce account, please provide your
Consumer Key and Consumer Secret

Instance Type

Sandbox

Consumer Key

Consumer Secret

Authorize Connected App with Salesforce

If you already registered your organization, please [Login](#)

If the following screen appears ie that you still need to wait (the application configuration has not finished, sometimes it may take longer):

`error=redirect_uri_mismatch&error_description=redirect_uri%20must%20match%20configuration`

Then you need to agree to the transfer of data from Salesforce and you will find yourself in the main menu.



Job Offers:

0

Last Synced:

Organization Id: OODG5000001VNIPMAW

Instance URL: <https://multichem--marsbx.sandbox.my.salesforce.com>Your jobs listing page: <https://quokka.jobs/jobs/OODG5000001VNIPMAW>

IMPORTANT! Once the account is created, the **Organization ID** should be saved, as it has 3 more extra characters than the one found in Salesforce in company information.

Additional information

In Salesforce we can set the **GDPR** according to our needs, for this we go to Setup and look for Custom Metadata Type -> Job Offer Compliance Text (we will find six languages available there). Also there (Custom Metadata Type) we can set the default language of the application (Job Offer Default Language) and we can specify the domain address (Quokka Portal Configuration).

The next time you want to log in, you need to enter your previously saved **Organization Id**:

To login to the application, please enter your Salesforce organization Id and click authorize. You will be redirected to Salesforce to authorize the application.

Salesforce organization Id

Login with Salesforce

Don't have an account? [Register your organization](#)