

# **SALESFORCE PROJECT**

## **RECRUITING ASSISTANCE FOR THE HR MANAGERS**

### **TEAM MEMEBERS**

**HARIHARAN S**

**AJMAL KHAN A**

**ALEXANDER A**

**AL ABDUL HAKKIM M**

## Salesforce

- Salesforce helps businesses keep track of customer interactions and sales data. It can manage leads, contacts, opportunities, and cases. Salesforce also offers several features to help businesses automate their sales and marketing processes, such as email marketing, lead capture, and lead scoring. CRM systems like Salesforce can help businesses improve their customer service and sales operations.

## CRM Importance

- Customer relationship management is the most effective and efficient way to maintain and develop customer relationships.
- CRM is more than just a business concept; it also envisions strong interpersonal bonds. This kind of bonding drives the business to new heights of success.
- The more sophisticated the strategies used to implement customer relationship management, the stronger and more fruitful the business, it is believed.

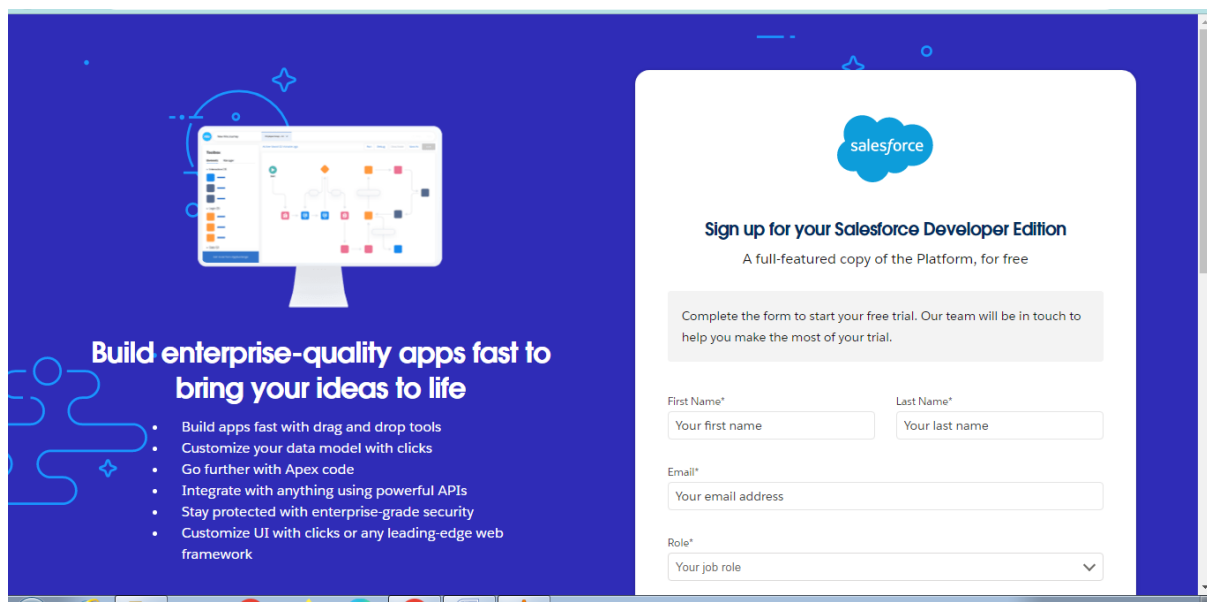


## Project Description

- In this project, we use custom objects, Relationships, page layouts to give the HR team easy access to data they need on an existing app more efficient for the HR team we create custom object and relationships to store and access the data more efficiently. We install an unmanaged package in the org to get metadata that acts as existing data in the recruitment app.

## Procedure for the project

1. Creating Salesforce account using the URL <https://developer.salesforce.com/signup>



2. Installing the package (Trailhead Playground) from trailhead

**Trailhead** Today Learn Credentials Community Help More

Trailhead Playground Management > Install Apps and Packages in Your Trailhead Playground

### Install an App in your Trailhead Playground

Install the Dashboard Pal component, a Salesforce Labs app that allows users to display available dashboards in their org, to get the hang of the installation process. If you already have the Dashboard Pal component installed, then either delete the package or use a new Trailhead Playground for this hands-on challenge.

- Install the Dashboard Pal component in your Trailhead Playground using one of these methods
  - Package ID: **04t3Y0000018TkG**
  - AppExchange link: <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000Ecs3hUAB>

**My Trailhead Playground 1**  
Created on 10/11/2023

**Launch**

**Check Challenge to Earn 500 Points**

Install an App or Package in Your Trailhead Playground

Your Playground Has the Playground Starter App

Your Playground Doesn't Have the Playground Starter App

Install an AppExchange App

See What Was Installed

Resources

**Challenge** **+500 points**

**Get help with this badge**

**Provide feedback for this badge**

### 3. Creating custom object for Job application, Job posting, Job posting site, Review

Object Manager | Salesforce x Lightning Experience | Salesforce x

creative-bear-g3719y-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/home

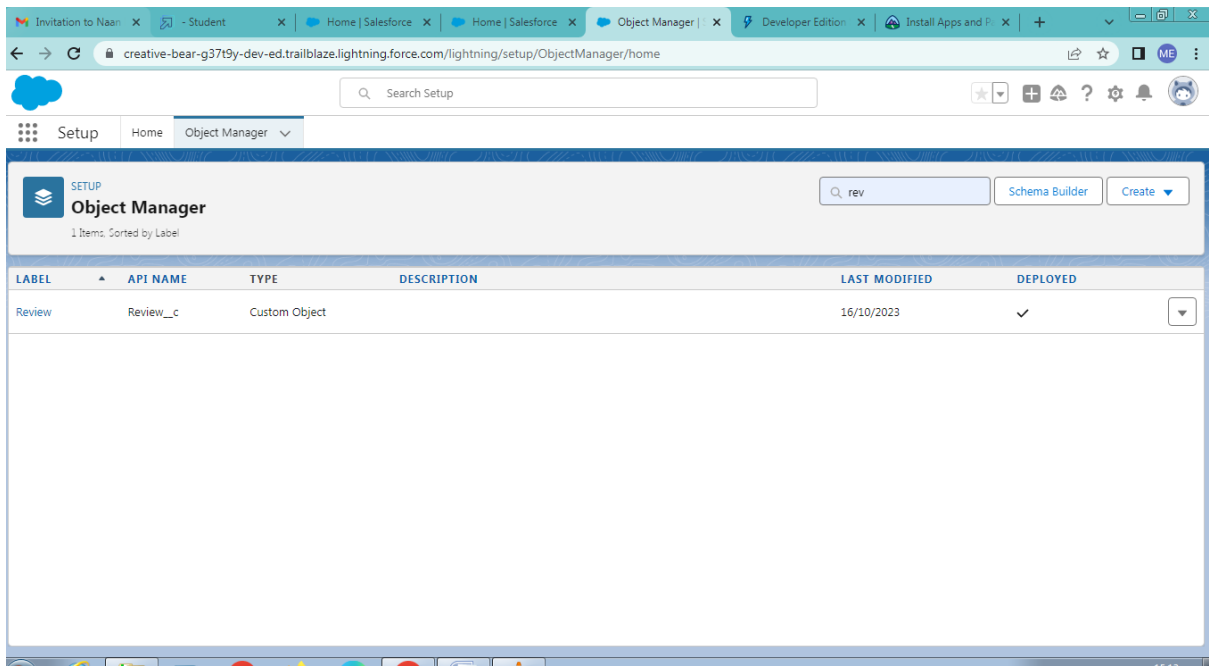
Setup Home Object Manager

**Object Manager**  
3 Items, Sorted by Label

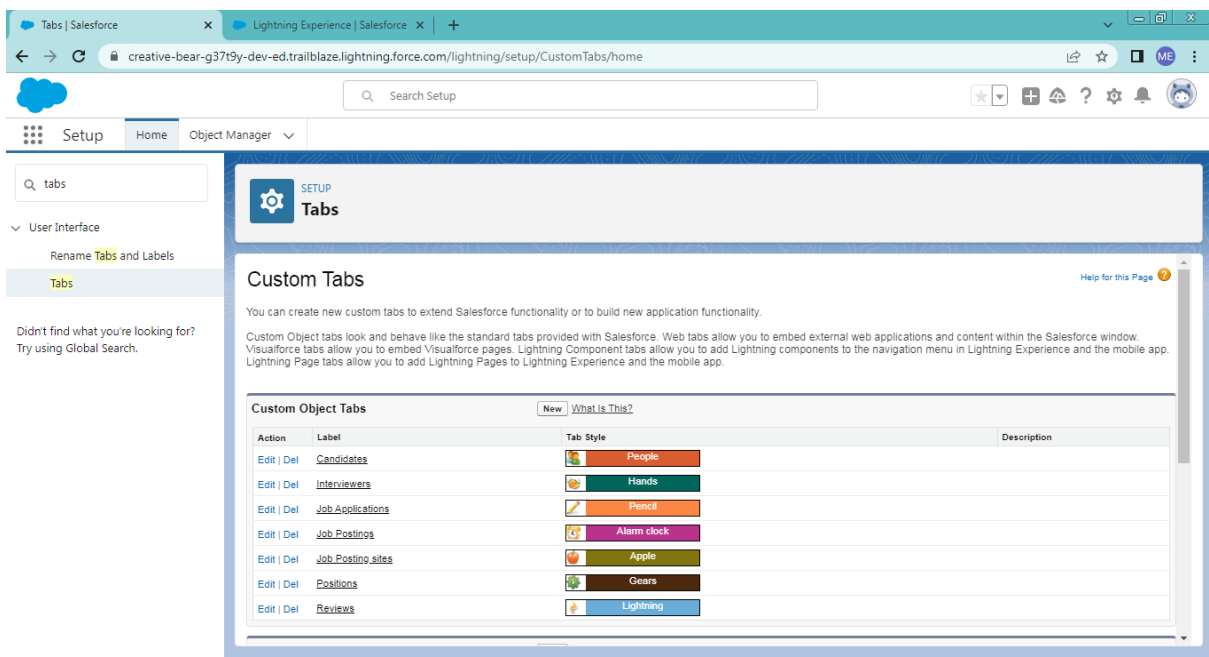
Search Setup

Schema Builder Create

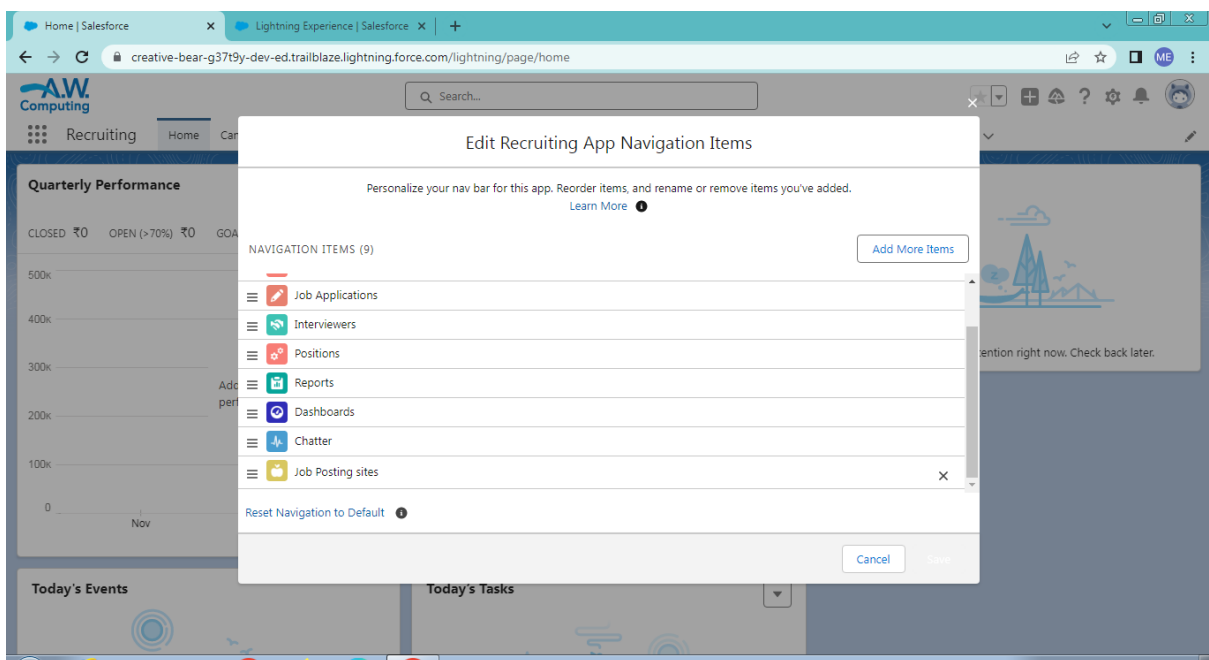
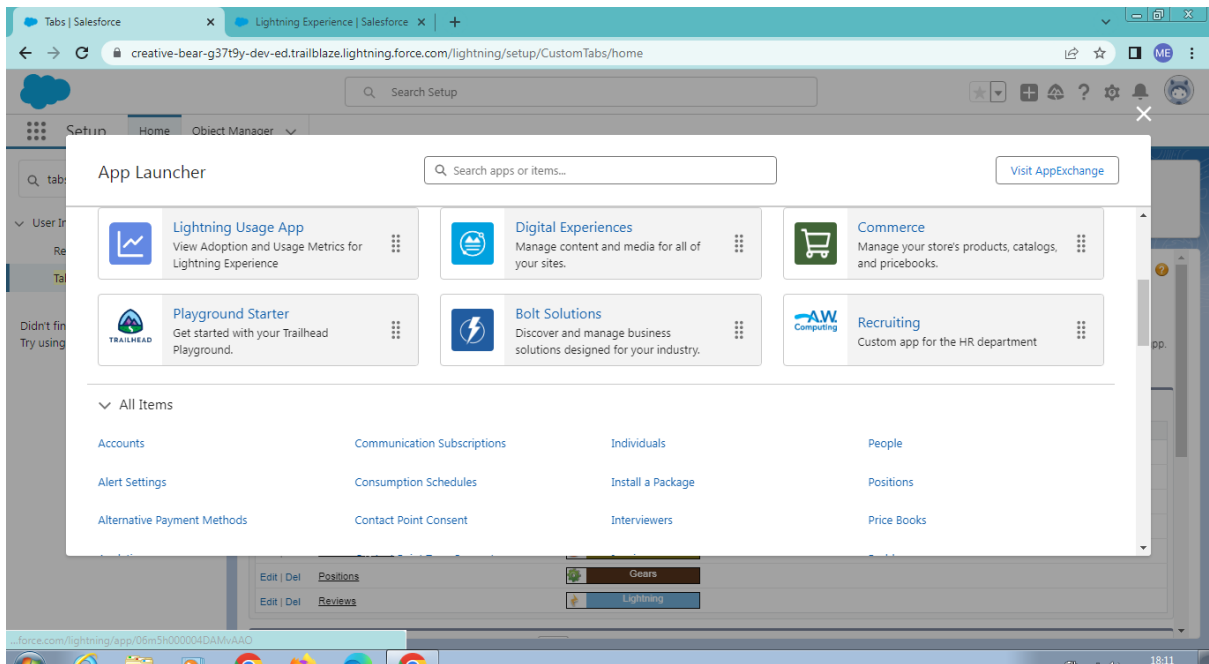
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Job Application	Job_Application__c	Custom Object		16/10/2023	✓
Job Posting	Job_posting__c	Custom Object		16/10/2023	✓
Job Posting site	Job_Posting_site__c	Custom Object		17/10/2023	✓



## 4. Creating tabs



## 5. Adding more items in the Recruiting app



6. Creating the fields and relationship for job posting site, job posting, review

Job Posting site | Salesforce x Lightning Experience | Salesforce x +

creative-bear-g37f9y-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/0115h000002FuOL/FieldsAndRelationships/view

job

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Job Posting site**

Details

**Fields & Relationships**  
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Description	Description__c	Text Area(255)		
Job Posting site Name	Name	Text(80)		✓
Job Posting site URL	Job_Posting_site_URL__c	URL(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Status	Status__c	Picklist		
Technical Site	Technical_Site__c	Checkbox		

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout

Job Posting | Salesforce x Lightning Experience | Salesforce x +

creative-bear-g37f9y-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/0115h000002FuPI/FieldsAndRelationships/view

job

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Job Posting**

Details

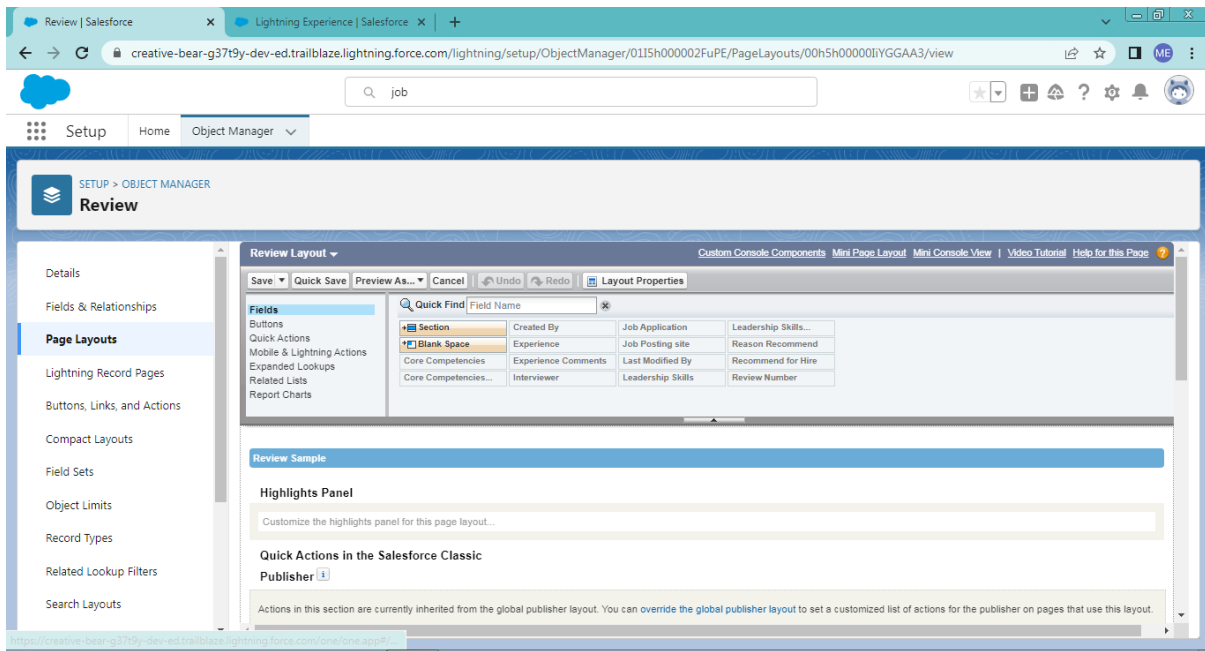
**Fields & Relationships**  
5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

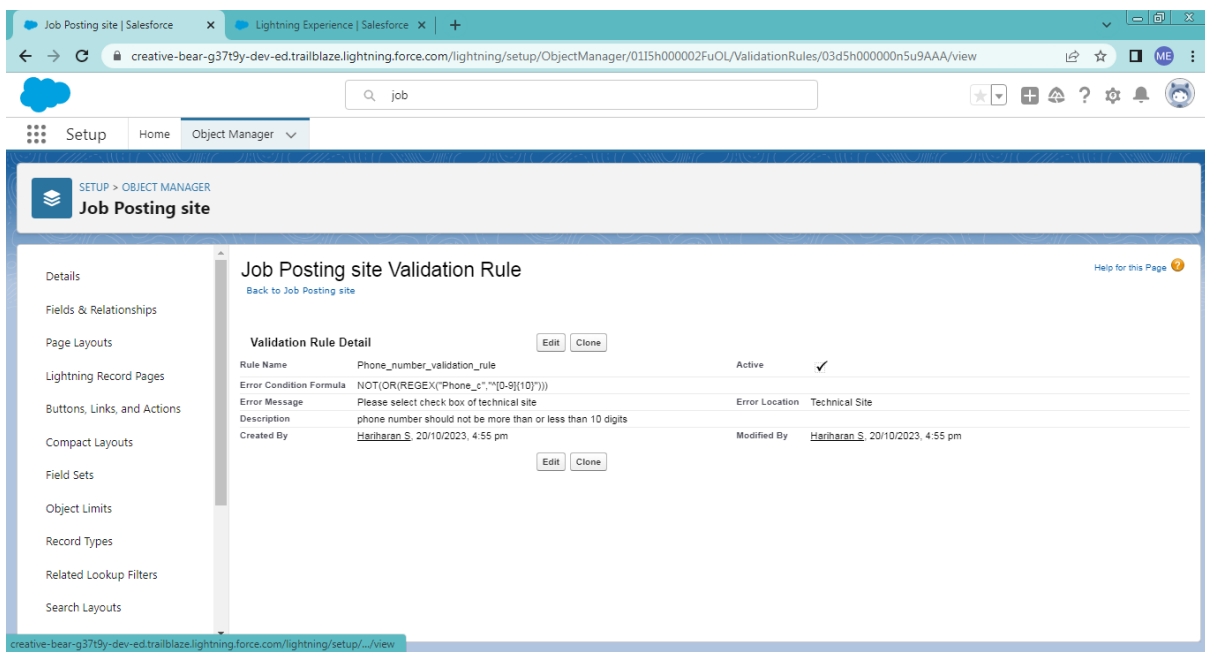
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Job posting number	Name	Auto Number		✓
Job Posting site	Job_Posting_site__c	Master-Detail(Job Posting site)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Position	Position__c	Master-Detail(Position)		✓

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout

## 7. Creating Page layout

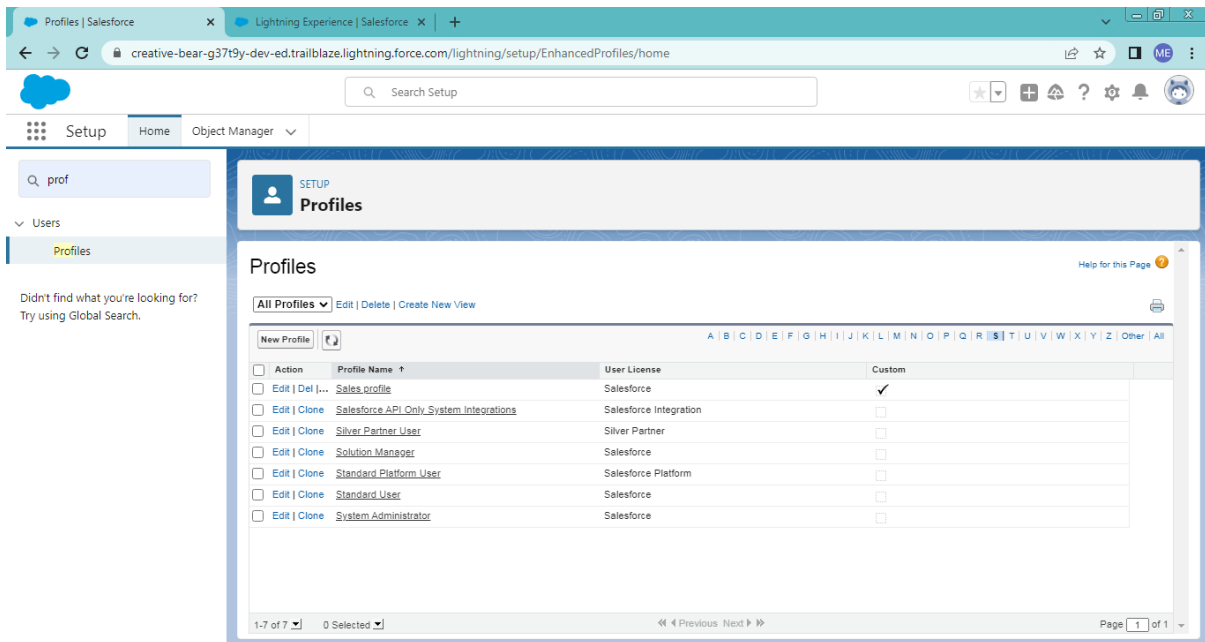


## 8. Creating a Validation rule

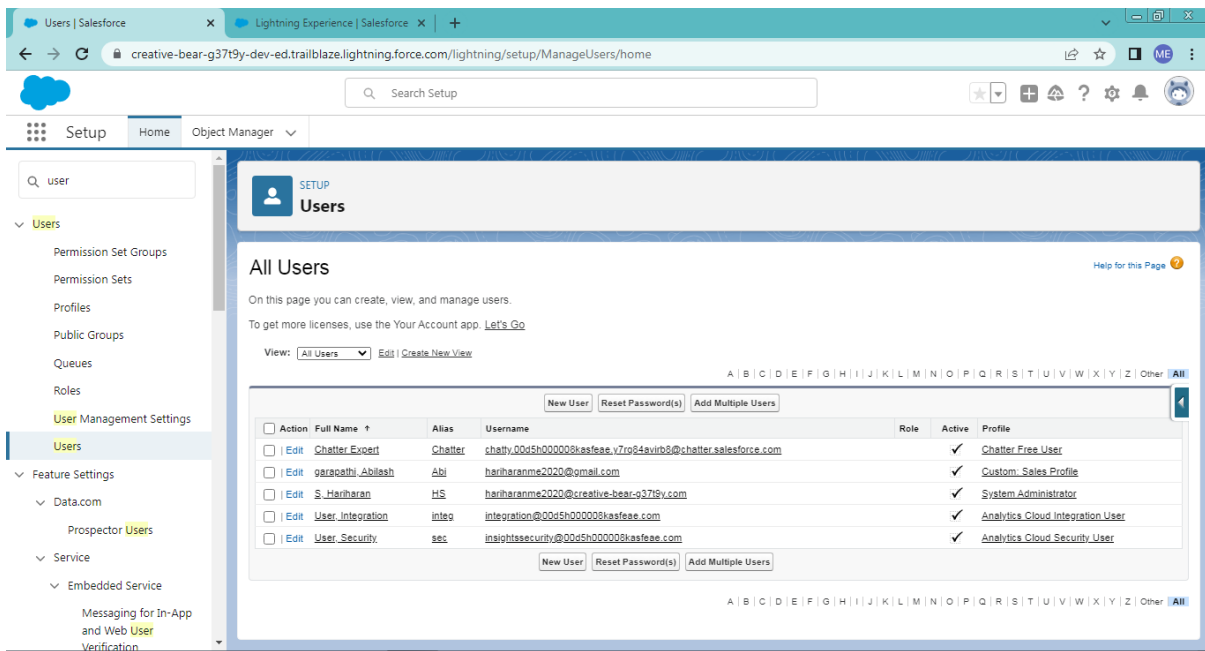


## 9. Creating a Profile as Sales Profile

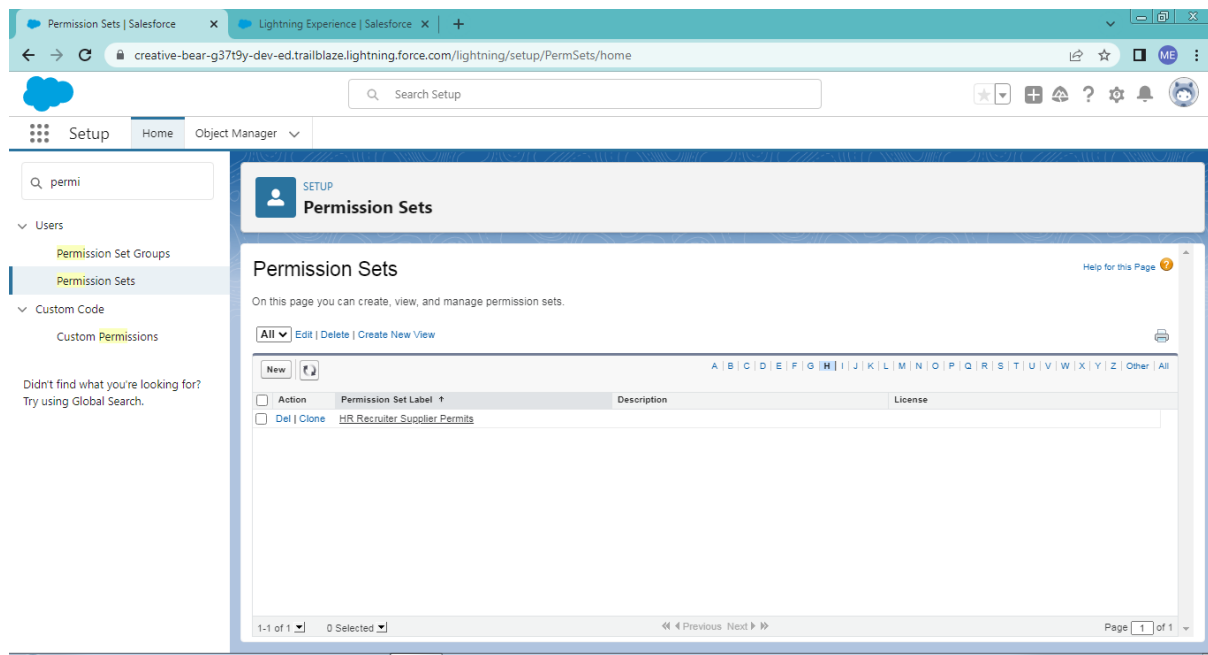




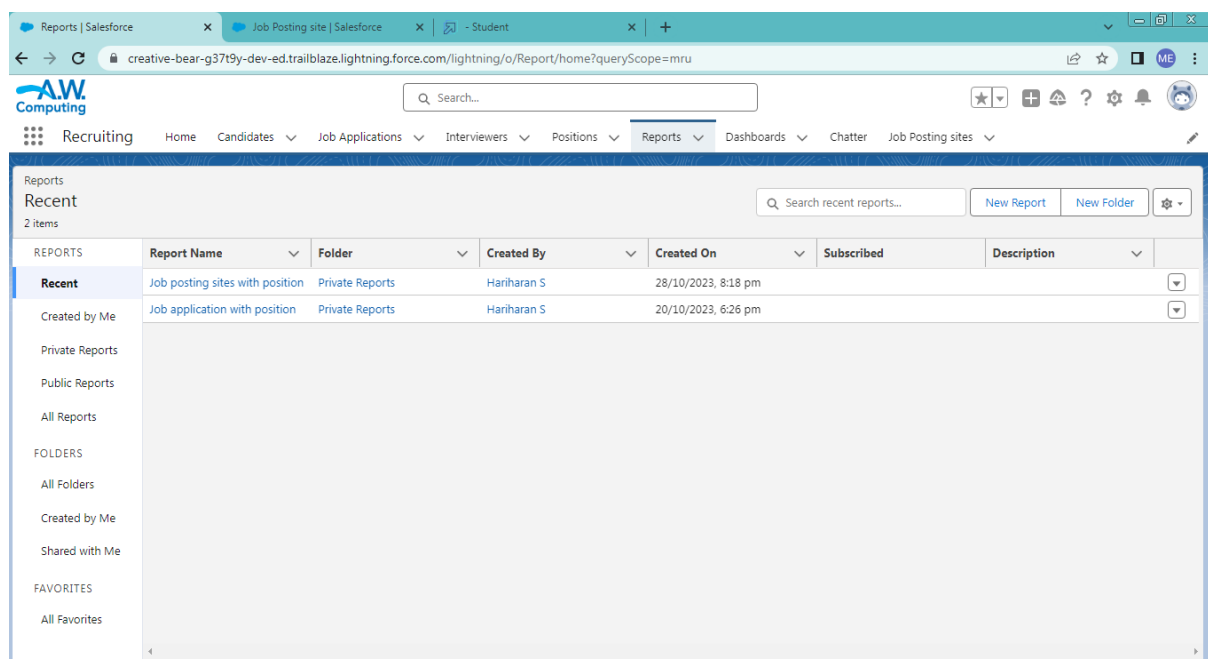
## 10. Creating a user as Abhilash Garpathi



## 11. Creating a Permission set as HR Recruiter Supplier Permits



## 12. Creating report and dashboards



## 13. Apex trigger, DML Operations And Batchable

Developer Console - Google Chrome

creative-bear-g37t9y-dev-ed.trailblaze.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

PriorityTrig.apxt \* x InsertMultipleRec.apxc \* x Util1.apxc \* x

Code Coverage: None API Version: 57 Go To

```
1 trigger PriorityTrig on Review__c (before insert) {
2
3     List<Review__c> myList = trigger.new;
4
5     for(Review__c rv:myList){
6         if(rv.Recommended_For_Hire__c == true){
7             rv.Priority__c = 'high';
8             system.debug(rv);
9         }
10    }
11 }
12
13
14
15
```

Developer Console - Google Chrome

creative-bear-g37t9y-dev-ed.trailblaze.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

PriorityTrig.apxt \* x InsertMultipleRec.apxc \* x Util1.apxc \* x

Code Coverage: None API Version: 57 Go To

```
1 public class InsertMultipleRec {
2     public static void InsertMethod(){
3         List<Job_Posting_Site__c> insRec = new List <Job_Posting_Site__c>();
4         for(integer i =1; i<1000; i++){
5
6
7             Job_Posting_Site__c r = new Job_Posting_Site__c();
8
9             r.Name = 'naukri';
10            r.status__c='Complete';
11            insRec.add(r);
12        }
13        insert insRec;
14        system.debug(insRec);
15    }
16 }
17 }
```

Enter Apex Code

```
1 InsertMultipleRec .InsertMethod();
```

Open Log Execute Execute Highlighted

Developer Console - Google Chrome

creative-bear-g37t9y-dev-ed.trailblaze.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

PriorityTrig.apxt \* InsertMultipleRec.apxc \* **Util1.apxc \***

Code Coverage: None API Version: 57 Go To

```
1 public class Util1 implements Database.Batchable<sObject> {
2
3
4     public Database.QueryLocator start(Database.BatchableContext bc) {
5         string myList = 'SELECT Id, Name, Technical_Site__c FROM Job_Posting_Site__c';
6
7         return Database.getQueryLocator(myList);
8     }
9
10
11     public void execute(Database.BatchableContext bc, List<Job_Posting_Site__c> accList) {
12         system.debug(accList.size());
13         system.debug(accList);
14
15     }
16
17     public void finish(Database.BatchableContext bc) {
18         system.debug('finish method');
19
20     }
```

Enter Apex Code

```
1 Util1 obj = new Util1();
2 Database.executeBatch(obj);
```