

# **RECRUITING ASSISTANT FOR HR MANAGERS**

## **1. INTRODUCTION:**

### **1.1 Overview:**

In this project, we use custom objects, relationships, page layouts to give the HR team easy access to data they need on an existing recruitment app. To make the existing app more efficient for the HR team we create custom objects and relationships to store and access the data more efficiently. We install an unmanaged package in the org to get metadata that acts as existing data in the recruitment app.

This Human Resources (HR) Assistant job description template is optimized for posting on online job boards or careers pages. As a sample description, it's easy to customize for your company's specific needs - add or delete any skills or duties and responsibilities you'd like. A human resources (HR) assistant is a certified professional who handles the daily administrative and HR duties of an organization. They assist HR managers with recruitment, record maintenance, and payroll processing, and provide clerical support to all employees.

We are looking to employ an HR assistant with outstanding administrative and communication skills. An HR assistant is expected to be a conceptual thinker with superb organizational and time management skills. You must be reliable and should accurately follow instructions with the ability to multitask and acclimatize to a fast-paced environment.

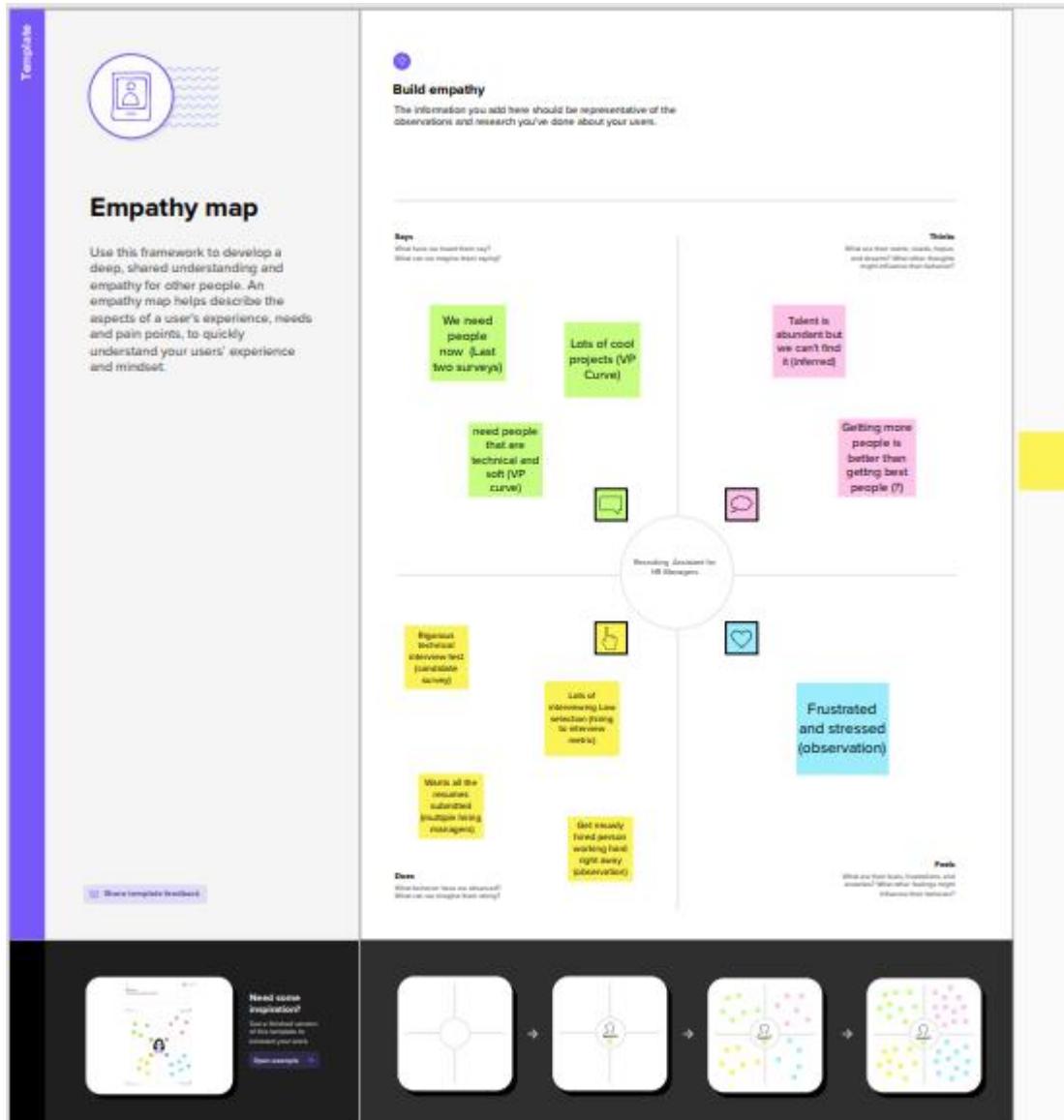
### **1.2 Purpose :**

- Support all internal and external HR-related inquiries or requests.
- Maintain digital and electronic records of employees.
- Serve as point of contact with benefit vendors and administrators.
- Assist with the recruitment process by identifying candidates, performing reference checks, and issuing employment contracts.
- Maintain calendars of the HR management team.
- Oversee the completion of compensation and benefit documentation.
- Assist with performance management procedures.
- Schedule meetings, interviews, HR events and maintain agendas.

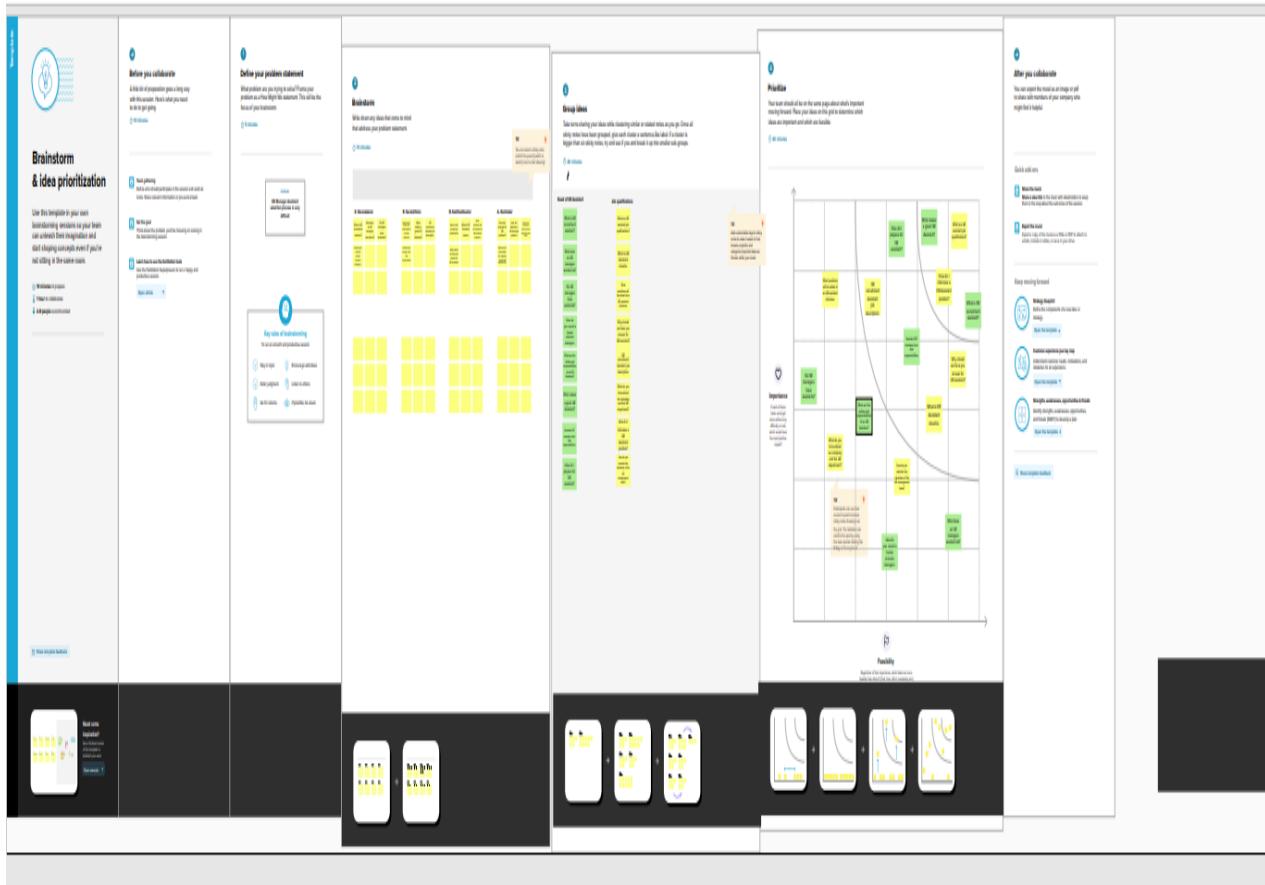
- Produce and submit reports on general HR activity.
- Complete termination paperwork and exit interviews.

## 2. Problem Definition & Design Thinking:

### 2.1 Empathy Map:



## 2.2 Ideation & Brainstorming Map :



## 3. RESULT:

### 3.1 Data Model:

Object Name	Fields in the Object	
Job Posting Site	Field Label	Data Type
	Status	Master-Detail
	Technical Site	Text
	Job Posting Site URL	URL

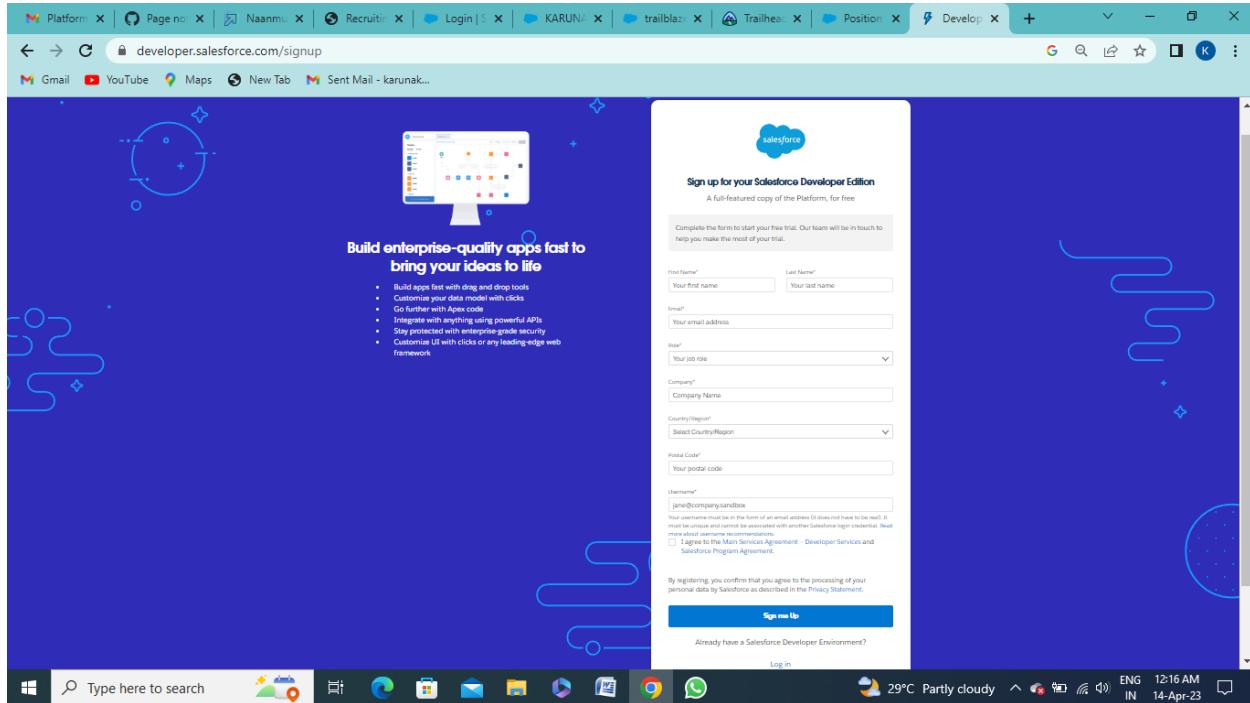
Review	<table border="1"> <thead> <tr> <th>Field Label</th><th>Data Type</th></tr> </thead> <tbody> <tr> <td>Job Posting Site</td><td>Master-Detail</td></tr> <tr> <td>Review Number</td><td>Auto Number</td></tr> </tbody> </table>	Field Label	Data Type	Job Posting Site	Master-Detail	Review Number	Auto Number								
Field Label	Data Type														
Job Posting Site	Master-Detail														
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Job Posting	<table border="1"> <thead> <tr> <th>Field Label</th><th>Data Type</th></tr> </thead> <tbody> <tr> <td>Job Posting Site</td><td>Master-Detail</td></tr> <tr> <td>Job posting Number</td><td>Auto Number</td></tr> <tr> <td>Status</td><td>Master-Detail</td></tr> <tr> <td>Technical Site</td><td>Text</td></tr> <tr> <td>Position</td><td>Master-Detail</td></tr> </tbody> </table>	Field Label	Data Type	Job Posting Site	Master-Detail	Job posting Number	Auto Number	Status	Master-Detail	Technical Site	Text	Position	Master-Detail		
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Position	<table border="1"> <thead> <tr> <th>Field Label</th><th>Data Type</th></tr> </thead> <tbody> <tr> <td>Job Posting Site</td><td>Text Area</td></tr> <tr> <td>Job Posting Site URL</td><td>URL</td></tr> <tr> <td>Status</td><td>Pick list</td></tr> <tr> <td>Title</td><td>Text</td></tr> <tr> <td>Education</td><td>Long Text Area</td></tr> <tr> <td>Location</td><td>Pick list</td></tr> </tbody> </table>	Field Label	Data Type	Job Posting Site	Text Area	Job Posting Site URL	URL	Status	Pick list	Title	Text	Education	Long Text Area	Location	Pick list
Field Label	Data Type														
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Job Posting Site URL	URL														
Status	Pick list														
Title	Text														
Education	Long Text Area														
Location	Pick list														

## 3.2 Activity & Screenshot

### 1. Creation of developer account:

Create your Sales force Developer Org to get Started.

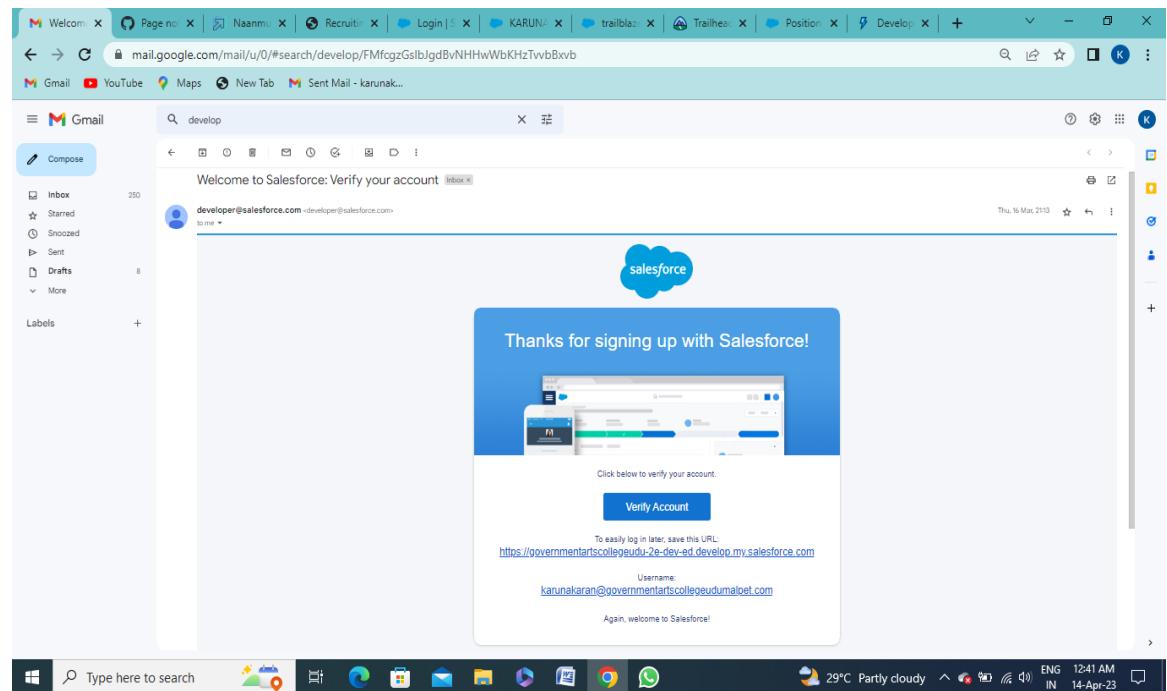
#### 1. Search Developer.salesforce.com



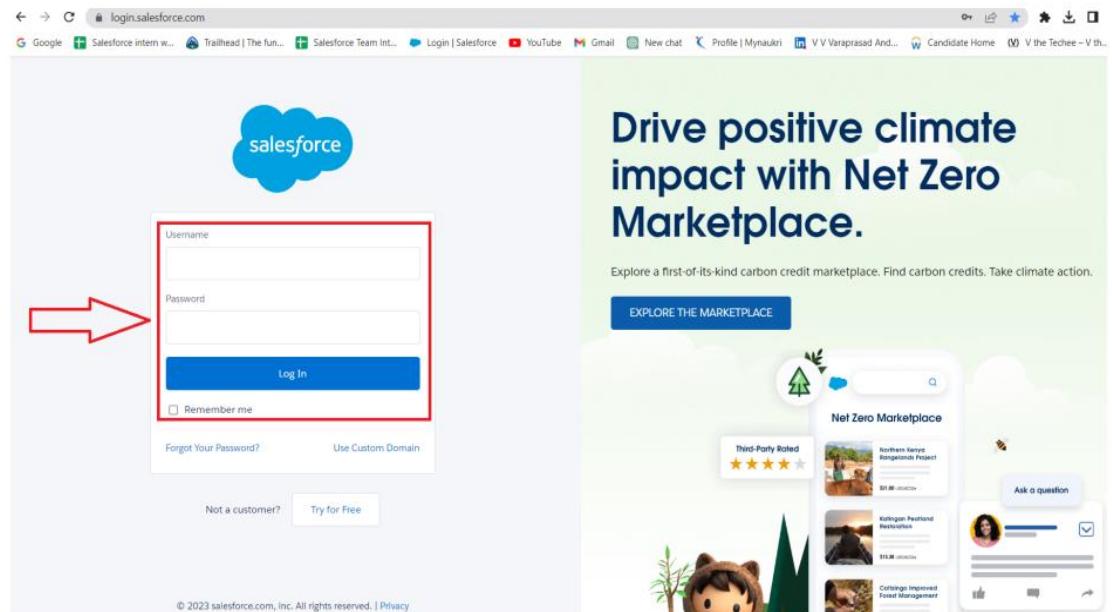
#### 2. Enter the following details

- First name & Last name
- Email
- Role : Developer
- Company : College Name
- County : India
- Postal Code: Pin Code
- Username: should be a combination of your name and company  
This need not be an actual email id, you can give anything in the format:  
[username@organization.com](mailto:username@organization.com)

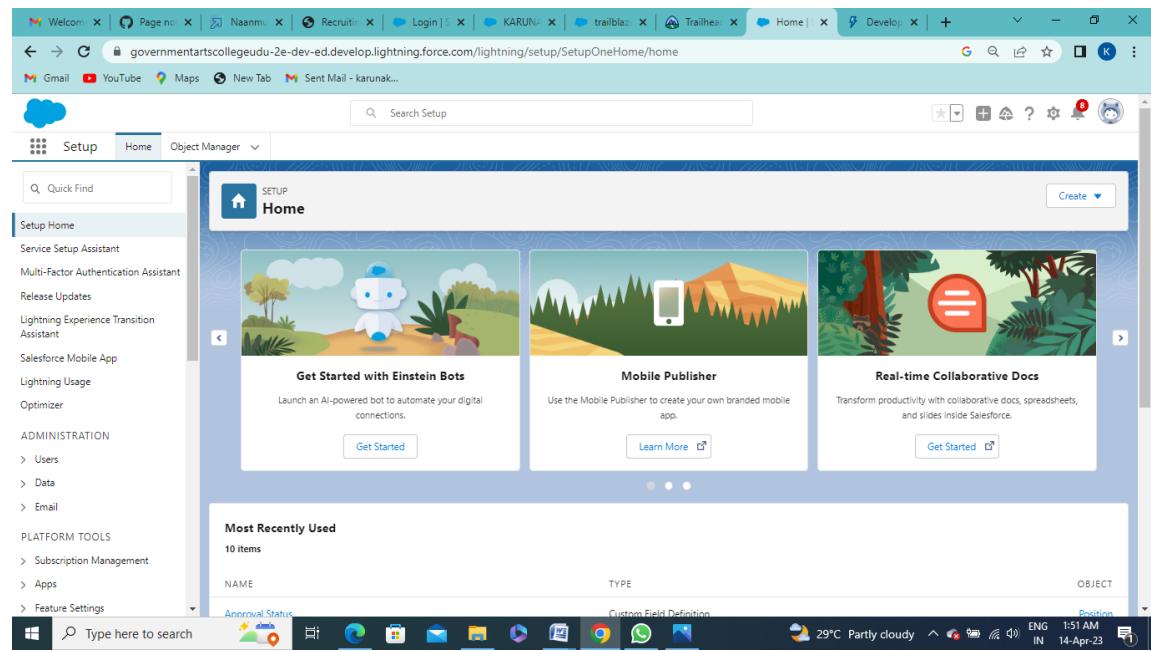
#### 3. Click sign me up, After a few min you will reserve a mail salesforce org and by using the verify account link you can create your new password.



4. Click save.
5. Search login.salesforce.com
6. By using username and password you can into the sales force org.



7. The setup page will appear as below.



Create a developer org and login with your login credentials.

## 2. Package Installation:

### Package installation for Recruiting App:

In Sales force, a package is a collection of Apex classes, triggers, Visual force pages, and other components that can be installed into an organization. There are two types of packages: managed and unmanaged. Managed packages are developed and distributed by ISVs (Independent Software Vendors) and can be installed from the Sales force App Exchange, while unmanaged packages are created and distributed by Sales force administrators within an organization. To install a package, an administrator can navigate to the App Exchange, find the desired package, and click the "Install" button. The administrator will then be prompted to log in to their Sales force organization and provide permission to install the package.

Click to launch the App Launcher, then click Playground Starter and follow the steps

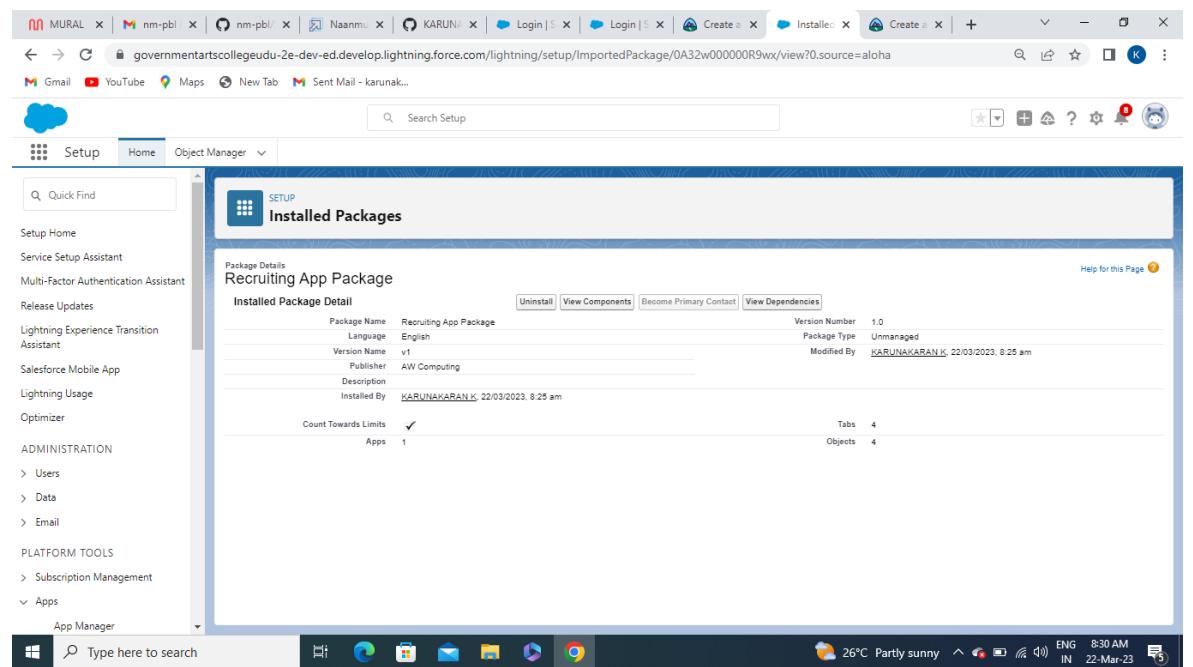
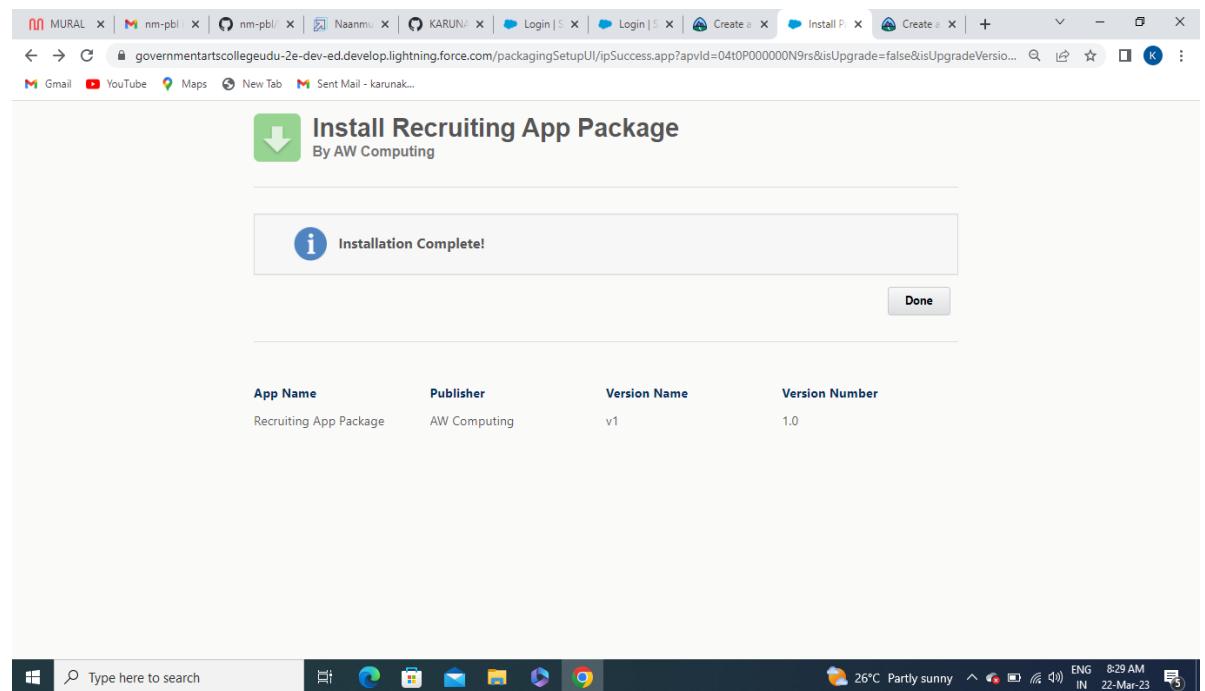
1. Click the install a package tab.
2. Paste 04tOP00000N9rs into the field.
3. Click install
4. Select install for admins only.

The screenshot shows a web browser window with the URL [trailhead.salesforce.com/content/learn/projects/build-a-data-model-for-a-recruiting-app/create-a-custom-object-for-reviews](https://trailhead.salesforce.com/content/learn/projects/build-a-data-model-for-a-recruiting-app/create-a-custom-object-for-reviews). The page is titled "Create a Custom Object for Reviews". It features a "Verify Step" section with a green button labeled "Verify step to earn 100 points". To the right, there's a sidebar with "Topics" like "Learning Objectives", "Introduction", and "Create a Review Custom Object". Below the sidebar are buttons for "Challenge" (+100 points) and "Get help with this project". At the bottom, there's a Windows taskbar showing various pinned apps and system status.

Click to launch and then install a Recruiting App.

The screenshot shows a "Install Recruiting App Package" dialog box from AW Computing. It includes a warning about component name conflicts with three options: "Do not install.", "Rename conflicting components in package.", and "Install for Admins Only" (selected). Other options are "Install for All Users" and "Install for Specific Profiles...". At the bottom, there are "Install" and "Cancel" buttons, and a summary table with details: App Name (Recruiting App Package), Publisher (AW Computing), Version Name (v1), and Version Number (1.0).

App Name	Publisher	Version Name	Version Number
Recruiting App Package	AW Computing	v1	1.0



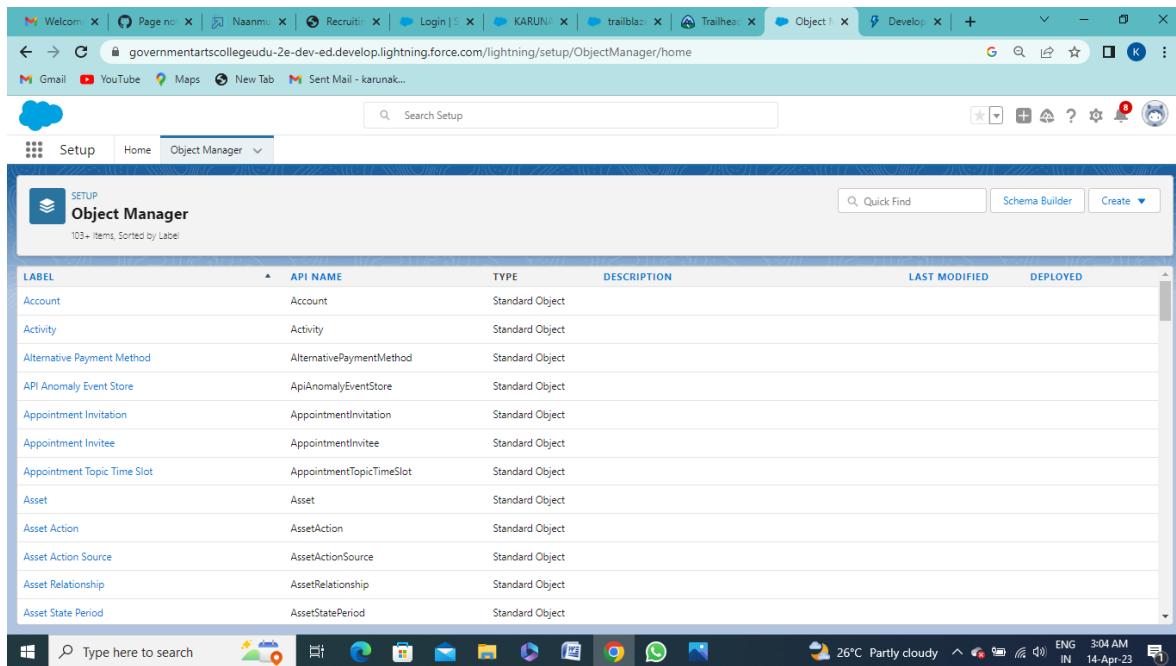
### 3. Object:

#### Activity – 1

##### Create a custom object for Job Posting Sites:

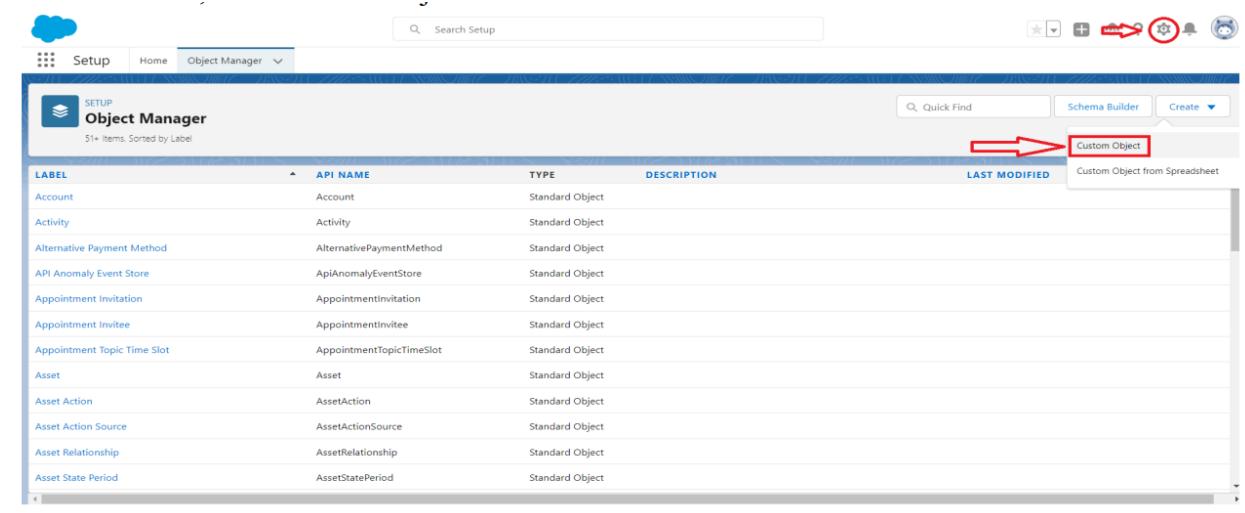
To create a custom object, follow these steps:

1. From setup click on object manager.



The screenshot shows the Salesforce Object Manager page. At the top, there's a navigation bar with tabs for Setup, Home, and Object Manager. Below the navigation is a search bar labeled "Search Setup". On the right side of the header are buttons for "Quick Find", "Schema Builder", and "Create". The main content area is titled "Object Manager" and displays a table of objects. The columns are labeled: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists various standard objects like Account, Activity, Alternative Payment Method, etc. A tooltip "103+ Items, Sorted by Label" is visible above the table. At the bottom of the page, there's a search bar with placeholder text "Type here to search", a toolbar with various icons, and a system status bar showing "26°C Partly cloudy", "ENG IN 14 Apr 23", and a battery icon.

2. Click create, select custom object.



This screenshot is similar to the previous one but focuses on the "Create" button. A red arrow points to the "Create" button, which has a red box around it. Next to the "Create" button is a tooltip "Custom Object from Spreadsheet". The rest of the page, including the table of objects, is identical to the first screenshot.

3. Fill in the label as "Job Posting Site".
4. Fill in the plural label as "Job Posting Sites".
5. Record name: "Site Name"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout Launch New Custom Tab Wizard after saving this custom object.

The screenshot shows the 'Custom Object Definition Edit' screen in Salesforce Setup. The 'Custom Object Information' section includes fields for 'Label' (Job posting site), 'Plural Label' (Job Posting Sites), and 'Object Name' (job\_posting). Other settings like 'Content Name' and 'Data Type' are also visible.

The screenshot shows the continuation of the 'Custom Object Definition Edit' screen. It includes sections for 'Optional Features' (Allow Reports, Track Field History selected), 'Deployment Status' (Deployed selected), 'Search Status' (Allow Search selected), and 'Object Creation Options' (Add Notes and Attachments related list to default page layout selected, Launch New Custom Tab Wizard after saving this custom object selected).

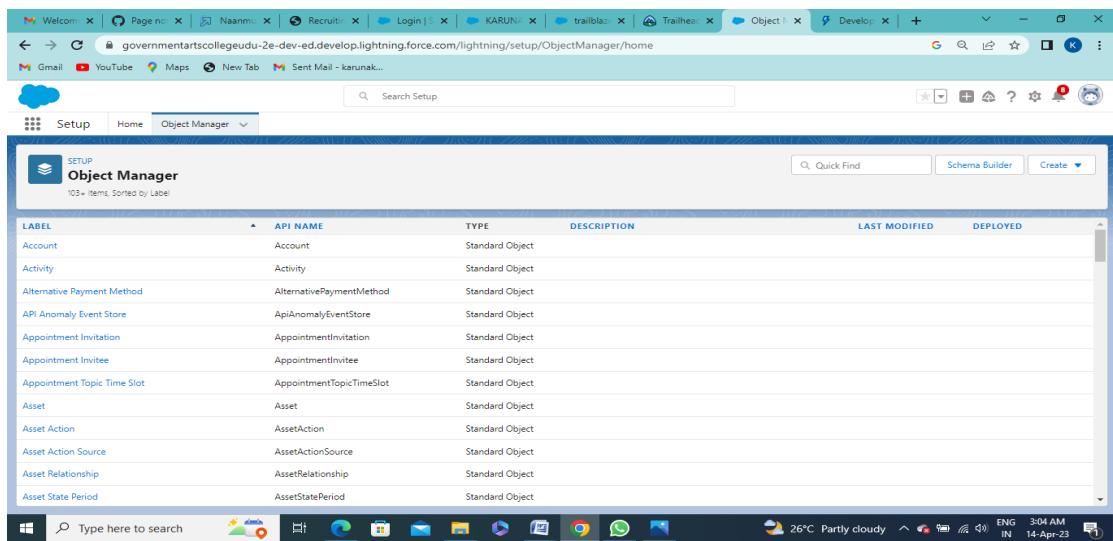
11. Leave everything else as is, and click Save.

## Activity -2

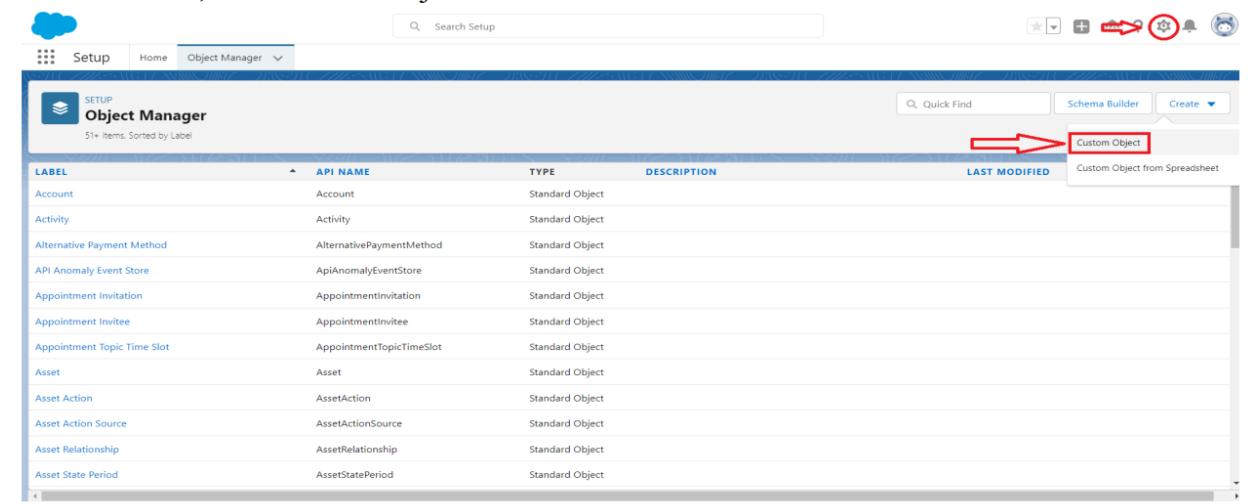
### Create a custom object for reviews:

To create a custom object, follow these steps:

1. From setup click on object manager.

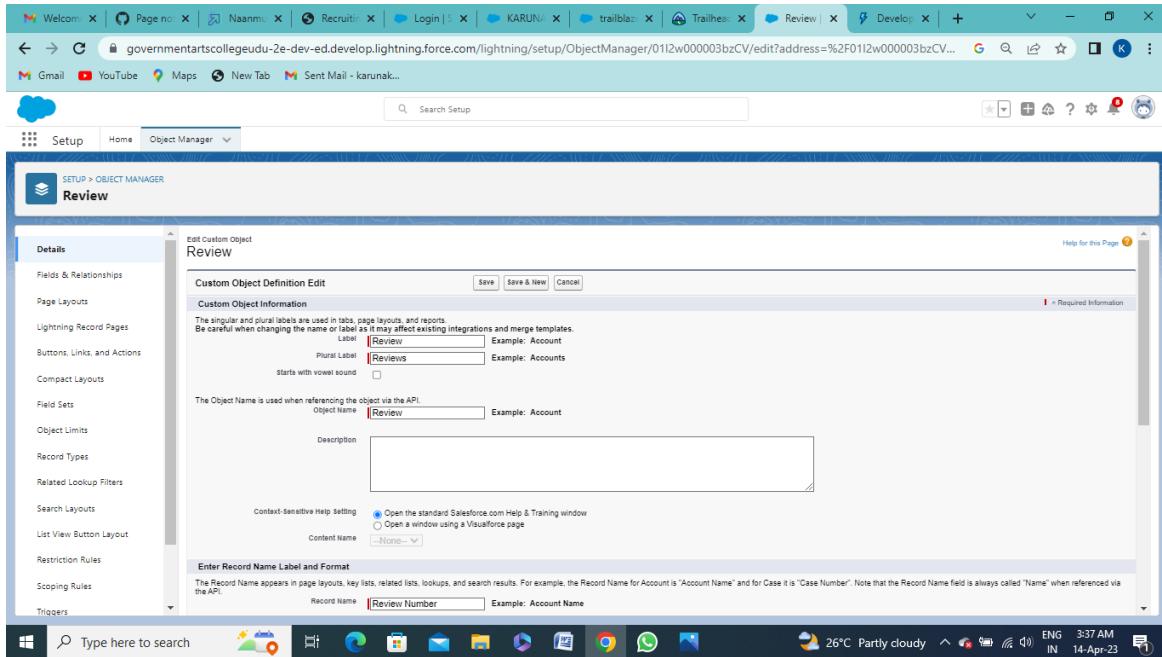


2. Click create, select custom object.

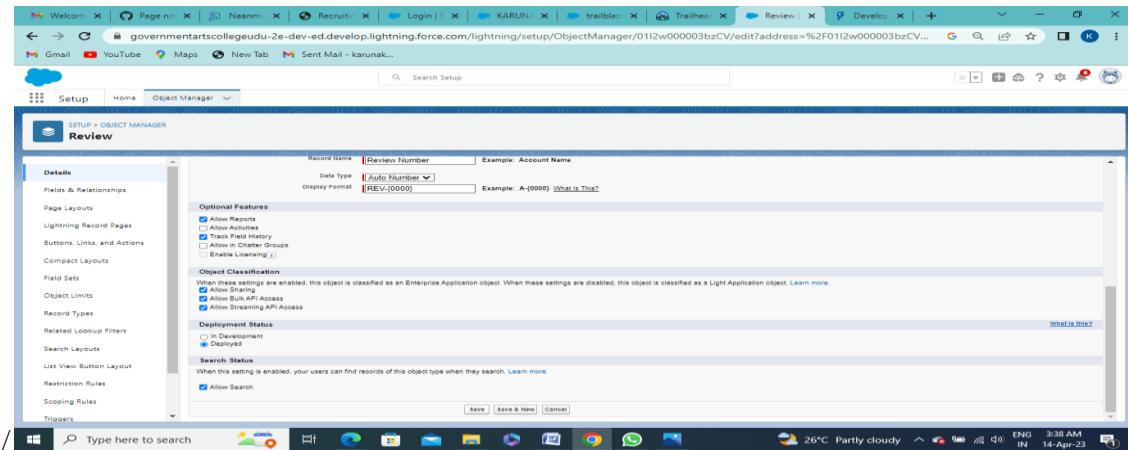


3. Fill in the label as "Review".

4. Fill in the plural label as "Reviews".



5. Record name: "Review Number"
6. Select the data type as "Auto Number".
7. Under display format enter "REV-{0000}".
8. Enter the 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.

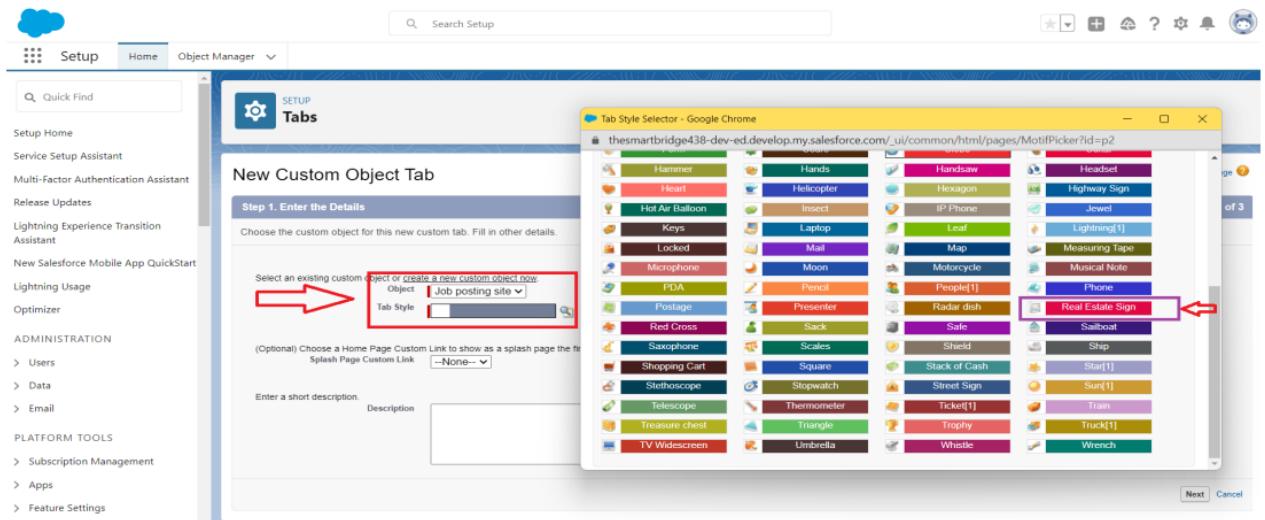
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

## 4. Tabs:

### Activity:

#### Creating a Tab:

1. To Select the Tab Style: Click the magnifying glass and select Real Estate



2. Click Next.
3. Leave the profile as is and click Next.
4. In the Add to Custom Apps section:
  5. Deselect Include Tab.
  6. Select Append tab to users' existing personal customizations.
  7. Click Save.

## 5. Fields:

### Activity – 1

#### Create New Field for Job Posting site

From the object manager, click on the job posting site, then click on Fields & Relationships.

1. Click on new.

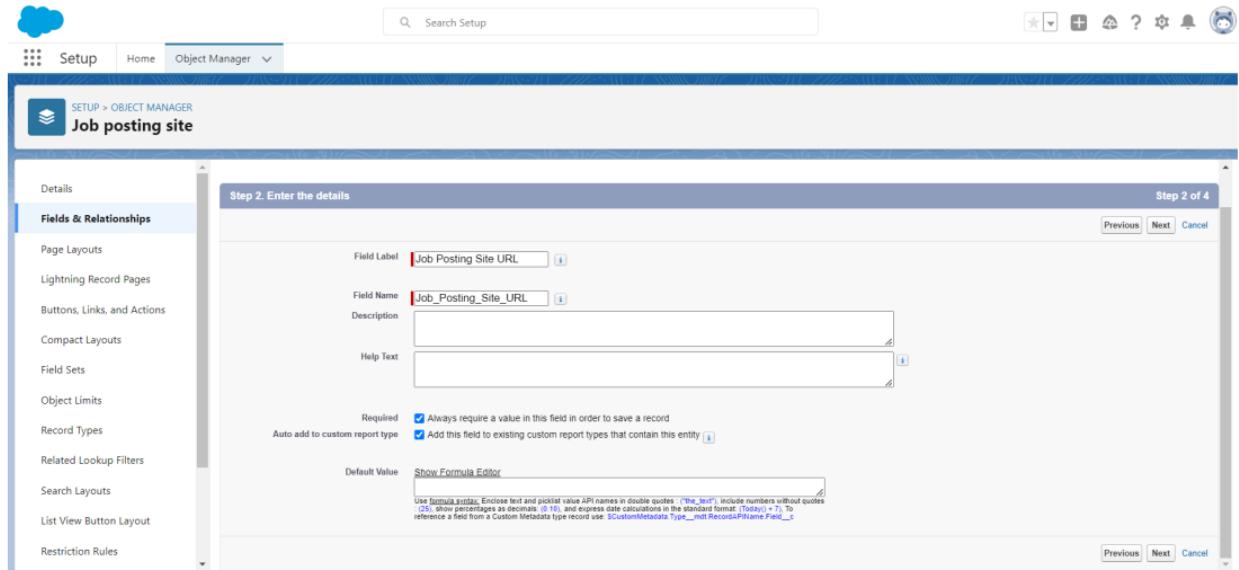
The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area displays the 'Job posting site' object details. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The central area is titled 'Fields & Relationships' and contains a table with four items. A red box highlights the 'New' button at the top right of the table. Another red box highlights the 'Fields & Relationships' link in the sidebar. A red arrow points from the 'Fields & Relationships' link to the 'Fields & Relationships' section in the main table.

2. Select the data type as URL.

The screenshot shows the 'Fields & Relationships' page for the 'Job posting site' object. The left sidebar shows 'Fields & Relationships' selected. The main area displays a list of field types with their descriptions. A red box highlights the 'URL' option in the list. A red arrow points from the 'URL' option to its detailed description below, which states: 'Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.'

**3. Click Next.**

**4. For Field Label, enter the Job Posting Site URL.**



**5. Click Next, Next, and click Save & New.**

## Create a Fields for Job Posting site

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Description	Description_c	URL(255)		
Job Posting Site URL	Job_Posting_Site_URL_c	URL(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Status	Status__c	Master-Detail(Position)		
Technical site	Name	Text(80)		

**1. Status**

**2. Technical site**

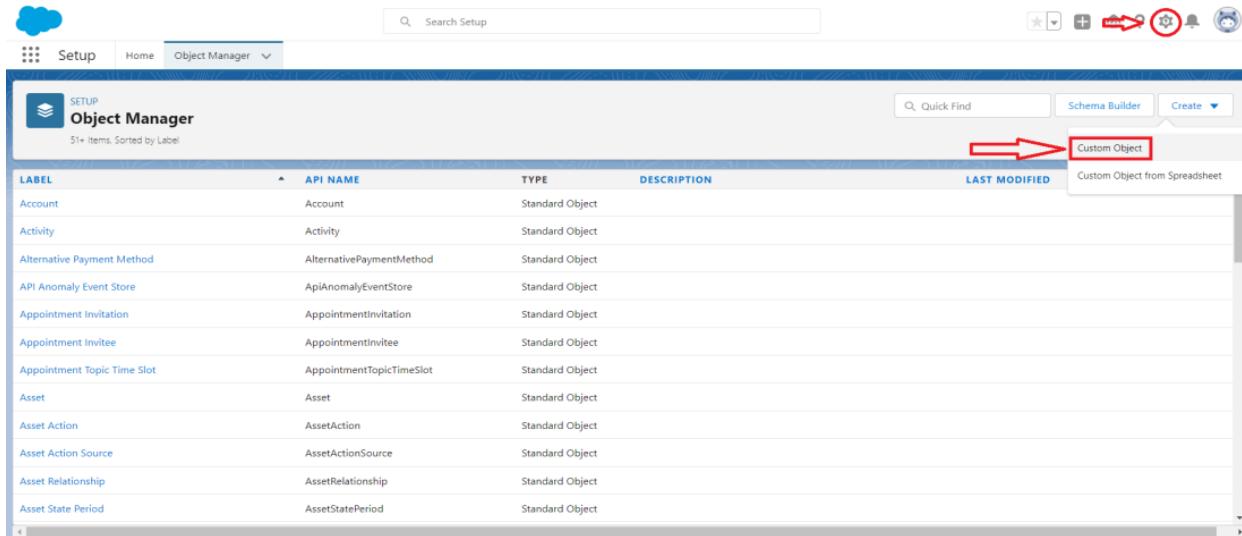
**3. Description**

## 6. Junction Object:

### Activity – 1

#### Creating a custom junction object :

1. From setup, click object Manager.
2. Click create, select custom object.



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below it is a search bar and a toolbar with various icons. On the left, there's a sidebar with a 'SETUP' icon and a 'Object Manager' section. The main area is titled 'Object Manager' and shows a list of standard objects like Account, Activity, and Asset. In the top right corner of the main area, there's a 'Create' button with a dropdown menu. The 'Custom Object' option in this menu is highlighted with a red arrow. The status bar at the bottom right says 'Custom Object from Spreadsheet'.

3. Enter the label as "Job posting".
4. Enter the plural label as "Job postings".
5. Enter the record name as "Job posting number".
6. select the data type as "Auto Number".
7. Enter the display format as "JOBPOST-{0000}"
8. Enter the Starting number as 1.

**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Job posting	Example: Account
Plural Label	Job postings	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	Job_posting	Example: Account
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Description

Context-Sensitive Help Setting

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name

Record Name

Record Name appears in page layouts, key lists, related lists, lookups, 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	Job posting Number	Example: Account Name
Data Type	Auto Number	
Display Format	JOBPOST-(0000)	Example: A-(000) <a href="#">What Is This?</a>
Starting Number	1	

**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

8. Leave everything else as is, and click save.

## Activity - 2

### Create a Relationships Object

**Creating a master-detail relationship between Job posting and job posting site.**

- From setup, click object manager.
- Select Job posting object, click on field and relationships, click new.

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the Job posting object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Job Posting Site	Job_Posting_Site__c	Master-Detail(Job Posting Site)		
JobpostingNumber	Name	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Position	Position__c	Master-Detail(Position)		
Review	Review__c	Lookup(Review)		
Status	Status__c	Lookup(Review)		
Technical site	Technical_site__c	Lookup(Review)		

- Select the data type as Master-detail relationship.
- Click Next, relate to the Job posting site.
- Enter the label Job Posting site.
- Click next, next, next and save.

The screenshot shows the Salesforce Object Manager Custom Field Definition Detail page for the Job Posting Site field. The left sidebar lists various setup options. The main area shows the custom field definition:

**Custom Field Definition Detail**

Field Label: Job Posting Site	Field Name: Job_Posting_Site	Object Name: Job_posting
API Name: Job_Posting_Site__c	Description:	Data Type: Master-Detail
Help Text:	Created By: KARUNAKARAN_K	Modified By: KARUNAKARAN_K
Display Type: Field Usage	Created Date: 29/03/2023, 10:34 pm	Modified Date: 29/03/2023, 10:34 pm
Data Sensitivity Level:	Child Relationship Name: Job_postings	
Compliance Categorization:	Sharing Setting: Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.	
Related Lookup Filters:	Reparentable Master Detail: [checkbox]	
Restriction Rules:	Master-Detail Options:	
Scoping Rules:	Related To: Job_Posting_Site	Related List Label: Job postings

# Creating a master-detail relationship between job posting and position.

1. From setup, click object manager.
2. Select Job posting object, click on field and relationships, click new.

The screenshot shows the Salesforce Object Manager interface. The left sidebar is collapsed, and the main area displays the 'Fields & Relationships' section for the 'Job posting' object. The table lists eight fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Job Posting Site	Job_Posting_Site__c	Master-Detail(Job Posting Site)		
JobpostingNumber	Name	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Position	Position__c	Master-Detail(Position)		
Review	Review__c	Lookup(Review)		
Status	Status__c	Lookup(Review)		
Technical site	Technical_site__c	Lookup(Review)		

3. Select the data type as Master-detail relationship.
4. Click Next, relate to position.
5. Enter the label Position.
6. Click next, next, next and save.

The screenshot shows the 'Job posting' object's custom field configuration screen. A new custom field named 'Position' has been created. The 'Field Information' section includes:

- Field Label: Position
- Field Name: Position
- API Name: Position\_\_c
- Description: Hr
- Type: Text
- Data Owner: Field Owner
- Data Sensitivity Level: Low
- Compliance Categorization: Not Specified
- Created By: KARUNAKARAN K (29/03/2023, 10:38 pm)
- Modified By: KARUNAKARAN K (29/03/2023, 10:38 pm)

The 'Master-Detail Options' section includes:

- Related To: Job posting
- Related List Label: Job postings
- Sharing Setting: Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
- Child Relationship Name: Job\_postings

## 7. Page Layout:

### Activity-1

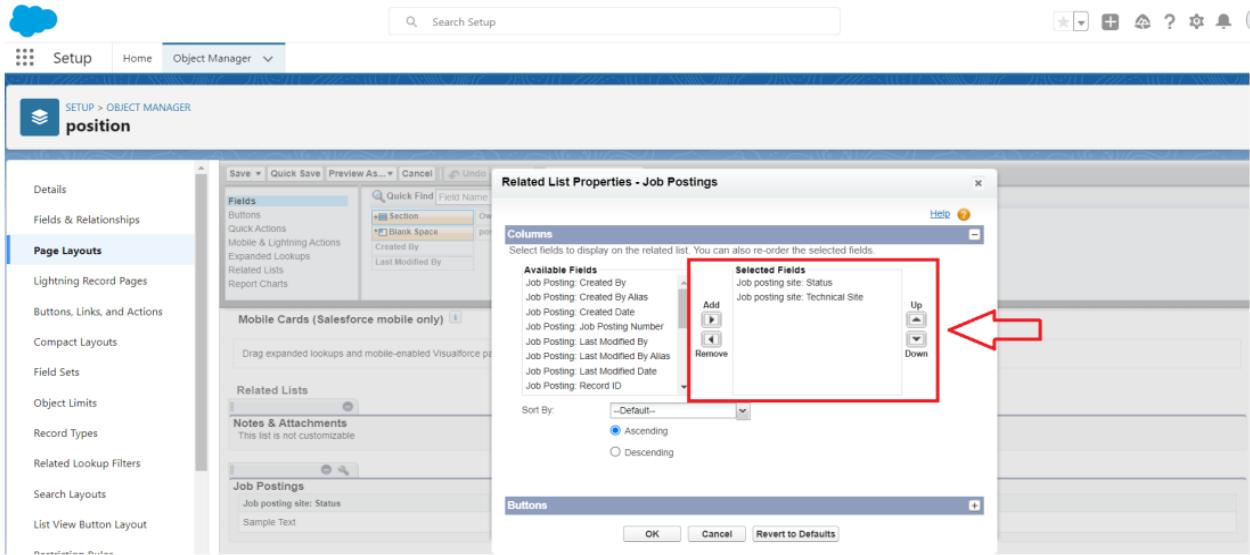
#### Modifying the page layouts:

1. From setup, click on object manager.
2. Click position, then page layouts.

The screenshot shows the Salesforce Object Manager interface for the 'position' object. The left sidebar lists various configuration options, with 'Page Layouts' highlighted by a red box and a red arrow pointing to it. The main content area displays a table titled 'Page Layouts' with one item. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The single row shows 'position Layout' created by 'Veera Venkata Varaprasad Androthu' on '1/23/2023, 10:50 PM' and last modified by the same user on '1/24/2023, 1:05 AM'. A second red box highlights the modification timestamp, and a second red arrow points to it.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
position Layout	Veera Venkata Varaprasad Androthu, 1/23/2023, 10:50 PM	Veera Venkata Varaprasad Androthu, 1/24/2023, 1:05 AM

3. Click down array next to the position layout and select edit.
4. Scroll down to the job posting related list, and click the wrench icon in the header to edit it.
5. From the available fields section, select
  - Job posting site : Status
  - Job posting site : Technical Site
6. Click add.
7. From the selected fields section, select job posting : Job posting number and click remove.



8. Click ok, then save.

## Activity – 2

### Create a Page layout for Review Object

1. From setup, click on object manager.
2. Click Review, then page layouts.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Review Layout	KARUNAKARAK K, 23/03/2023, 10:13 pm	KARUNAKARAK K, 29/03/2023, 11:33 pm

3. Click down array next to the “review” layout and select edit.

4. Scroll down to the job posting related list, and click the wrench icon in the header to edit it.

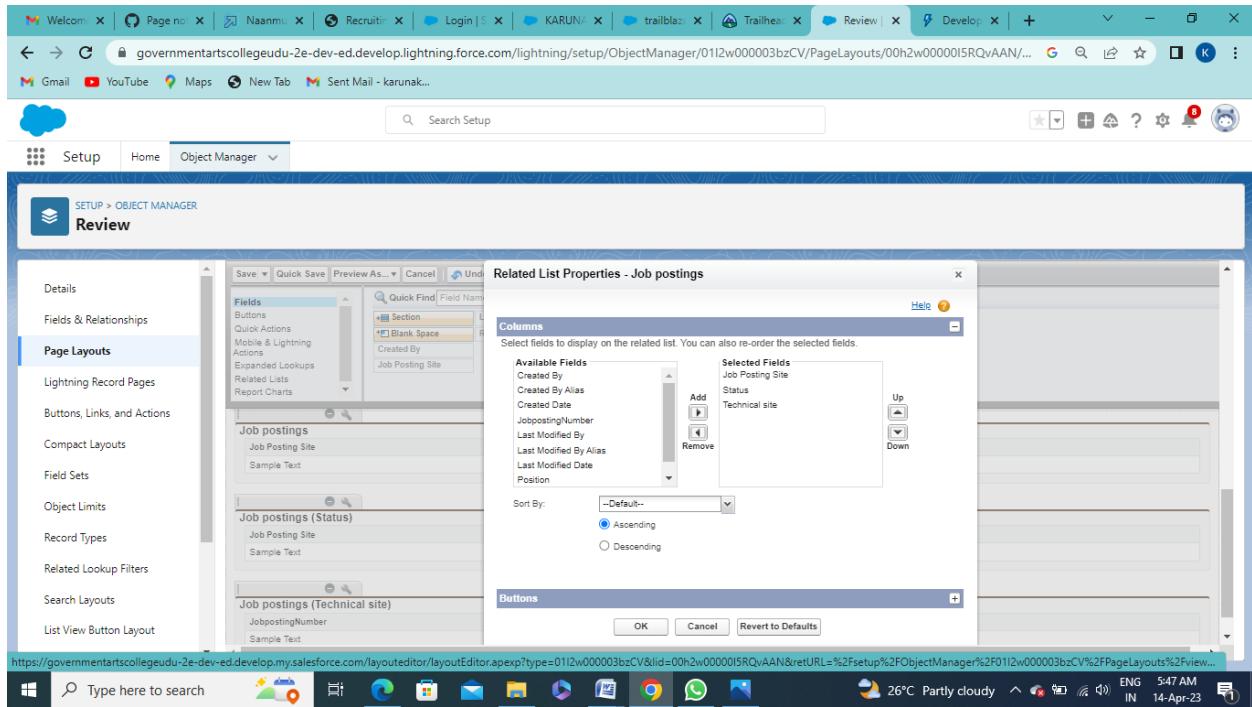
5. From the available fields section, select

Job posting site : Status

Job posting site : Technical Site

6. Click add.

7. From the selected fields section, select job posting : Job posting number and click remove.



8. Click ok, then save.

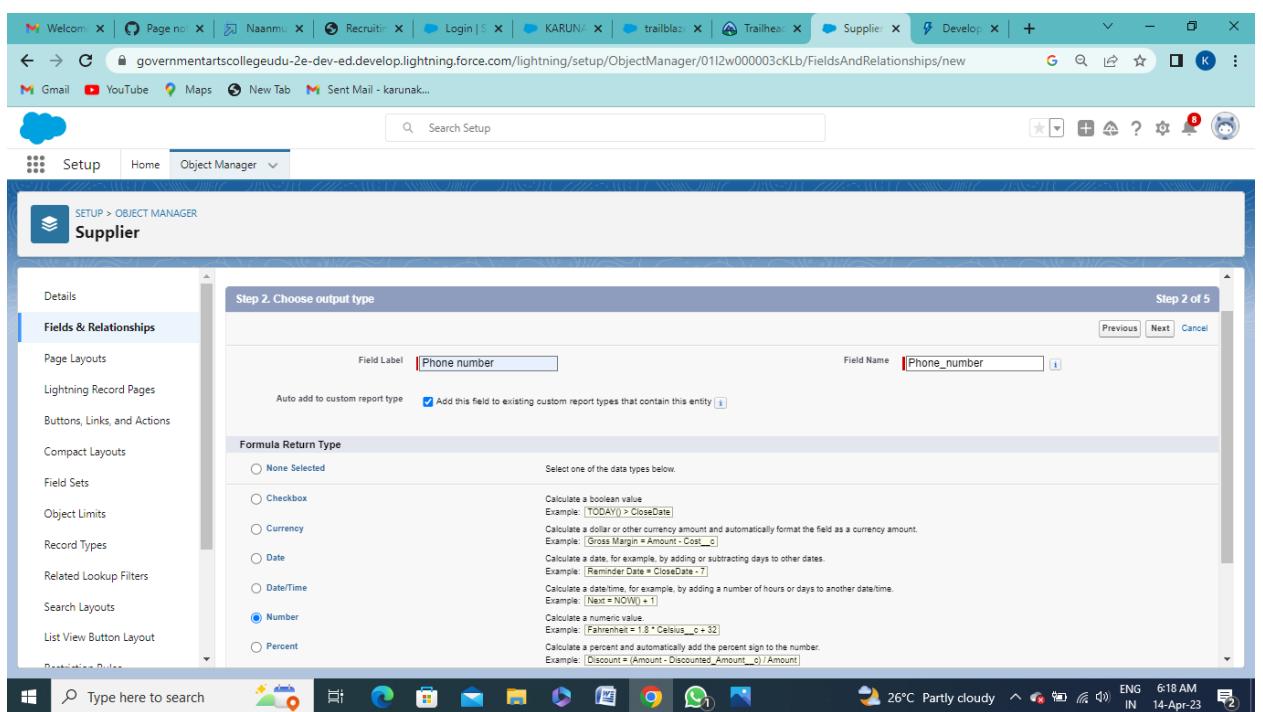
## 8. Validation Rules:

### Activity – 1

#### Creating a Validation Rule:

## To create a validation rule:

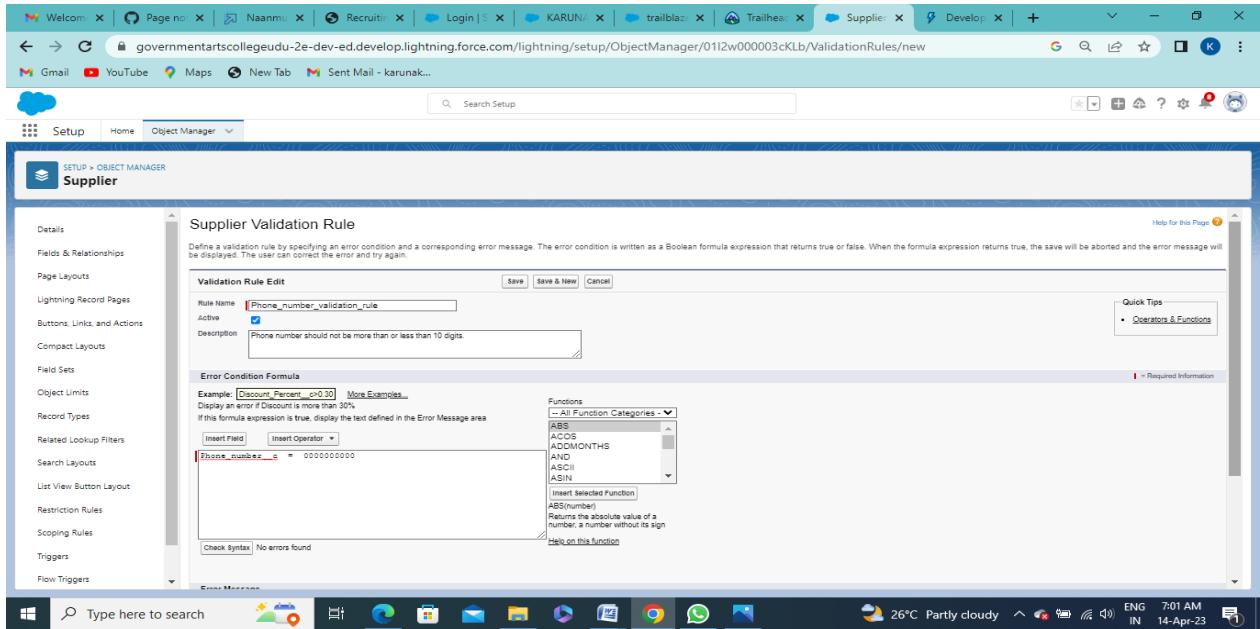
- Go to object manager and Select the object on which ( For example: Supplier) validation rule has to be implemented, scroll down and click validation rule, New.
- Then click on fields & relationships and click on New.
- New Custom field on data type is formula then next.
- Field label: Phone number
- Formula Return Type : Number
- Then next and click on save.



Give details as:

1. Rule name: Phone number validation rule.
2. Active: checked
3. Description: phone number should not be more than or less than 10 digits.
4. Under Error Condition Formula: write the condition using insert field, insert operator, insert function

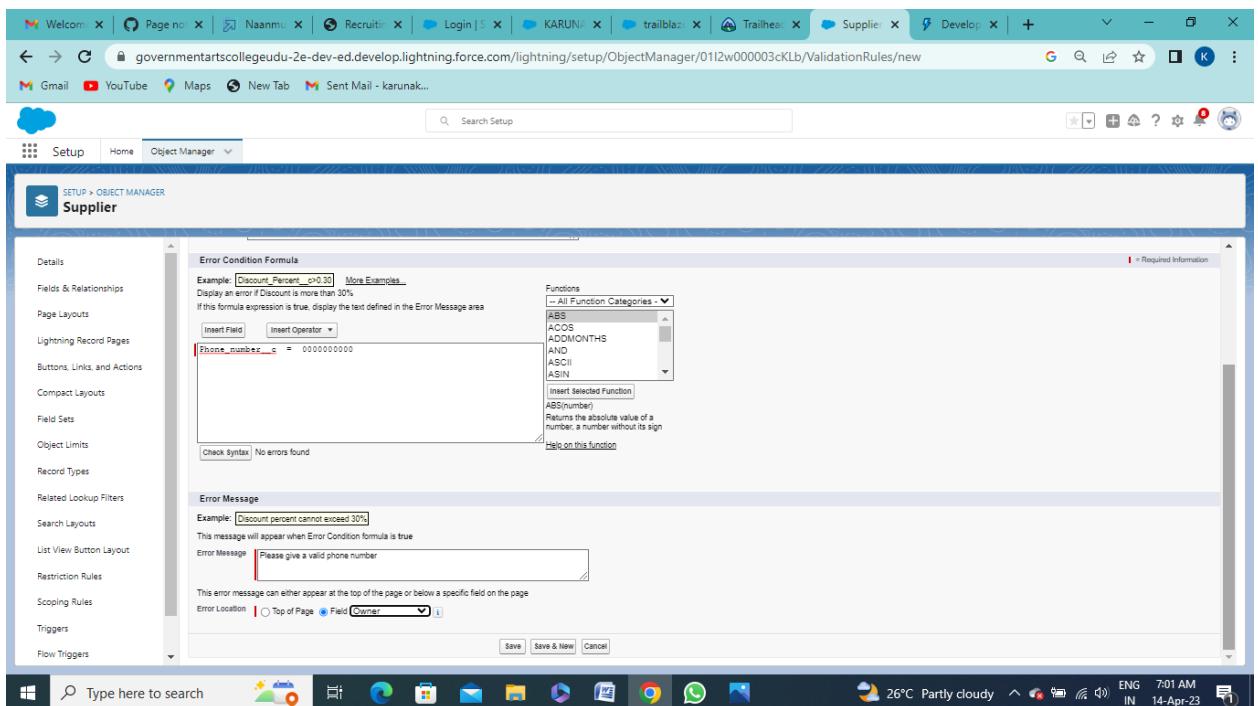
## 5. Using check syntax: check if the formula you entered is valid or not.



6. Error Message: Please give a valid phone number

7. Error location: select field

8. Save.

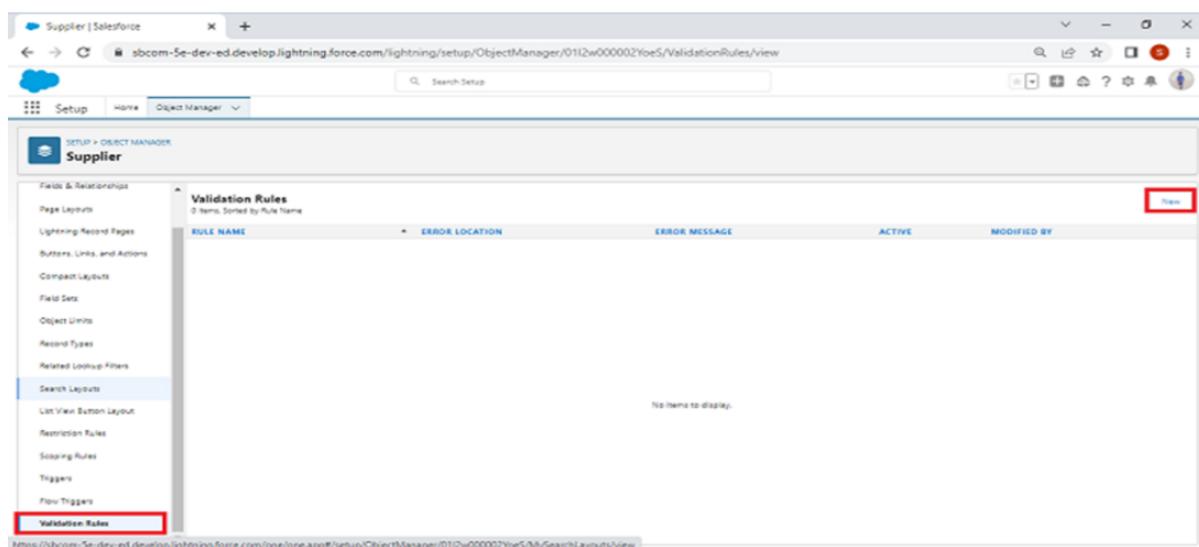


## Activity – 2

**Create a Validation rule For Technical Site Checkbox is equal to True.**

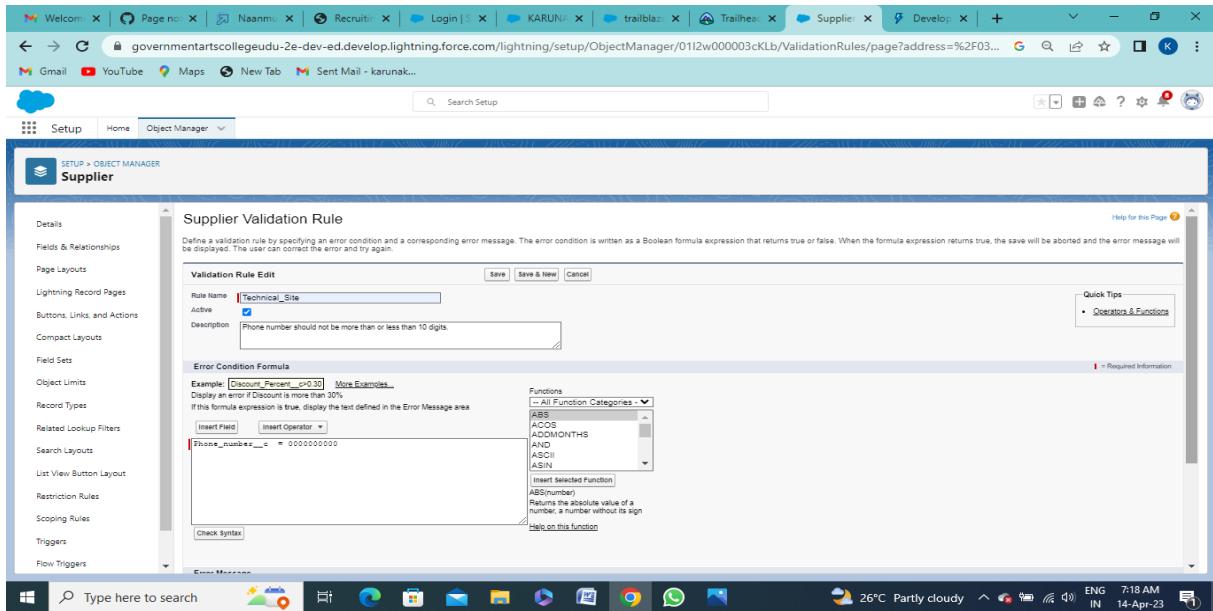
**To create a validation rule:**

- Go to object manager and Select the object on which ( For example: Supplier) validation rule has to be implemented, scroll down and click validation rule, New.



Give details as:

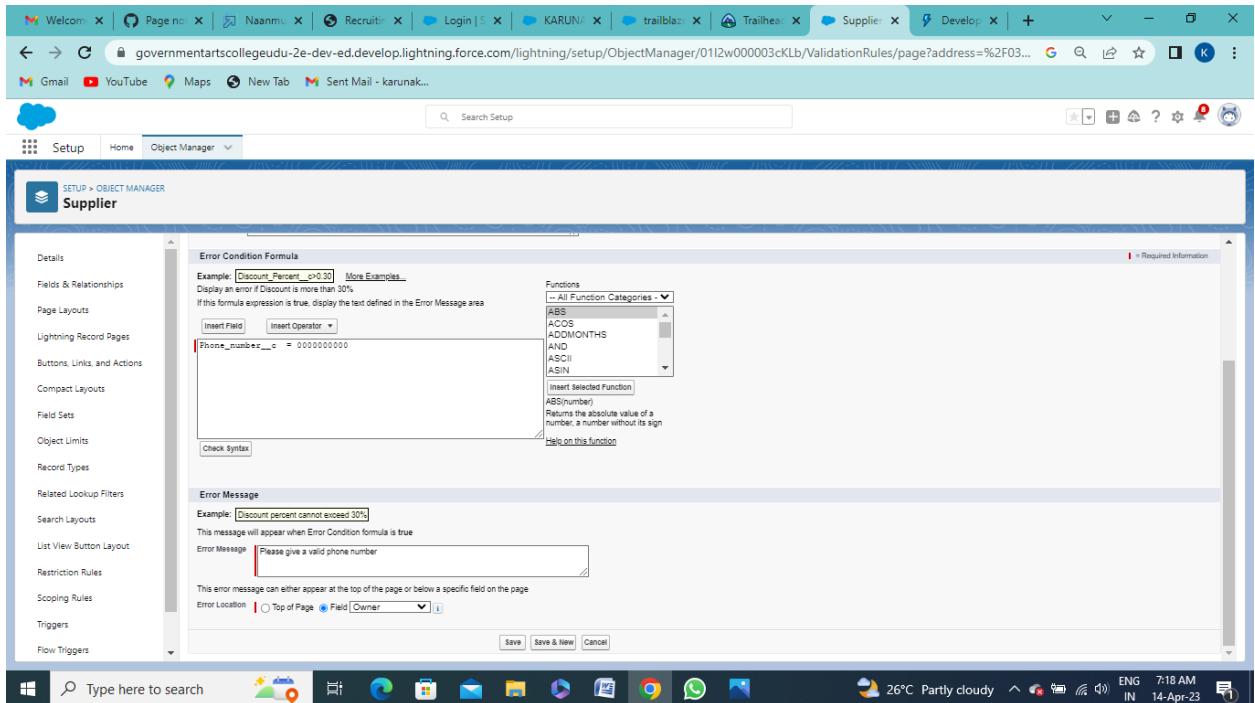
1. Rule name: Technical Site.
2. Active: checked
3. Description: phone number should not be more than or less than 10 digits.
4. Under Error Condition Formula: write the condition using insert field, insert operator, insert function
5. Using check syntax: check if the formula you entered is valid or not.



6. Error Message: Please give a valid phone number

7. Error location: select field

8. Save.

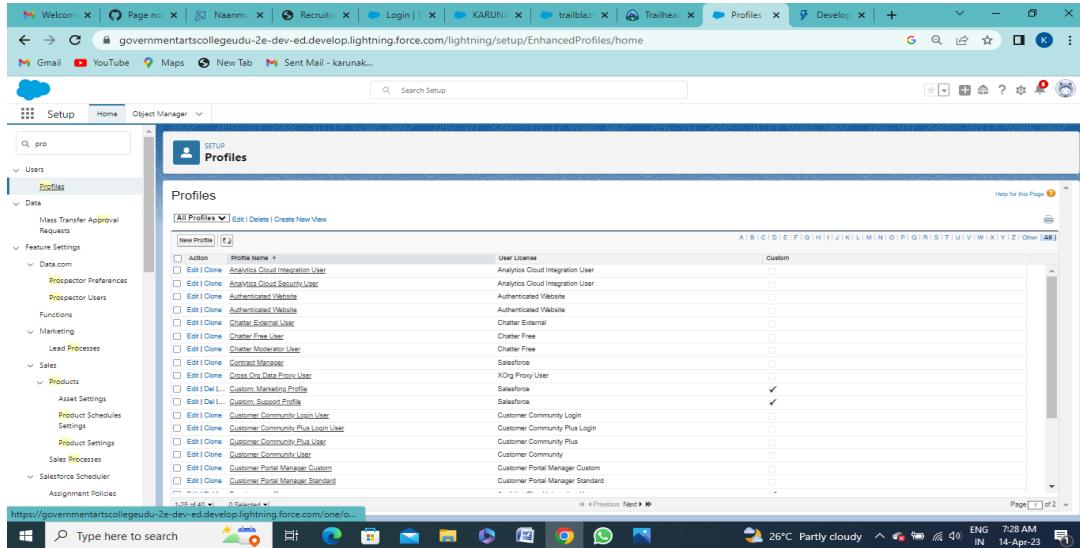


# 9. Profile:

## Activity:

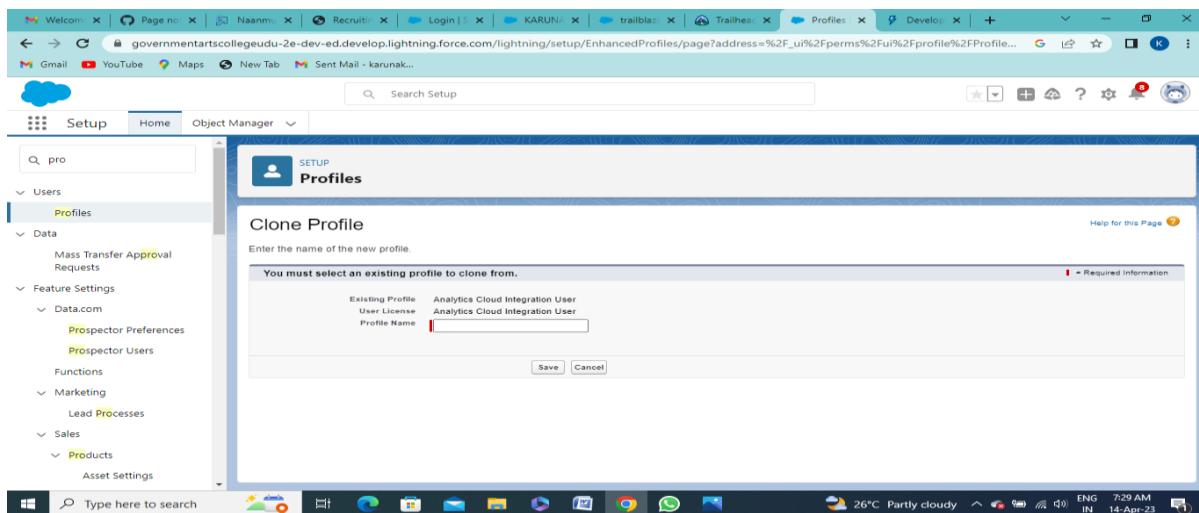
### Creation on profile:

From Setup enter Profiles in the Quick Find box, and select Profiles.



The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected under the 'Users' section. The left sidebar includes sections for Data Transfer Approval Requests, Feature Settings, Data.com (Prospector Preferences, Prospector Users), Marketing (Lead Processes), Sales (Products, Asset Settings, Product Schedules, Product Settings, Sales Processes), and Salesforce Scheduler. The main content area displays a list of profiles with columns for Action, Profile Name, User License, and Status (Custom). Profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Admin External User, Admin Internal User, Chatter External User, Chatter Free User, Chatter Moderator User, Contract Manager, Custom Data Proxy User, Custom Marketing Profile, Custom Support Profile, Customer Community Login, Customer Community Plus Login, Customer Community Plus User, Customer Community User, Customer Portal Manager Custom, and Customer Portal Manager Standard. A search bar at the top right says 'Search Setup'.

1. From the list of profiles, find Standard User.
2. Click Clone.
3. For Profile Name, enter Event user profile.
4. Click Save.



The screenshot shows the 'Clone Profile' dialog box from the Salesforce Setup interface. It prompts the user to 'Enter the name of the new profile.' and 'You must select an existing profile to clone from.' A table lists the 'Existing Profile' as 'Analytics Cloud Integration User', 'User License' as 'Analytics Cloud Integration User', and 'Profile Name' as a field where the user has typed 'Event'. At the bottom are 'Save' and 'Cancel' buttons. The background shows the same Setup navigation bar and sidebar as the previous screenshot.

5. While still on the Event profile page, then click Edit.

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with a search bar and sections for Users, Profiles, Data, Feature Settings, Data.com, Marketing, Sales, and Products. The 'Profiles' section is currently selected. In the main area, a card titled 'Event user profile' is displayed with the sub-section 'Profile Detail'. The 'Edit' button is highlighted in yellow. Other buttons include 'Clone', 'Delete', and 'View Users'. Below this, there's a table for 'Page Layouts' and another for 'Standard Object Layouts'. At the bottom of the page, there's a toolbar with various icons and system status information like weather and time.

6. Scroll down to Custom Object Permissions and Give view all access permissions to the Order details, supplier, product, customer, category, payment.

The screenshot shows the 'Custom Object Permissions' section in the Salesforce Setup. A red box highlights the main grid where permissions are assigned. An arrow points to the 'Order\_Details' row. The grid has columns for 'Read', 'Create', 'Edit', 'Delete', 'Data Administrations', 'View All', and 'Modify All'. The 'Data Administrations' column contains checkboxes for 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All'. The 'View All' and 'Modify All' checkboxes are checked for 'Order\_Details'. Other objects listed include Activities, Attendees, Status, Categories, Customers, Demos, Events, Issues, Orders, Payments, Products, Reservations, Roles, Rooms, Schedules, SolarBot Status, Speakers, Staffs, Students, Student Activities, Suppliers, Teachers, Vendors, Volunteer Activities, Volunteer Jobs, Volunteer Shifts, and Volunteer Shift Workers.

## Activity – 2

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

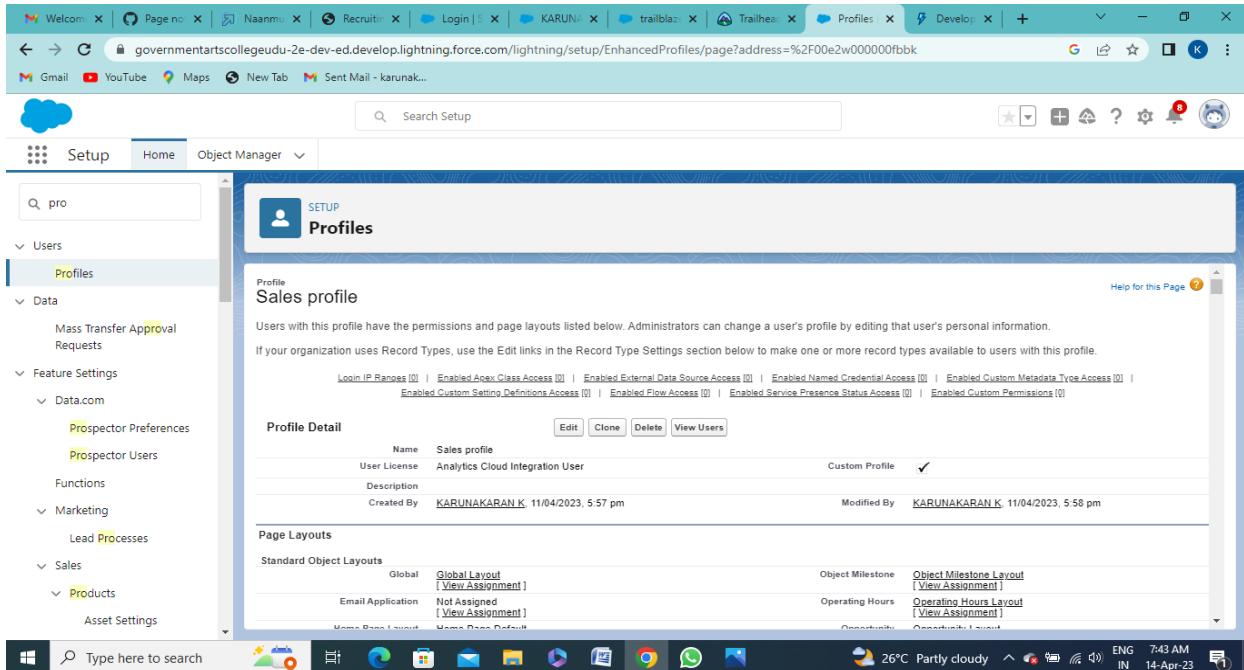
From Setup enter Profiles in the Quick Find box, and select Profiles.

The screenshot shows the Salesforce Setup interface with the 'Profiles' section selected. The left sidebar includes sections like 'Users', 'Data', 'Feature Settings', 'Marketing', 'Sales', and 'Products'. The main area displays a list of profiles with columns for 'Profile Name', 'User License', and 'Custom'. The 'User License' column lists various standard and custom user types. The 'Custom' column contains checkmarks for some profiles. A search bar at the top right says 'Search Setup'.

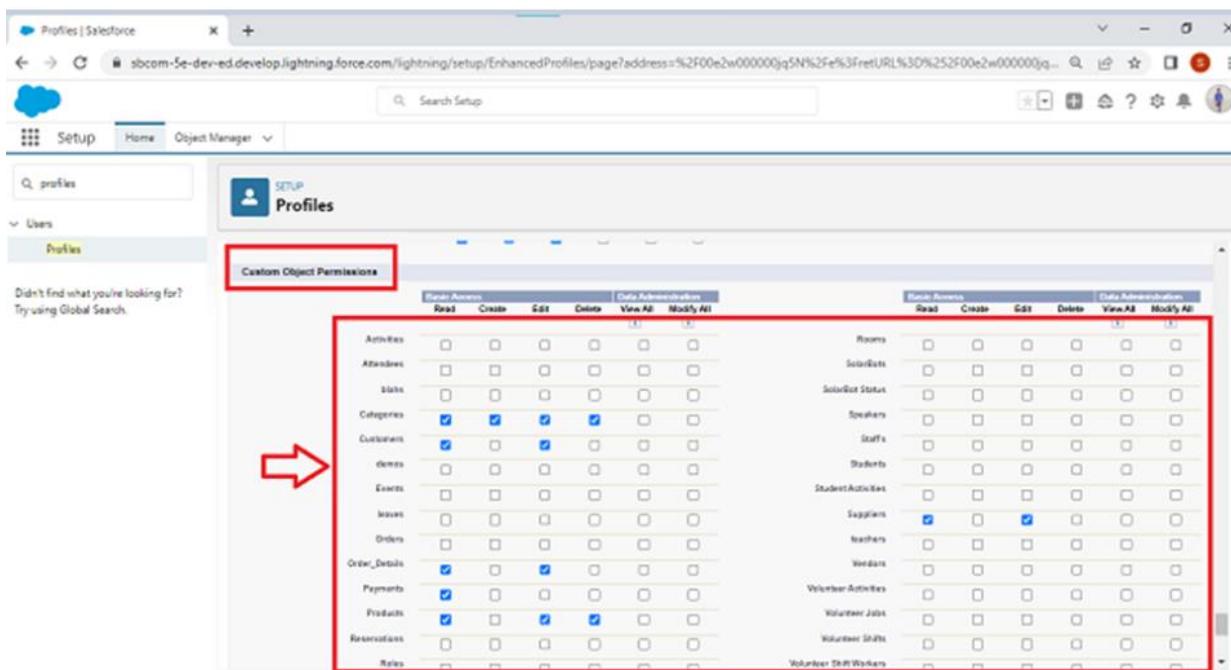
1. From the list of profiles, find Standard User.
2. Click Clone.
3. For Profile Name, enter Event user profile.
4. Click Save.

The screenshot shows the 'Clone Profile' dialog box. It prompts the user to 'Enter the name of the new profile.' Below this, it says 'You must select an existing profile to clone from.' A dropdown menu shows 'Existing Profile' and 'User License' set to 'Analytics Cloud Integration User'. The 'Profile Name' field is empty and highlighted with a red border. At the bottom are 'Save' and 'Cancel' buttons.

5. While still on the Event profile page, then click Edit.



6. Scroll down to Custom Object Permissions and Give view all access permissions to the Order details, supplier, product, customer, category, payment.

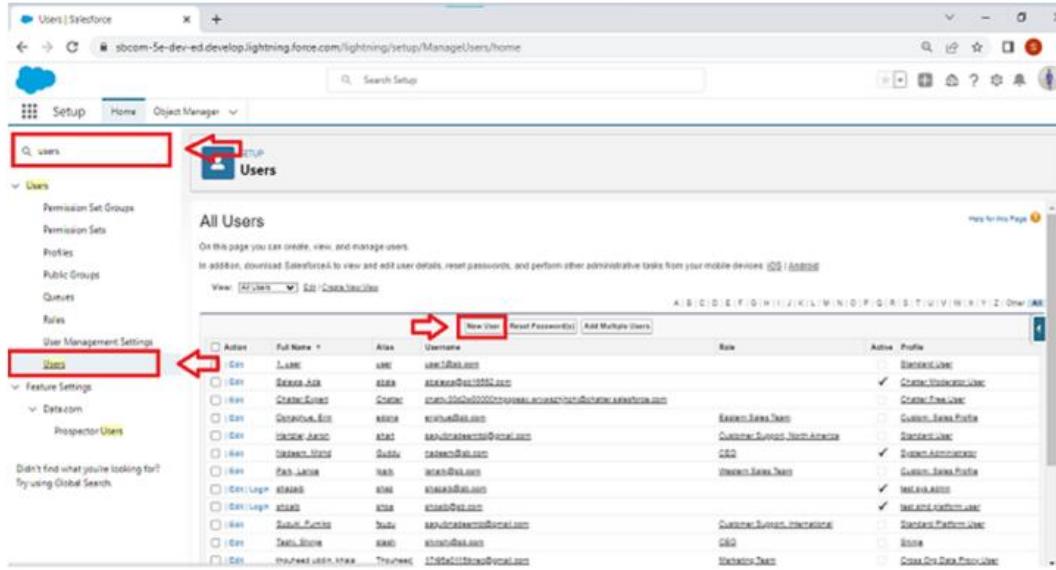


# 10. User:

## Activity – 1

### Creating a User:

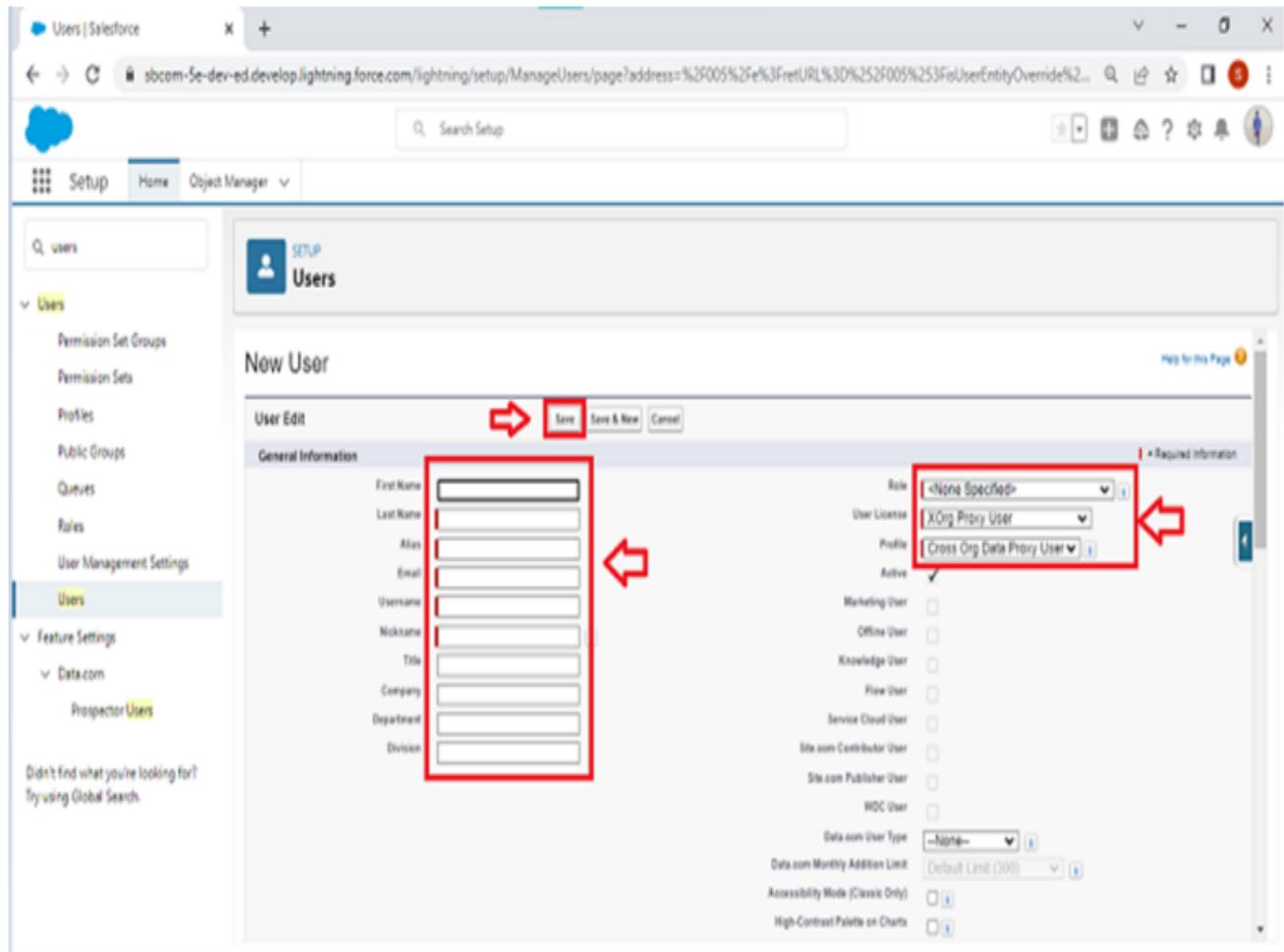
From setup type “users” in quick find and select users, then click New User



The screenshot shows the Salesforce Setup interface with the following details:

- Search Bar:** A red box highlights the search bar containing "Q users".
- Sidebar:** A red box highlights the "Users" link under the "Users" section of the sidebar.
- Header:** A red box highlights the "New User" button at the top right of the user list table.
- User List:** The main area displays a table titled "All Users" with columns: "Avatar", "Full Name", "Alias", "Username", "Role", "Active", and "Profile". The table lists several users, including "Sanjay Gupta" (Avatar: Sanj, Full Name: Sanjay Gupta, Alias: Sanj, Username: karunakaran3809@gmail.com, Role: Customer Support, Active: Yes, Profile: Event User Profile).

- First Name: Sanjay
- Last Name: Gupta
- Alias: Sanj
- Email: karunakaran3809@gmail.com
- Username: karunakaran3809@gmail.com
- Nickname: Sanju
- Role: leave it as default
- User License: Salesforce
- Profile: Event User Profile



## Activity -2

**Create a user with a username as “Abhilash Garapati”, and assign him the sales profile.**

From setup type “users” in quick find and select users, then click New User

The screenshot shows the Salesforce 'All Users' page. At the top left, there's a search bar with the placeholder 'Q users'. Below it, a red box highlights the 'Users' icon in the navigation bar. The main content area has a red box around the 'New User' button. A red arrow points from the 'New User' button to the 'Create New User' link in the top right of the user list table. The table lists various users with columns for 'Active', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. Several rows have red boxes around them, indicating specific users or actions.

Active	Full Name	Alias	Username	Role	Active	Profile
✓	John Doe	JDOE	user1@salesforce.com	System Admin	✓	Standard User
✓	Susan Lee	SLEE	user2@salesforce.com	Customer Support	✓	Customer Support User
✓	Christopher	CHRIS	user3@salesforce.com	Customer Support	✓	Customer Support User
✓	Deborah Scott	DEBSCOTT	user4@salesforce.com	Executive Team	✓	Custom_Sales_Profle
✓	Carrie Anne	CAANNE	user5@salesforce.com	Customer Support, North America	✓	Customer_Support_Profle
✓	David Scott	DAVIDS	user6@salesforce.com	CEO	✓	Standard Admin
✓	Robert Scott	ROBERTS	user7@salesforce.com	Executive Team	✓	Custom_Sales_Profle
✓	Patricia Scott	PATRICIAS	user8@salesforce.com	Executive Team	✓	Custom_Sales_Profle
✓	Chris Lopez	CHILOPEZ	user9@salesforce.com	Customer Support	✓	Standard Platform User
✓	Anna Lopez	ANALOPEZ	user10@salesforce.com	Customer Support, International	✓	Standard Platform User
✓	Mark Johnson	MJONSON	user11@salesforce.com	CEO	✓	Standard Platform User
✓	Elizabeth Scott	ELIZSCOTT	user12@salesforce.com	Executive Team	✓	Custom_Orchestrator_User

- First Name: Abhilash
  - Last Name: Garapati
  - Alias: Abhi
  - Email: abhilashgarapati777@gmail.com
  - Username: abhilashgarapati777@gmail.com
  - Nickname: Abhilash
  - Role: leave it as default
  - User License: Sales force
  - Profile: Event User Profile

The screenshot shows the Salesforce Setup interface with the 'Users' page open. A new user record is being created. The 'General Information' section is highlighted with a red box, and the 'Role' field dropdown is also highlighted with a red box. The 'Role' dropdown shows options like 'None Specified', 'XOrg Proxy User', and 'Cross Org Data Proxy User'. The 'Save & New' button is visible at the top right.

# 11: Permission set:

## Activity – 1

### Creating a Permission Set:

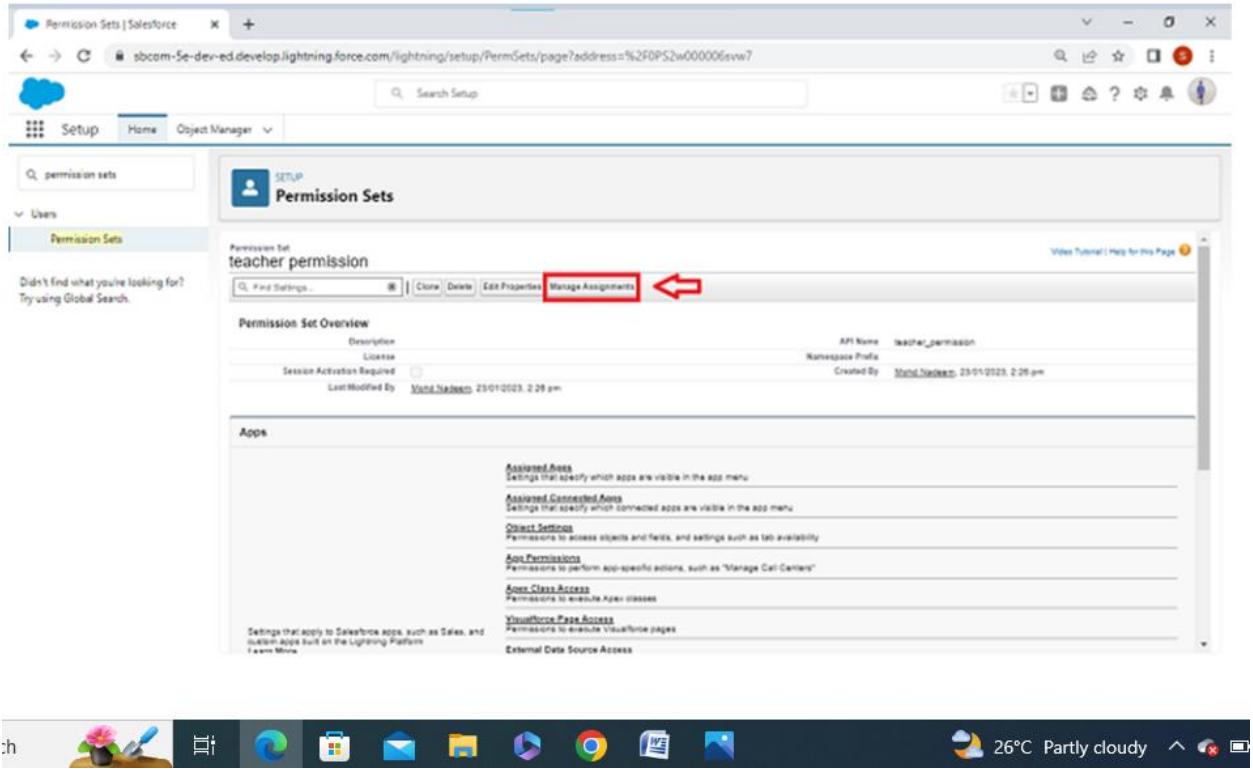
- From setup search “permission sets” in quick find and select permission set then click on New.

The screenshot shows the Salesforce Setup interface for managing Permission Sets. At the top, there's a search bar with 'permission sets' typed in. Below it, a navigation bar has 'Permission Sets' selected. The main area displays a list of existing permission sets with columns for Action, Permission Set Label, Description, and Licensee. A red box highlights the 'New' button at the top left of the list table, and another red box highlights the search bar.

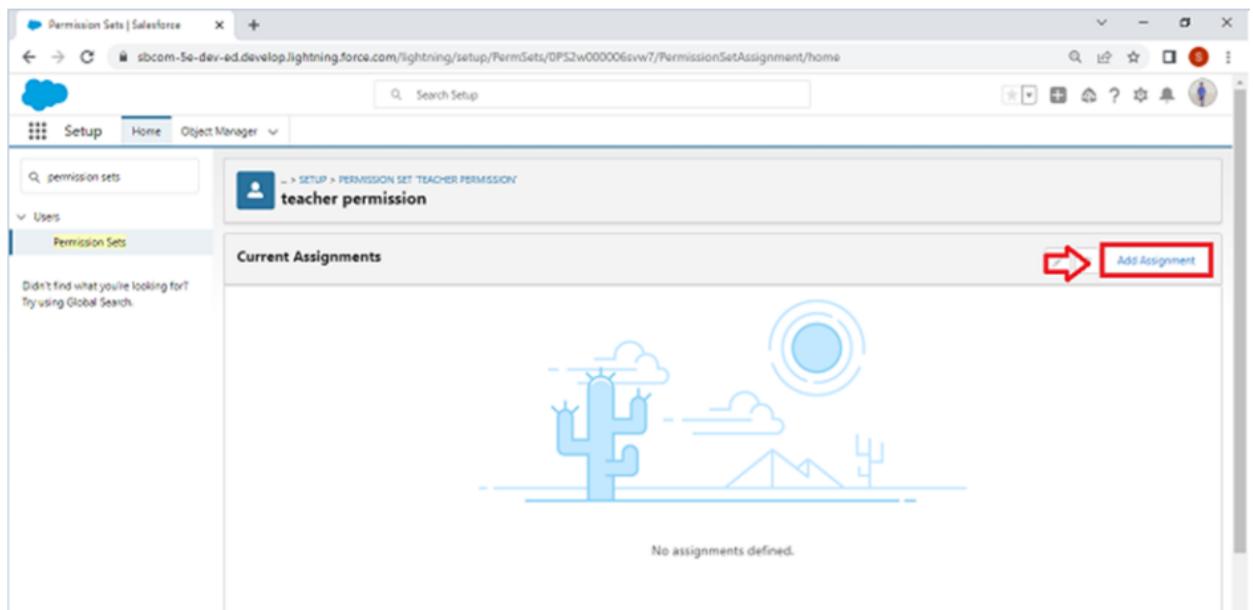
- Enter label as: Supplier Permits and Save.

The screenshot shows the 'Create' dialog for a new Permission Set. It has fields for 'Label' (which is highlighted with a red box), 'API Name', 'Description', and 'Session Activation Required'. Below these, there's a section for selecting user types and a note about license assignment. At the bottom, there are 'Save' and 'Cancel' buttons, both of which are highlighted with red boxes.

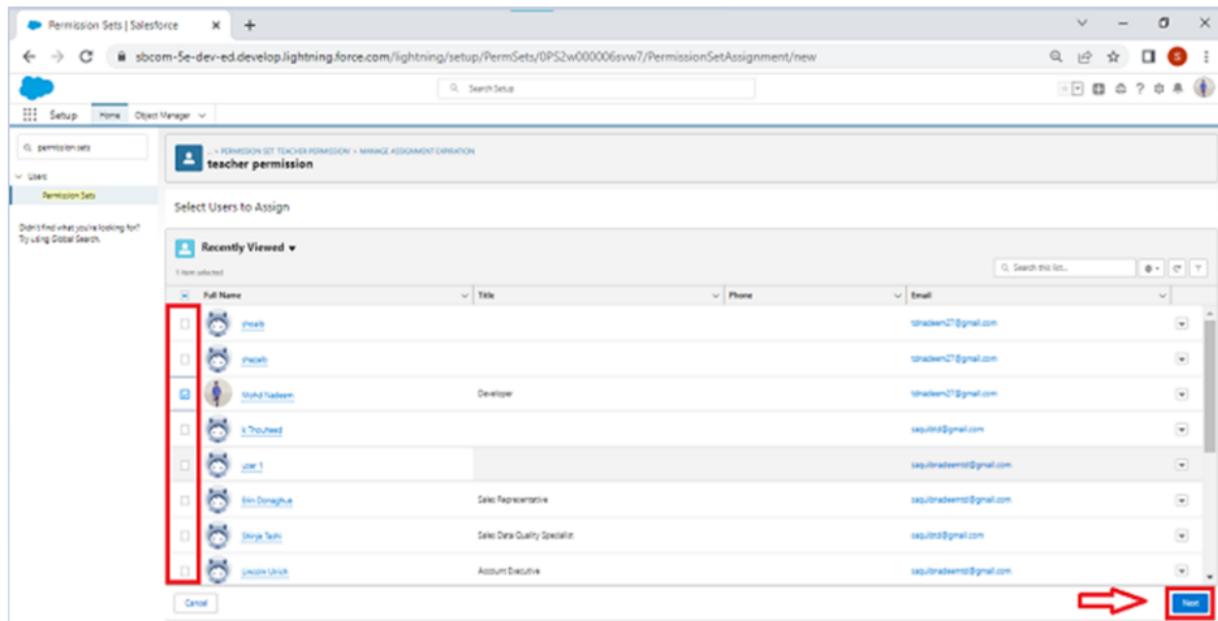
### 3. After saving the permission click on the Manage assignment



### 4. Now click on the Add Assignment



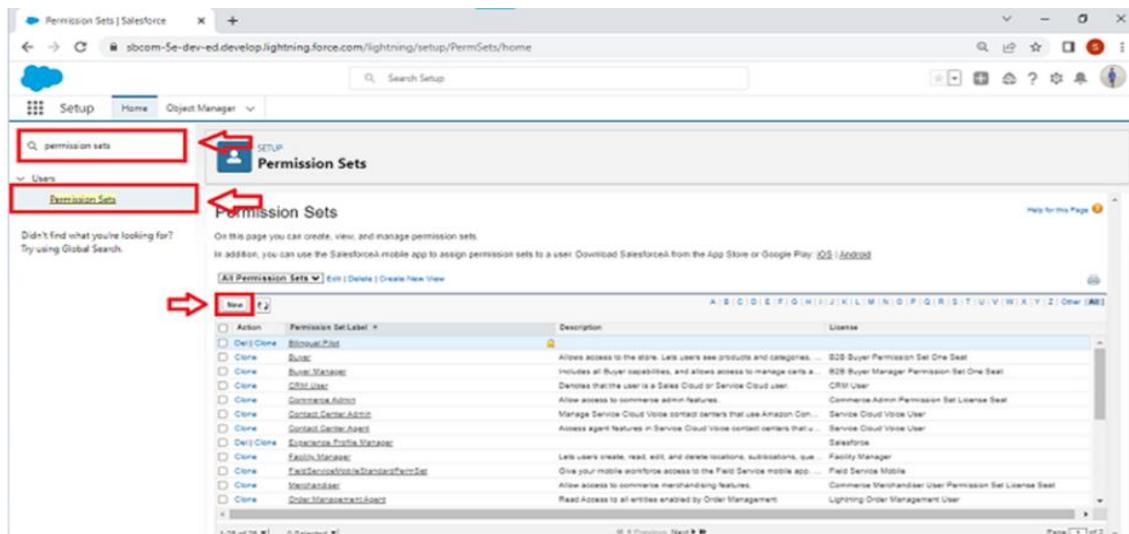
5. Now select the users and click on save



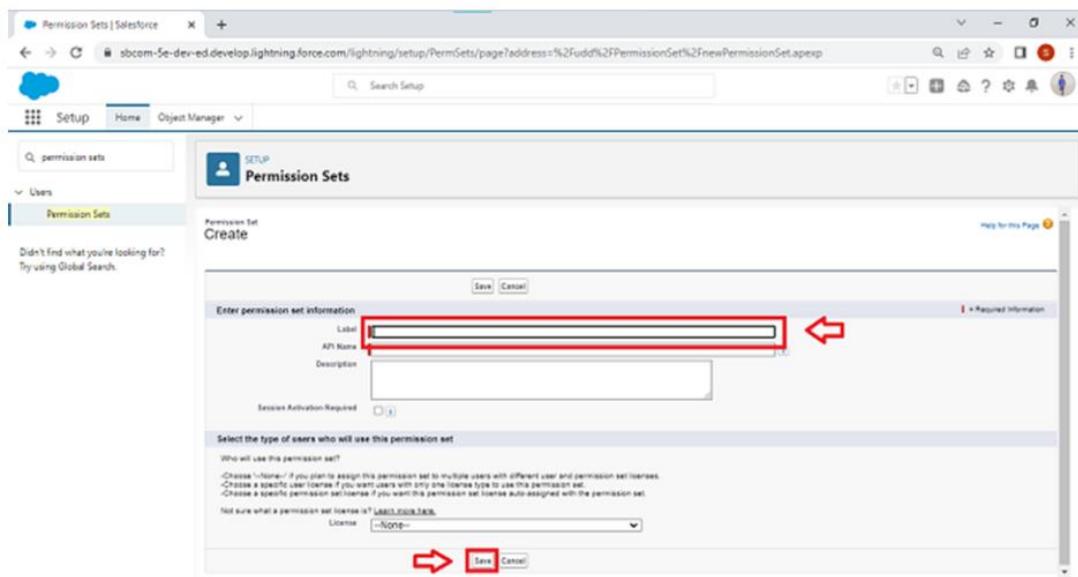
## Activity – 2

### Create a Permission set for Review object:

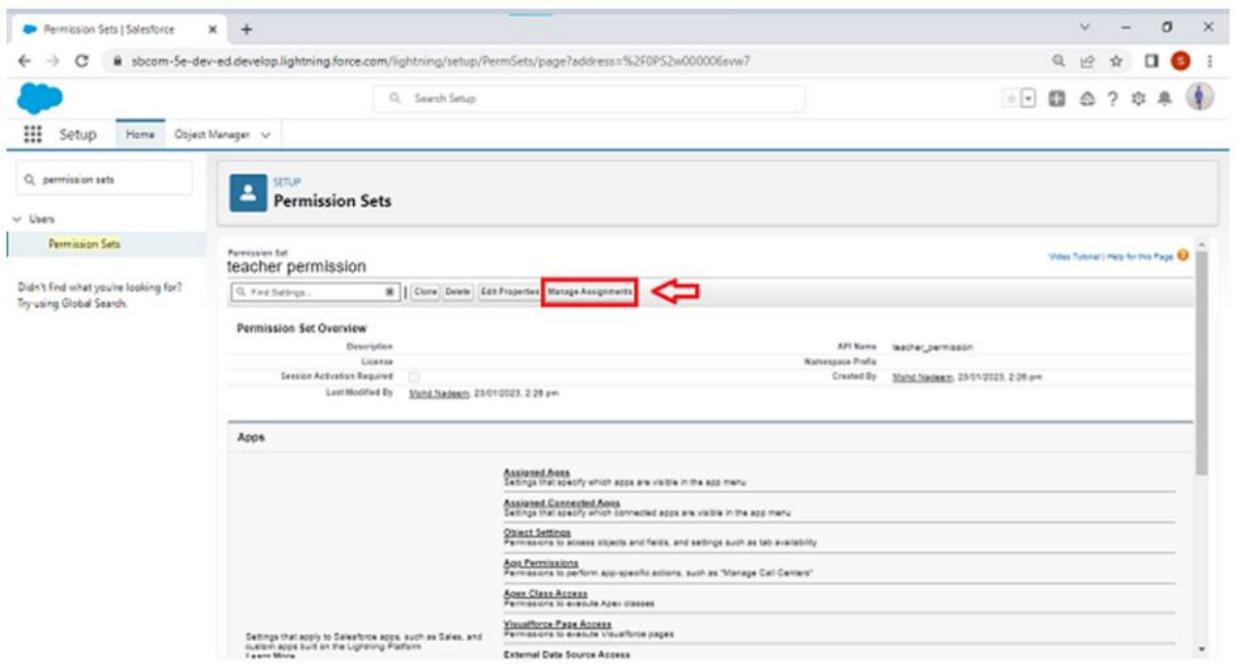
1. From setup search “permission sets” in quick find and select permission set then click on New.



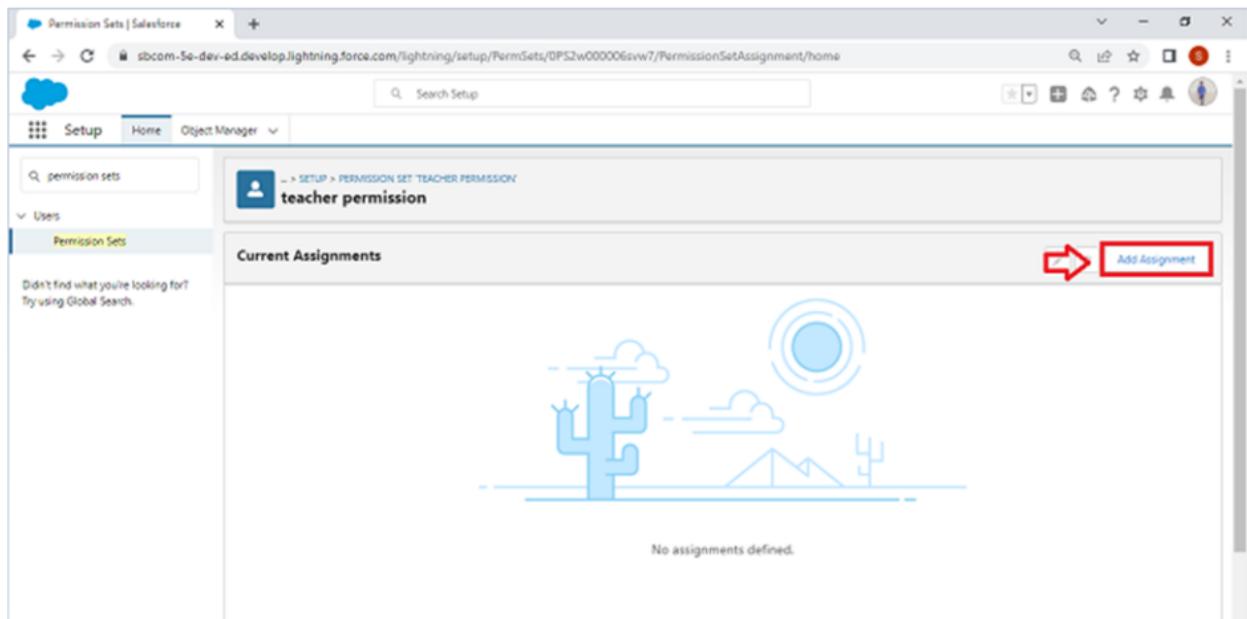
## 2. Enter label as: Review and Save.



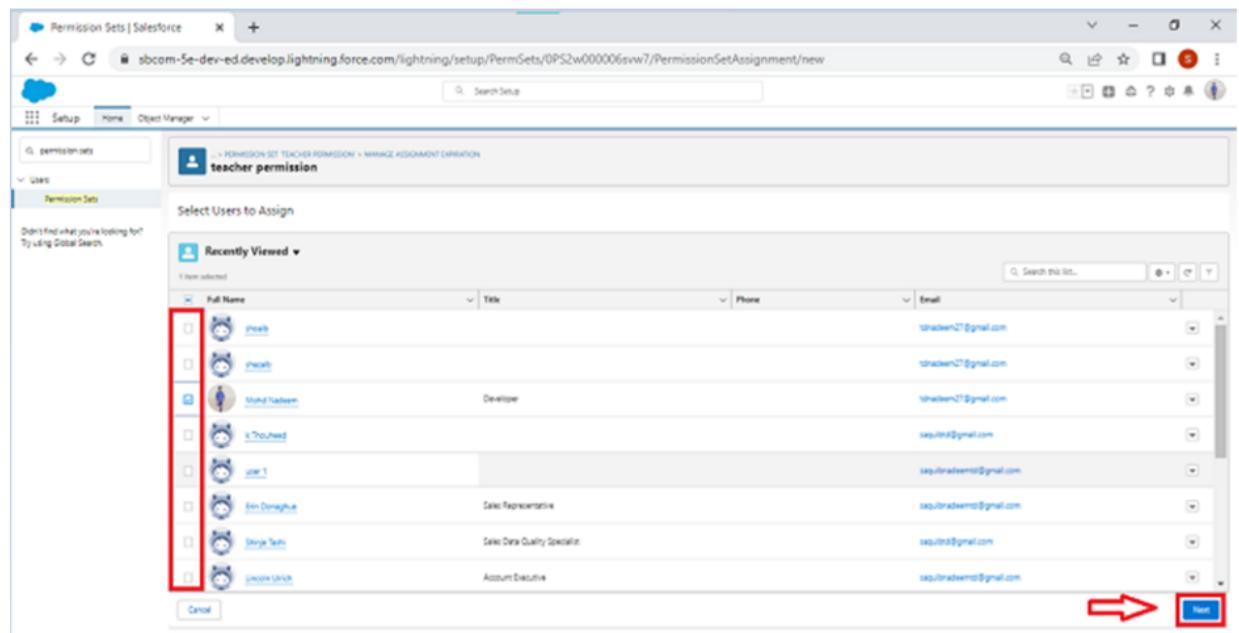
## 3. After saving the permission click on the Manage assignment



4. Now click on the Add Assignment



5. Now select the users and click on save

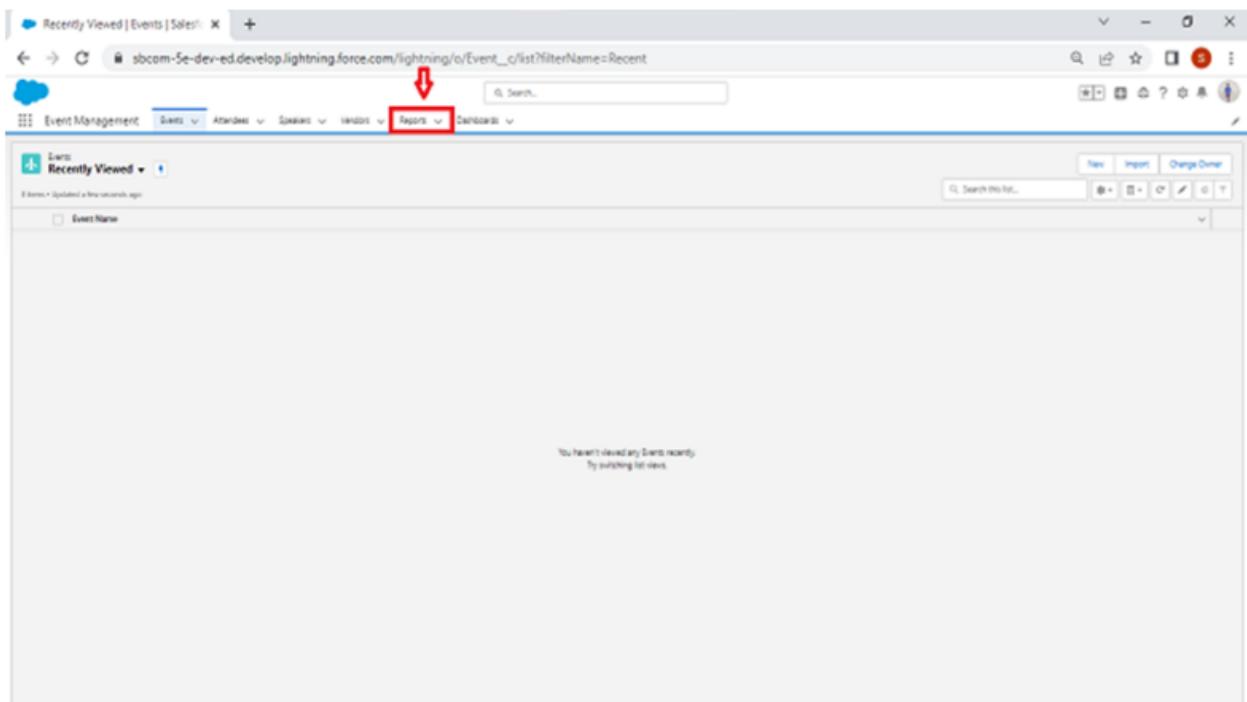


## 12. Reports:

### Activity – 1

#### Reports:

- From the Reports tab, click New Report.



The screenshot shows the Salesforce Reports interface. At the top, there is a navigation bar with tabs: Reports, Guests, Attendees, Speakers, Vendors, Reports (highlighted with a red box and has a red arrow pointing to it), and Dashboard. Below the navigation bar, there is a search bar labeled "Search..." and a "New Report" button (highlighted with a red box). The main area displays a list of reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The list includes various reports such as "New Supplier Report", "Order Details with Bill To and Order Date", "New Products with Category ID Report", "Sales Rep Win Rate", "Sample Report Screen Flow", "Residential by Market", "Open Support Cases", "Resident Accounts to Date", "High Value Residential", "Central and Eastern Target Accounts", "Last 7 Days", "Opportunities by Rep", "Sample Metrics Report Current P2", "Opportunities by Rep and Close Month", and "Hotel Reservation for Report".

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Supplier Report	NG Reports	Mohd Nadeem	23/12/2022 8:42 am		
CreatedBy Me	Order Details with Bill To and Order Date	NG Reports	Mohd Nadeem	23/12/2022 8:40 am		
All Reports	New Products with Category ID Report	NG Reports	Mohd Nadeem	23/12/2022 8:39 am		
All Reports	Sales Rep Win Rate	How well are my sales reps doing?	Global Sales Reports	Mohd Nadeem	30/12/2022, 11:59 pm	
All Reports	Sample Report Screen Flow	Which flows run, what's the status of each flow view, and how long do users take to complete the screens?	Public Reports	Automated Process	4/12/2022, 10:12 am	
All Folders	Residential by Market	Residential Reports	Mohd Nadeem	30/12/2022, 8:19 pm		
All Folders	Open Support Cases	Residential Reports	Mohd Nadeem	2/1/2023, 9:26 pm		
Created By Me	Resident Accounts to Date	Residential Reports	Mohd Nadeem	2/1/2023, 9:21 pm		
Shared with Me	High Value Residential	Residential Reports	Mohd Nadeem	30/12/2022, 4:23 pm		
All Folders	Central and Eastern Target Accounts	Who are our important customers in the Central and Eastern states?	Marketing Reports	Mohd Nadeem	30/12/2022, 11:19 am	
All Folders	Last 7 Days	Who hasn't logged in the last 7 days?	Retention Reports	Mohd Nadeem	30/12/2022, 11:24 am	
All Folders	Opportunities by Rep	What opportunities do reps have in the pipeline?	Global Sales Reports	Mohd Nadeem	30/12/2022, 11:21 pm	
All Folders	Sample Metrics Report Current P2	How big are the deals at each stage in the pipe (Line 0, P2)?	Global Sales Reports	Mohd Nadeem	30/12/2022, 11:40 pm	
All Folders	Opportunities by Rep and Close Month	What opportunities do your sales reps have in the pipeline and when do they close?	Global Sales Reports	Mohd Nadeem	30/12/2022, 11:24 pm	
All Folders	Hotel Reservation for Report	Shared list for the demo purpose. It doesn't include any conditions and requirement.	Private Reports	Mohd Nadeem	30/12/2022, 9:52 pm	

- Select the report type Attendees with events for the report, and click Create

Create Report

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard
Contacts with Assets	Standard
Account History	Standard
Contact History	Standard
D&B Company with and without Accounts	Standard
Opportunities	Standard
Opportunities with Products	Standard

### 3. Customize your report accordingly and include all fields, then save or run it.

New Accounts Report

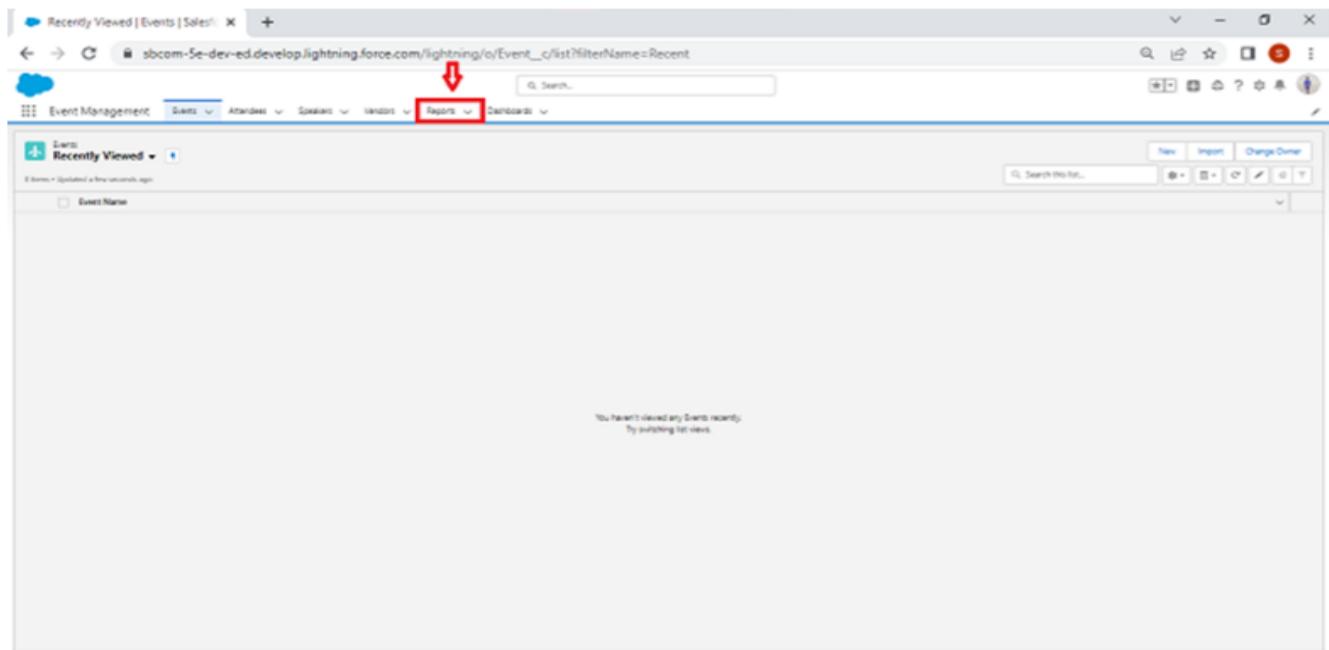
Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
-	Automated Process	Sample Account for Entitlements	-	-	-	16/03/2023
1	KARUNAKARAN K	GenePoint	CA	Customer - Channel	Cold	16/03/2023
2	KARUNAKARAN K	United Oil & Gas, UK	UK	Customer - Direct	-	16/03/2023
3	KARUNAKARAN K	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	16/03/2023
4	KARUNAKARAN K	Edge Communications	TX	Customer - Direct	Hot	16/03/2023
5	KARUNAKARAN K	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	16/03/2023
6	KARUNAKARAN K	Pyramid Construction Inc.	-	Customer - Channel	-	16/03/2023
7	KARUNAKARAN K	Dickenson plc	KS	Customer - Channel	-	16/03/2023
8	KARUNAKARAN K	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	16/03/2023
9	KARUNAKARAN K	Express Logistics and Transport	OR	Customer - Channel	Cold	16/03/2023
10	KARUNAKARAN K	University of Arizona	AZ	Customer - Direct	Warm	16/03/2023
11	KARUNAKARAN K	United Oil & Gas Corp.	NY	Customer - Direct	Hot	16/03/2023
12	KARUNAKARAN K	sForce	CA	-	-	16/03/2023
13	KARUNAKARAN K					

## Activity – 2

# Create a report for review and Job Posting Objects.

## Reports:

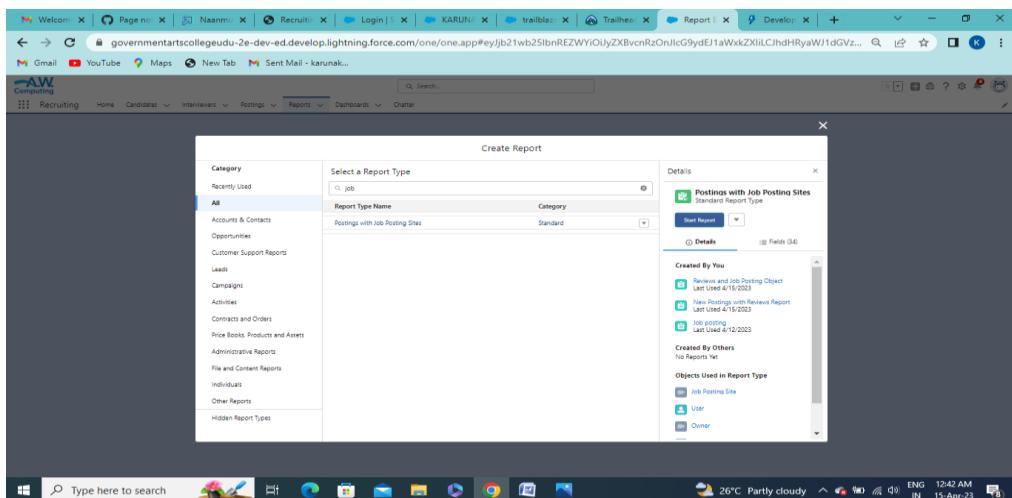
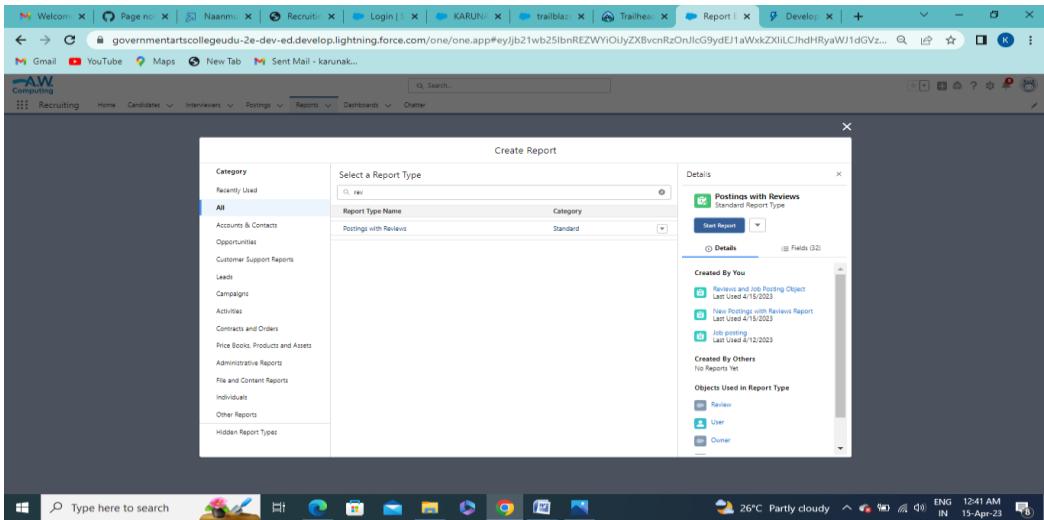
1. From the Reports tab, click New Report.



A screenshot of a web browser window displaying the Salesforce Reports interface. The URL is sbcom-5e-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=zmrU. The top navigation bar shows 'Reports' as the active tab, which is highlighted with a red box and a red arrow pointing to it. Below the navigation bar is a search bar labeled 'Search...'. The main content area is a table titled 'Reports' with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table lists various reports such as 'New Supplier Report', 'New Products with Category ID Report', 'Sales Rep Win Rates', etc. At the bottom right of the table, there is a red box highlighting the 'New Report' button.

Report	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Supplier Report	What are our new suppliers?	MS Reports	Vishal Nadeem	23/1/2023 8:42 am	
Shared By Me	Order Details with Billing and Order Date	What are the details of all orders?	MS Reports	Vishal Nadeem	23/1/2023 8:40 am	
All Reports	New Products with Category ID Report	What are the new products with their category IDs?	MS Reports	Vishal Nadeem	23/1/2023 8:38 am	
Public Reports	Sales Rep Win Rates	How well are my sales reps doing?	Global Sales Reports	Vishal Nadeem	30/12/2022 11:58 pm	
All Reports	Sample Row Report: Screen Rows	What does this report do?	Public Reports	Automated Process	4/10/2022 10:13 am	
Followed	Residential by Market	What are the residential markets?	Residential Reports	Vishal Nadeem	30/12/2022 4:19 pm	
All Folders	Open Support Cases	What are the open support cases?	Residential Reports	Vishal Nadeem	2/1/2023 8:38 pm	
Created By Me	New Accounts by Date	What are the new accounts by date?	Residential Reports	Vishal Nadeem	2/1/2023 8:31 pm	
Shared With Me	High Value Residential	What are the high value residential accounts?	Residential Reports	Vishal Nadeem	30/12/2022 4:29 pm	
All Reports	Central and Eastern Target Accounts	Who are our important customers in the Central and Eastern zones?	Marketing Reports	Vishal Nadeem	30/12/2022 11:10 am	
All Reports	Users Not Logged in Last 7 Days	Who hasn't logged in in the last 7 days?	Adoption Reports	Vishal Nadeem	30/12/2022 11:24 am	
All Reports	Opportunities by Rep	What opportunities do reps have in the pipeline?	Global Sales Reports	Vishal Nadeem	30/12/2022 11:21 pm	
All Reports	Opportunity Metrics Report Current P2	How big are the deals at each stage in the pipeline?	Global Sales Reports	Vishal Nadeem	30/12/2022 11:40 pm	
All Reports	Opportunities by Rep and Close Month	What opportunities do your sales reps have in the pipeline and when do they close?	Global Sales Reports	Vishal Nadeem	30/12/2022 11:34 pm	
All Reports	Report reservation for report	CREATED JUST FOR THE DEMO PURPOSE. IT DOESN'T INCLUDE ANY CONDITIONS AND REQUIREMENT	Private Reports	Vishal Nadeem	30/12/2022 11:52 pm	

2. Select the report type Attendees with events for the report, and click Create.



3. Customize your report accordingly and include all fields, then save or run it.

Reports							
Recent		Report Name	Description	Folder	Created By	Created On	Subscribed
Created by Me	Reviews and Job Posting Object	Private Reports	KARUNAKARAN K	15/4/2023, 12:39 am			
Private Reports	New Postings with Reviews Report	Private Reports	KARUNAKARAN K	11/4/2023, 9:09 pm			
Public Reports	Accounts Report	Private Reports	KARUNAKARAN K	15/4/2023, 12:20 am			
All Reports	Accounts	Private Reports	KARUNAKARAN K	11/4/2023, 6:56 pm			
FOLDERS	Job posting	Private Reports	KARUNAKARAN K	11/4/2023, 9:06 pm			
All Folders							
Created by Me							
Shared with Me							
FAVORITES							
All Favorites							

#### **4. Trailhead Profile Public URL:**

Team Leader – <https://trailblazer.me/id/karuk13>

Team Member 1 – <https://trailblazer.me/id/suren19>

Team Member 2 – <https://trailblazer.me/id/santn20>

Team Member 3 – <https://trailblazer.me/id/kania8>

## **PROJECT REPORT TEMPLATE**

#### **5. ADVANTAGES & DISADVANTAGES:**

##### **Advantages of Working in HR**

1. Working as a human resource manager is not that stressful
2. You can work with many different people
3. HR managers can build a strong business network
4. Human resource managers can work indoors
5. You can make decent money as a human resource officer
6. Human capital managers work rather short hours
7. You have free weekends and holidays
8. Good work-life balance for HR managers
9. Good balance between computer work and human interaction
10. Decent promotion options
11. You don't have to work in a hard physical manner
12. You can start your own business
13. HR managers can improve their people skills
14. You can help your friends with optimizing their applications

- 15.Tele working might be possible
- 16.HR managers can work for many different companies

## Disadvantages of Being a Human Resource Manager

1. HR managers don't learn many hard skills
2. You are replaceable pretty easily
3. Questionable future job prospects for human resource managers
4. You need a college degree for working in HR
5. Student loan debt may financially constrain you in the future
6. You have to dress up for work
7. Can be problematic if you are an introverted person
8. You will not get rich as an HR manager
9. HR managers often have to deal with difficult people
10. You will often have to do organizational tasks
11. Working in HR may become boring in the long run
12. Difficult to get out of the HR industry

## 6. APPLICATIONS:

We are looking for an HR Manager to oversee all aspects of human resources practices and processes. What is an HR Manager? To us, an HR Manager is the go-to person for all employee-related issues.

This means that your HR Manager duties will involve managing activities such as job design, recruitment, employee relations, performance management, training & development and talent management.

The job of HR Manager is important to business success. People are our most important asset and you'll be the one to ensure we have a happy and productive workplace where everyone works to realize our established mission and objectives.

Promoting corporate values and shaping a positive culture is a vital aspect of a complete HR Manager job description and specification.

## Responsibilities -

- Develop and implement HR strategies and initiatives aligned with the overall business strategy
- Bridge management and employee relations by addressing demands, grievances or other issues
- Manage the recruitment and selection process
- Support current and future business needs through the development, engagement, motivation and preservation of human capital
- Develop and monitor overall HR strategies, systems, tactics and procedures across the organization
- Nurture a positive working environment
- Oversee and manage a performance appraisal system that drives high performance
- Maintain pay plan and benefits program
- Assess training needs to apply and monitor training programs
- Report to management and provide decision support through HR metrics
- Ensure legal compliance throughout human resource management

## **Requirements -**

- Proven working experience as HR Manager or other HR Executive
- People oriented and results driven
- Demonstrable experience with Human Resources metrics
- Knowledge of HR systems and databases

- Ability to architect strategy along with leadership skills
- Excellent active listening, negotiation and presentation skills
- Competence to build and effectively manage interpersonal relationships at all levels of the company
- In-depth knowledge of labor law and HR best practices

Degree in Human Resources or related field

Job Types: Full-time, Regular / Permanent

Salary: From ₹25,000.00 per month

## **7.Conclusion:**

Therefore, we can see that human resources as a career is very compelling for those who love to do social work and working with different types of people. So according to your ability and the human resources advantages and disadvantages presented here, you should decide whether it is in your best interest to work in the world of human resources or not.

If you are one of those people who wants to impact the performance of a company and who likes or is better in handling human-related problems then a career in human resources is the best for you.

Not only will you be working with lots of people, but you will also be in charge of different jobs that will have a direct impact on the performance of the company, helping an organization to shape its future and earn profits in the future.

## **8. FUTURE SCOPE:**

Human Resource Management Professionals are termed as the backbone of an organization. There is a huge demand for such professionals in both the public and private sectors. No matter if you're looking at startups or big reputed companies, human resources play a crucial role in the formation of a company's future. The human resources management department basically is the team that helps an organization increase productivity while also maintaining employee satisfaction.

Due to the great demand for these professionals, this is the right time to start preparing to follow your career as an HR. Human Resource managers are considered as the controllers of the human resources department. Moreover, they provide insurance for functions and tasks existing carried out by the HR team. They also serve as the link between the company and its employees. Also, their work runs from delivering consultation on strategic planning with top executives to recruiting, interviewing, and hiring new staff.

They hire the best employees in the market and assist them to work efficiently and effectively to take the company to an enormous position in the competitive market. Therefore, they hold a very important position in the firm they work in. Any changes that are to be made in the company are first analyzed by them and their approval will only allow the employees to execute the plans. Moreover, we'll discuss the future scope and opportunities of Human Resource Management in 2022.

### **Career Prospects in Human Resource Management**

Understanding the importance and the great demand of a Human Resource Manager, it is really necessary to choose the correct study path to persevere your dreams. The internet is loaded with various online certification courses but deciding the best for you that feeds all your requirements is an essential step to take. Therefore, we are here along with our experts who conduct special research and analyses data to bring you the best jobs and career opportunities in Human Resource Management in 2022.

#### ***1. HR Director:***

The HR director is the one who oversee all Human Resource aspects such as handling employee relations, managing budgets, assessing staffing needs, designing training programs, and developing compensation plans for a company's operation. Moreover, HR Director is rising above all jobs in the human resources field. There is always a need of data analysis, benefits creation, remote work development, and strategy building, etc. Therefore, this is one of the best career options for you.

**Salary:** INR 26 Lakhs per annum

#### ***2. Senior Executive HR:***

These professionals oversee the recruitment process, designing company policies and setting objectives for the HR team. You're ought to have good strategy making skills to attain reputation in the company and increase your market value and chances if promotion. Moreover, it is a great

career. But an HR executive has many roles and responsibilities and to perform them, they also need quite a lot of skills. Therefore, you should have strong basics and a formal education from a good institution.

**Salary:** INR 2.4 Lakhs per annum

### ***3. HR Administrator:***

HR Administrator is the person who handle all the critical role in the company and is responsible for organize and maintain personnel records, updating internal databases, prepare HR documents, like employment contracts and new hire guides. Moreover, working as a HR Administrator is a very rewarding career. As HR administrator is the first point of contact within a company for all HR-related inquiries so you're expected to have great skills.

**Salary:** INR 3.4 Lakhs per annum

### ***4. HR Associate:***

HR associates are responsible for obtaining, recording, and interpreting human resources information within a company. They are tasked with managing corporation human resources records and assisting new employees with enrollment procedures. If you're just beginning with your career in this field then this is the best career opportunity for you to gain expertise and experience for higher posts and increase your promotion and growth chances in the future.

**Salary:** INR 3 Lakhs per annum

### ***5. HR Analyst:***

These professionals all the tasks related to HR analytics for an organization. They identify HR related issues and work to solve them. Moreover, they are also responsible for creating organisations policies and objectives. Analysing and evaluating data and reports are their key tasks. These professionals are in great demand as they help large organizations streamline their human resource operations and play a key role in increasing the efficiency of an organization.

**Salary:** INR 4.3 Lakhs per annum

Now, let's look at the salary trends of various Human Resource jobs. You can see that with increase in experience and skillset the position of an HR increases and so do their salary. Therefore, if you're looking up to build a career in this field this is the right time for you to start your journey

