



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

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

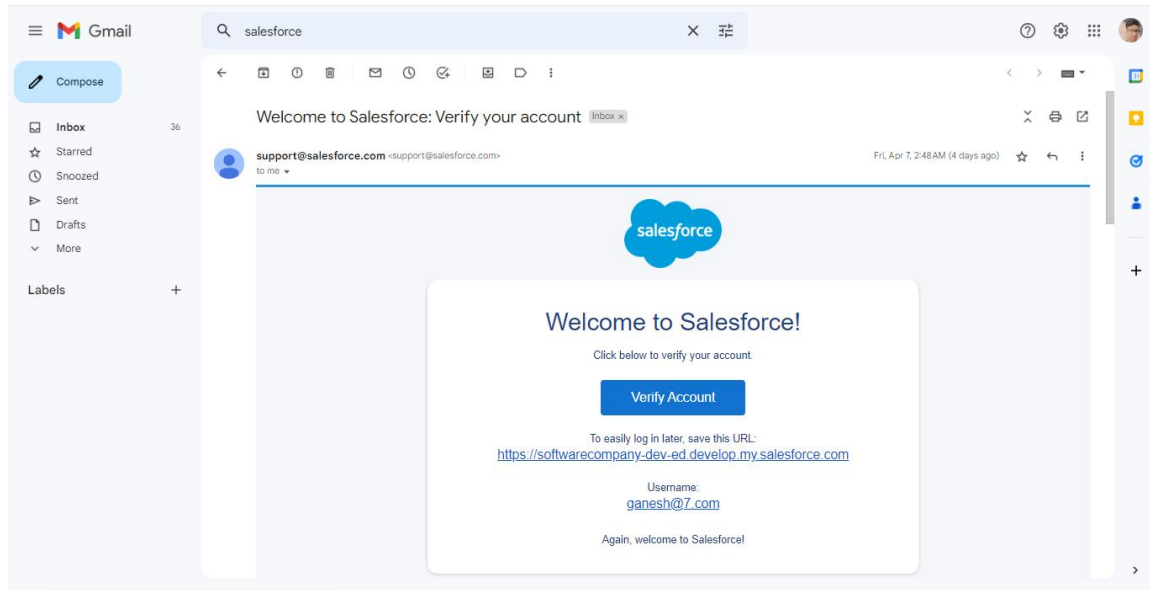
Last Name*
Your last name

Email*
Your email address

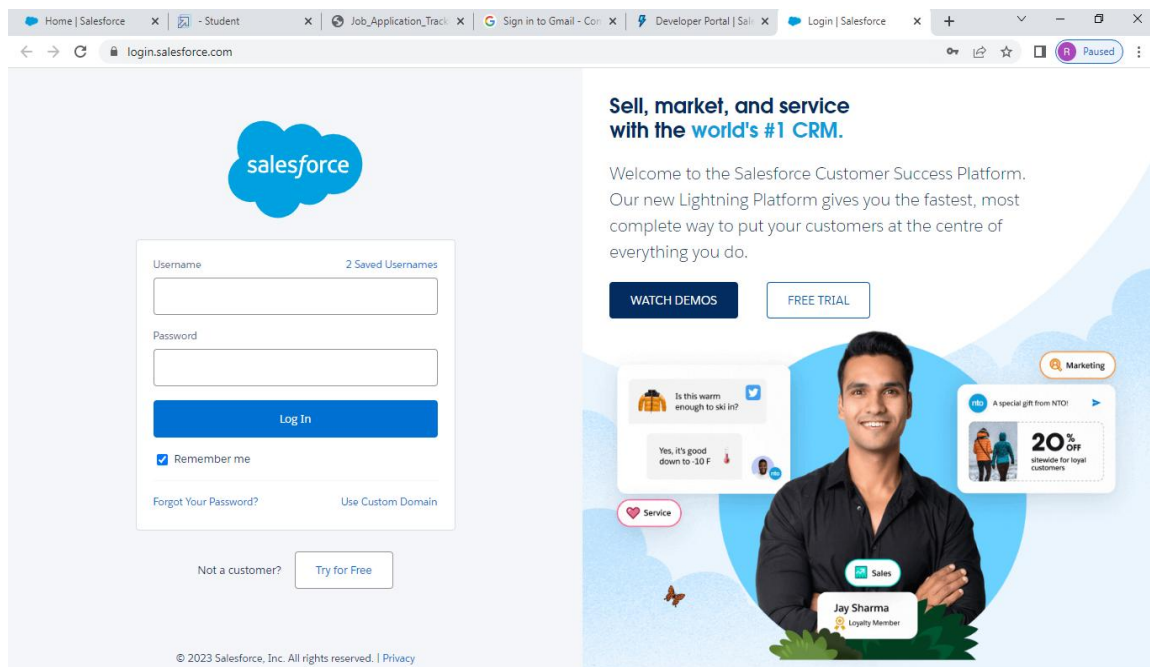
Role*
Your job role

Company*
Company Name

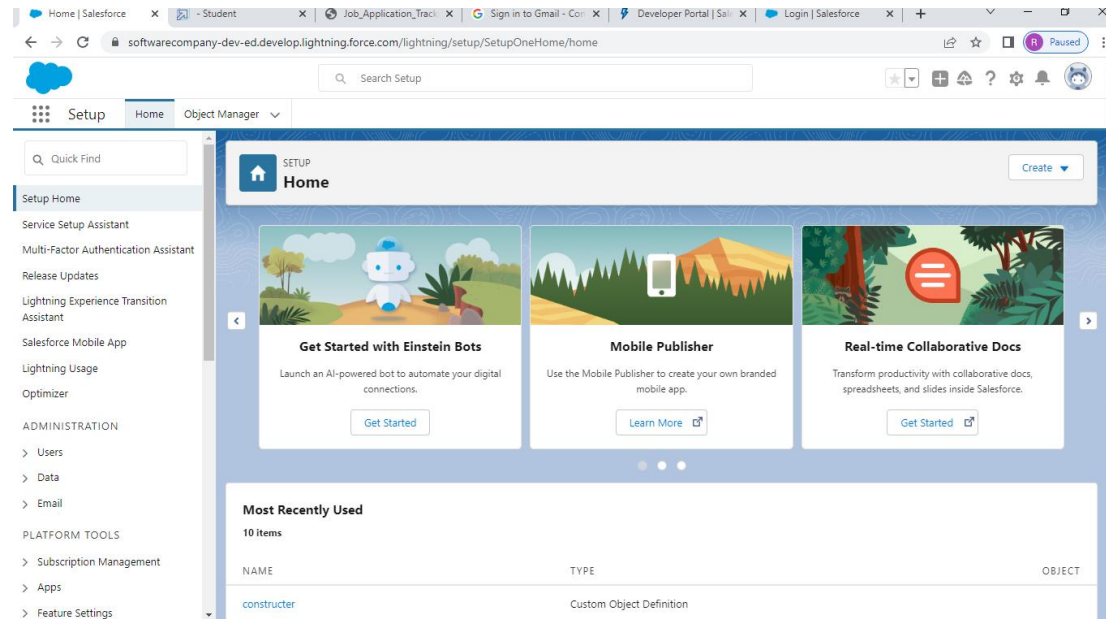
- Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.
- Click sign me up, after a few min you will receive a mail from Salesforce and by using the verify account link you can create your new password



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



The setup page will appear as below.



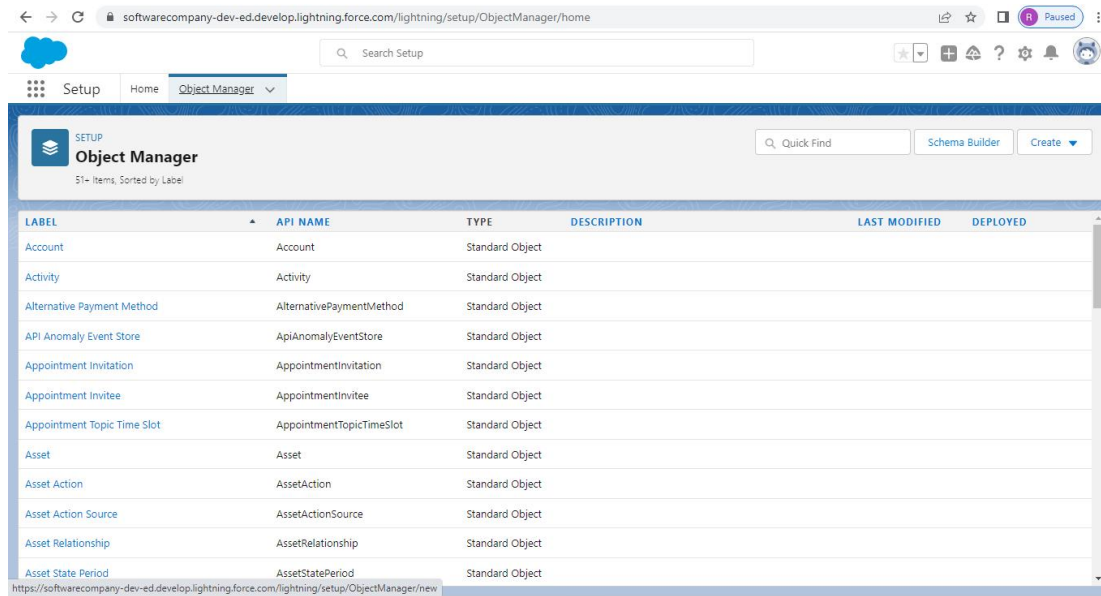
Milestone 2-Object:

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.**



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. Below this, the 'Object Manager' header includes a 'Quick Find' search bar, 'Schema Builder' link, and a 'Create' button. The main content area displays a table of standard objects, sorted by label. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed include Account, Activity, Alternative Payment Method, API Anomaly Event Store, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, Asset Action Source, Asset Relationship, and Asset State Period.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard 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.

softwarecompany-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

SETUP New Custom Object

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 Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name

softwarecompany-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

SETUP New Custom Object

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status [What is this?](#)

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☐ Allow Search

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

- 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

Setup Home Object Manager

SETUP 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

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name 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

Setup Home Object Manager

SETUP 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

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

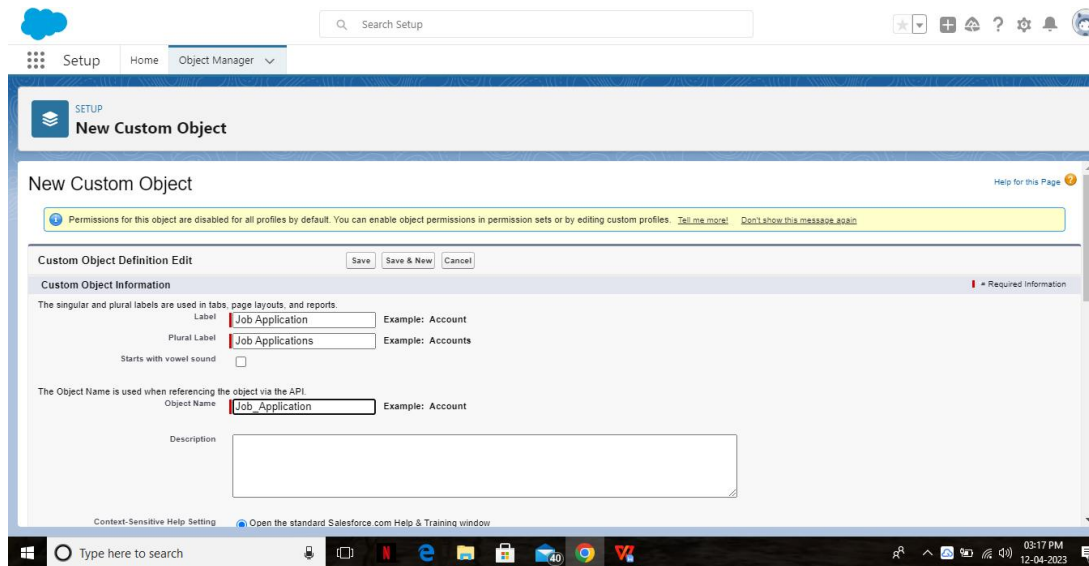
The Object Name is used when referencing the object via the API.

Object Name 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

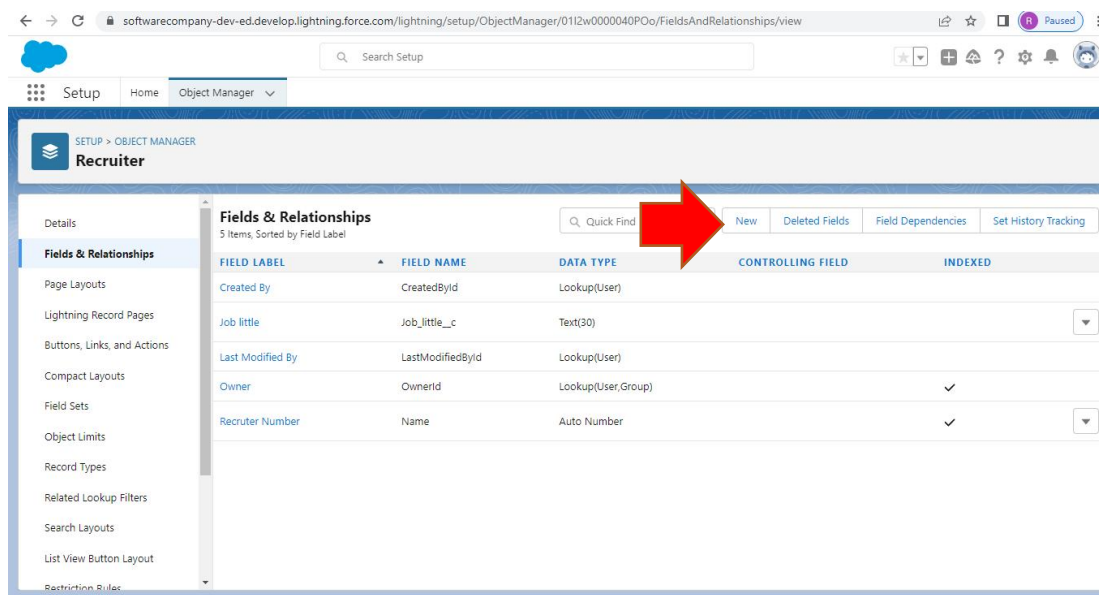
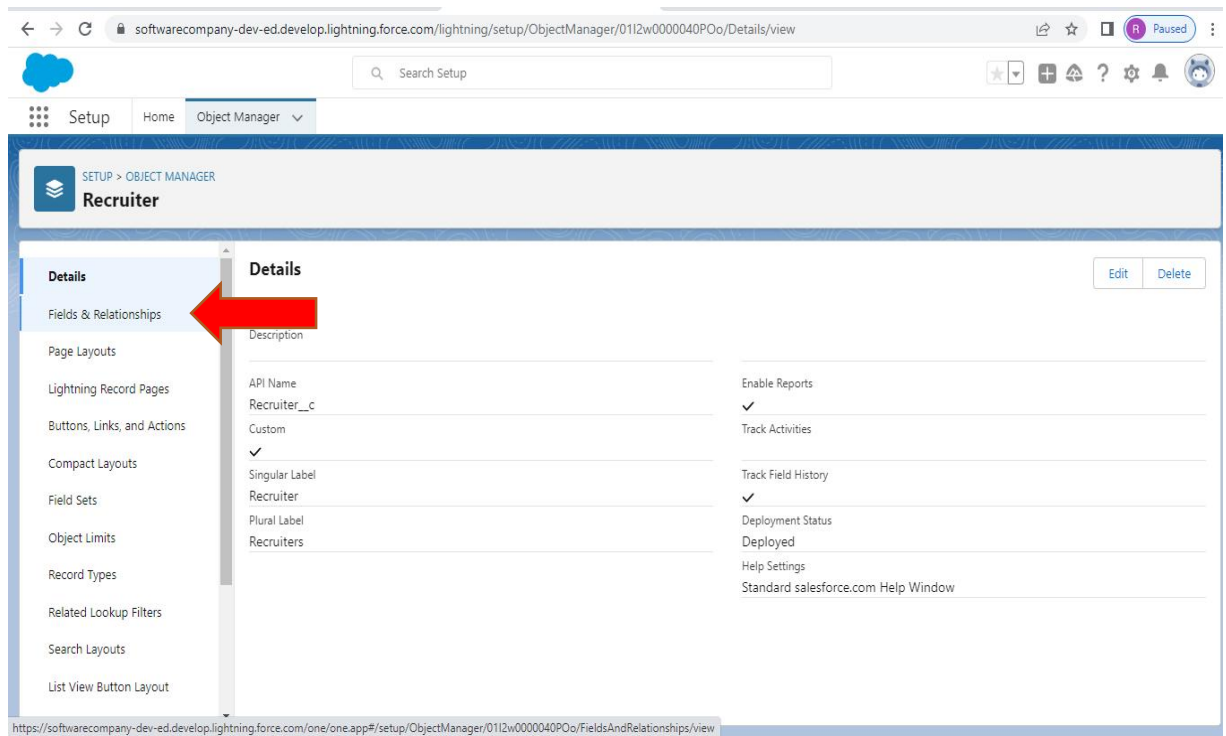


Milestone 3- Fields:

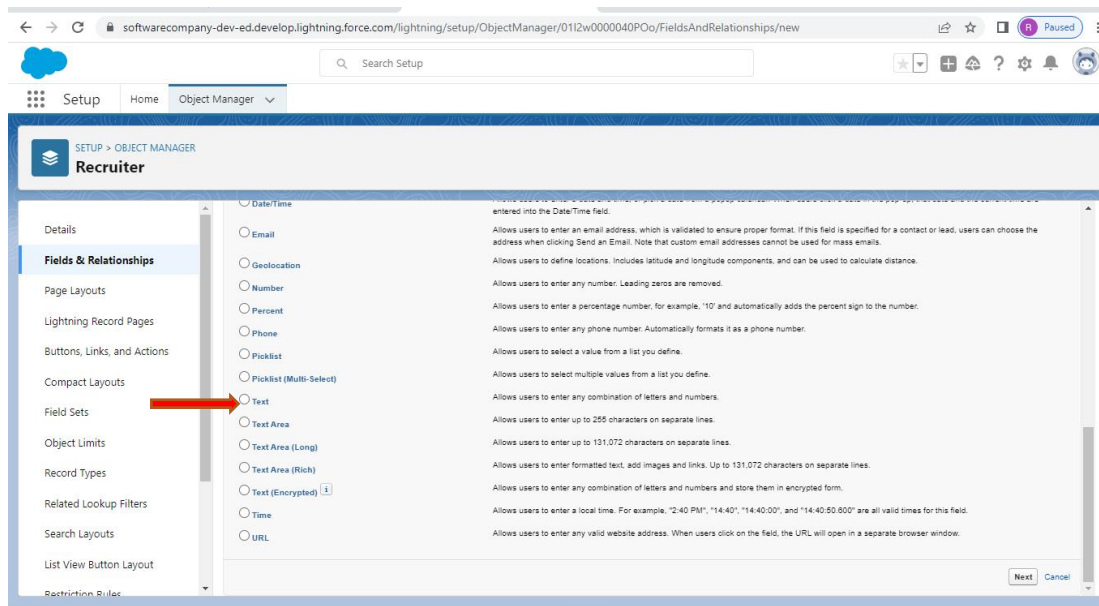
Activity 1:

Creating the custom fields:

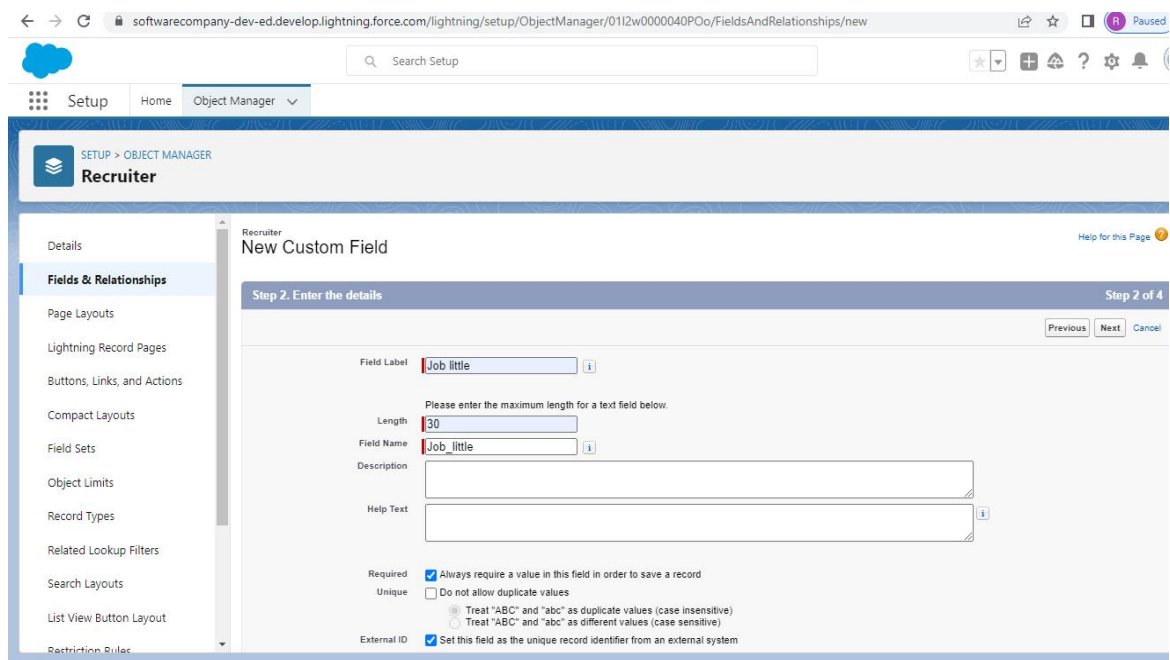
- Click the object manager tab And Then Select the object for which I have to create the fields and relationships.
- From the sidebar, click Fields & Relationships.



- 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.



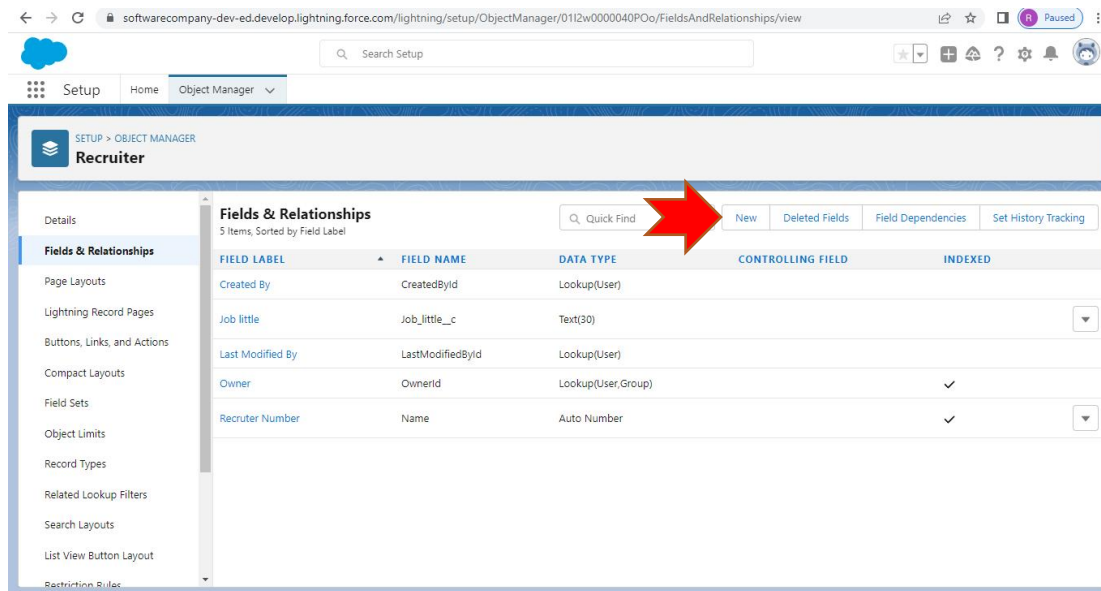
- Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security. Click next

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

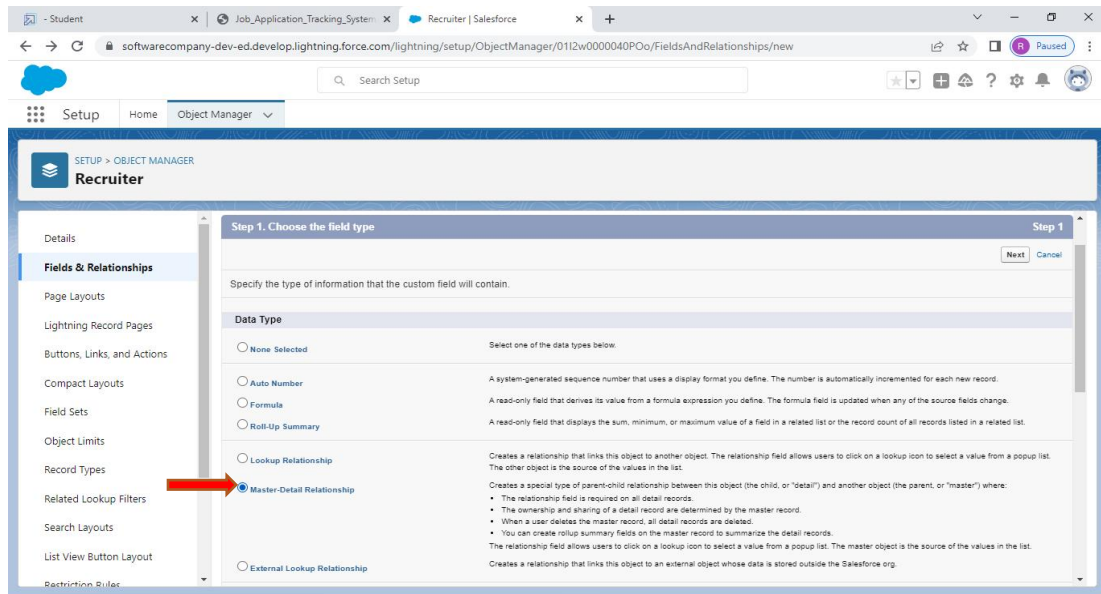
Activity 2:

Creation of Master-detail relationship:

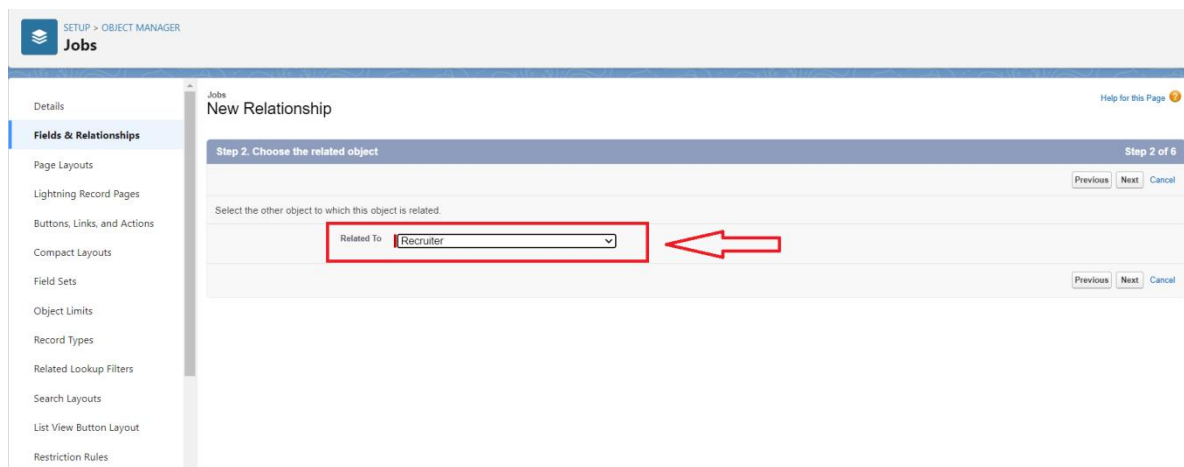
- From Setup, go to Object Manager
- On the sidebar, click Fields & Relationships.
- Click New.



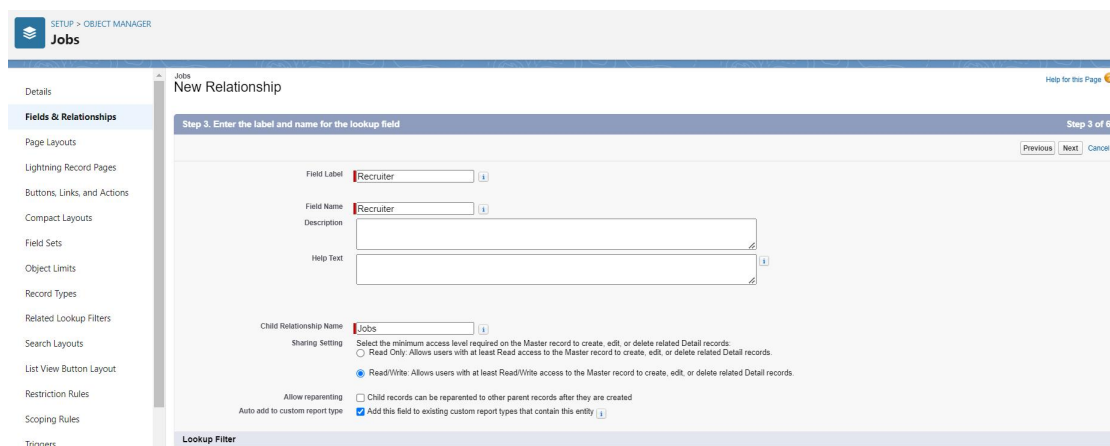
- Choose Master-detail Relationship and click Next



- Choose the related object and select that object.



- Enter the label and name for the lookup field.

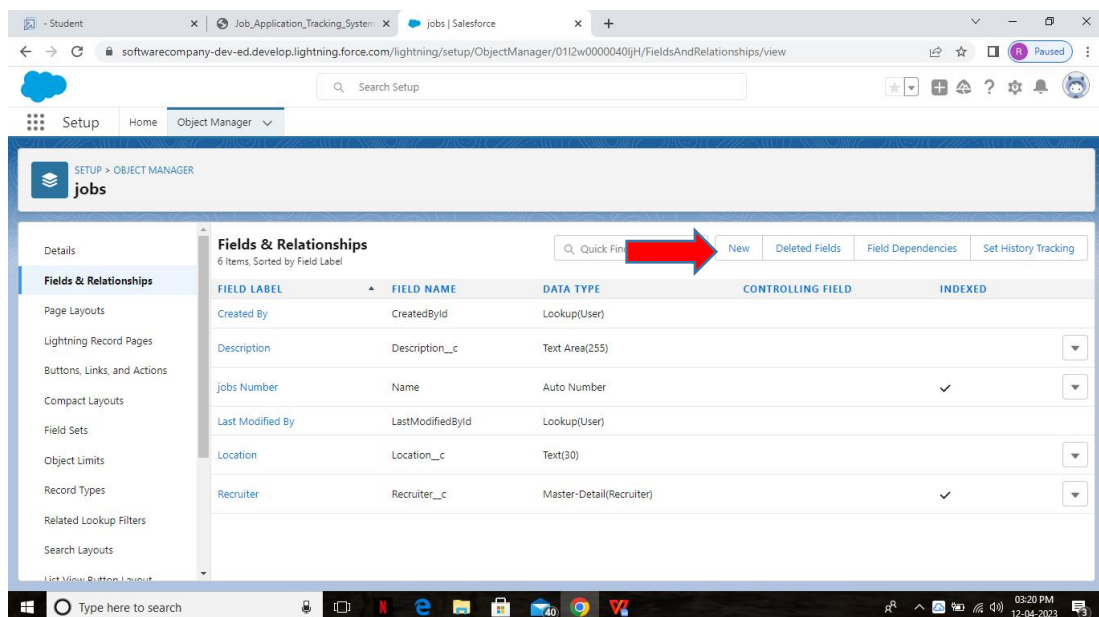


- Click Next, Next, and Save.

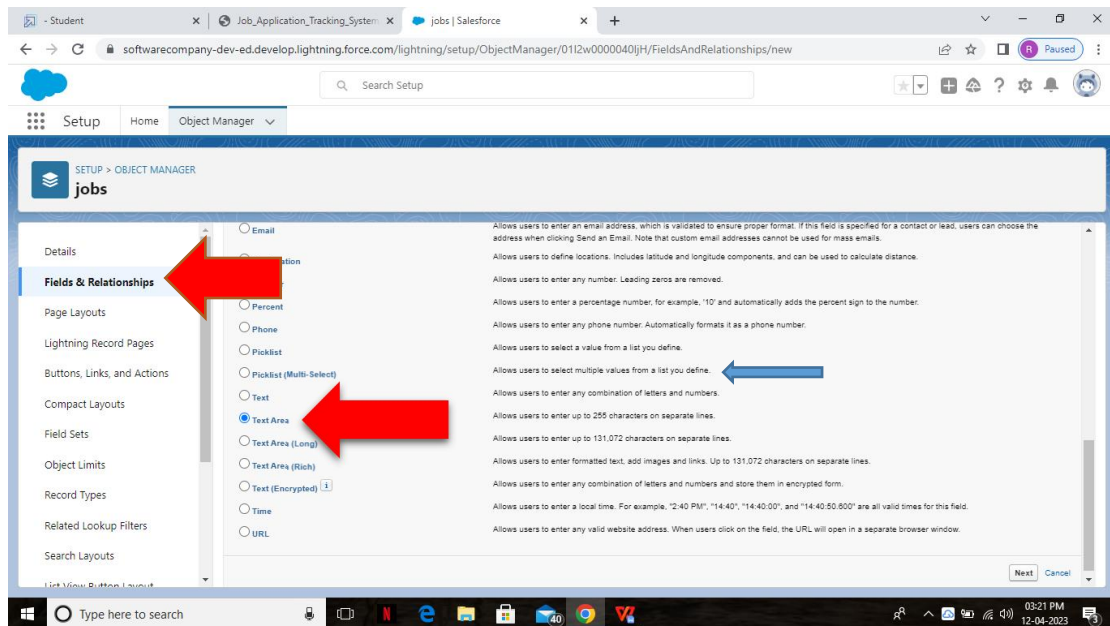
Activity 3:

Create a new custom field:

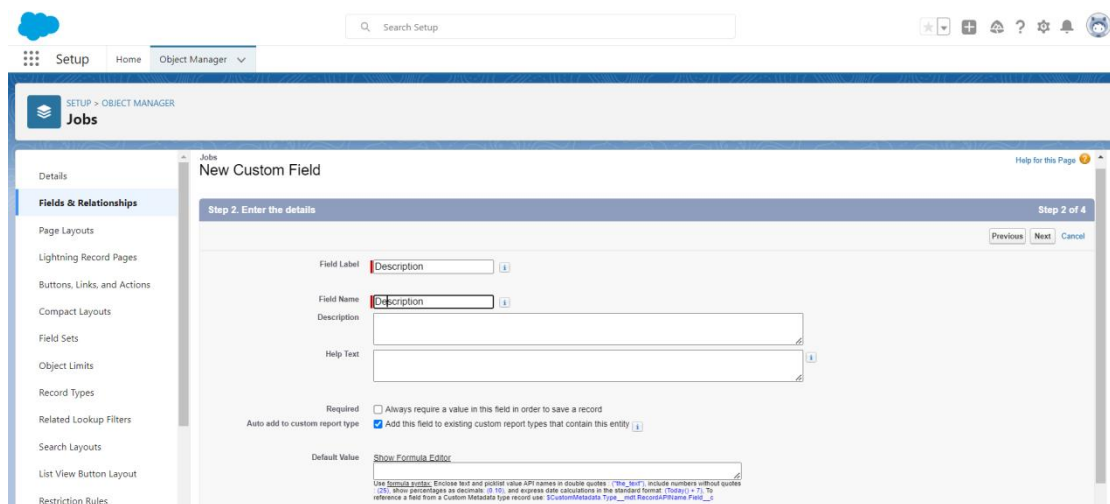
- From Setup, go to Object Manager
- On the sidebar, click Fields & Relationships.
- Click New.



- Choose the data type Text Area click next



● Enter the Field Label and field name click next



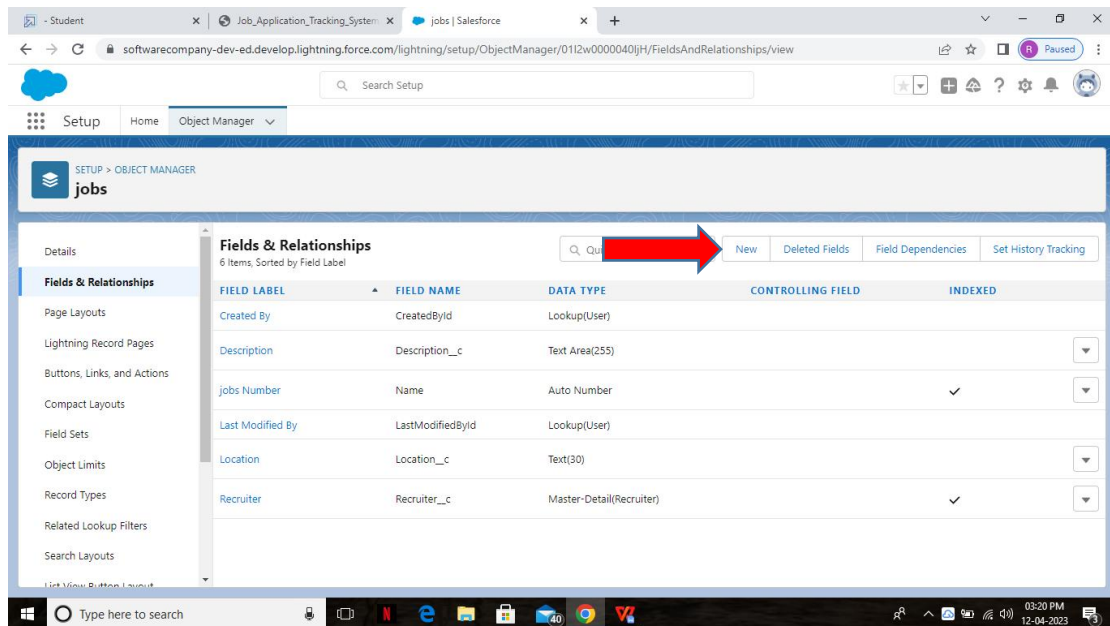
● Click next and save.

Activity 4:

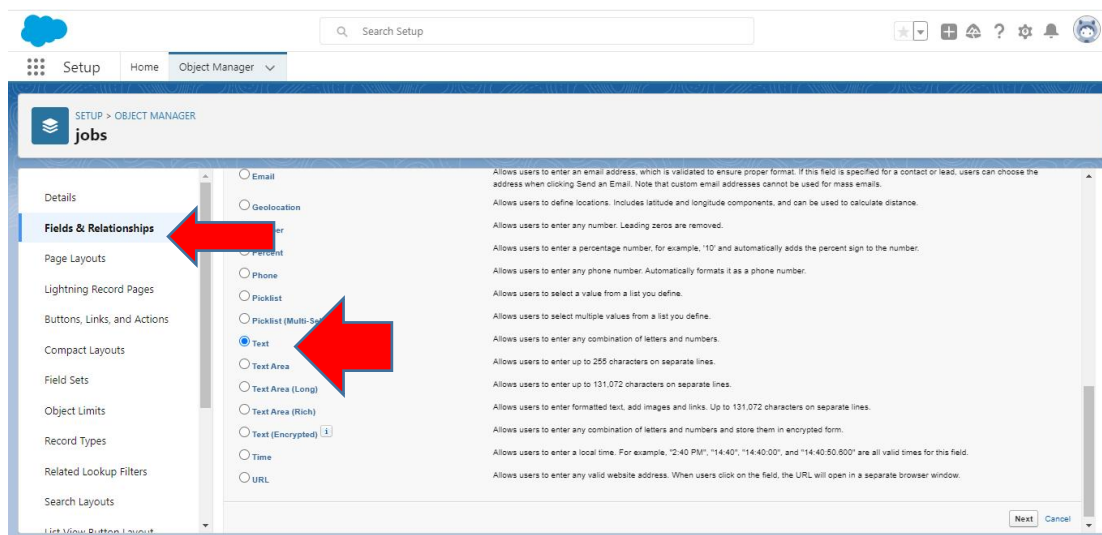
Create a new custom field:

● 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.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar is also present. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is titled 'New Custom Field' for the 'Jobs' object. It shows 'Step 2: Enter the details' of a 4-step process. The form includes fields for 'Field Label' (set to 'Location'), 'Length' (set to 30), 'Field Name' (set to 'Location'), 'Description', and 'Help Text'. There are checkboxes for 'Required' (unchecked), 'Unique' (unchecked), and 'External ID' (unchecked). A note indicates that the field will be added to existing custom report types. At the bottom, there's a 'Default Value' section with a 'Show Formula Editor' link.

- Click next and save.

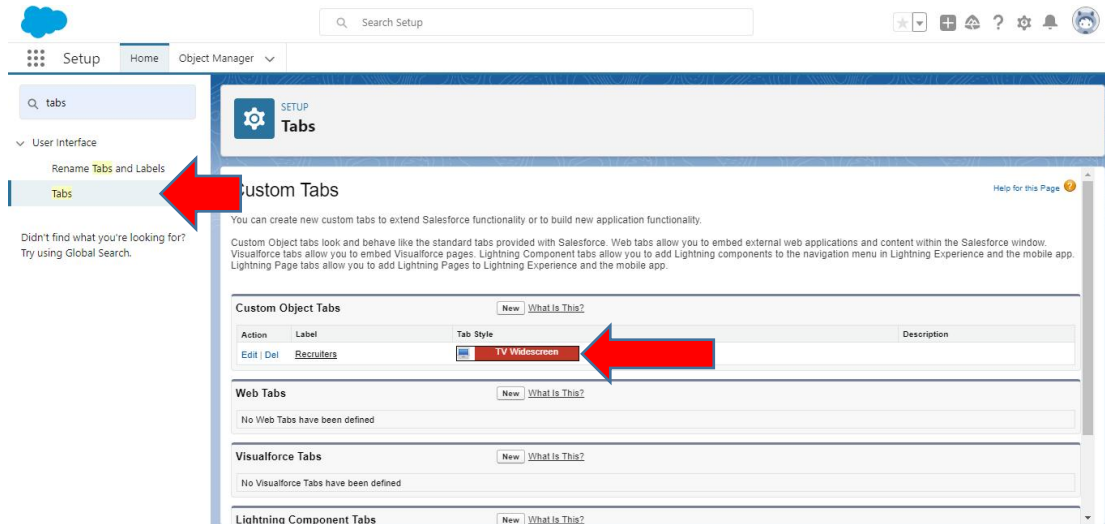
Milestone 4-Tab:

Activity 1 :

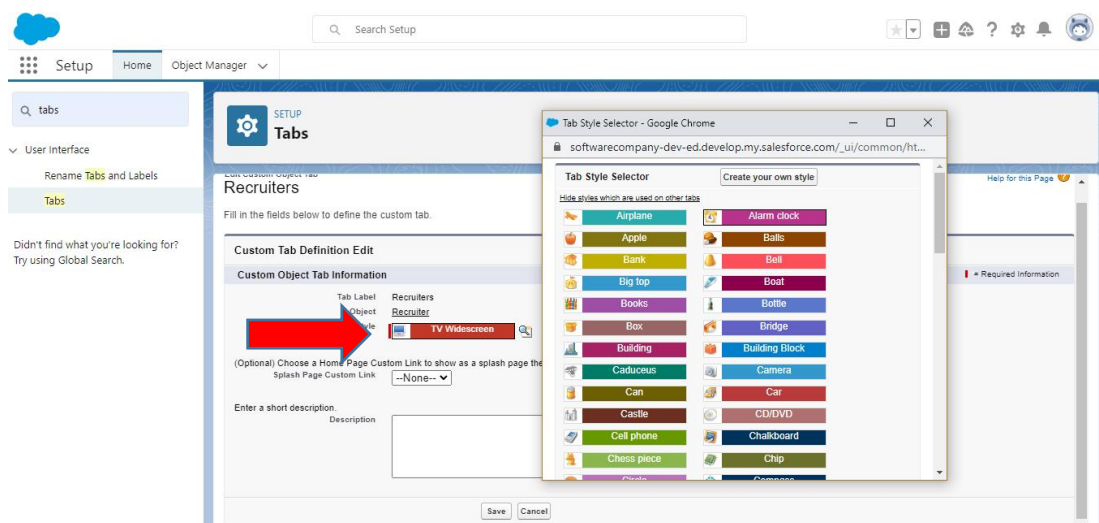
Create a tab :

- 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



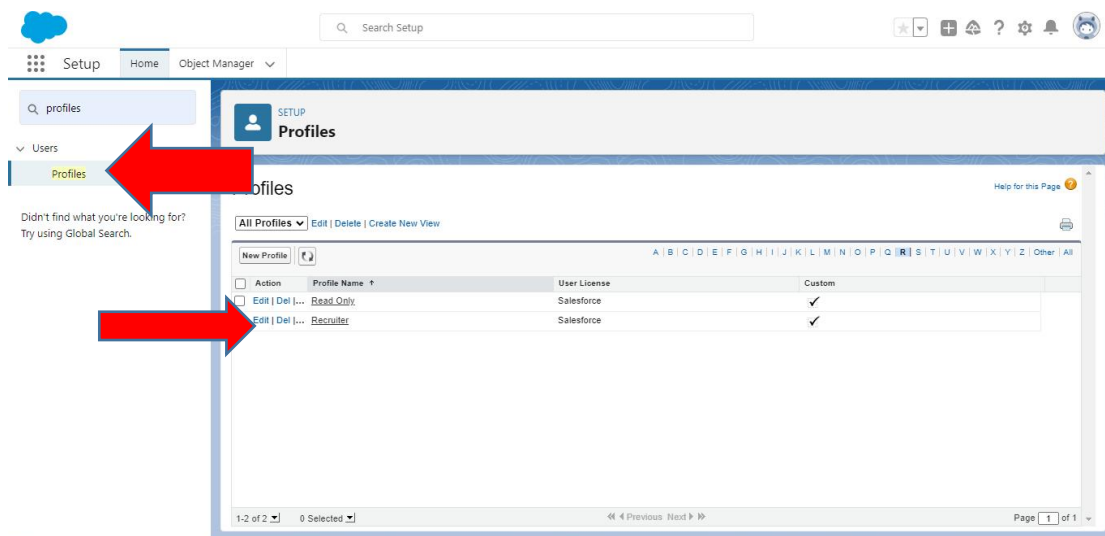
- Select the profiles that visible in the tab
- Click on custom apps to make visible.
- Click save.

Milestone 5- Profile:

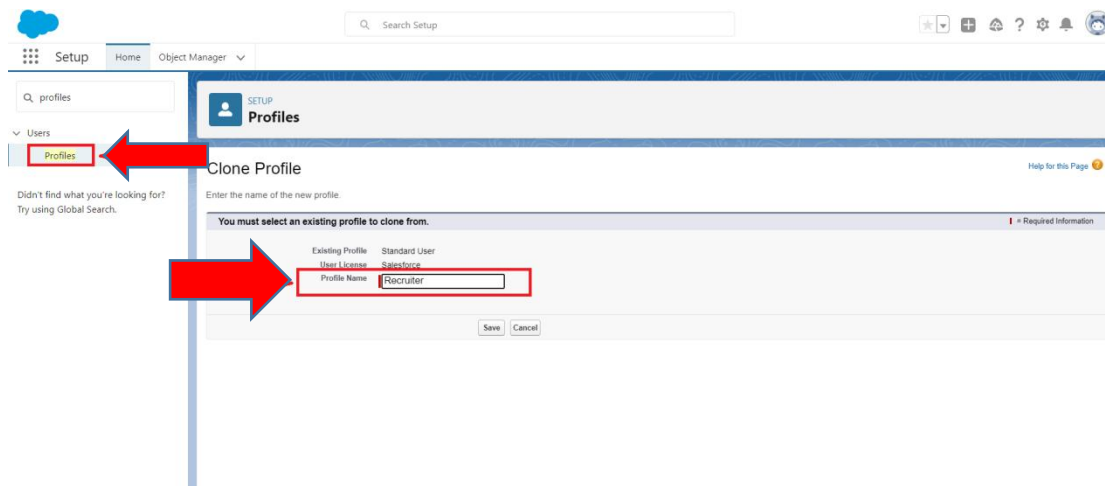
Activity 1:

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.

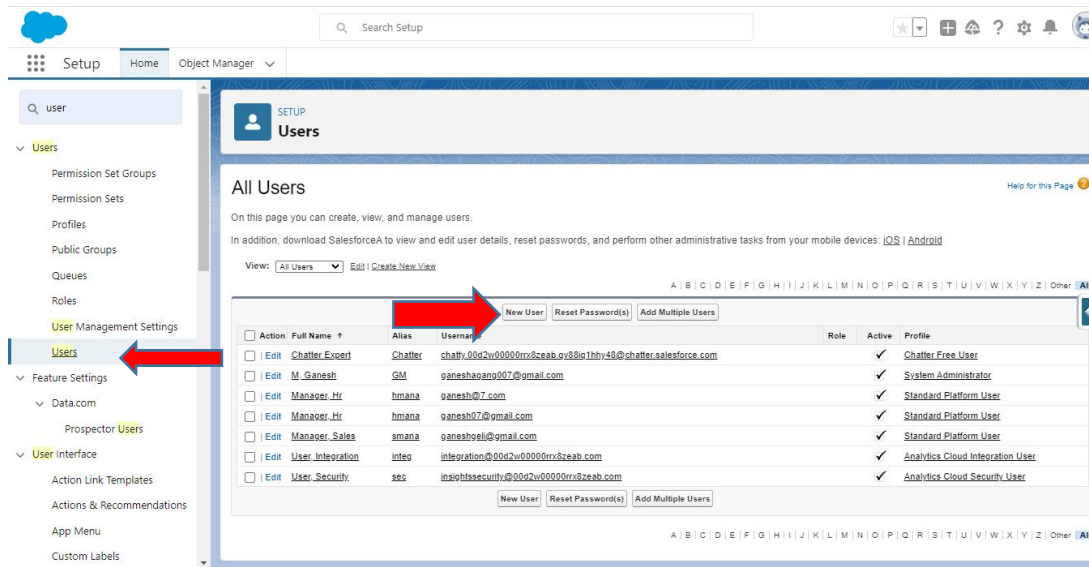
Milestone 6-User :

Activity 1:

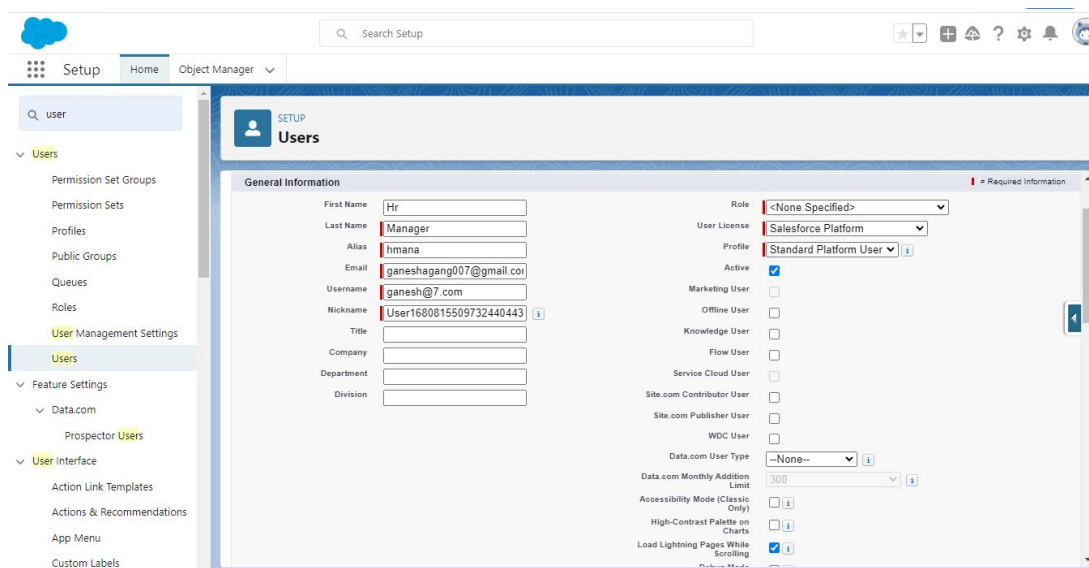
To Create a user:

- 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.

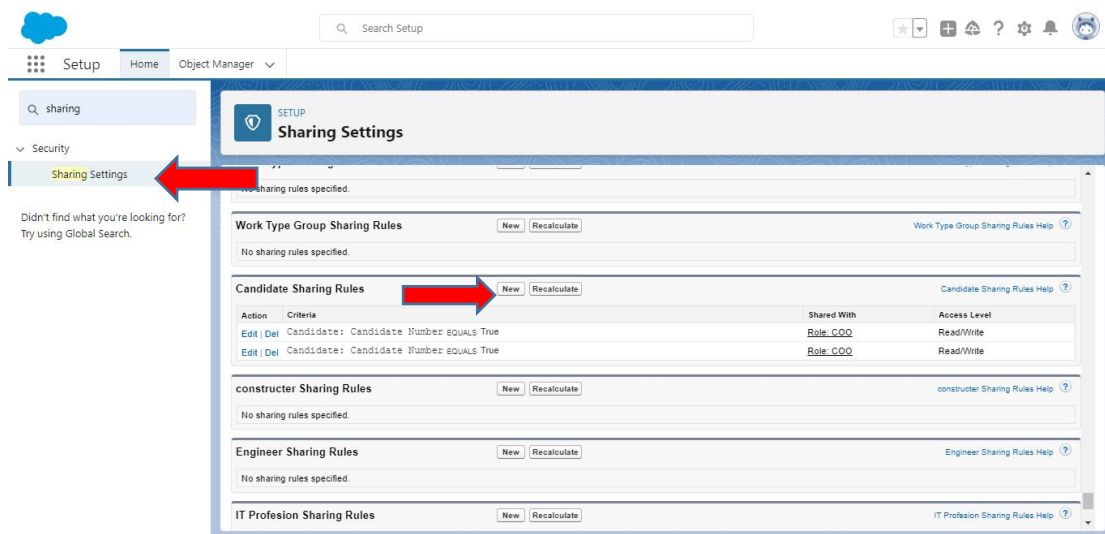
The screenshot shows the Salesforce Setup interface for user management. The left sidebar lists various setup options, with 'Users' highlighted. The main area displays the 'User Edit' form for a user named 'Hr Manager'. The form includes a 'General Information' section with fields for personal and organizational details. The 'Role' is currently set to '<None Specified>', and the 'Profile' is 'Standard Platform User'. The 'Active' checkbox is checked, indicating the user is active. The form also includes a 'Save' button and a 'Save & New' button.

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.

The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' page selected. The page is titled 'Sharing Settings' and contains five steps for configuring a sharing rule. Step 1: Rule Name shows 'Label: candidate', 'Rule Name: candidate', and an empty 'Description' field. Step 2: Select your rule type shows 'Based on criteria' selected. Step 3: Select which records to be shared shows a criteria table with 'Candidate Number' equals 'true'. Step 4: Select the users to share with shows 'Roles' and 'Hr Manager'. Step 5: Select the level of access for the users shows 'Read/Write'.

Criteria	Field	Operator	Value	
	Candidate Number	equals	true	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

Additional Options: ☒ Include records owned by users who can't have an assigned role

Share with: Roles | Hr Manager

Access Level: Read/Write

- And save the rule.

Activity 2:

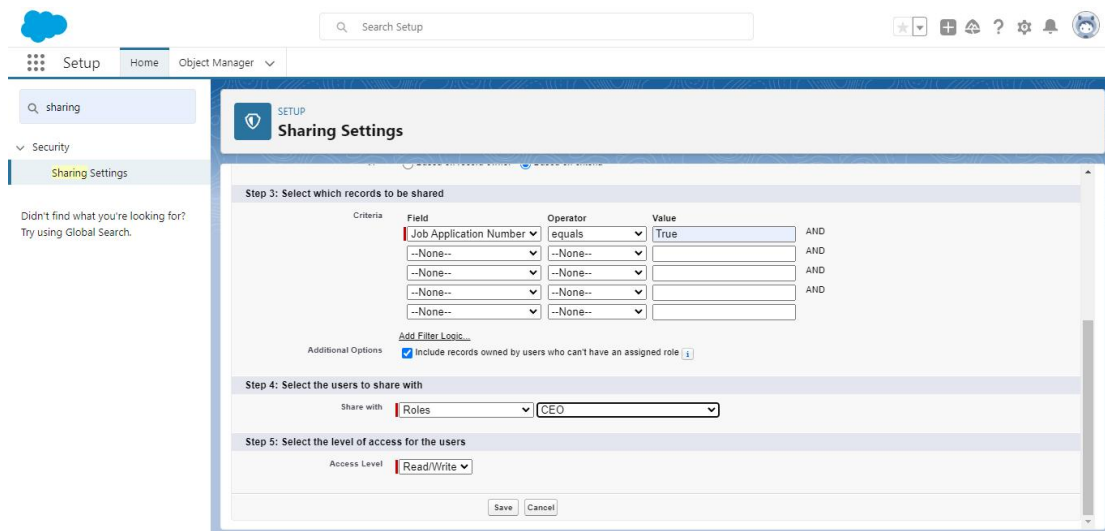
Creating a Sharing Rule to Share the records of Job Application to Hr Manager with the Access of Read/Write. Follow the steps from above Activity.

The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' page selected. The page is titled 'Job Application Sharing Rule'. It contains five steps for configuring a sharing rule. Step 1: Rule Name shows 'Label: Job Application', 'Rule Name: Job_Application', and an empty 'Description' field. Step 2: Select your rule type shows 'Based on criteria' selected. Step 3: Select which records to be shared shows a criteria table with 'Job Application Number' equals 'True'. Step 4: Select the users to share with shows 'Roles' and 'Hr Manager'. Step 5: Select the level of access for the users shows 'Read/Write'.

Criteria	Field	Operator	Value	
	Job Application Number	equals	True	AND
	--None--	--None--		AND
	--None--	--None--		AND

Share with: Roles | Hr Manager

Access Level: Read/Write



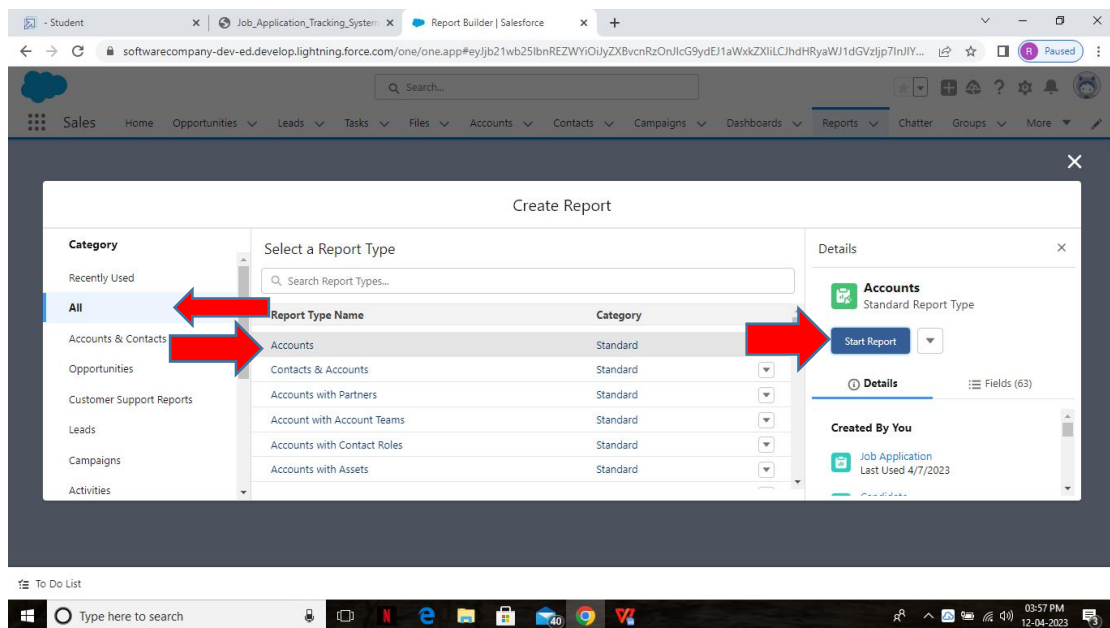
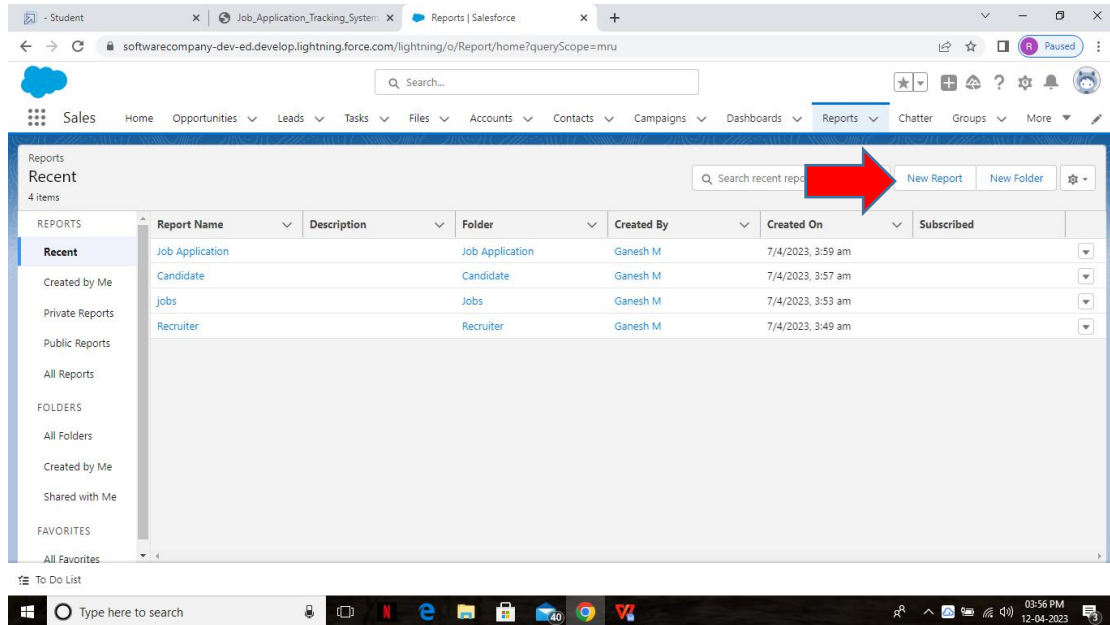
Milestone 8-Reports:

Activity 1:

Create a report:

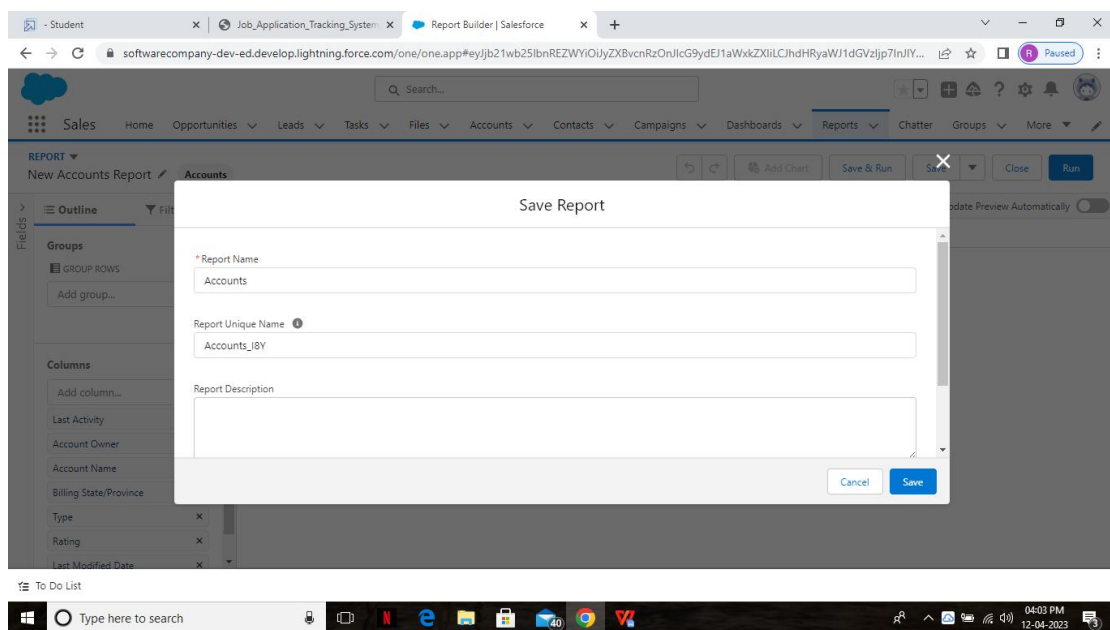
Creating a report that displays rating of the account and which has type and account name.

- 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 All 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:

Student | Job_Application_Tracking_System | jobs | Salesforce

softwarecompany-dev-ed.develop.lightning.force.com/lightning/r/Report/0002w00000E5nnSEAT/view?queryScope=userFolders

Search...

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
<input type="checkbox"/> Burlington Textiles Corp of America	Record Count		0	0	1	0	0	0	0	0	0	0	0	1
<input type="checkbox"/> Dickenson plc	Record Count		0	0	0	0	1	0	0	0	0	0	0	1
<input type="checkbox"/> Edge Communications	Record Count		0	1	0	0	0	0	0	0	0	0	0	1
<input type="checkbox"/> Express Logistics and Transport	Record Count		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

Candidates:

Search...

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
<input type="checkbox"/> Burlington Textiles Corp of America	Record Count		0	0	1	0	0	0	0	0	0	0	0	1
<input type="checkbox"/> Dickenson plc	Record Count		0	0	0	0	1	0	0	0	0	0	0	1
<input type="checkbox"/> Edge Communications	Record Count		0	1	0	0	0	0	0	0	0	0	0	1
<input type="checkbox"/> Express Logistics and Transport	Record Count		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
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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:

Software company - dev-ed.develop.lightning.force.com/lightning/r/Report/0002w00000ESnncEAD/view?queryScope=userFolders

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Report: Accounts Job Application

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
<input type="checkbox"/> Burlington Textiles Corp of America	Record Count		0	0	1	0	0	0	0	0	0	0	0	1
<input type="checkbox"/> Dickenson plc	Record Count		0	0	0	0	1	0	0	0	0	0	0	1
<input type="checkbox"/> Edge Communications	Record Count		0	1	0	0	0	0	0	0	0	0	0	1
<input type="checkbox"/> Express Logistics and Transport	Record Count		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

04:06 PM 12-04-2023

Thank You . . .