

Phase 4: Process Automation (Admin)

Overview

In this phase, various Salesforce automation tools were implemented to streamline the recruitment process in the Smart Recruiter ATS system. The goal was to reduce manual effort, improve communication with candidates, and ensure consistent approval and notification processes.

- ### Validation Rules

Ensured data quality and mandatory field entry.

Validation rules on Job Opening

<div>Validation Rules</div> <div>2 Items, Sorted by Rule Name</div>					<div>New</div>
RULE NAME	▲	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Date_Validation		Application Deadline	The job opening start date should be less than the end date	✓	HR Manager, 18/09/2025, 7:05 pm
Job_Title		Job Title	Please provide the job title	✓	HR Manager, 18/09/2025, 7:09 pm

Validation Rule on Application Object - This rule states that no more applications can be created if the job opening last date is smaller than the day the application was submitted.

Validation Rules					New
1 Items, Sorted by Rule Name					
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Application_creation_Validation	Top of Page	You cannot fill the application no more the job is created	✓	HR Manager, 22/09/2025, 11:51 pm	▼


Validation rules on interview object

- **Feedback validation** – after the interview is being completed feedback just be given.
- **INTERVIEW Date Validation** – the date on which the interview i being scheduled should be greater than today.

Validation Rules					New
3 Items, Sorted by Rule Name					
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Feedback_Validation	Top of Page	Give the Feedback	✓	HR Manager, 18/09/2025, 7:49 pm	▼
Interview_Date_validation	Interview Date & Time	Please check the interview date You provided	✓	HR Manager, 22/09/2025, 5:39 pm	▼
Interview_Date_Validation2	Interview Date & Time	Provide the Interview Date and time so the interview can be scheduled	✓	HR Manager, 18/09/2025, 7:52 pm	▼

Approval Process

- Job Opening - As we know the recruiter cannot post the job opening on this own decision. They need to take approval from Hr manager. Through this approval process it is possible.
- When recruiter creates job opening the job opening status remains inactive once the approval is made from the HR the status becomes active for the job opening


Approval Processes

[Edit](#) | [Remove](#) | Field Update

[Job status](#)

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Job posting status approval		Job Opening: Job Posting status EQUALS in-active , else Approve	User:HR Manager	Final Rejection

Final Approval Actions

[Add Existing](#) | [Add New](#)


Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Email Alert	Job opening
Edit Remove	Field Update	Job Status approved

Final Rejection Actions

[Add Existing](#) | [Add New](#)

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

- Application Selection - When a candidate is being shortlisted the candidate detail are sent the HR for hiring approval then the status is marked as selected.


Approval Processes

Initial Submission Actions
Add Existing
Add New

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Update Application Status

Approval Steps
Show Actions
Edit

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
	1	Candidate Approval for selection			UserHR Manager	Final Rejection

Final Approval Actions
Add Existing
Add New

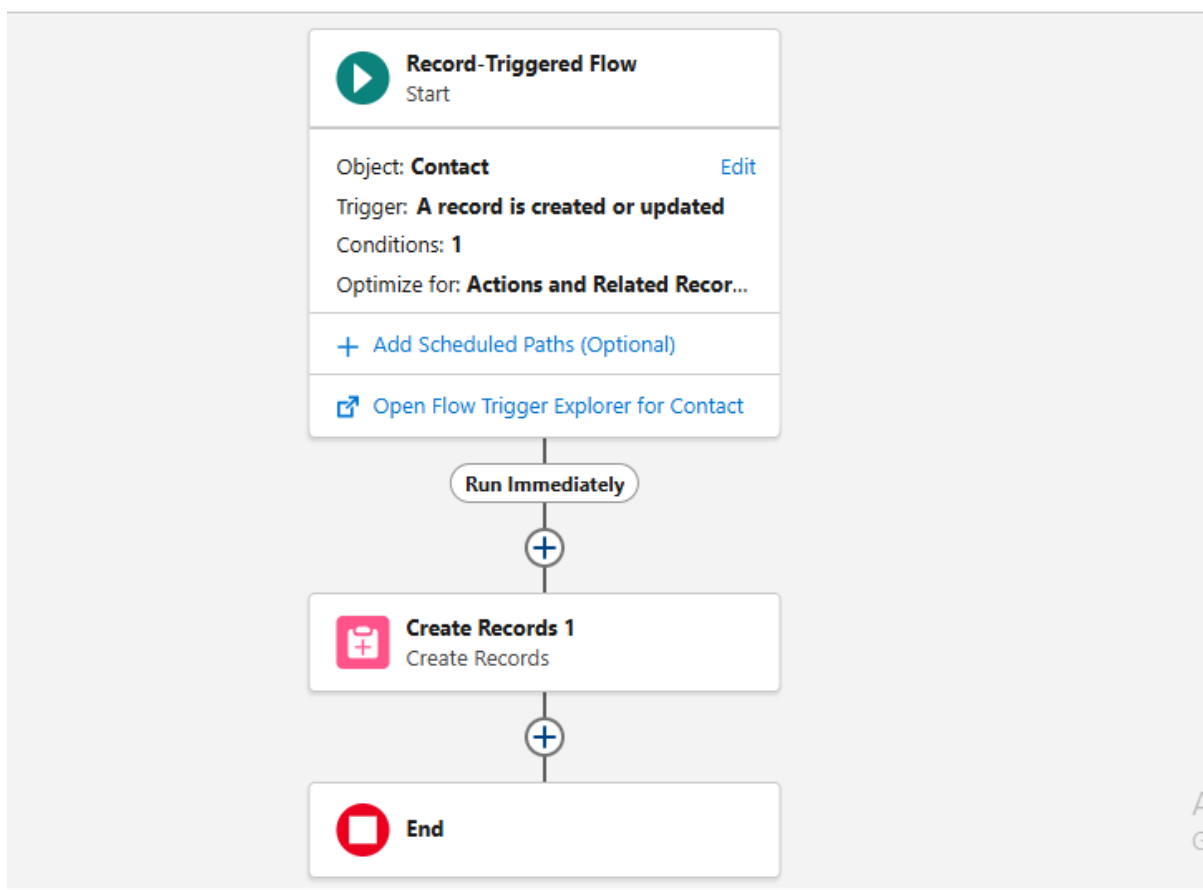
Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Final Approval

Final Rejection Actions
Add Existing
Add New

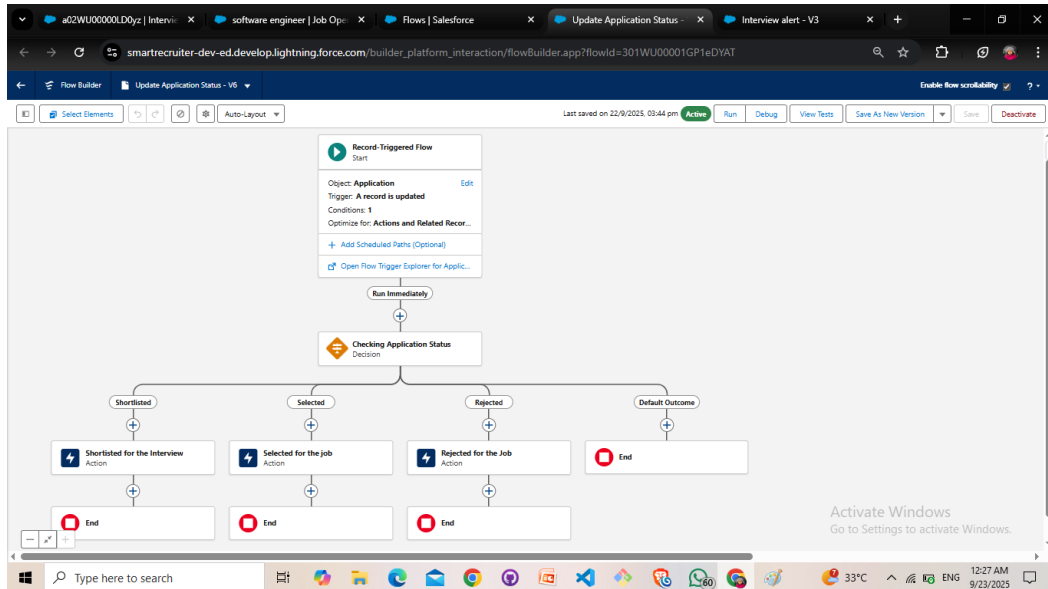
Action	Type	Description
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Flows

- Record-Triggered Flows
 - Auto-create Application records when an Applicant submits details.

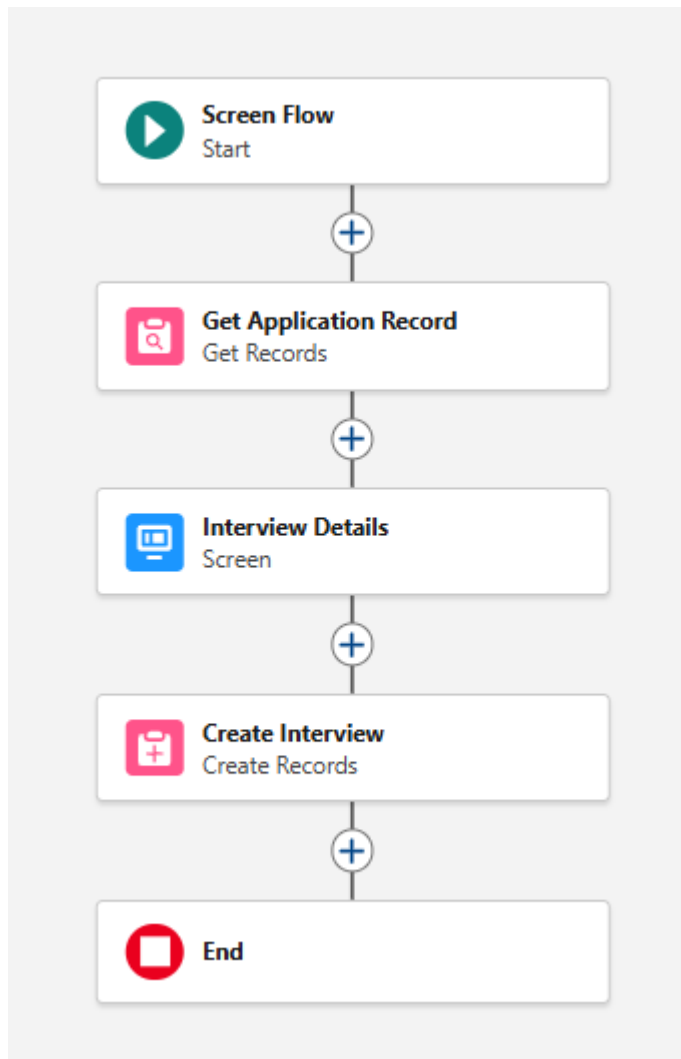


- Update Application status changes and send notifications to Candidates/Recruiters.

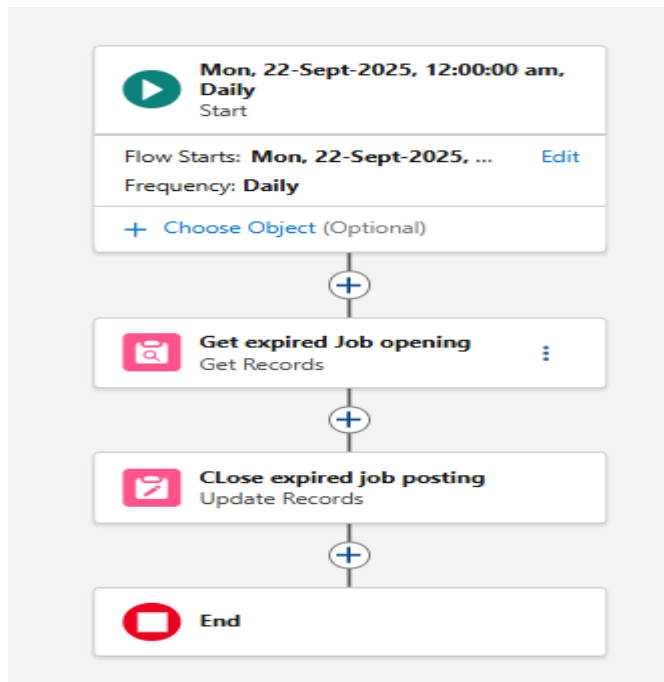


- Screen Flows

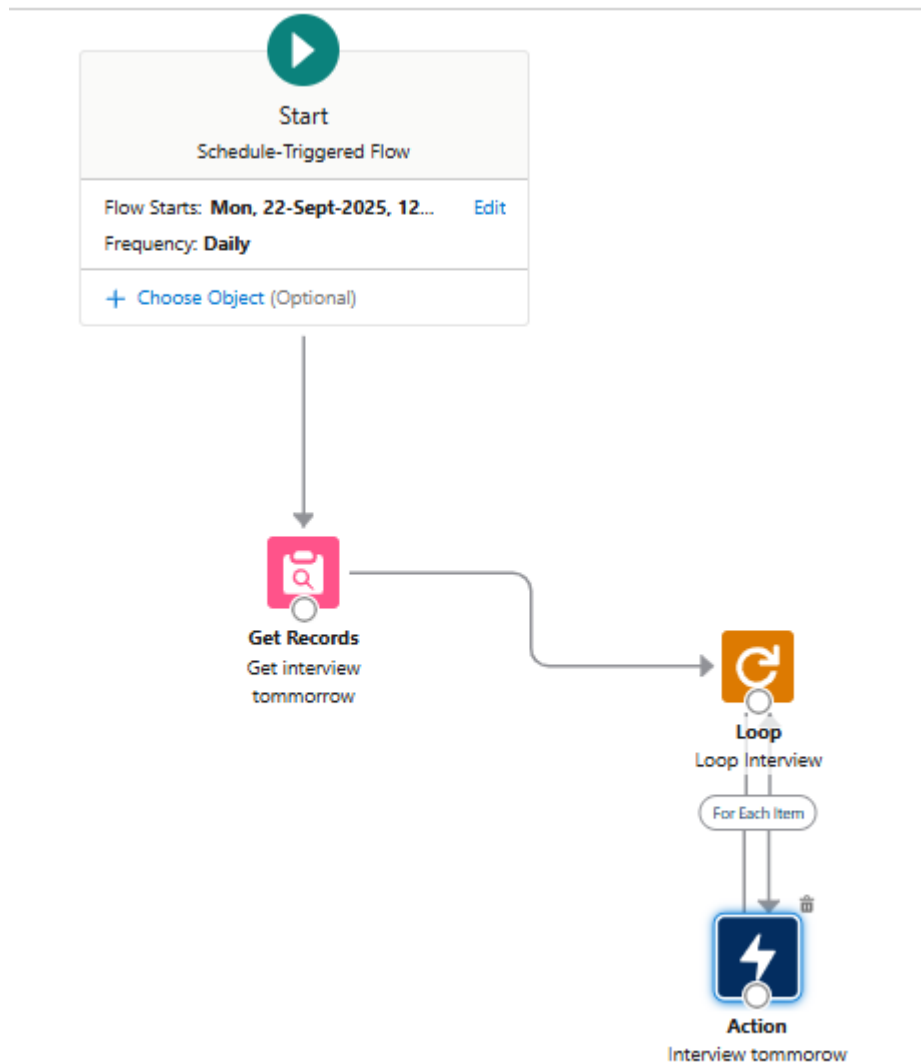
- Interview Scheduling: Recruiters can schedule interviews with date/time, interviewer selection, and mode (online/offline).



- Scheduled Flows
 - Job Posting Auto Close: Automatically closes job postings past their deadline.



- Interview Reminder: Sends email/SMS reminders to Applicant and Recruiters one day before the interview.



Email Alerts

- Automated emails to Candidates and Recruiters at key events:
 - Application status updates (Shortlisted, Interview Scheduled, Rejected).
 - Interview reminders – emails are being sent before the interview to both the interviewer and applicant selected for the interview

Field Updates

- Automated updates of record fields based on flow conditions, e.g., updating Application Status when HR approves/rejects.

Tasks

- Automatically created tasks for recruiters when interview is scheduled, ensuring follow-ups.

Custom Notifications

- Real-time notifications to users inside Salesforce for important events such as:
 - Interview scheduled, mode of notifications are emails.
 - Application approved or rejected.

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