



Job Application Tracking System



SALESFORCE NAAN MUDHALVAN PROJECT REPORT

Submitted By

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in

INFORMATION TECHNOLOGY

**KNOWLEDGE INSTITUTE OF TECHNOLOGY,
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BONAFIDE CERTIFICATE

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At the outset, we express our heartfelt gratitude to god, who has been our strength to bring this project to light.

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LIST OF ABBREVIATION

CRM	Customer Relationship Management
ESP	Email Service Provider
UI	User Interface
UX	User Experience
OWD	Org - Wide Default
CTA	Call To Action
CSV	Comma - Separated Values
SLA	Service Level Agreement
API	Application Programming Interface
SaaS	Software as a Service
PaaS	Platform as a Service

CHAPTER - 1

INTRODUCTION

Salesforce, a leading cloud-based Customer Relationship Management (CRM) platform, is a pivotal tool for organizations to manage customer data, optimize sales processes, and elevate customer interactions. Its multifaceted features include Sales Cloud, which enhances sales management through lead tracking, opportunity management, and seamless email integration.

Service Cloud focuses on exceptional customer support, featuring case management, knowledgebase development, and multi-channel support. Marketing Cloud empowers businesses with marketing automation, email campaigns, social media engagement, and in-depth analytics. Salesforce's hallmark is its customizability, allowing businesses to tailor the platform to meet specific requirements, while robust integration capabilities facilitate seamless connections with other business applications.

The platform equips businesses with powerful reporting and analytics tools, enabling data-driven decisions and insightful, customized reports and dashboards. It ensures mobile accessibility, enabling users to stay connected and productive while on the move.

Through Salesforce, organizations foster improved customer relationships, increased sales efficiency, and superior customer support. This introduction encapsulates Salesforce's capabilities and benefits, offering a concise overview for your project document, allowing for a better understanding of how the platform can contribute to project goals.

CHAPTER - 2

PROJECT SPECIFICATIONS

2.1 Project Goal:

The goal of this project is to create a CRM (Customer Relationship Management) application tailored for job applicants, designed to streamline the job application process. The application will allow users to track the number of job applications they have submitted and provide easy access to job postings from various recruiters.

The project involves technical components such as creating a developer account, defining custom objects and relationships, configuring tabs, and building an application. Additionally, it covers user management, access control, reporting, and dashboards. The objective is to empower users to efficiently manage their job applications and access relevant job listings within the Salesforce platform.

2.2 Project Scope

- Creation of developer account (Milestone 1):**

This involves setting up a developer account on the Salesforce platform, which will serve as the foundation for building the CRM application.

- Object Creation (Milestone 2):**

Custom objects and relationships will be defined to efficiently store and manage data related to job applications, recruiters, and other relevant information.

- Tabs Creation (Milestone 3):**

Tabs will be configured to provide user-friendly access to different sections functionalities within the CRM application.

- **Create App (Milestone 4):**

The CRM application will be created, and it will serve as the central hub for managing job applications and accessing job postings.

- **Fields & Relationships (Milestone 5):**

Custom fields and relationships will be established to capture specific data attributes related to job applications and recruiters.

- **Profile (Milestone 6):**

User profiles will be configured to define access permissions and roles within the application.

- **Role and Role Hierarchy (Milestone 7):**

Role-based access control will be set up to determine who can view and edit specific data within the CRM..

- **Users (Milestone 8):**

User management will involve adding and configuring user accounts, specifying their roles and access levels.

- **Sharing Rules (Milestone 9):**

Sharing rules will be defined to ensure that users can appropriately share and access data based on predefined criteria.

- **User Adoption (Milestone 10):**

Strategies and tools will be implemented to encourage user adoption and make the application user-friendly

- **Reports (Milestone 11):**

Custom reports will be created to track and analyse job application data, providing valuable insights for users.

- **Dashboards (Milestone 12):**

Dashboards will be designed to display key performance indicators and visual summaries of application data.

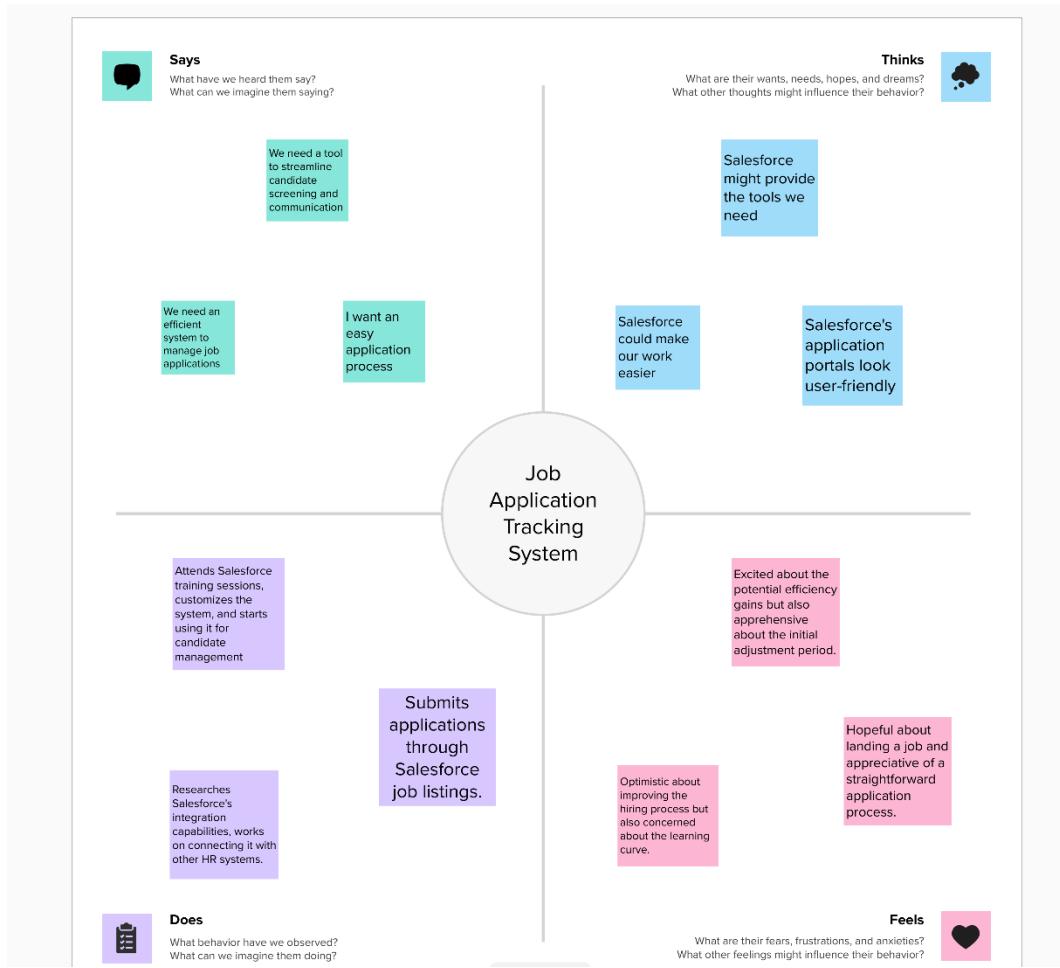
2.3 Problem Statement Definition :

Problem Statement (PS)	I am (Student)	I'm trying to	But	Because	Which makes me feel
PS	Student	Creating a comprehensive Job Application Tracking System using Salesforce to streamline the recruitment process, enhance communication, and improve overall efficiency for HR professionals, job applicants, and hiring managers.	Developing a user-friendly Job Application Tracking System using Salesforce to automate administrative processes, manage applicant data, and facilitate seamless communication between HR professionals, job applicants, and hiring managers.	Developing a Job Application Tracking System using Salesforce to simplify recruitment processes, facilitate better communication, and enhance HR operations for improved hiring outcomes and stakeholder satisfaction.	Developing a user-friendly Job Application Tracking System using Salesforce to provide a seamless and empowering experience for all stakeholders, fostering a sense of ease and satisfaction throughout the recruitment process.

2.3 Empathy Map Canvas:

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.



2.3 Ideation & Brainstorming:

Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other rich amount of creative solutions.

Step-1: Team Gathering, Collaboration and Select the Problem Statement:

Template

Before you collaborate

A little bit of preparation goes a long way with this session. It helps what you need to do to get going.

10 minutes

1 Define your problem statement

The problem is bottleneck job applicants tracking in Salesforce, leading to communication gaps and hampering data-driven hiring. A streamlined, integrated solution is required to enhance our processes, promote collaboration, and enable informed, timely hiring decisions.

5 minutes

Key rules of brainstorming

To ensure creativity and productivity:

- Stay in topic.
- Encourage wild ideas.
- Delay judgments.
- Listen to others.
- Go for quantity.
- Postpone the visual.

Step-2: Brainstorm, Idea Listing and Grouping:

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

⌚ 10 minutes

3

Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and break it up into smaller sub-groups.

⌚ 20 minutes

Person 1

Integration with Email: Leverage Salesforce with email systems to automatically log and track email communication with applicants, ensuring a complete and accessible history of correspondence.

Workflow Automation: Utilize Salesforce's Workflow Rules and Process Builder to automate various stages of the applicant tracking process, such as sending email notifications, updating application status, and triggering reminders for follow-ups.

Person 2

Reports and Dashboards: Develop reports and dashboards to monitor key metrics, including the number of applications received, application sources, and the time taken to move applicants through various stages of the hiring process.

Collaboration Tools: Leverage Salesforce Chatter or a similar tool to facilitate communication and collaboration among HR team members, enabling them to discuss applications, share feedback, and coordinate interviews efficiently.

The Innovators
• This group's focus is on leveraging advanced Salesforce features like AI-driven candidate assessment and predictive analytics to streamline the job application process.

The User-Centric Team
• Prioritizing the user experience, this group aims to create an intuitive, mobile-friendly interface for both applicants and HR professionals.

Person 3

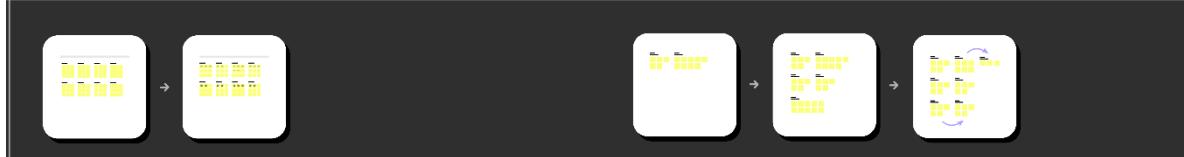
Analytics and AI: Leverage Salesforce Analytics and Einstein Analytics to gain deeper insights into hiring data, identify trends, and make data-driven decisions.

User Training and Support: Provide comprehensive training and support for users to ensure they can effectively utilize the system's capabilities.

Person 4

Compliance and Regulations: Stay updated on relevant labor laws and regulations to ensure the system's compliance with legal requirements.

Data Quality and Cleanup: Regularly perform data quality checks and cleanup to maintain accurate and up-to-date applicant information.



Step-3: Idea Prioritization:

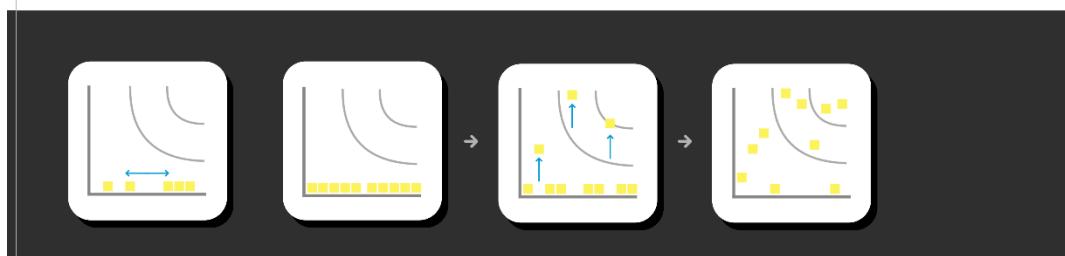
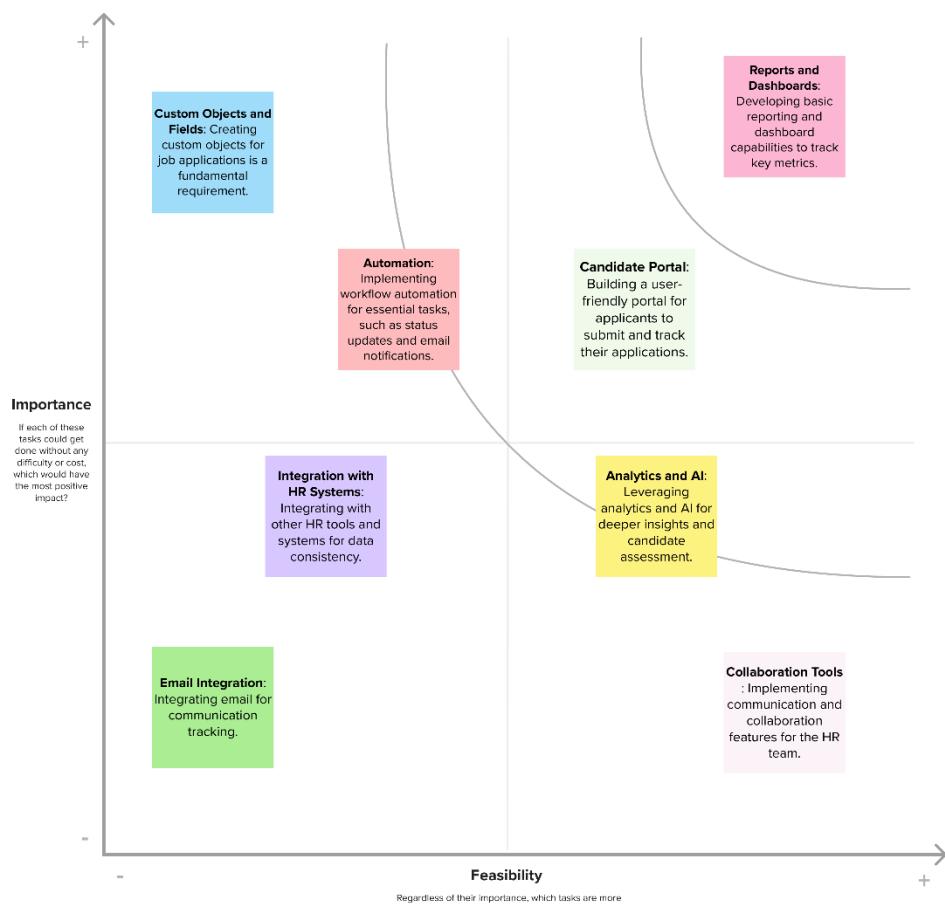
4

Prioritize

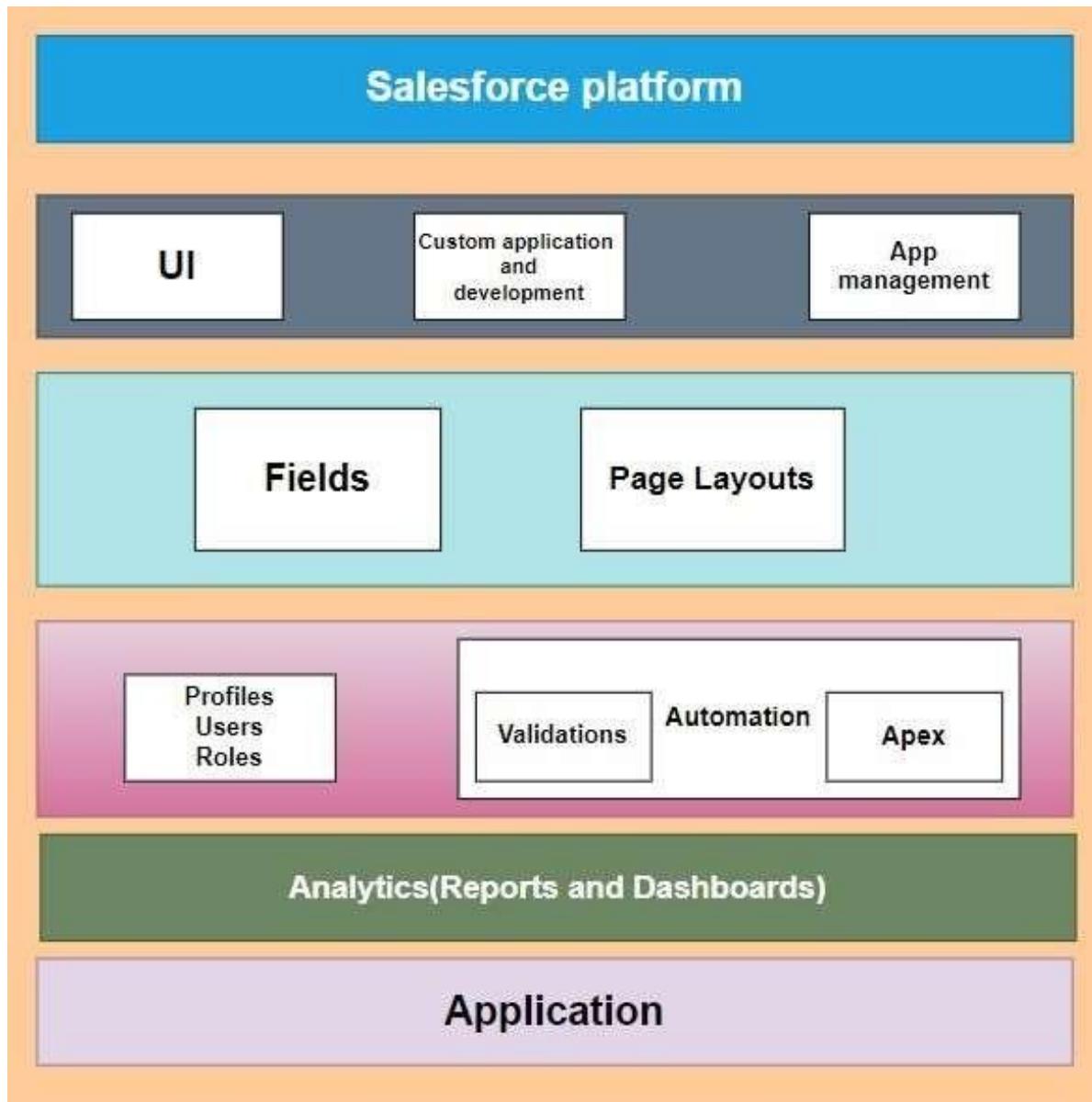
Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

⌚ 20 minutes

TIP
Participants can use their cursors to point at where sticky notes should go on the grid. The facilitator can confirm the spot by using the laser pointer holding the **H** key on the keyboard.



2.3 Technical Requirements



2.3 Functional Requirements

- **User Registration and Authentication:** Users should be able to create accounts with unique usernames and passwords. User authentication and authorization should be implemented to ensure data security.
- **Dashboard:** Users should have a personalized dashboard displaying key metrics such as the number of job applications submitted and the status of each application.
- **Job Application Tracking:** Users should be able to record details of each job application, including the job title, company, date applied, application status, and any related notes. Users should be able to filter and search through their job applications.
- **Job Postings:** Job postings from various recruiters should be accessible within the application. Users should be able to view details of job postings, such as job descriptions, qualifications, and application deadlines.
- **Custom Objects and Relationships:** Custom objects for job applications, job postings, and recruiters should be defined with appropriate relationships. Relationships between applicants and their job applications, as well as between job applications and job postings, should be established.

- **Profile Management:** Users should have the ability to edit their profiles and update personal information. Profiles should include user-specific settings and preferences.
- **Role-Based Access Control:** Access permissions should be defined based on user roles (e.g., applicant, recruiter). Users should only have access to data and features relevant to their roles.
- **User Management:** Administrators should be able to add, modify, or deactivate user accounts. User roles and permissions should be customizable.
- **Sharing Rules:** Sharing rules should be configured to allow data sharing based on predefined criteria, ensuring privacy and data access control.
- **Reporting:** Users should be able to generate custom reports based on their job application data. Standard reports and report templates should be available for common use cases.
- **Notifications and Reminders:** Users should receive notifications and reminders for application deadlines, interview schedules, and other important events. Notifications can be delivered via email or within the application.

- **Integration with External Platforms:** Integration with job search platforms or websites to import job postings automatically. Integration with email services to track application-related correspondence.
- **Data Import and Export:** Users should have the capability to import and export their application data for backup or transfer purposes.
- **User Adoption Features:** Onboarding guides, tutorials, and tooltips to help users navigate and effectively use the system. Feedback mechanisms to collect user suggestions and improve the application.
- **Customization and Configuration:** Administrators should be able to customize the application's appearance, fields, and workflows to suit their organization's needs.
- **Mobile Accessibility:** The application should be accessible on mobile devices to allow users to track job applications on the go.
- **Security and Data Privacy:** Data encryption, secure connections, and compliance with data privacy regulations (e.g., GDPR) should be implemented to protect user data.
- **Scalability:** The system should be scalable to accommodate a growing number of users, job applications, and job postings.
- **Backup and Recovery:** Regular data backups and a disaster recovery plan should be in place to prevent data loss.

CHAPTER - 3

OBJECT CREATION

Objects:

Salesforce objects are database tables that permit you to store Data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types:

1.Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

2.Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

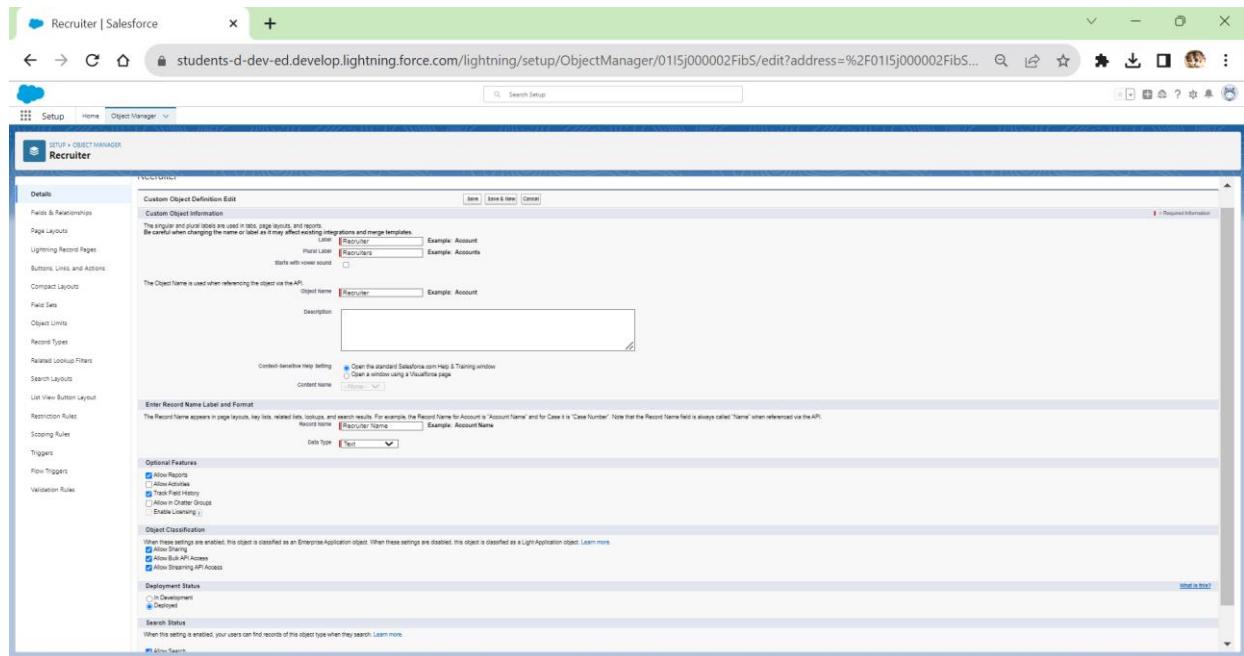
In This Application We Use 4 Custom Objects:

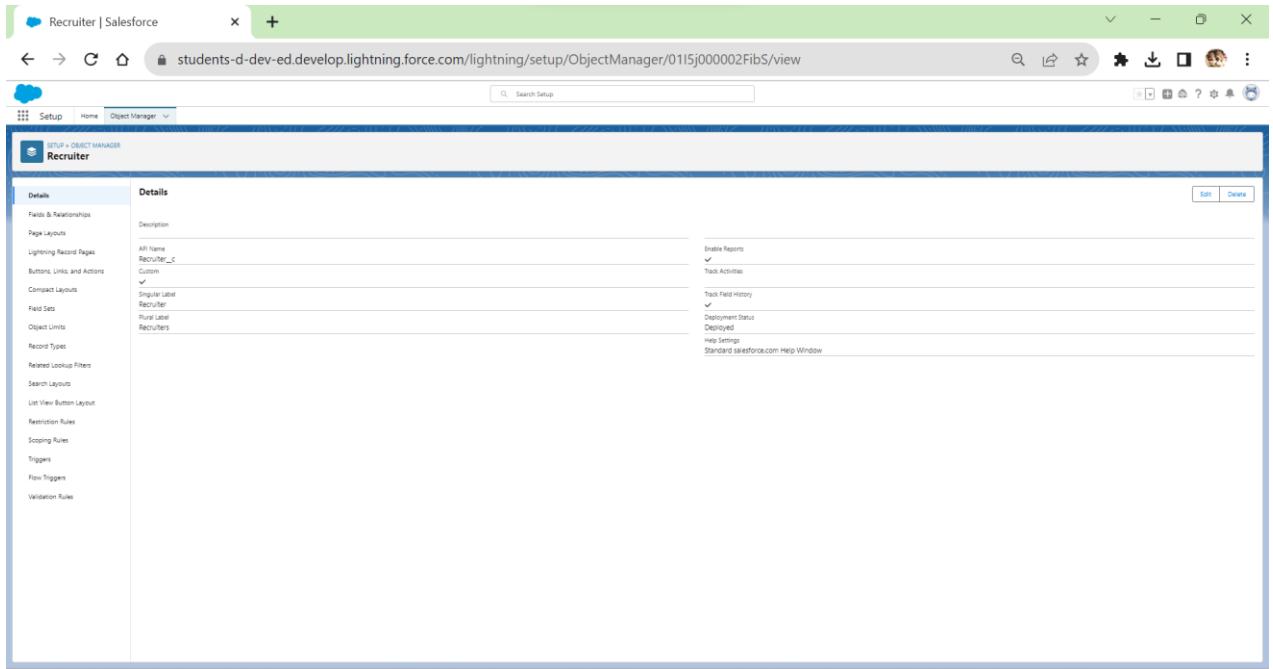
- 1.Recruiter
- 2.Jobs
- 3.Candidate
- 4.Job-Application

1) Create A Custom Object for Recruiter:

- 1.From setup click on object manager.
- 2.Click create, select custom object.
- 3.Fill in the label as " Recruiter ".
- 4.Fill in the plural label as " Recruiters ".
- 5.Record name: " Recruiter Name "

6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

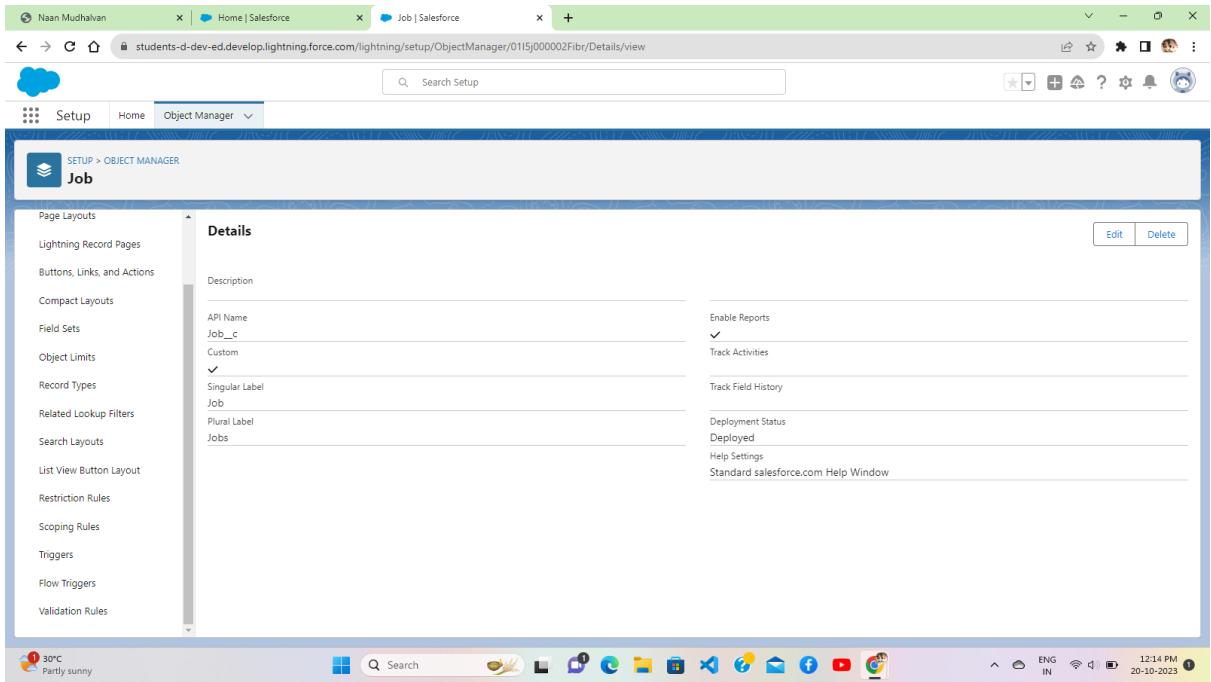




11. Leave everything else as is, and click Save.

2) Creation of Jobs Object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: Job
6. Plural Label: Jobs
7. Record Name: Job Name
8. Select the data type as "Text".
9. Check the Allow Reports checkbox
10. Check the Allow Search checkbox
11. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout



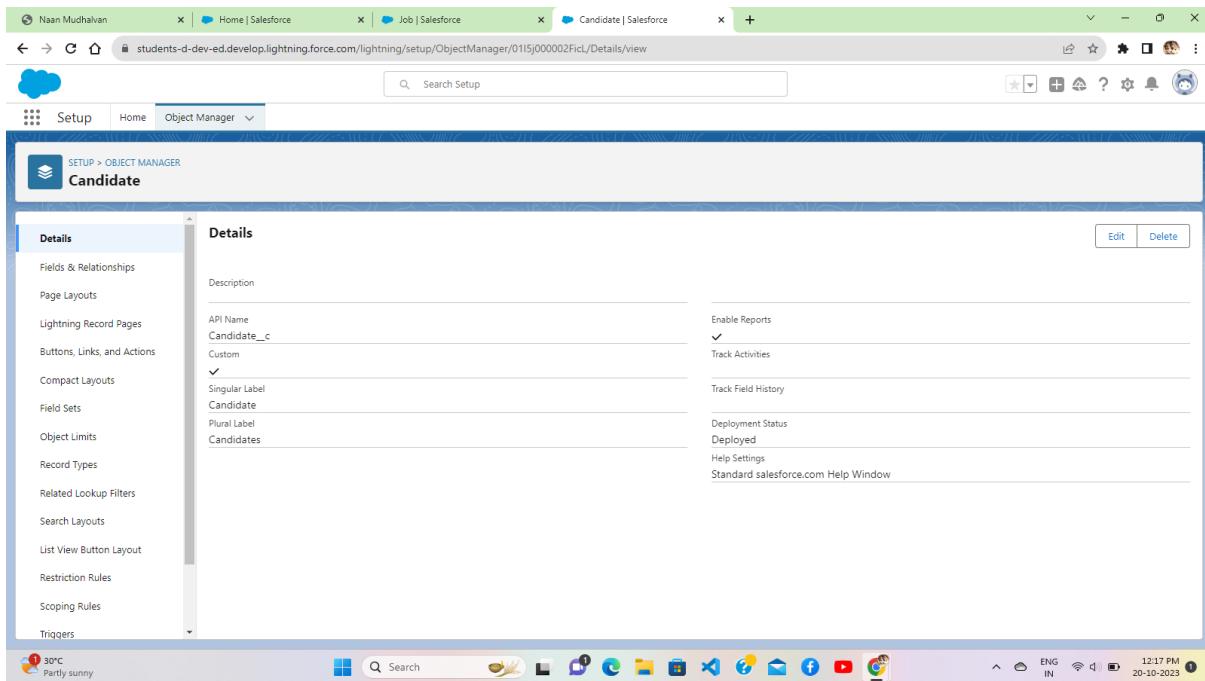
12. Click Save.

3) Creation of Candidate Object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
 5. Label: Candidate
 6. Plural Label: Candidates
 7. Record Name: Candidates Name
 8. Select the data type as "Text".
 9. Check the Allow Reports checkbox.
 10. Check the Allow Search checkbox.

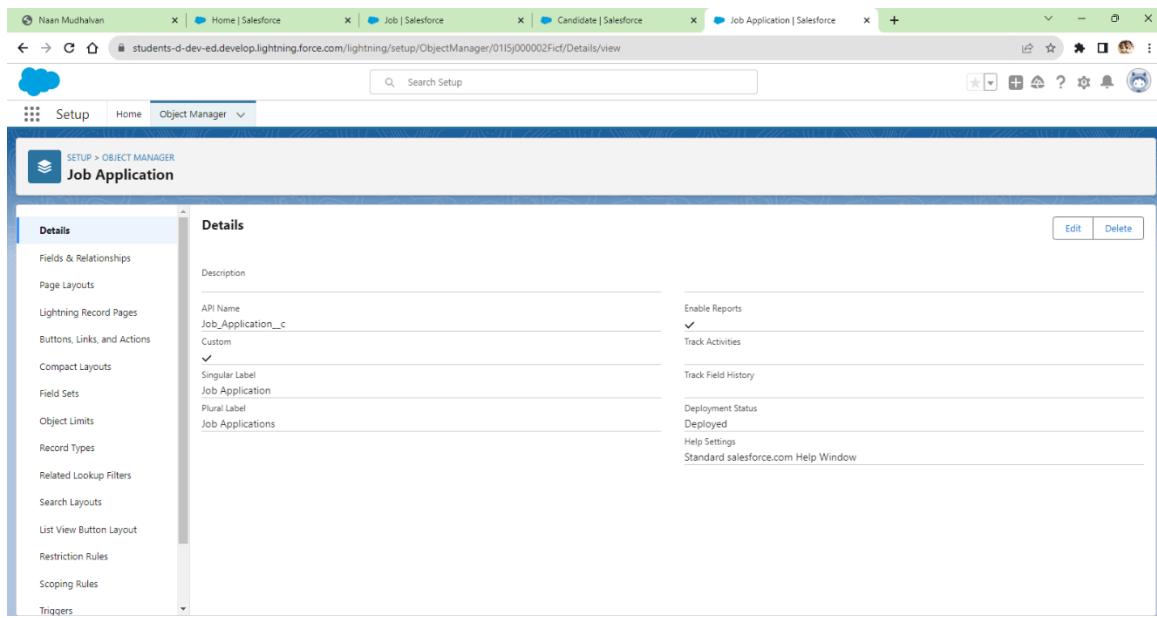
11. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

12. Click Save.



4)Creation of Job Application Object

- 1.Click on the gear icon and then select Setup.
- 2.Click on the object manager tab just beside the home tab.
- 3.After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- 4.On the Custom Object Definition page, create the object as follows:
 - 5.Label: Job Application
 - 6.Plural Label: Job Applications
 - 7.Record Name: Job Application Number
 - 8.Select the data type as "Auto Number".



- 9.Under display format enter "JP- {0000}"
- 10.Enter starting number as 1
- 11.Check the Allow Reports checkbox.
- 12.Check the Allow Search checkbox.
- 13.In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
- 14.Click Save.

CHAPTER - 4

TABS:

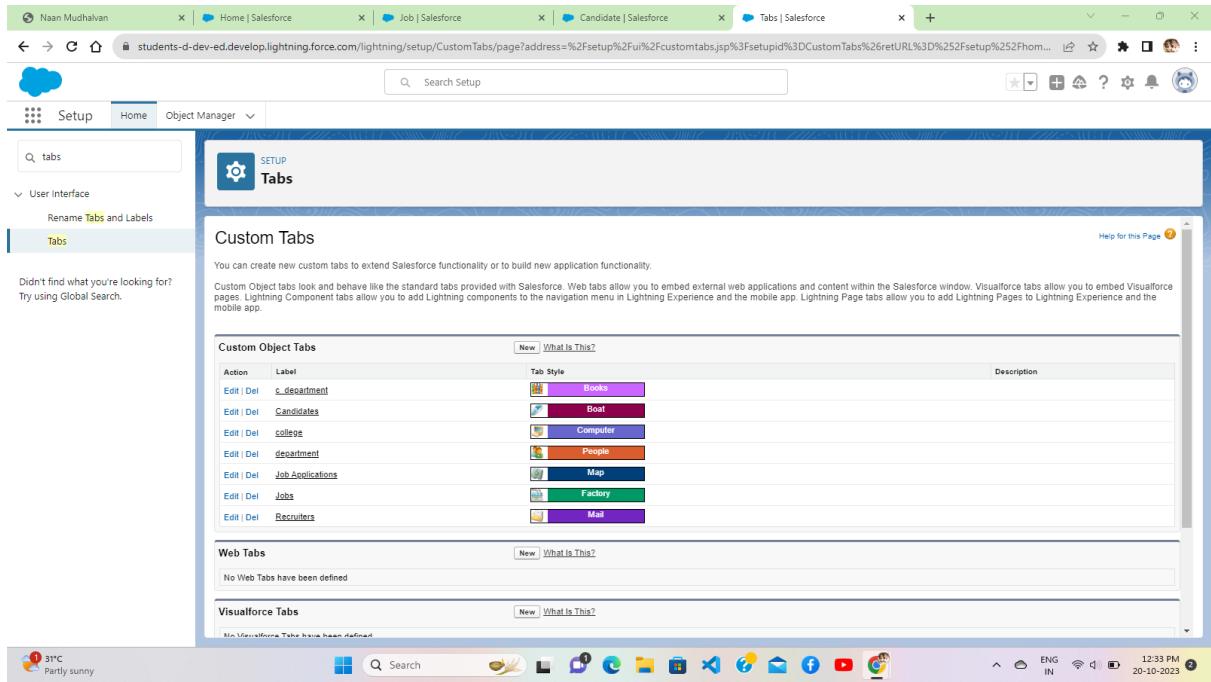
Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

1. **Standard Object Tabs:** Standard object tabs display data related to standard objects.
2. **Custom Object Tabs:** Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.
3. **Web Tabs:** Web Tabs display any external Web-based application or Web page in a Salesforce tab.
4. **Visualforce Tabs:** Visualforce Tabs display data from a Visualforce Page.

1) Creation of Recruiter Tab

1. Now create a custom tab.
2. Click on Home tab, enter Tabs in Quick Find and select Tabs.
Under custom object tabs, click New
3. For Object, select Recruiter.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.



2) Creation of Job Tab

1. Now create a custom tab.
2. Click on Home tab, enter Tabs in Quick Find and select Tabs.
3. Under custom object tabs, click New.
4. For Object, select Job.
5. For Tab Style, select any icon.
6. Leave all defaults as is. Click Next, Next, and Save

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	books	Books	
Edit Del	Candidates	Heart	
Edit Del	colleges	Castle	
Edit Del	departments	Computer	
Edit Del	Job Applications	Bell	
Edit Del	Jobs	Laptop	
Edit Del	Recruiters	Credit card	
Edit Del	Research Proposals	Presenter	
Edit Del	students	Diamond	

3) Creation of Job Tab

1. Now create a custom tab.
2. Click on Home tab, enter Tabs in Quick Find and select Tabs.
3. Under custom object tabs, click New.
4. For Object, select Job.
5. For Tab Style, select any icon.
6. Leave all defaults as is. Click Next, Next, and Save

The screenshot shows the Salesforce Lightning Experience interface. At the top, there's a banner with the text "IT'S BETTER IN LIGHTNING" and "Move to Lightning Experience and give your users a productivity boost." Below the banner, the navigation bar includes "Tell Me More" and "Check Readiness". The main content area is titled "Custom Tabs". It contains a brief description: "You can create new custom tabs to extend Salesforce functionality or to build new application functionality." Below this, there are two sections: "Custom Object Tabs" and "Web Tabs".

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	books	Books	
Edit Del	Candidates	Heart	
Edit Del	colleges	Castle	
Edit Del	departments	Computer	
Edit Del	Job Applications	Bell	
Edit Del	Jobs	Laptop	
Edit Del	Recruiters	Credit card	
Edit Del	Research Proposals	Presenter	
Edit Del	students	Diamond	

Web Tabs

Action	Label	Tab Style	Description
New	What Is This?		

4) Creation of Candidate Tab

1. Now create a custom tab.
2. Click on Home tab, enter Tabs in Quick Find and select Tabs.
3. Under custom object tabs, click New.
4. For Object, select Candidate.
5. For Tab Style, select any icon.
6. Leave all defaults as is. Click Next, Next, and Save

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	books	Books	
Edit Del	Candidates	Heart	✓
Edit Del	colleges	Castle	
Edit Del	departments	Computer	
Edit Del	Job Applications	Bell	
Edit Del	Jobs	Laptop	
Edit Del	Recruiters	Credit card	
Edit Del	Research Proposals	Presenter	
Edit Del	students	Diamond	

Web Tabs

5) Creation of Job Application Tab

1. Now create a custom tab.
2. Click on Home tab, enter Tabs in Quick Find and select Tabs.
3. Under custom object tabs, click New.
4. For Object, select Job Application.
5. For Tab Style, select any icon.
6. Leave all defaults as is. Click Next, Next, and Save.

Quick Find / Search...

[Expand All](#) | [Collapse All](#)

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Salesforce Mobile Quick Start

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Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls

Custom Tabs

[Help for this Page](#)

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	books	Books	
Edit Del	Candidates	Heart	
Edit Del	colleges	Castle	
Edit Del	departments	Computer	
Edit Del	Job Applications	Bell	✓
Edit Del	Jobs	Laptop	
Edit Del	Recruiters	Credit card	
Edit Del	Research Proposals	Presenter	
Edit Del	students	Diamond	

Web Tabs

Action	Label	Tab Style	Description
New	What Is This?		

CHAPTER - 5

LIGHTNING APP:

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

Custom apps: these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

1. Click New Lightning App. Job Application Tracking as the App Name, then click Next
2. Under App Options, leave the default selections and click Next.
3. Under Utility Items, leave as is and click Next.
4. From Available Items, select Recruiters, Jobs, Candidates, Job Application Reports, and Dashboards and move them to Selected Items. Click Next.
5. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
6. To verify your changes, click the App Launcher, type Job Application and select the Job Application app.

The screenshot shows the Salesforce App Manager interface. On the left, a sidebar lists various categories under 'Salesforce Mobile App' and 'Apps'. The 'App Manager' option is selected. The main area displays a table titled 'Lightning Experience App Manager' with 22 items. The columns are: App Name, Developer Name, Description, Last Modified, App Type, and Version. The table lists various Salesforce applications like All Tabs, Analytics Studio, App Launcher, Bolt Solutions, Community, Content, Data Manager, Digital Experiences, Job Application Tracking, Lightning Usage App, Marketing, Platform, Queue Management, Sales, and Sales.

App Name	Developer Name	Description	Last Modified	App...	Ver...
All Tabs	AllTabSet		29/08/2023, 9:32 am	Classic	▼
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	29/08/2023, 9:32 am	Classic	▼
App Launcher	AppLauncher	App Launcher tabs	29/08/2023, 9:32 am	Classic	▼
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	29/08/2023, 9:34 am	Lightning	▼
Community	Community	Salesforce CRM Communities	29/08/2023, 9:32 am	Classic	▼
Content	Content	Salesforce CRM Content	29/08/2023, 9:32 am	Classic	▼
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	29/08/2023, 9:32 am	Lightning	▼
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	29/08/2023, 9:32 am	Lightning	▼
Job Application Tracking	Job_Application_Tracking		20/10/2023, 12:38 pm	Lightning	▼
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	29/08/2023, 9:32 am	Lightning	▼
Marketing	Marketing	Best-in-class on-demand marketing automation	29/08/2023, 9:32 am	Classic	▼
Platform	Platform	The fundamental Lightning Platform	29/08/2023, 9:32 am	Classic	▼
Queue Management	QueueManagement	Create and manage queues for your business.	29/08/2023, 9:32 am	Lightning	▼
Sales	Sales	The world's most popular sales force automation (SFA) solution	29/08/2023, 9:32 am	Classic	▼
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	29/08/2023, 9:32 am	Lightning	▼

CHAPTER - 6

FIELDS AND RELATIONSHIP:

Fields in Salesforce represent what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in salesforce:

Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standardobjects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.

Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

1) Creation of Fields for The Recruiter Objects

1.click the gear icon and select Setup. This launches Setup in a new tab.

2.Click the Object Manager tab next to Home.

3.Select Recruiter.

4.Select Fields & Relationships from the left navigation, and click New

--From the sidebar, click Fields & Relationships. Notice that there are already some fields there. Those are the standard fields.

--Click New to create a custom field.

5.Choose the data type as Auto number, click next

6.Enter field label (Recruiter Number), Display format RN- {0000} Starting number (1) and click next

7.Next, Next and Click save

8.Now let's create the other fields follow above Activity1 steps 1 to 4 and we must choose the data types of the fields carefully

--Select the Text as the Data Type, then click Next. For Field Label, Job Title. Enter Length (20) Click Next, Next, then Save & New.

--Select the Email as the Data Type, then click Next. For Field Label, Email.

9.Click Next, Next, then Save & New.

--Select the phone as the Data Type, then click Next. For Field Label, Phone.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Fields & Relationships' for the 'Job' object. It displays four fields: 'Created By', 'Job Name', 'Last Modified By', and 'Recruiter Name'. The 'Job Name' field is highlighted. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED status. A toolbar at the top provides search, new record, deleted fields, field dependencies, and history tracking options.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Job Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Recruiter Name	Recruiter_Name__c	Master-Detail(Recruiter)		✓

10.Click Next, Next, then Save & New.

2) Creation of Fields for The Job Objects

- 1.Select the Auto number as the Data Type, then click Next.
- 2.For Field Label, enter Job Application Id., Display format (J-{000}) starting number (001) Click Next, Next, then Save & New

The screenshot shows the Salesforce Object Manager interface for the 'Job' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions. The main content area is titled 'Fields & Relationships' and displays four fields: Created By, Job Name, Last Modified By, and Recruiter Name. The 'Job Name' field is highlighted. The interface includes standard Salesforce navigation and search tools at the top, and a taskbar at the bottom.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Job Name	Name	Text(80)		
Last Modified By	LastModifiedBy	Lookup(User)		
Recruiter Name	Recruiter_Name_c	Master-Detail(Recruiter)		

- 3.Select the Text area as the Data Type, then click Next. For FieldLabel, Description.
- 4.Click Next, Next, then Save & New.
- 5.Select the Text as the Data Type, then click Next. For Field Label, enter Location, and length (20) Click Next, Next, then Save & New

3) Creation of Master-Detail Relationship for Job Object

1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.
4. Choose Master-detail Relationship and click Next
5. Choose the related object (Recruiter) and select that object.
6. Enter the label name (Recruiter Name)

The screenshot shows the Salesforce Object Manager interface for the 'Job' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Fields & Relationships' and displays a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The 'Recruiter Name' field is highlighted, showing it is a Master-Detail relationship with the 'Recruiter' object as the controlling field.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Description	Description__c	Text Area(255)		
Job Application Id	Job_Application_Id__c	Auto Number		
Job Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Text(20)		
Recruiter Name	Recruiter_Name__c	Master-Detail(Recruiter)		✓

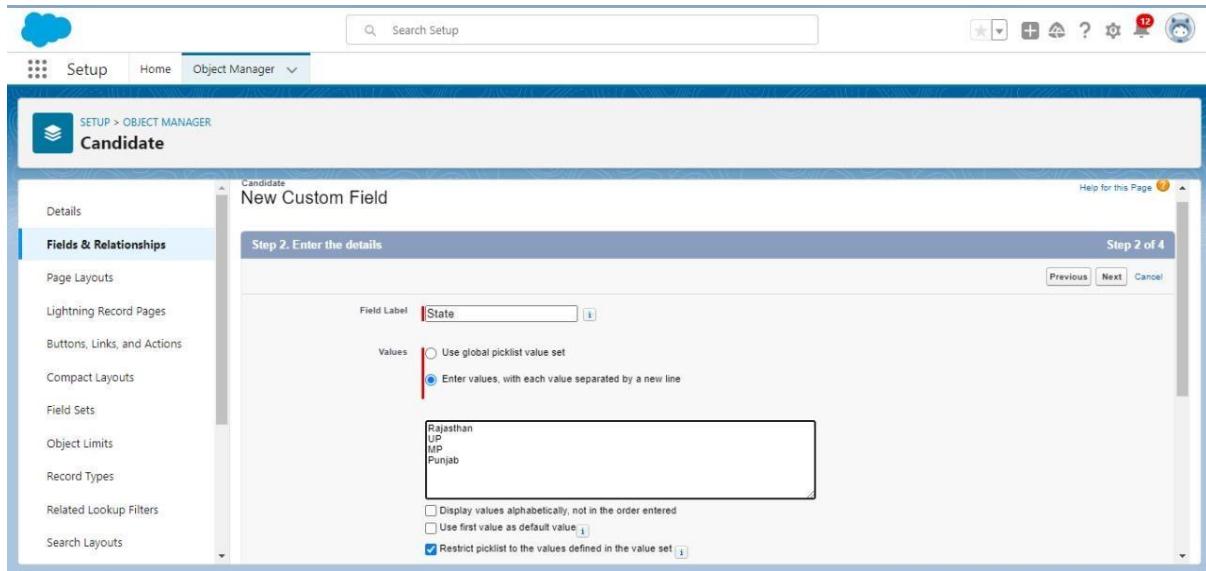
4) Creation of Fields for The Candidate Object

1. Select the Text area as the Data Type, then click Next. For Field Label, Address
2. Click Next, Next, then Save & New.
3. Select the Email as the Data Type, then click Next. For Field Label, enter Email.
4. Click Next, Next, then Save & New.
5. Select the Phone as the Data Type, then click Next. For Field Label, enter Phone.
6. Click Next, Next, then Save & New
7. Select Picklist as the Data Type and click Next. For Field Label enter Education.
8. Select Enter values, with each value separated by a new line and enter these values: Graduation,
9. Post-Graduation. Click Next, Next, then Save & New.
10. Select the Text area as the Data Type, then click Next. For Field Label, enter Skill Set.
11. Click Next, Next, then Save & New

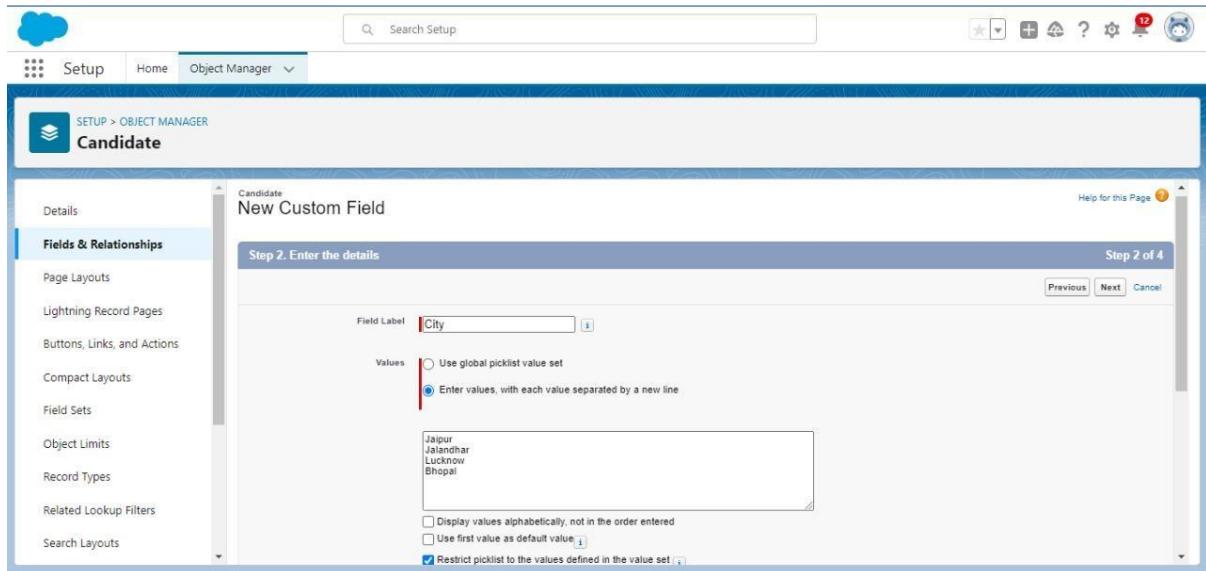
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Candidate Name	Name	Text(80)		✓
City	City__c	Picklist	State	
Created By	CreatedById	Lookup(User)		
Education	Education__c	Picklist		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Phone	Phone__c	Phone		
Skill Set	Skill_Set__c	Text Area(255)		
State	State__c	Picklist		

5) Create Picklist Fields on Candidate Object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, Select candidate Object
4. Now Select Fields and relationships from setup menu of the candidate object.
5. Click new and select Picklist fields next and enter label name (State) and select enter values option
6. (Rajasthan, UP, MP, Punjab), next, next and save.



7. Select Picklist as the Data Type and click Next. For Field Label Name City and Select Enter values, with each value separated by a new line and enter these values (JS), next, next and Save.



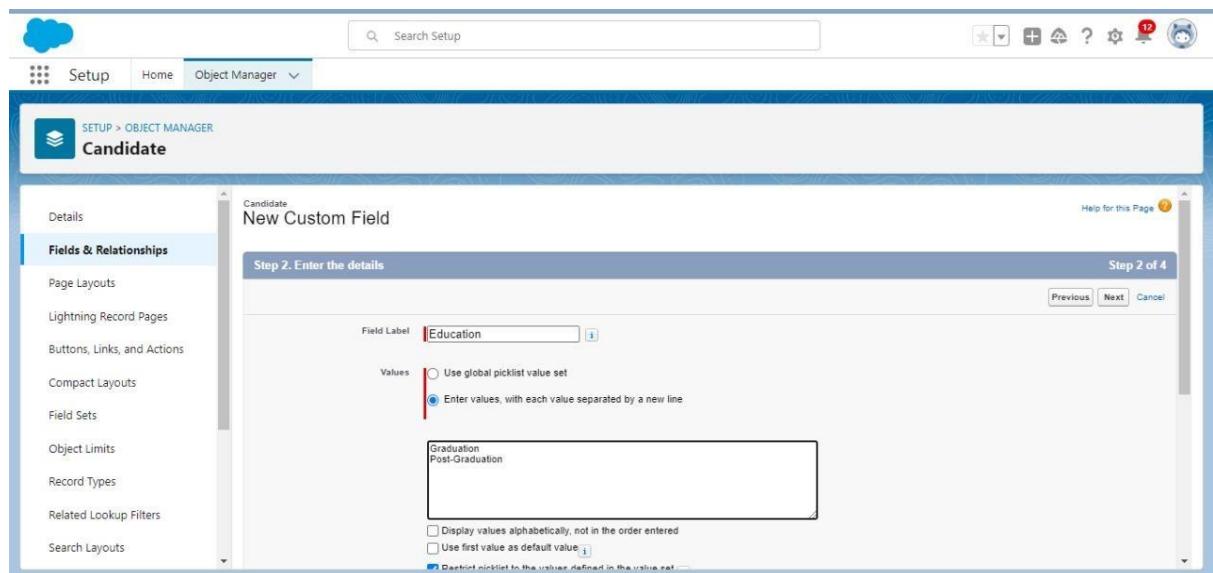
8. Select Picklist as the Data Type and click Next. For Field Label enter Education.

9. Select Enter values, with each value separated by a new line and enter these values: Graduation, Post-Graduation. Click Next, Next, then save and new.

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar includes a cloud icon, 'Search Setup', and various setup tools. The main area shows the 'Candidate' object under 'SETUP > OBJECT MANAGER'. A sidebar on the left lists options like 'Details', 'Fields & Relationships' (which is selected), and 'Page Layouts'. The main content area is titled 'Candidate New Custom Field' and 'Step 2. Enter the details'. It shows the 'Field Label' as 'Education'. Under 'Values', the radio button 'Enter values, with each value separated by a new line' is selected. A text input box contains the values 'Graduation' and 'Post-Graduation', separated by a new line. Below the input box are three checkboxes: 'Display values alphabetically, not in the order entered', 'Use first value as default value', and 'Direct picklist to the values defined in the value set'. The top right corner indicates 'Step 2 of 4' with 'Previous', 'Next', and 'Cancel' buttons.

6) Create Field Dependency (On Candidate Object)

- 1.Create a dependency between these two picklists, so that when a state is selected, only respective Values are available.
- 2.The below steps will assist you in creating Field Dependencies.
- 3.Click on the gear icon and then select Setup.
- 4.Click on the object manager tab just beside the home tab.
- 5.After the above steps, Select Candidate Object
- 6.Now Select Fields and relationships from setup menu of the Candidate object.
- 7.Click Field Dependencies.
- 8.Click New.
- 9.Select State as the Controlling Field and select City as the Dependent Field.
- 10.Click Continue.



- 11.Select the appropriate Value in each column by double-clicking them. For Ex. Rajasthan – Jaipur.

12. Click Include Values. And it is also same for UP, MP& Punjab with its city.
13. Click Preview, then test the dependency by selecting different State and viewing the associate Values available for Particular state.
14. Click Close to close the preview window.
15. Click Save.

7) Create Field Dependency (On Candidate Object)

1. Create a dependency between these two picklists, so that when a state is selected, only respective Values are available.
2. The below steps will assist you in creating Field Dependencies.
3. Click on the gear icon and then select Setup.
4. Click on the object manager tab just beside the home tab.
5. After the above steps, Select Candidate Object
6. Now Select Fields and relationships from setup menu of the Candidate object.
7. Click Field Dependencies.
8. Click New.
8. Select State as the Controlling Field and select City as the Dependent Field.
9. Click Continue.
10. Select the appropriate Value in each column by double-clicking them. For Ex. Rajasthan - Jaipur
11. Click Include Values. And it is also same for UP, MP& Punjab with its city.

Controlling Field State
Dependent Field City

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend: Excluded Value (Grey), Included Value (Yellow)

Showing Columns: 1 - 4 (of 4) < Previous Next > View All Go to				
State:	Rajasthan	UP	MP	Punjab
City:	Jaipur	Jaipur	Jaipur	Jalandhar
	Jalandhar	Jalandhar	Jalandhar	Ludhiana
	Lucknow	Lucknow	Lucknow	Lucknow
	Bhopal	Bhopal	Bhopal	Bhopal

Click button to include or exclude selected values from the dependent picklist:

Showing Columns: 1 - 4 (of 4) < Previous | Next > View All

12. Click Preview, then test the dependency by selecting different State and viewing the associate Values available for Particular state.
13. Click Close to close the preview window.
14. Click Save.

8) Creation Lookup Relationship for The Job Application Objects

Let's create two lookup relationship on job application object First lookup relationship

- 1.From Setup, go to Object Manager
- 2.On the sidebar, click Fields & Relationships.
- 3.Select Lookup relationship & click next
- 4.Choose the related object as Candidate & click next
- 5.Give the field label (Candidate name) & click next, next, next and Save

Second lookup relationship

- 1.From Setup, go to Object Manager
- 2.On the sidebar, click Fields & Relationships.
- 3.Select Lookup relationship & click next
- 4.Choose the related object as Job & click next
- 5.Give the field label (Job Name) & click next, next, next and Save

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate name	Candidate_name_c	Lookup(Candidate)		✓
Created By	CreatedById	Lookup(User)		
Job Application Number	Name	Auto Number		✓
Job Name	Job_Name_c	Lookup(Job)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

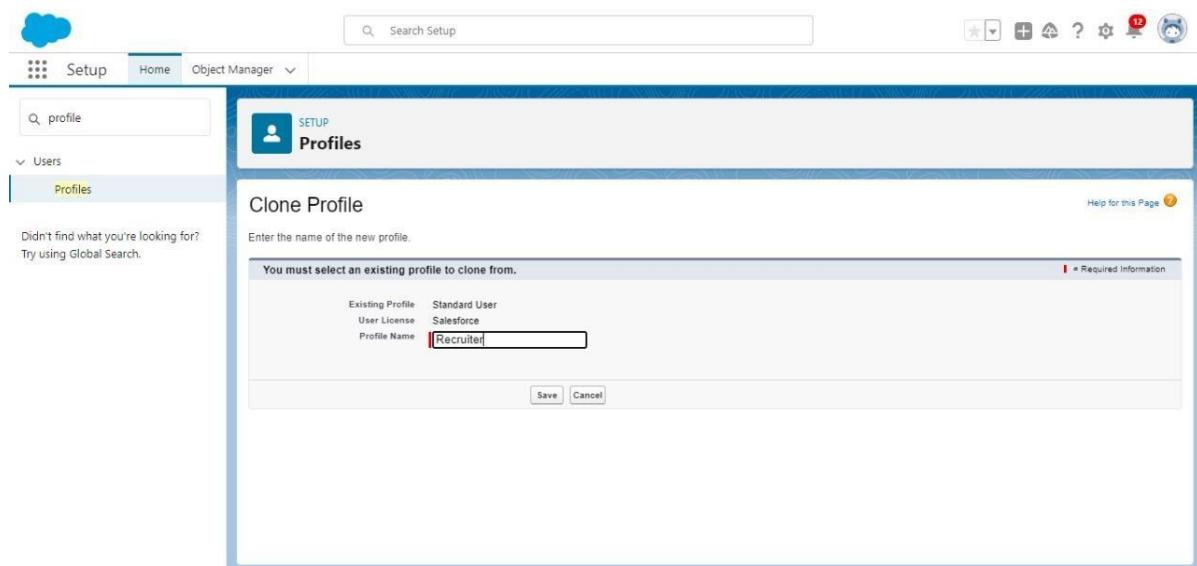
CHAPTER - 7

Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. A profile can be assigned to many users, but user can be assigned single profile at a time.

1) Create A Custom Profile

- 1.From setup, enter profiles in Quick Find box
- 2.Select profiles (Standard user).
- 3.Click clone.
- 4.For Profile, enter Recruiter.
- 5.Click save.

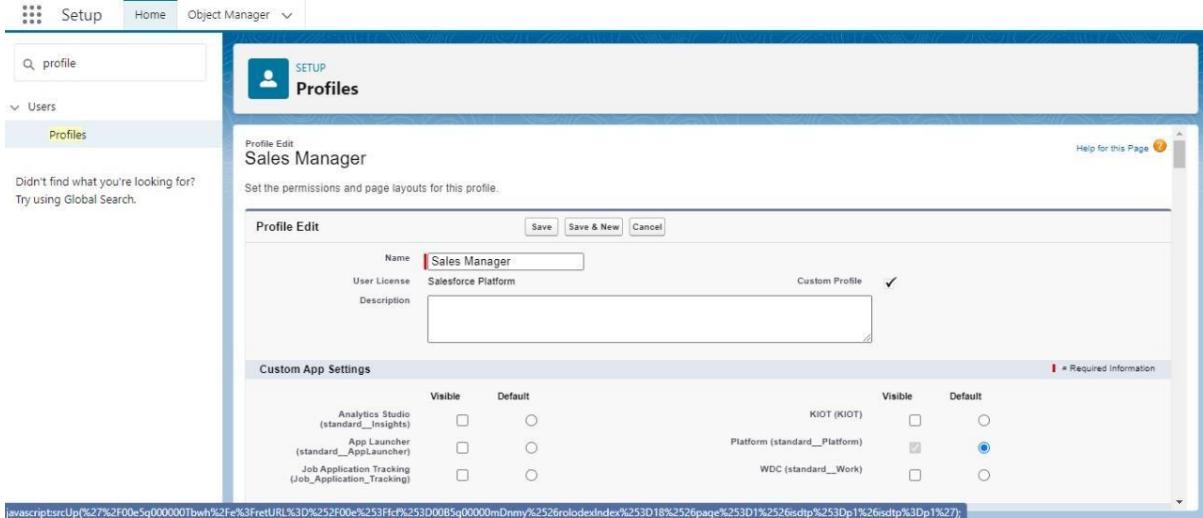


2) Create A Custom Profile-2

- 1.Create a profile with the profile name as “Sales Manager”.
- 2.From setup, enter profiles in Quick Find box

3.Select profiles (Standard user).

4.Click clone.



Role

In Salesforce, roles are used to determine which users have access to certain data and functions within the system. They are also used to define the reporting hierarchy within an organization. Users with higher roles have greater access to data and more control over the system.

1)Creation of Role

- 1.From the Quick find box search for the role and click on the roles option
- 2.select the set-up roles option
- 3.Below the CEO click on add role and enter the label name as a " HR Manager" and role name will be Automatically populated and click on save.

The screenshot shows the Salesforce Setup Roles page. The left sidebar has a search bar and navigation links for Users, Roles (which is selected), Feature Settings, Sales, Service, and Case Teams. The main content area is titled "Creating the Role Hierarchy" and shows "Your Organization's Role Hierarchy". It displays a tree view of roles under "Knowledge Institute Of Technology":

- Knowledge Institute Of Technology
 - CEO
 - CFO
 - COO
 - HR Manager
 - SVP Customer Service & Support
 - SVP Human Resources
 - SVP Sales & Marketing

Each role item has "Edit | Del | Assign" options. There are also "Add Role" buttons next to each main role entry.

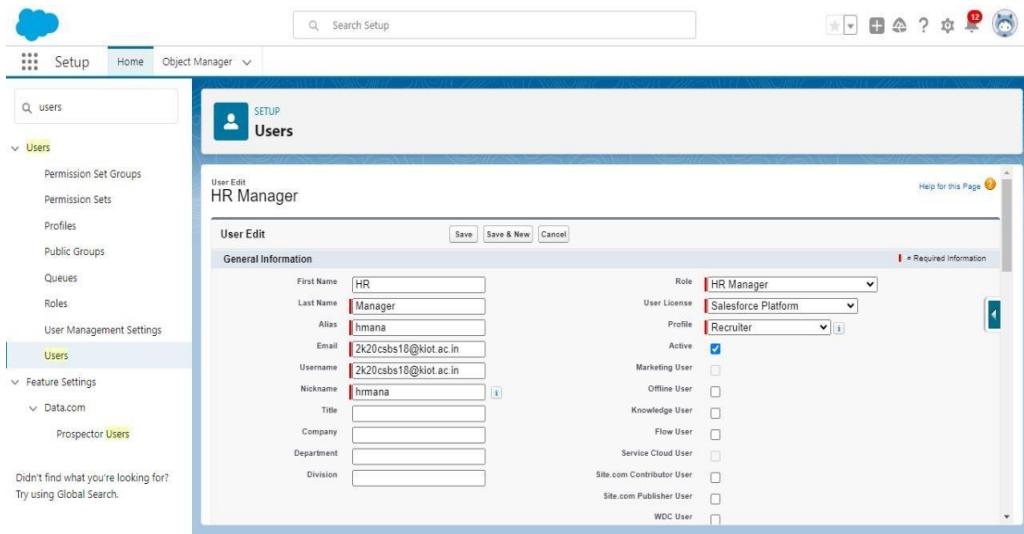
CHAPTER - 8

User:

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

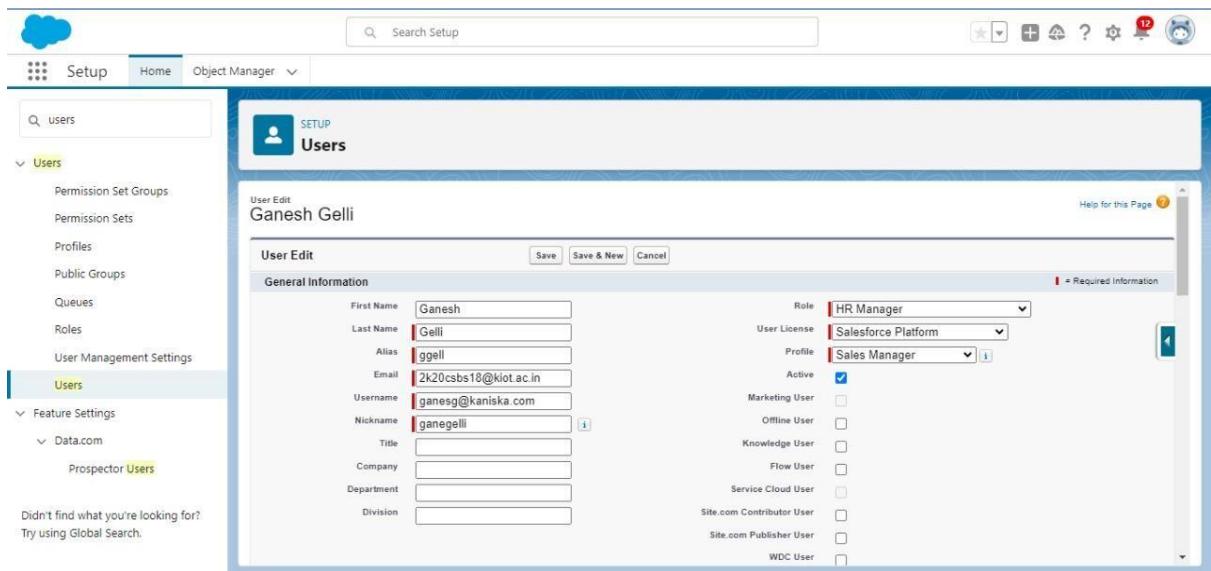
1)To Create A User

- 1.From Setup, enter Users in the Quick Find box, then select Users.
- 2.Click New User.
- 3.Enter First name as HR and last name as Manager.
- 4.Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.
- 5.Then create a new role HR Manager.
- 6.Select user License as Standard Platform User
- 7.Select profile (Recruiter)
- 8.Click save



2) To Create A User

- 1 From Setup, enter Users in the Quick Find box, then select Users.
- 2 Click New User
- 3 Enter First name as Ganesh and last name as Gili.
- 4 Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.
- 5 Then create a new role HR Manager.
- 6 Select user License as Standard Platform User.
- 7 Select profile (Sales Manager).
- 8 Click save



Sharing Rules

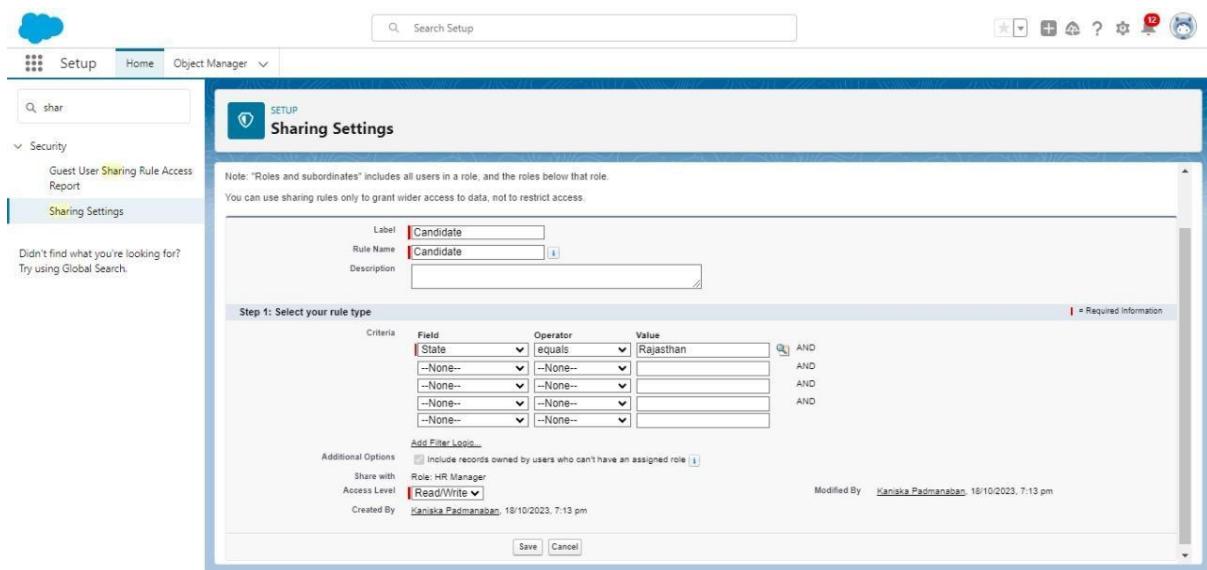
Sharing rules help users to share records based on conditions. It is basically created for objects whose organization-wide defaults (OWD) are set to public read-only or private because sharing rules can only extend the access and not restrict it.

Types of sharing rules,

1. Owner-based Sharing Rules
2. Criteria-based Sharing Rules

1) Create A Sharing Rule

1. Go to Sharing Settings, which can be found under the Quick Find section.
2. Scroll down and find the candidate object where a sharing rule needs to be added, and then click on New to create a new sharing rule.
3. Add the label of the sharing rule you want to make.
4. Select your rule type based on the criteria.
5. Select the field can join immediately check field from the candidate object.
6. Select the State as equal and value is Rajasthan.
7. And in selecting the users to share with the section select roles and in that select Hr Manager.
8. And in the section of select the level of access for the users give the access Read/Write.
9. And save the rule.



2) Activity 2

Create a Sharing Rule to Share the records of Job Application to HrManager with the Access of Read/Write.

Create A Sharing Rule

- 1.Go to Sharing Settings, which can be found under the Quick Find section.
- 2.Scroll down and find the Job Application object where a sharing rule needs to be added, and then click on New to create a new sharingrule.
- 3.Add the label of the sharing rule you want to make.
- 4.Select your rule type based on the criteria.
- 5.Select the field can join immediately check field from the Job Application object.
- 6.Job application number contains some number.
- 7.And in selecting the users to share with the section select roles andin that select Hr Manager.
- 8.And in the section of select the level of access for the users give theaccess Read/Write.
- 9.And save the rule

Setup Home Object Manager

Q, shar

Security

Guest User Sharing Rule Access Report Sharing Settings

Didn't find what you're looking for? Try using Global Search.

SETUP Sharing Settings

Job Application Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Label: Job Application
Rule Name: Job_Application
Description:

Step 1: Select your rule type

Criteria	Field	Operator	Value	AND
	Job Application Number	contains	Some number	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		

Add Filter Logic...
Additional Options: Include records owned by users who can't have an assigned role
Share with: Role: HR Manager
Access Level: Read/Write
Created By: Kanika Padmanabhan, 18/10/2023, 7:30 pm
Modified By: Kanika Padmanabhan, 18/10/2023, 7:30 pm

CHAPTER - 10

FLOWs:

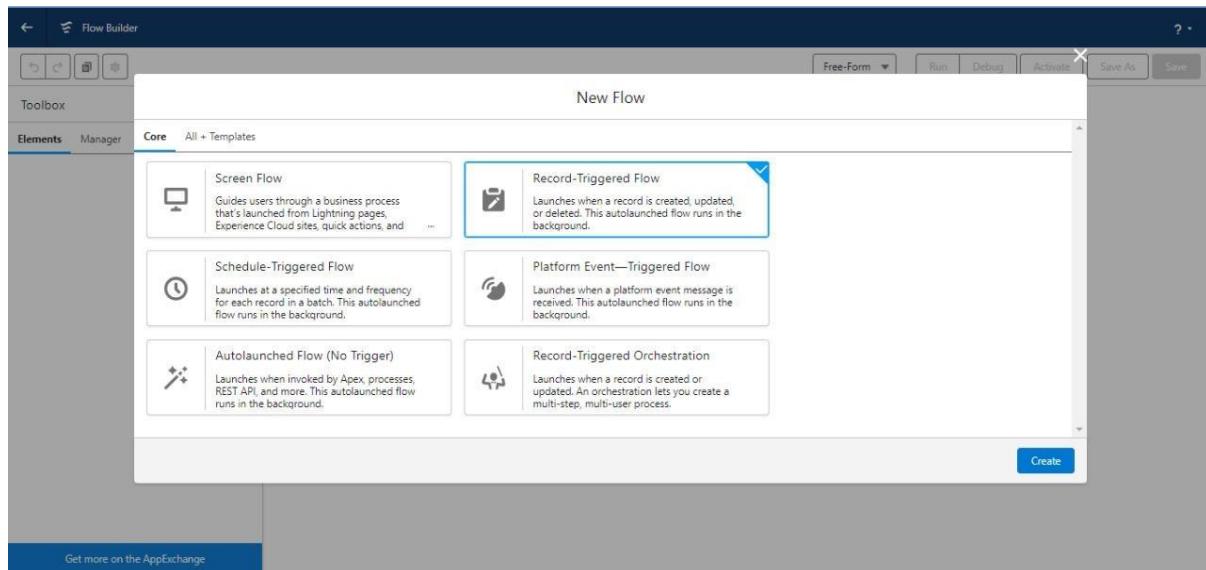
Flows in Salesforce, a flow is a tool that automates complex business processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows. Flow Builder can be used to build code-like logic without using a programming language. Flows fall into five categories:

- 1.Screen Flows
- 2.Schedule-Triggered Flows
- 3.Autolaunched Flows
- 4.Record-Triggered Flows
- 5.Platform Event-Triggered Flows

1)Create A Record Trigger Flow on Job Object

- 1.Click on Gear icon and select setup
- 2.In Quick find Box enter flow and select the flows
- 3.Click on New flow and Select Record triggered Flows.

4. In the search bar type job and click done.



5. Add an element called Get record.

6. Label name as Recruiter Records.

7. Select the object as Recruiter.

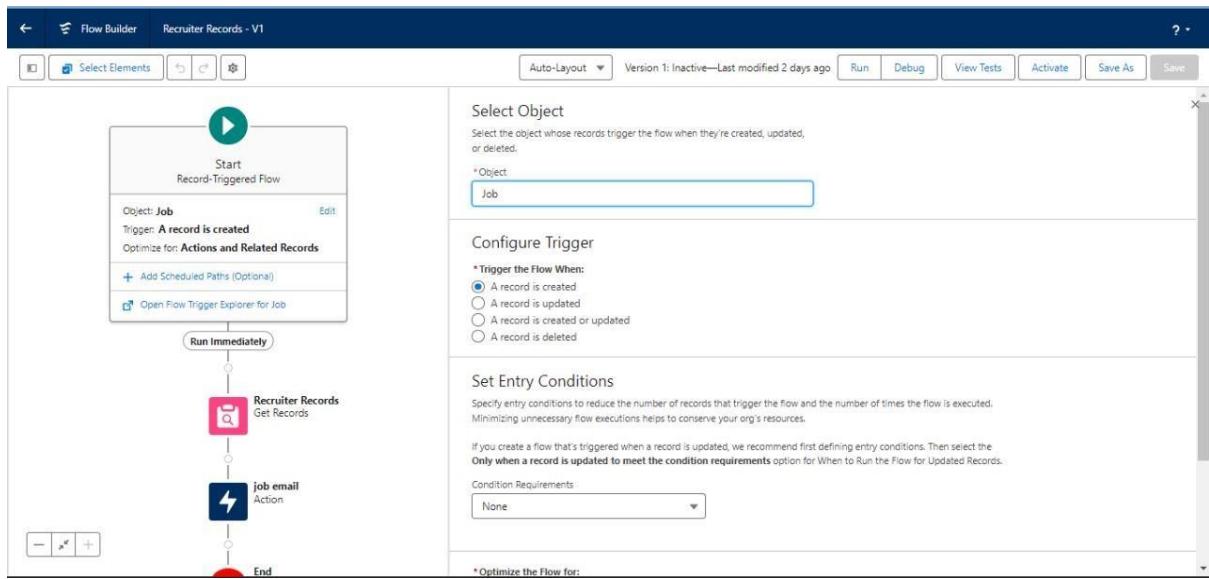
8. After entering the object follow the steps.

10. Conditional requirements should be all conditions are met (AND).

11. Select the field as Recruiter_Email__c.

12. Operation should be Is Null.

13. Value should be False. And click done.



14. Add another element called Action.

15. Click on the Action and start creating new action

16. Select the action as Send Email.

17. Enter the label name job email, API name is auto populated.

18. Set input values as

a. Body: { !\$Record.Name } with

{ !\$Record.Job_Application_Id___c } is available. Please find the suitable candidates for the position.

b. Subject: { !\$Record.Name }

19. Recipient Email Addresses (comma-separated) should be included for that turn it on.

20. Recipient Email Addresses:

{ !\$Record.Recruiter_Name__r.Recruiter_Email___c }

21. Click on done.

22. After the completion of flow, check whether the flow is running and click save.

23. And Activate the flow.

Edit Get Records
Recruiter Records (Recruiter_Records)

Get Records of This Object

* Object
Recruiter

Filter Recruiter Records

Condition Requirements
All Conditions Are Met (AND)

Field	Operator	Value
Email__c	Is Null	False

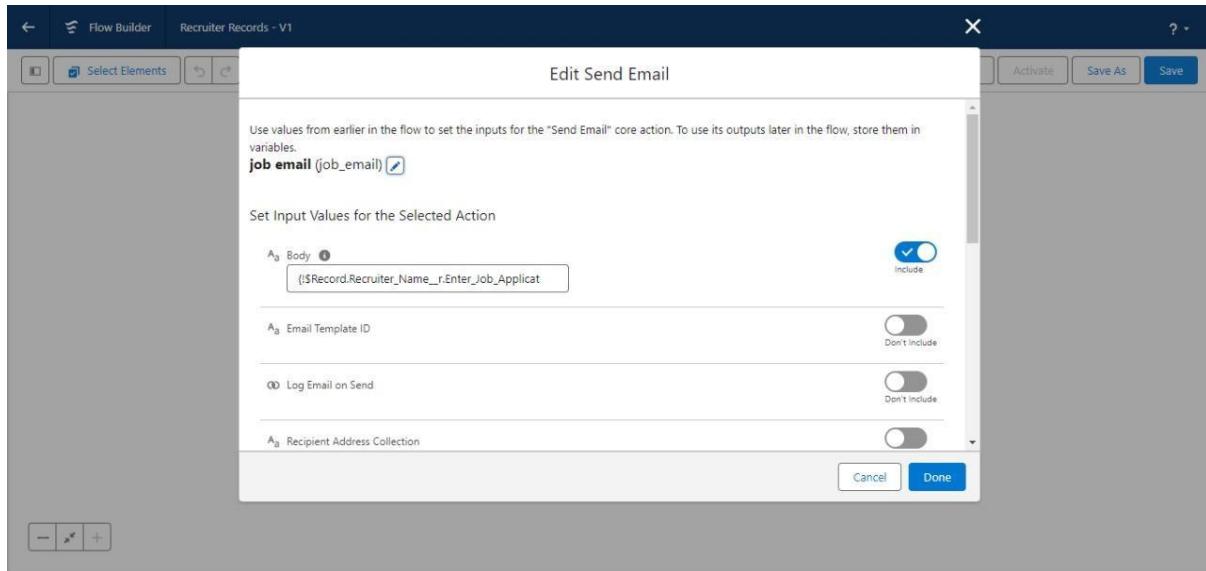
+ Add Condition

Sort Recruiter Records

Sort Order
Not Sorted If you store only the first record, filter by a unique field, such as ID.

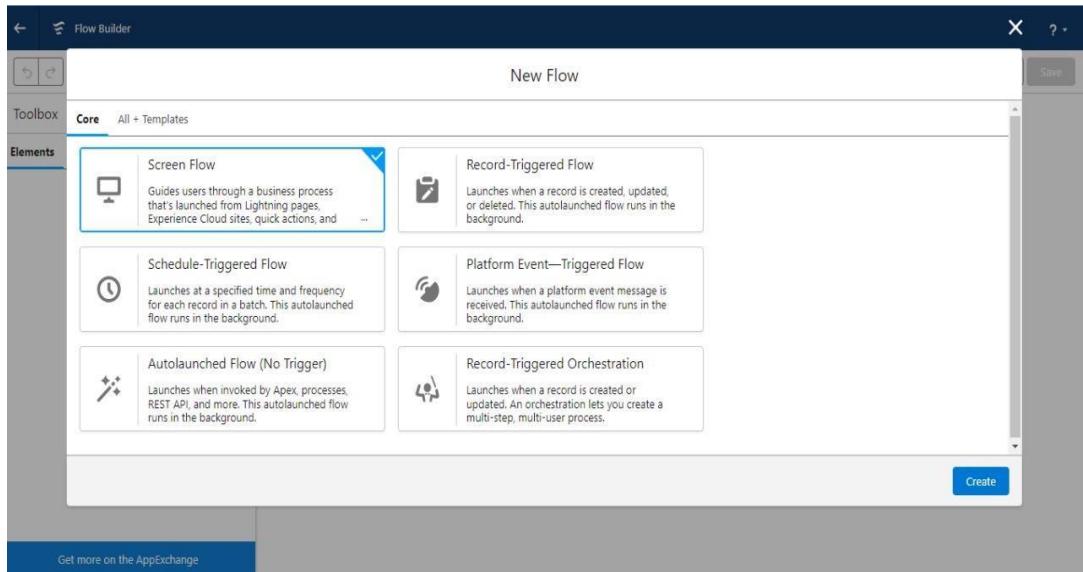
How Many Records to Store
 Only the first record
 All records

How to Store Record Data
 Automatically store all fields
 Choose fields and let Salesforce do the rest
 Choose fields and assign variables (advanced)

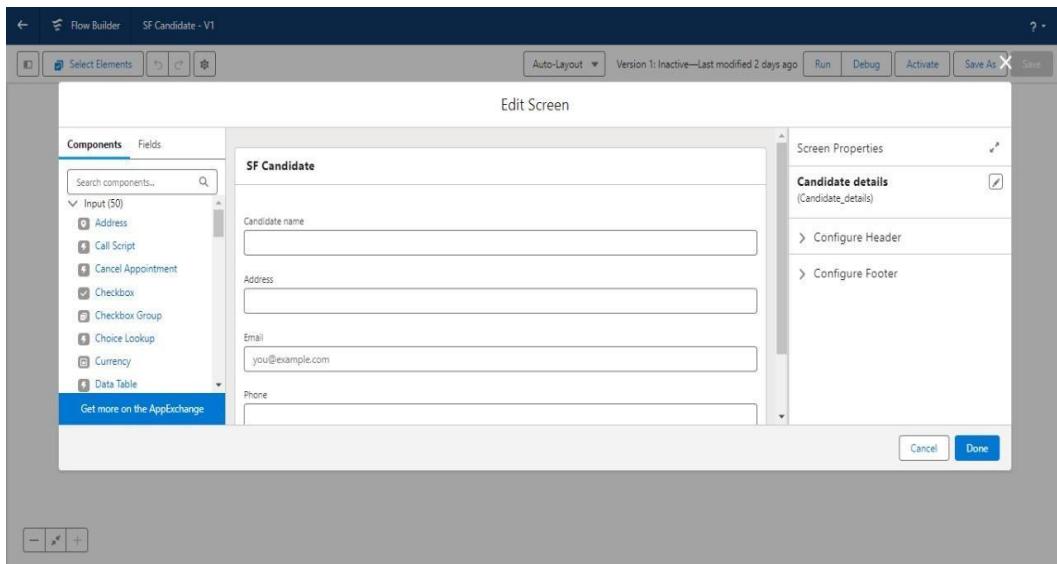


2)Create Another Flow

- 1.Click on Gear icon and select setup
- 2.In Quick find Box enter flow and select the flows
- 3.Click on New flow and Select Screen Flows.
- 4.Add an element called screen.
- 5.Screen label should be Candidate details.
- 6.API name is auto populated.
- 7.Add the components in canvas
- 8.Select the text from the components.
- 9.Label name as Candidate name.

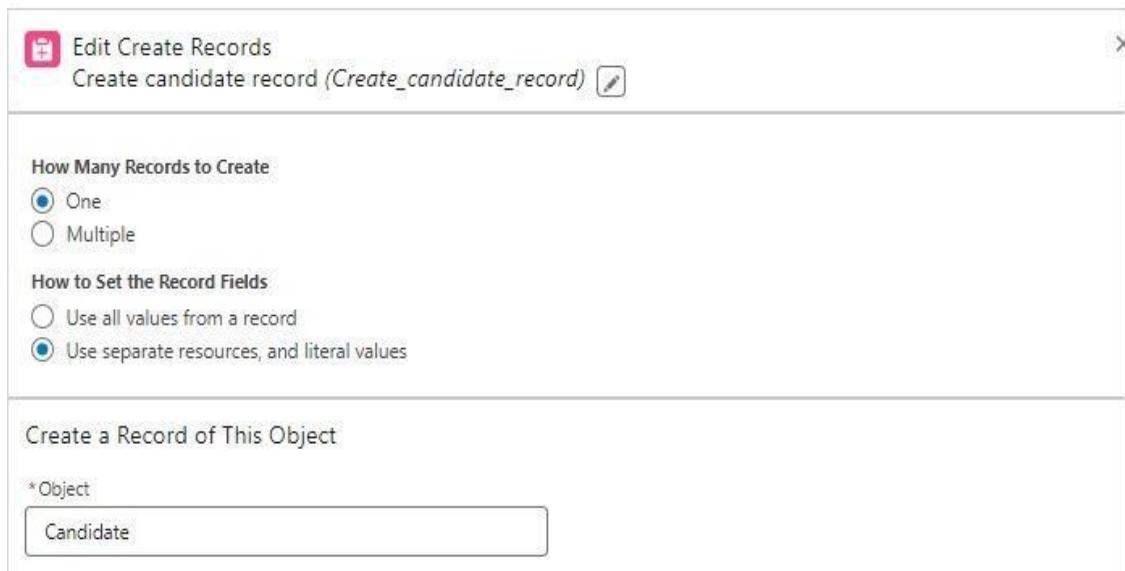


10. API name is auto populated.
11. Select the text area from the components.
12. Label name as Address.
13. API name is auto populated.
14. Select the email from the components.
15. Label name as Email.
16. API name is auto populated.
17. Select the Phone from the components.
18. Label name as Phone.
19. API name is auto populated.
20. Select the picklist from the components.



- 21.Label name as Education.
- 22.API name is auto populated.
- 23.And select the choice as {!pick}.
- 24.Add a header to the canvas candidate flow for job application.
- 25.Click on save.

- 26.Next, add another element called create record.
- 27.Label name should be Create candidate record.
- 28.API is auto populated. and change the How to Set the Record Fields to Use separate resources, and literal values.
- 29.Select the object Candidate1.



30. Set the values for the candidate1 as
31. Field is Address_c and value should be {!Address}.
32. Field is Education_c and value should be {!Education}.
33. Field is Email_c and value should be {!Email.value}.
34. Field is Name and value should be {!Candidate_name}.
35. After that click on done.
36. Run the flow and check whether the flow is working and click on save.
37. And activate the flow.

Create a Record of This Object

* Object

Candidate

Set Field Values for the Candidate

Field	Value	Remove
Address_c	Aa Address X	X
Education_c	Graduation	X
Email_c	{!Email}	X
Name	Aa Candidate_name X	X

[+ Add Field](#)

Manually assign variables

CHAPTER – 11

REPORTS & DASHBOARD

Reports:

A report is a list of records that meet the criteria you define. It's displayed in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

1)Create A Report

- 1.Create a report that displays rating of the account and which has type and account name.
- 2.Click on app launcher search for reports.
- 3.Click on the new report and select the category has job application with candidate name.
- 4.In the details section select the option start report.
- 5.show me my job application and job application created date (All time)
- 6.In the outline pane, group rows select job application created date.
- 7.Save the report by giving label name (Job application wtih candidate name) and save the folder as a public folder and save the report.

The screenshot shows the Salesforce Report Builder interface. At the top, there are four tabs: Home | Salesforce, Candidate | Salesforce, Job Application | Salesforce, and Report Builder | Salesforce. The current tab is Report Builder | Salesforce. Below the tabs is a header with a cloud icon, a search bar, and several icons for navigation and settings.

The main area is titled "REPORT" and shows a report titled "Candidate and Job Application". The report has a single section labeled "Candidates".

On the left, there's a sidebar titled "Fields" with sections for "Outline" (selected), "Filters" (with a count of 1), "Groups", and "Columns". The "Filters" section shows a single filter: "Candidate: Candidate Name". A message indicates "No records returned. Try editing report filters:" followed by two bullet points: "Show All candidates." and "Edit other filters in the filter panel."

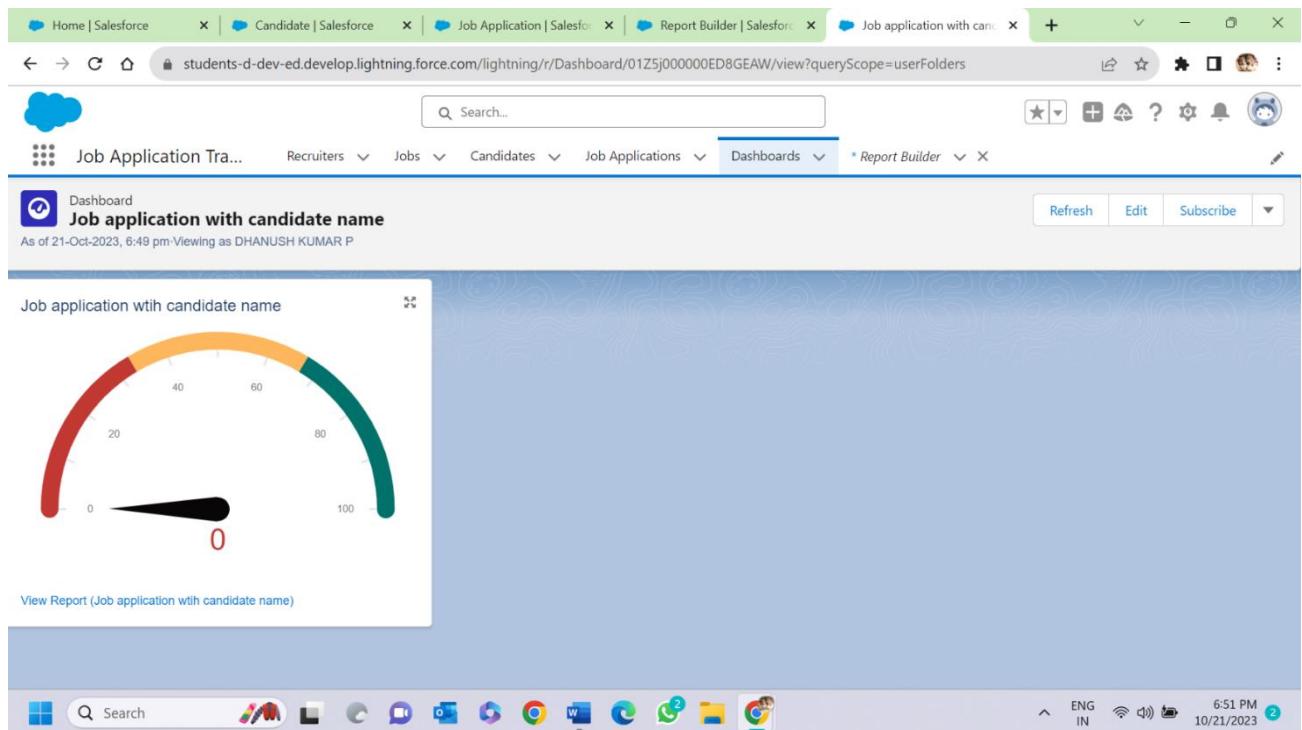
At the bottom, there's a taskbar with various application icons and system status indicators like battery level, signal strength, and the date/time (6:46 PM, 10/21/2023).

Dashboard

Dashboards provide more insights than reports as they combine the data from many reports and show a summarized result. Looking at many reports at a time gives the flexibility of combining the results from them quickly. Also, summaries in dashboards help us decide on action plans quicker. The dashboards can contain charts, graphs and Tabular data.

1)Create A Dashboard

- 1.Click the Dashboards tab.
- 2.Click New Dashboard.
- 3.Name the dashboard Job application with candidate name and click Create.
- 4.Click +Component.
- 5.Select the Job application with candidate name and click Select.
- 6.Select the Gauge chart and click Add.
- 7.Click Save and then Done.



CHAPTER – 12

GITHUB & PROJECT VIDEO DEMO LINK

GitHub: <https://github.com/Dhanush-7-7/naanmuthalvan-Salesforce-NM2023TMID02244-KIOT>

Video Demo Link:

[https://drive.google.com/file/d/1SNtqe4eCiEFm54tl0oyFSCBN2L3utiCs/
view?usp=drive_link](https://drive.google.com/file/d/1SNtqe4eCiEFm54tl0oyFSCBN2L3utiCs/view?usp=drive_link)