

# Internal Job Application Management System CRM

**Prepared by :** Gollapalli.Lakshmi Tulasi Jyothi Sri

**Phase 4:** Process Automation (Admin)

**Batch :** 4

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## 1.Overview

Phase 4 implemented automation using Flows, Email Templates, and Email Alerts. This allowed real-time status updates and professional communication with candidates, reducing manual HR effort while improving responsiveness and consistency.


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## 2. Email Templates

- Setup → Email Templates → New.
- Create 4 professional templates:
  - Under Review
  - Shortlisted
  - Selected
  - Rejected
  - Interview Details template

### 1.Under Review

# Subject: Your Job Application is Under Review



SETUP

Classic Email Templates

Text Email Template

Under\_Review\_Template

Preview your email template below.

Email Template Detail

EditDeleteClone

Email Templates from Salesforce	Unfiled Public Classic Email Templates		
Email Template Name	Under_Review_Template	Available For Use	✓
Template Unique Name	Under_Review_Template	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Gollapalli Lakshmi Tulasi Jyothi Sri [Change]		
Description			
Created By	Gollapalli Lakshmi Tulasi Jyothi Sri, 9/20/2025, 12:21 AM	Modified By	Gollapalli Lakshmi Tulasi Jyothi Sri, 9/22/2025, 8:40 AM

EditDeleteClone

Email Template

Send Test and Verify Merge Fields

Subject

Your Application is Under Review

Plain Text Preview

Hello {!Application\_\_c.Candidate\_Name\_\_c},

Thank you for applying for the role of {!Application\_\_c.Job\_Title\_\_c} at Pragati Solutions.

Our recruitment team has received your application and it is currently under review.


We will get back to you with the next steps shortly.

Best Regards,

HR Team

## 2. Shortlisted

# Subject: Congratulations! You’ve Been Shortlisted



SETUP

Classic Email Templates

Preview your email template below.

Email Template Detail

EditDeleteClone

Email Templates from Salesforce	Unfiled Public Classic Email Templates		
Email Template Name	Shortlisted	Available For Use	✓
Template Unique Name	Shortlisted	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Gollapalli Lakshmi Tulasi Jyothi Sri [Change]		
Description			
Created By	Gollapalli Lakshmi Tulasi Jyothi Sri, 9/21/2025, 10:56 AM	Modified By	Gollapalli Lakshmi Tulasi Jyothi Sri, 9/22/2025, 8:38 AM

EditDeleteClone

Email Template

Send Test and Verify Merge Fields

Subject

Congratulations! You are Shortlisted

Plain Text Preview

Hello {!Application\_\_c.Candidate\_Name\_\_c},

Great news! You have been shortlisted for the role of {!Application\_\_c.Job\_Title\_\_c} at Pragati Solutions.

Our HR team will reach out with further details soon.

Thank you for your interest and effort during this stage.

Best Regards,

HR Team

## 3 .Selected

# Subject: You've Been Selected!

SETUP

Classic Email Templates

Text Email Template

Selected

Preview your email template below.

Email Template Detail

Edit

Delete

Clone

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	✓
Email Template Name	Selected	Last Used Date	
Template Unique Name	Selected	Times Used	
Encoding	Unicode (UTF-8)		
Author	Gollapalli Lakshmi Tulasi Jyothi Sri <a href="#">[Change]</a>		
Description			
Created By	Gollapalli Lakshmi Tulasi Jyothi Sri 9/21/2025, 10:59 AM	Modified By	Gollapalli Lakshmi Tulasi Jyothi Sri 9/22/2025, 8:38 AM

Edit

Delete

Clone

Email Template

Send Test and Verify Merge Fields

Subject

Congratulations! You are Selected

Plain Text Preview

Text Email Template: Selected ~ Salesforce - Developer Edition

Hello {Application\_\_c.Candidate\_Name\_\_c},  
Congratulations! You have been selected for the role of {Application\_\_c.Job\_Title\_\_c} at Pragati Solutions.  
We are excited about the possibility of working together.  
Please stay tuned for your interview schedule and onboarding details.  
Best Regards,  
HR Team

## 4 .Rejected

# Subject: Update on Your Job Application

Text Email Template

interviewDetailsTemplate

Preview your email template below.

Email Template Detail

Edit

Delete

Clone

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	✓
Email Template Name	interviewDetailsTemplate	Last Used Date	
Template Unique Name	interviewDetailsTemplate	Times Used	
Encoding	Unicode (UTF-8)		
Author	Gollapalli Lakshmi Tulasi Jyothi Sri <a href="#">[Change]</a>		
Description			
Created By	Gollapalli Lakshmi Tulasi Jyothi Sri 9/22/2025, 8:19 AM	Modified By	Gollapalli Lakshmi Tulasi Jyothi Sri 9/22/2025, 8:19 AM

Edit

Delete

Clone

Email Template

Send Test and Verify Merge Fields

Subject

Interview Schedule for Your Application

Plain Text Preview

Hello {Application\_\_c.Candidate\_Name\_\_c},  
Congratulations! You have been selected for the next stage of the hiring process.  
Here are your interview details:  
{Application\_\_c.interview\_Details\_\_c}  
Please be on time and prepare accordingly.  
If you have any questions, reply to this email.  
Best Regards,  
HR Team

## 5. Interview Details (new one)

# Subject: Interview Schedule for Your Application

Text Email Template

nterviewDetailsTemplate

review your email template below.

Email Template Detail

EditDeleteClone

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	✓
Email Template Name	InterviewDetailsTemplate	Last Used Date	
Template Unique Name	InterviewDetailsTemplate	Times Used	
Encoding	Unicode (UTF-8)		
Author	Gollapalli Lakshmi Tulasi Jyothi Sri (Change)		
Description			
Created By	Gollapalli Lakshmi Tulasi Jyothi Sri, 9/22/2025, 8:19 AM	Modified By	Gollapalli Lakshmi Tulasi Jyothi Sri, 9/22/2025, 8:19 AM

EditDeleteClone

Email Template

Send Test and Verify Merge Fields

Subject

Interview Schedule for Your Application

Plain Text Preview

Hello {Application\_\_c.Candidate\_Name\_\_c}.  
Congratulations! You have been selected for the next stage of the hiring process.  
Here are your interview details:  
{Application\_\_c.Interview\_Details\_\_c}  
Please be on time and prepare accordingly.  
If you have any questions, reply to this email.  
Best Regards,  
HR Team

## 3. Email Alerts

- Setup → Email Alerts → New.
- Object = Application.
- Recipient Type = Email Field → Candidate\_Email\_\_c.
- Link the correct Email Template (e.g., Under Review Template).
- Create 4 alerts (Under Review, Shortlisted, Selected, Rejected,Interview Details).

### 1.Under Review Email Alert

SETUP

Email Alerts

Email Alert

Under Review Email

Rules Using This Email Alert (0) | Approval Processes Using This Email Alert (0) | Entitlement Processes Using This Email Alert (0)

Email Alert Detail

EditDeleteClone

Description	Under Review Email	Email Template	Under Review
Unique Name	Under_Review_Email	Object	Application
From Email Address	Current User's email address		
Recipients	Email Field: Candidate Email		
Additional Emails			
Created By	Gollapalli Lakshmi Tulasi Jyothi Sri, 9/21/2025, 11:03 AM	Modified By	Gollapalli Lakshmi Tulasi Jyothi Sri, 9/21/2025, 11:03 AM

EditDeleteClone

Rules Using This Email Alert

Rules Using This Email Alert Help ?

This alert is currently not used by any rules

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help ?

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
Application_Response_Test	1, 2, 3, 7, 4, 5, 6, 8		011f000002nQJZ	✓

## 2.Shortlisted Email Alert

SETUP

Email Alerts

Email Alert

Shortlisted Email

Rules Using This Email Alert (0) | Approval Processes Using This Email Alert (0) | Entitlement Processes Using This Email Alert (0)

Email Alert Detail

EditDeleteClone

Description	Shortlisted Email	Email Template	Shortlisted
Unique Name	Shortlisted_Email	Object	Application
From Email Address	Current User's email address		
Recipients	Email Field: Candidate Email		
Additional Emails			
Created By	Gollapalli Lakshmi Tulasi Jyothi Sri, 9/21/2025, 11:04 AM	Modified By	Gollapalli Lakshmi Tulasi Jyothi Sri, 9/21/2025, 11:04 AM

EditDeleteClone

Rules Using This Email Alert

Rules Using This Email Alert Help ?

This alert is currently not used by any rules

Email Alert : Shortlisted Email ~ Salesforce - Developer Edition

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help ?

This alert is currently not used by any approval processes


Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
Application_Response_Test	2, 3, 7, 4, 5, 6, 8		011f000002nQJZ	✓

## 3.Selected Alert

 **Classic Email Templates**

Text Email Template

Rejected

Preview your email template below.

Email Template Detail

Email Templates from Salesforce

Unfiled Public Classic Email Templates

Email Template Name

Rejected

Available For Use

✓

Template Unique Name

Rejected

Last Used Date

Encoding

Unicode (UTF-8)

Times Used

Author

Gollapalli Lakshmi Tulasi Jyothi Sri

(Change)

Description

Created By

Gollapalli Lakshmi Tulasi Jyothi Sri

9/21/2025, 11:01 AM

Modified By

Gollapalli Lakshmi Tulasi Jyothi Sri

9/22/2025, 8:39 AM

Edit

Delete

Clone

Email Template

Send Test and Verify Merge Fields

Subject

Update: Your Application Status

Plain Text Preview

Hello {Application\_\_c.Candidate\_Name\_\_c},

Thank you for applying for the role of {Application\_\_c.Job\_Title\_\_c} at Pragati Solutions.


After careful consideration, we regret to inform you that your application will not be moving forward.

We appreciate the time you invested in applying and wish you success in your future endeavors.

Best Regards,

HR Team

## 4.Rejected Alert

 **Classic Email Templates**

Text Email Template

Rejected

Preview your email template below.

Email Template Detail

Email Templates from Salesforce

Unfiled Public Classic Email Templates

Email Template Name

Rejected

Available For Use

✓

Template Unique Name

Rejected

Last Used Date

Encoding

Unicode (UTF-8)

Times Used

Author

Gollapalli Lakshmi Tulasi Jyothi Sri

(Change)

Description

Created By

Gollapalli Lakshmi Tulasi Jyothi Sri

9/21/2025, 11:01 AM

Modified By

Gollapalli Lakshmi Tulasi Jyothi Sri

9/22/2025, 8:39 AM

Edit

Delete

Clone

Email Template

Send Test and Verify Merge Fields

Subject

Update: Your Application Status

Plain Text Preview

Hello {Application\_\_c.Candidate\_Name\_\_c},

Thank you for applying for the role of {Application\_\_c.Job\_Title\_\_c} at Pragati Solutions.


After careful consideration, we regret to inform you that your application will not be moving forward.

We appreciate the time you invested in applying and wish you success in your future endeavors.

Best Regards,

HR Team


## 5.Interview Details Alert


**SETUP**  
**Email Alerts**

Email Alert

Send Interview Details

[Rules Using This Email Alert \(0\)](#) | 
 [Approval Processes Using This Email Alert \(0\)](#) | 
 [Entitlement Processes Using This Email Alert \(0\)](#)


[Help for this Page](#)

Email Alert Detail

Description

Send Interview Details

Unique Name

Send\_Interview\_Details

From Email Address

Current User's email address

Recipients

Email Field: Candidate Email

Additional Emails

Created By

Gollapalli Lakshmi Tulasi Jyothi Sri

9/22/2025, 8:21 AM

Modified By

Gollapalli Lakshmi Tulasi Jyothi Sri

9/22/2025, 8:21 AM

Edit

Delete

Clone

Email Template

InterviewDetailsTemplate

Object

Application

Edit

Delete

Clone

Rules Using This Email Alert

[Rules Using This Email Alert Help](#)

This alert is currently not used by any rules

Approval Processes Using This Email Alert

[Approval Processes Using This Email Alert Help](#)

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
Application_Response_Test	8		011f000002nQJZ	✓

## 4. Record-Triggered Flow (Application Response)

- Setup → Flows → New Flow → Record-Triggered.
- Object = Application.
- Trigger = When record is created or updated.
- Optimize for → Actions and Related Records.

### Decisions & Actions:

#### 1. Decision 1: Education Qualification

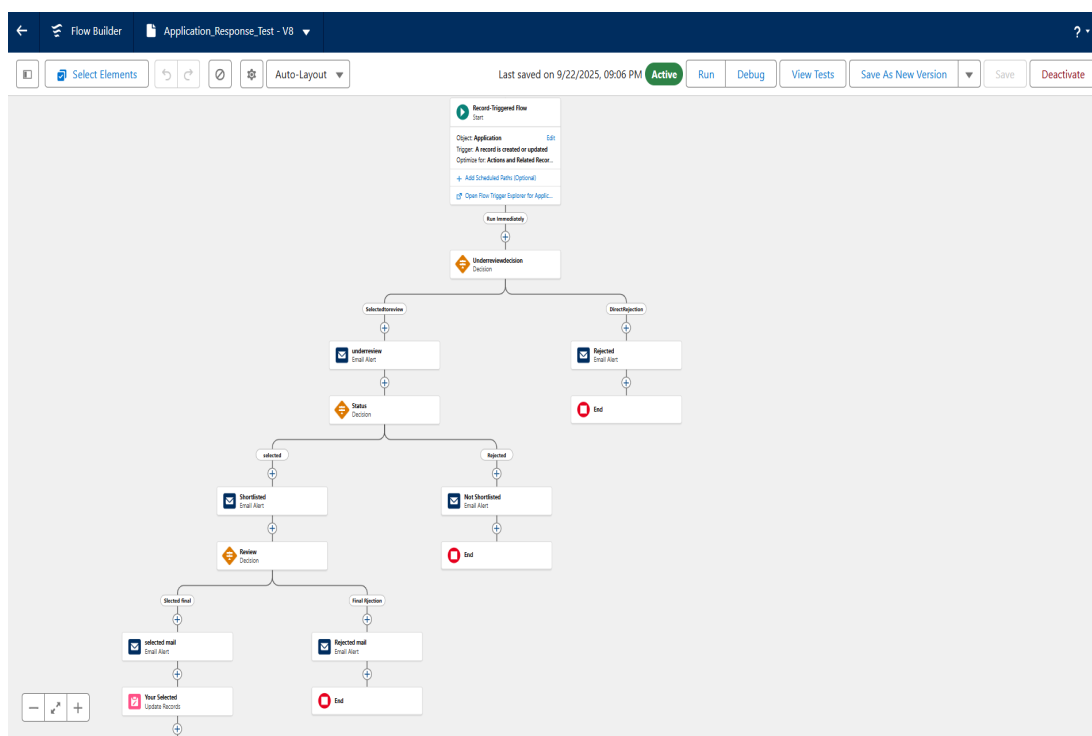
- If B.Tech or M.Tech → Status = Under Review → Send Under Review Email.
- Else → Status = Rejected → Send Rejected Email.

## 2. Decision 2: Experience Level

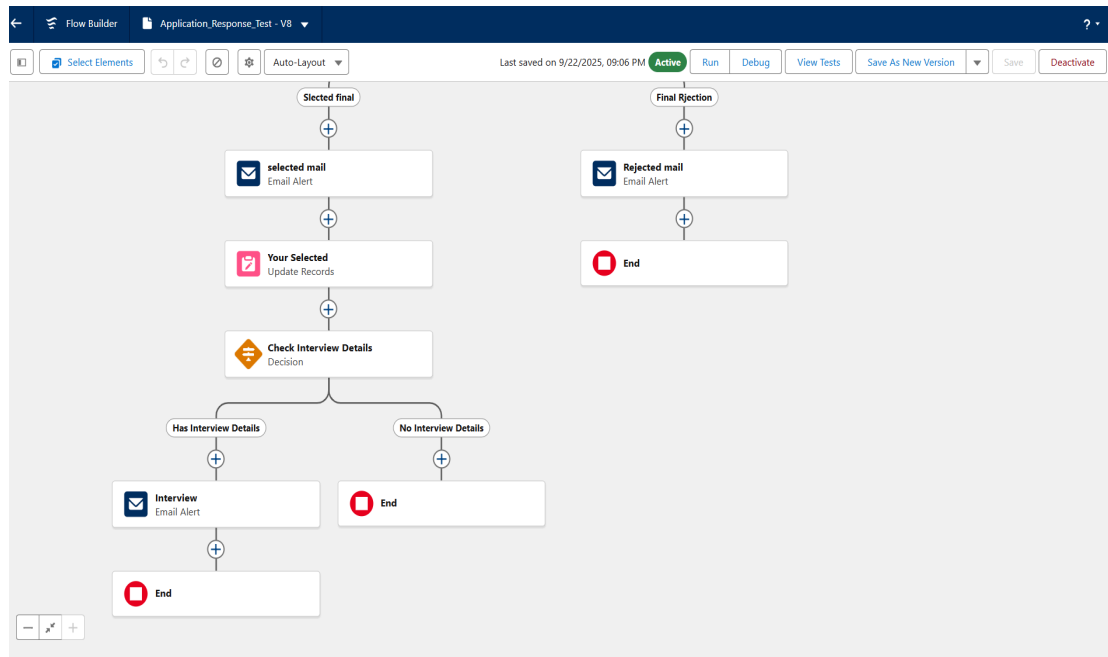
- If Mid or Senior  $\rightarrow$  Status = Shortlisted  $\rightarrow$  Send Shortlisted Email.
- Else  $\rightarrow$  Rejected  $\rightarrow$  Send Rejected Email.

### 3. Decision 3: Notice Period

- If Immediate OR 5 Days → Status = Selected → Send Selected Email.
- Else → Rejected → Send Rejected Email.
- Selected → Send Interview Details







## Why:

- To automate candidate status updates and reduce manual HR work.
- Candidates receive Under Review, Shortlisted, Selected, Rejected emails automatically based on conditions.

## Phase 4 Outcome

- Automated email communication.
- Candidates notified at every stage.
- HR workload reduced.