# DONE

Objects to create

Job Opening

|  |  |  |
| --- | --- | --- |
| Title | Text | X |
| Company | Master detail | X |
| Description | Text Rich | X |
| Experience (years) | Text | X |
| Skills required | Multi-picklist | X |
| Salary | Number | X |
| Start date | Date | X |
| End Date | Date | X |
| Active | Checkbox | X |
| Status | New/In Process/Offer Sent/Canceled | X |

Applications

|  |  |  |
| --- | --- | --- |
| Date | Date | X |
| Applicant | Lookup Contact Candidate | X |
| Job opening | Lookup | X |
| Company | Job opening-> company | X |
| Status | Picklist (New/Interview/Candidate Approved/Candidate rejected | X |
| Interviewer | Lookup Contact Interviewer | X |
| Offers | Related List | X |
| Interviews | Related list | X |
| Interview | Lookup | X |

Job Offer

|  |  |  |
| --- | --- | --- |
| Application | Lookup | X |
| Applicant | Application->Candidate | X |
| Job Opening | Application 🡪Job opening | x |
| Status | Picklist (New/Sent/Accepted/Rejected) | X |

Interview

|  |  |  |
| --- | --- | --- |
| Date | Date | x |
| Application | Lookup | X |
| Interviewer | Application -> Interviewer | X |
| Candidate | Application -> Applicant | X |
| Feedback | Text Long | X |
| Stage | Picklist (New/Cancelled/Conducted) | X |
| Candidate Approved/Rejected | Checkbox | x |

Objects to modify and use

Account 🡪 for Companies

* Add Contact HR person (Lookup Contact field), Job openings (related list)
* Add action to create a job opening

Contact 🡪 for Candidates/Interviewers

* Record types
* Add Experience level(Candidate), Skills – multi picklist(Candidate), Qualifications Text rich (Candidate), Applications (Related list), Offers (Candidate) (Related list)
* Add list views for Record Types

Roles /Profiles

* Manager 🡪 Recruiter
* Recruiter - can view and edit their own vacancies, Managers - can only see  
  their own vacancies and their recruiter subordinates.

Process (high-level overview)

1. Company creates a job opening
2. Recruiter checks the details and sets it in progress and active when ready
3. Candidates see in progress job openings and apply for them
4. HR fills out an interviewer field and new interview record is created
5. When interview is done, candidate is either approved or not (checkbox)
6. If approved, a job offer can be created from the related application record
7. If Job offer is accepted, job opening is successfully closed, if not – job opening is in process again.

Process details

When Job opening status is changed to in process, set Active True (flow)

When Application is created, recruiters get the email alert (flow)

When Applying for the job (creating an application record using an action button from a Candidate’s record type page layout), check if vacancy is “in process” – (new means HR is checking it) [Done by allowing to apply for only active job openings]

Automatically create an interview record when an interviewer is assigned on the page of an Application record. Conditions: date and Interviewer were changed. Check if an interviewer has less than 3 interviews that week and fill out Application, applicant, and job opening fields in that new interview record (trigger before update)

Send an email to the interviewer when a new interview record is created (flow)

When interview stage is set to “Conducted”, Candidate is approved (checkbox) -> change a related application record status field to Candidate approved (trigger)

When interview stage is set to “Conducted”, Candidate is not approved (checkbox) -> change a related application record status field to Candidate rejected (trigger)

Create a job offer through a button on an application record page if

* it is not already created,
* job opening is active,
* Application status is “candidate approved”,
* Applicant and Job opening should be filled out automatically (flow) (Flow in a debug mode works as expected and creates a job offer, but running a flow by clicking a button on an application page doesn’t work. Theory – it doesn’t get the current record Id. Why?)

When a Job offer status is changed to sent – check if job opening is neither “cancelled” nor “closed” nor “offer sent”, then send an email to the applicant (flow)

When offer is accepted – change the status of the job opening to “position closed” + “active = false”, Application status to “Offer accepted”. (flow)

When offer is declined – change status of the job opening to “in process”, Application status to “offer declined” (flow)

TO DO

* Questions about:
  + 1. recordId in flow (in red ink above)
    2. UI-related question – where should I show LWC? Contact record page -> Candidate Record Type?
* Creating UI for better user experience: Create an LWC component to display a  
  table with interviews for a week. Add a summary LWC component for a candidate to  
  show how many interviews he attended and his offer/reject rate
* **Reporting**
* **Tests for Triggers**