



User Manual

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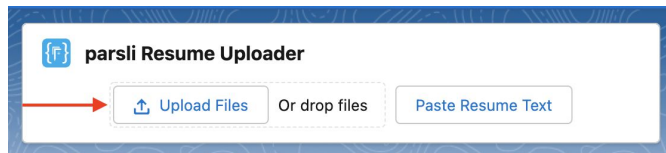
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Parse Resumes



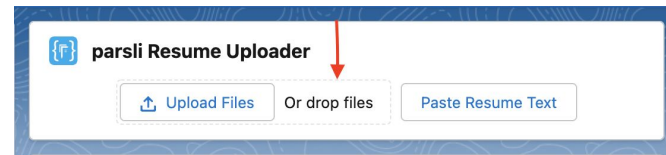
Parse Resumes by file select

This is probably the most typical path you will take. Simply click on “Upload Files” and you will be directed to your files directory. Then, select one or multiple files and click open. Boom! The resumes start processing instantly.



Parse Resume by Drag-and-drop

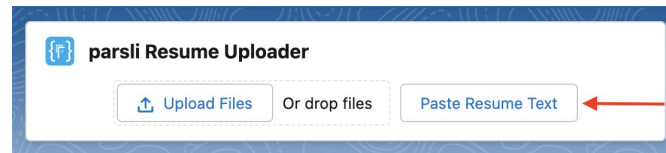
Navigate to your files via directory and select one or many files, then drag those files onto the “Upload Files” button area on the parser (this works the same whether you are using the utility bar, home page, or contact page).



Pro Tip: In Chrome, you can drag and drop downloaded files from the bar on the bottom of the page. This is especially useful when you download a LinkedIn profile or any other web-based resume/profile source.

Parse Resumes by Copy/Paste

Simply copy the resume text and click the Paste Resume Text button. Paste the text into the modal window and click parse.





Parsing and Resume Workflows

Handling Duplicates

We want to be really clear about this, because it can be confusing!

There are two steps Parsli runs through to handle duplicates:

First, Parsli checks if the email matches with a current Candidate.

If there is a single matching Candidate it updates that Candidate record and adds the resume to the record. Simple. Automatic.

Second, Parsli uses existing duplicate rules to id potential duplicates.

In this case, we tell you who the duplicate rule identified, but then we let you investigate the duplicate to determine which person should be updated.

The screenshot shows the 'parsli Resume Uploader' interface. At the top, there are three options: 'Upload Files' (with an upload icon), 'Or drop files', and 'Paste Resume Text'. Below these is a blue progress bar. The main section is titled 'Duplicates Found! Please select the correct record to update.' and contains three radio button options: 'Ted Mctesteam' (selected), 'Ted Mctesteam', and 'None of the Above - Create New'. A 'Save' button is located at the bottom right.



Parsing and Resume Workflows

Handling Duplicates Continued

How to investigate those duplicates found:

First, Use your cursor to hover over a name

In the list of names use your cursor to hover over, you will see a preview panel with details about the person.

These are configurable fields, so you can choose what fields will give you the details you need to make the best decision.

The screenshot shows the 'parsli Resume Uploader' interface. At the top, there are three buttons: 'Upload Files' (with a file icon), 'Or drop files', and 'Paste Resume Text'. Below these is a blue horizontal bar. The main content area displays the message 'Duplicates Found! Please select the correct record to update.' followed by two radio buttons. The first radio button is selected and is next to the text 'Ted Mctesteam'. A modal window titled 'Candidate Details' is open, showing the following fields: 'Name' (Ted Mctesteam), 'Work Email' (empty), and 'TestEmail' (ted.mctesteam@aol.com). On the left side of the modal, the word 'Assistant' is visible.

Second, If you want to update information on a duplicate.

In the list of names click the radio button next to the one you want to update and click save.

Third, If you want to Create a New record.

In the list of names click the radio button next to None of the Above - Create New and click save.

The screenshot shows the 'parsli Resume Uploader' interface. At the top, there are three buttons: 'Upload Files' (with a file icon), 'Or drop files', and 'Paste Resume Text'. Below these is a blue horizontal bar. The main content area displays the message 'Duplicates Found! Please select the correct record to update.' followed by two radio buttons. The first radio button is selected and is next to the text 'Ted Mctesteam'. The second radio button is next to the text 'None of the Above - Create New'. At the bottom right, there is a 'Save' button.

Parsing and Resume Workflows

Reviewing Parse Results



After you parse in resumes (regardless of the method) you can review the resume parse results by going to the “Resume Parse Results” tab, or you can click on the “Candidate successfully created!” link in the parser dialogue box after the parsing completes.

 **parsli Resume Uploader**

Upload Files

Or drop files

Paste Resume Text

Candidate April Showers successfully created!

Candidate creation was successful but the parser returned some warnings:

- Just so you know, education data was not parsed, parsed incompletely, or is missing. Education history may be inaccurate since we couldn't grab all the education data.

Resume Parse Results							
All Resume Parse Results							
50+ items • Sorted by Created Date • Filtered by All resume parse results • Updated a few seconds ago							
New Import Change Owner Printable View							
Search this list...							
	Resume Parse Re...	Source	Candidate	Status	Message	Created Date	
1	☐ a0321000005h8B	None Selected	April Showers	Success with Warnings	Just so you know, education data was not parsed, parsed incompletely, or is missing. Education history may be in...	9/2/2022, 8:53 AM	
2	☐ a0321000005hGN8	None Selected	Tabitha Floom...	Success		9/1/2022, 11:56 A...	
3	☐ a0321000005hGN3	None Selected		Duplicate Records Fou...	Duplicates Found! Review the records below and parse the resume from the correct record.Tabitha FloomeyTabith...	9/1/2022, 11:56 A...	

Viewer

Resume Access and Selection



Select the resume you want to show up in the viewer by clicking the dropdown menu and selecting the file.

The screenshot shows the 'parsli File Viewer' interface. At the top, there is a header with the Parsli logo and the text 'parsli File Viewer'. Below this, there is a section titled 'Select File'. Inside this section, there is a dropdown menu that currently displays 'resume_2021-05-28_Profile (20).pdf'. To the right of the dropdown menu is a small square button with a circular arrow icon. Below the dropdown menu, there is a list of files, with the first item being '✓ resume_2021-05-28_Profile (20).pdf'.

Select “Set as Primary” if you want the currently viewed resume to show up every time you visit the candidate’s page.

Note: By default the viewer will show the most recent created date.

The screenshot shows the 'parsli File Viewer' interface. At the top, there is a header with the Parsli logo and the text 'parsli File Viewer'. Below this, there is a section titled 'Select File'. Inside this section, there is a text input field that contains 'resume_2021-05-28_Profile (20).pdf'. Below the text input field, there is a checkbox labeled 'Set as Primary', which is currently checked.

Viewer

Keyword Search on Resume



All resumes are fully text searchable.

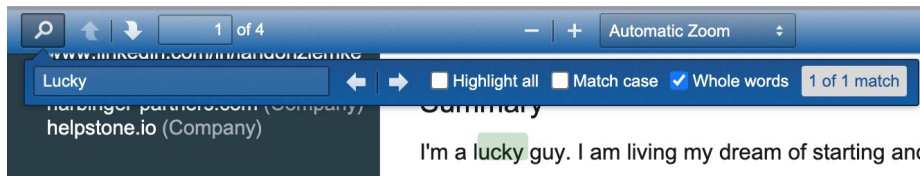
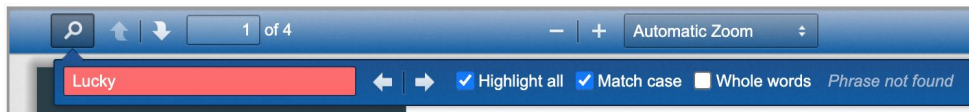
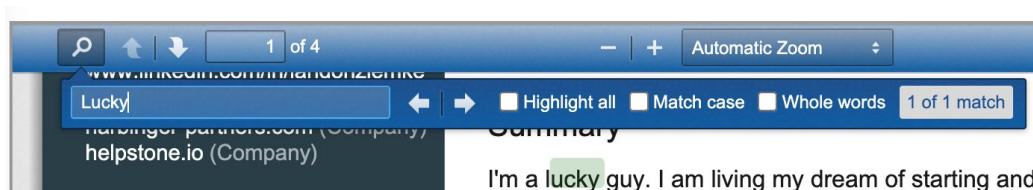
Click on the magnifying glass button to reveal the search menu.

Enter Keyword to highlight keywords on the resumes. By default it will highlight one keyword result at a time and you can click the  button to scroll through the results.

Select “Highlight All” to highlight all keywords simultaneously.

Select “Match Case” to match based on exact lower and upper case.

Select “Whole Words” to search only on whole words. This is especially useful when searching for acronyms.



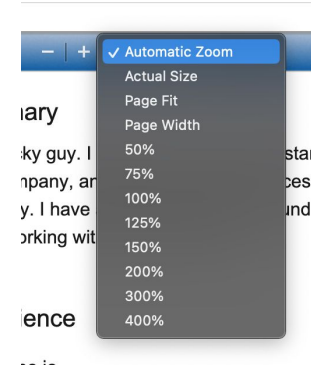


Viewer

Additional Tools and Options

Zoom

- Automatic zoom is the default. This will automatically adjust the size of the resume to conform to the width of your browser window.
- The rest of the settings are self explanatory. The only thing to be aware of is that any setting you choose will be applied to all resumes you view, regardless of which record you use to set the zoom level.



Printing: Click the button that looks like a printer to print. I know. It's confusing.



Downloading Resume: Click the button that looks like a download button to download.



Click the hamburger button to access additional edit tools: Go to Last Page, Rotate Clockwise, Rotate Counterclockwise, Text Selection Tool, Hand Tool, Horizontal and Wrapped Scrolling, and Odd/Even Spreads.



Related Workflows

Searching for Candidates

We have designed Parsli to make it easy to search and filter Candidates using native Listviews and the universal search. Here are some suggested best practices.

Universal Search

The search bar at the top of Salesforce is great for *quick searches* where you are looking for a specific record. It's not ideal for running Candidate searches where you want to work through a list of candidates and take action on them in mass.

Contact Listview Search and Filtering

If you want to create a *curated list of candidates to call, email, or review*, use Contact listview search and filtering. This will allow you to save the list after you enter your search and filter terms, and it will allow you to take mass actions like adding people to Campaigns, sending List Emails, and any other custom mass action that is set up in your organization.

IMPORTANT! Listviews must have less than 2000 records in them to be fully searchable. If you listview has more than 2000 records, use filtering to reduce the total record count.

Field Name	Searchable on Contact Listview	Filterable on Contact Listview
First Name	☒	☒
Last Name	☒	☒
AccountId	☐	☒
RecordTypeId (if defined)	☐	☒
Email	☒	☒
Phone	☐	☒
MobilePhone	☐	☒
MailingStreet	☐	☒
MailingCity	☐	☒
MailingState	☐	☒
MailingPostalCode	☐	☒
MailingCountry	☐	☒
parsli Years Since Last Attendance	☒	☒
parsli Skills Text	☒	☐
parsli Resume Text	☒	☐
parsli Most Recent Year of Attendance	☒	☒
parsli Most Recent Title from Resume	☒	☒
parsli Most Recent Completed Degree	☒	☒
parsli Last Parse Result	☒	☐
parsli Last Parse Date	☒	☒
parsli Education History Text	☒	☐
parsli Completed Levels of Education	☒	☒
parsli Completed Degrees	☒	☒