Phase 4: Process Automation (Admin)

Recruitment Management System

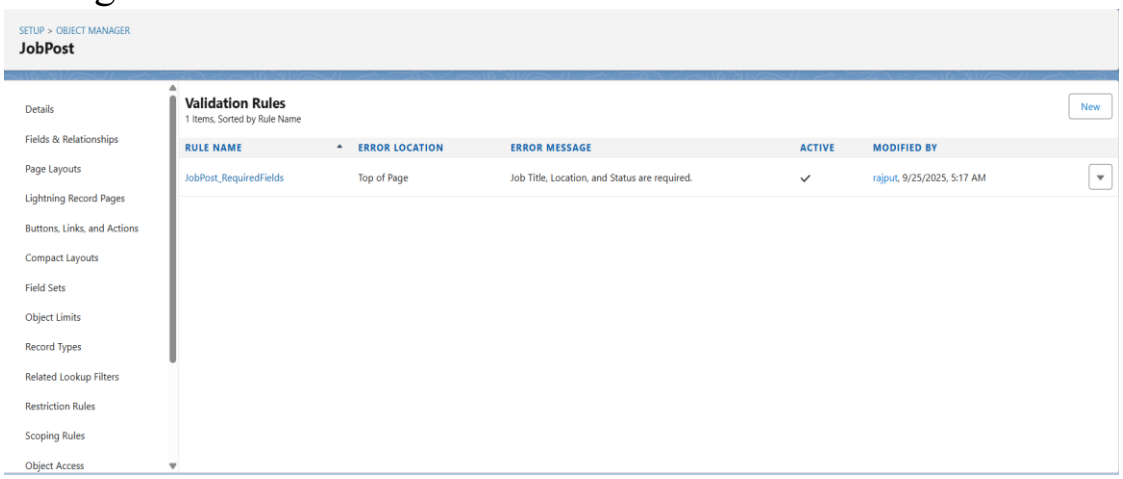
1. Overview

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

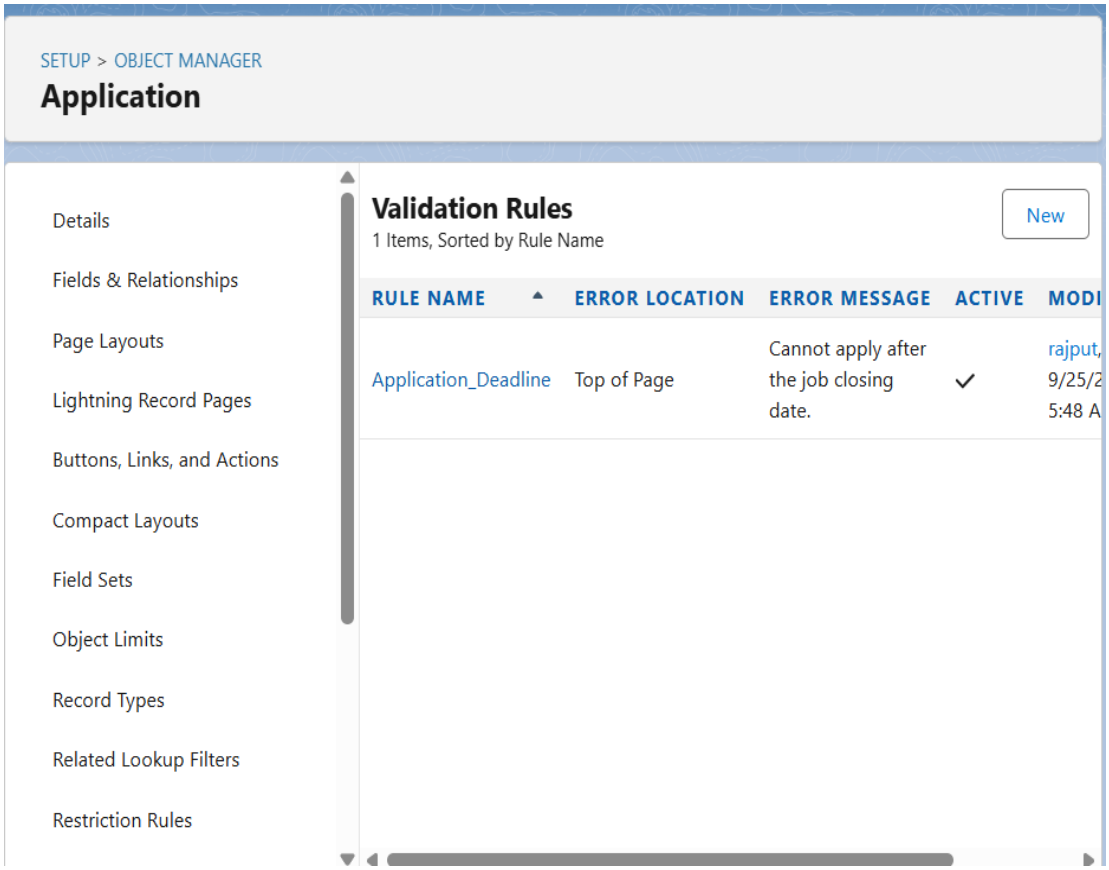
- ❖ Reduce manual effort
- ❖ Improve communication with candidates and recruiters
- ❖ Ensure consistent **approval workflows** and **notifications**
- ❖ Enforce data quality with **validation rules**

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.

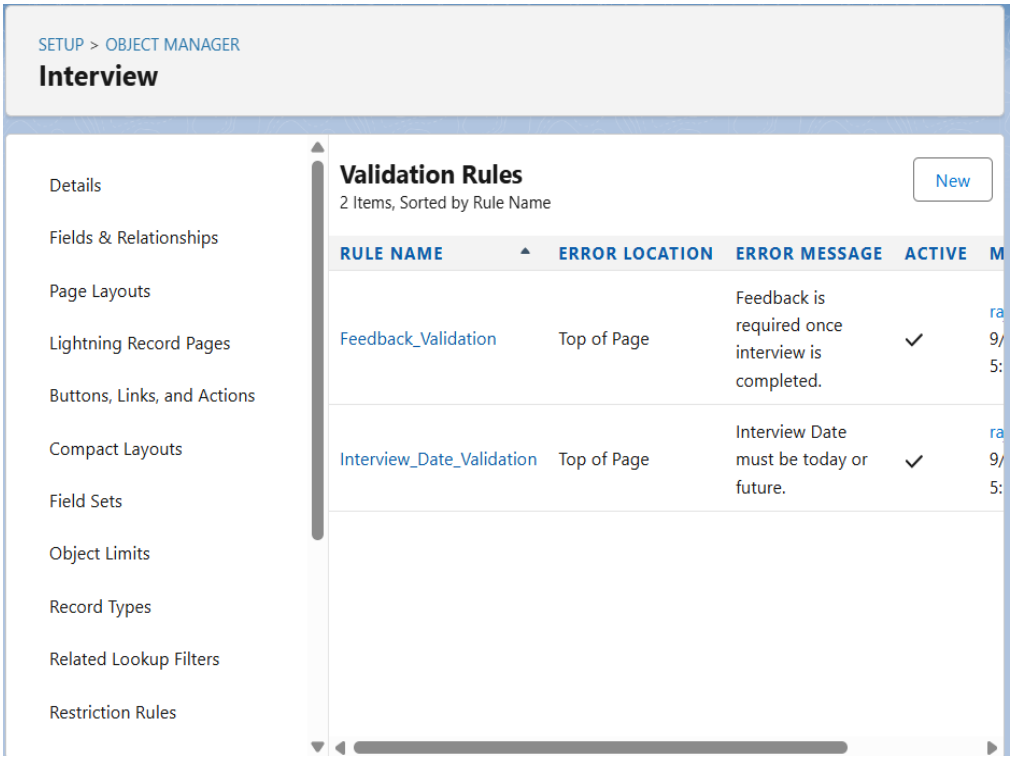


  - ❖ **Application__c:** Prevent new applications if Job Opening Last Date < Application Date.



❖ Interview__c:

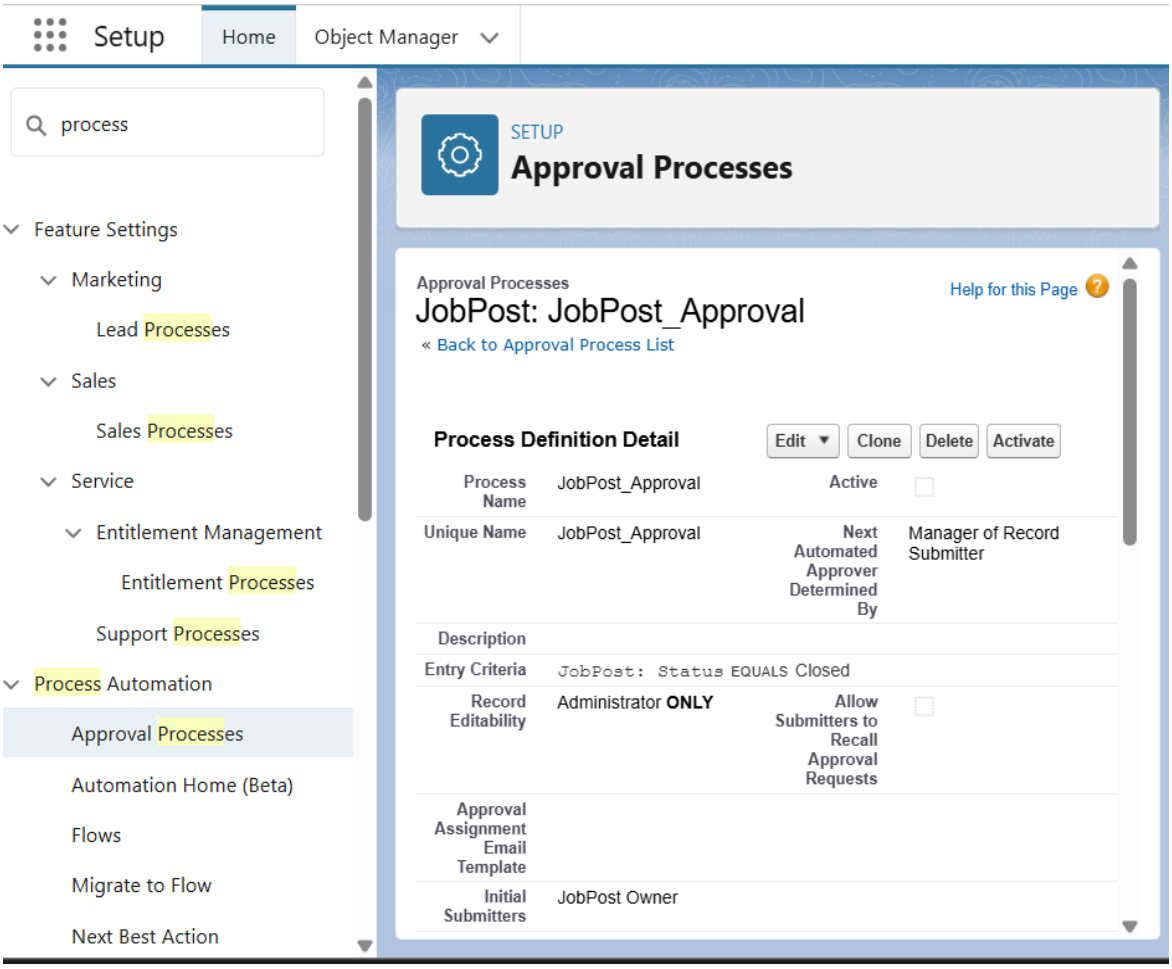
- **Feedback Validation**: Feedback must be entered once the interview is completed.
- **Interview Date Validation**: Interview Date must be greater than today's date.



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**



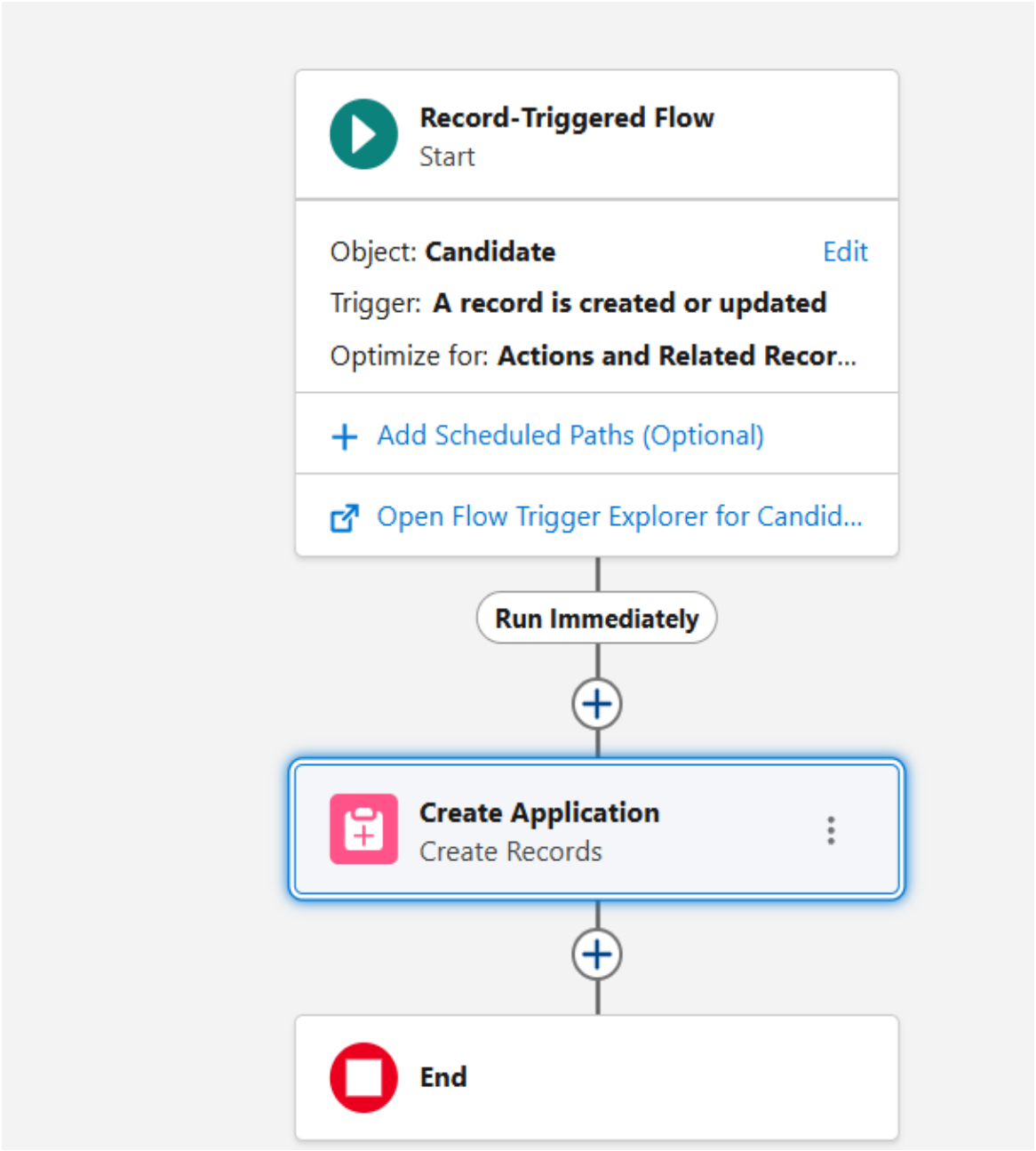
❖ **Application Selection (Application__c)**

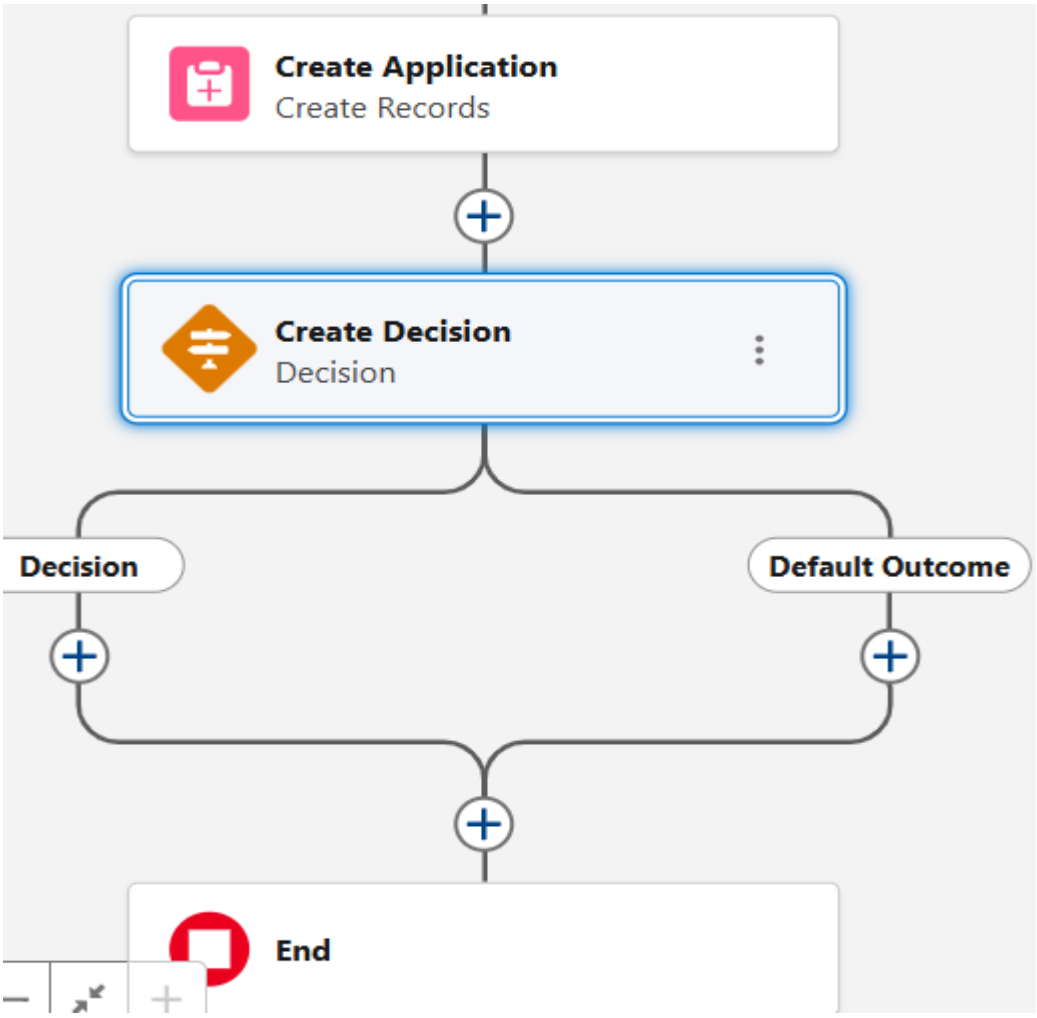
- When candidate is shortlisted, details sent to HR for hiring approval.
- After HR approval, Application Status updates to **Selected**.

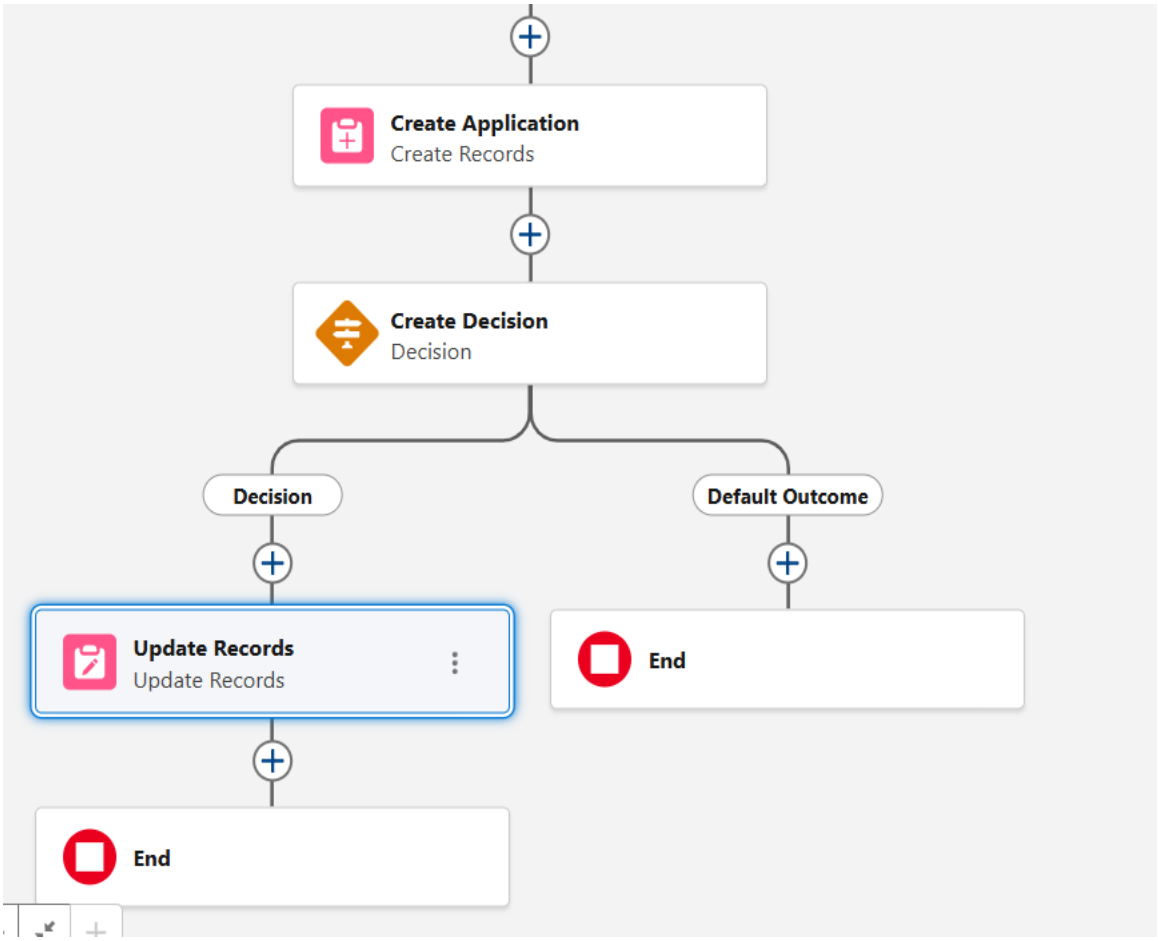
3. Flows

❖ **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


Create Application
Create Records
Create Decision
Decision
Decision
Default Outcome
End

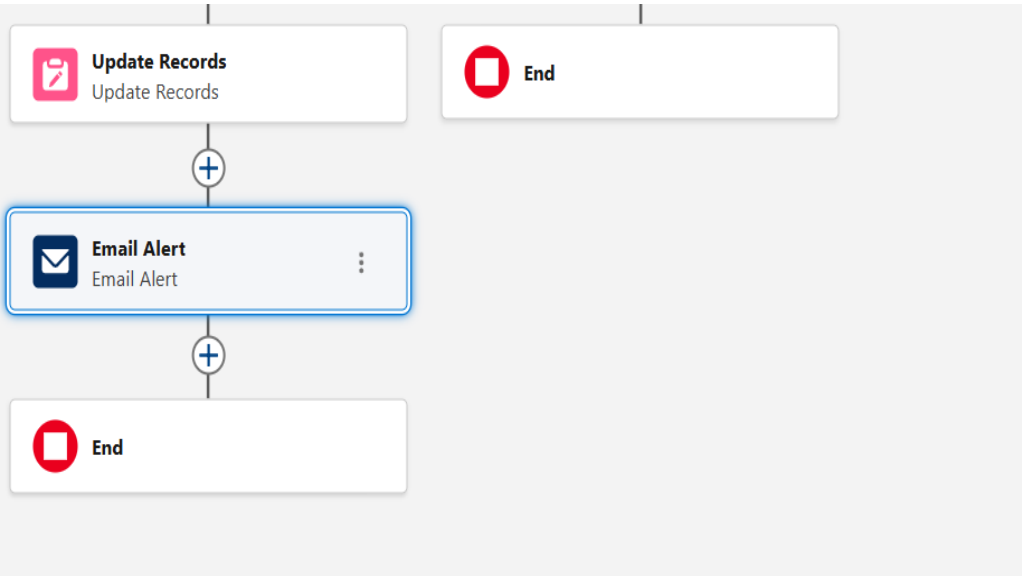


❖ **Scheduled Flows**

- **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

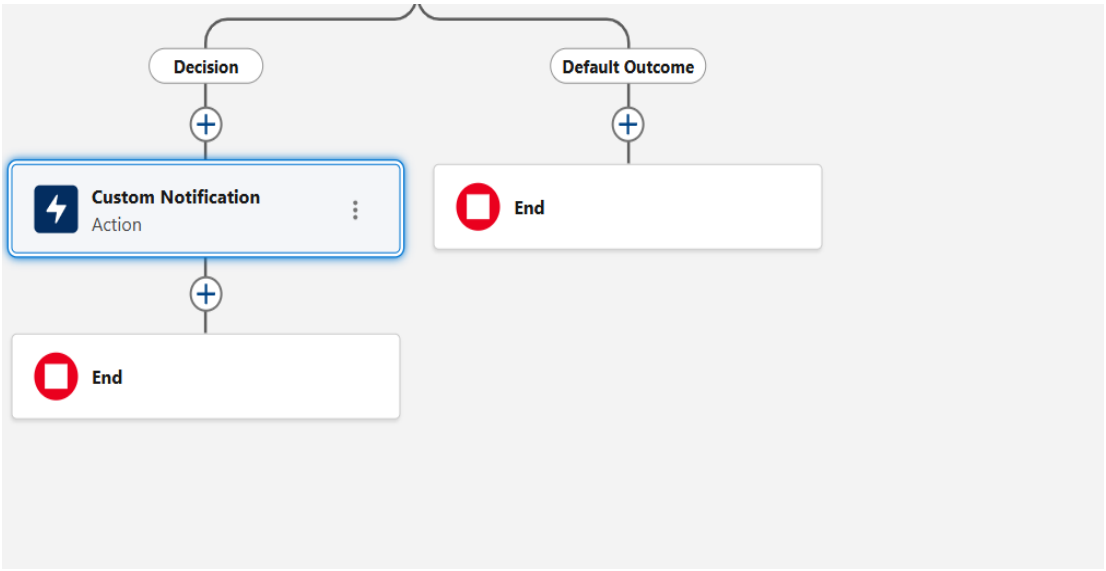
- Automated **field value changes** using Flows:
  - ❖ Example: Application Status auto-updates when HR approves/rejects.

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.


Decision
Default Outcome
Custom Notification
Action
End
End