



Administration Manual

Table of Contents



Setup and Configuration (pg 3 - 13)

Initial Setup

- Page 3: Set Account ID for newly parsed resumes
- Page 4: Set Candidate Record Type for newly parsed resumes
- Page 5: Set the resume source field to embed the picklist within the parser
- Page 6: Set the email field to parse to

Parser Interface Setup Options

- Page 7: Add Parser to Home Page
- Page 8: Add Parser to Utility Bar
- Page 9: Add Parser to Contact Record Lightning page
- Page 10: Add Related Listed to Contact Record

Viewer and Custom Field Setup Options

- Page 11-12: Add viewer to Record Lightning page
- Page 13: Optional viewer settings
- Page 14: Parsli Custom Field Setup

Initial Setup

Set Account ID for newly parsed resumes (<5 minutes - Critical)



START HERE FIRST

Resumes that come into the system create new contacts, but they do not create new accounts (by design). You need to add the account ID that the resumes will associate with in settings. Here's how.

Steps:

1. Type "Custom Metadata Types" into setup search and click on it
2. Click "Manage Records" next to the Parsli Parser Configuration record
3. Click "Edit"
4. Copy the Account ID from the "Candidates" account you already have or create a new account dedicated to candidates and then copy the ID.



*You can grab the ID by navigating to the Account and looking for an 18 digit ID that starts with "001" in the URL bar. Example:



Paste the ID in the "Candidate Account Id" field and click "Save" - that's it. Now, on to the next thing.

Initial Setup

Set Candidate Record Type for newly parsed resumes (<5 minutes - Optional)



The system will create contact records with your default record type out of the box. If you want to specify a contact record type you can add it by taking the following steps:

Steps:

1. Type “Custom Metadata Types” into setup search and click on it
2. Click “Manage Records” next to the Parsli Parser Configuration record
3. Click “Edit”

Apex Test History
Apex Triggers
Canvas App Previewer
Custom Metadata Types
Custom Permissions

Action	Label
Manage Records	Parsli Parser Configuration

Find the Contact Record Type Id by navigating to the desired record type (Setup>>Object Manager>>Contact>>Record Types>>click on desired type) and copying the 18 digit ID in the URL bar.

Paste the ID in the “Candidate Record Type Id” field and click “Save” - that’s it.

Initial Setup

Set the resume source field to embed the picklist within the parser (<5 minutes - Optional)



The system will create embed a contact picklist field for use on the parser to track source. Input the API name of the field in the Picklist API Name Custom Metadata field.

Steps:

1. Type “Custom Metadata Types” into setup search and click on it
2. Click “Manage Records” next to the Parsli Parser Configuration record
3. Click “Edit”

Find the Contact picklist API Name by navigating to the desired field (Setup>>Object Manager>>Contact>>Fields>>click on desired field) and copying the Name (NOT THE LABEL).

Paste the field API name in the Picklist API Name field.

The screenshot displays the Salesforce Setup interface. On the left, a navigation menu lists various setup areas, with 'Custom Metadata Types' highlighted. The main content area shows the 'Custom Metadata Types' page for 'parsli Parser Configuration (Managed)'. A yellow banner indicates that the configuration is managed and certain attributes are read-only. Below this, the 'Information' section contains fields for 'Label' (Parser Configuration), 'Parser Configuration Name' (Parser_Configuration), 'Candidate Account Id' (0012T0001b0WQAA), 'Candidate Record Type Id', 'Log Level' (Error Only), and 'Picklist API Name' (Source__c). Buttons for 'Save', 'Save & New', and 'Cancel' are visible at the bottom of the form.

Initial Setup

Choose any email field on the contact to send the parsed email (<5 minutes - Optional)



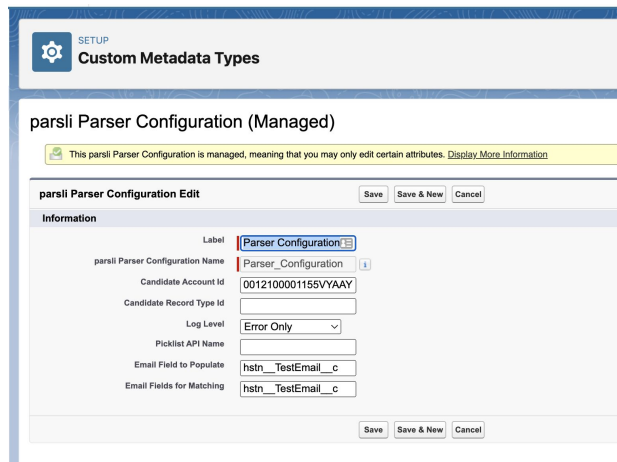
The system will send the email to the standard email field by default. However, if you want, you can send it to a custom contact email. field Input the API name of the field in the Email Field to Populate Custom Metadata field.

Steps:

1. Type “Custom Metadata Types” into setup search and click on it
2. Click “Manage Records” next to the Parsli Parser Configuration record
3. Click “Edit”

Find the Contact picklist API Name by navigating to the desired field (Setup>>Object Manager>>Contact>>Fields>>click on desired field) and copying the Name (NOT THE LABEL).

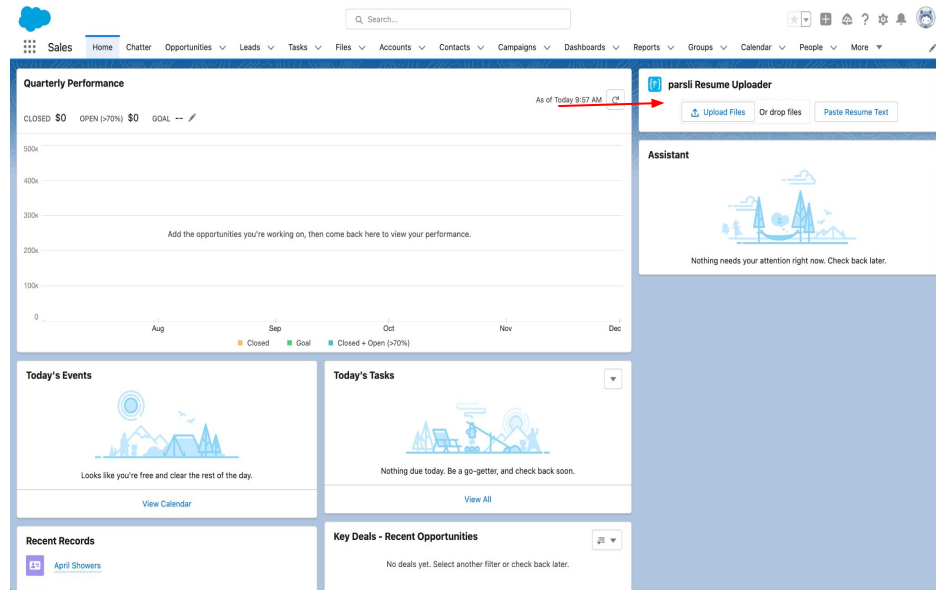
Paste the field API name in the Email Field to Populate API Name field.



Add Parser to Home Page



1. While on the home page, click on the gear in the upper right corner
2. Select “Edit Page”
3. Search for “Parsli” in the component search on the left side
4. Drag-and-drop “Parsli Resume Parser” custom component onto the home page.
5. Click “Save” in the upper right corner



NOTE: You must have “My Domain” implemented in order to see custom components. Click [here](#) to see how to do it.

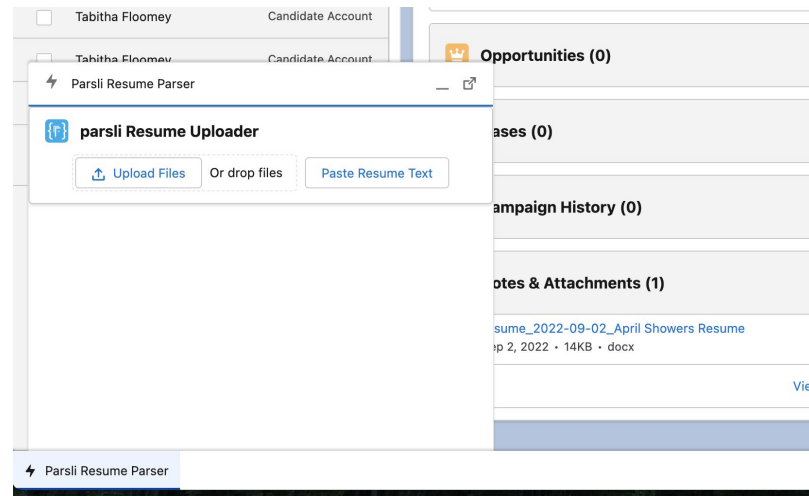
Add Parser to Utility Bar



1. Click on the gear in the upper right corner and select “Setup”
2. Search for “App Manager” in the menu search on the left side
3. Select App Manager
4. Locate your app from the list of apps (make sure it’s the Lightning one) and click “Edit” in the drop down button on the right side of the page that corresponds to the app you want to edit.
5. Click on “Utility Items” on the left side of the page
6. Click “Add Utility Item”
7. Search for “Parsli” and select it
8. Click “Save” and navigate out of app manager tool

Optional Configuration

- *Update label to verbiage that works best for your team*
- *Set Panel width to 480 and panel height to 400*
- *Select “Start Automatically”*

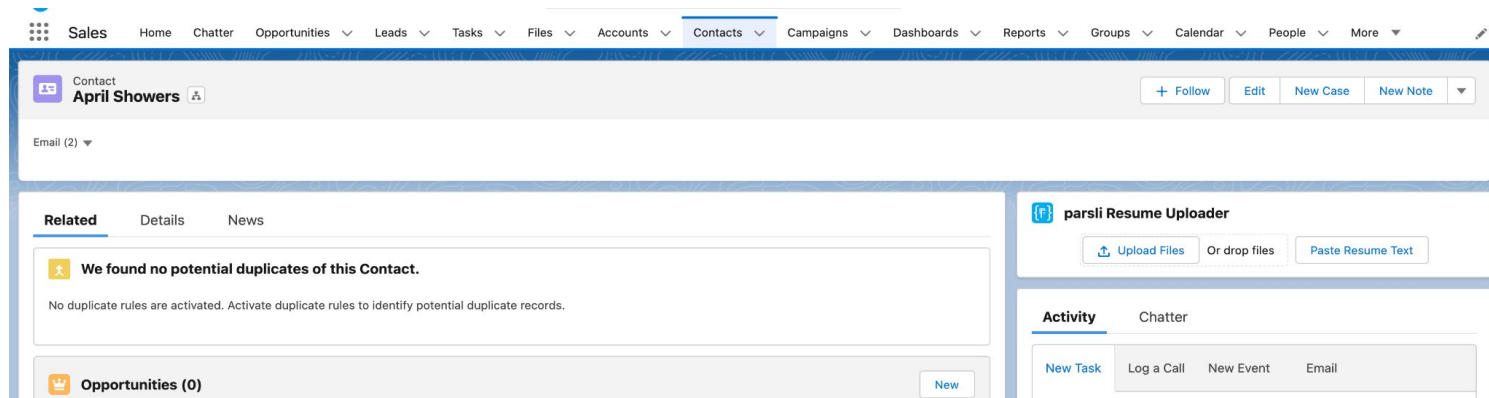


NOTE: You must have “My Domain” implemented in order to see custom components. Click [here](#) to see how to do it.

Add Parser to Contact Record Lightning Page



1. While on the contact record page, click on the gear in the upper right corner
2. Select “Edit Page”
3. Search for “Parsli” in the component search on the left side
4. Drag-and-drop “Parsli Resume Parser” custom component onto the contact page.
5. Click “Save” in the upper right corner



NOTE: You must have “My Domain” implemented in order to see custom components. Click [here](#) to see how to do it.

Optional: Add Related Lists to Contact Page



1. If you'd like to see the new related lists, (Skills, Education History, and Work History) on the Contact record then you will want to add them to the Contact page layout
2. Go to Setup; Click on Object Manager; Click on Contact Object; Click on Page Layout on the left side; Select the page layout you want to edit
3. Click on Related Lists and select the Related List you would like to add to the page layout
4. Select the columns of data that you would like to view on the list
5. Click Save

Contact
Logan Huntzberger

Employment Histories (6+)

Employment History Name	Title	Start Date	End Date
INTERNATIONAL DECISIONS SYSTEMS	Senior Project Manager	09/2014	12/2021
No Company Specified	Project Manager/Product Owner Platform	06/2013	12/2021
MESSAGE SYSTEMS		09/2012	09/2014
KRISTENSEN		01/2008	06/2013
No Company Specified	Director of Client Success Team Operatio...	09/2012	06/2013
MESSAGE SYSTEMS		03/2008	09/2012

[View All](#)

Education Histories (1)

Education History Name	Degree Name	Major	Degree Year
STATE OF NEW YORK AT BINGHAMTON	Bachelors	Law & Society and German Language an...	

[View All](#)

Skills (6+)

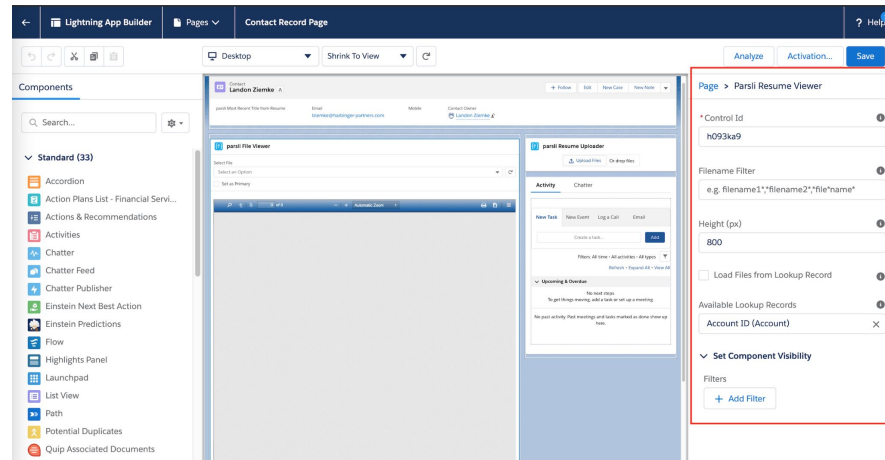
Skill Name	Skill Type	Date Last Used	Months Experience
Knowledge Management	IT	12/15/2021	88
Intrusion Detection Systems	IT	12/15/2021	88
Extranet	IT	6/1/2003	54
Microsoft Office	IT	6/1/2013	26

Add Viewer to Contact Record Lightning Page

Standard Configuration



1. While on the record page, click on the gear in the upper right corner
2. Select “Edit Page”
3. Search for “Parsli” in the component search on the left side
4. Drag-and-drop “Parsli Resume Viewer” custom component onto the contact page. You will get an invalid component message. We will clear that up in the next step.
5. ****THIS IS THE MOST CONFUSING PART - read carefully:**
You need to set the Control Id. I know. It sounds scary. The ID can be created with *any* combination of letters and numbers (example: ABC123), it just needs to be unique. In other words, if you are putting the viewer on multiple objects you need to ensure that each of them has a unique Control Id. Ok. Phew! Glad that is done! And the error went away!
6. Click “Save” in the upper right corner



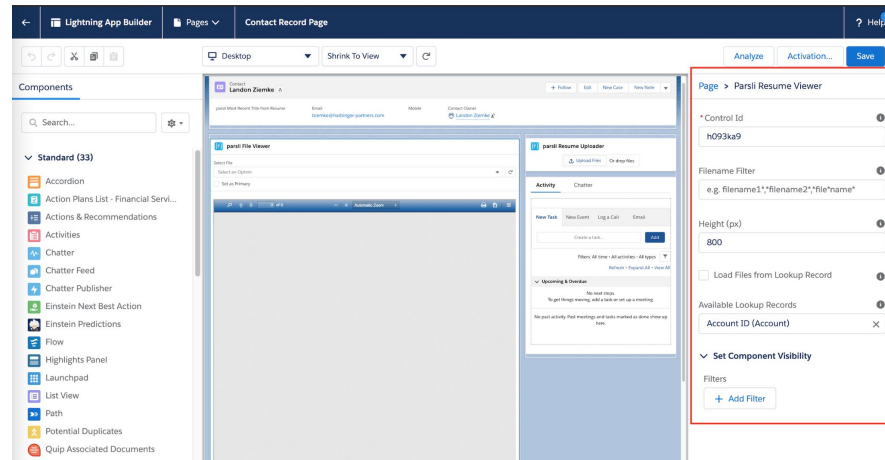
NOTE: You must have “My Domain” implemented in order to see custom components. Click [here](#) to see how to do it.

Add Viewer to Any Record Lightning Page

Standard Configuration Continued...



1. While on any record page you can add the viewer component as you just did on the contact page.
2. Click on the gear in the upper right corner
3. Select “Edit Page”
4. Search for “Parsli” in the component search on the left side
5. Drag-and-drop “Parsli Resume Viewer” custom component onto the contact page. You will get an invalid component message. We will clear that up in the next step.
6. ****THIS IS THE MOST CONFUSING PART - read carefully:** You need to set the Control Id. I know. It sounds scary. The ID can be created with *any* combination of letters and numbers (example: ABC123), it just needs to be unique. In other words, if you are putting the viewer on multiple objects you need to ensure that each of them has a unique Control Id. Ok. Phew! Glad that is done! And the error went away!
7. Click “Save” in the upper right corner



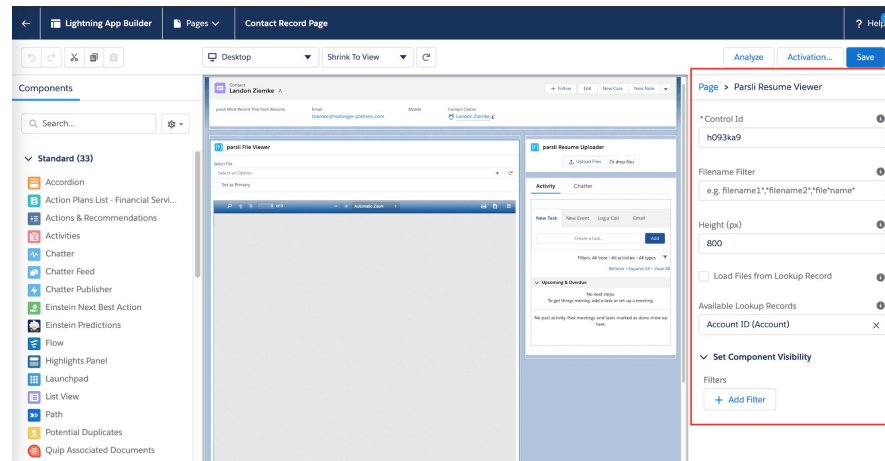
NOTE: You must have “My Domain” implemented in order to see custom components. Click [here](#) to see how to do it.

Add Viewer to Record Lightning Page

Optional Configuration



- **Set filename filter:** Tip - look at the info bubble for guidance. On a basic level the viewer can visualize any document, so you may want to limit it to just show documents with “resume” in the filename.
- **Adjust the height if desired:** We have defaulted it to 800 which is a height that allows you to see full standard size pages, but you can select any size you want. Play with it if you want!
- **Display files that are associated with objects that lookup to current record:** Select “Load Files from Lookup Records” and then select from the “Available Lookup Records.” You would set this up if, for example, you want to see the candidate’s resume while viewing their application records.
- **Add a filter for the component** if you only want it to show up in certain circumstances.



NOTE: You must have “My Domain” implemented in order to see custom components. Click [here](#) to see how to do it.



Parsli Custom Fields Setup

Add fields to the desired Contact page layout. This is typically a page layout that is associated with a Candidate record type if you are using record types.

1. While on the contact record page, click on the gear in the upper right corner
2. Select “Edit Object”
3. Click on “Page Layouts” and select the page layout you want to edit
4. Drag and drop all of the fields you want to add to the page. All Parsli fields are pre-pended with “parsli” which makes them easy to identify.
5. Click “Save” in the upper left corner

Fields & Relationships

11 Items, Sorted by Field Label

[New](#)[Deleted Fields](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CON
parsli Completed Degrees	Completed_Degrees__c	Text(255)	
parsli Completed Levels of Education	Completed_Levels_of_Education__c	Text(255)	
parsli Education History Text	Education_History_Text__c	Long Text Area(32768)	
parsli Last Parse Date	Last_Parse_Date__c	Date/Time	
parsli Last Parse Result	Last_Parse_Result__c	Long Text Area(8192)	
parsli Most Recent Completed Degree	Most_Recent_Completed_Degree__c	Text(255)	
parsli Most Recent Title from Resume	Most_Recent_Title_from_Resume__c	Text(128)	
parsli Most Recent Year of Attendance	Most_Recent_Year_of_Attendance__c	Text(4)	
parsli Resume Text	Resume_Text__c	Long Text Area(131072)	
parsli Skills Text	Skills_Text__c	Long Text Area(8192)	
parsli Years Since Last Attendance	Years_Since_Last_Attendance__c	Formula (Number)	