


UCI 1029

Salesforce Administration Capstone

Nana Akua Amankwah
July 16, 2024



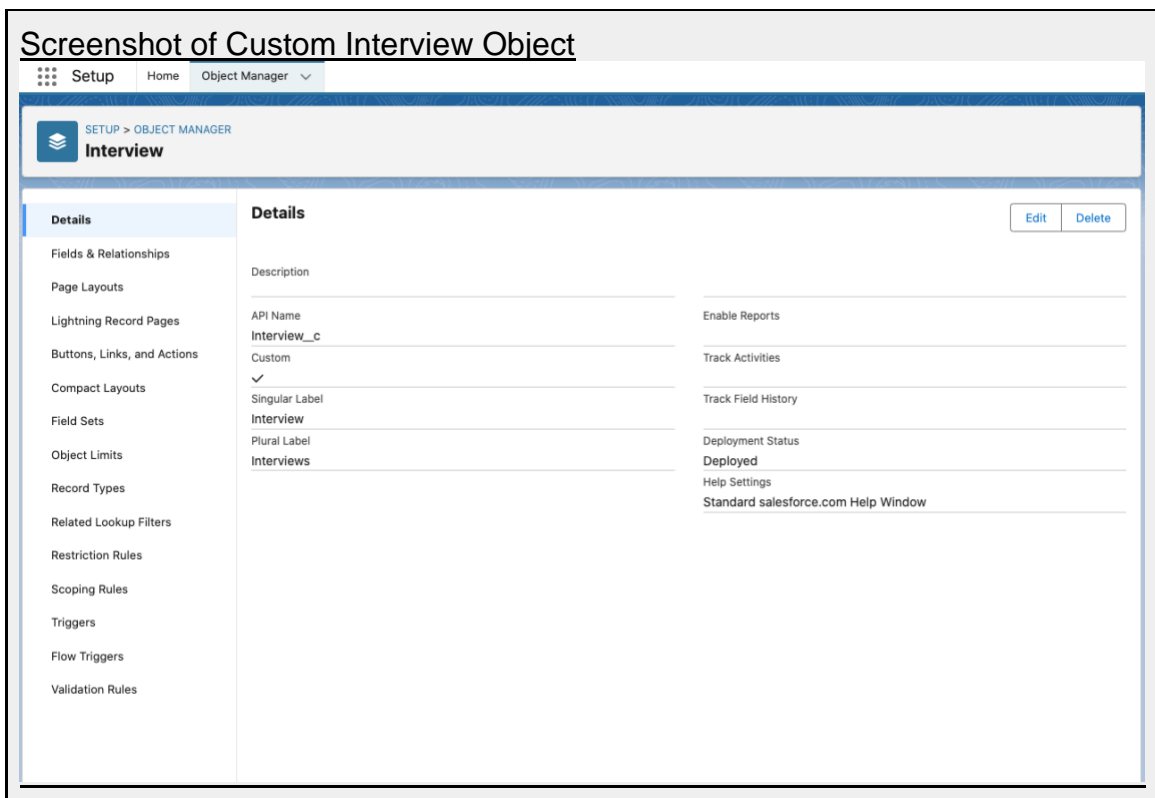
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Introduction

As a Junior Salesforce Administrator, my key role includes customizing Salesforce to fit Cirrus HR Solutions' organizational needs. This is not limited to creating custom objects, fields, page layouts and record types. The purpose of this report is to help the end users analyze data, gain better insights, and make informed business decisions. This report will include creating custom object, customize the user experience, managing data and security, automation, normalizing and importing data as well as creating reports and dashboards.

Section 1: Custom Object

- To create the custom Interview Object Navigate to Setup -> Object Manager -> Create -> Custom Object.
- Name: Interview
- Fields:
 - Applicant Name: Field Type - Text
 - Interview Stage: Field Type - Picklist (Values: Application Received, Resume Review, Schedule Interview, Interview, Applicant Review, Recommend, Do Not Recommend)
 - Application Received Date: Field Type - Date
 - Resume Review Date: Field Type - Date
 - Interview Scheduled Date: Field Type - Date
 - Interview Date: Field Type - Date
 - Review Date: Field Type - Date
 - Recommendation: Field Type - Checkbox
 - Score: Field Type - Number (0-100)
 - Contact: Field Type - Lookup (Contact)



Screenshot of Custom Interview Object

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Interview

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

14 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Applicant Name	Applicant_Name__c	Text(50)		
Application Received Date	Application_Received_Date__c	Date		
Contact	Contact__c	Lookup(Contact)		✓
Created By	CreatedById	Lookup(User)		
Interview Date	Interview_Date__c	Date		
Interview Name	Name	Text(80)		✓
Interview Scheduled Date	Interview_Scheduled_Date__c	Date		
Interview Stage	Interview_Stage__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Recommendation	Recommendation__c	Checkbox		
Resume Review Date	Resume_Review_Date__c	Date		
Review Date	Review_Date__c	Date		
Score	Score__c	Number(3, 0)		

Path Setting

← → ↻

creative-impala-s2ckro-dev-ed.trailblaze.lightning.force.com/setup_sales_pathassistant/paSetupWizard.app?req...

☆ ⚙ ⬇ 🖨 🌐

Relaunch to update

salesforce

Setup

Step 3: Activate Your Path and Enable Celebrations

Activate Your Path

When you activate your path, key fields and guidance appear in Kanban for the same object, record type, and picklist. Not ready to make this path available? Save it, and activate it later.

Enable Celebrations

When users reach a specific step in the path, help them celebrate their success with on-screen confetti. Confetti appears in paths and kanban views.

Picklist Values

Available

Selected for Celebration

Application Received

Resume Review

Schedule Interview

Interview

Applicant Review

Recommend

Do Not Recommend

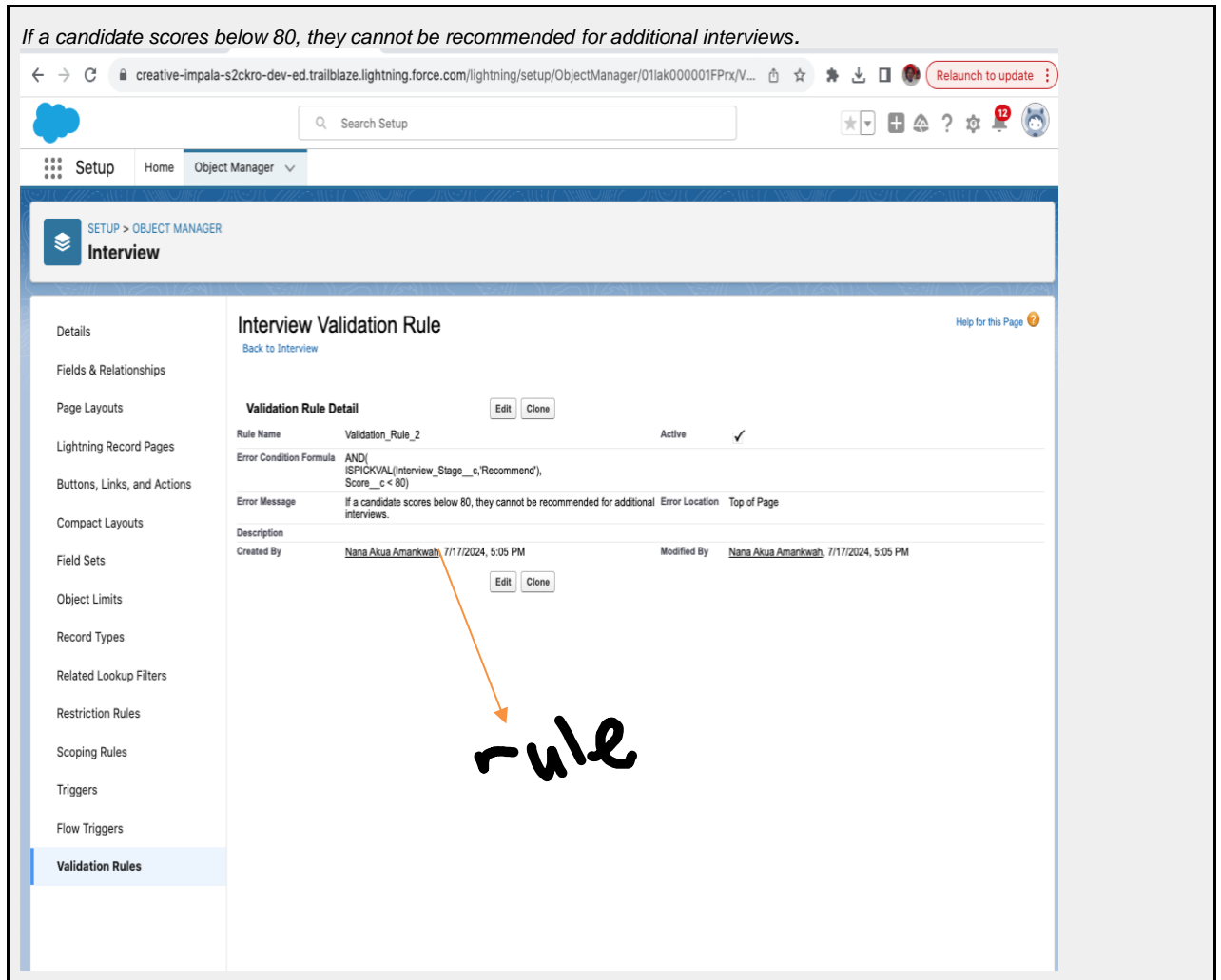
Celebration Frequency

☐ Rarely

☐ Sometimes

☐ Often

☒ Always



Section 2: Customize the User Experience

- ❑ Navigate to Setup -> Account Settings -> Enable "Allow users to relate a contact to multiple accounts".
 - Add Related Accounts related list to the Contact page layout.
- ❑ Customize Page Layouts:
 - Modify the Contact page layout to display record details prominently by dragging the record details section above related lists.
 - Ensure the Interviews related list is added to the Contact page layout and allows attachments.
- ❑ Create Object-Specific Actions:
 - Navigate to Setup -> Object Manager -> Contact -> Buttons, Links, and Actions -> New Action.
 - Action Type: Create a Record

- Target Object: Interview
- Label: New Interview
- Add fields: Applicant Name, Interview Stage, Resume Received.
- Add this action to the Contact page layout under Salesforce Mobile and Lightning Experience Actions.

Contacts should be able to be associated with more than one Account, and easily visible from the Account record.

creative-impala-s2ckro-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/01ak000001FJ8D/FieldsAndRelationships/00Nak00...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Interview Object

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Interview Object Custom Field
Contact record
[Back to Interview Object](#)

[Validation Rules](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Contact record	Object Name	Interview Object
Field Name	Contact_record	Data Type	Lookup
API Name	Contact_record__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Nana Akua Amankwah, 7/17/2024, 11:27 AM	Modified By	Nana Akua Amankwah, 7/18/2024, 6:37 AM

Lookup Options

Related To	Interview Object	Child Relationship Name	Interview_Object
Related List Label	Interview Object		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Lookup Filter
No lookup filters defined.

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

[Back To Top](#) Always show me [more](#) records per related list

Record details of a Contact first.

The screenshot shows the Salesforce Setup interface for configuring a custom field named 'Contact' on the 'Interview' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.

The main content area is titled 'Interview Custom Field Contact' and includes a 'Back to Interview' link. It features several tabs: 'Details' (selected), 'Validation Rules', 'Custom Field Definition Detail', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab is active, showing the following information:

- Field Information:**
 - Field Label: Contact
 - Field Name: Contact
 - API Name: Contact__c
 - Description:
 - Help Text:
 - Data Owner:
 - Field Usage:
 - Data Sensitivity Level:
 - Compliance Categorization:
 - Created By: Nana Akua Amankwah, 7/17/2024, 1:37 PM
 - Modified By: Nana Akua Amankwah, 7/17/2024, 1:37 PM
- Lookup Options:**
 - Related To: Contact
 - Related List Label: Interview
 - Required: ☐
 - What to do if the lookup record is deleted?: Clear the value of this field.
 - Child Relationship Name: Interviews
- Lookup Filter:** No lookup filters defined.
- Validation Rules:** No validation rules defined.

At the bottom, there is a 'Back To Top' link and a note: 'Always show me more records per related list'.

From the Contact Record, an HR Representative should be able to create a new Interview Record.

Setup

Home

Object Manager

Search Setup

Relaunch to update

Setup > OBJECT MANAGER

Interview Object

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Interview Object Custom Field

Contact record

Validation Rules

Custom Field Definition Detail

Field Information

Field LabelContact record

Field NameContact_record

API NameContact_record__c

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Object NameInterview Object

Data TypeLookup

Created ByNana Akua Amankwah7/17/2024, 11:27 AM

Modified ByNana Akua Amankwah7/18/2024, 6:37 AM

Lookup Options

Related ToInterview Object

Related List LabelInterview Object

Required

What to do if the lookup record is deleted?Clear the value of this field.

Child Relationship NameInterview_Object

Lookup Filter

No lookup filters defined.

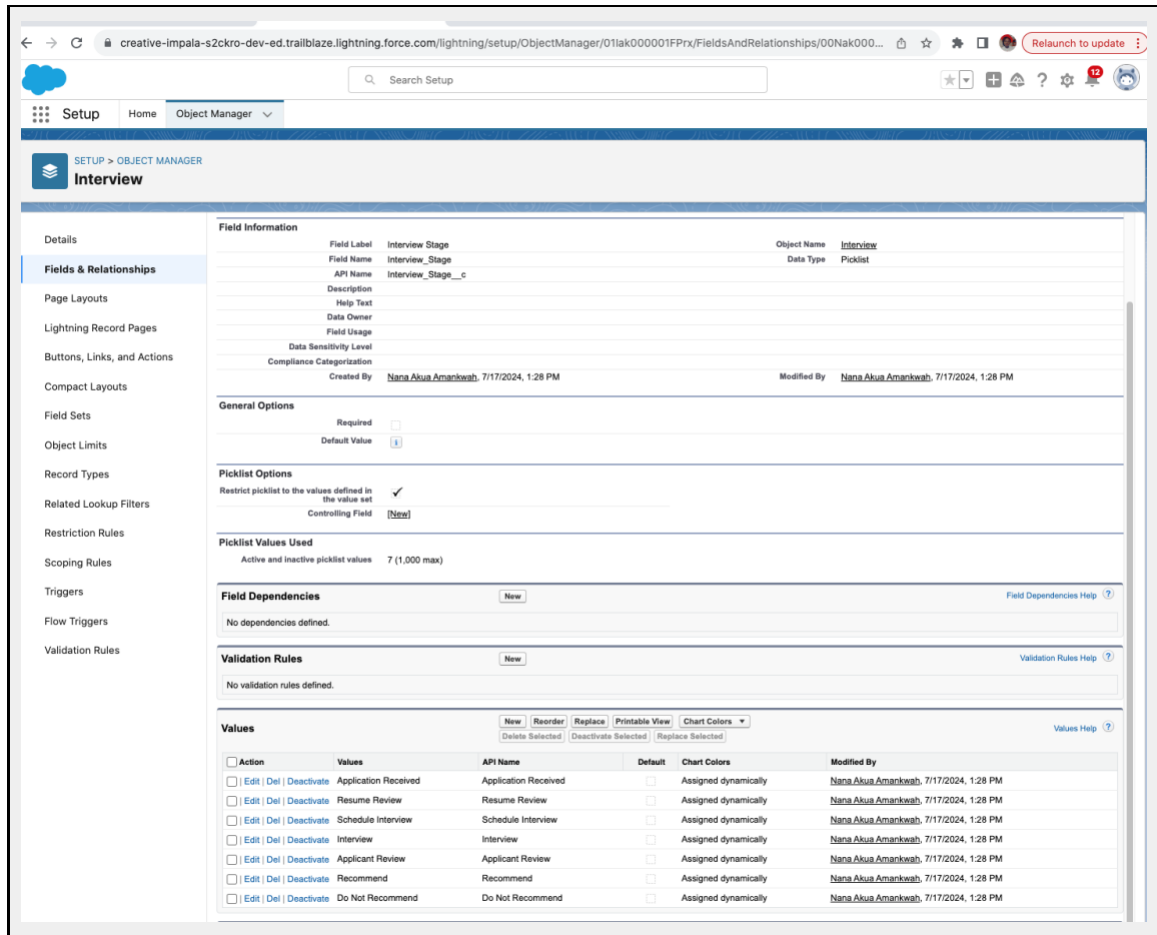
Validation Rules

No validation rules defined.

Back To Top

Always show me more records per related list

Applicant's resume attached to their Interview record for easier review.



Section 3: Data Management and Security

- Set Up Role Hierarchy:
 - Navigate to Setup -> Roles -> Set Up Roles -> New Role.
 - Create roles for HR Representative and Senior HR Manager.
 - Assign users to these roles accordingly.
- Create Custom Profiles and Manage Password Settings:
 - Navigate to Setup -> Profiles -> New Profile.
 - Clone Standard User Profile for HR Representative.
 - Clone System Administrator Profile for Senior HR Manager.
 - Set password policies in Setup -> Password Policies.
 - Senior HR Managers: 30 days reset.
 - HR Representatives: 60 days reset.
 - Configure Org-Wide Defaults in Setup -> Sharing Settings to set appropriate read/edit access.
- Enable Multi-Factor Authentication:
 - Navigate to Setup -> Session Settings -> Multi-Factor Authentication -> Enable MFA for all users.

Senior HR Managers should be able to see all the records of the HR Representatives they supervise.

SETUP

Sharing Settings

Sharing Settings

Help for this Page ?

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

One or more sharing operations has been initiated. See below for additional details. Certain operations may not be available.

Manage sharing settings for: Interview

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults

Organization-Wide Defaults Help ?

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Interview	Public Read Only	Private	<input checked="" type="checkbox"/>

Other Settings

Other Settings Help ?

Manager Groups

☐

Secure guest user record access

☒

Require permission to view record names in lookup fields

☐

Sharing Rules

Interview Sharing Rules

New Recalculate

Interview Sharing Rules Help ?

A sharing rule operation is in progress. You can't create new owner-based sharing rules for Interviews targeting the following groups. The initiating user will receive an email when each operation finishes.

Initiated By	Shared With	Initiated On
Nana Akua Amanikwah	Role: HR Representative	7/18/2024, 7:43 AM

Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Senior HR Manager	Role: HR Representative	Read Only
Edit Del	Owner in Role: Senior HR Manager	Role: Senior HR Manager	Read Only

Sharing Overrides

Profiles That Override Interview Sharing

Sharing Overrides Help ?

Organization-wide permissions affect all objects in the organization. Object permissions affect only the given object.

[Tell me more!](#) [Don't show this message again](#)

Profile	Custom Profile	Organization-Wide Permissions		Interview Permissions	
		View All Data	Modify All Data	View All	Modify All
Analytics Cloud Integration User	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Senior HR Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Administrator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

HR Representatives should not have the ability to delete these records.

SETUP

Sharing Settings

Setup

Interview Sharing Rule

Help for this Page

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Label

HR Representatives

Rule Name

HR_Representatives

Description

HR Representatives should not have the ability to delete these records.

Interview: owned by members of

Role: Senior HR Manager

Share with

Role: HR Representative

Access Level

Read Only

Created By

Nana Akua Amankwah, 7/18/2024, 7:43 AM

Modified By

Nana Akua Amankwah, 7/18/2024, 7:43 AM

Save

Cancel

Password policies

SETUP

Profiles

Data Use Legal Bases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scorecard Associations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Use Purposes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Scorecard Metrics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Digital Wallets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Service Contracts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Duplicate Record Sets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Session Hijacking Event Stores	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Engagement Channel Types	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Solutions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entitlements	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Entitlement Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	User External Credentials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finance Balance Snapshots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Web Cart Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finance Transactions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Work Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gateway Provider Payment Method Types	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Work Plans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Guest User Anomaly Event Stores	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Work Plan Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Work Step Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Images	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Interviews	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Interview Object	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After

2 hours of inactivity

Session Security Level Required at Login

Password Policies

User passwords expire in	30 days
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must include alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/>

Edit

Clone

Delete


View Users

Login Hours

Edit

Login Hours Help ?

Sharing setting(Read only)

 **SETUP**
Sharing Settings

Setup

Interview Sharing Rule

Help for this Page ?

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Label

Rule Name

Description

Interview: owned by members of

Share with

Access Level

Created By

Senior HR Managers

Senior_HR_Managers

Senior HR Managers should be able to see all the records of the HR Representatives they supervise

Role: Senior HR Manager

Role: Senior HR Manager

Read Only

Nana Akua Amankwah, 7/18/2024, 7:37 AM

Modified By

Nana Akua Amankwah, 7/18/2024, 7:37 AM

Save

Cancel

Multi-Factor Authentication

The screenshot shows the 'Permission Sets' setup page in Salesforce. The page title is 'Permission Sets' with a 'SETUP' icon. Below the title, the 'Permission Set' is 'Cirrus HR'. A search bar 'Find Settings...' and buttons 'Clone', 'Delete', 'Edit Properties', 'Manage Assignments', and 'View Summary' are visible. The 'Permission Set Overview' section shows the description: 'They desire for Multi-Factor Authentication for everyone that directly logs into the Salesforce Org'. The API Name is 'Cirrus_HR'. The License is 'Salesforce'. The Namespace Prefix is 'Nana Akua Amankwah'. The Session Activation Required checkbox is checked. The Permission Set Groups Added To is 0. The Created By is 'Nana Akua Amankwah' on 7/18/2024, 8:19 AM. The Last Modified By is 'Nana Akua Amankwah' on 7/18/2024, 8:34 AM. The 'Apps' section lists various permissions: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, Flow Access, Named Credential Access, External Credential Principal Access, Custom Permissions, Custom Metadata Types, Custom Setting Definitions, Organization-Wide Email Address Access, and Standard Invocable Action Type Access. A link 'Learn More' is provided for settings that apply to Salesforce apps.

Permission Set Overview

Field	Value
Description	They desire for Multi-Factor Authentication for everyone that directly logs into the Salesforce Org
API Name	Cirrus_HR
License	Salesforce
Namespace Prefix	Nana Akua Amankwah
Session Activation Required	<input checked="" type="checkbox"/>
Permission Set Groups Added To	0
Created By	Nana Akua Amankwah, 7/18/2024, 8:19 AM
Last Modified By	Nana Akua Amankwah, 7/18/2024, 8:34 AM

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

Named Credential Access
Permissions to authenticate against named credentials

External Credential Principal Access
Permissions to authenticate with external credential principal mappings

Custom Permissions
Permissions to access custom processes and apps

Custom Metadata Types
Permissions to access custom metadata types

Custom Setting Definitions
Permissions to access custom settings

Organization-Wide Email Address Access
Permissions to send email with organization-wide email address

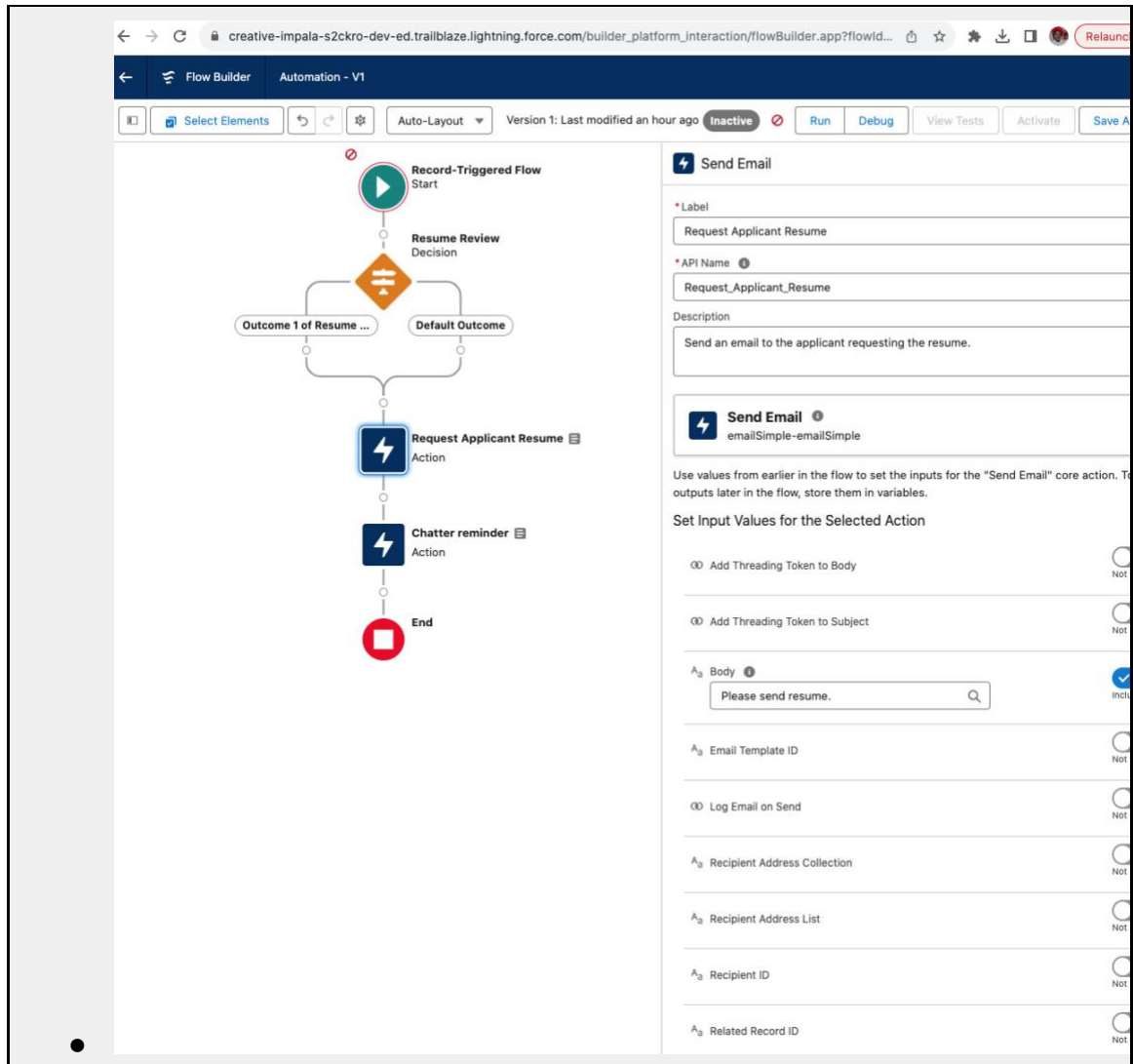
Standard Invocable Action Type Access
Permissions to access invocable actions

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Section 4: Automation

Create Record-Triggered Flow:

- Navigate to Setup -> Flows -> New Flow -> Record-Triggered Flow.
- Trigger the flow when a record is created or updated.
- Add a Decision element to check if the Interview stage is "Resume Review" and the resume is not submitted.
- Add an Action element to send an email to the applicant requesting the resume.
- Add another Action element to post a Chatter reminder to the HR Representative if the resume is available for review.



Section 5: Data Normalization and Import

Normalize and Import Data:

- Clean the data in the provided Google Sheet to ensure consistency (e.g., correct date formats, remove duplicates).
- Use Data Loader to import normalized data into Salesforce.
- Provide proof of import with screenshots of Data Loader job results and example records in Salesforce.
- Upload the normalized data .CSV files as part of the deliverables.

Data Normalization and Import.

https://docs.google.com/spreadsheets/d/1wgUUuUC1ctDUq5TsatFMmCGr96ic9N6EG0vy1yrWnFs/edit?usp=drive_link

Data Loader

dataloader.io NEW TASK UPGRADE Info Help Center nas.amankwah@creative-impala-s2ckro.com

Quick find... All Imports Exports Deletes Scheduled History

Interview Insert_0718_2024-02_21_26_success

View Zoom 125% Add Category Insert Table Chart Text Shape Media Comment Collaborate Format Organize

STATUS	COMMENTS	ID	Account Name	Names	Email	Phone
ITEM Insert		a01ak00000QGsWPAA1	Rainy Day Security	Michael Brown	michael.brown@example.com	567-890-1234
ITEM Insert		a01ak00000QGsWQAA1	Stratosphere Software	Sarah Miller	sarah.miller@example.com	890-123-4567
ITEM Insert		a01ak00000QGsWRAA1	Stratosphere Software	Sophia Nguyen	sophia.nguyen@example.com	567-890-1234
ITEM Insert		a01ak00000QGsWSAA1	Cloudy Development Agency	William Smith	william.smith@example.com	678-901-2345
ITEM Insert		a01ak00000QGsWTAA1	Stratosphere Software	Ashley Martinez	ashley.martinez@example.com	(456)-789-0123
ITEM Insert		a01ak00000QGsWUAA1	Cloudy Development Agency	Matthew Anderson	matthew.anderson@example.com	5678901234
ITEM Insert		a01ak00000QGsWVAA1	Cumulus IT Support	Stephanie Hernandez	stephanie.hernandez@example.com	345-678-9012
ITEM Insert		a01ak00000QGsWWAA1	Cloudy Development Agency	Joshua Gonzalez	joshua.gonzalez@example.com	456-789-0123
ITEM Insert		a01ak00000QGsWXAA1	Cumulus IT Support	Rachel Carter	rachel.carter@example.com	1234567890
ITEM Insert		a01ak00000QGsWYAA1	Cumulus IT Support	Nicholas White	nicholas.white@example.com	234-567-8901

Sheet Name: Sheet 1

Background: [Color Picker]

Duplicate Sheet

Delete Sheet

Section 6: Reports and Dashboards

reports

<div><div><div></div><div>Interview</div></div><div>Accounts</div><div>Contacts</div><div>Home</div><div>Dashboards</div><div>Reports</div><div>Chatter</div><div>Intervi</div></div> <div></div>				
<div><div><div></div><div>Report: Interviews</div></div><div>Interview Scores Re</div></div>				
<div><div>Total Records</div><div>Total Score</div><div>10</div><div>813</div></div>				
	Interview: Interview Name	Applicant Name	Score	Interview Stage
1	a01ak00000QGsWP	04/25/2024	80	-
2	a01ak00000QGsWQ	05/01/2024	88	-
3	a01ak00000QGsWR	05/25/2024	82	-
4	a01ak00000QGsWS	05/30/2024	65	-
5	a01ak00000QGsWT	05/25/2024	77	-
6	a01ak00000QGsWU	05/30/2024	93	-
7	a01ak00000QGsWV	05/20/2024	90	-
8	a01ak00000QGsWW	05/25/2024	76	-
9	a01ak00000QGsWX	04/20/2024	84	-
10	a01ak00000QGsWY	04/25/2024	78	-
11			813	

<div> <div> <div></div> <div>Interview</div> </div> <div>Accounts</div> <div>Contacts</div> <div>Home</div> <div>Dashboards</div> <div>Reports</div> <div>Chatter</div> <div>Interview Object</div> </div>			
<div> <div> <div></div> <div>Report: Interviews</div> </div> <div>Certified Interview Report</div> </div>			
Total Records		Total Recommendation	
10		10	
	Interview: Interview Name	Applicant Name	Recommendation
1	a01ak00000QGsWP	04/25/2024	<input checked="" type="checkbox"/>
2	a01ak00000QGsWQ	05/01/2024	<input checked="" type="checkbox"/>
3	a01ak00000QGsWR	05/25/2024	<input checked="" type="checkbox"/>
4	a01ak00000QGsWS	05/30/2024	<input checked="" type="checkbox"/>
5	a01ak00000QGsWT	05/25/2024	<input checked="" type="checkbox"/>
6	a01ak00000QGsWU	05/30/2024	<input checked="" type="checkbox"/>
7	a01ak00000QGsWV	05/20/2024	<input checked="" type="checkbox"/>
8	a01ak00000QGsWW	05/25/2024	<input checked="" type="checkbox"/>
9	a01ak00000QGsWX	04/20/2024	<input checked="" type="checkbox"/>
10	a01ak00000QGsWY	04/25/2024	<input checked="" type="checkbox"/>
11			10

Interview

Accounts

Contacts

Home

Dashboards

Reports

Chatt

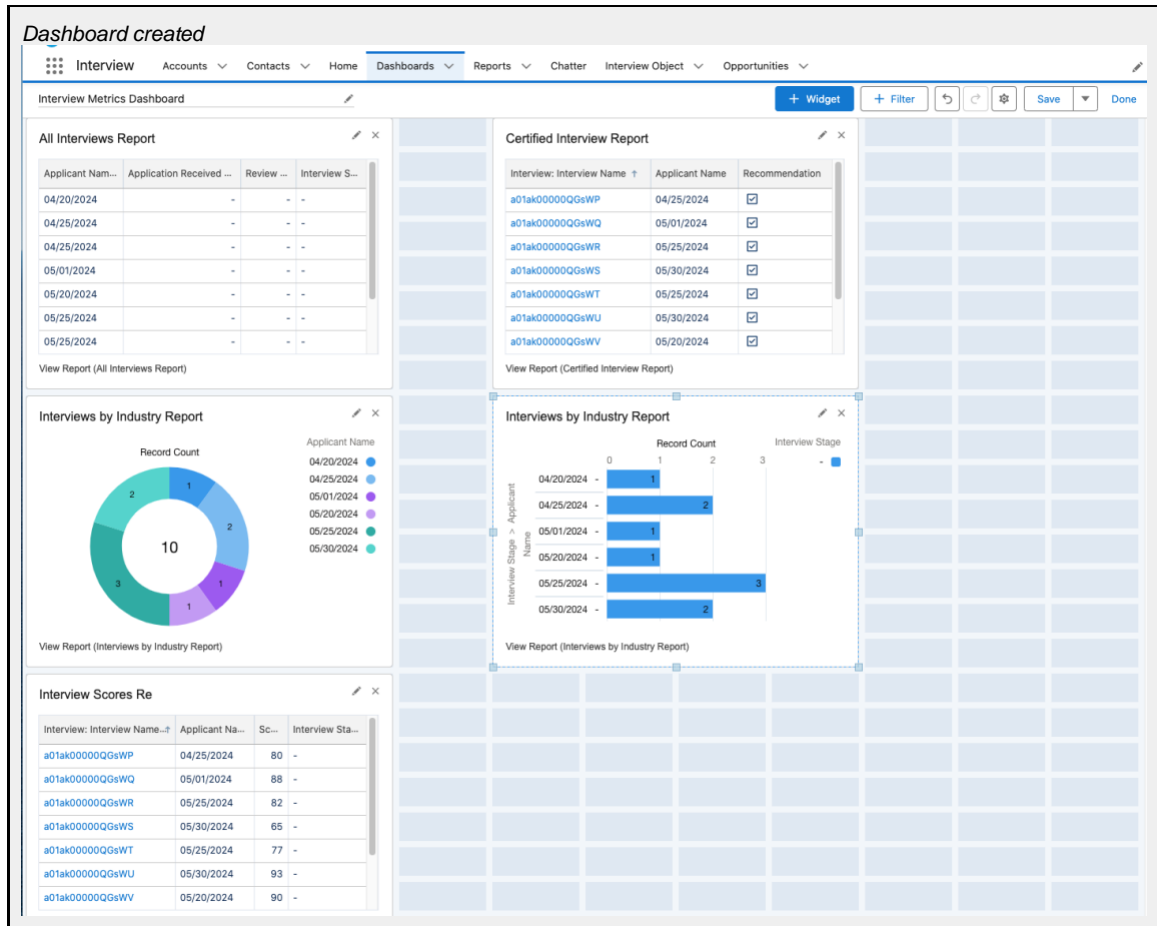
Report: Interviews

Interviews by Industry Report

Total Records

10

<input type="checkbox"/> Applicant Name <div>↑</div> <div>▼</div>	Interview Stage <div>↑</div> <div>▼</div>	Interview: Interview Name <div>▼</div>
<input type="checkbox"/> 04/20/2024 (1)	- (1)	a01ak00000QGsWX
	Subtotal	
Subtotal		
<input type="checkbox"/> 04/25/2024 (2)	- (2)	a01ak00000QGsWP
		a01ak00000QGsWY
	Subtotal	
Subtotal		
<input type="checkbox"/> 05/01/2024 (1)	- (1)	a01ak00000QGsWQ
	Subtotal	
Subtotal		
<input type="checkbox"/> 05/20/2024 (1)	- (1)	a01ak00000QGsWV
	Subtotal	
Subtotal		
<input type="checkbox"/> 05/25/2024 (3)	- (3)	a01ak00000QGsWR
		a01ak00000QGsWT
		a01ak00000QGsWW
	Subtotal	
Subtotal		
<input type="checkbox"/> 05/30/2024 (2)	- (2)	a01ak00000QGsWS
		a01ak00000QGsWU
	Subtotal	
Subtotal		
Total (10)		



Section 7: Custom Application

Create a Custom Lightning App:

- Navigate to Setup -> App Manager -> New Lightning App.
- Include objects: Accounts, Contacts, Interviews, Tasks, Calendar.
- Set the Dashboard as the home page of the app.
- Ensure the app is accessible on mobile devices.
- Customize the app branding with the company's logo and colors.


custom application home page

App Launcher

Search apps or items...


Visit AppExchange

▼ All Apps




Service

Manage customer service with accounts, contacts, cases, and more




Marketing CRM Classic

Track sales and marketing efforts with CRM objects.




Community

Salesforce CRM Communities




Site.com

Build pixel-perfect, data-rich websites using the drag-and-drop Site.com...




Salesforce Chatter

The Salesforce Chatter social network, including profiles and feeds




Content

Salesforce CRM Content




Sales

Manage your sales process with accounts, leads, opportunities, and more




Sales Console

(Lightning Experience) Lets sales reps work with multiple records on one screen




Service Console

(Lightning Experience) Lets support agents work with multiple records across...




Lightning Usage App

View Adoption and Usage Metrics for Lightning Experience




Digital Experiences

Manage content and media for all of your sites.




Playground Starter

Get started with your Trailhead Playground.




Bolt Solutions

Discover and manage business solutions designed for your industry.



Interview

Track the interview process



Capstone Project

▼ All Items

Accounts

Communication Subscription Timings

Groups

Payment Gateway Logs

Alternative Payment Methods

Communication Subscriptions

Home

Payment Gateways

Analytics

Consumption Schedules

Images

Payment Line Invoices

App Launcher

Contact Point Consent

Incidents

Payments

Approval Requests

Contact Point Type Consent

Individuals

People

custom application settings

21

Lightning App Builder

App Settings

Pages

Capstone Project

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove items you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that doesn't support the item.

Available Items

Type to filter list...

All Sites

Alternative Payment Methods

Analytics

App Launcher

Approval Requests

Asset Action Sources

Asset Actions

Asset State Periods

Assets

Async Operation Logs

Authorization Form

Authorization Form Consent

Authorization Form Data Use

Authorization Form Text

Awards

Background Operations

Selected Items

Accounts

Contacts

Interview Object

Tasks

Calendar

Lightning App Builder

App Settings

Pages

Capstone Project

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

Capstone Project

* Developer Name

Capstone_Project

Description

Enter a description...

App Branding

Image

Primary Color Hex Value

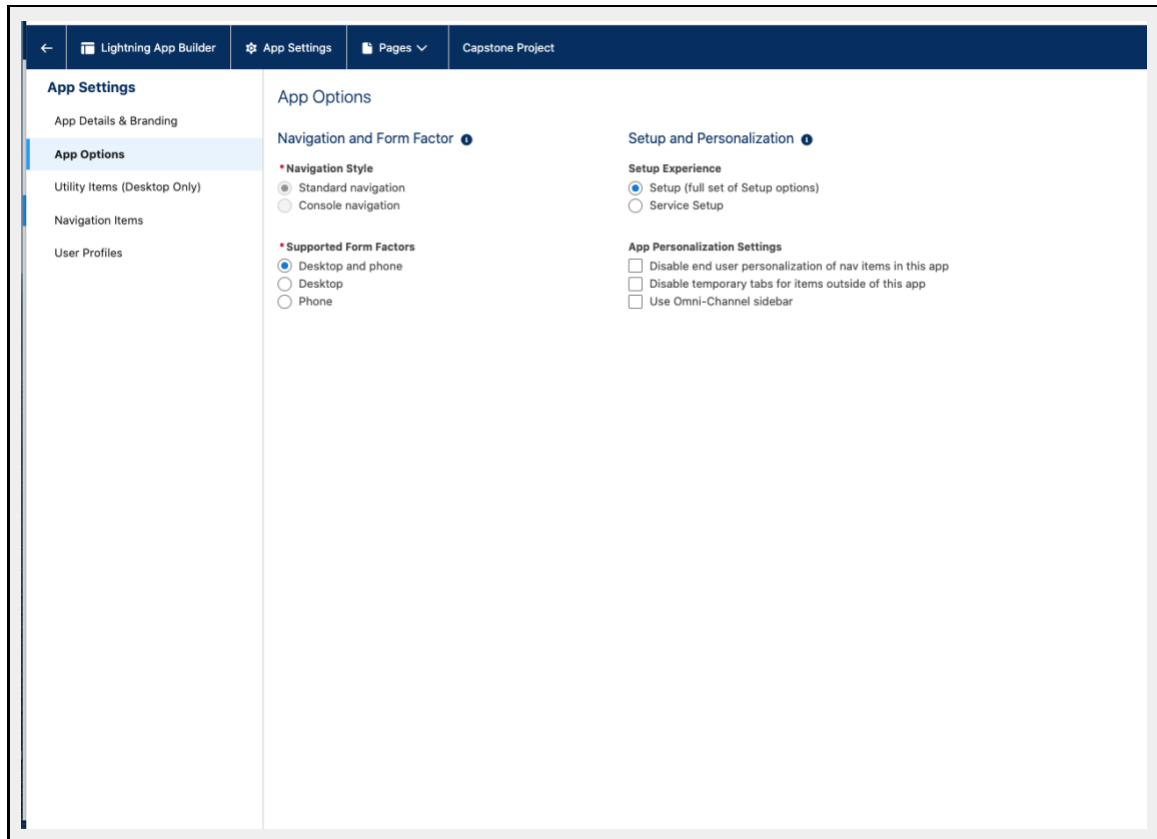
#000000

Org Theme Options

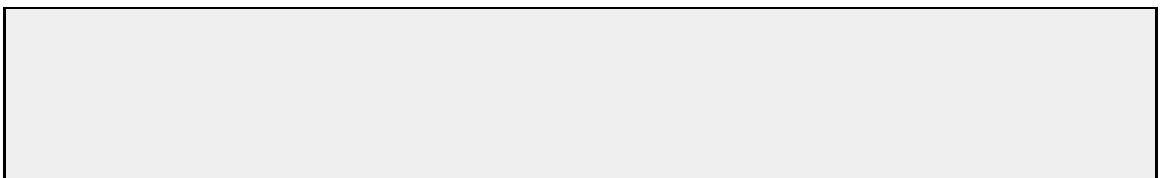
Use the app's image and color instead of the org's custom theme

App Launcher Preview

Capstone Project



Section 8: Training Video



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