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.

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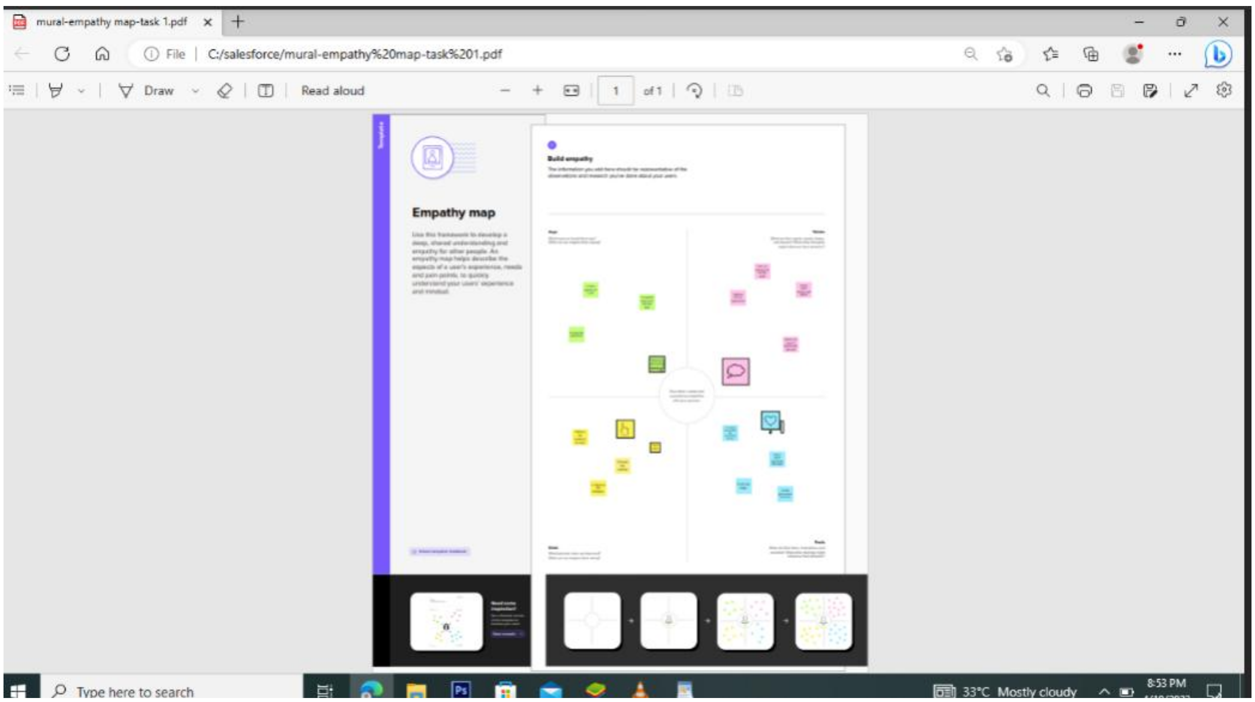
2 Problem definition & Design Thinking

2.1 Empathy Map

Paste the empathy map screenshot



2.2 Ideation & Brainstorming Map

2.3 Paste the ideation & brainstorming map screenshot

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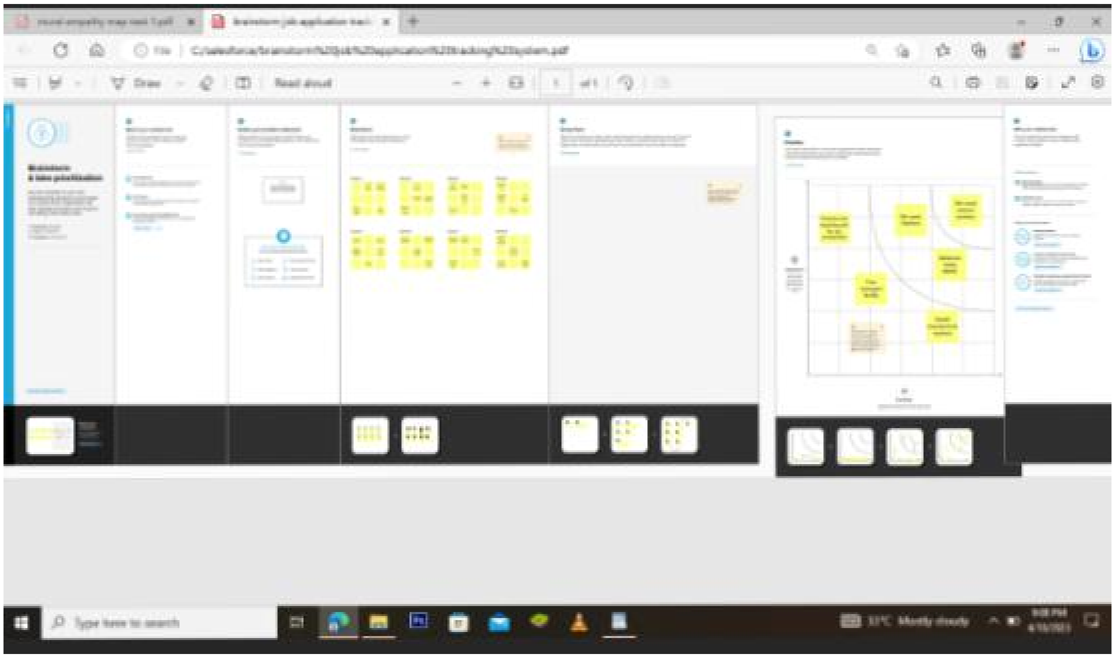

3.RESULT

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

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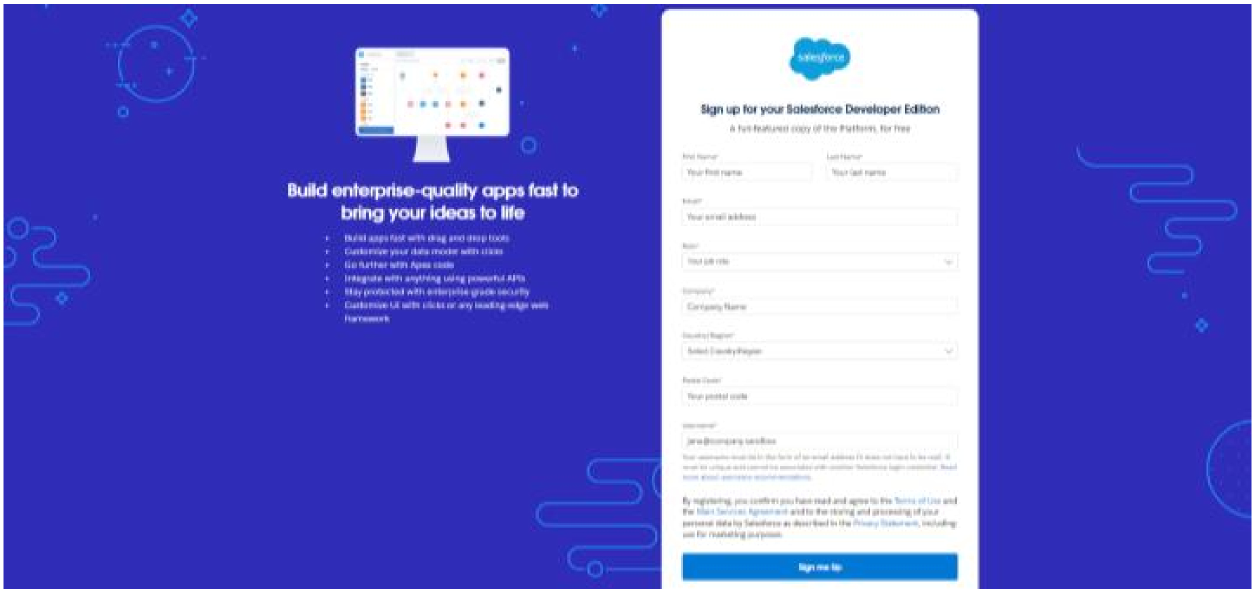

2.Enter the following details like First name, last name, Email, Role, Company, Country/Region,

Postal code, and Username must be unique.

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

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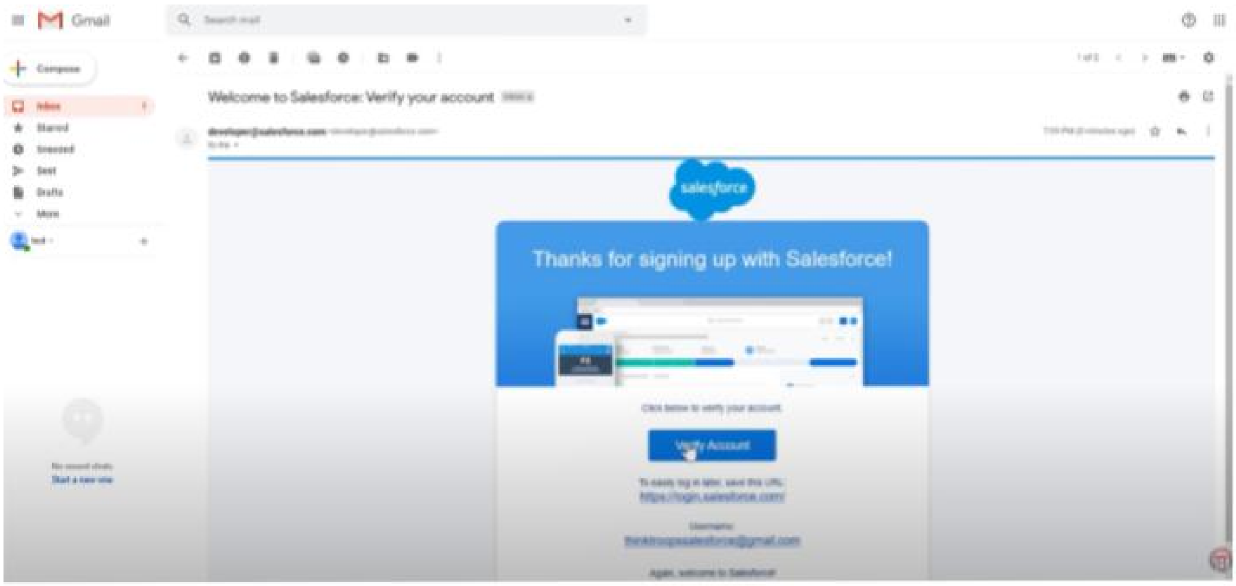
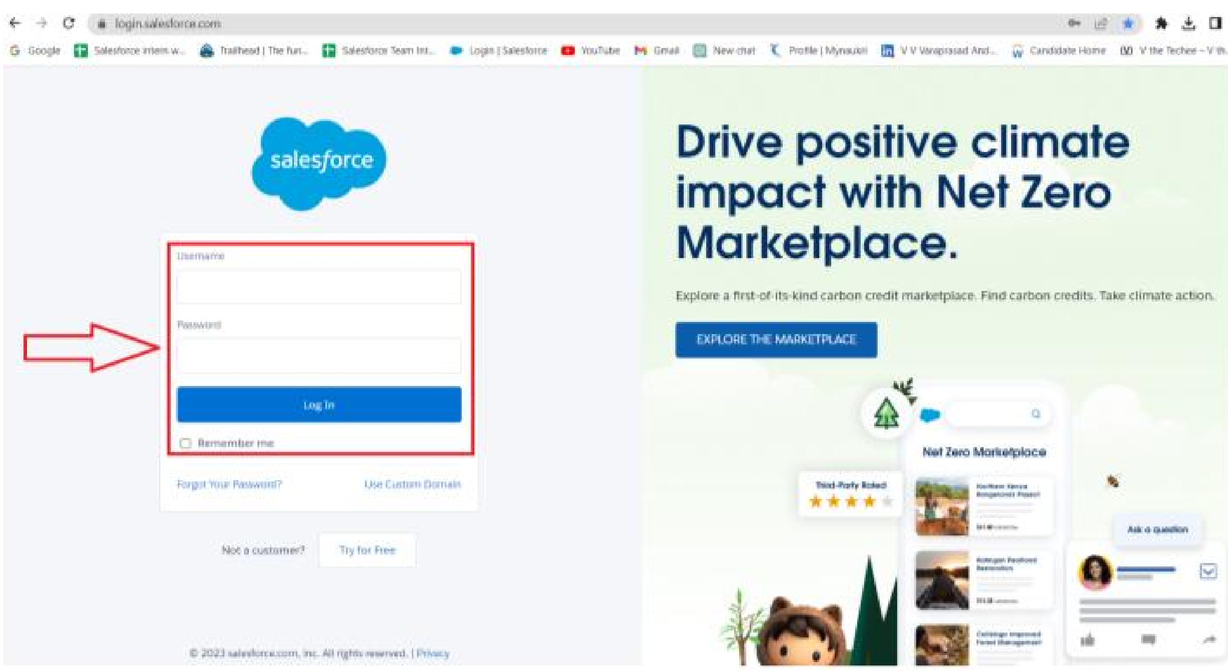


3.Click save.

4.Search login.salesforce.com

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



The setup page will appear as below.

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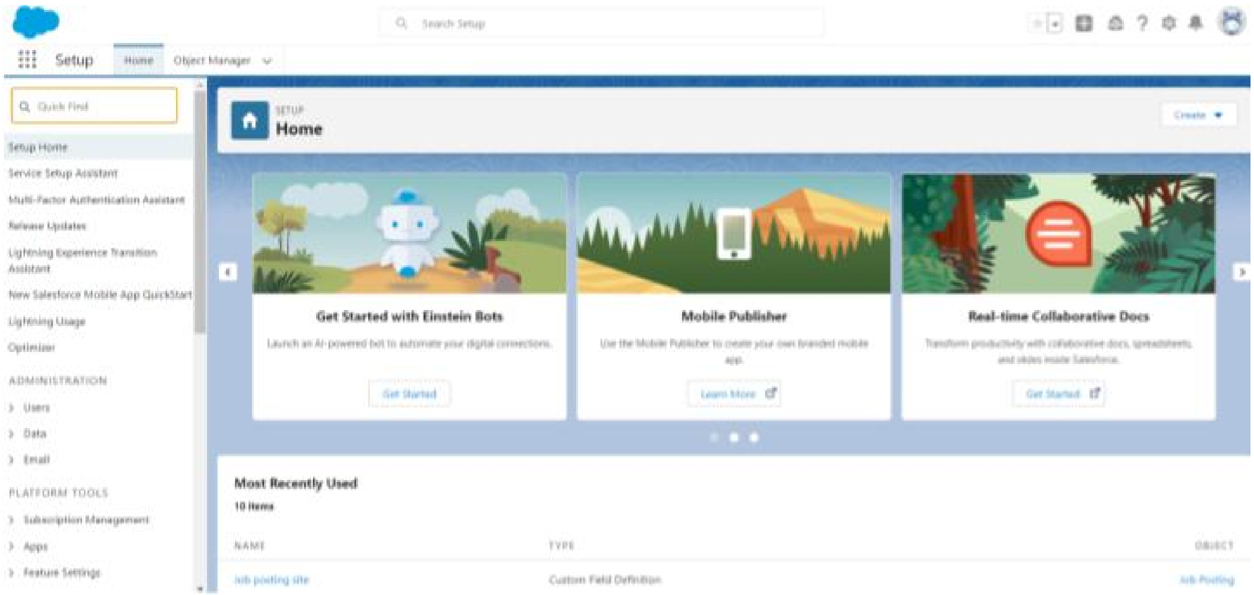

Milestone 2-Object:

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

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anyapplication and provide a structure for sharing data.

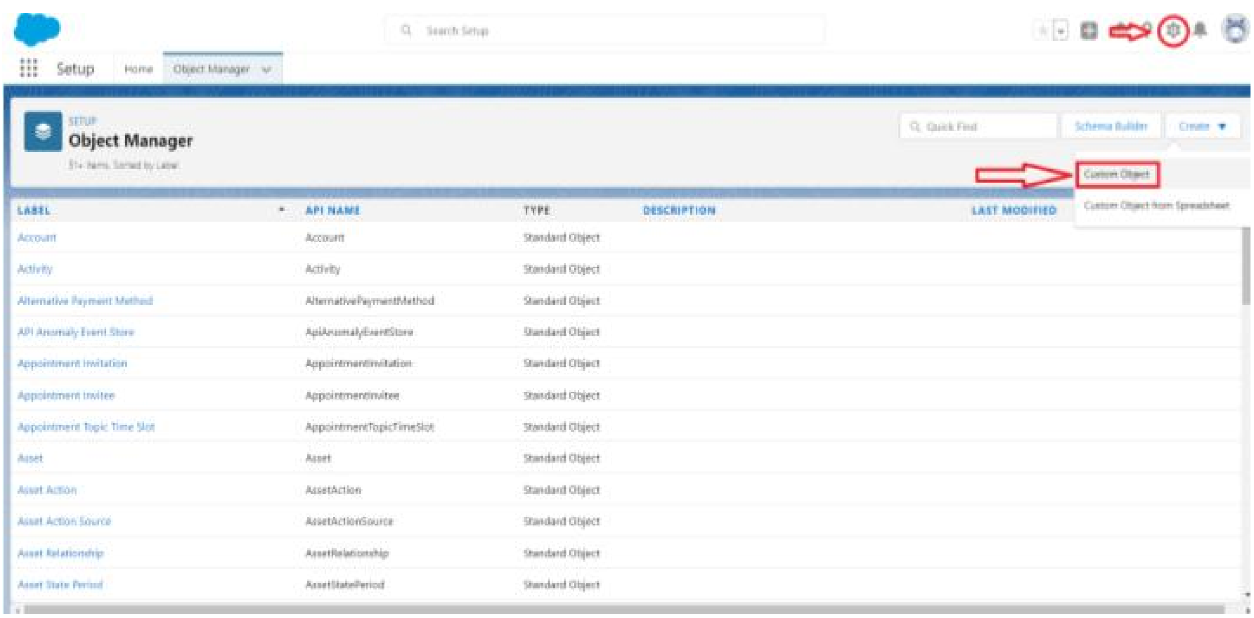
Activity 1:

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.

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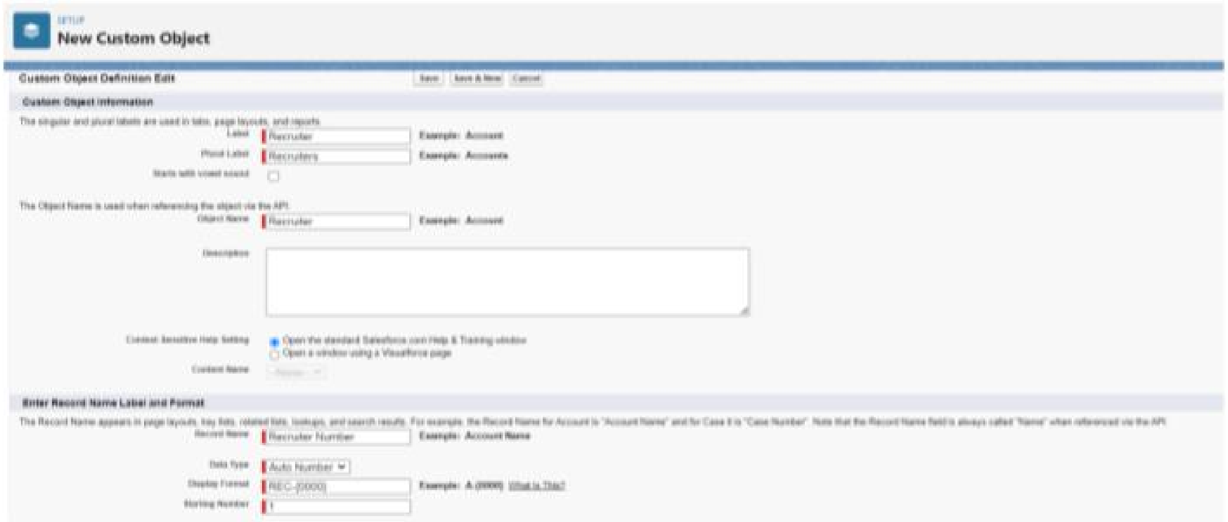

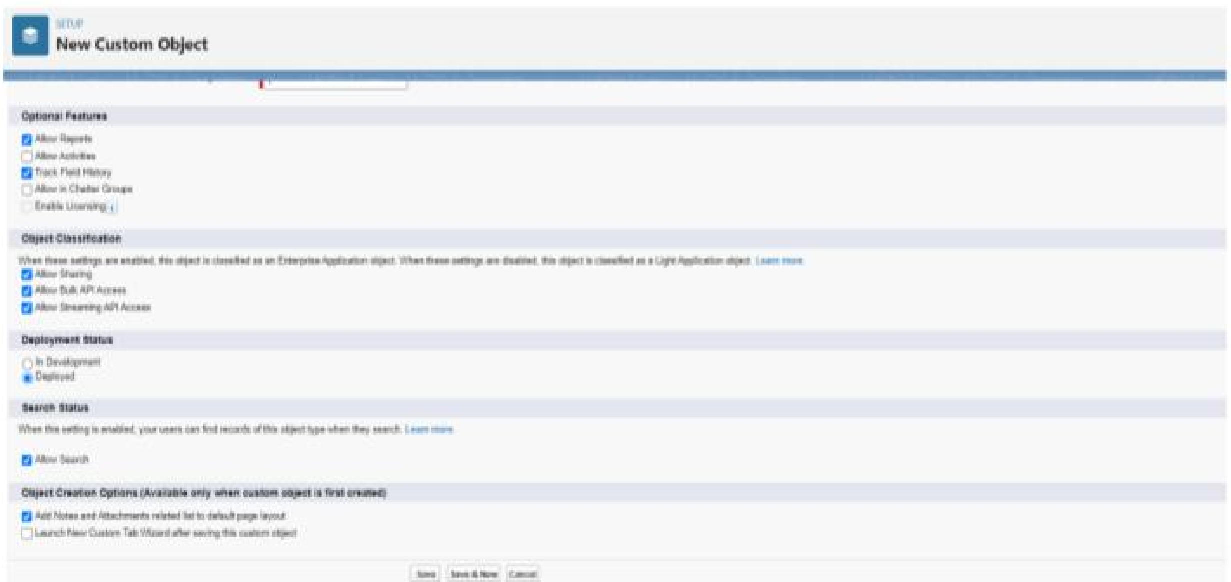

13. Leave everything else as is, and click Save.

Activity 2:

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

   Note :- Follow the steps from the above activity

Milestone 3- Fields:

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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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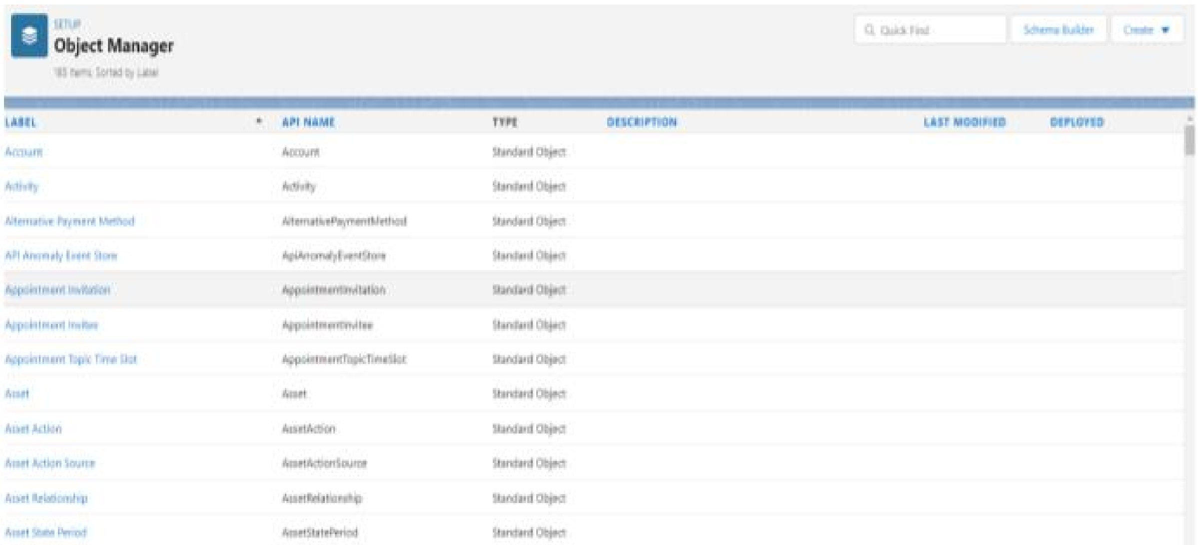
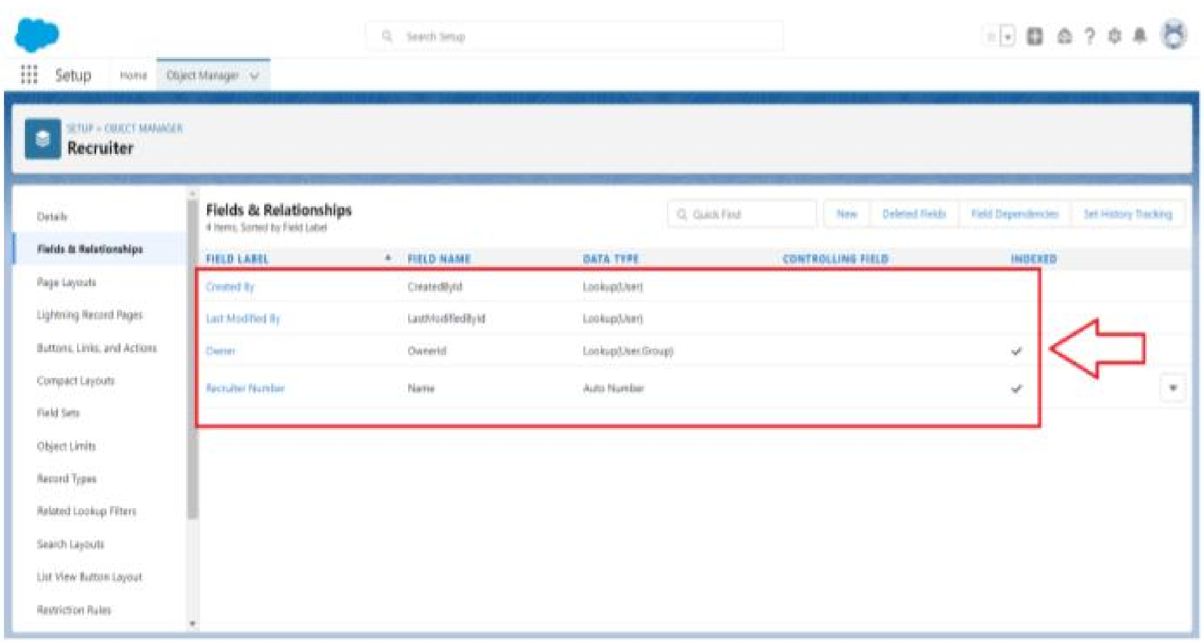


2.From the sidebar, click Fields & Relationships. Notice that there are already some fields there. Those are the standard fields.



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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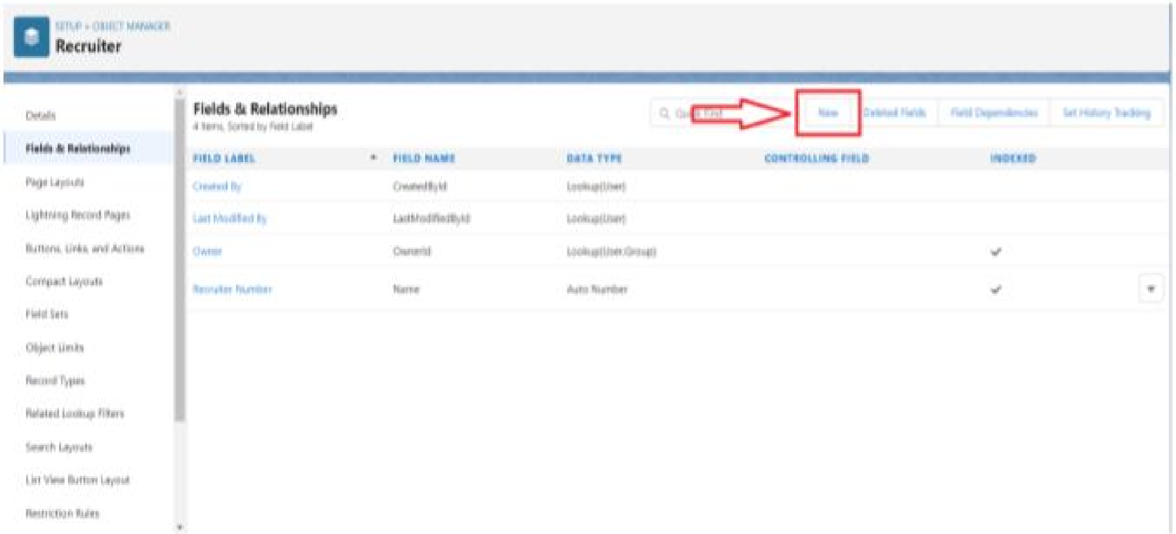
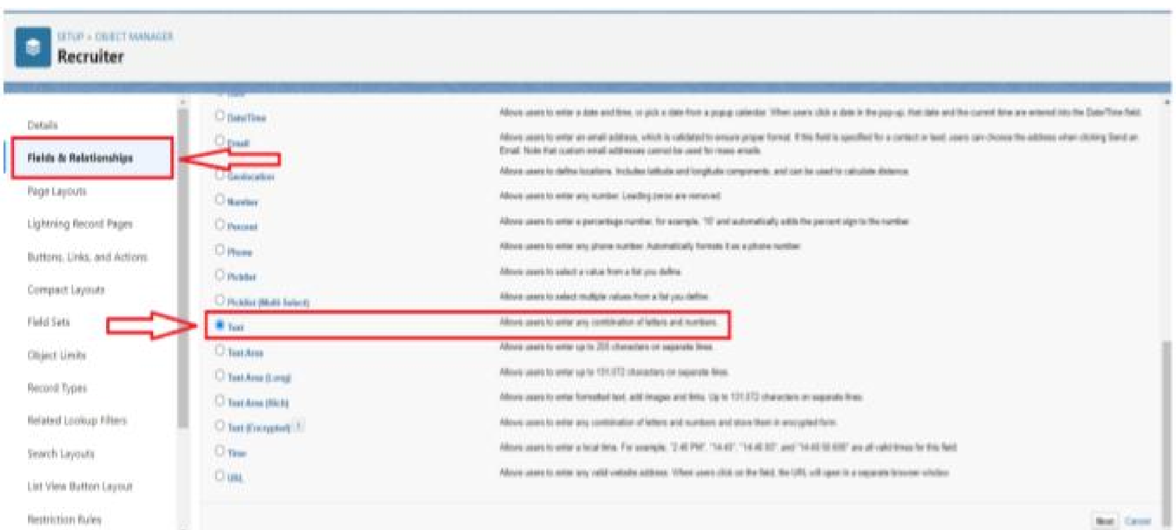


4.Click on the new to create a field.

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



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

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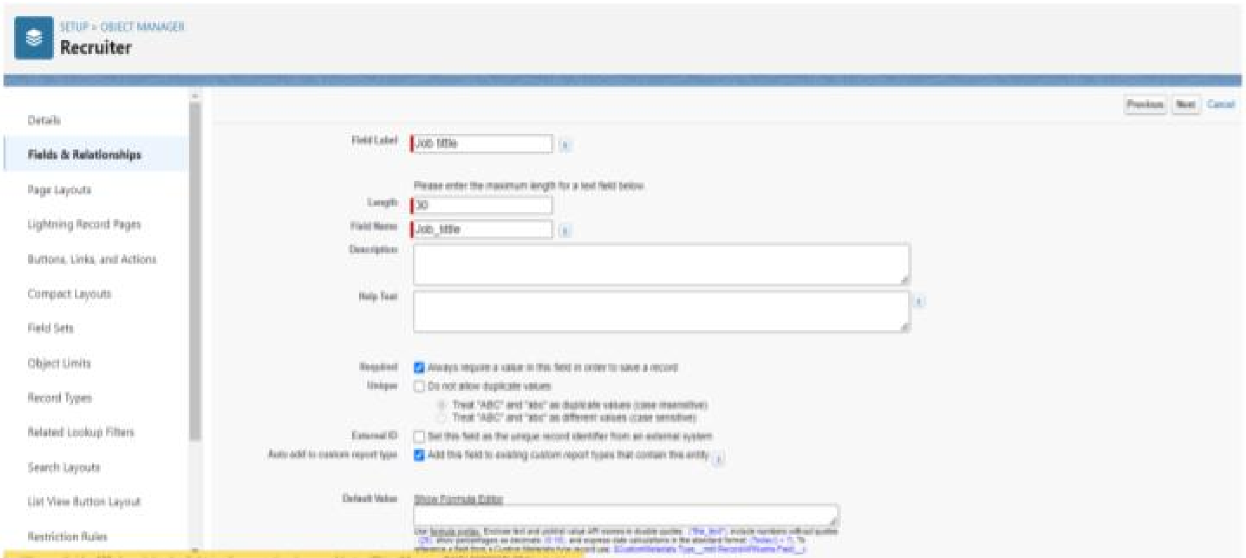

7.Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security. Click next

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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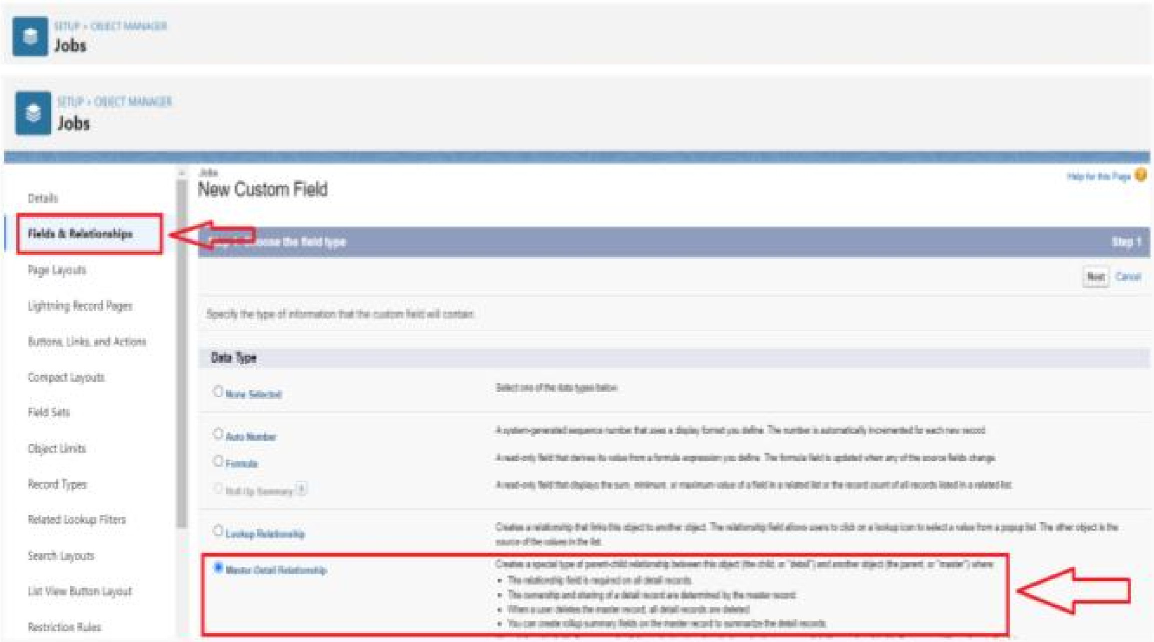
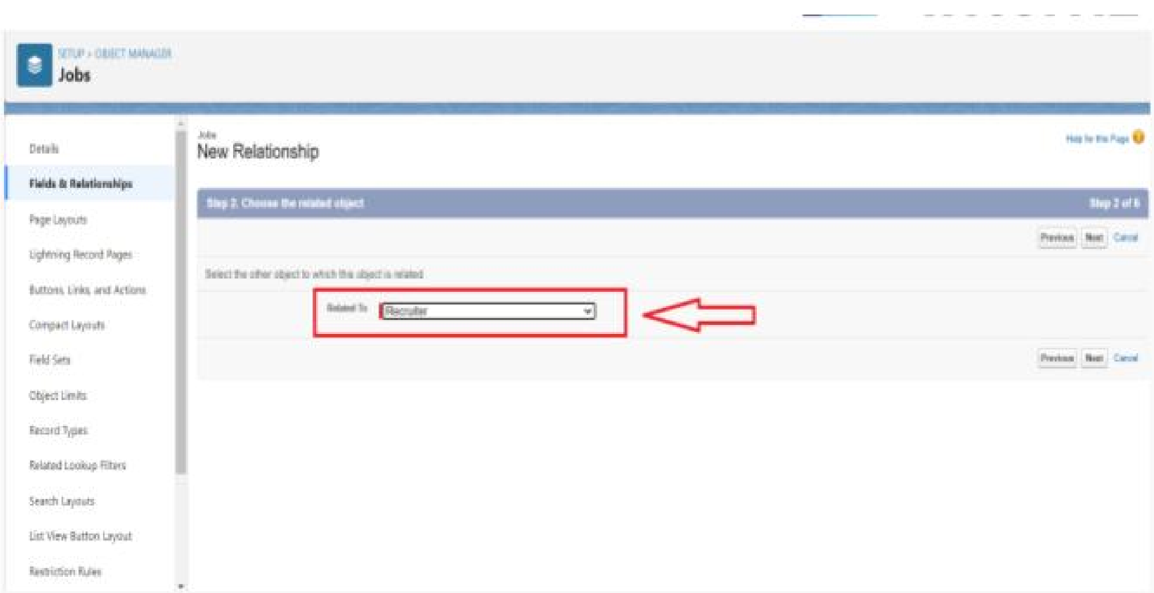


4. Choose Master-detail Relationship and click Next

5. Choose the related object and select that object.



6. Enter the label and name for the lookup field

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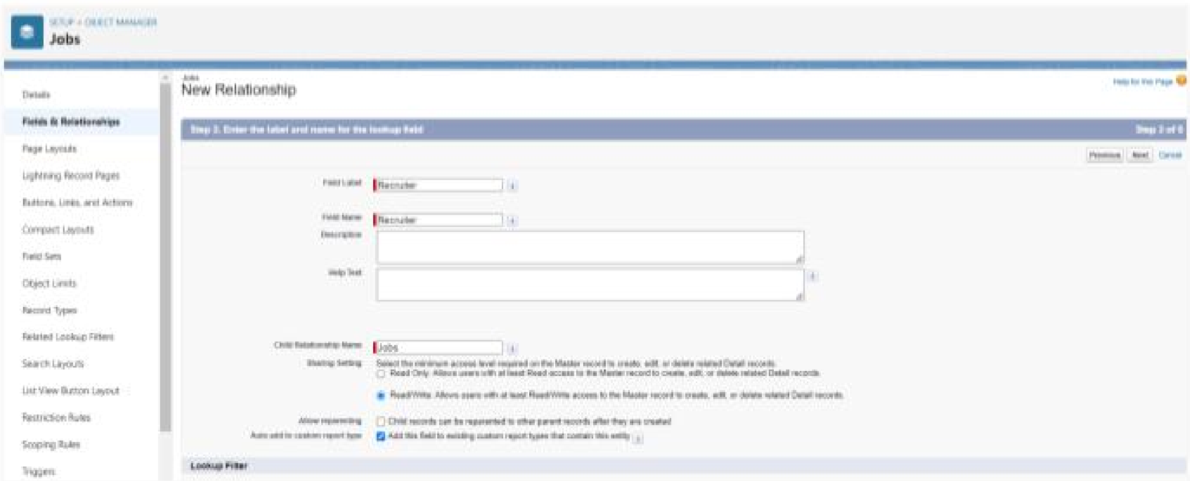
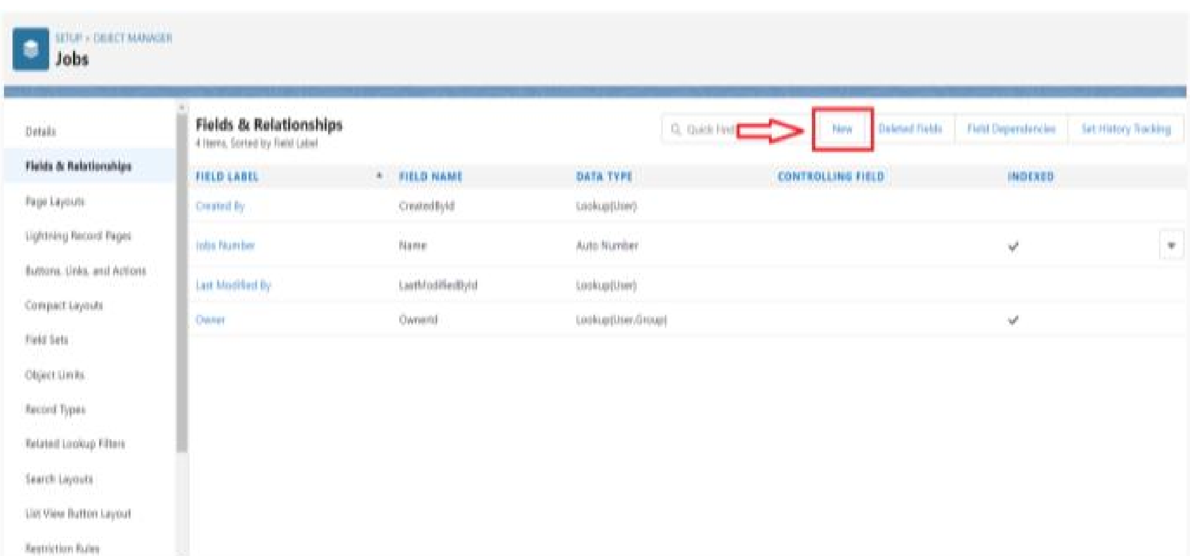


7. Click Next, Next, and Save

Activity 3:

Create a new custom field:

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



4. Choose the data type Text Area click next

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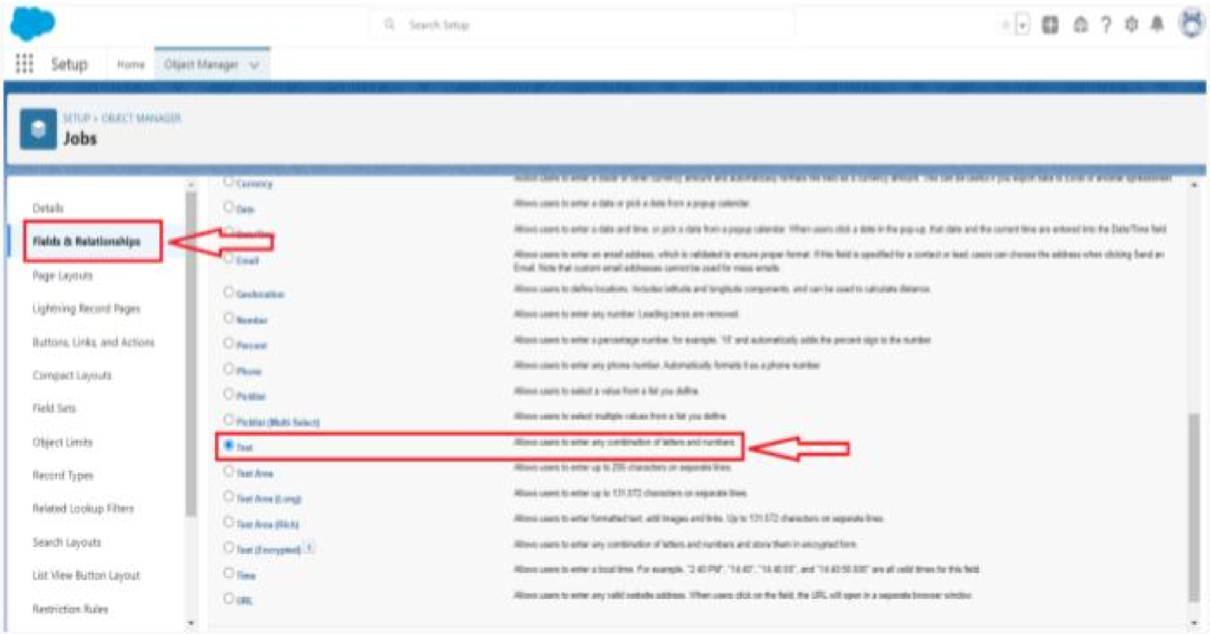
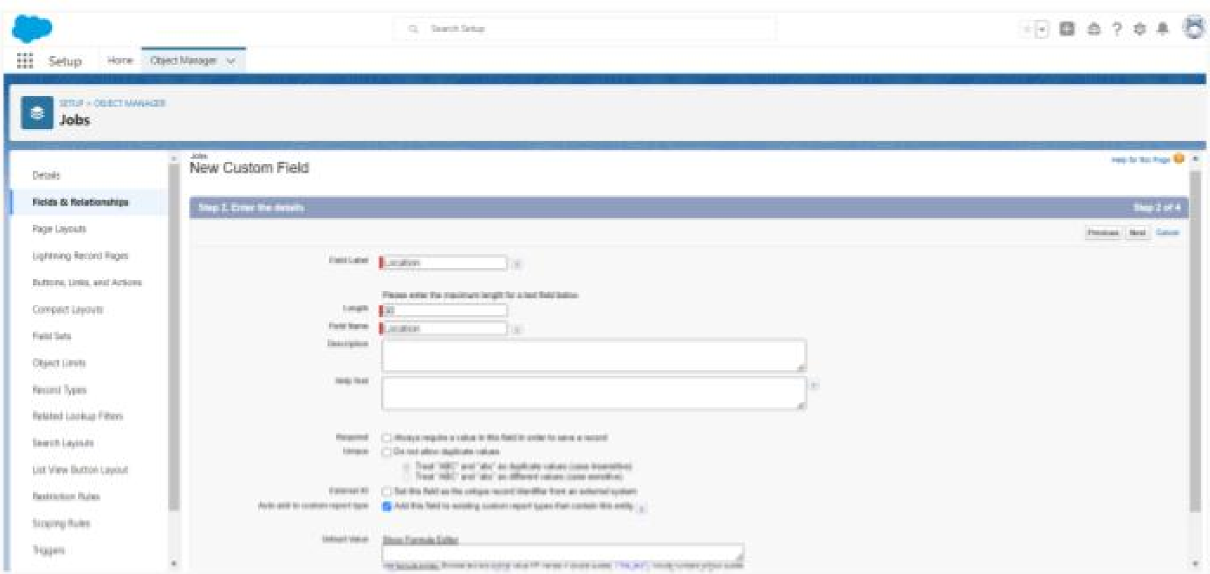


5. Enter the Field Label and field name click next



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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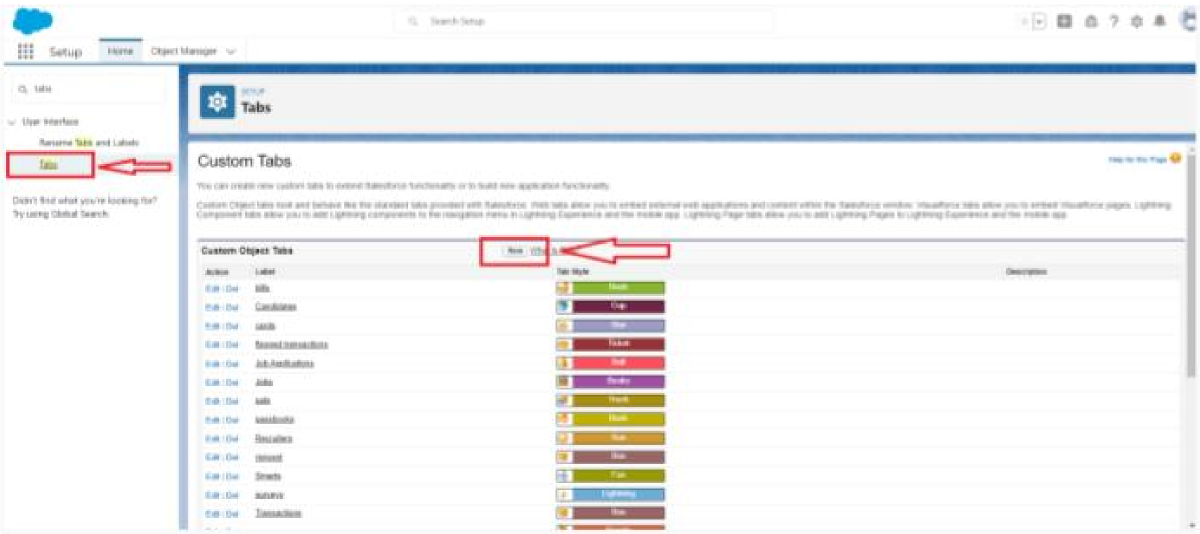
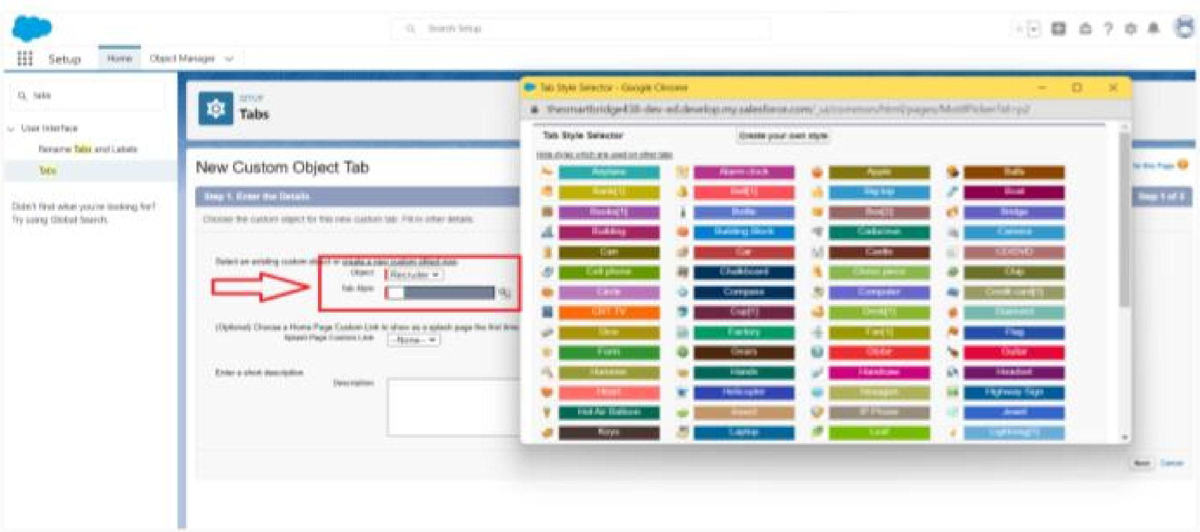


4. Select the created object Recruiter and tab style for the new custom tab.



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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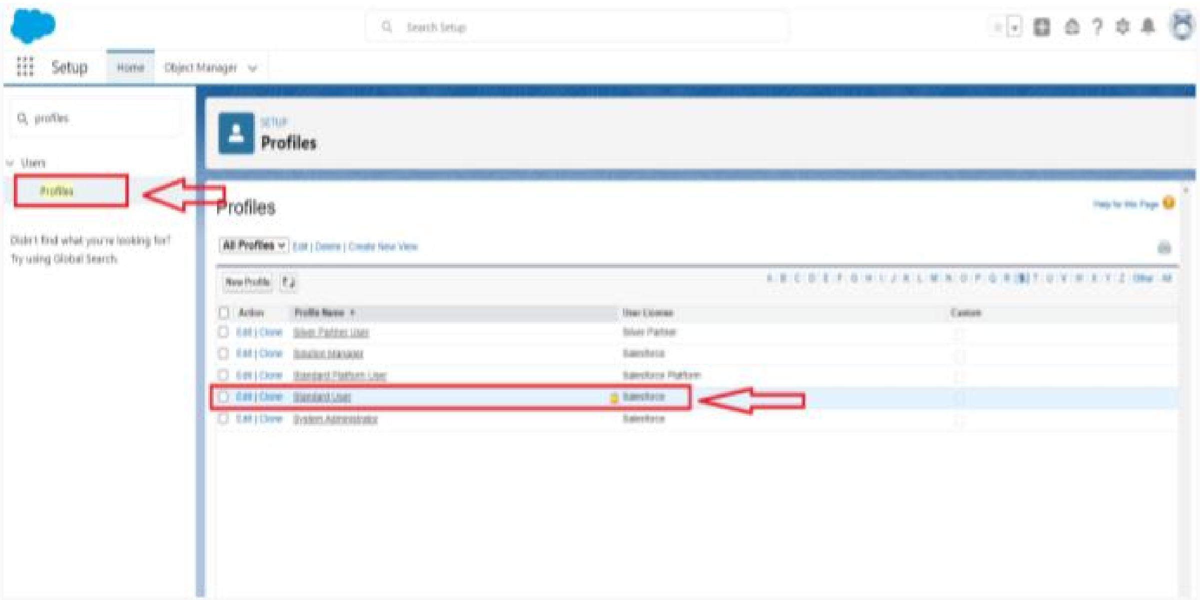
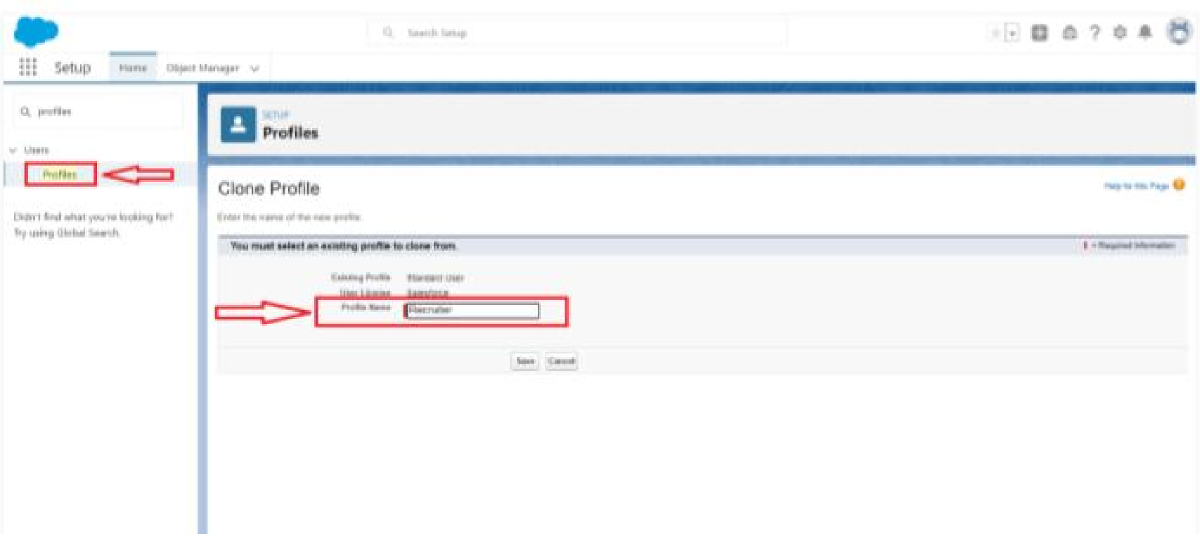
3. Click clone.



4. For Profile, enter Recruiter.
5. Click save.



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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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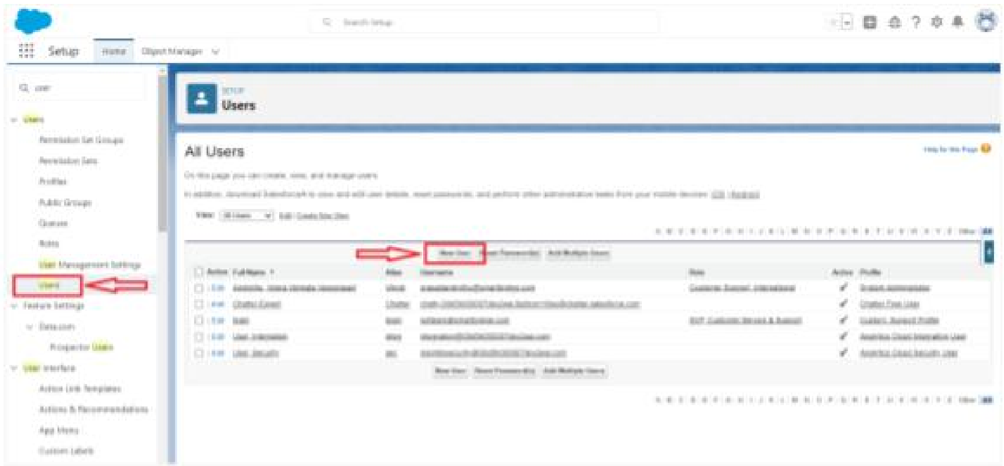

3. Enter First name as Hr and last name as Manager.

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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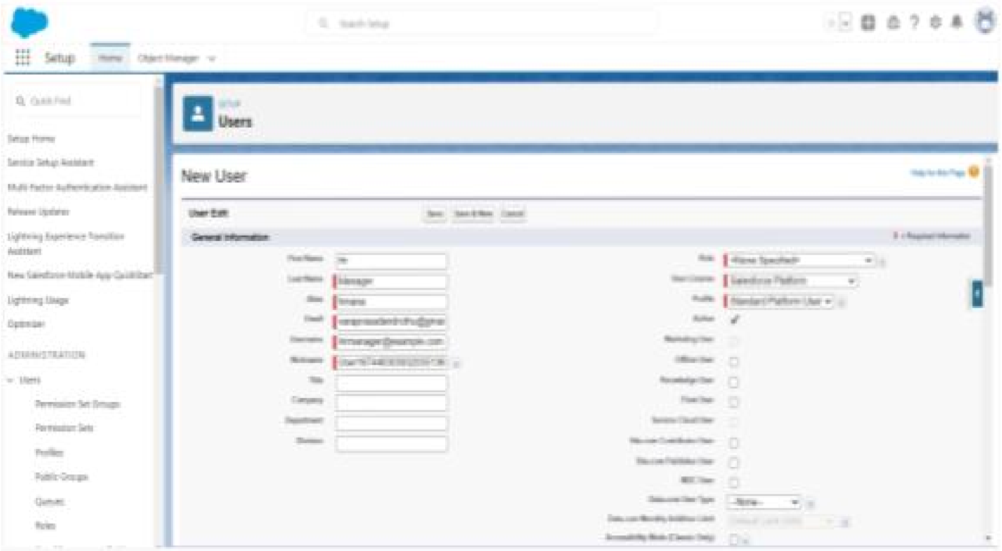

8. Click save

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

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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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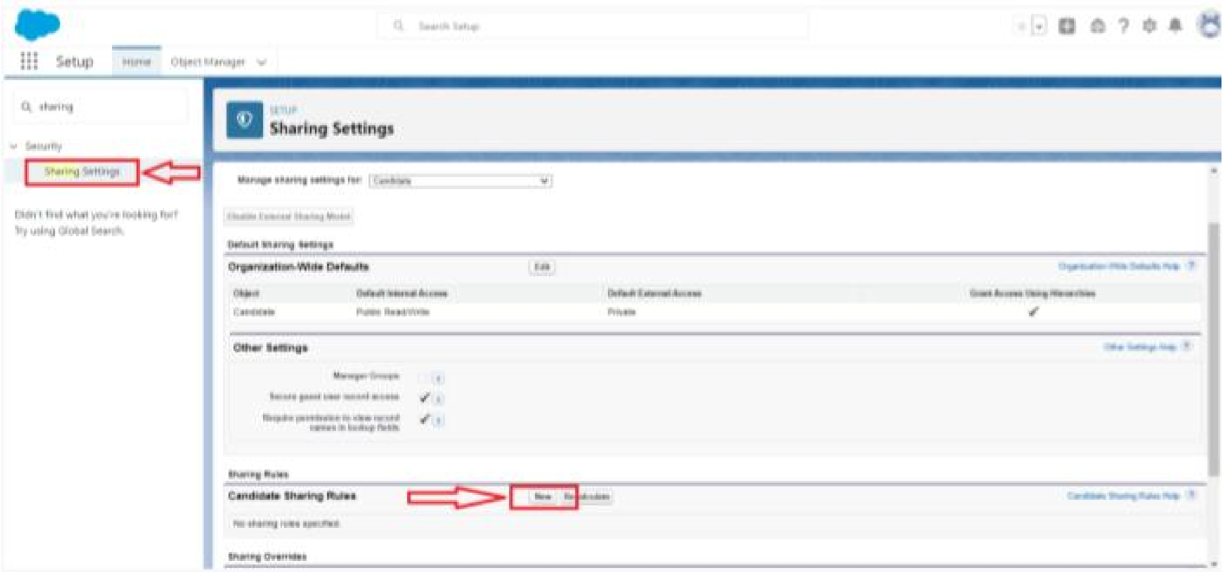

3) Add the label of the sharing rule you want to make.

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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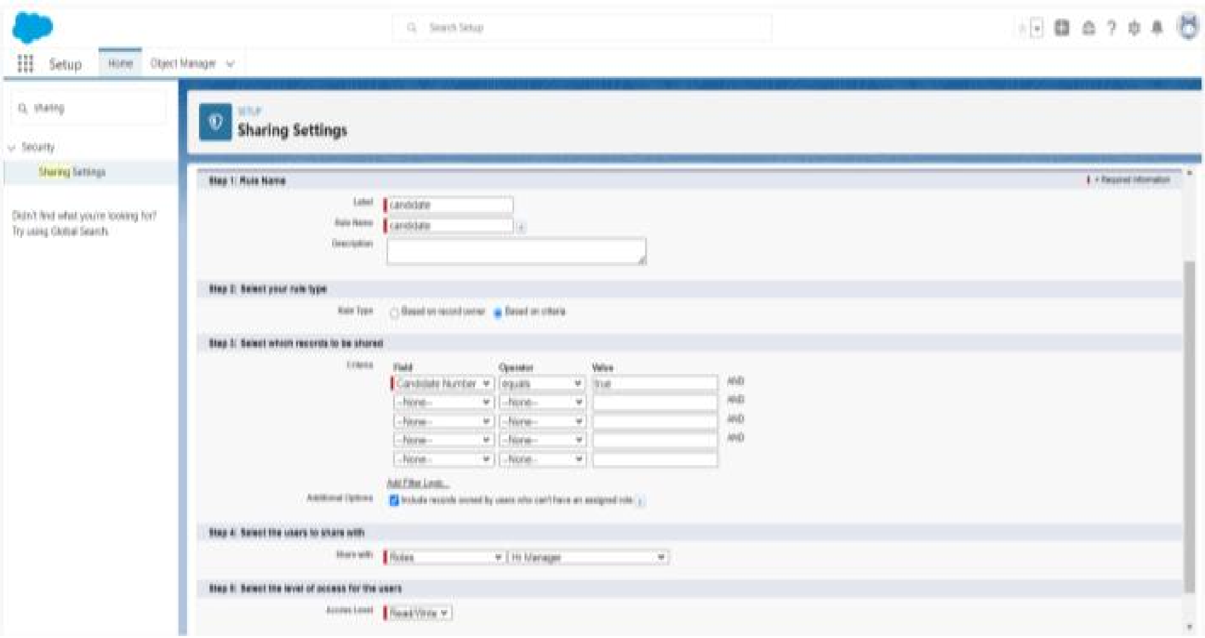

9) And save the rule.

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?

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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.

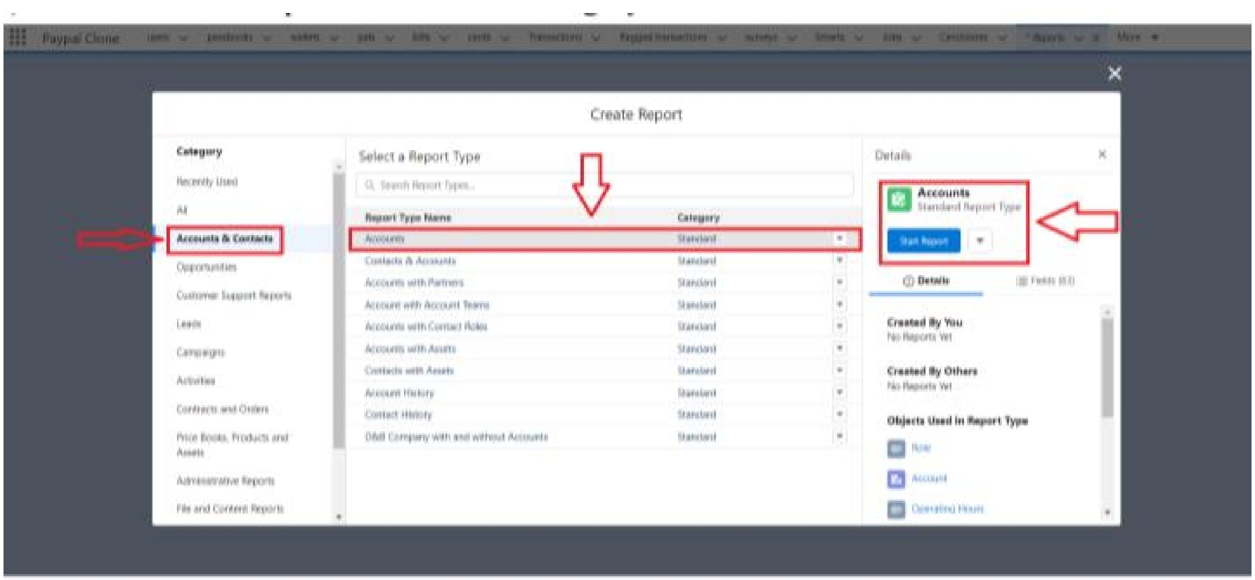
Activity 1:

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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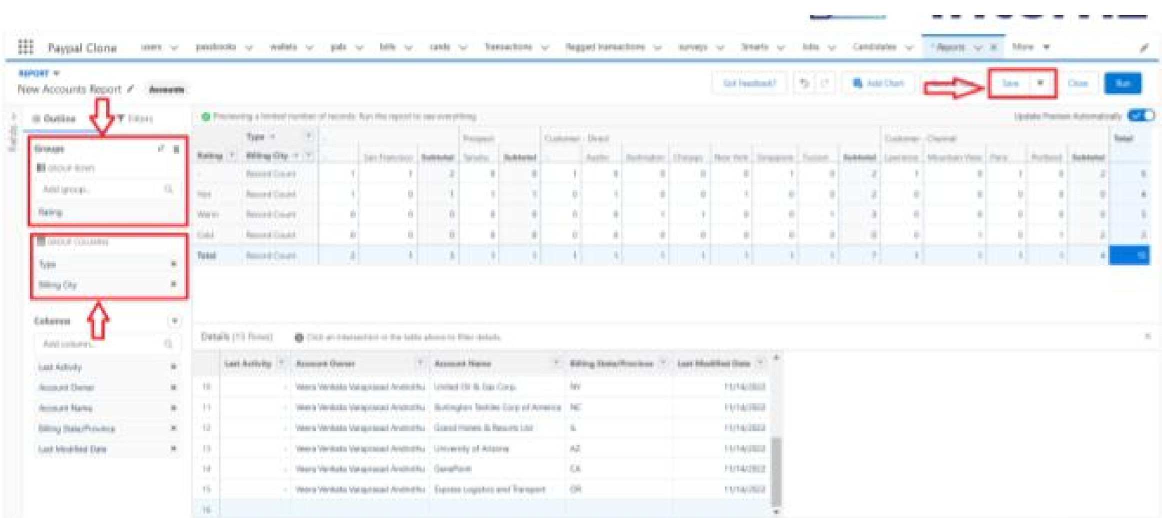
4) In the details section select the option start report.

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.



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.

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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 disvantages 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 resusme 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 recruties 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.

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