

Phase 4: Process Automation (Admin)

Recruitment Management System

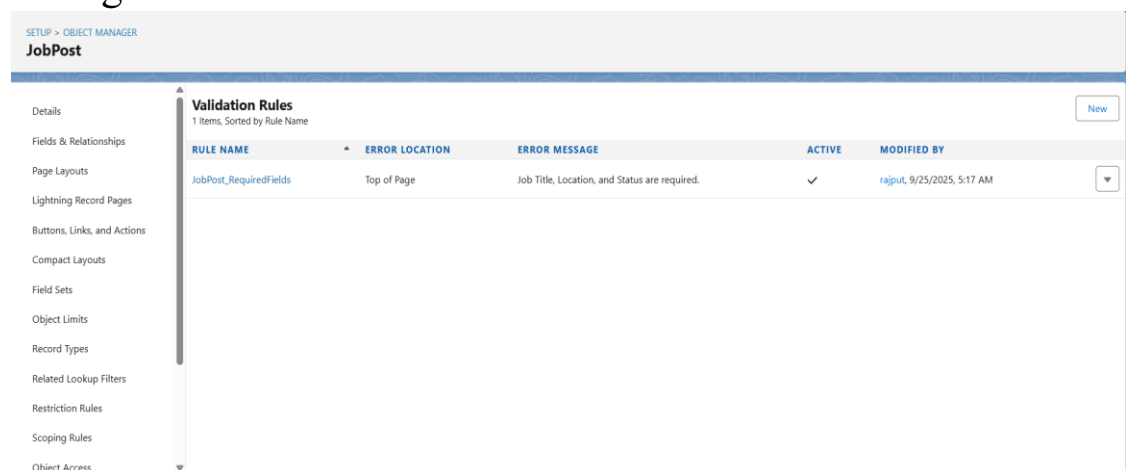
1. Overview

In this phase, Salesforce automation tools were implemented to streamline the recruitment process in RMS. The goal was to:

- ❖ Reduce manual effort
- ❖ Improve communication with candidates and recruiters
- ❖ Ensure consistent **approval workflows** and **notifications**
- ❖ Enforce data quality with **validation rules**

2.Validation Rules

- Validation rules were used to ensure data quality and prevent incorrect or incomplete records.
 - ❖ **JobPost__c**: Mandatory fields must be filled before saving.



SETUP > OBJECT MANAGER					
JobPost					
Details	Validation Rules				
Fields & Relationships	1 Items, Sorted by Rule Name				
Page Layouts					
Lightning Record Pages					
Buttons, Links, and Actions					
Compact Layouts					
Field Sets					
Object Limits					
Record Types					
Related Lookup Filters					
Restriction Rules					
Scoping Rules					
Object Access					
	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
	JobPost_RequiredFields	Top of Page	Job Title, Location, and Status are required.	✓	rajput, 9/25/2025, 5:17 AM

- ❖ **Application__c**: Prevent new applications if Job Opening Last Date < Application Date.

SETUP > OBJECT MANAGER

Application

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Validation Rules

1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Application_Deadline	Top of Page	Cannot apply after the job closing date.	✓	rajput, 9/25/2023 5:48 AM

❖ Interview__c:

- **Feedback Validation:** Feedback must be entered once the interview is completed.
- **Interview Date Validation:** Interview Date must be greater than today's date.

SETUP > OBJECT MANAGER

Interview

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules

Validation Rules

2 Items, Sorted by Rule Name

[New](#)

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	M
Feedback_Validation	Top of Page	Feedback is required once interview is completed.	✓	ra 9/ 5:
Interview_Date_Validation	Top of Page	Interview Date must be today or future.	✓	ra 9/ 5:

2. Approval Processes

❖ JobPost__c

- Recruiter cannot post a job directly.
- **Approval Request → HR Manager.**
- Until approved, **Job Status = Inactive.**
- After approval, **Job Status = Active**

The screenshot displays the Salesforce Setup interface for configuring an Approval Process. The left-hand navigation pane is open, showing the 'Setup' menu with 'Home' and 'Object Manager' options. Under 'Feature Settings', 'Marketing', 'Sales', and 'Service' are listed. The 'Process Automation' section is expanded, and 'Approval Processes' is highlighted. The main content area is titled 'Approval Processes' and shows the configuration for 'JobPost: JobPost_Approval'. It includes a 'Process Definition Detail' section with fields for Process Name, Unique Name, Active status, Next Automated Approver, Manager of Record, Description, Entry Criteria, Record Editability, Approval Assignment Email Template, and Initial Submitters. The 'Active' checkbox is unchecked. The 'Entry Criteria' is set to 'JobPost: Status EQUALS Closed'. The 'Record Editability' is set to 'Administrator ONLY'. The 'Initial Submitters' are set to 'JobPost Owner'.

❖ Application Selection (Application__c)

- When candidate is shortlisted, details sent to HR for hiring approval.
- After HR approval, Application Status updates to **Selected**.

3. Flows

❖ Record-Triggered Flows

- **Auto-create Application** when candidate submits details.
- **Update Application Status + Send Notifications** when status changes.



Record-Triggered Flow

Start

Object: **Candidate**

[Edit](#)

Trigger: **A record is created or updated**

Optimize for: **Actions and Related Recor...**

[+ Add Scheduled Paths \(Optional\)](#)

[Open Flow Trigger Explorer for Candid...](#)

Run Immediately

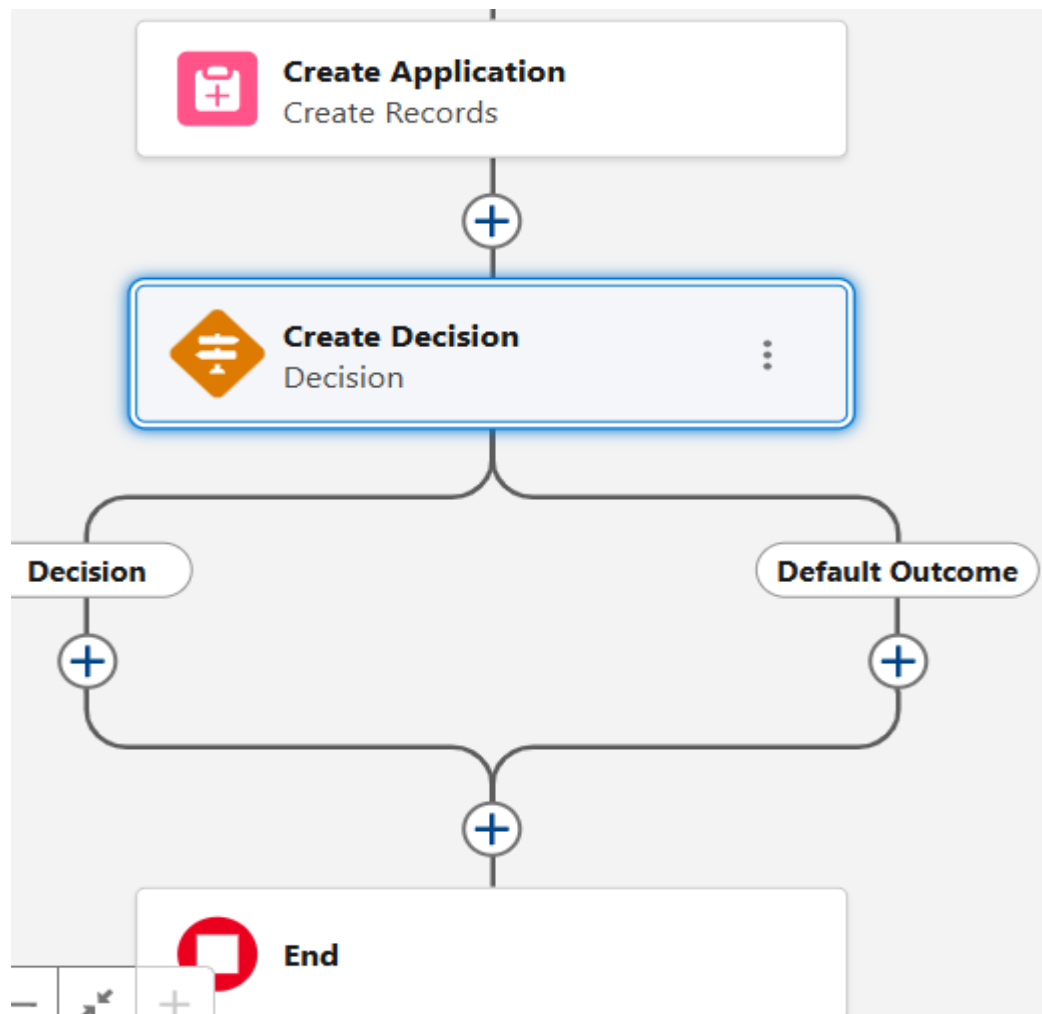


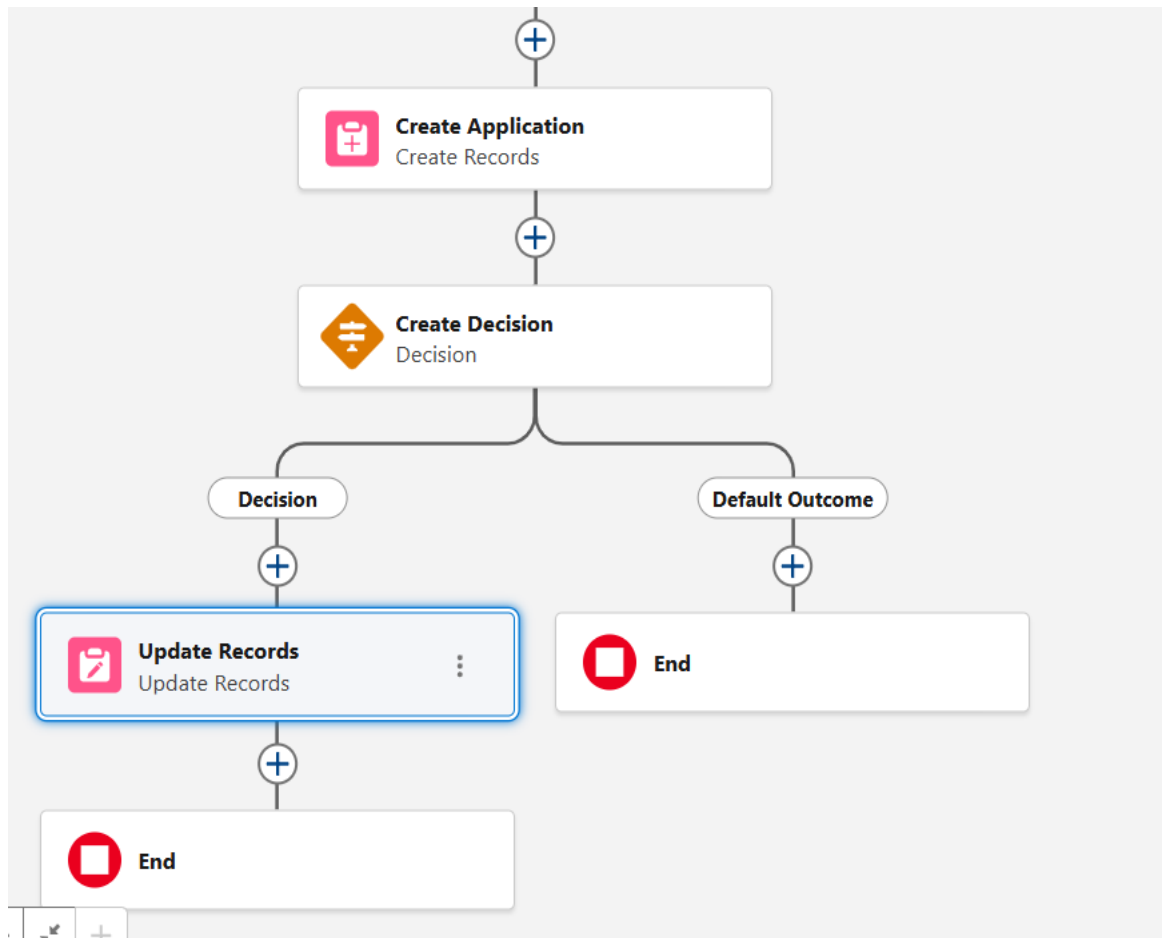
Create Application

Create Records



End



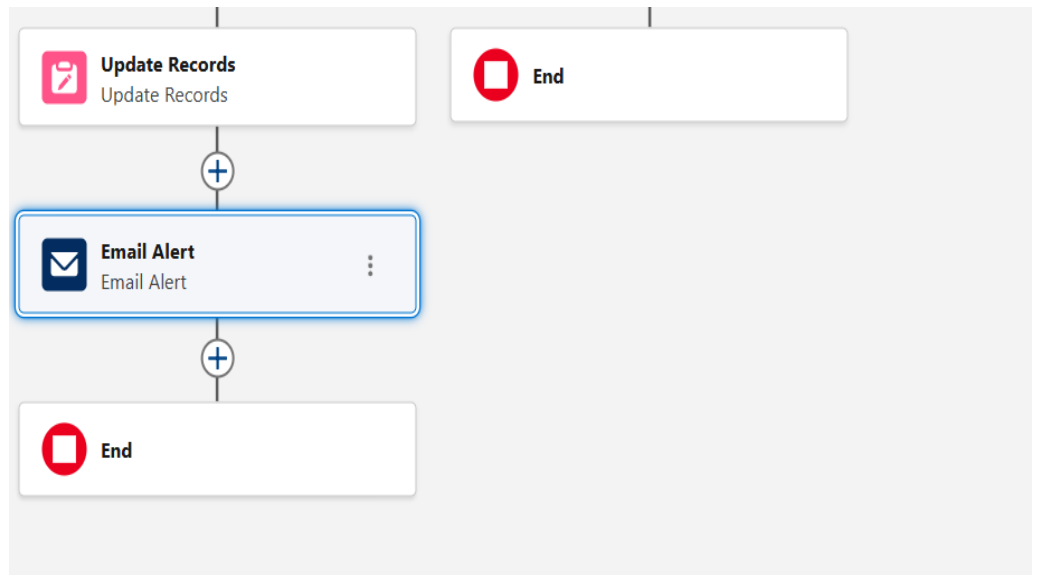


❖ Scheduled Flows

- **Job Posting Auto-Close:** Automatically closes JobPost__c records after the deadline.
- **Interview Reminder:** Sends email/SMS reminders 1 day before the interview to both applicant and recruiter.

4. Email Alerts

- Automated email communications:
 - ❖ **Application Status Updates** → Candidate notified (Shortlisted, Interview Scheduled, Rejected).



6. Field Updates

- Automated **field value changes** using Flows:
 - ❖ Example: Application Status auto-updates when HR approves/rejects.

7. Tasks

- When an Interview is scheduled, a **Task** is auto-created for Recruiter to ensure follow-up.

8. Custom Notifications

- Real-time Salesforce in-app notifications:
 - ❖ **Interview Scheduled** → Recruiter & Candidate notified.
 - ❖ **Application Approved/Rejected** → Notification sent to Candidate.
- Notification mode: Email + In-App.

