

Phase 8: Data Management & Deployment

1. Data Import Wizard

To populate sample data for testing and demonstration, the Salesforce **Data Import Wizard** was used for both standard and custom objects.

Steps Taken:

- Prepared CSV files for **Contacts** and **Job Postings** containing 5 records each.
- Uploaded CSVs via **Setup → Data Import Wizard → Launch Wizard**.
- Mapped CSV columns to Salesforce fields (e.g., FirstName → First Name, Location__c → Location).
- Imported successfully to create initial test data for the project.

Outcome:

- All sample Contacts and Job Postings are now available in Salesforce.
- Enabled creation of **Application** and **Interview** records for testing automation and flows.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar labeled 'Search Setup' is on the right. Below the navigation bar, the page title is 'Monitor Bulk Data Load Jobs'. A sub-header states: 'Monitor the status of recent bulk data load jobs. These jobs are created by Data Loader and other Bulk API client applications.' The main content area is divided into three sections: 'Quota', 'In Progress', and 'Completed last 7 days'. The 'Quota' section shows that the organization has processed 0 batches in the last 24 hours and can process up to 15,000 batches in a 24-hour period. The 'In Progress' section is currently empty, showing 'No records to display.' The 'Completed last 7 days' section contains a table with one record.

Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
750WU00000UWWSB	Manager_HR	26/09/2025, 12:22 am	26/09/2025, 12:22 am	Closed	Bulk V1	Insert	Contact	5	0	00:01

2. Duplicate Rules

To prevent accidental duplicate records and ensure data integrity:


Implementation:

- Created **Matching Rules** on Contact object (Email equals).
- Created **Duplicate Rules** to **Alert** users if duplicate contacts are detected.
- Activated both rules.

Outcome:

- Recruiters cannot create duplicate candidate records.
- Ensures clean and reliable test data for recruitment processes.

Prevent Duplicate Application For the Same Job

 **SETUP**

Duplicate Rules

Application Duplicate Rule

Prevent duplicate applicant for the same Job

Help for this Page

Duplicate Rule Detail

EditDeleteCloneActivate

Rule Name	Prevent duplicate applicant for the same Job	Order	1 of 2 [Reorder]
Description			
Object	Application		
Record-Level Security	Enforce sharing rules		
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of these records?		
Active	<input type="checkbox"/>		
Matching Rule	<div><div>✔</div> Prevent duplicate applicant for the same Job matching rule</div> <div><div>✔</div> Mapped</div>	Matching Criteria	Application: Applicant_Email EXACT MatchBlank = TRUE
Conditions			
Created By	HR Manager, 25/09/2025, 11:24 pm	Modified By	HR Manager, 26/09/2025, 12:03 am

EditDeleteCloneActivate

- Prevent Duplicate Contact

SETUP

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Duplicate Rules

Contact Duplicate Rule

Prevent Duplicate Contact

Help for this Page

Duplicate Rule Detail

Edit

Delete

Clone

Activate

Rule Name

Prevent Duplicate Contact

Order

2 of 2

Reorder

i

Description

Object

Contact

Record-Level Security

Enforce sharing rules

Action On Create

Block

Operations On Create

Alert

Report

Action On Edit

Allow

Operations On Edit

Alert

Report

Alert Text

Use one of these records?

Active

☐

Matching Rule

Standard Contact Matching Rule

Mapped

Matching Criteria

Matching rule for contact records

More info

Conditions

Created By

HR Manager, 25/09/2025, 11:40 pm

Modified By

HR Manager, 25/09/2025, 11:40 pm

Edit

Delete

Clone

Activate

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Prevent Duplicate Job Opening

SETUP

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Duplicate Rules

Job Opening Duplicate Rule

Prevent Duplicate Job Opening

Help for this Page

Duplicate Rule Detail

Edit

Delete

Clone

Deactivate

Rule Name

Prevent Duplicate Job Opening

Order

1 of 1

Reorder

i

Description

Object

Job Opening

Record-Level Security

Bypass sharing rules

Action On Create

Block

Operations On Create

Alert

Report

Action On Edit

Allow

Operations On Edit

Alert

Report

Alert Text

Use one of these records?

Active

☒

Matching Rule

Prevent Duplicate Job Opening matching rule

Mapped

Matching Criteria

Job Opening: Name EXACT MatchBlank = FALSE

Conditions

Created By

HR Manager, 25/09/2025, 10:26 pm

Modified By

HR Manager, 25/09/2025, 10:37 pm

Edit

Delete

Clone


Deactivate

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Prevent Multiple Application for the same job

Duplicate Rule Detail Edit Delete Clone Activate

Rule Name	Prevent Multiple Application For the same Job			Order	2 of 2 [Reorder] 
Description					
Object	Application				
Record-Level Security	Enforce sharing rules				
Action On Create	Block	Operations On Create	<input type="checkbox"/> Alert <input type="checkbox"/> Report		
Action On Edit	Allow	Operations On Edit	<input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report		
Alert Text	Use one of these records?				
Active	<input type="checkbox"/>				
Matching Rule	<input checked="" type="checkbox"/> Standard Contact Matching Rule <input checked="" type="checkbox"/> Mapped		Matching Criteria	Matching rule for contact records. More info	
Conditions					
Created By	HR Manager , 25/09/2025, 11:28 pm		Modified By	HR Manager , 26/09/2025, 12:01 am	

Edit Delete Clone Activate

Activate Windows
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3. Data Loader

- Although the **Data Import Wizard** was sufficient for small datasets, **Data Loader** can be used for bulk insert, update, or export of records.
- In this project, small datasets were handled manually or via the Import Wizard due to time constraints.

4. Data Export & Backup

- Regular backups are critical for data safety.
- Salesforce **Data Export** feature can be used to export all records and metadata.
- For the project, manual export of Contacts, Job Postings, Applications, and Interviews was demonstrated.

- I Have Exported All the data in this Zip File.
- [WE_00DWU00000VnOdg2AF_1.ZIP](#)

6. VS Code & SFDX

- **VS Code** with Salesforce Extensions was used for development and deployment of:
 - Apex Classes & Triggers
 - Lightning Web Components

- Metadata retrieval
- **SFDX Commands** help in pushing/pulling changes between local and org.

Outcome:

- Demonstrates modern Salesforce development practices.
- Enables easy tracking, version control, and deployment of all project components.
- I have imported all the data of salesforce in the vs code of connecting vs code to my org and pushed it in the project GitHub repository. This was Done by me in the previous phase only .

Phase 9: Reporting, Dashboards & Security Review

In this phase, the focus was on building insights, monitoring business processes, and ensuring data security within the Salesforce environment. The following tasks were implemented:

1. Reports

Different types of reports were created to analyse recruitment data and provide meaningful insights:

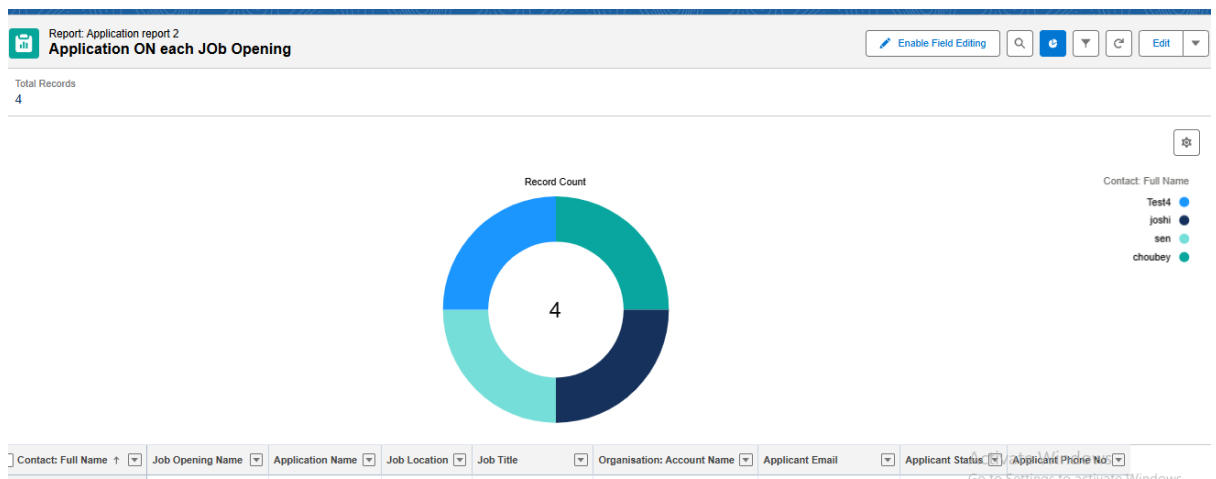
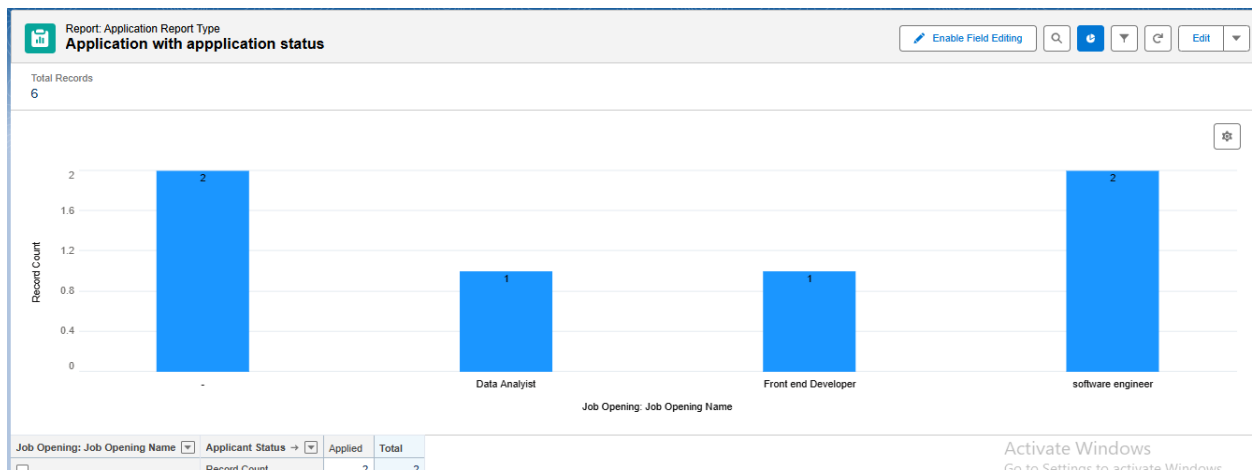
- **Tabular Reports:**
Simple record listings, such as a list of all Candidates or Job Applications.
- Simpler report on the active job opening

Report: Reports On Job Opening							
Report on Job Opening							
Total Records		Total No of openings		Total Salary Rate			
5		630		0			
	Job Opening Name	Application Deadline	Employment Type	Job Posting Date	No of openings	Organisation: Account Name	Salary Rate
1	software engineer	-	Fulltime	-	100	TCS	-
2	Software Developer	-	Fulltime	-	50	TCS	-
3	Front end Developer	02/10/2025, 12:00 pm	Fulltime	26/09/2025	120	Infosys	-
4	Data Analyst	30/09/2025, 12:00 pm	Fulltime	25/09/2025	210	congnizant	-
5	Data Scientist	01/10/2025, 12:00 pm	Fulltime	26/09/2025	150	Persistant	-
6					630		0

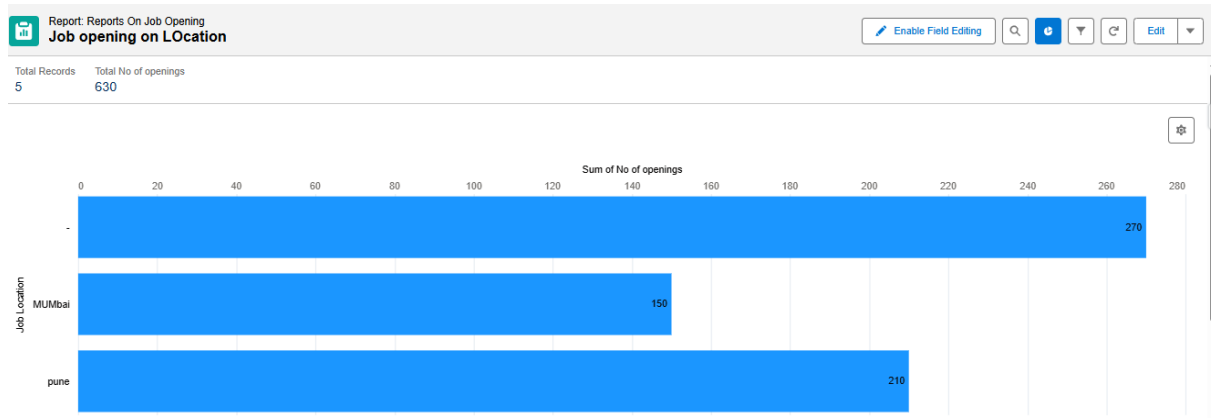
Report: Application Report Type Report On applications							
<div> <div>Enable Field Editing</div> <div>Q</div> <div>Add Chart</div> <div>▼</div> <div>↺</div> <div>Edit</div> </div>							
Total Records 6							
	Applicant Email	Applicant Status	Application Name	Application ID	Contact: Full Name	Job Opening: Job Opening Name	Application Submitted ON
1	-	Applied	std-0004	a01WU00001HULgN	sen	Front end Developer	-
2	ishanjatav06@gmail.com	Applied	std-0002	a01WU00001HQH1K	Test4	software engineer	-
3	-	Applied	a01WU00001GpXVz	a01WU00001GpXVz	Test3	-	-
4	-	Applied	std-0005	a01WU00001HULzB	choubey	software engineer	-
5	ishan@ishan.com	Applied	std-0001	a01WU00001GkbpF	-	-	-
6	-	Applied	std-0003	a01WU00001HULfq	joshi	Data Analyst	-

- Summary Reports:**
 Applications grouped by **Job Posting** or **Status** to quickly visualize recruitment progress.

Application grouped by application Status



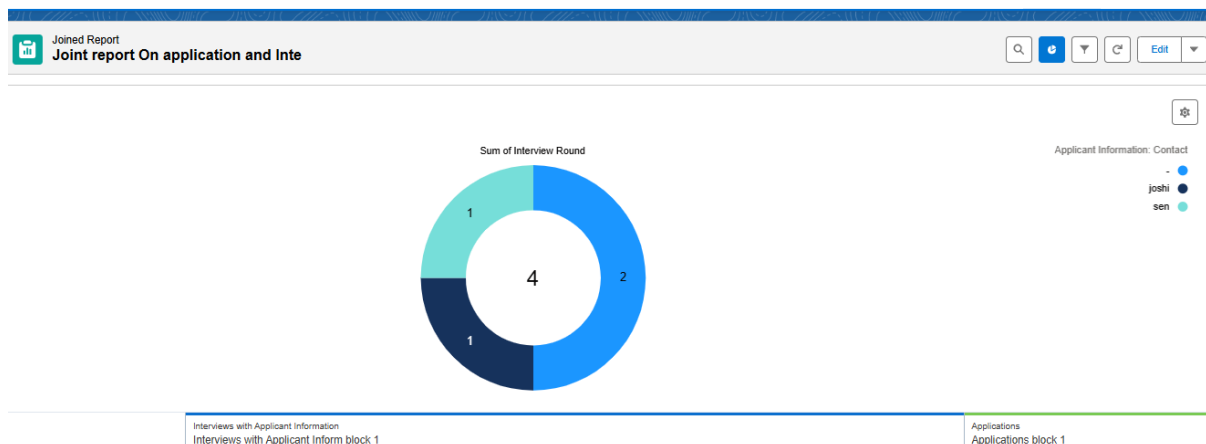
Applicaitions On each Job Opening



Job Opening Grouped by Location

- Matrix Reports:**
 Applications summarized by **Recruiter vs. Status**, giving a two-dimensional view of workload distribution.
- Joined Reports:**
 Applications and Interviews displayed together, helping track how many interviews were scheduled per application.

Joint Report on Application and Interview



2. Report Types

Custom Report Types were created to combine related objects such as:

- Applications with Job Postings**

Details

Display Label Application Report 1

API Name Application_Report_1

Description This another application report type

Created By HR Manager, 9/26/25, 9:29 AM

Store in Category other

Deployment Status Deployed

Modified By HR Manager, 9/26/25, 9:29 AM

Fields

Source Object	Included Fields
Applications	18
Interviews	20

Object Relationships

Applications (A)

with at least one related record from Interviews (B)

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• Applications with Interviews

Details

Display Label Application report 2

API Name Application_report_2

Description Another Report Type for application

Created By HR Manager, 9/26/25, 9:52 AM

Store in Category other

Deployment Status Deployed

Modified By HR Manager, 9/26/25, 9:52 AM

Fields

Source Object	Included Fields
Job Openings	21
Applications	17

Object Relationships

Job Openings (A)

with at least one related record from Applications (B)

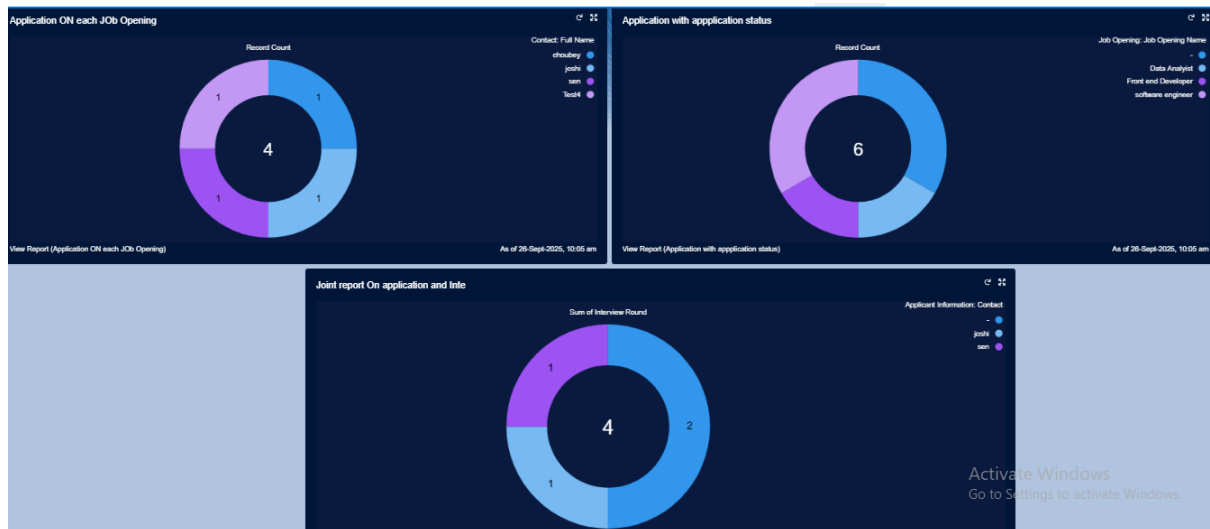
This enabled cross-object reporting to evaluate candidate progress throughout the hiring pipeline.

3. Dashboards

Dashboards were built to visually represent key recruitment KPIs:

- **Applications by Status** (Open, Approved, Rejected)
- **Applications per Job Posting**
- **Applications Selected for the interviews**

Each dashboard component provided recruiters with real-time insights into the hiring process.



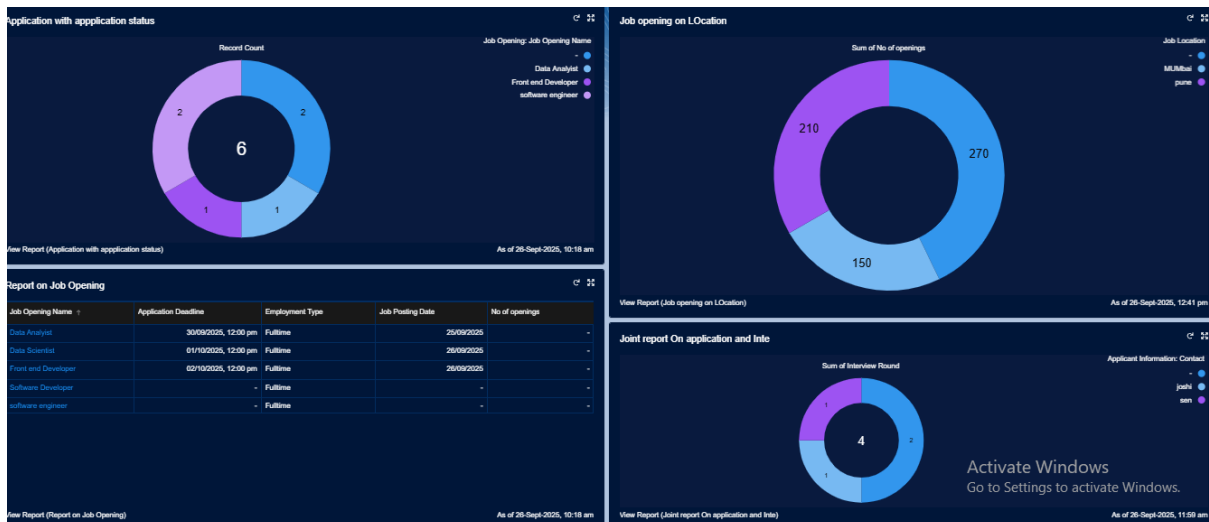
4. Dynamic Dashboards

Dynamic Dashboards were configured to ensure that users only see the data relevant to them. For example, if multiple recruiters are present, each recruiter would only see their own job applications and interviews. This was achieved by setting the dashboard

to run as the **logged-in user**, ensuring personalized views without the need for duplicate dashboards.

Dynamic Dashboard Includes

- **Application with application status**
- **Job opening with location**
- **Active job opening**
- **Applications selected for the interview**



5. Security Review


To ensure data integrity and compliance, several security measures were reviewed and implemented:

- **Sharing Settings:** Configured object-level and record-level access so that sensitive candidate and job data was only available to authorized users.
- I made application, interviews object private for the record level security and the job opening as public read only so the candidate can view the job opening.

Application	Private	Private	✓
Interview	Private	Private	✓
Job Opening	Controlled by Parent	Controlled by Parent	✓

- **Field-Level Security:** Restricted sensitive fields such as candidate contact details, ensuring only specific profiles could view or edit them. Hidden salary information from the external users.

Job salary field level security

 SETUP		
High Volume Customer Portal	<input type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - API Only Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	
Work.com Only User	<input type="checkbox"/>	

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- **Session Settings:** Enforced stricter login and session timeouts for security.
- **Login IP Ranges:** Configured IP restrictions for admin-level access, enhancing system security.
- **Audit Trail:** Enabled to keep track of all configuration changes, ensuring accountability and traceability.