

Project Report Template

1 INTRODUCTION

1.1 Overview

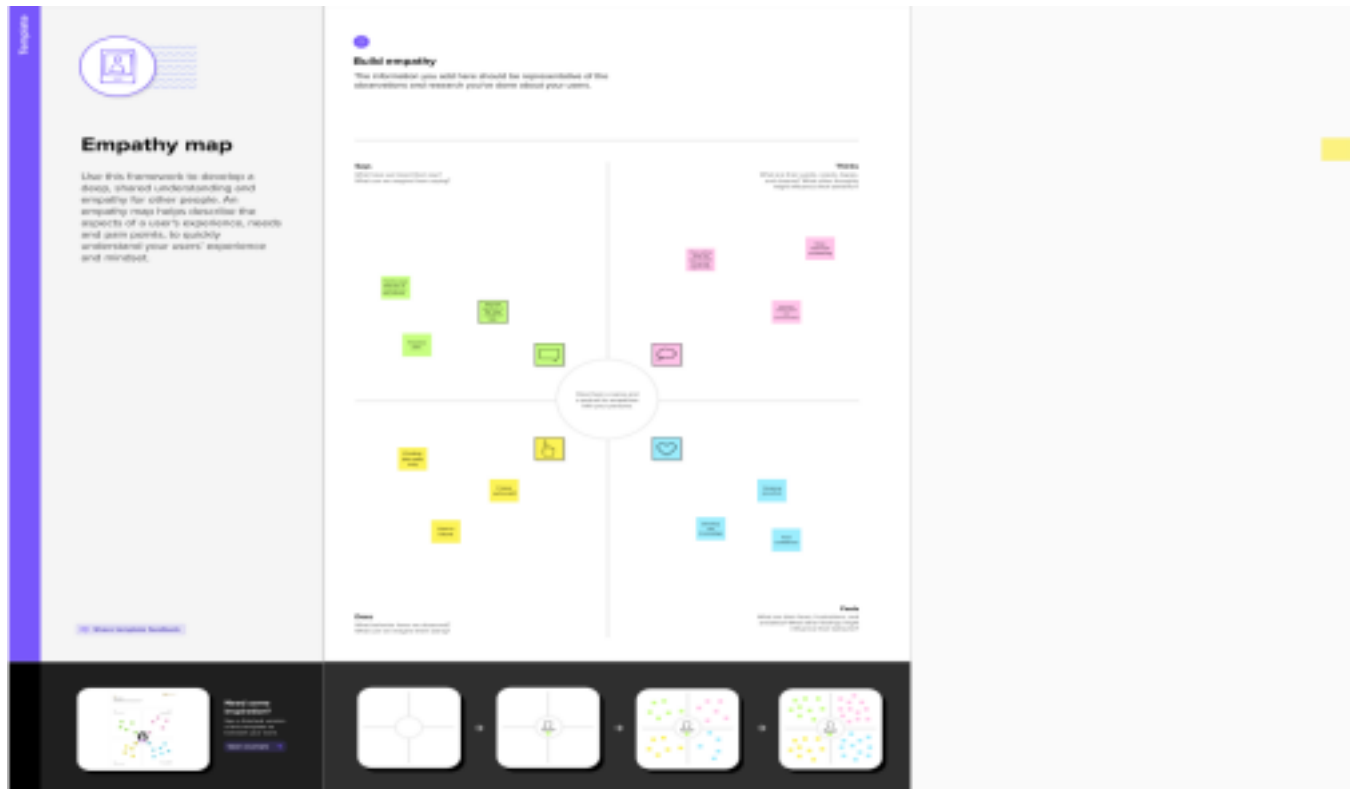
In this project we use custom objects , relationships ,page layouts to give the HR team easy access to data they need on an existing recruitment app.

1.2 Purpose

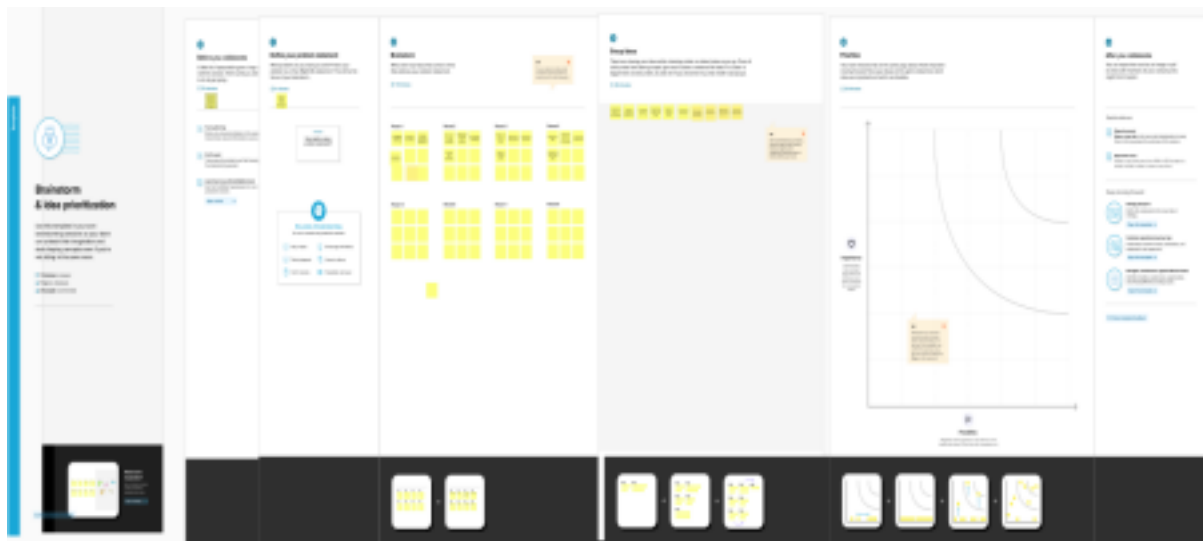
To make the existing app more efficient for the HR team we create custom objects and relationships to store and access the data more efficiently . We install an unmanaged package in the org to metadata that acts as existing data in the recruitment app.

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
-------------	----------------------

obj1 : Job posting site	Field label Data type 1.job posting site Auto number
obj2: Review	Field label Data type Review Auto number

3.2 Activity & Screenshot

Milestone 1: Creation of developer account



Activity-1

A Developer org has all the features and licenses you need to get started with Salesforce

1. Search Developer.salesforce.com
2. Enter the following details like First name, last name, Email, Role, Company,

Country/Region, Postal code, and Username must be unique.

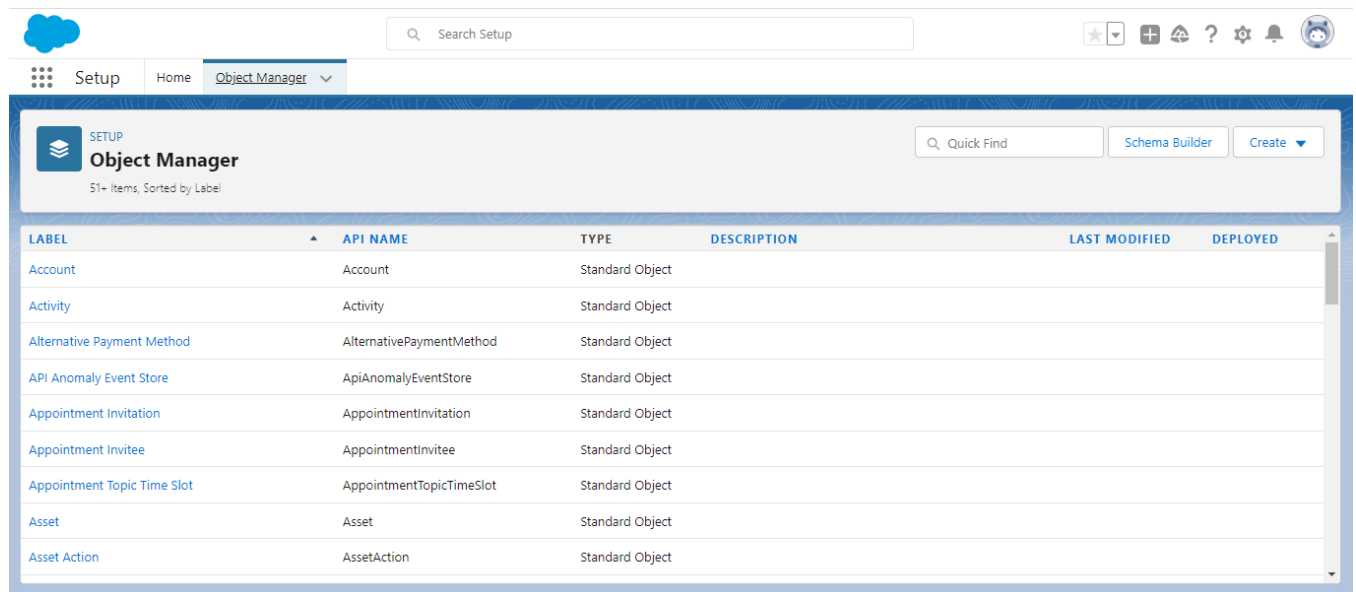
3. Click sign me up, After a few min you will receive a mail salesforce org and by using the verify account link you can create your new password.

4. Click save.

5. Search login.salesforce.com

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

Milestone 2 : Package installation.



The screenshot displays the Salesforce Object Manager interface. At the top, there is a navigation bar with the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Object Manager' tab is selected. The main content area shows a table of standard objects. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed are Account, Activity, Alternative Payment Method, API Anomaly Event Store, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, and Asset Action.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard 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.
2. Click create, select custom object.
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 select these options: Add Notes and Attachments related list to default page layout Launch New Custom Tab Wizard after saving this custom object

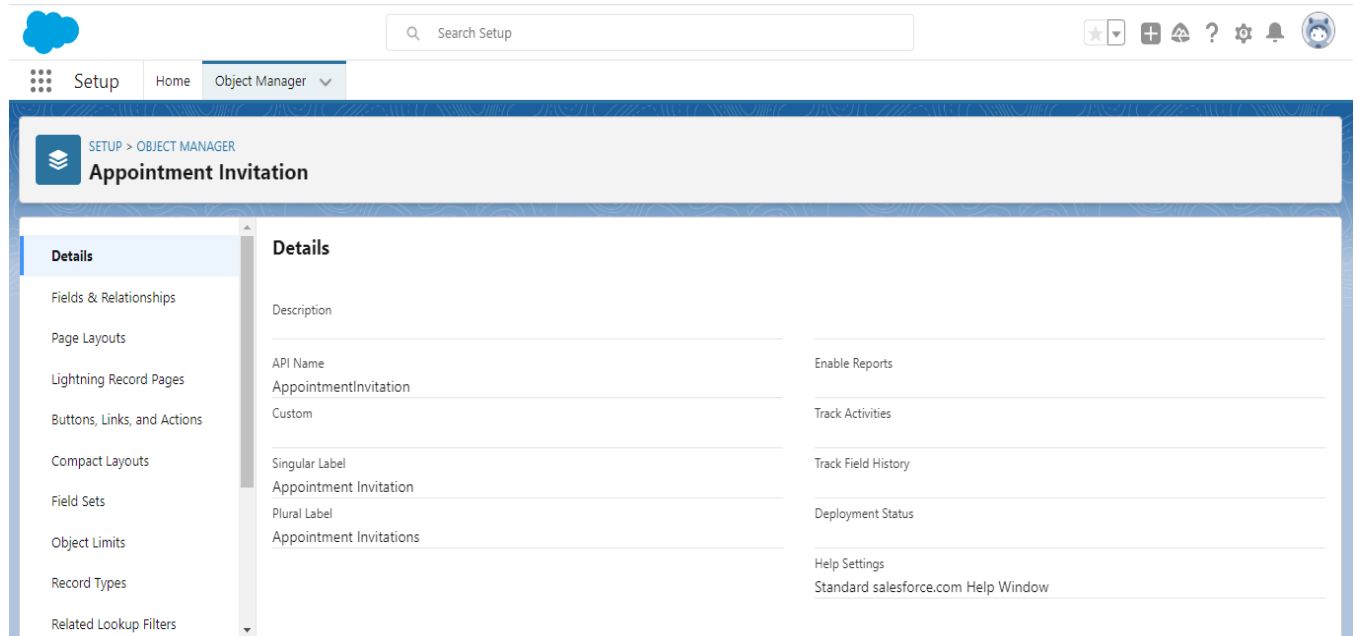
Milestone 3: Object

Salesforce objects are of two types:

- **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Activity-1

Create a custom object for Job Posting Site



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 "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 select these options:
Add Notes and Attachments related list to default page layout
Launch New Custom Tab Wizard after saving this custom object
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.

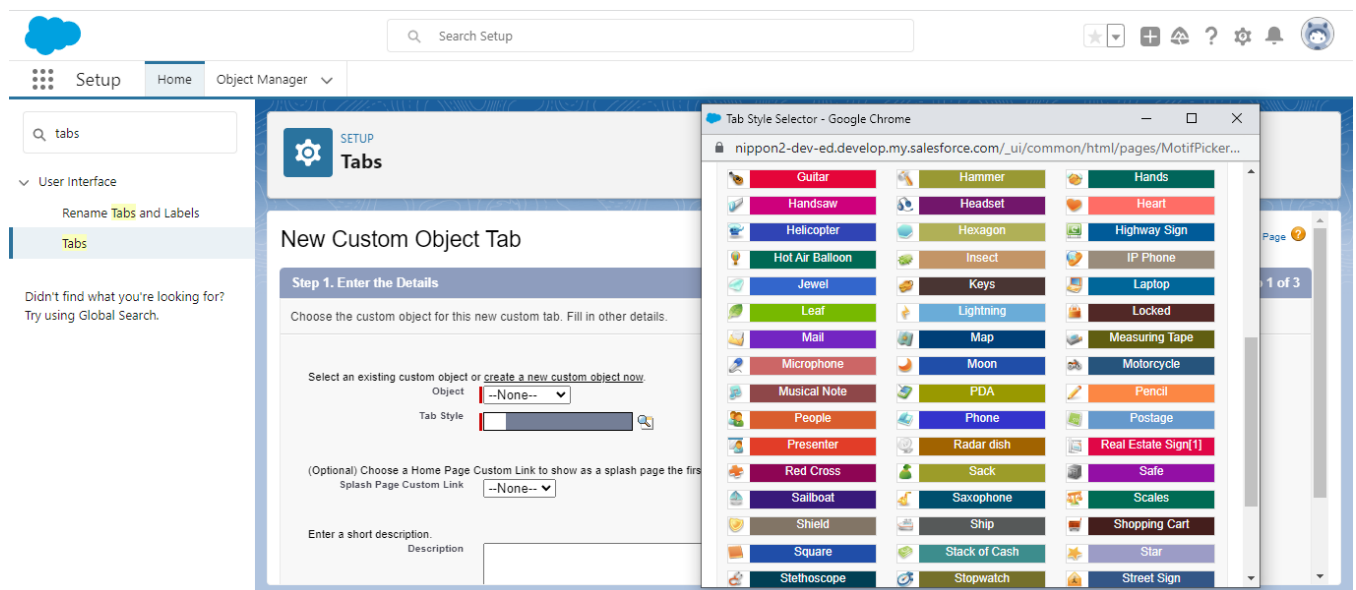
10. In the Object Creation Options section, select select these options:

Add Notes and Attachments related list to default page layout

Launch New Custom Tab Wizard after saving this custom object

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

Milestone 4 : Tabs



Activity : 1

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.

Milestone 5 : Fields

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar and navigation icons. Below the navigation bar, the 'Object Manager' tab is selected. The main content area is titled 'job posting site' and shows the 'Custom Object Definition Edit' form. The form includes fields for 'Label' (job posting site), 'Plural Label' (job posting sites), 'Object Name' (job_posting_site), and a 'Description' field. A sidebar on the left lists various setup options like 'Fields & Relationships', 'Page Layouts', and 'Lightning Record Pages'.

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.
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

1. Status
2. Technical site
3. Description

Milestone 6 : Junction Object

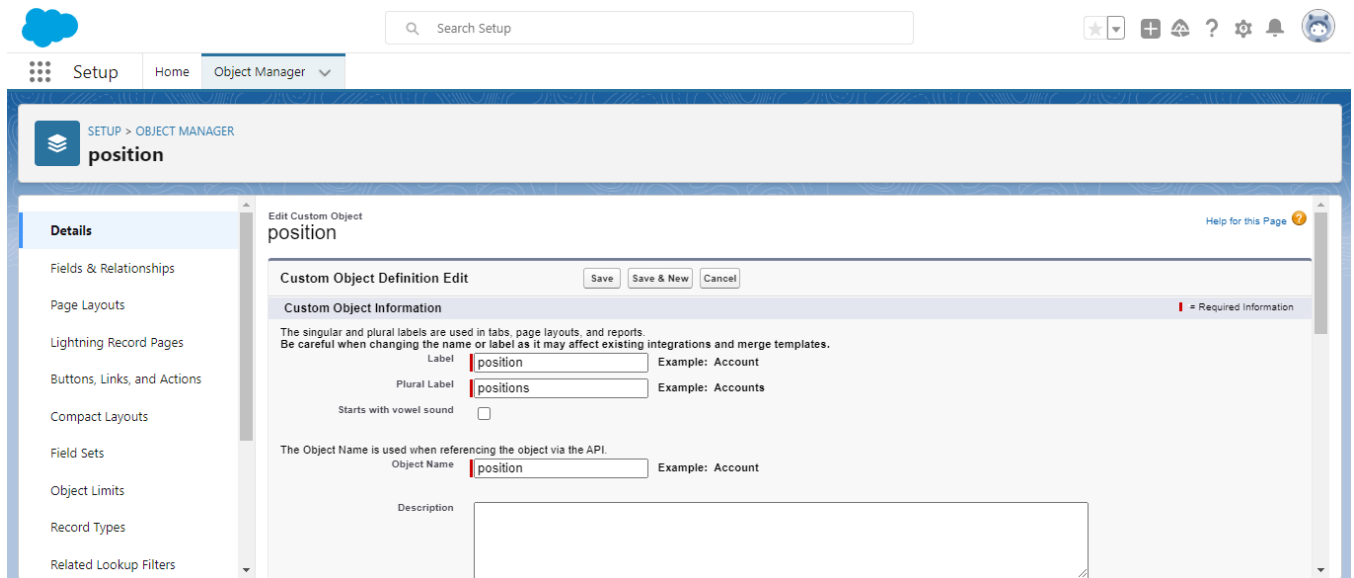
The screenshot shows the Salesforce Setup interface. At the top, there's a search bar and navigation icons. Below the navigation bar, the 'Object Manager' tab is selected. The main content area is titled 'job posting' and shows the 'Custom Object Definition Edit' form. The form includes fields for 'Label' (job posting), 'Plural Label' (job postings), 'Object Name' (job_posting), and a 'Description' field. There are also checkboxes for 'Starts with vowel sound' and 'Compact Layouts'. The form is divided into sections: 'Custom Object Information' and 'Field Sets'. The 'Label' field is highlighted with a red box.

Activity : 1

Creating a custom junction object

1. From setup, click object Manager.
2. Click create, select custom object.
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
9. Leave everything else as is, and click save.

Milestone 7: Page Layout



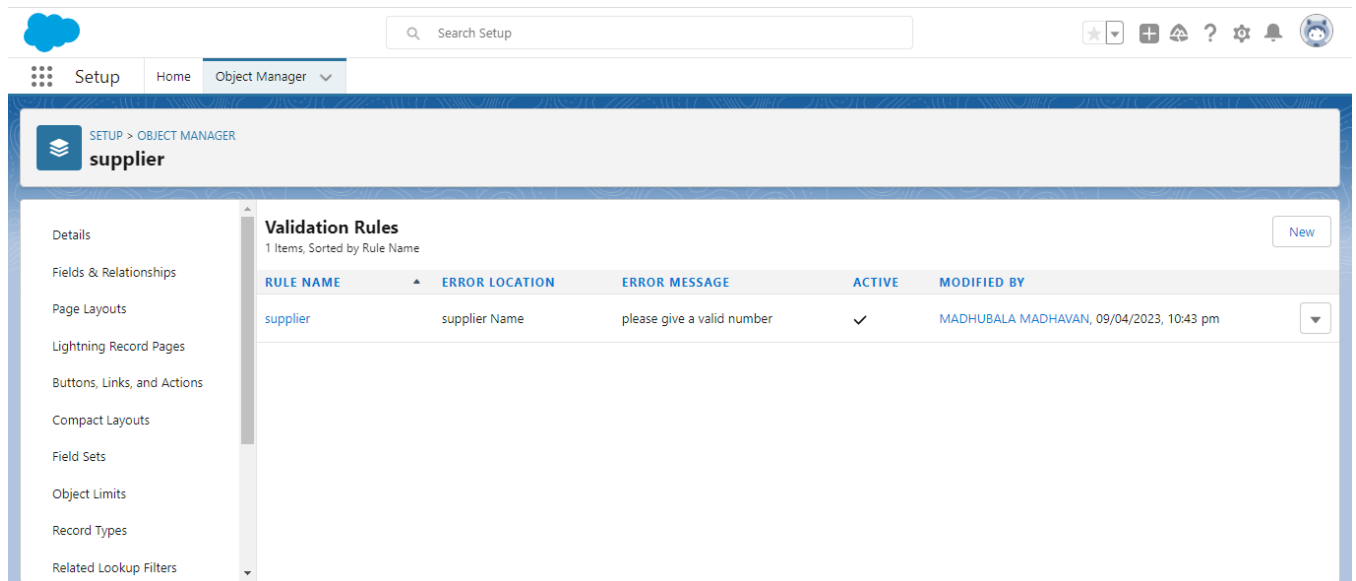
Activity-1

Modifying the page layouts :

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

Milestone 8 : Validation Rules



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar shows the Setup menu with 'Object Manager' selected. The main content area displays the 'Validation Rules' for the 'supplier' object. The page title is 'SETUP > OBJECT MANAGER supplier'. The 'Validation Rules' section shows 1 item, sorted by Rule Name. The table below lists the validation rule details.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
supplier	supplier Name	please give a valid number	✓	MADHUBALA MADHAVAN, 09/04/2023, 10:43 pm

Activity –1

Creating a Validation Rule:

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

Milestone 9 : Profile

The screenshot displays the Salesforce Setup interface for the 'Profiles' section. The left-hand navigation pane shows 'Setup' with 'Profiles' highlighted under the 'Users' category. The main content area, titled 'Profiles', features a search bar at the top and a table of existing profiles. The table columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The profiles listed are: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter External User, Chatter Free User, Chatter Moderator User, and Contract Manager. At the bottom of the table, it indicates '1-25 of 41' profiles and '0 Selected'.

Activity

Creation on profile:

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

Milestone 10: User

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Users' is selected under 'User Management Settings'. The main content area is titled 'All Users' and includes a search bar and a list of users. The list has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The following table represents the data shown in the screenshot:

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Gupta_Sanjay	Sanj	griyanoarivanga543@gmail.com@gmail.com		✓	Standard Platform User
Edit	MADHAVAN_MADHUBALA	MRala	madhu@madhu.madhu		✓	System Administrator
Edit	Madhavan_Madhubala	Madhu	mathumathavan.bala@gmail.com		✓	Event user profile
Edit	User_Integration	integ	integration@00d2w00000rhofseal.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d2w00000rhofseal.com		✓	Analytics Cloud Security User

Activity-1

Creating a User:

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

- First Name: Sanjay
- Last Name: Gupta
- Alias: Sanj
- Email: provide your personal email id for future reference

Username: sanjaygupta@thesmartbridge.com

- Nickname: Sanju
- Role: leave it as default

- User License: Salesforce
- Profile: Event User Profile

Milestone 11 : Permission set

Search Setup

Setup Home Object Manager

Q permission sets

Users

Permission Sets

Didn't find what you're looking for?
Try using Global Search.

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

Action	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User

1-25 of 27 0 Selected

Page 1 of 2

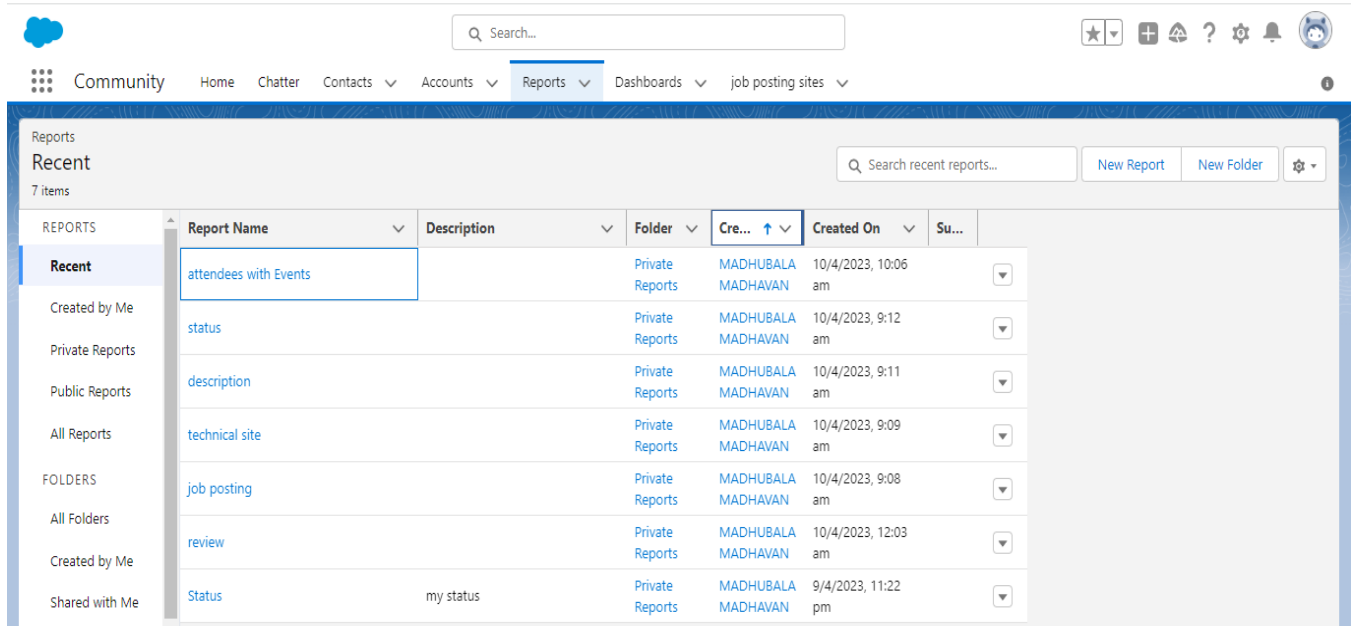
Activity-1

Creating a Permission Set:

1. From setup search “permission sets” in quick find and select permission set then click on New.
2. Enter label as: Supplier Permits 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

Milestone 12: Reports

Activity-1



The screenshot shows the Salesforce Reports interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu is visible, with the 'Reports' tab selected. The 'Reports' page shows a list of recent reports under the 'Recent' tab. The table below lists the reports:

REPORTS	Report Name	Description	Folder	Cre...	Created On	Su...
Recent	attendees with Events		Private Reports	MADHUBALA MADHAVAN	10/4/2023, 10:06 am	
Created by Me	status		Private Reports	MADHUBALA MADHAVAN	10/4/2023, 9:12 am	
Private Reports	description		Private Reports	MADHUBALA MADHAVAN	10/4/2023, 9:11 am	
Public Reports	technical site		Private Reports	MADHUBALA MADHAVAN	10/4/2023, 9:09 am	
All Reports	job posting		Private Reports	MADHUBALA MADHAVAN	10/4/2023, 9:08 am	
FOLDERS	review		Private Reports	MADHUBALA MADHAVAN	10/4/2023, 12:03 am	
All Folders	Status	my status	Private Reports	MADHUBALA MADHAVAN	9/4/2023, 11:22 pm	
Created by Me						
Shared with Me						

Reports:

1. From the Reports tab, click New Report.
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.

4 Trailhead Profile Public URL

Team Lead - [https:// trailblazer.me/id/madhu2003](https://trailblazer.me/id/madhu2003)

Team Member 1 -[https:// trailblazer.me/id/priyc13](https://trailblazer.me/id/priyc13)

Team Member 2 -[https:// trailblazer.me/id/princ544](https://trailblazer.me/id/princ544)

Team Member 3 -[https:// trailblazer.me/id/naveen100503](https://trailblazer.me/id/naveen100503)

5 ADVANTAGES & DISADVANTAGE

Advantages:

1. Provides higher quality candidates ensures faster hiring
2. Helps hire applicant with specialist knowledge promotes business growth and innovations .

Disadvantages:

1. Requirements may stagnate the company culture.
2. Increase training costs of the new applicants requirements agencies have limited choice may leads to workspace hostility .

APPLICATIONS

An human resource management app is a technology that helps you automate and simplify your complex HR processes and manage them without any human Intervention.

Prime pay is a one stop payroll and HR provider purposely designed to meet the specific people management needs of growing business.

6 CONCLUSION

Requirements is necessary for any organization as it Brit new employee with new ideas and challenges the existing workspace with an old mind set .

7 FUTURE SCOPE

1. There will be a need for specialist in area of data analysis , benefits, creation, remote work development and strategy building.
2. The HR industry will have been able to use technology and people analytics to move towards thought leadership.