Resonant-ATS

User Manual

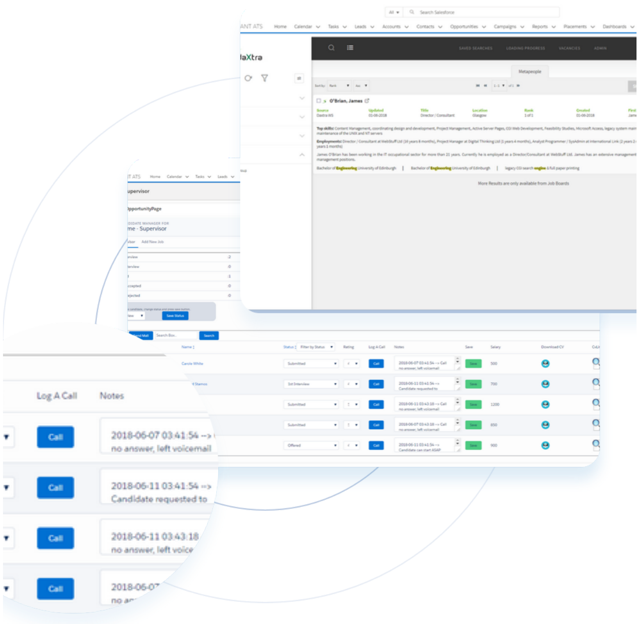
Resonant Cloud is proud to unveil its new product: Resonant-Applicant Tracking Systems (Resonant-ATS).

Overview

Resonant-ATS is the only recruitment solution that enables you to fully access the potential of the world's #1 CRM system; unlike other solutions on the Salesforce Platform, Resonant-ATS is built on Sales Cloud core technology. Not recreating this core functionality means that Resonant-ATS is more flexible and adaptable than any other Applicant Tracking System on the Salesforce Platform.

Unlike other Salesforce platform solutions, Resonant-ATS is built on the core Salesforce product, Sales Cloud and integrates easily with the full Sales, Service, Community & Marketing Cloud suite of tools

> "Resonant-ATS is the premium recruitment tool available to you today"



Now you can sell any product or service to your customer base from a single platform.

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Resonant-ATS is the ideal option for customers who sell more than just recruitment services: with Resonant-ATS, you can sell any product or service to your customer base from a single platform. Contract, permanent and temporary job opportunities sit side by side with consulting services, HR solutions, E-learning platform sales or any product sales at all. Placed side-by-side for the first time you can report on all service streams, recruitment and non-recruiting sales, together. Consultants and sales teams can share the same data for optimal operation, thus minimising handling and lead time, to the end of maximising results.

R-ATS application send email functionality helps you select different email templates so that you can send email as per the candidate interview status

Using a simple interface, administrator can check the current opportunity position, current campaign position and candidates position.

Support

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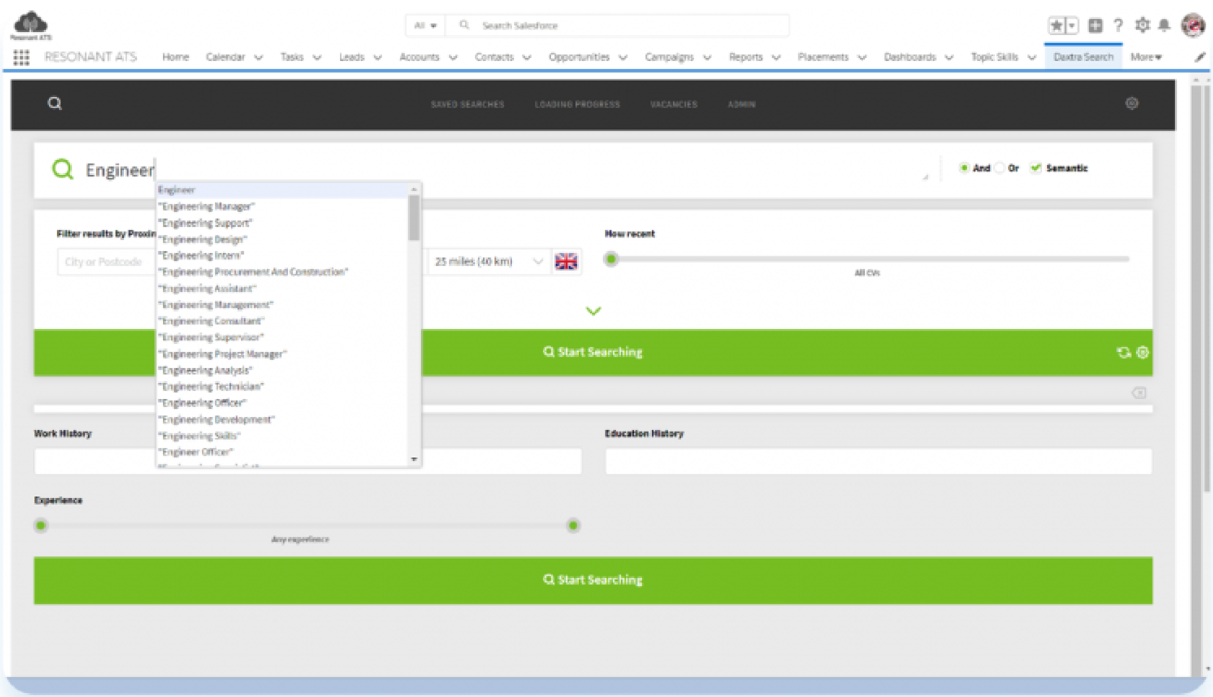
For support related issues or any other query related issues, you can email us to matt@resonantcloud.info

R-ATS is powered by Daxtra

The world's leading CV/resumé parsing solution provider – with DaXtra Capture and DaXtra Parser. Searching is powered by DaXtra Search



Mandatory steps to use this application:

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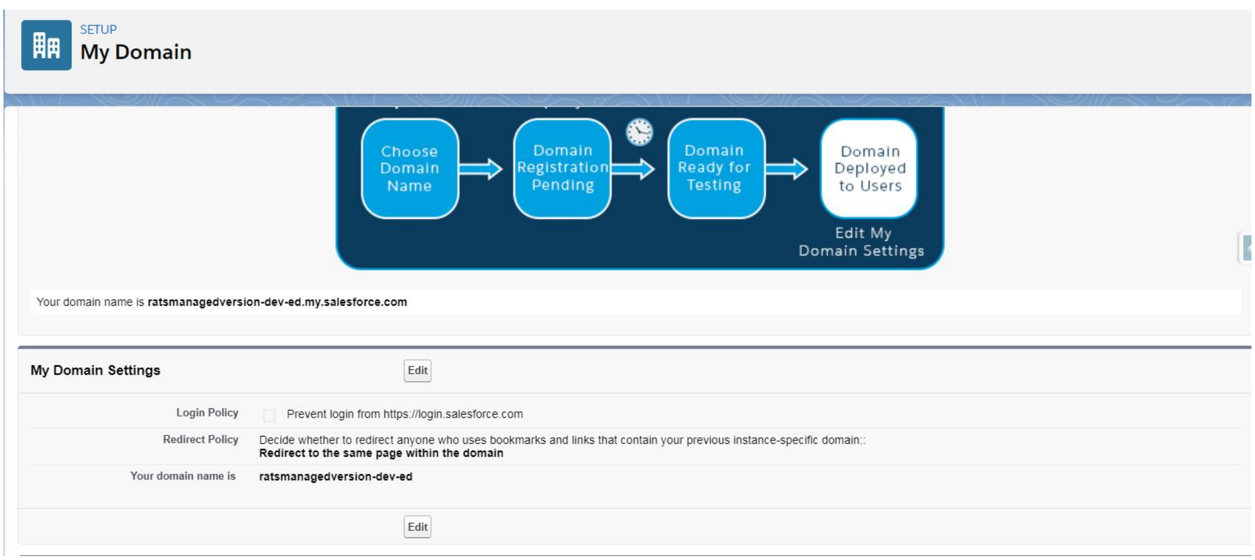
To use this application in Lightning version you will first have to register for domain.
(Please ignore the below 5 steps if you already have domain registered in Salesforce)

Please find the below steps for domain registration:
1. Go to “**setup**” (right to corner)
2. Find **“Domain”** in the quick find box (left side corner)
3. Click on **“My domain”**
4. Please register the domain and check for availability.
5. Deploy to users.

You will get the below image after deploying your domain to users:



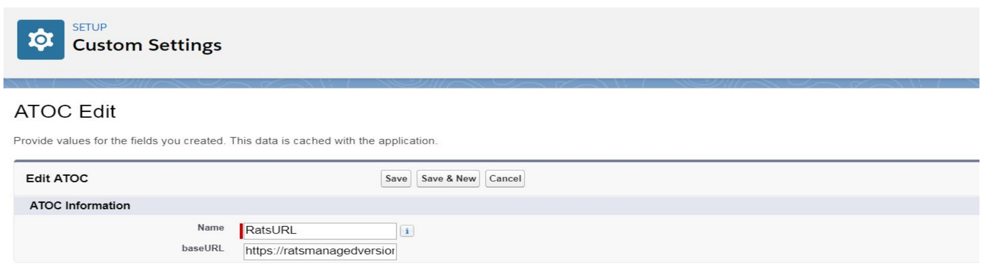
Now copy the link which is present after **“Your domain name is”**

Let’s search for the **custom settings from the quick find box** again as we have done the same for the searching the Domain

You will able to get the 3 custom settings:
1. ATOC
2. Campaign Member Status 1
3. Trigger Handler.

1. ATOC

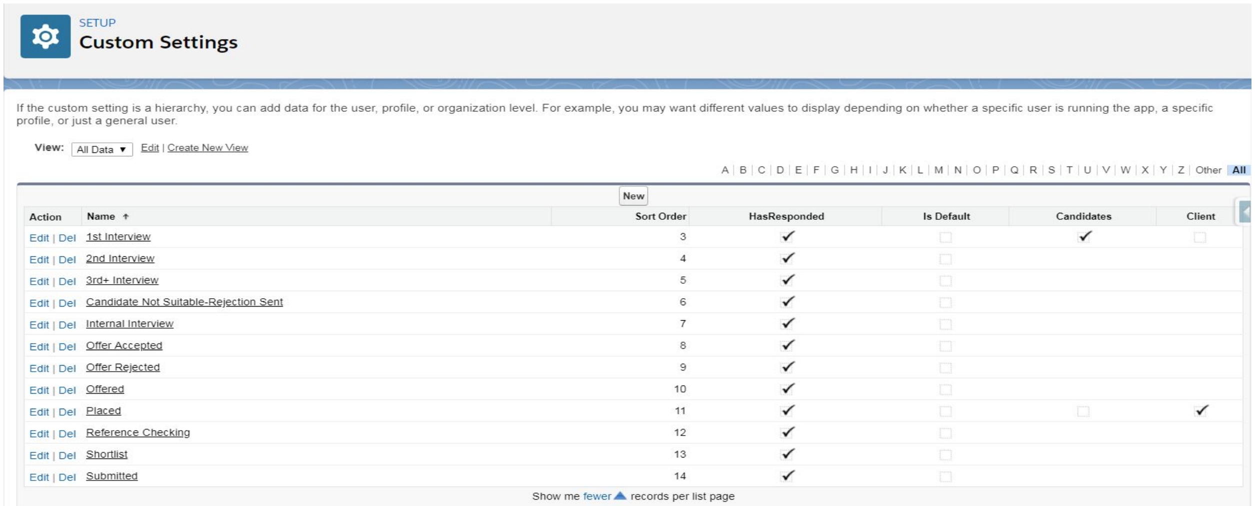
Now click on the **manage button** which is beside the custom setting called **ATOC**.
Click the edit button beside the name called "RatsURL" and paste that copied URL to the baseURL field and save it!



2. Campaign Member Status 1

This custom setting is used for inserting the different status in Campaign member standard object which is used for Campaigns.

Click the manage button before Campaign Member Status 1. There are different status present please find the example image below:



SETUP
Custom Settings

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

View: All Data Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

New

Action	Name ↑	Sort Order	HasResponded	Is Default	Candidates	Client
Edit | Del	1st Interview	3	✓	☐	✓	☐
Edit | Del	2nd Interview	4	✓	☐		
Edit | Del	3rd+ Interview	5	✓	☐		
Edit | Del	Candidate Not Suitable-Rejection Sent	6	✓	☐		
Edit | Del	Internal Interview	7	✓	☐		
Edit | Del	Offer Accepted	8	✓	☐		
Edit | Del	Offer Rejected	9	✓	☐		
Edit | Del	Offered	10	✓	☐		
Edit | Del	Placed	11	✓	☐	☐	✓
Edit | Del	Reference Checking	12	✓	☐		
Edit | Del	Shortlist	13	✓	☐		
Edit | Del	Submitted	14	✓	☐		

Show me fewer records per list page

You will see that there are multiple checkbox present for every status:
A. . Has Responded :- This checkbox must be ticked for enabling the use of this status
B. Is Default :- Only one checkbox must be ticked from all the status to use this status as default value.
C. Candidates :- This checkbox is ticked for used for Candidates Campaign.
D. Clients :- This checkbox is ticked for used for Client Campaign.

Some details regarding the Client and Candidates checkbox present in the above discussed custom setting:

As there are multiple record types present for Campaign like Permanent, Contract, Client, Candidate and Adhoc. So this checkbox helps you to identify that which status will be there for which type of Campaign. So for example, if we select a status called “1st Interview” and as you can see the candidate checkbox is checked for the status (image shown above).
So now this status will be only visible for the Candidate record type campaigns.
Same with the status called “Placed” it is the Client checkbox is selected for this status so only Client record type campaign will be able to see this status.
And if both the checkboxes are unticked and only “HasResponded” checkbox is ticked then that status will be shown to every record type present in Salesforce for the Campaign object except Client and Candidate.

3. Trigger Handler

Custom setting to make trigger active OR inactive. If the checkbox is ticked then the Trigger is active and if the checkbox is not ticked then the Trigger is inactive.

By default all the Apex Trigger are active:

CampaignTrigger:

As we have seen the above image where we need to insert the CampaignMemberStatus records now we need to use all these status with our campaigns.

So campaign Trigger helps to insert/update all the above created status values into the campaign member status field so that user can use those status for creating campaign member records.

PlacementTrigger:

Placement trigger helps to copy the data from the selected campaign while creating any placement record.

The fields which we use from campaign are:
Campaign Name, Bill Rate, Fee, Forecast, Pay Rate and Unit.

CampaignMember Trigger:

As you will see below that on Opportunity / Campaign we have a page called Candidate Manager in which you will a notes section so this trigger helps to save the notes from that with the current timestamp of the user who is trying to save that notes.

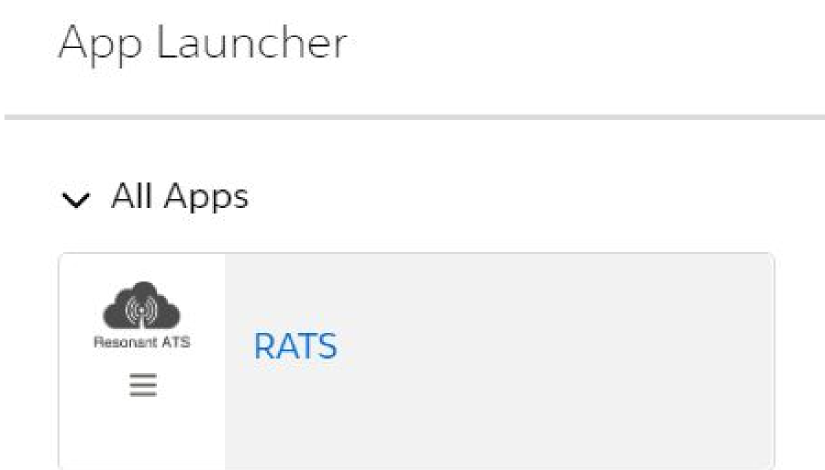
There is one section on the same candidate manager page where you can see different rows which highlights you that what how many candidates are selected for 1st Interview or Current Placed so this trigger helps to update the campaign fields called current or total placed and etc. So that user can know how many how many candidates are placed from their current campaign (current placed) and how many candidates are placed from all the campaigns present in their system (total placed).

So as we have updated some code in our application now there are no apex trigger present on Contact or ContentDocument in R-ATS.

Now let's use the R-ATS application now.

How to use R-ATS

R-ATS is available in Salesforce Lightning. Select the R-ATS application from the App Launcher menu.



After selecting the R-ATS application from the app launcher now let’s take a ride of this newly installed application.

Firstly let’s create a demo contact:

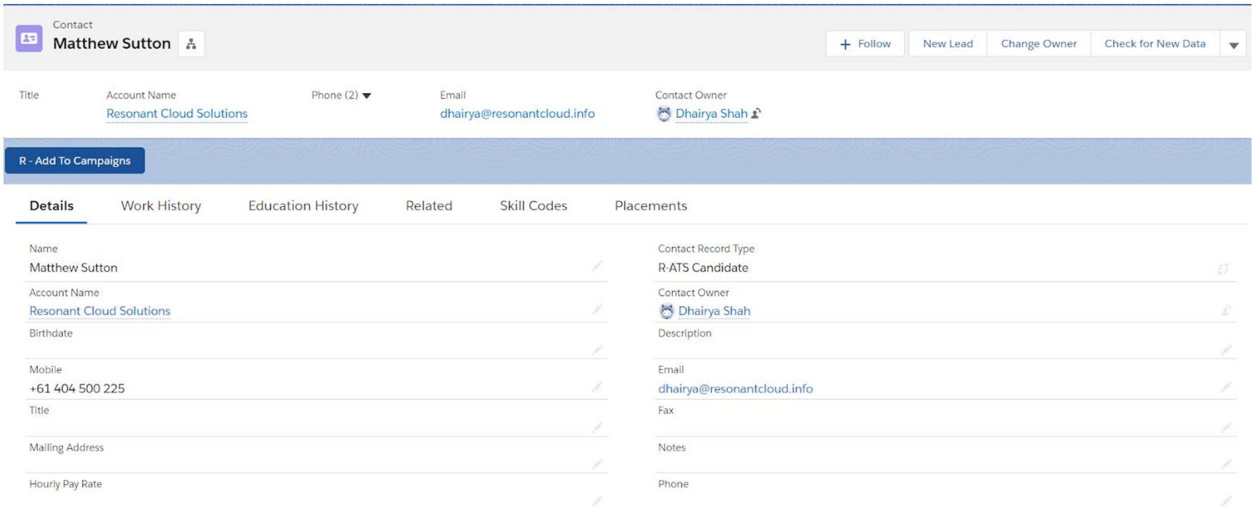
Now while creating contact you will get a popup of Contact Record types:

1. R-ATS Candidate.
2. R-ATS Client.

So let’s select candidate record type for creating the contact.
Contact Salutation: **Mr.**
Contact First Name: **Matthew**
Contact Last Name: **Sutton**
Contact Account: “You can select any of the account which is present in our Salesforce org”

Contact Email: matt@resonantcloud.info
Contact Mobile: +61 404 500 225

Now you will see that the contact is created in Salesforce with the record type Candidate:



Now you will see a button called " **R - Add to Campaigns** " in which you will see different list of active campaigns present in your Salesforce organization.

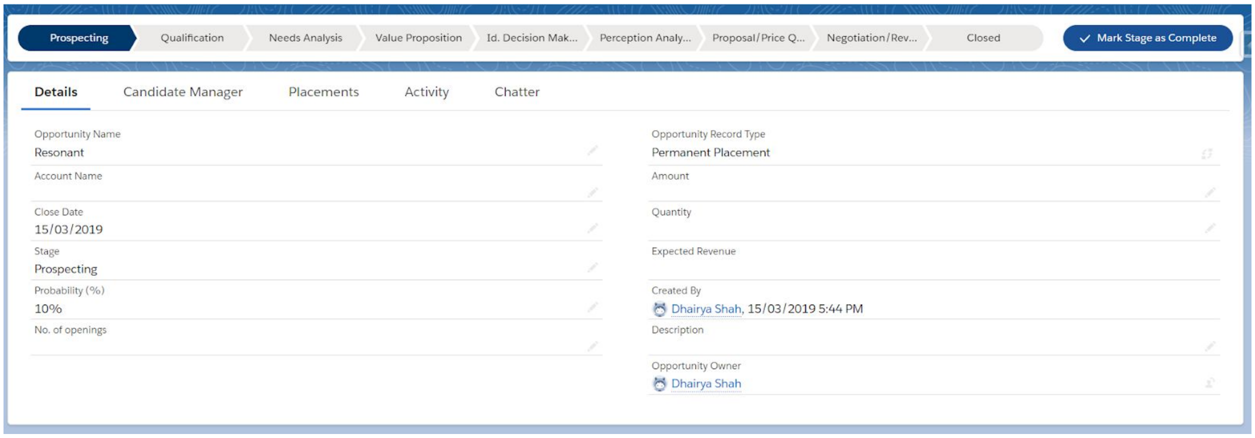
Note: Please check the Mandatory steps before using this button.

Let's create a demo Opportunity:

For creating opportunity there are 3 record types:
1. Permanent Placement.
2. Adhoc.
3. Contract Placement.

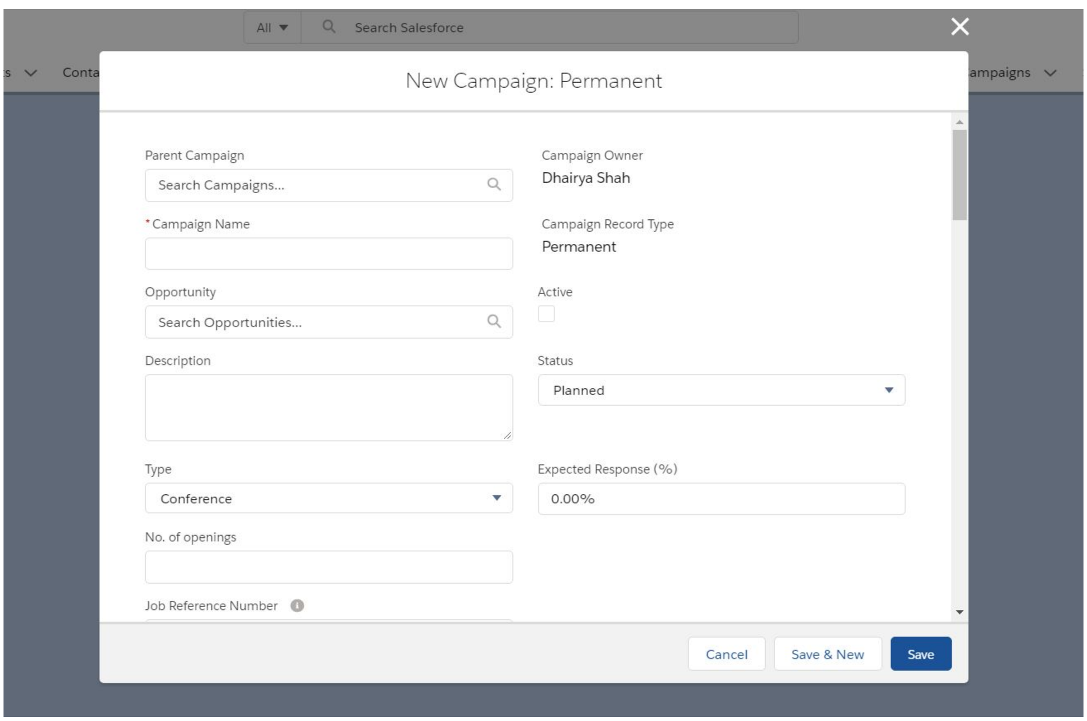
Select the opportunity record type: " **Permanent Placement** "
Opportunity Name: **Resonant.**
Opportunity Close date: **Today's date.**
Opportunity Stage: **Prospecting.**
Save the record!

The opportunity record is created:



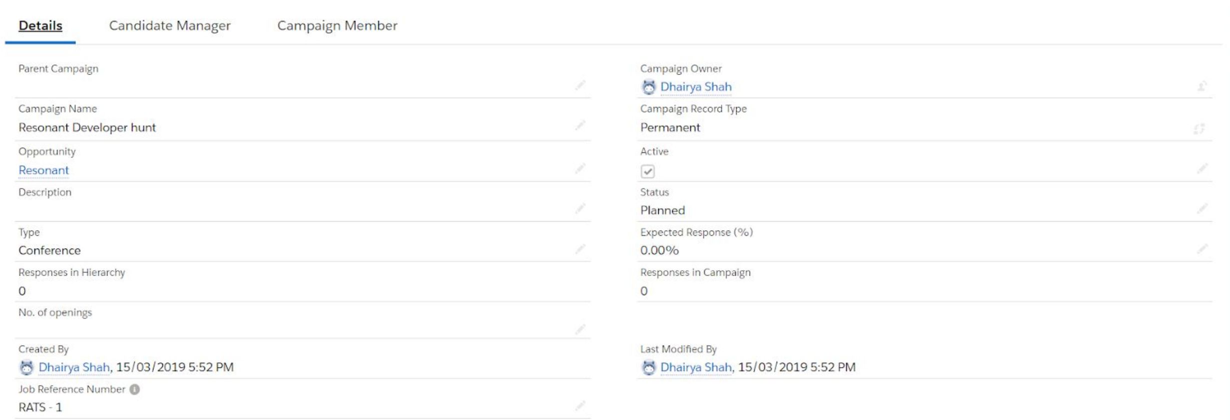
Now let's click the Candidate Manager tab beside the Opportunity Details tab. Click the button called **Add New Job**

You will find a popup of Campaign with the Same Record type : "Permanent" as the Record type for the created Opportunity is "Permanent Placement"



Let’s create a demo Campaign:

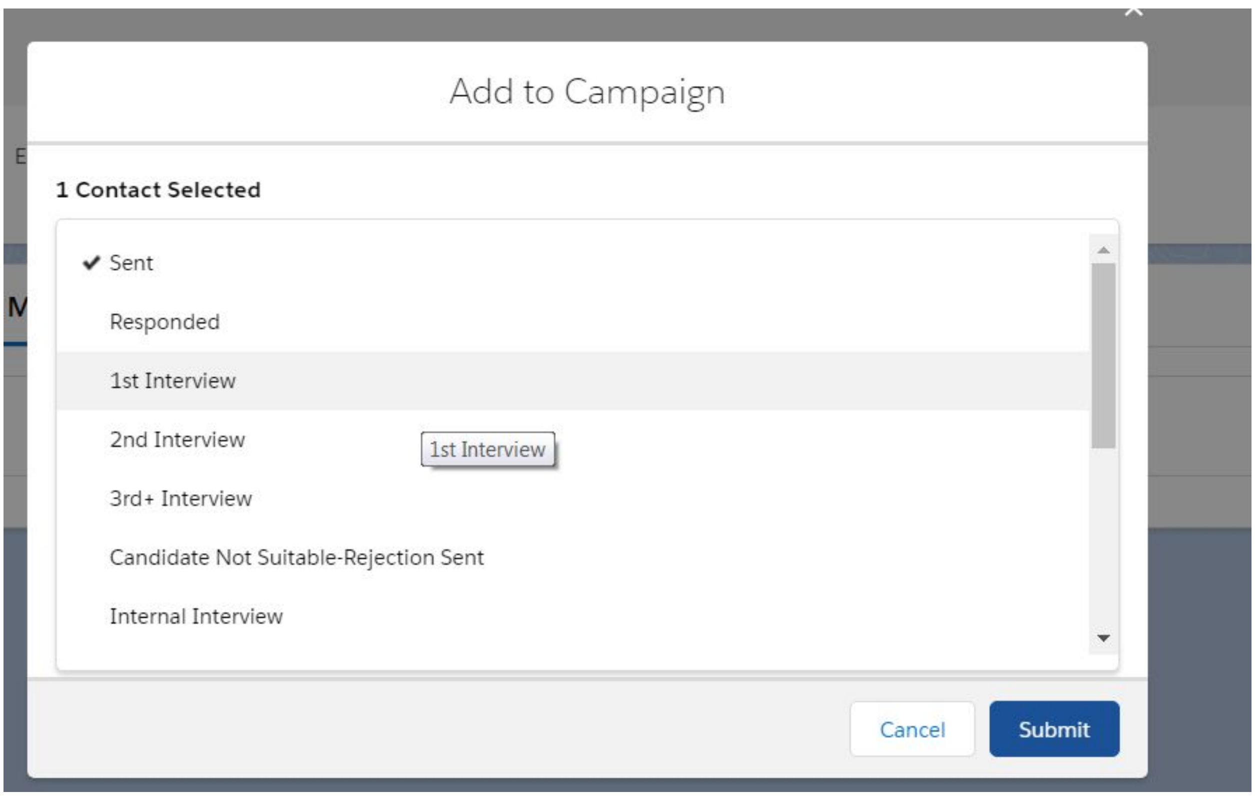
Campaign Name: **Resonant Developer Hunt**
Opportunity: **Select the created opportunity “ Resonant “**
Job Reference Number: **RATS - 1**
Active: TRUE



Now let’s the campaign members which is nothing but Contact / Leads. As this application is working only for Contacts so let’s add the newly created contact to this campaign as a campaign member.

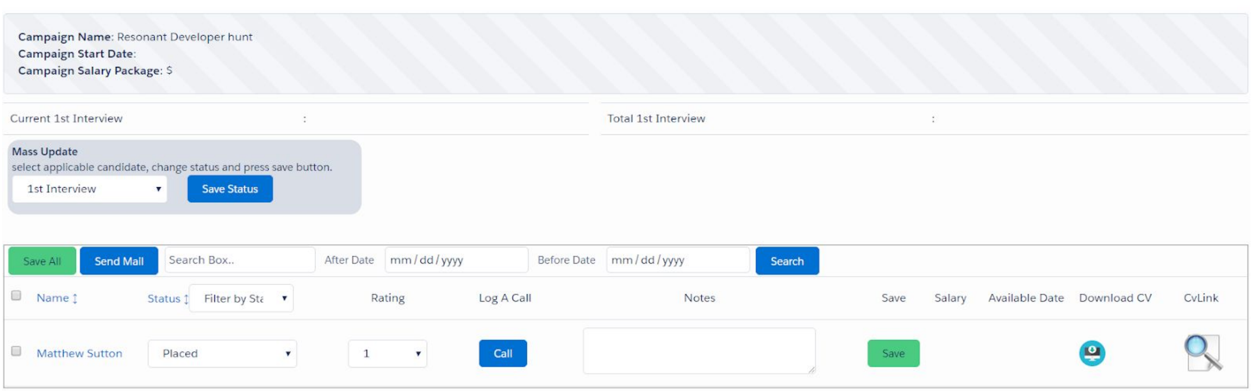
Click the Campaign member tab you will see a button called **Add Contacts** search for the contact that has been created above **“Matthew Sutton”** click next and select the status. The status are been set from the custom setting called Campaign Member status 1.

Note: Please find the detailed explanation of the custom setting in the Mandatory steps section.



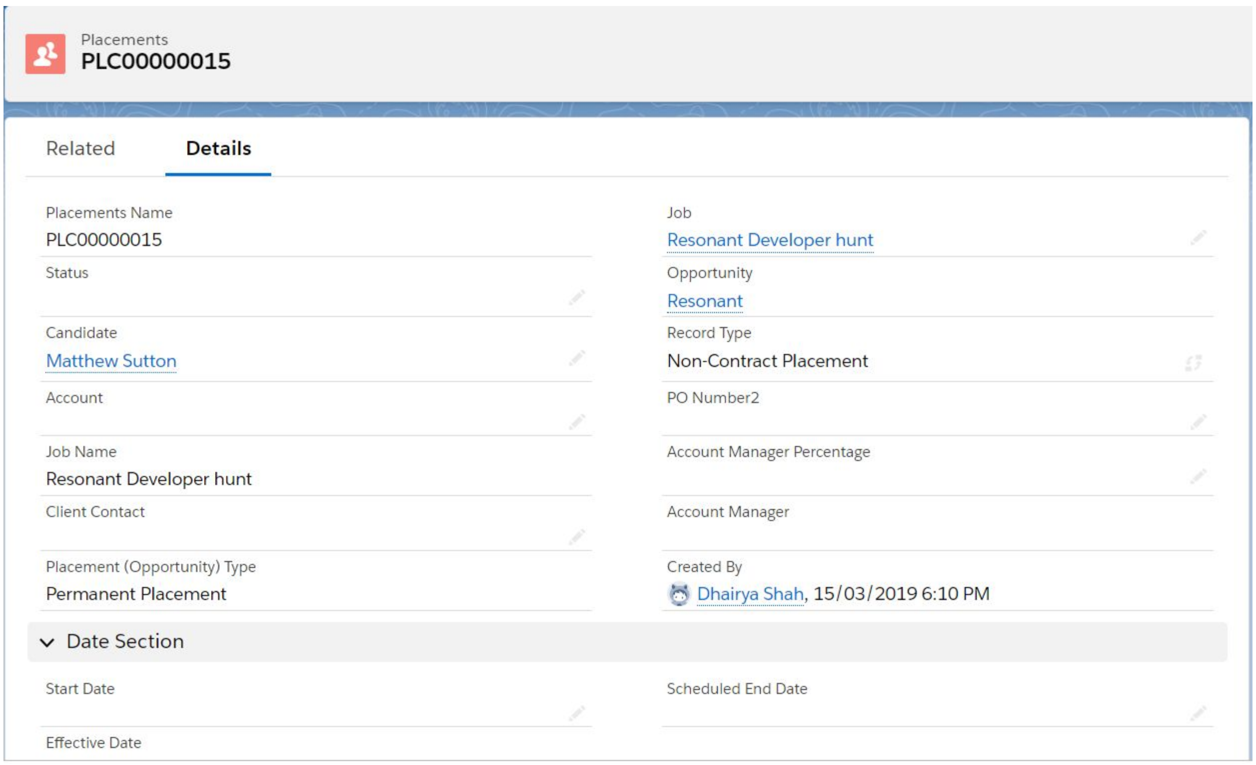
Let's select the status called **"Placed"** and click Submit.

Now reload the Candidate Manager present on Campaign and Opportunity you will find that Contact is added as a campaign member for that Campaign with Status = Placed.



Creation of Placement Record (Automatically):

As above we have seen that campaign member is stored under the Campaign called "Resonant Developer Hunt" now whenever a campaign member is stored with the status called "**Placed**". A new record is getting created under the placement object. Please find the shared image below:



So for the placement we do have 2 record types:

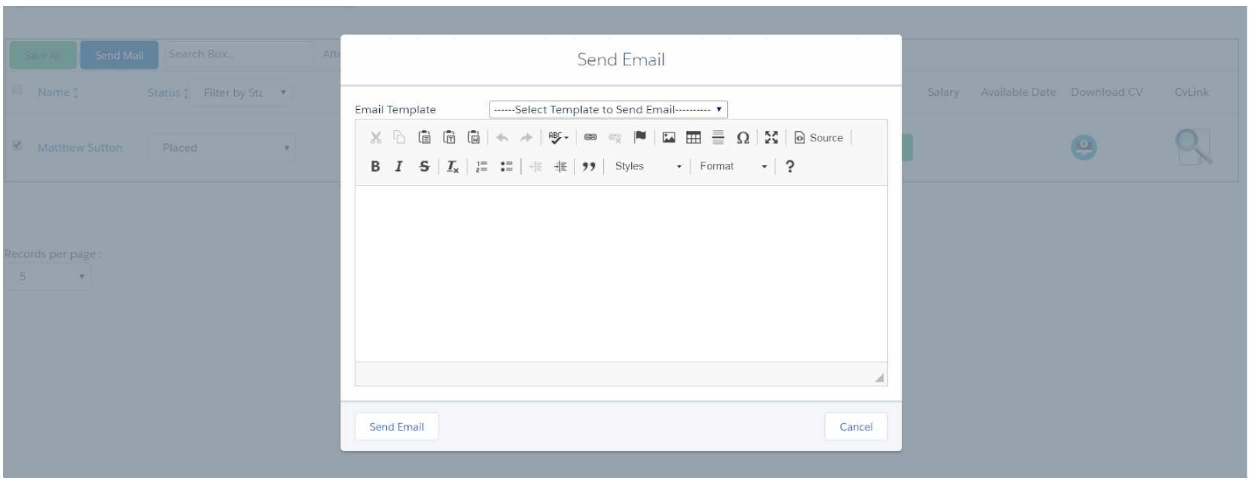
1. Non - Contract Placement
2. Contract Placement

If the Campaign and Opportunity record type is Permanent then the Placement record will be created with Non - Contract Placement and if the Campaign and Opportunity record type is not Permanent then Contact Placement record will be created.

Sending email to the Candidates:

Now let's send the email to the candidates. On the candidate manager page you will see a "**Send Mail**" button.

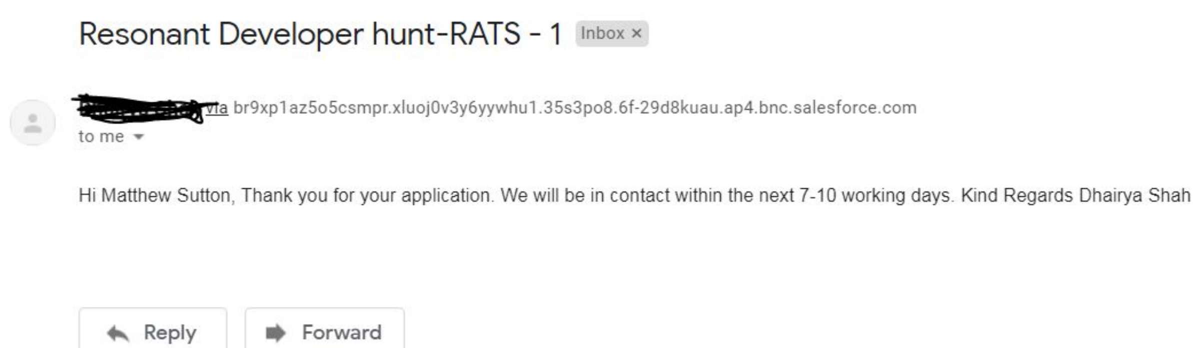
Select the candidates from the list and click send email button you will see a popup page which contains different email templates which will be used to send the email to the candidates:



Select the templates from the list or you can create your own templates under:
Email templates >> RATS Folder (Make sure you create email templates in RATS folder)

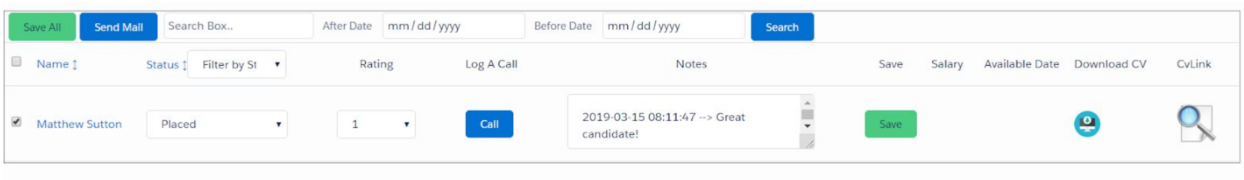
Click the send button and then you will be automatically redirected back to the main page.

So we got a new mail!



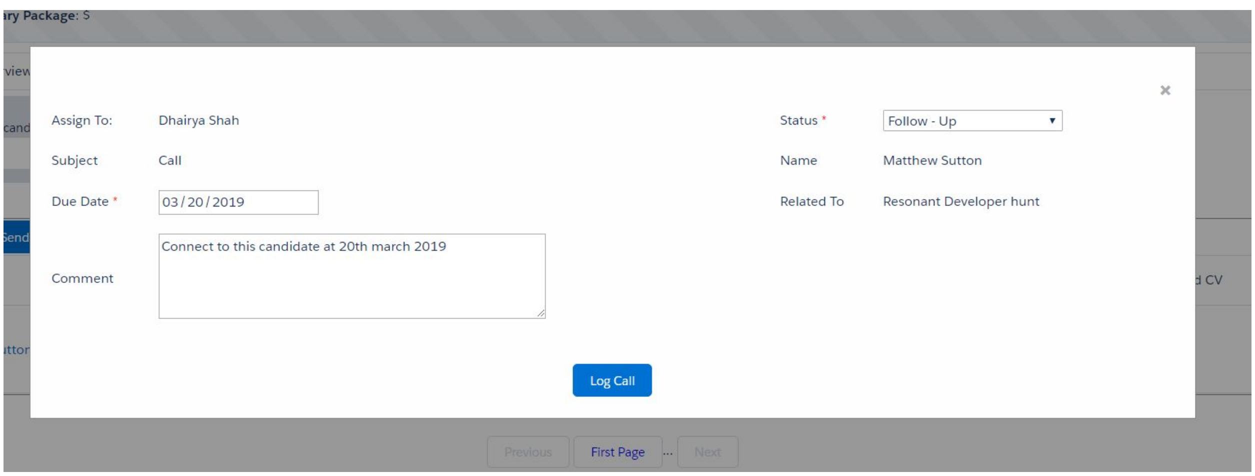
Saving new notes to the particular candidates:

Now this is one interesting feature that will help you to save the comments for the candidates with the date and time stamp so that you will able to get that at which date you have stored new comments for the candidates.



Log a Call functionality:

Call button will help you create a task for that particular candidate that for example the candidates need to be connected after 4 days then you can just click the call button and fill the details as per shared in below image:



So this way you will can create a task in Salesforce.

Download CV:

For downloading Candidate CV it needs to be uploaded first for that candidate. As Lightning doesn't support attachment any more so we are using Salesforce files for storing the CV of candidates.

Let's click on the candidate Matthew Sutton from the candidate manager page and you be redirected back to the Contact page where you will find a tab name called "**Related List**" under the related list you will find "**Notes & Attachments**" upload the CV here.

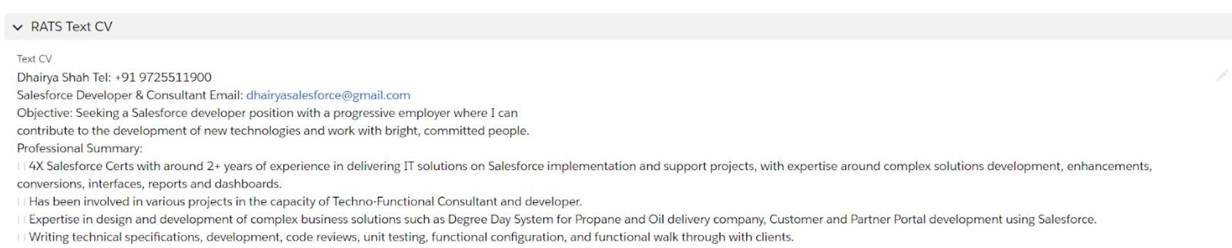
Now go back to the candidate manager page and refresh the page.

Click on the download CV image you will find a popup which will show the uploaded CV so you can download the CV now.

Don't want to download the CV let's first preview it!:

R-ATS does have the ability to make the CV only viewable and which helps users to waste time downloading it into their space and the view from there.

Let's get back to that contact where you will find the RATS Text CV field just copy paste your CV their that's it.



RATS Text CV

Text CV

Dhairya Shah Tel: +91 9725511900

Salesforce Developer & Consultant Email: dhairyasalesforce@gmail.com

Objective: Seeking a Salesforce developer position with a progressive employer where I can contribute to the development of new technologies and work with bright, committed people.

Professional Summary:

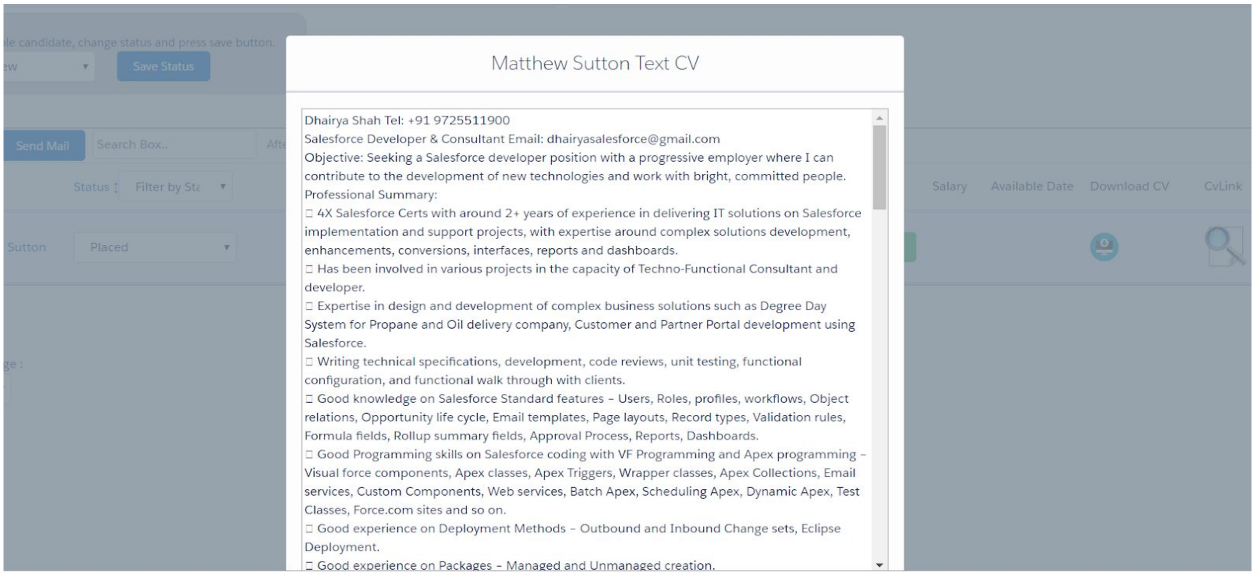
4X Salesforce Certs with around 2+ years of experience in delivering IT solutions on Salesforce implementation and support projects, with expertise around complex solutions development, enhancements, conversions, interfaces, reports and dashboards.

Has been involved in various projects in the capacity of Techno-Functional Consultant and developer.

Expertise in design and development of complex business solutions such as Degree Day System for Propane and Oil delivery company, Customer and Partner Portal development using Salesforce.

Writing technical specifications, development, code reviews, unit testing, functional configuration, and functional walk through with clients.

Now let's click on the preview option beside download CV you will find the whole CV is now available to view without downloading it into your space.



Some other important general functionalities:

- Mass status update by selecting multiple checkbox.
- Search for the candidate name or available date.
- Records can be viewed from size 5 to max 20 per page.
- Rating system.
- Candidates can be filtered using status.
- Sort using candidates name or status.

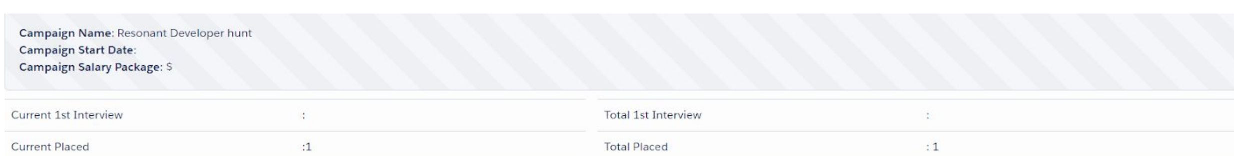
Changing the fields in Candidate Manager page:

I am sure you noticed that there are 2 fields present below campaign details in candidate manager page:
1. Current 1st Interview and 2. Total 1st Interview

Now let's change those fields we don't want 1st Interview so let's click the Tab called **"Left Right Fields"** from the main Navigation panel:

The left side fields which help us to show the left side column present in candidate manager page and same for the right side fields.

Then middle panel shows all the list present in the **Campaign object.**
Now let's select the current placed field and total placed field from the middle panel.
Current fields in left side panel and total fields in right side panel then just click save.
Go back to the Candidate Manager page (Campaign or Opportunity).

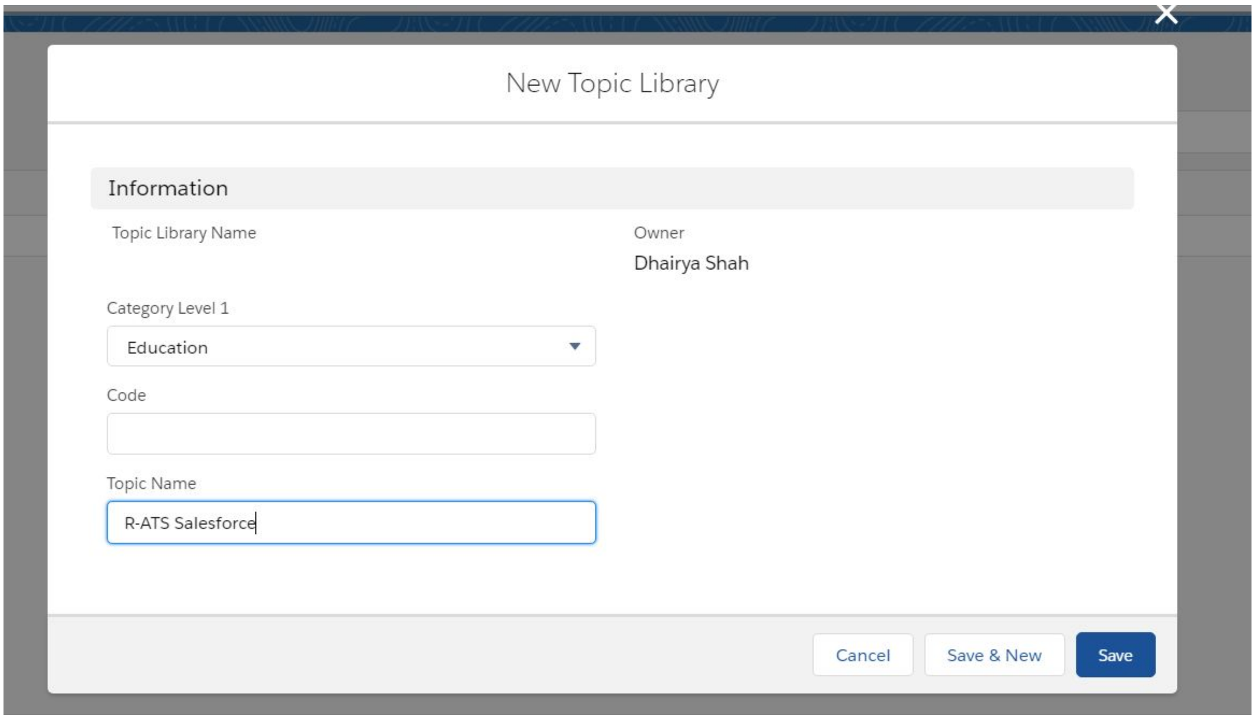


You will see that it does contains a number called 1 and it's because we have placed candidate present in this application. So if the candidate status is 1st Interview then it will show that how many candidates are in 1st interview status and how many candidate are placed.

Let's find the candidate based on their skills:

For creating skills let's go the tab called Topic Libraries you will find that there are multiple category level present while creating a new topic library data:

Enter the topic name with selecting the topic category and just save it.



Now let's go the contact "Matthew Sutton" where you will find a tab called Skills Codes and in that you find the category level which does have our newly created topic.

Select the topic R-ATS Salesforce and you can also try to create more than 1 topic in this case we are selecting 2 topics R-ATS Salesforce and Salesforce and click save button.

Now what? How to identify skills when you have a lot of record present in Salesforce?

No worries we do have solution for you. Have you seen a tab called **Skill Based Contact** just click that tab and you will find a whole new page with a new and interesting functionality.

You just need to know that whether you are searching skills for clients or candidates but if you don’t know then also this page will help you to find your perfect skills candidate.

For us we know Matthew Sutton is candidate then let’s tick the checkbox candidate.
We don’t know his available date nor his salary as Matt is very busy man!
Now let’s select the skills that we are trying to search and then click **SEARCH**

Now you will get your candidate in the below list:

Now you know that you can add your candidates directly to any campaigns by just clicking the Add to Campaign button.

You will be redirected to the some known page which we had already seen before. So select the status and just click the button called **Add to Campaigns** that’s it your selected skilled candidate is now a part of the selected campaign.

So this is what exactly the R-ATS is and we are committed to helping our clients get the best results in using Salesforce as a CRM solution. Every satisfied customer you serve is every mission achieved for us here at Resonant Cloud Solutions.

For any queries or any question you can connect to Matthew Sutton at matt@resonantcloud.info