

Project Report Template

1 INTRODUCTION

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you

Should start on your learning journey? If you've answered yes to any of these questions, then

You're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of

Productivity-boosting features, that will help you sell smarter and faster. As you work toward

Your badge for this module, we'll take you through these features and answer the question,

"What is Salesforce, anyway?"

1.1 overview

1.2 A brief description about your project

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

Now we are going to prepare job application tracking system

1.3 Purpose

1.4 The use of this project.What can be achieved using this.

The use of this project job tracking system employees.This available also online source.

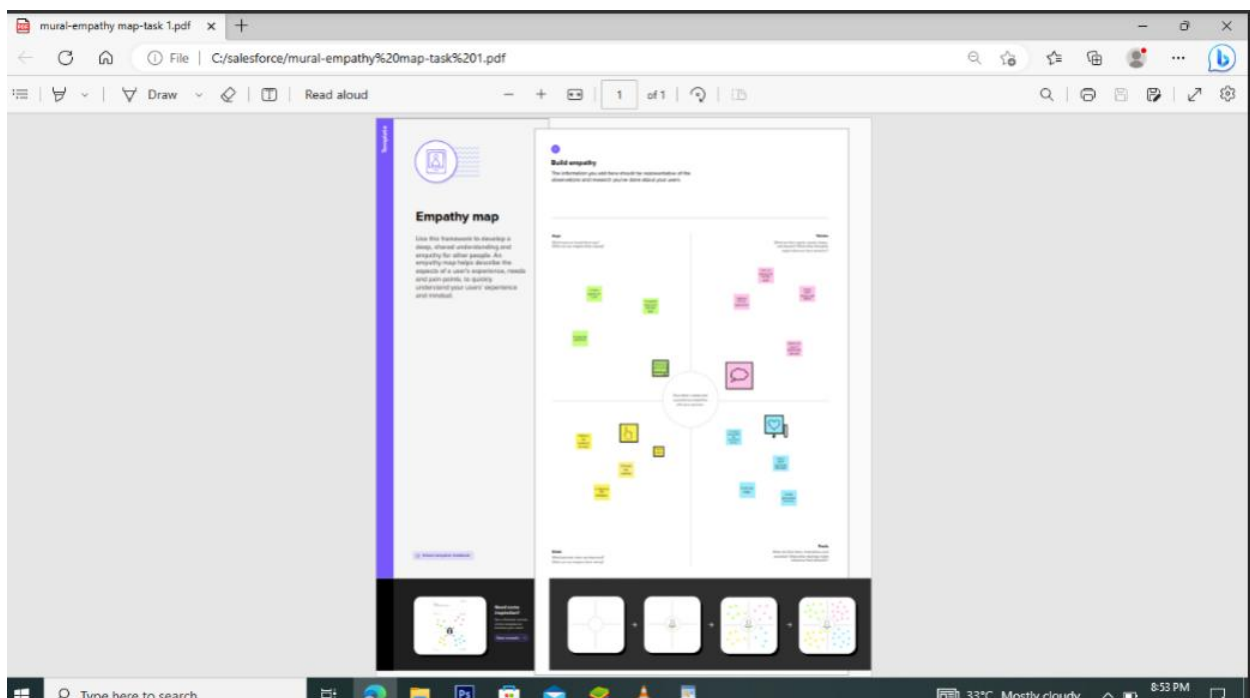


Edit with WPS Office

2 Problem definition & Design Thinking

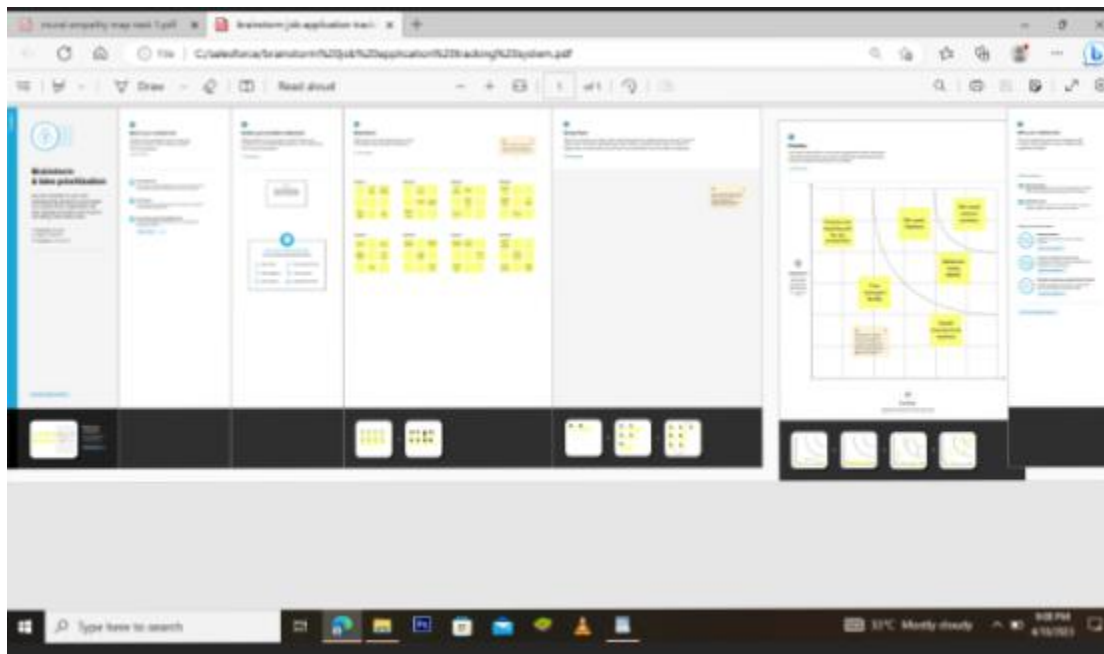
2.1 Empathy Map

Paste the empathy map screenshot



2.2 Ideation & Brainstorming Map

Paste the ideation & brainstorming map screenshot



3.RESULT

3.1 Data Model:

Object name	Field in the Object	Field in the Object
Object 1: New custom object	Field label	Data type
	Recruiter	Auto number
	Recruiter	Auto number
Object2: Recruiter	Field label	Data type
	Job tittle	-

3.2 Activity & screenshot

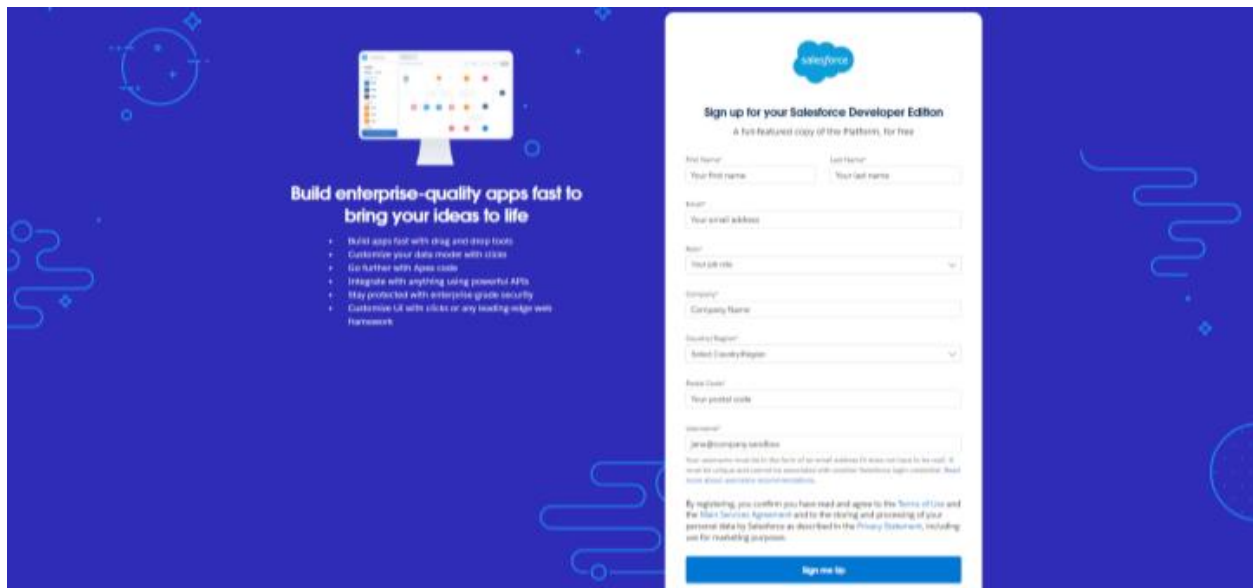
Attach the screenshots of your project activity along with the description.

Activity1:

Creating a Salesforce Developer Org:

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

1. Search [Developer.salesforce.com](https://developer.salesforce.com)



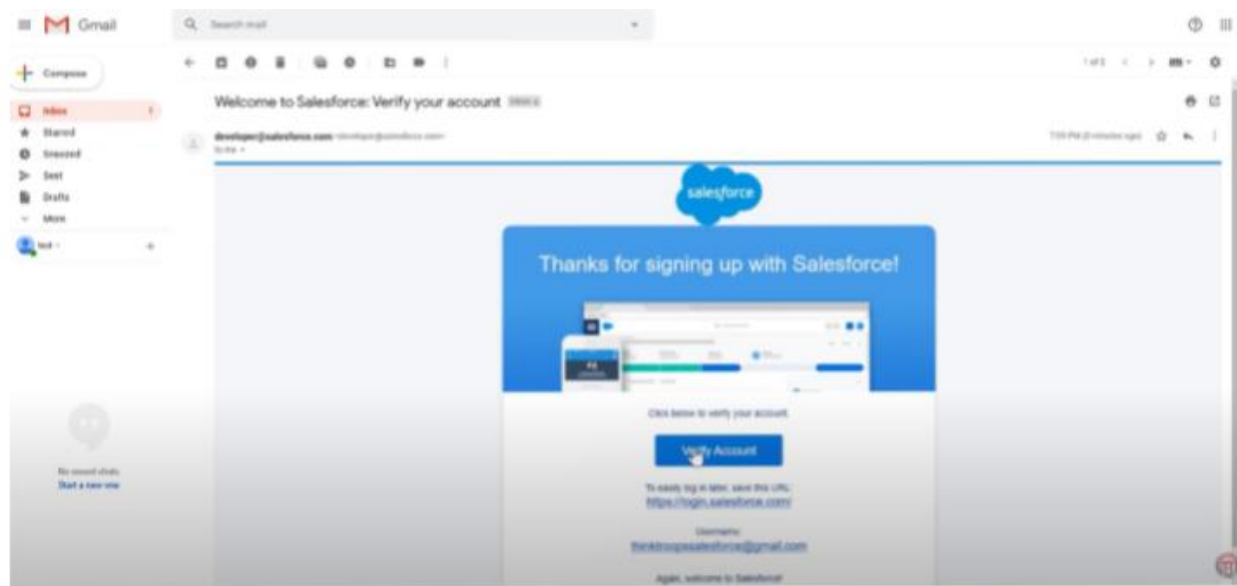
2. Enter the following details like First name, last name, Email, Role, Company, Country/Region,

Postal code, and Username must be unique.

2. Click sign me up, after a few min you will receive a mail from salesforce.org and by using the Verify account link you can create your new password.



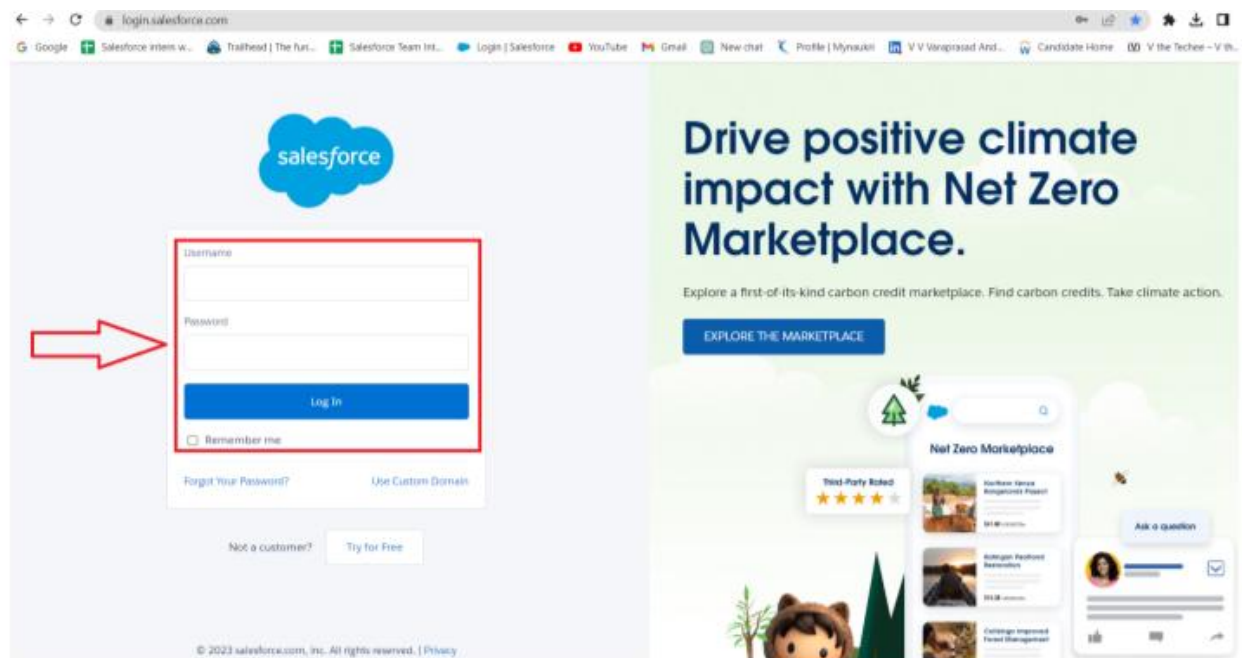
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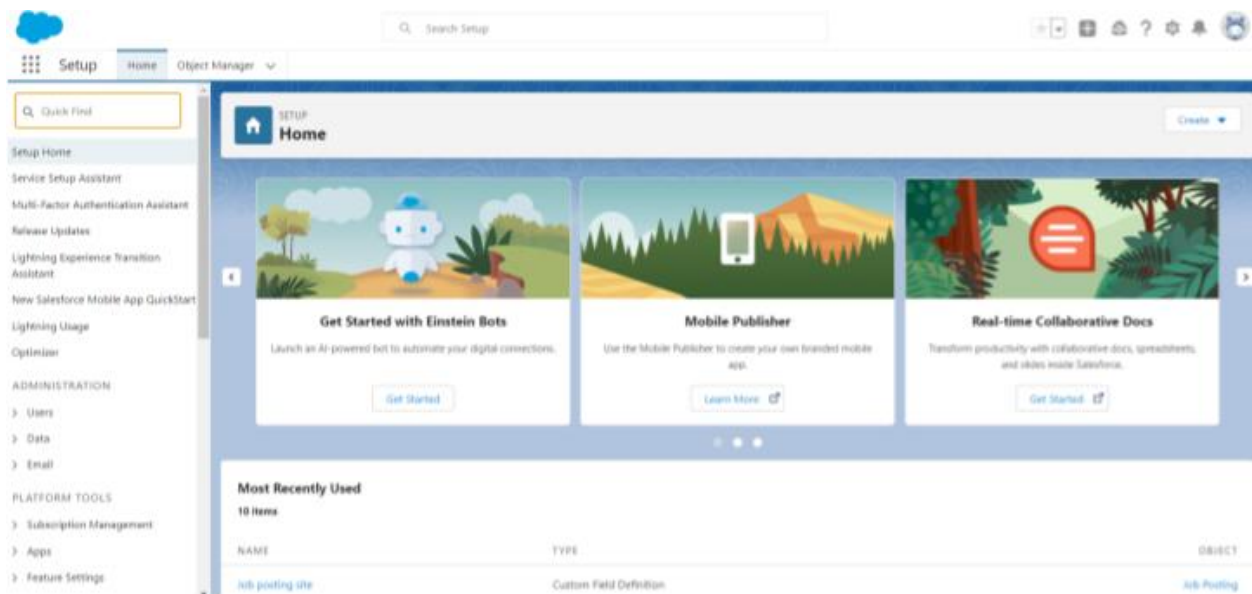
3. Click save.

4. Search login.salesforce.com

5. By using username and password you can into the salesforce org.



The setup page will appear as below.



Milestone 2-Object:

What is an object?

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:

- **Standard Objects:** Standard objects are the kind of objects that are provided by

Salesforce.com such as users, contracts, reports, dashboards, etc.

- **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

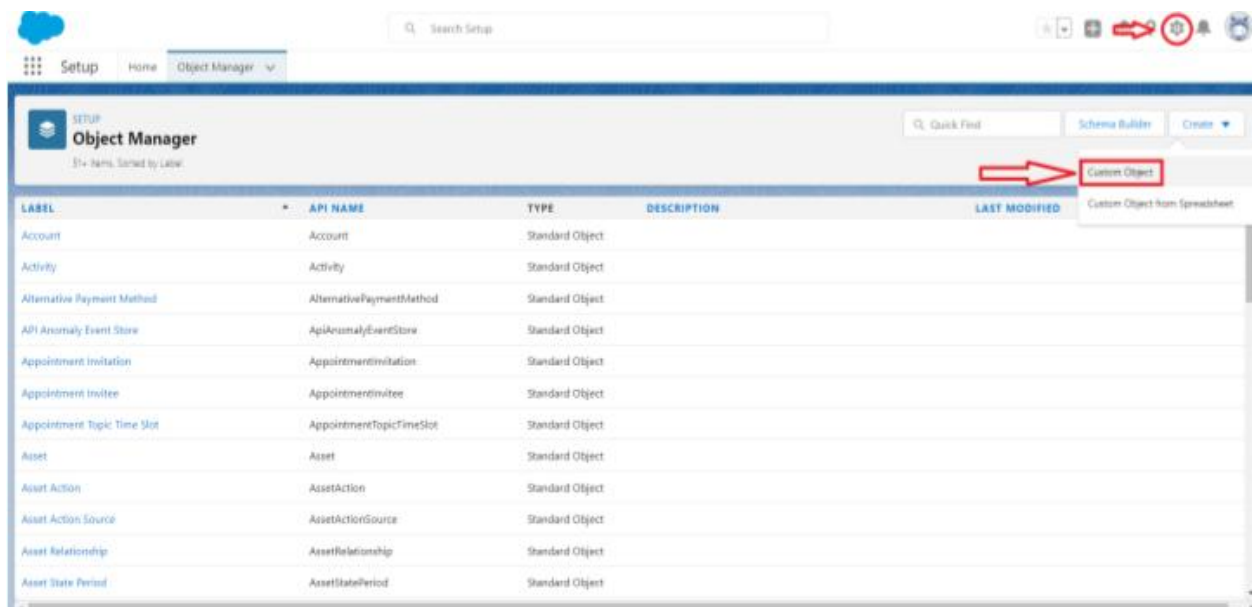
any application and provide a structure for sharing data.

Activity 1:

Create a custom object for Recruiter:

To create a custom object, follow these steps:

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".



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5. Record name: "Recruiter Number"
6. Select the data type as "Auto Number".
7. Under display format enter "REC-{0000}".
8. Enter starting number as 1.
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments
Related list to default page layouts.



SETUP
New Custom Object

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in lists, 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
 Context Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, listviews, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name
 Data Type
 Display Format Example: A (0000) What is This?
 Starting Number

SETUP
New Custom Object

Optional Features

☒ Allow Reports
☐ Allow Activities
☒ Track Field History
☐ Allow in Chatter Groups
☐ Enable Licensing

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

☐ 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

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

Activity 2:

1. Create a Jobs, Candidate, Job Application Object and Tab.

Note :- Follow the steps from the above activity

Milestone 3- Fields:

What are fields?

Fields in Salesforce represents 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 standard

Objects, 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.

Activity 1:

Create the custom fields:

1. Click the object manager tab, Select the object for which you have to create the fields and relationship



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SETUP
Object Manager
183 Items, Sorted by Label

Q Quick Find Schema Builder Create

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			

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

Setup Home Object Manager

SETUP - OBJECT MANAGER
Recruiter

Details

Fields & Relationships
4 Items, Sorted by Field Label

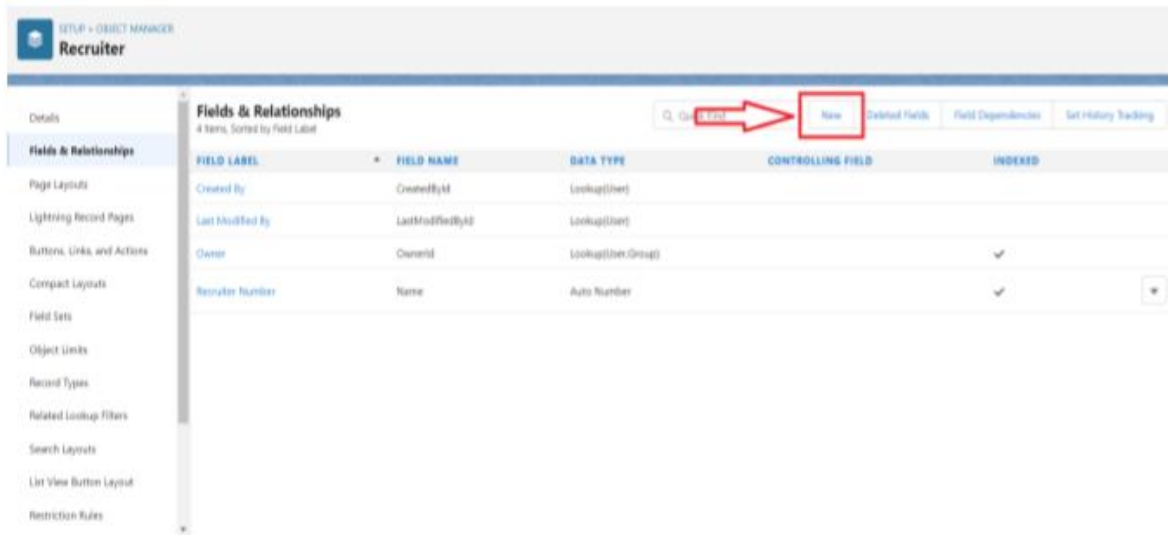
Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Recruiter Number	Name	Auto Number		✓

3.Click New to create a custom field. Tip: Before creating a new field, do a quick search to Make sure a similar one doesn't already exist.

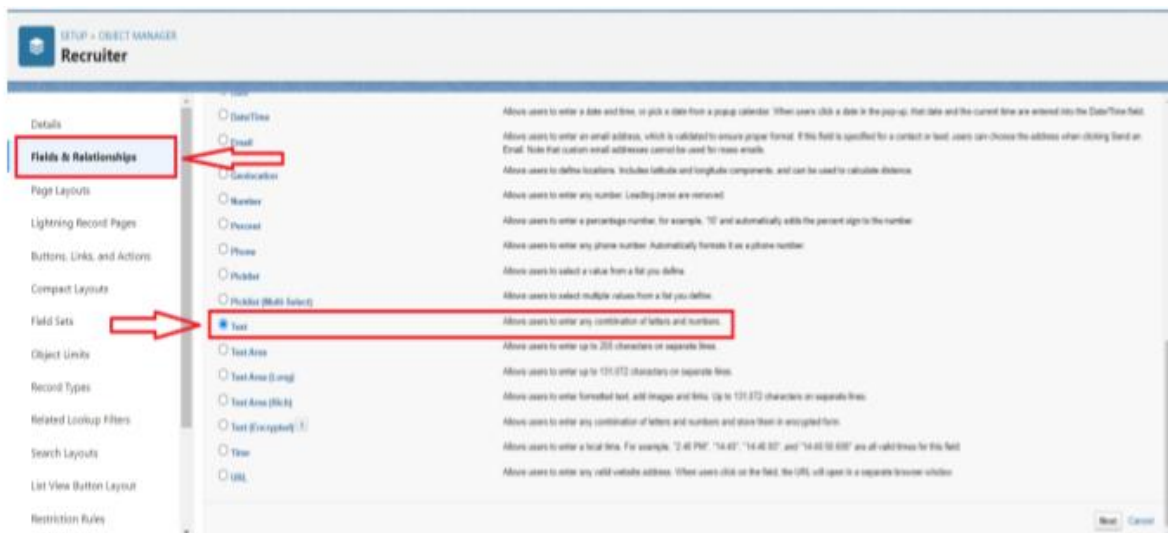


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4. Click on the new to create a field.

5. Choose the data type as a Text, click next



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



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7. 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

8. Select the page layouts that should include this field.

9. Click save.

Activity 2:

Creation of Master-detail relationship:

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



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SETUP • OBJECT MANAGER
Jobs

Details
Fields & Relationships
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
Restriction Rules

Jobs
New Custom Field
Help for this Page

Step 1
Next Cancel

Specify the type of information that the custom field will contain.

Data Type
Select one of the data types below.

- ☐ None Selected
- ☐ Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- ☐ Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- ☐ Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- ☐ Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- ☒ Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create roll-up summary fields on the master record to summarize the detail records.

4. Choose Master-detail Relationship and click Next

5. Choose the related object and select that object.

SETUP • OBJECT MANAGER
Jobs

Details
Fields & Relationships
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
Restriction Rules

Jobs
New Relationship
Help for this Page

Step 2 of 6
Previous Next Cancel

Select the other object to which this object is related.

Related To:

Previous Next Cancel

6. Enter the label and name for the lookup field



Edit with WPS Office

Setup > OBJECT MANAGER
Jobs

Details

Fields & Relationships

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
Restriction Rules
Scoping Rules
Triggers

New Relationship

Step 2: Enter the label and name for the lookup field

Step 2 of 6

Field Label: Recruiter

Field Name: Recruiter

Description:

Help Text:

Child Relationship Name: Jobs

Sharing Setting: ☒ Read/Write. Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: ☒ Child records can be reparented to other parent records after they are created.

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity.

Lookup Filter

7. Click Next, Next, and Save

Activity 3:

Create a new custom field:

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

Setup > OBJECT MANAGER
Jobs

Details

Fields & Relationships

4 Items, Sorted by Field Label

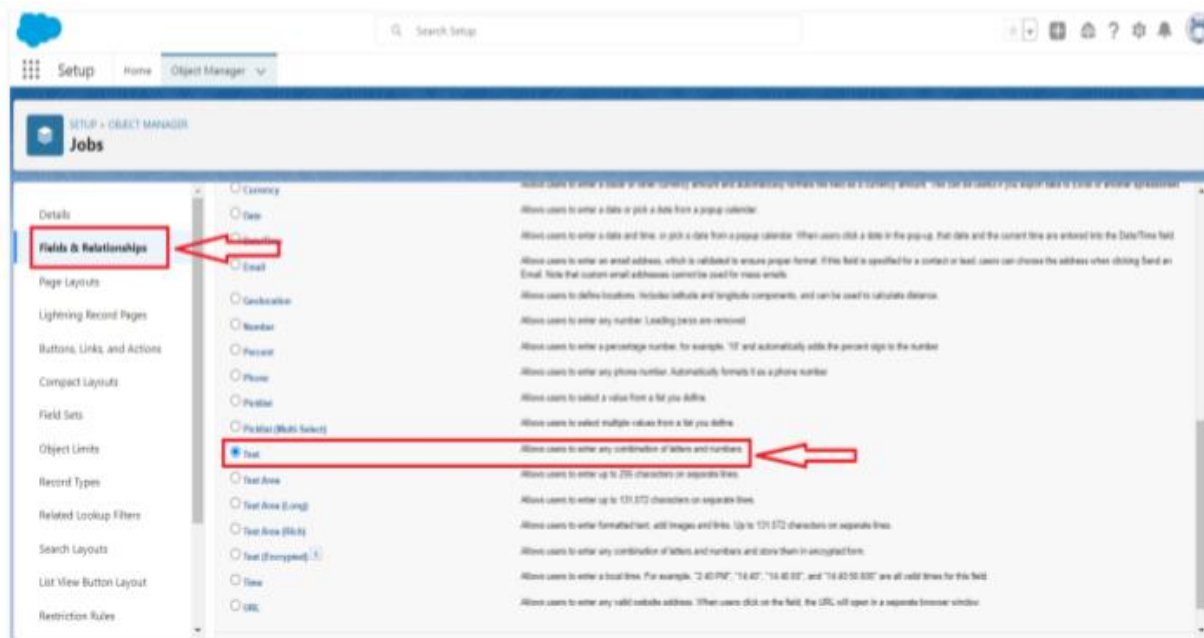
Q, Quick Find **New** Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Job Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓

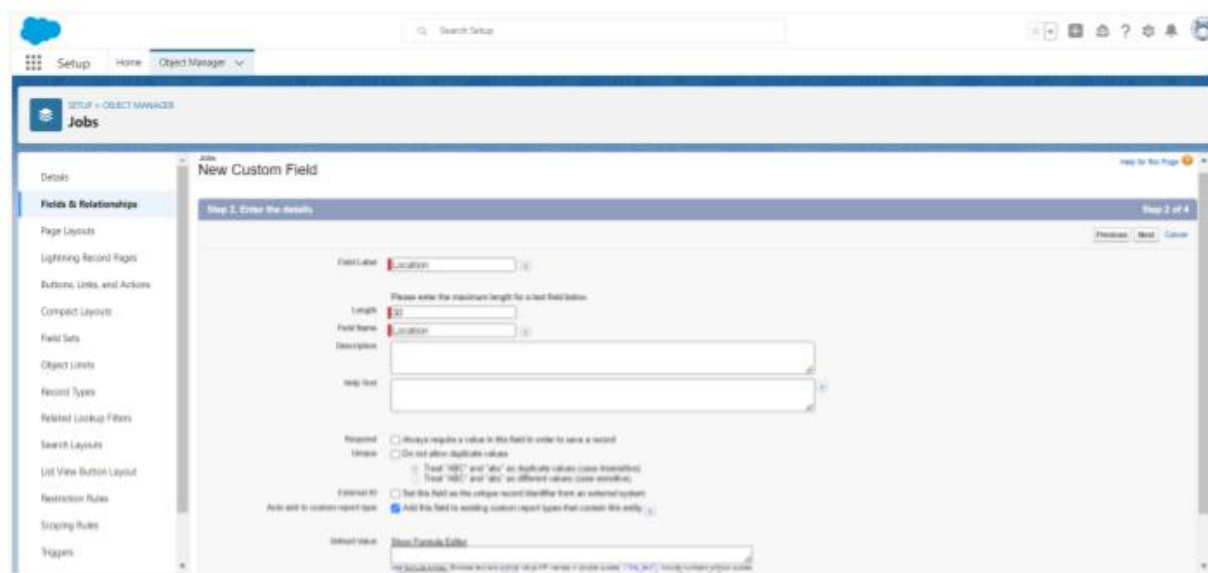
4. Choose the data type Text Area click next



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5. Enter the Field Label and field name click next



6. Click next and save.

Milestone 4-Tab:



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What is Tab?

In Salesforce, a tab is a user interface element that allows users to navigate to different sections

Of the platform, such as Accounts, Contacts, Leads, and Opportunities. Tabs can also be used to

Access custom objects and custom pages. They are typically located at the top of the screen and

Can be customized to fit the needs of the organization.

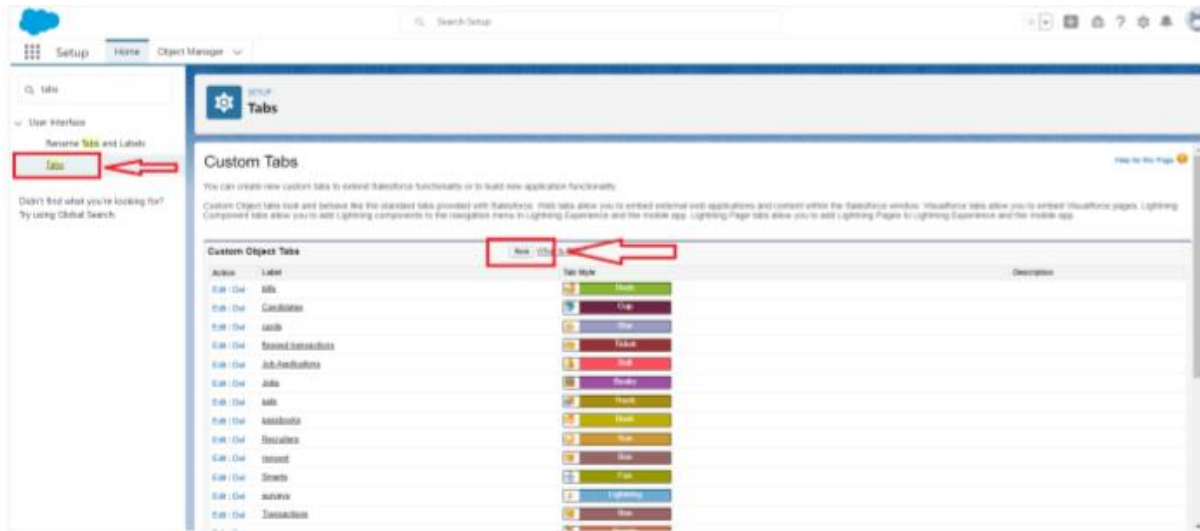
Activity 1 :

Create a tab :

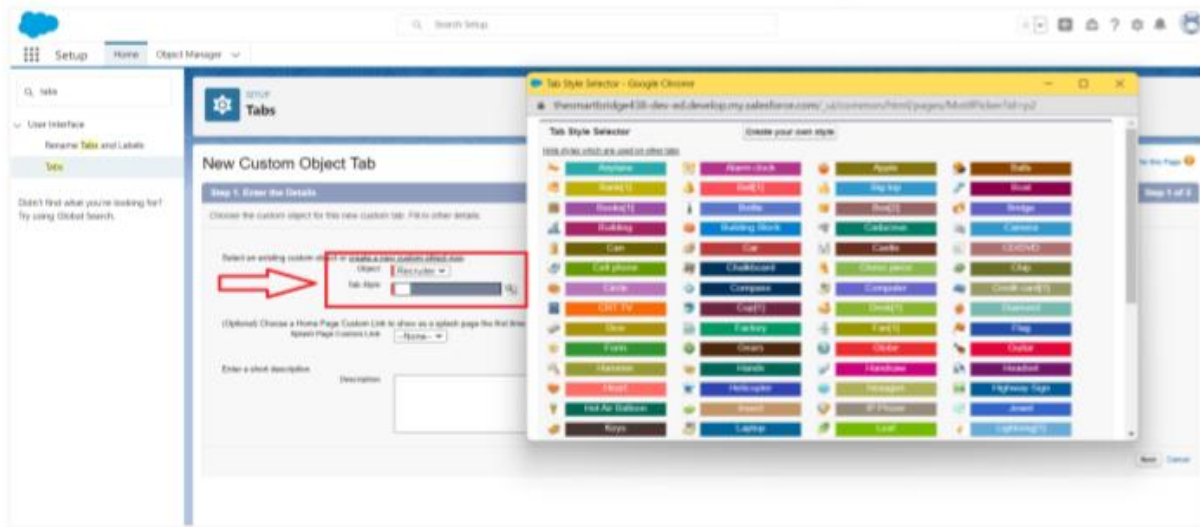
1. Click setup
2. Search tab in Quick box then, select tab
3. Click New custom object tab section



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4. Select the created object Recruiter and tab style for the new custom tab.



5. Select the profiles that visible in the tab

6. Click on custom apps to make visible.



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7. Click save.

Milestone 5- Profile:

What is a 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.

Activity 1:

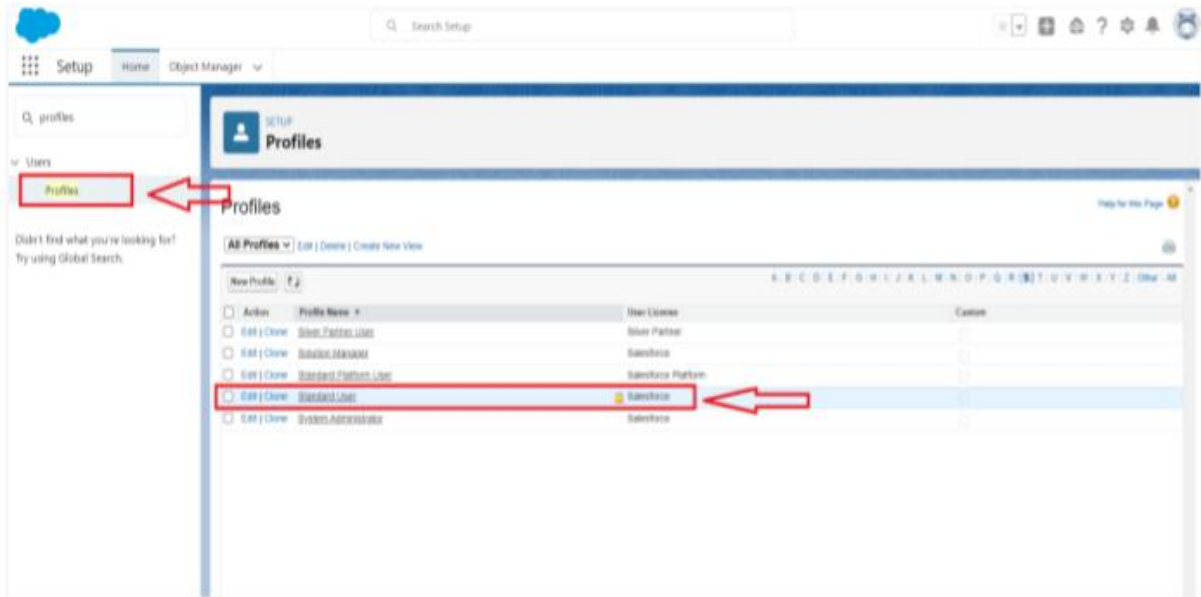
Create a custom profile :

1. From setup , enter profiles in Quick Find box
2. Select profiles.



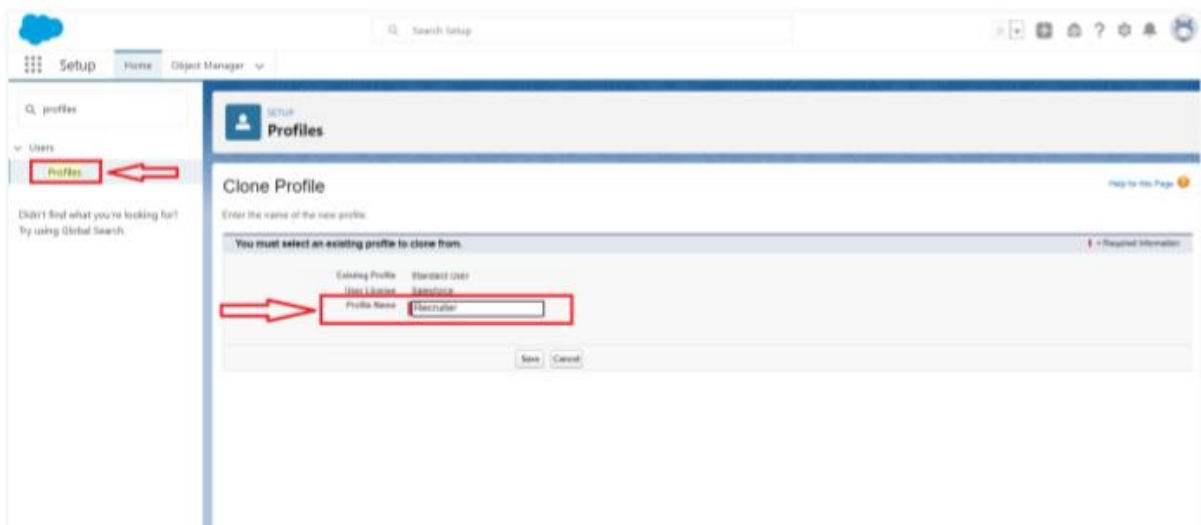
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3. Click clone.



4. For Profile, enter Recruiter.

5. Click save.



Activity 2:

Create a profile with the profile name as “Sales Manager”.

Follow the steps from above Activity

Milestone 6-User

What is a 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.

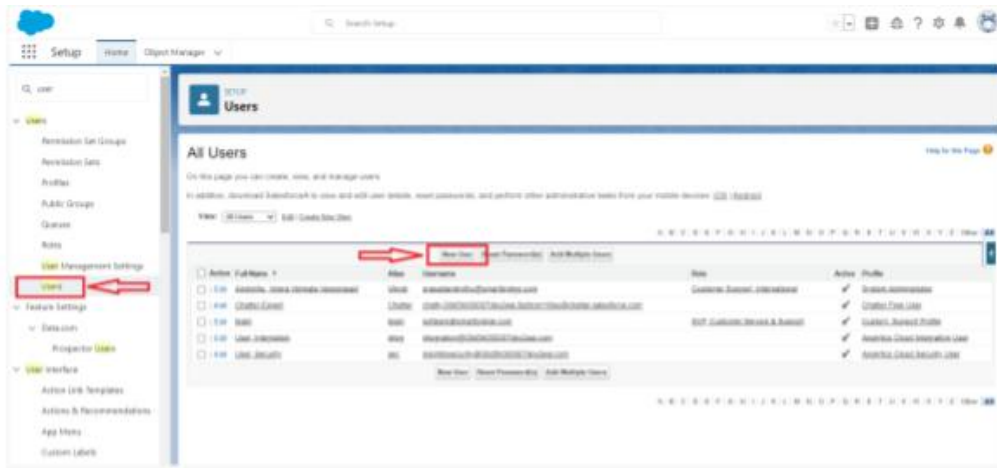
Activity 1:

To Create a user:

1. From Setup, enter Users in the Quick Find box, then select Users.
2. Click New User.



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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.

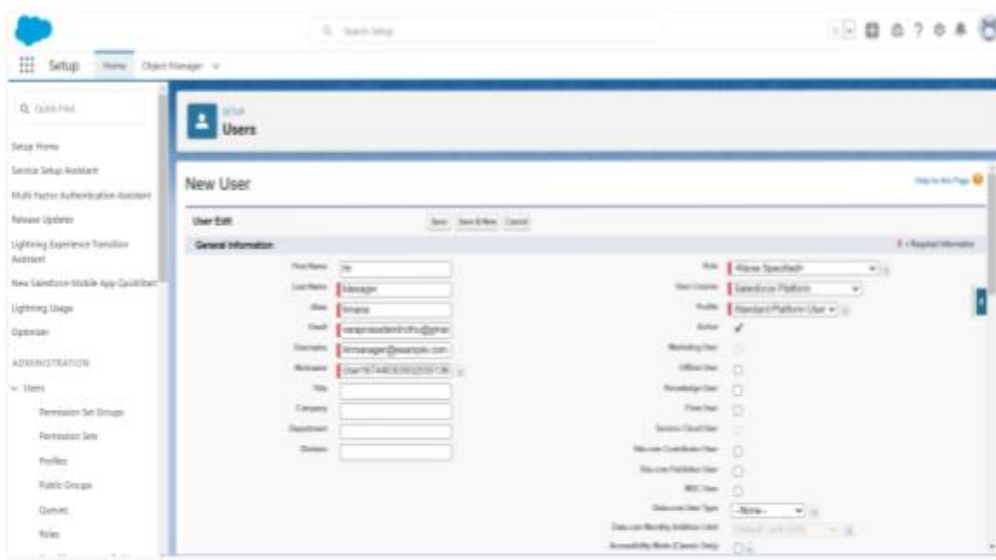
5. Then create a new role Hr Manager.

6. Select user License as Standard Platform User.

7. Select profile.



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8. Click save

Activity 2:

Create 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

What are 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,

- Owner-based Sharing Rules
- Criteria-based Sharing Rules

Activity 1:

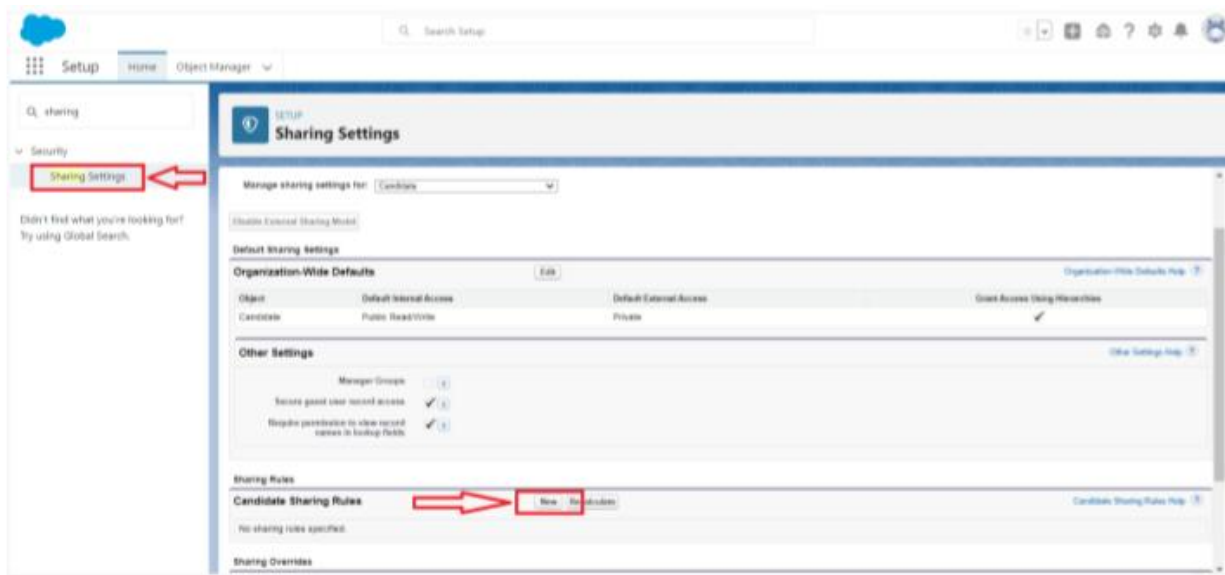
Create a sharing rule

- 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.



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- 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 operator as equal and value is true.
- 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.



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Setup

Sharing Settings

Step 1: Rule Name

Label: candidate

Rule Name: candidate

Description:

Step 2: Select your rule type

Rule Type: ☒ Based on record owner ☐ Based on criteria

Step 3: Select which records to be shared

Criteria	Field	Operator	Value	
1	Candidate Number	equals	True	AND
2	-None-	-None-	-None-	AND
3	-None-	-None-	-None-	AND
4	-None-	-None-	-None-	AND
5	-None-	-None-	-None-	AND

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

Step 4: Select the users to share with

Share with: Hr Manager

Step 5: Select the level of access for the users

Access Level: Read/Write

9) And save the rule.

Activity 2:

Create 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:

What are Reports?

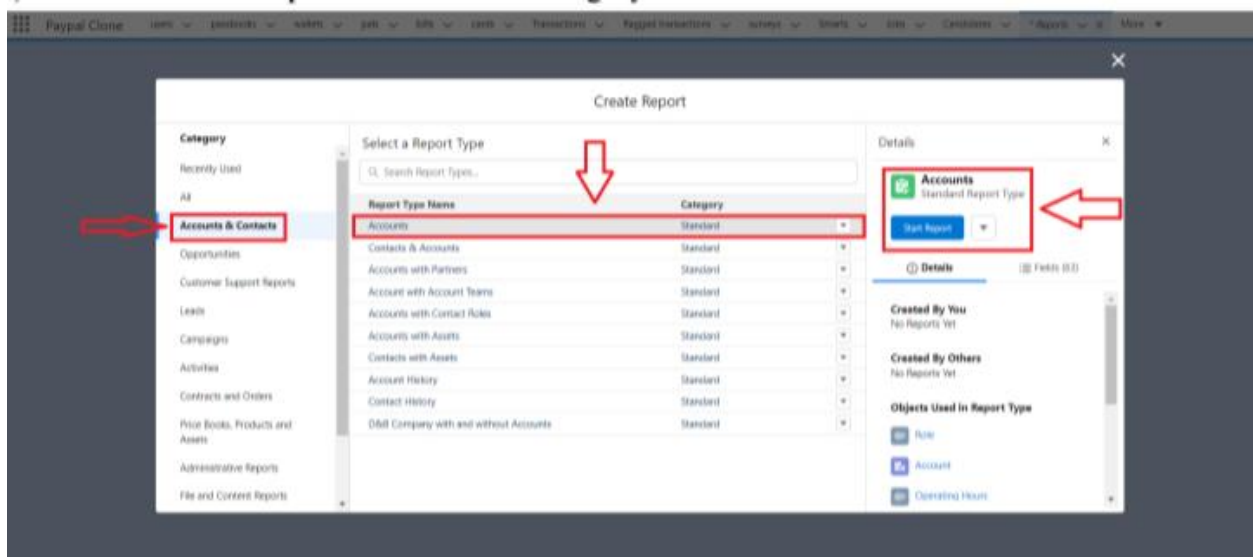
A report is a list of records that meet the criteria you define. It's displayed in rows and Columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored In a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity 1:

Create a report:

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

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



- 3) And the report type has accounts.



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- 4) In the details section select the option start report.
- 5) In the filter pane select All accounts to show me.
- 6) And All time is created.
- 7) In the outline pane, group rows select Rating and in group columns select Account Name.
- 8) In the columns section add Type and Billing city.

The screenshot shows the 'New Accounts Report' interface. The top navigation bar includes 'Paypal Clone' and various menu items. The left sidebar has an 'Outline' section with 'Groups' and 'Columns' sub-sections. The 'Groups' section shows 'Rating' selected. The 'Columns' section shows 'Type' and 'Billing City' selected. The main data table displays a grid of account information with columns for 'Rating', 'Billing City', and various account details. The 'Details' section at the bottom shows a list of account details with columns for 'Last Activity', 'Account Owner', 'Account Name', 'Billing Status/Phone', and 'Last Modified Date'.

- 9) Save the report by giving label name and save the folder as a public folder and save the report.

Activity 2:

Create a Report using the Objects Jobs, Candidate and Job Application.

Follow the steps from above Activity.

4. Trailhead Profile Public URL

Team Lead-<https://trailblazer.me/id/ddhanush18>

Team Member 1-<https://trailblazer.me/id/djoseph77>

Team Member 2-<https://trailblazer.me/id/irajesh8>

Team Member3-<https://trailblazer.me/id/ilakkiya005>

5.ADVANTAGES & DISADVANTAGE

List of advantages and disadvantages of the proposed solution

- 1.Provides with first hand job-related information
- 2.Helps in creating right job-empolyee fit
- 3.Helps in establishing effective hinning strategies
- 4.A Disadvantages of ATS is missing qualified applicants due to wrong keyword selection



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6.APPLICATION

Managing the Candidates

1)Application tracking software is a tool for managing the candidates resume evaluation and hiring process from starts to finish

Handless the Recruitment process

*Application tracking software handless the recruitment process just by shorting through thousand of application to determine which ones are the best the for application

7.CONCLUSION

*Applicant Tracking system for recurties is a very effective hiring solution the successful recurties utilize Because without it there is a good chance that your process of moving applications through different stages can become very difficult

8.FUTURESCOPE

*Enhancements that can be made in future.

