Job Application Tracking System

[Create a CRM Application which helps the applicant to track the No. of jobs he applied and helps him to find the job posted by the various recruiters, find the best attributes to be involved to run the process in a smooth way and easily to track.]

Team ID:

NM2023TMID16394

Team Members:

Gokul .S
Nethajisankar .S
Sanjay .A
Jothibalaji .V

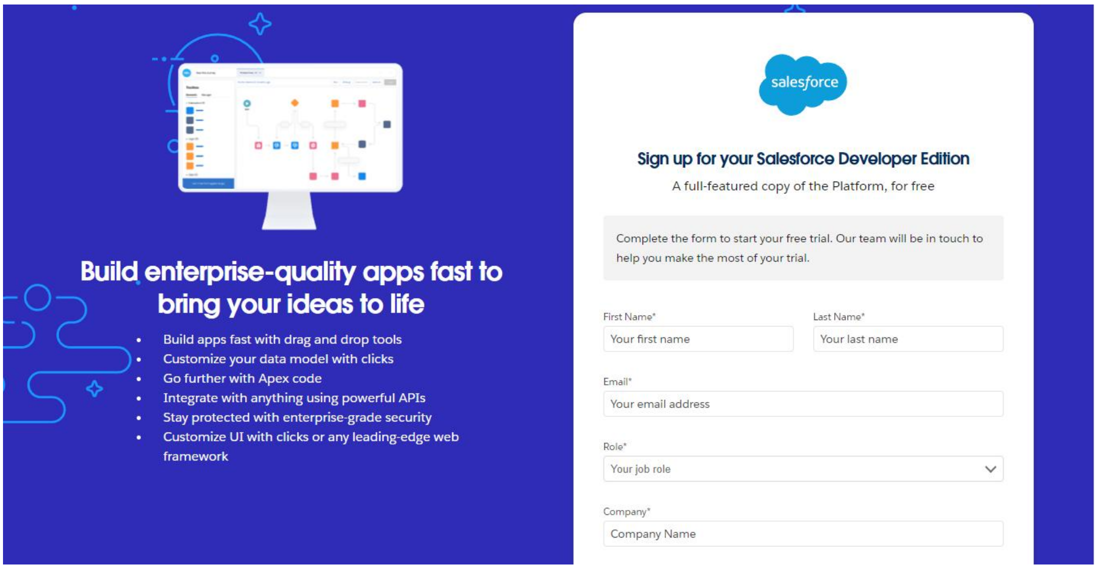
Milestone 1- Salesforce:

Activity 1:

Creating a Salesforce Developer Org:

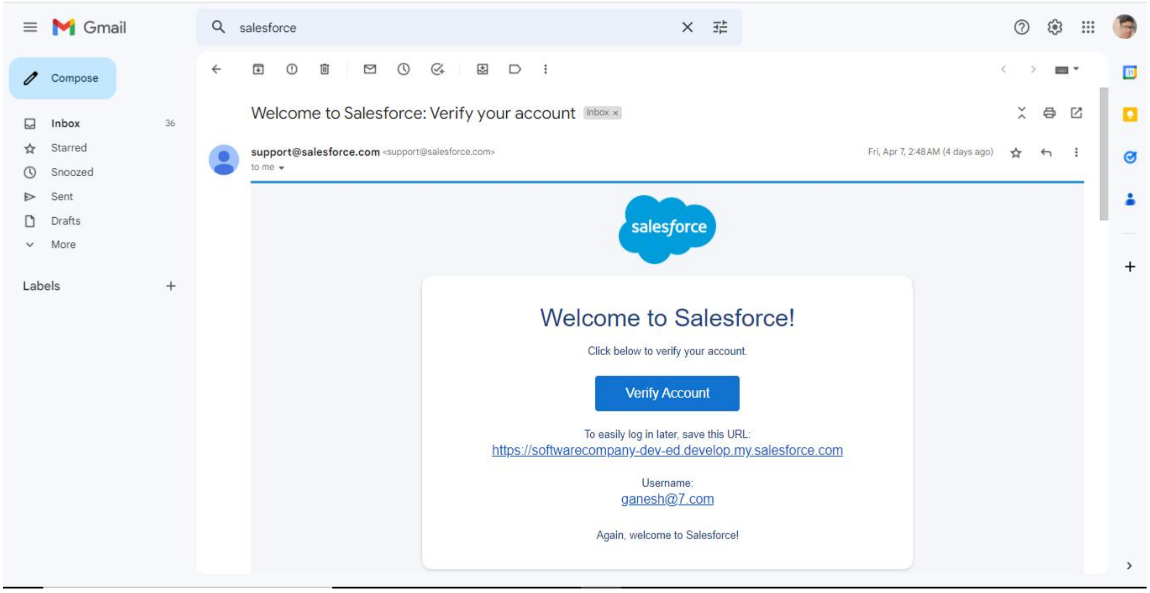
A Developer org has all the features and licenses you need to get started with Salesforce.

- Search developer.salesforce.com

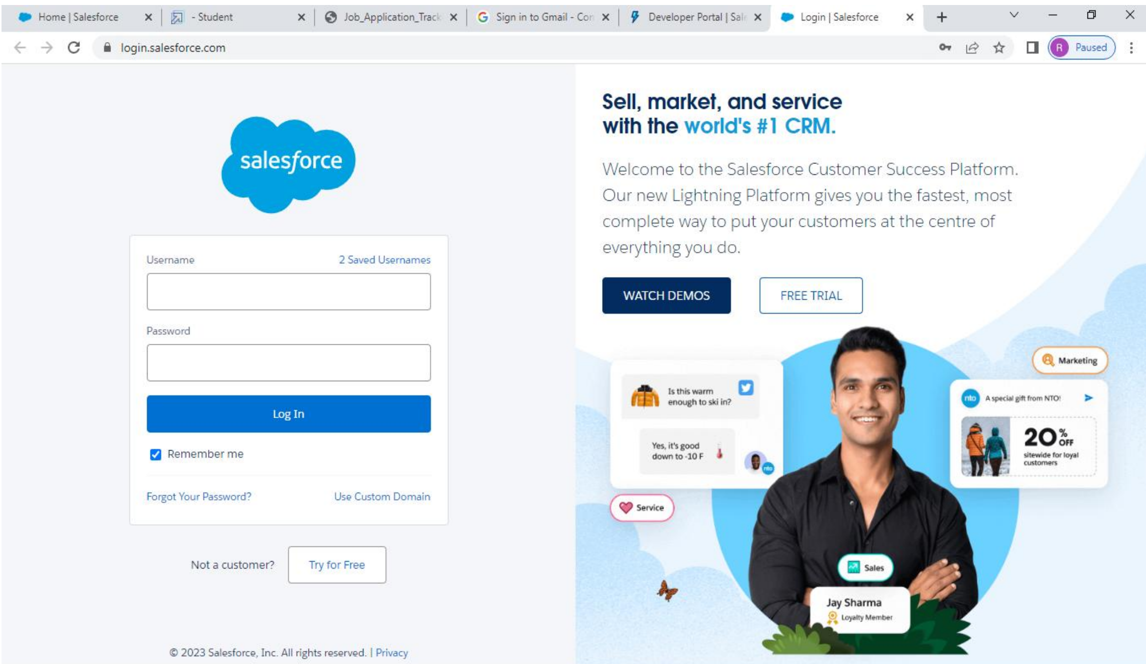


- Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.

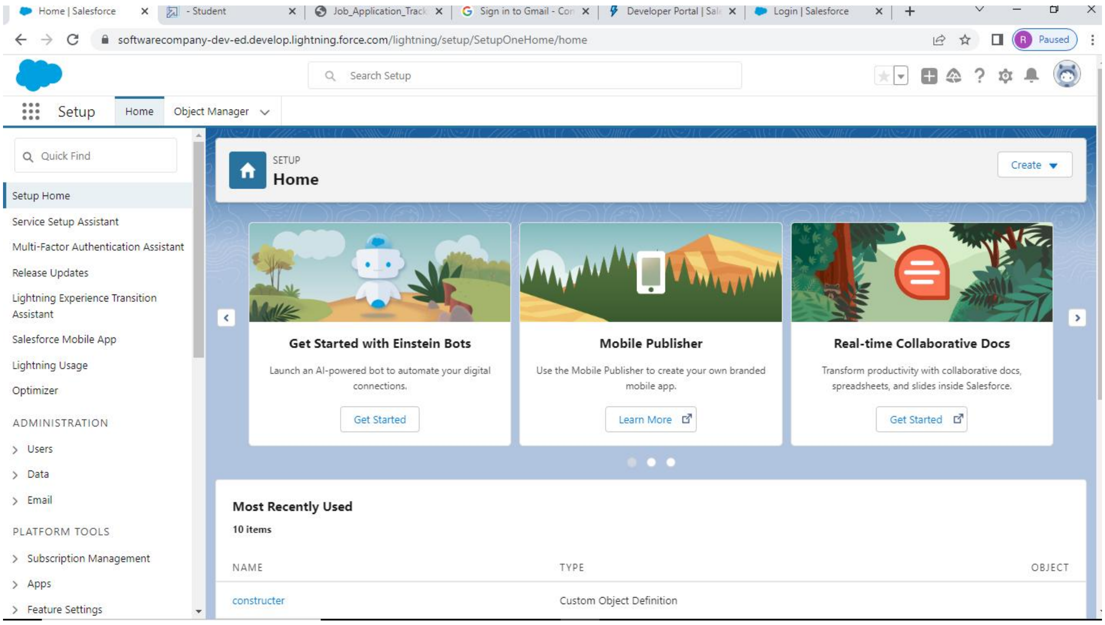
- Click sign me up, after a few min you will reserve a mail salesforce org and by using the verify account link you can create your new password



- Click save.
- Search login.salesforce.com
- By using username and password you can into the salesforce org.



The setup page will appear as below.



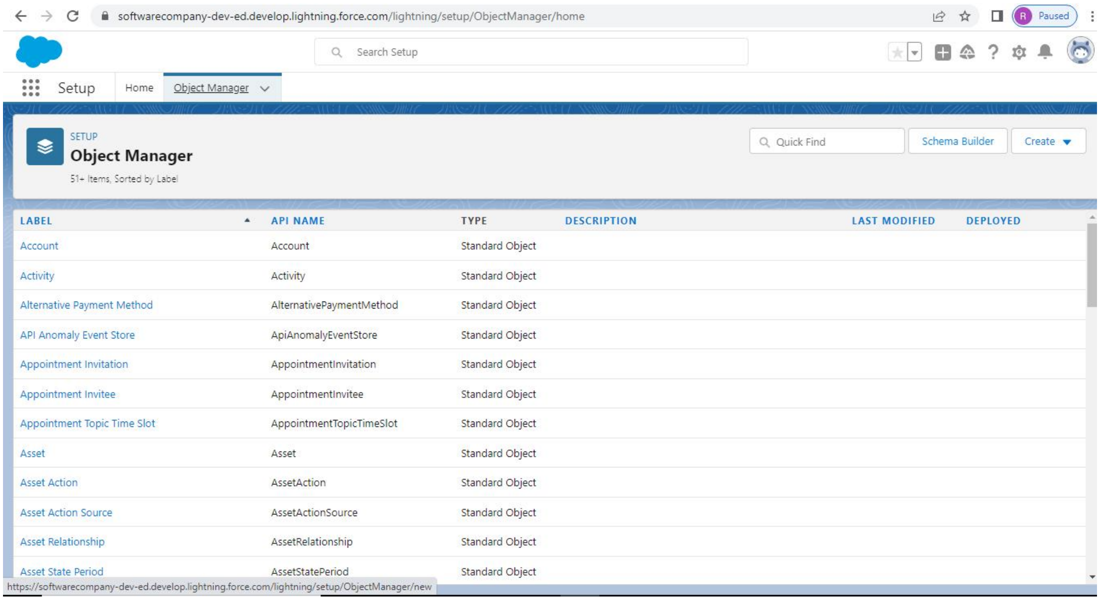
Milestone 2-Object:

Activity 1:

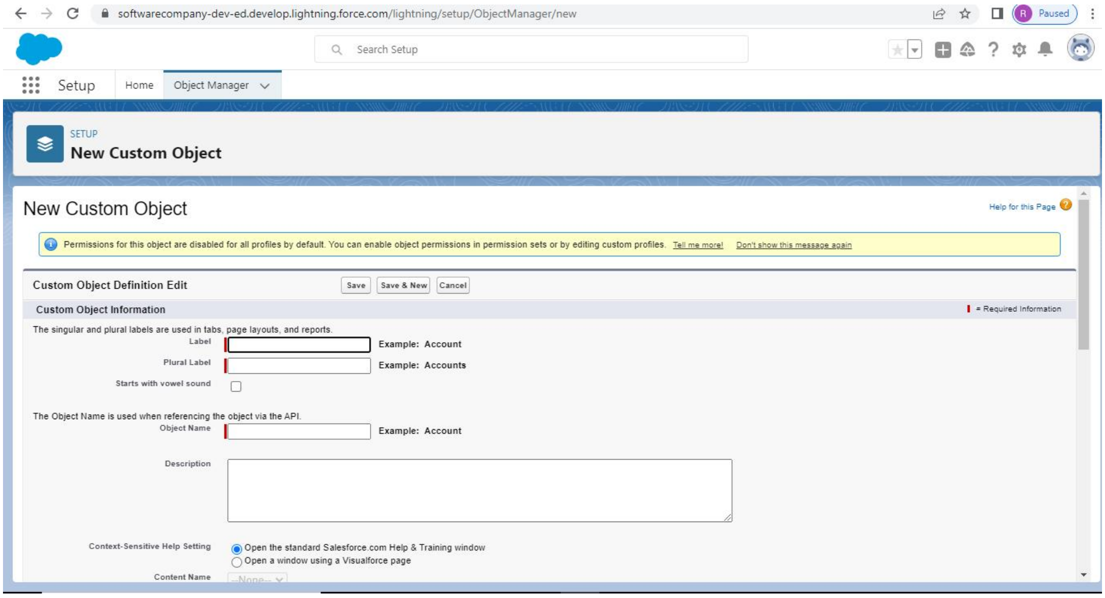
Create a custom object for Recruiter:

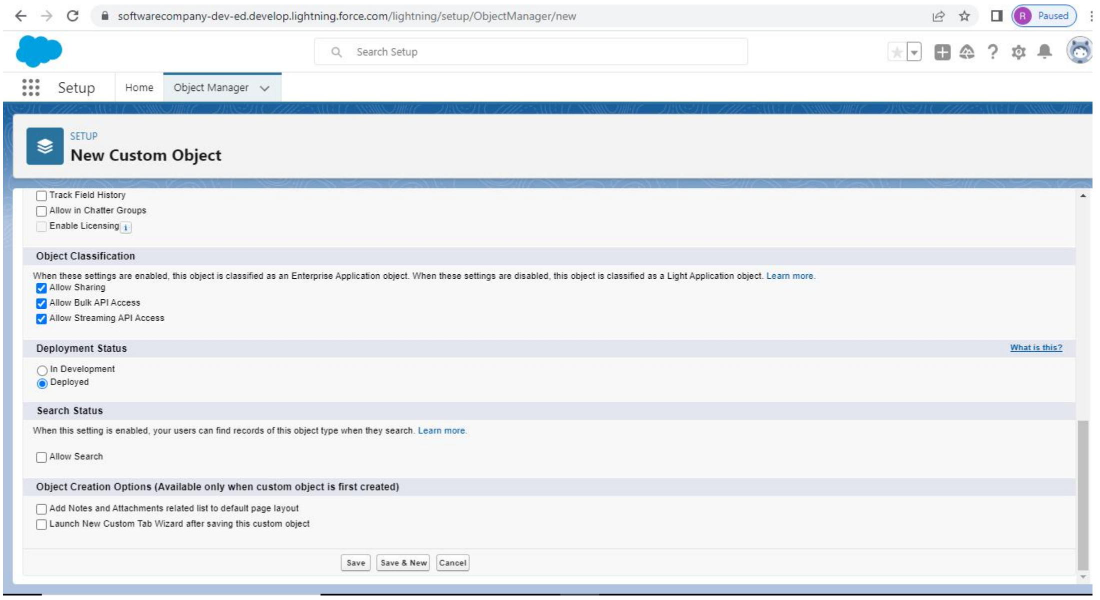
To create a custom object, follow these steps:

- **From setup click on object manager.**
- **Click create, select custom object.**



- Fill in the label as " Recruiter ".
- Fill in the plural label as " Recruiters".
- Record name: " Recruiter Number"
- Select the data type as "Auto Number".
- Under display format enter "REC-{0000}".
- Enter starting number as 1.
- In the Optional Features section, select Allow Reports and Track Field History.
- In the Deployment Status section, ensure Deployed is selected.
- In the Search Status section, select Allow Search.
- In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

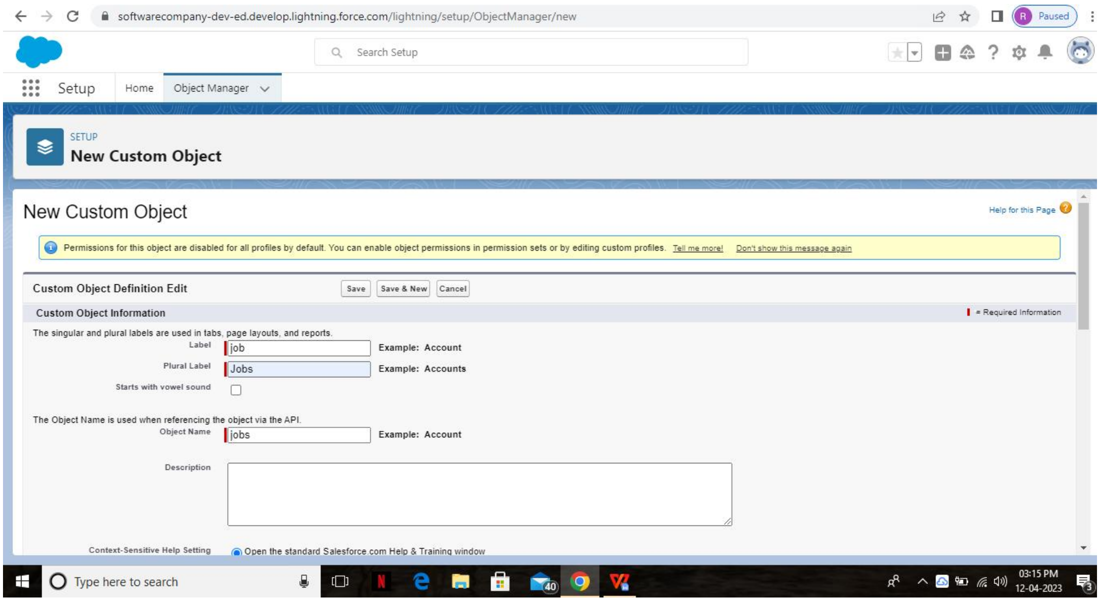


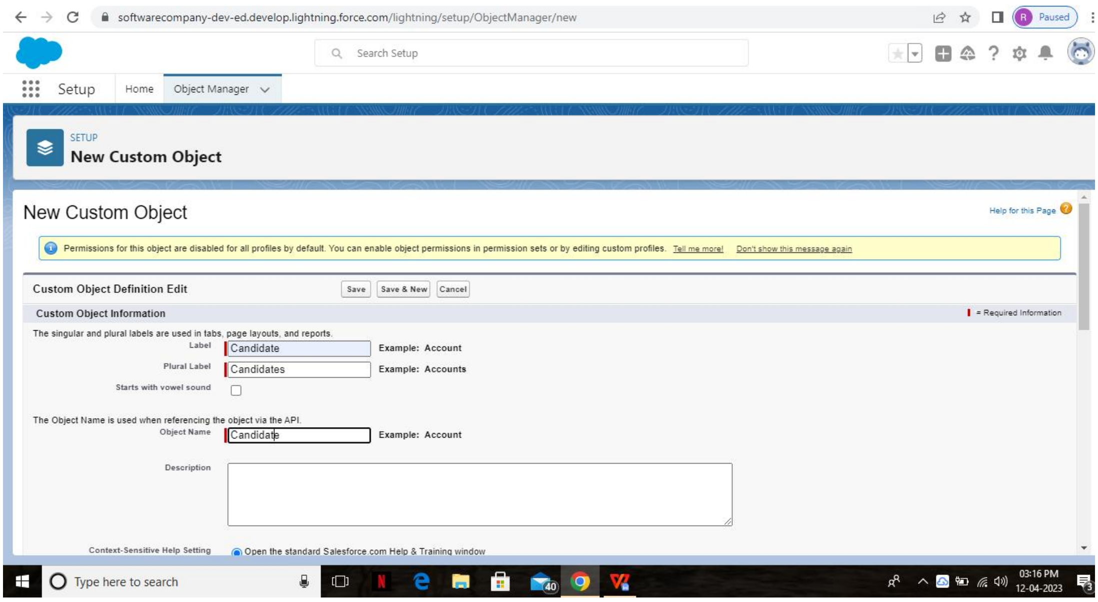


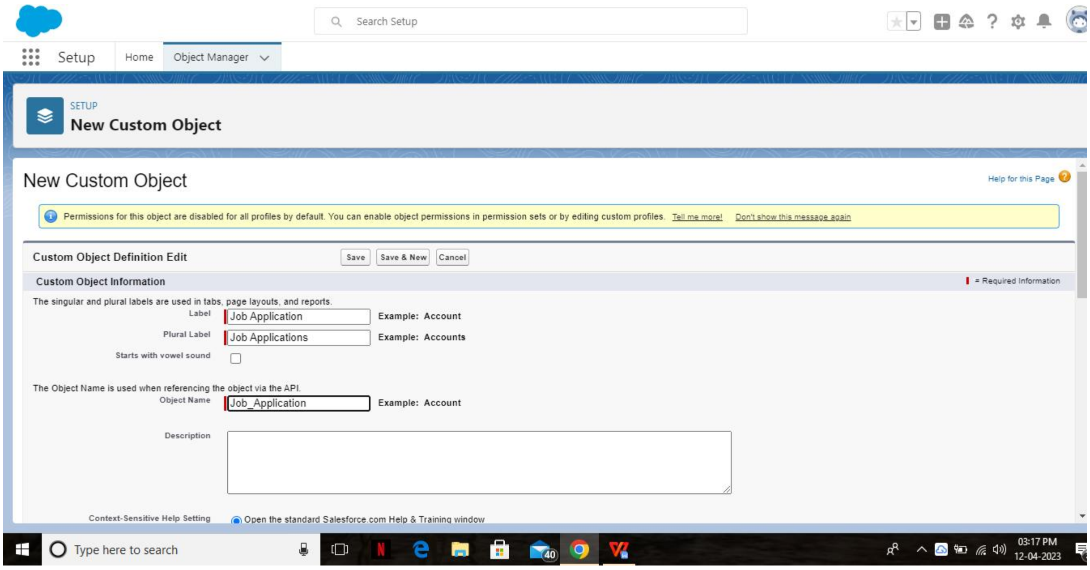
- Leave everything else as is, and click Save

Activity 2:

- Creating a Jobs, Candidate, Job Application Object and Tab.


softwarecompany-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new
Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
job
Example: Account
Plural Label
Jobs
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
jobs
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Type here to search
03:15 PM
12-04-2023


softwarecompany-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new
Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Candidate
Example: Account
Plural Label
Candidates
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Candidate
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Type here to search
03:16 PM
12-04-2023

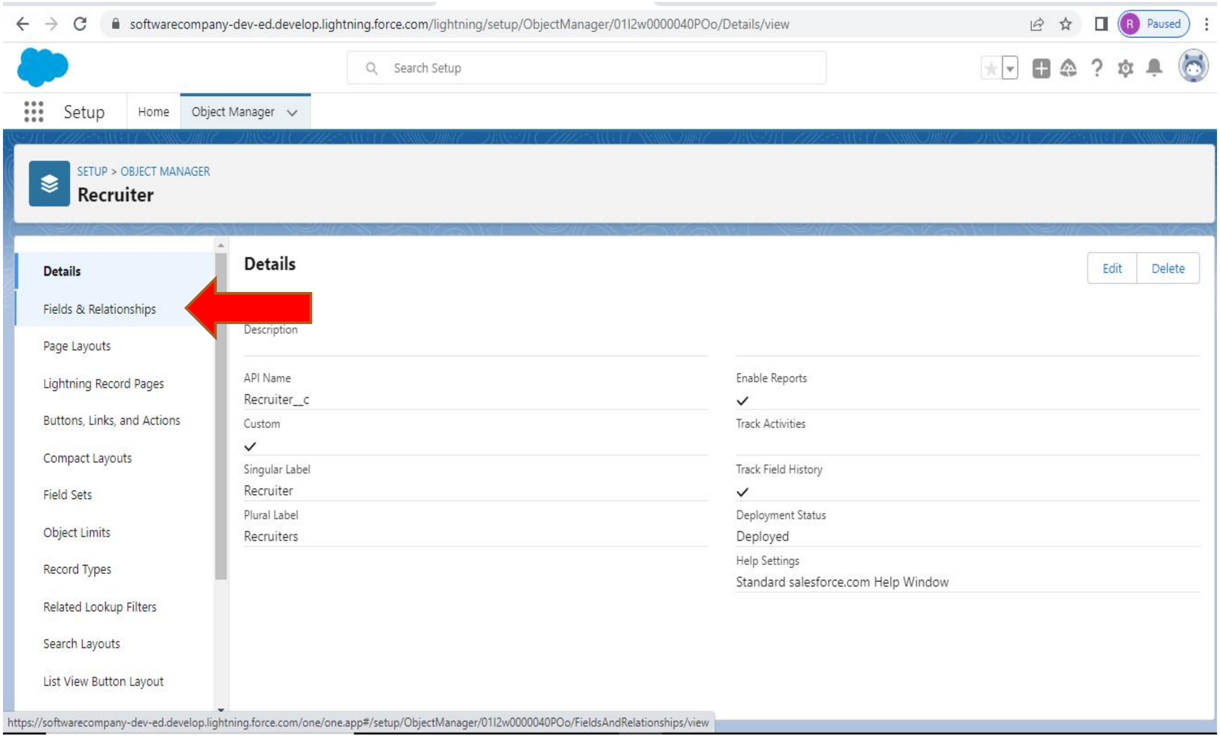


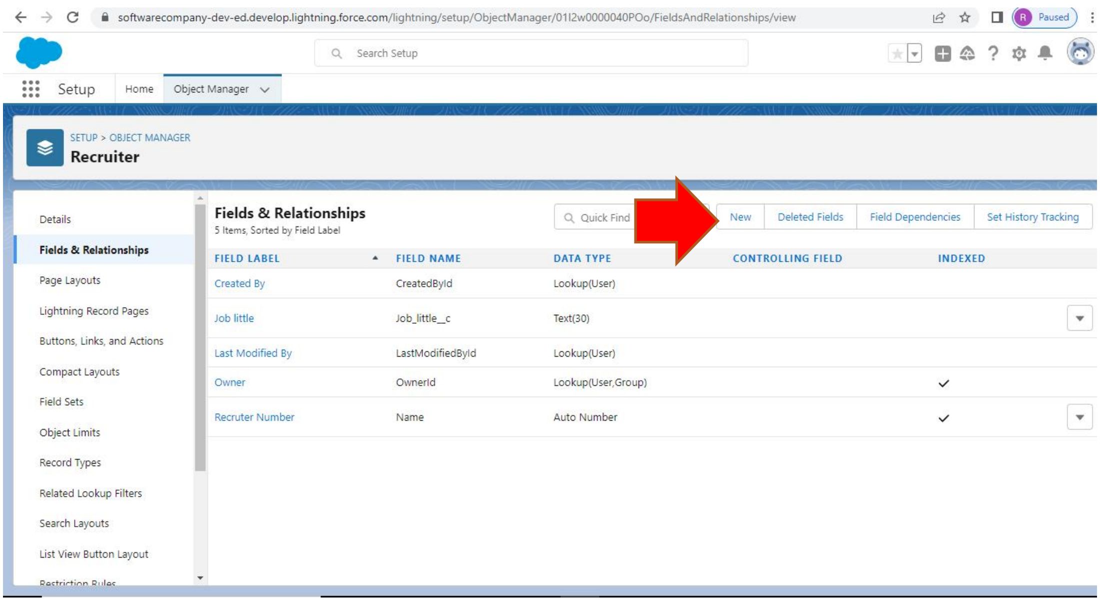
Milestone 3- Fields:

<u>Activity 1:</u>

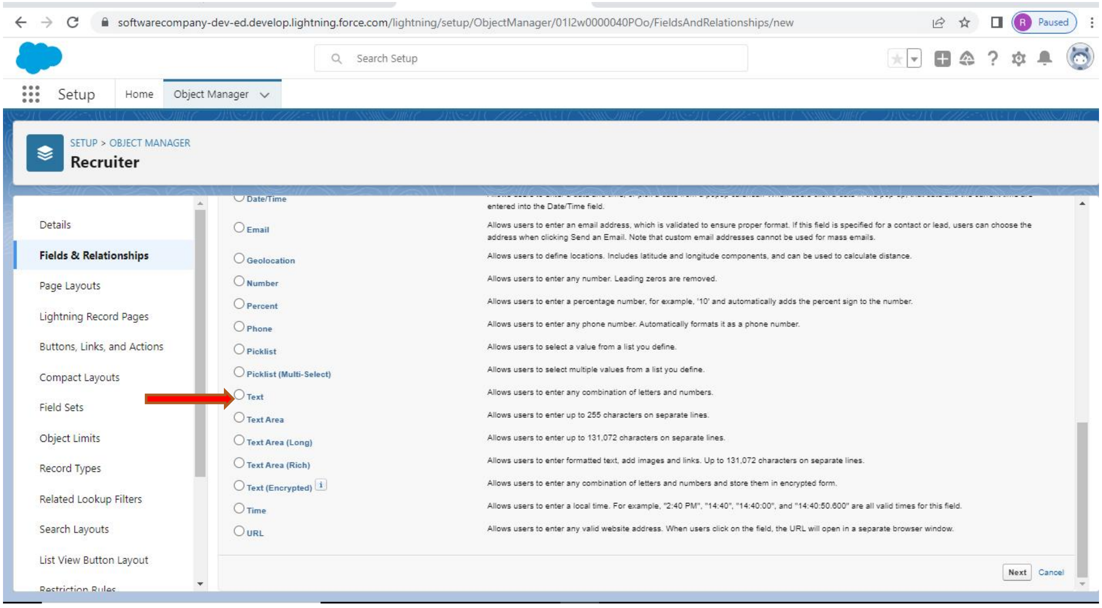
Creating the custom fields:

- Click the object manager tab And Then Select the object for which I have to create the fields and relationships.
- From the sidebar, click Fields & Relationships.

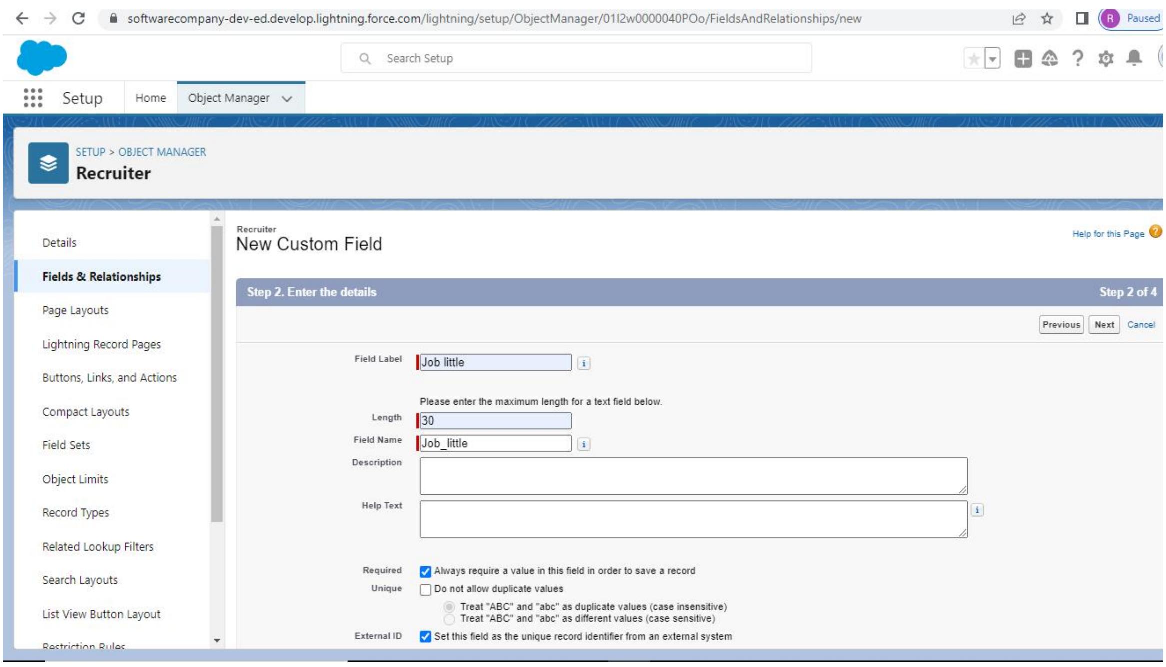




- Click on the new to create a field.
- Choose the data type as a Text And Then click next.



- Enter field label, length and Name and click next.



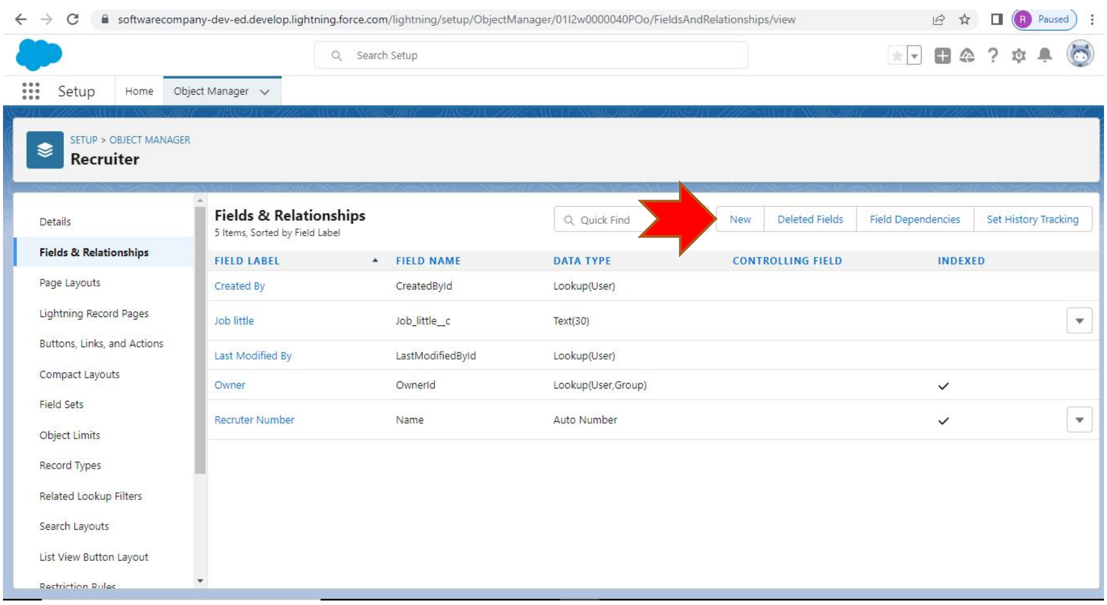
- Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security. Click next

- Select the page layouts that should include this field.Click save

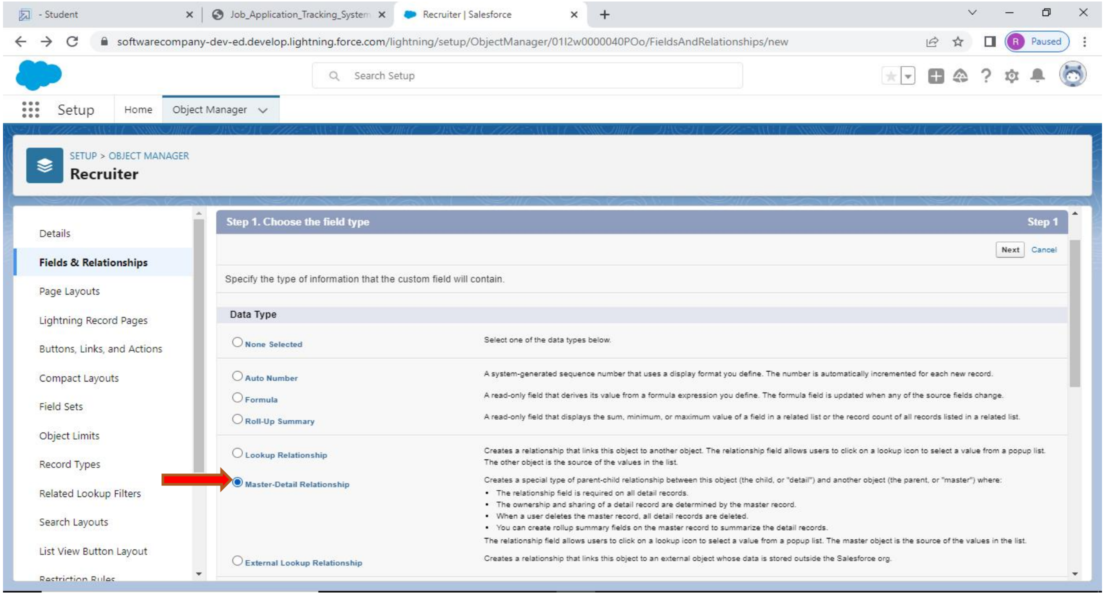
Activity 2:

Creation of Master-detail relationship:

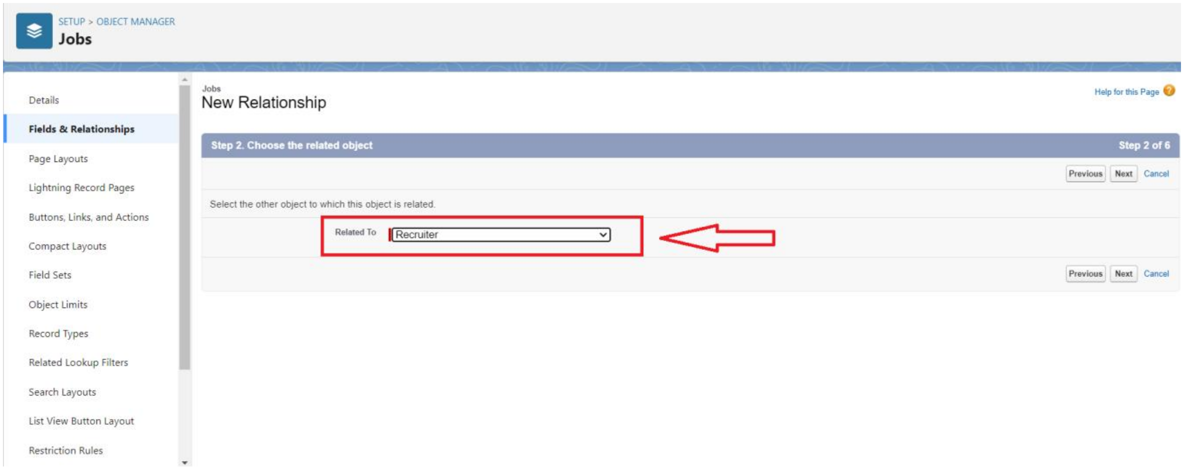
- From Setup, go to Object Manager
- On the sidebar, click Fields & Relationships.
- Click New.



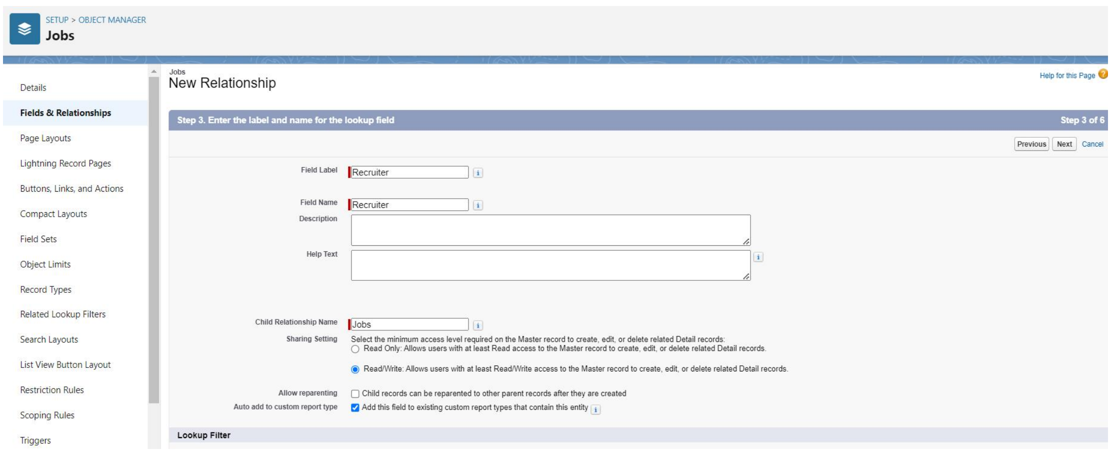
- Choose Master-detail Relationship and click Next



- Choose the related object and select that object.



- Enter the label and name for the lookup field.

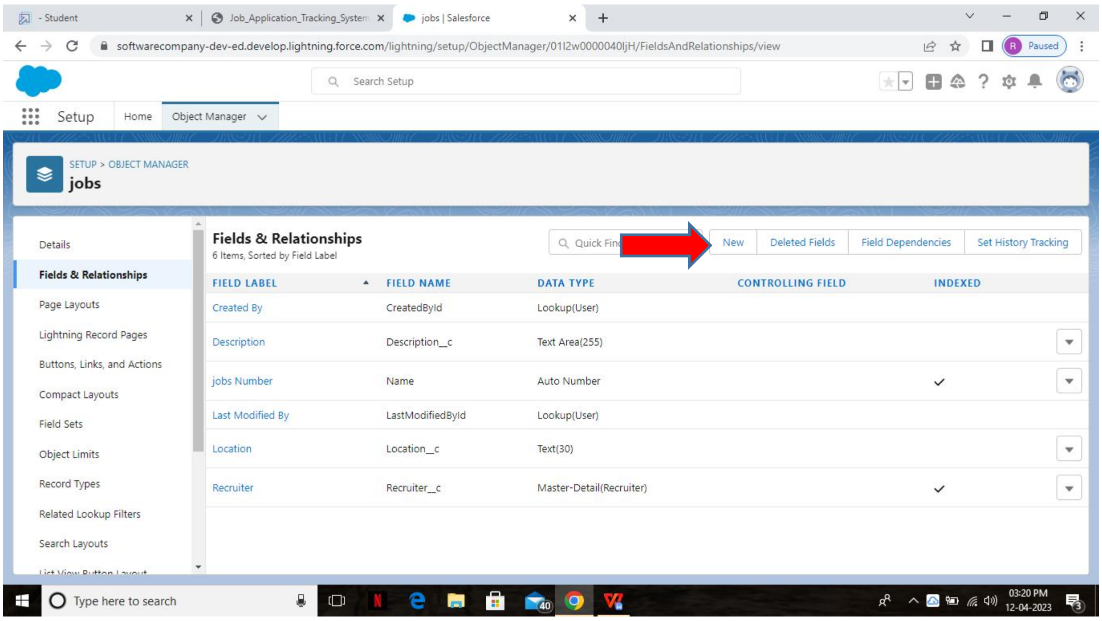


● Click Next, Next, and Save.

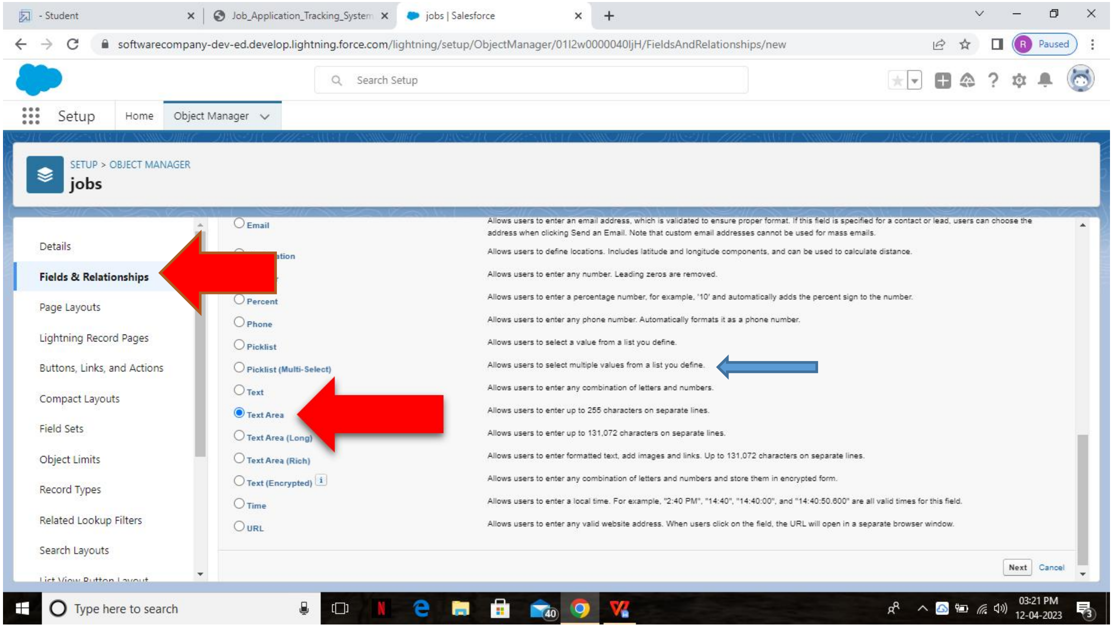
Activity 3:

Create a new custom field:

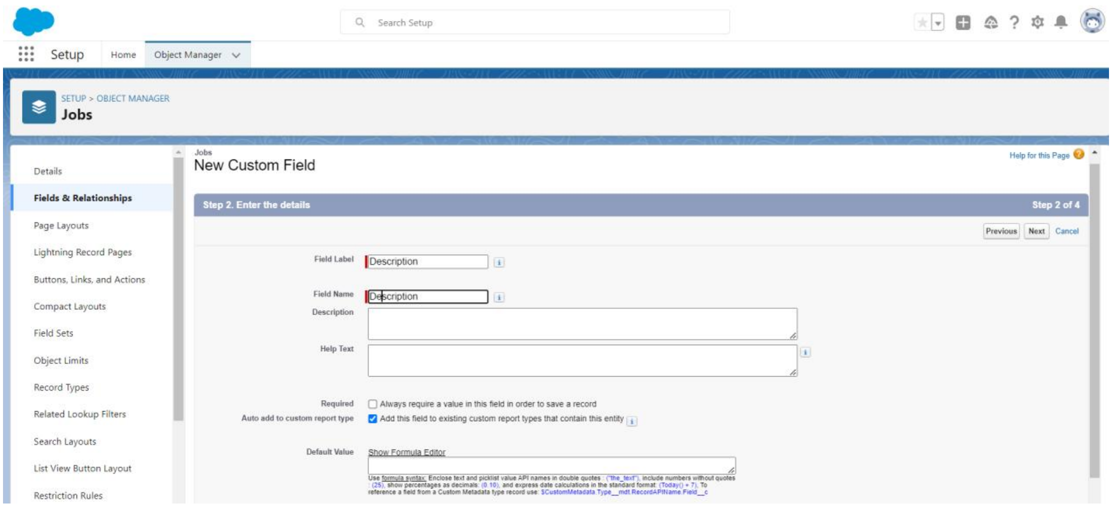
- From Setup, go to Object Manager
- On the sidebar, click Fields & Relationships.
- Click New.



- Choose the data type Text Area click next



- **Enter the Field Label and field name click next**



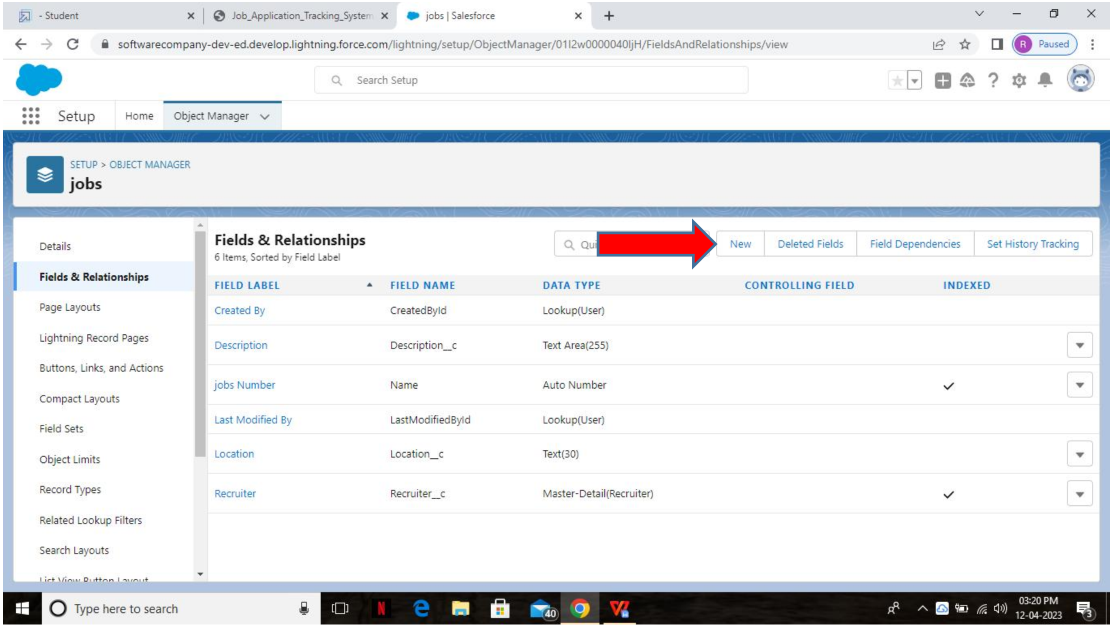
- Click next and save.

Activity 4:

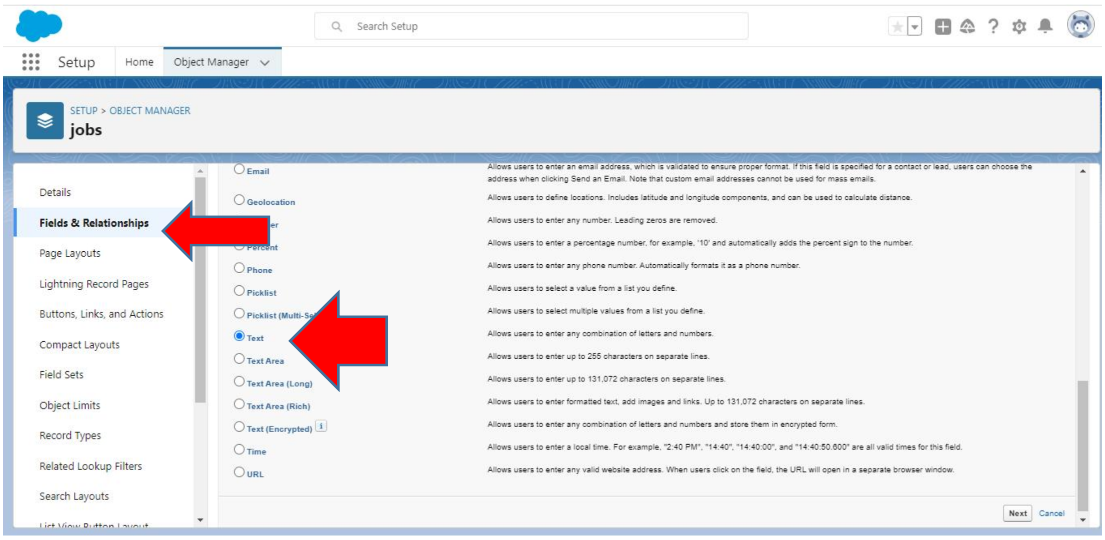
Create a new custom field:

- From Setup, go to Object Manager

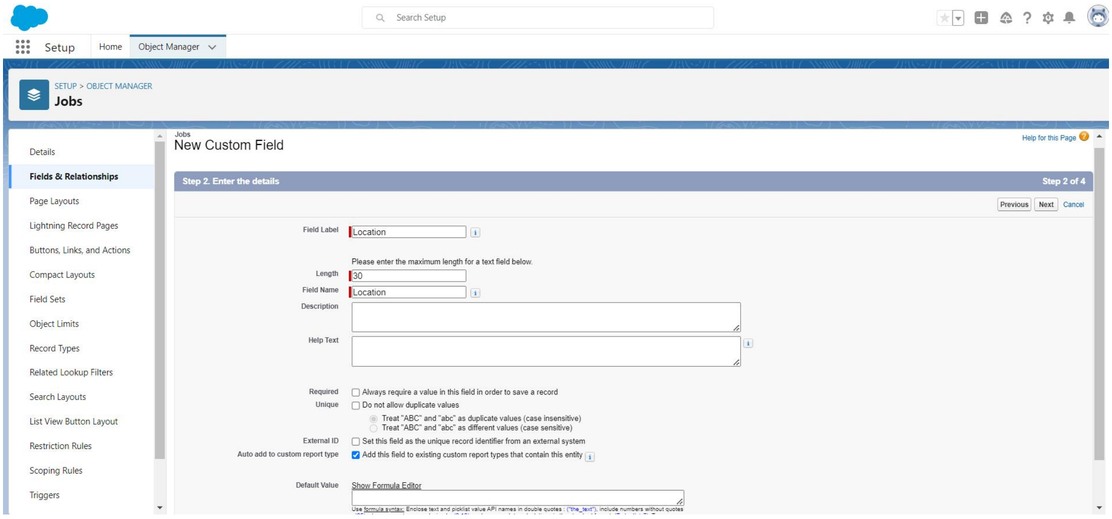
- On the sidebar, click Fields & Relationships.
- Click New.



- Choose the data type Text click next.



- Enter the Field Label and field name click next.



- Click next and save.

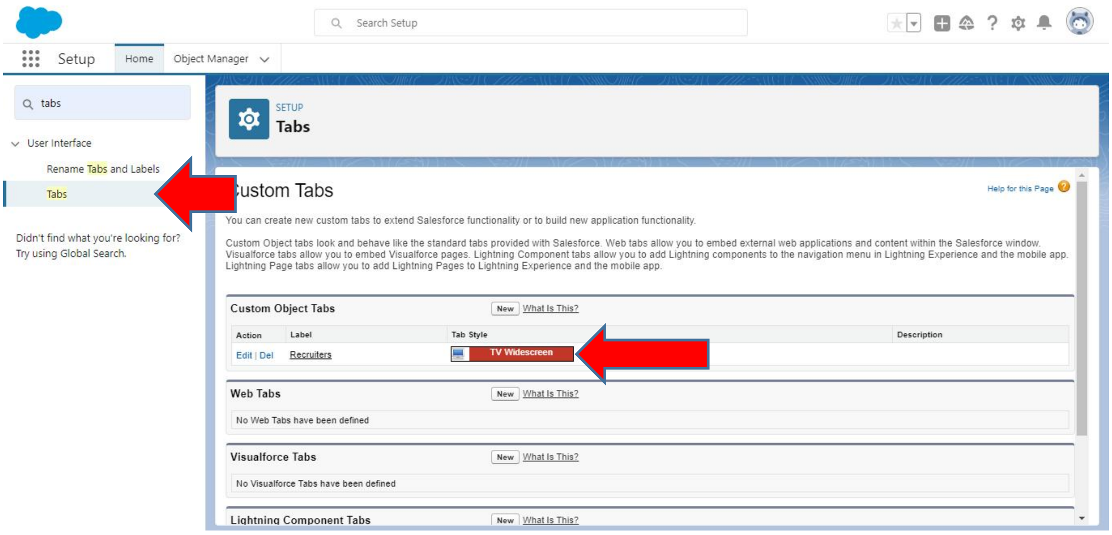
Milestone 4-Tab:

Activity 1 :

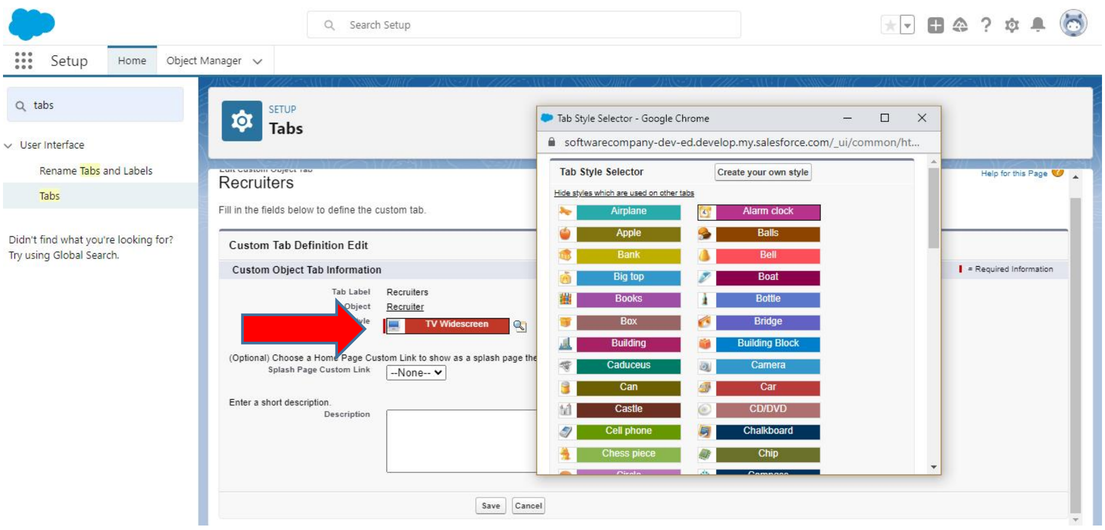
Create a tab :

- Click setup

- Search tab in Quick box then, select tab
- Click New custom object tab section



- Select the created object Recruiter and tab style for the new custom tab



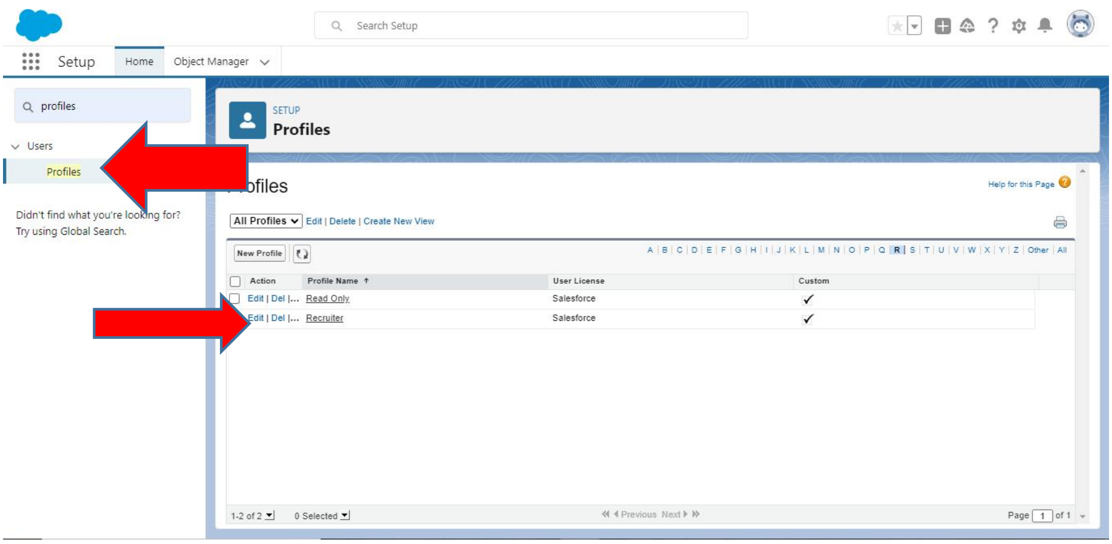
- Select the profiles that visible in the tab
- Click on custom apps to make visible.
- Click save.

Milestone 5- Profile:

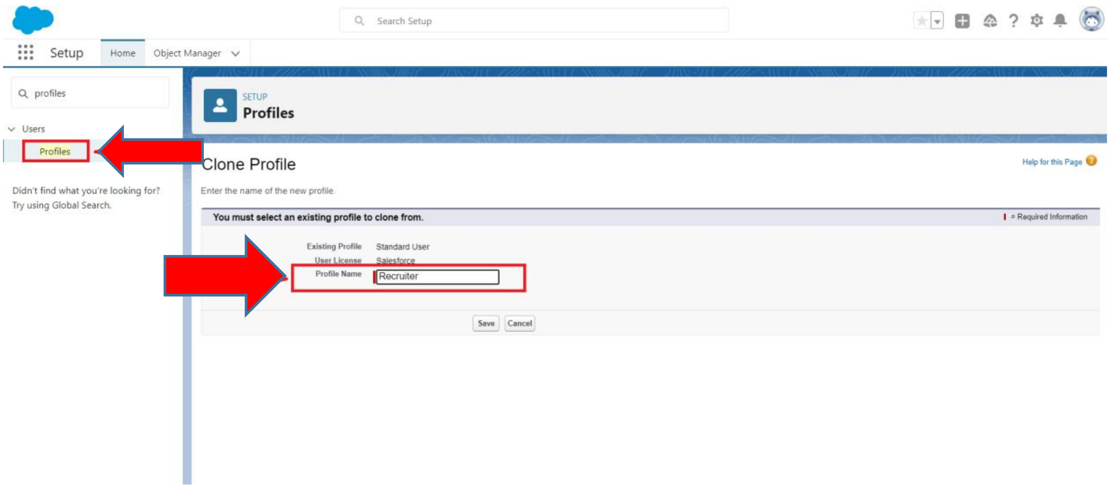
Activity 1:

Create a custom profile :

- From setup , enter profiles in Quick Find box
- Select profiles.
- Click clone.



- For Profile, enter Recruiter.



- Click save.

Activity 2:

Create a profile with the profile name as "Sales Manager".Follow the steps from above Activity.

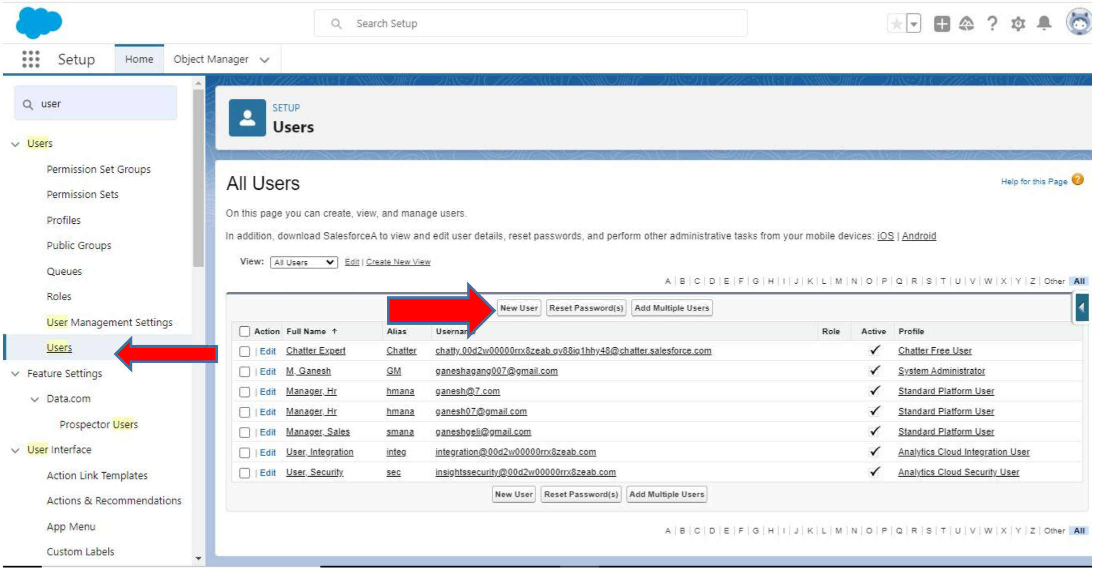
Milestone 6-User :

Activity 1:

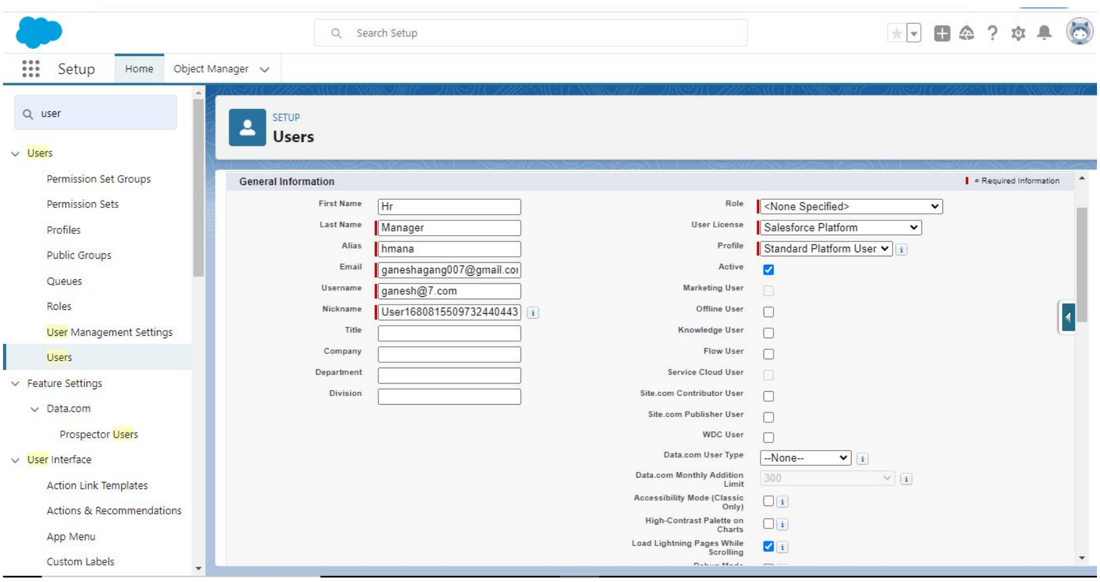
To Create a user:

- From Setup, enter Users in the Quick Find box, then select Users.

- Click New User.



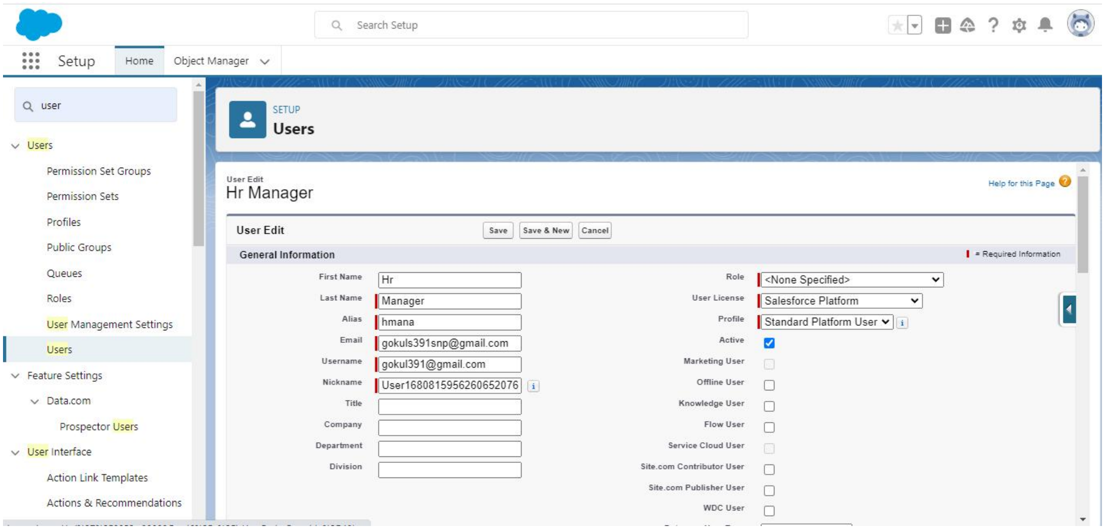
- Enter First name as Hr and last name as Manager.
- Enter the user's name and email address and a unique username in the form of an email address.
- Then create a new role Hr Manager.
- Select user License as Standard Platform User.
- Select profile.



- Click save

Activity 2:

Creating a user with a username as “Ganesh Gelli”, and assign him the sales Manager profile. Follow the steps from above Activity.

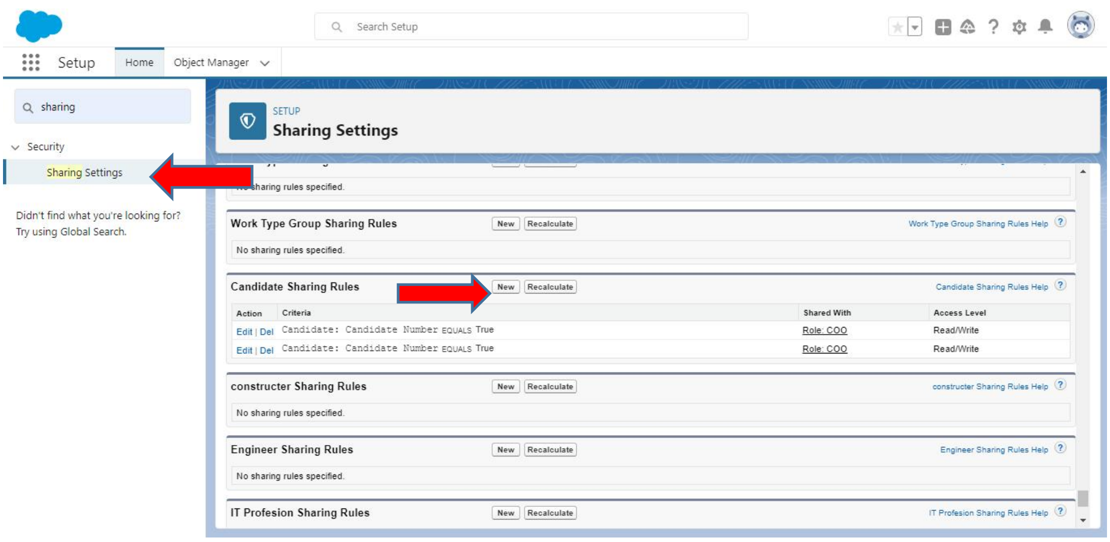


Milestone 7-Sharing Rules:

Create a sharing rule.

- Go to Sharing Settings, which can be found under the Quick Find section.

- 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.



- Add the label of the sharing rule you want to make.

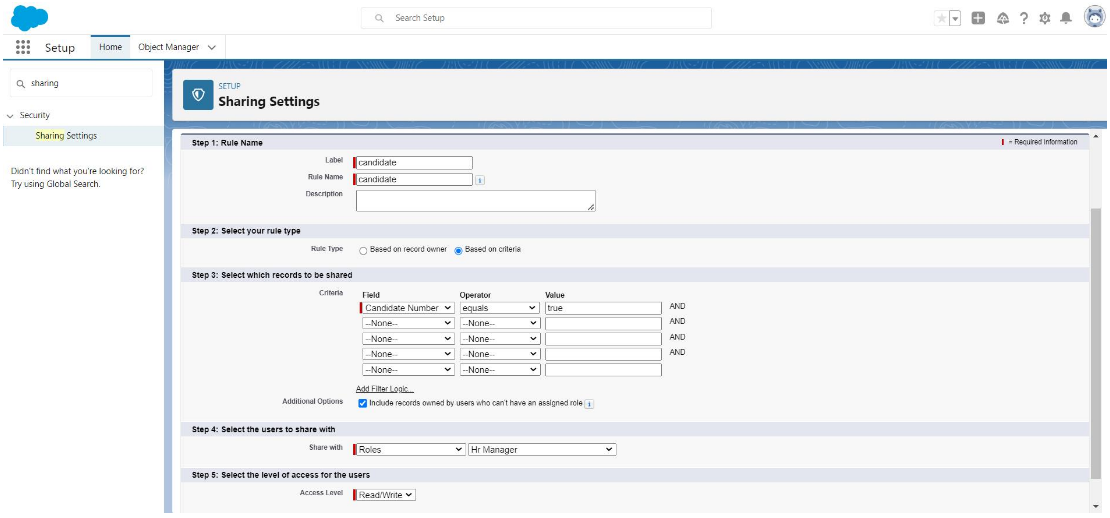
- Select your rule type based on the criteria.

- Select the field can join immediately check field from the candidate object.

- Select the operator as equal and value is true.

- And in selecting the users to share with the section select roles and in that select Hr Manager.

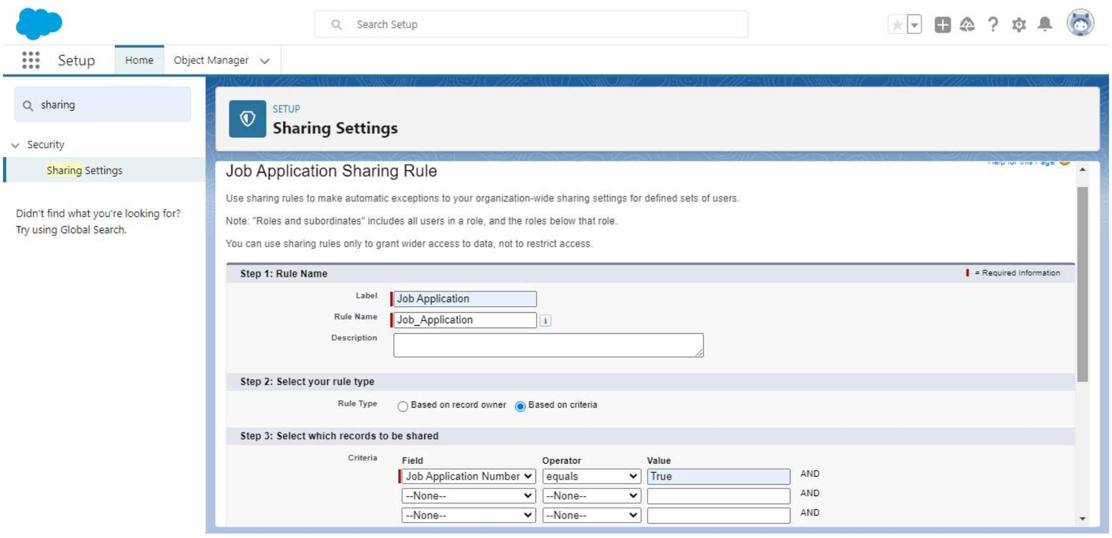
- And in the section of select the level of access for the users give the access Read/Write.

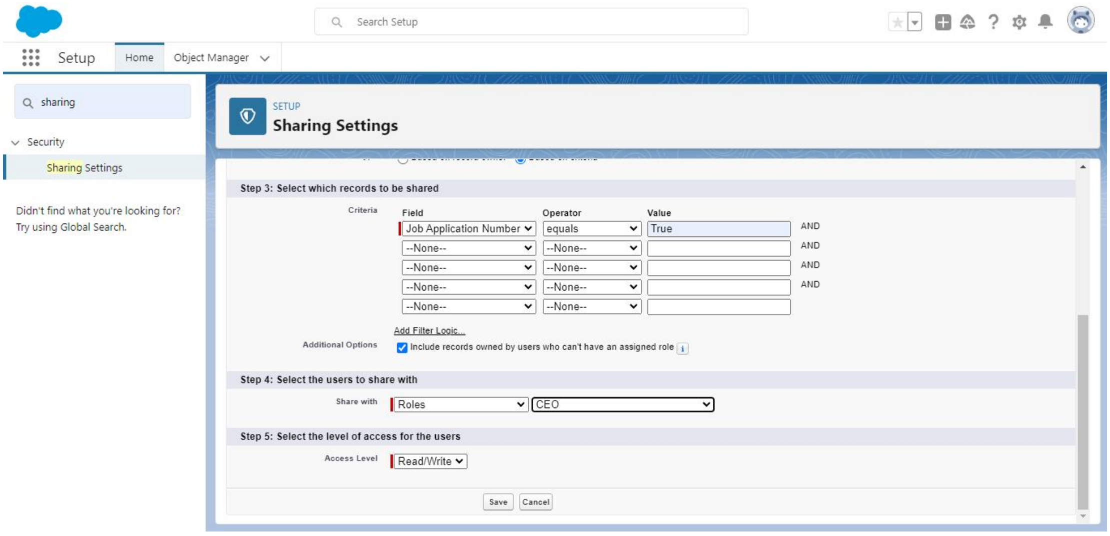


- And save the rule.

Activity 2:

Creating a Sharing Rule to Share the records of Job Application to Hr Manager with the Access of Read/Write. Follow the steps from above Activity.





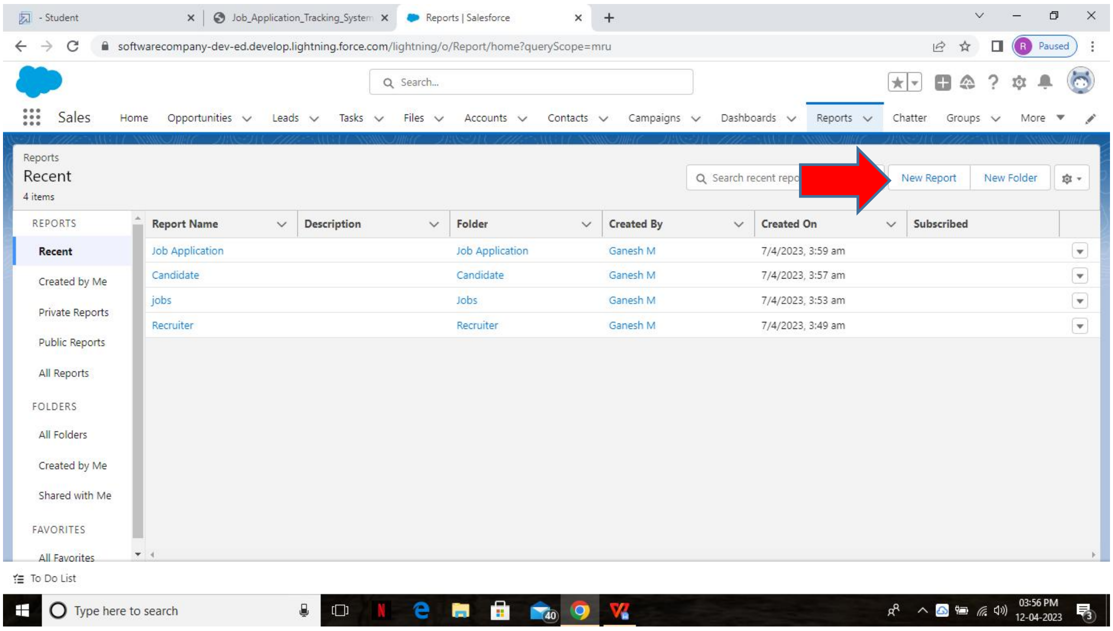
Milestone 8-Reports:

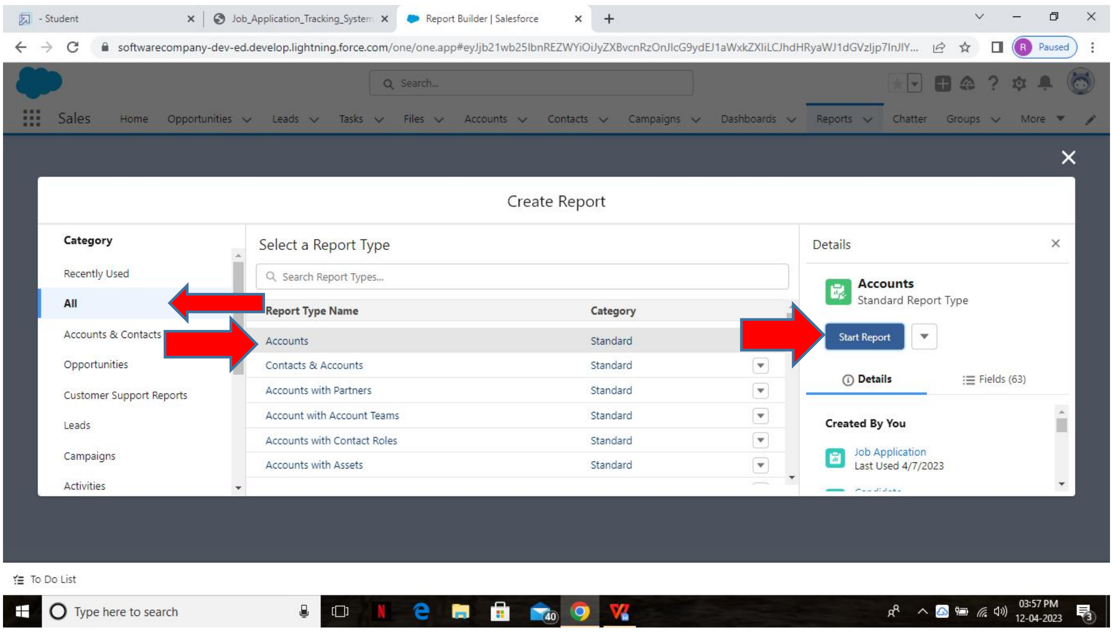
Activity 1:

Create a report:

Creating a report that displays rating of the account and which has type and account name.

- Click on app launcher search for reports.
- Click on the new report and select the category has accounts and contacts.



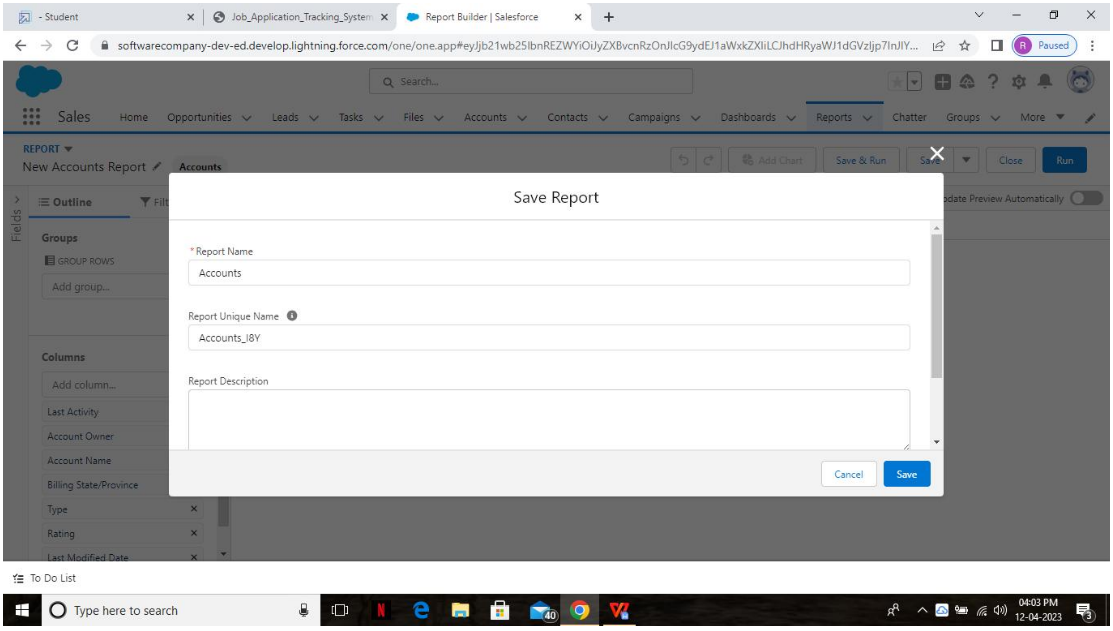


- And the report type has accounts.
- In the details section select the option start report.
- In the filter pane select A ll accounts to show me.

● And A ll time is created.

● In the outline pane, group rows select Rating and in group columns select Account Name.

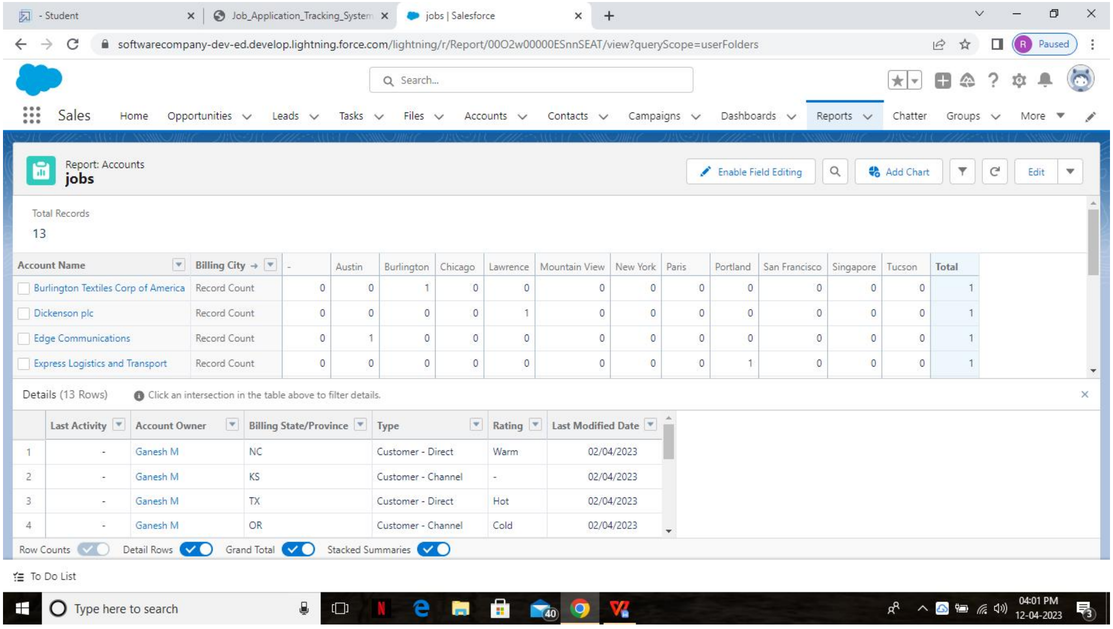
● In the columns section add Type and Billing city.



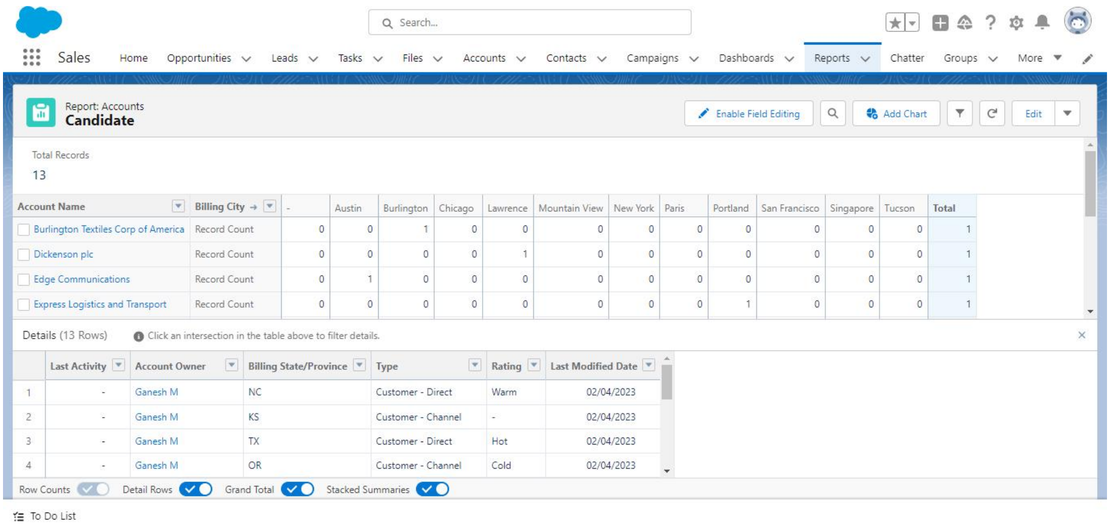
Activity 2:

Creating a Report using the Objects Jobs, Candidate and Job Application. Follow the steps from above Activity.

Jobs:


jobs | Salesforce
softwarecompany-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000ESnnSEAT/view?queryScope=userFolders
Sales
Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More
Report: Accounts
jobs
Enable Field Editing
Add Chart
Edit
Total Records
13
Account Name Billing City - Austin Burlington Chicago Lawrence Mountain View New York Paris Portland San Francisco Singapore Tucson Total
Burlington Textiles Corp of America Record Count 0 0 1 0 0 0 0 0 0 0 0 0 1
Dickenson plc Record Count 0 0 0 0 1 0 0 0 0 0 0 0 1
Edge Communications Record Count 0 1 0 0 0 0 0 0 0 0 0 0 1
Express Logistics and Transport Record Count 0 0 0 0 0 0 0 0 1 0 0 0 1
Details (13 Rows)
Click an intersection in the table above to filter details.
Last Activity Account Owner Billing State/Province Type Rating Last Modified Date
1 - Ganesh M NC Customer - Direct Warm 02/04/2023
2 - Ganesh M KS Customer - Channel - 02/04/2023
3 - Ganesh M TX Customer - Direct Hot 02/04/2023
4 - Ganesh M OR Customer - Channel Cold 02/04/2023
Row Counts Detail Rows Grand Total Stacked Summaries
To Do List
Type here to search
04:01 PM
12-04-2023

Candiates:


Sales
Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More
Report: Accounts
Candidate
Enable Field Editing
Add Chart
Edit
Total Records
13
Account Name Billing City - Austin Burlington Chicago Lawrence Mountain View New York Paris Portland San Francisco Singapore Tucson Total
Burlington Textiles Corp of America Record Count 0 0 1 0 0 0 0 0 0 0 0 0 1
Dickenson plc Record Count 0 0 0 0 1 0 0 0 0 0 0 0 1
Edge Communications Record Count 0 1 0 0 0 0 0 0 0 0 0 0 1
Express Logistics and Transport Record Count 0 0 0 0 0 0 0 0 1 0 0 0 1
Details (13 Rows)
Click an intersection in the table above to filter details.
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1 - Ganesh M NC Customer - Direct Warm 02/04/2023
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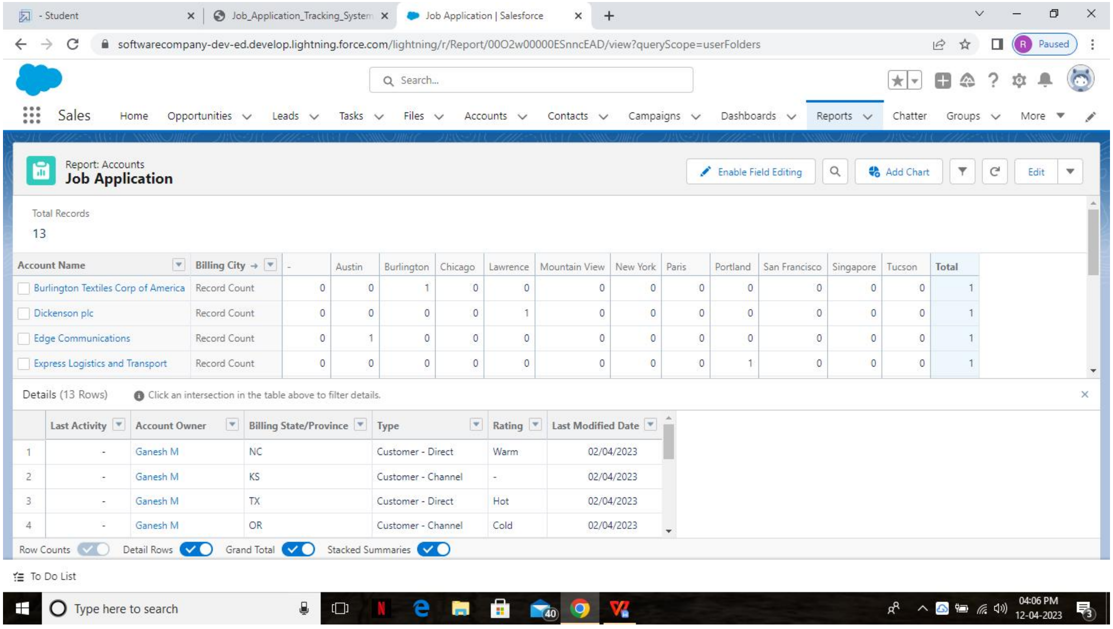
3 - Ganesh M TX Customer - Direct Hot 02/04/2023
4 - Ganesh M OR Customer - Channel Cold 02/04/2023
Row Counts Detail Rows Grand Total Stacked Summaries
To Do List

Job Application:



Thank You . . .