PROJECT REPORT ON

CREATING A JOB APLLICATION TRACKING SYSTEM

Developer – (Short term)

Skills Required:

Salesforce Developer

Project Description:

This project provides real-time knowledge for all the students who have basic knowledge of Salesforce and looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain knowledge and can include it into their resume as well.

Aim:

To create a CRM Application which helps the applicants to track the number of jobs they've applied and helps them to find the job posted by the various recruiters and also to find the best attributes to be involved to run the process in a smooth way and easily to track.

Creating a Salesforce Developer Org

1. Search Developer.salesforce.com/signup

2. Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique
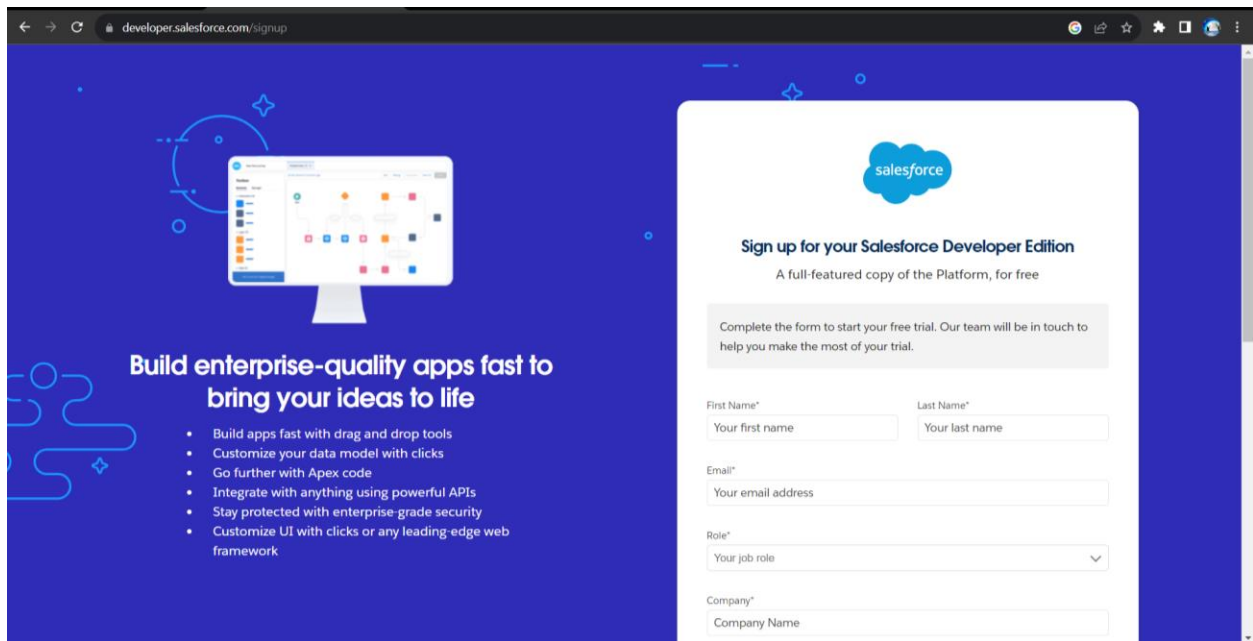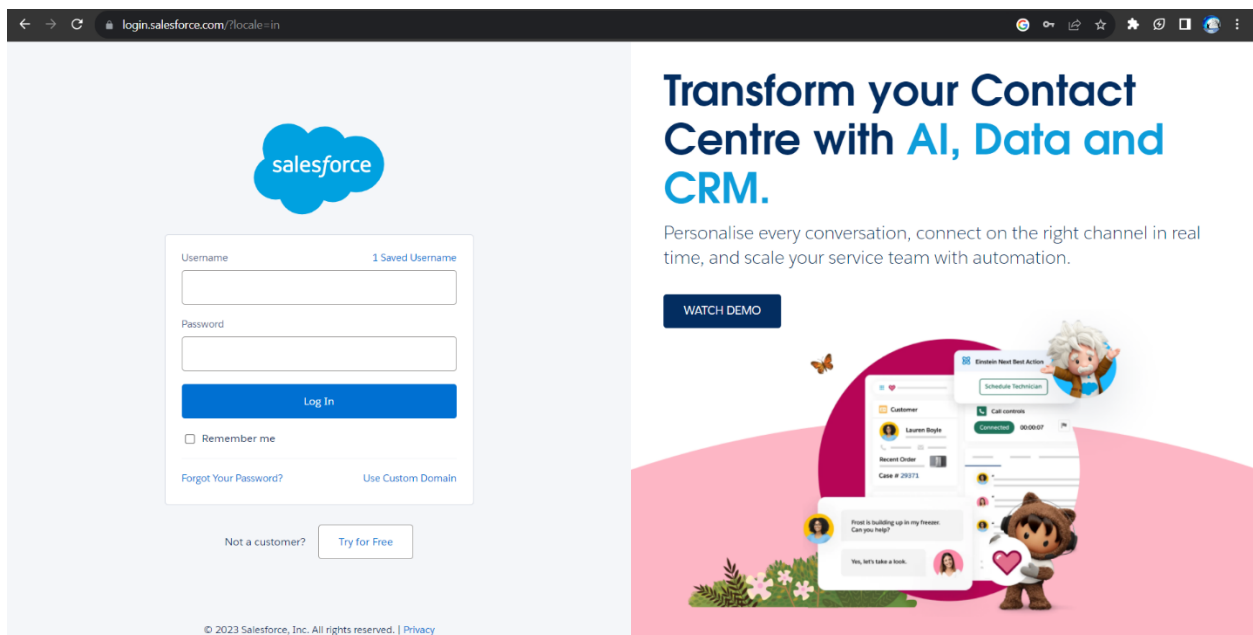
3. Click sign me up, after a few min you will reserve a mail salesforce org and by using the verify account link you can create your new password

4. Click save.

5. Search login.salesforce.com

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

The home page will appear as below

Create a Custom Object For Recruiter

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 "Recruiter ".

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

5. Record name: "Recruiter 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.

11. Leave everything else as is, and click Save
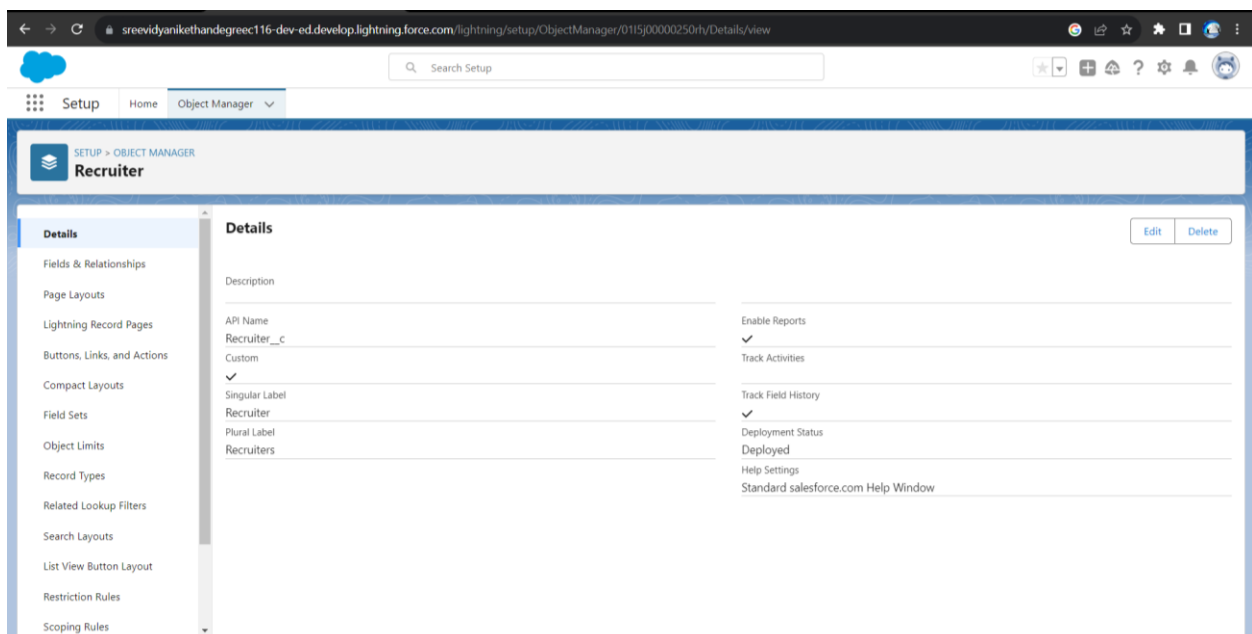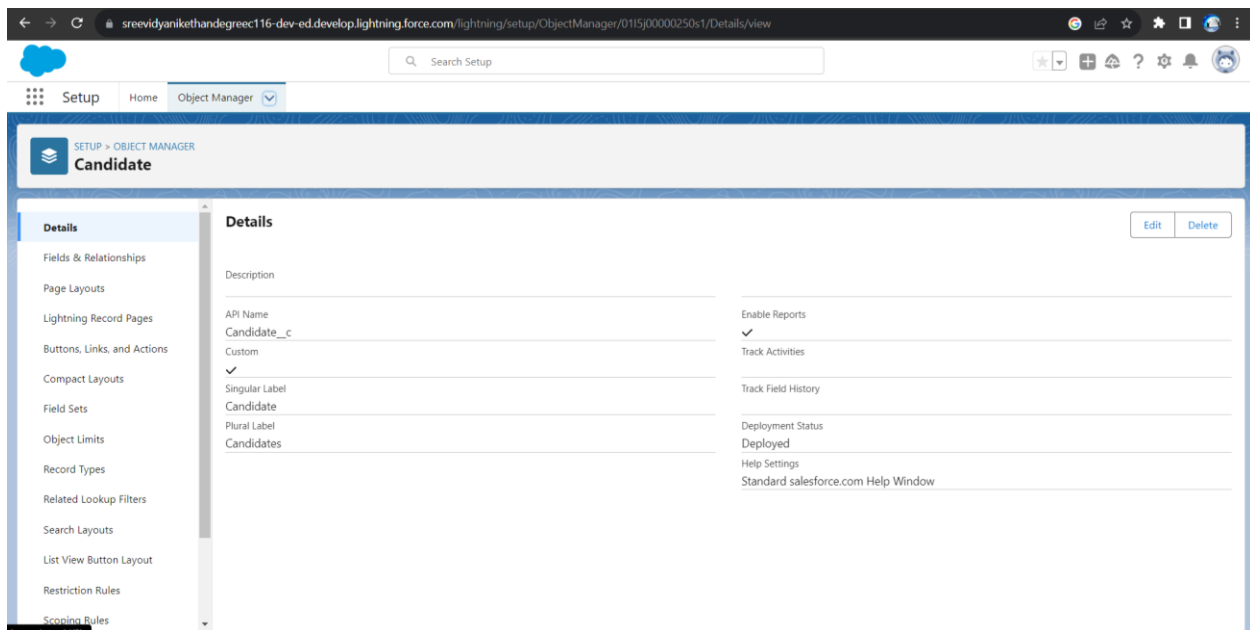
Creation of Jobs Object

1. Click on the gear icon and then select Setup.

2. Click on the object manager tab just beside the home tab.

3. Click create, select custom object.

4. On the Custom Object Definition page, create the object as follows:

- Label: *Job*
- Plural Label: *Jobs*
- Record Name: *Job Name*
- *Select the data type as "Text".*
- Check the *Allow Reports* checkbox
- Check the *Allow Search* checkbox
- In the Object Creation Options section, select *Add Notes and Attachments related list to default page layout*
- Click Save.
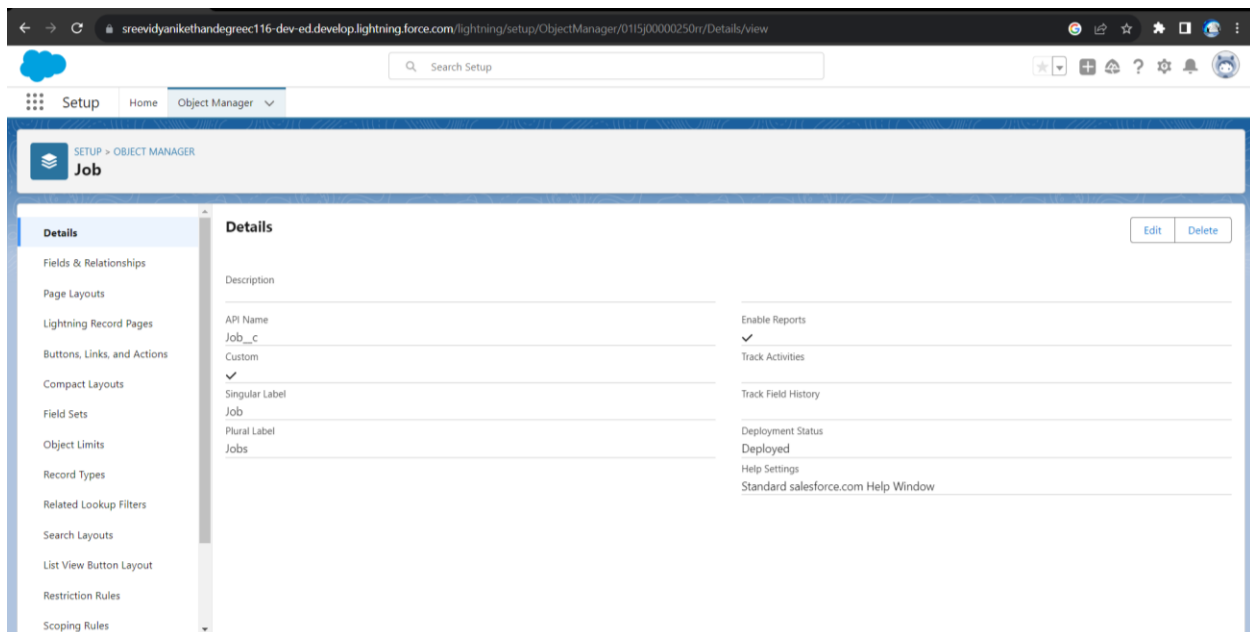
Creation of Candidate Object

1. Click on the gear icon and then select Setup.

2. Click on the object manager tab just beside the home tab.

3. Click create, select custom object.

4. On the Custom Object Definition page, create the object as follows:

- Label: *Candidate*
- Plural Label: *Candidates*
- Record Name: *Candidates Name*
- Select the data type as "*Text*".
- Check the *Allow Reports* checkbox.
- Check the *Allow Search* checkbox.
- In the Object Creation Options section, select *Add Notes and Attachments related list to default page layout*.
- Click Save.

Creation of Job Application Object

1. Click on the gear icon and then select Setup.

2. Click on the object manager tab just beside the home tab.

3. Click create, select custom object.

4. On the Custom Object Definition page, create the object as follows:

- Label: *Job Application*
- Plural Label: *Job Applications*
- Record Name: *Job Application Number*

- Select the data type as "*Auto Number*".
- Under display format enter *"JP-{0000}"*
- Enter starting number as *1*
- Check the *Allow Reports* checkbox.
- Check the *Allow Search* checkbox.
- In the Object Creation Options section, select *Add Notes and Attachments related list to default page layout.*
- Click Save.
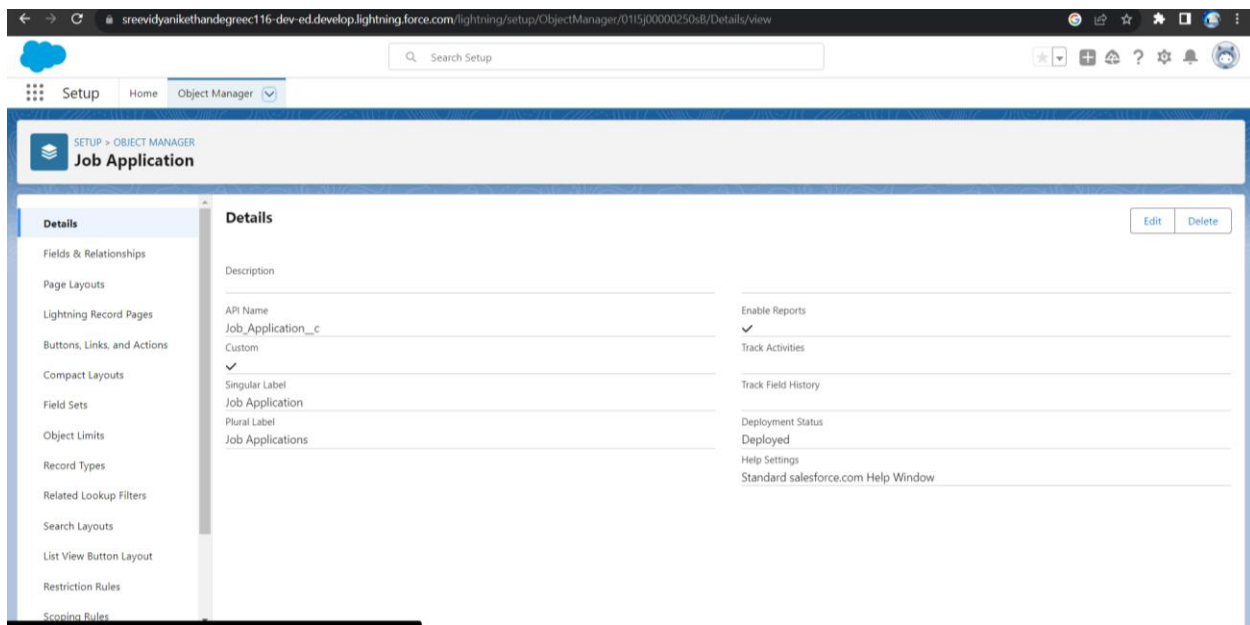
Creation of Recruiter Tab

1. Click on Home tab, enter Tabs in Quick Find and select Tabs

2. Under custom object tabs, click New.

3. For Object, select Recruiter.

4. For Tab Style, select any icon.

5. Leave all defaults as is. Click Next, Next, and Save.

Creation of Job Tab

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

2. Under custom object tabs, click New.

3. For Object, select Job.

4. For Tab Style, select any icon.

5. Leave all defaults as is. Click Next, Next, and Save.

Creation of Candidate Tab

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

2. Under custom object tabs, click New.

3. For Object, select Candidate.

4. For Tab Style, select any icon.

5. Leave all defaults as is. Click Next, Next, and Save.

Creation of Job Application Tab

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

2. Under custom object tabs, click New.

3. For Object, select Job Application.

4. For Tab Style, select any icon.

5. Leave all defaults as is. Click Next, Next, and Save.
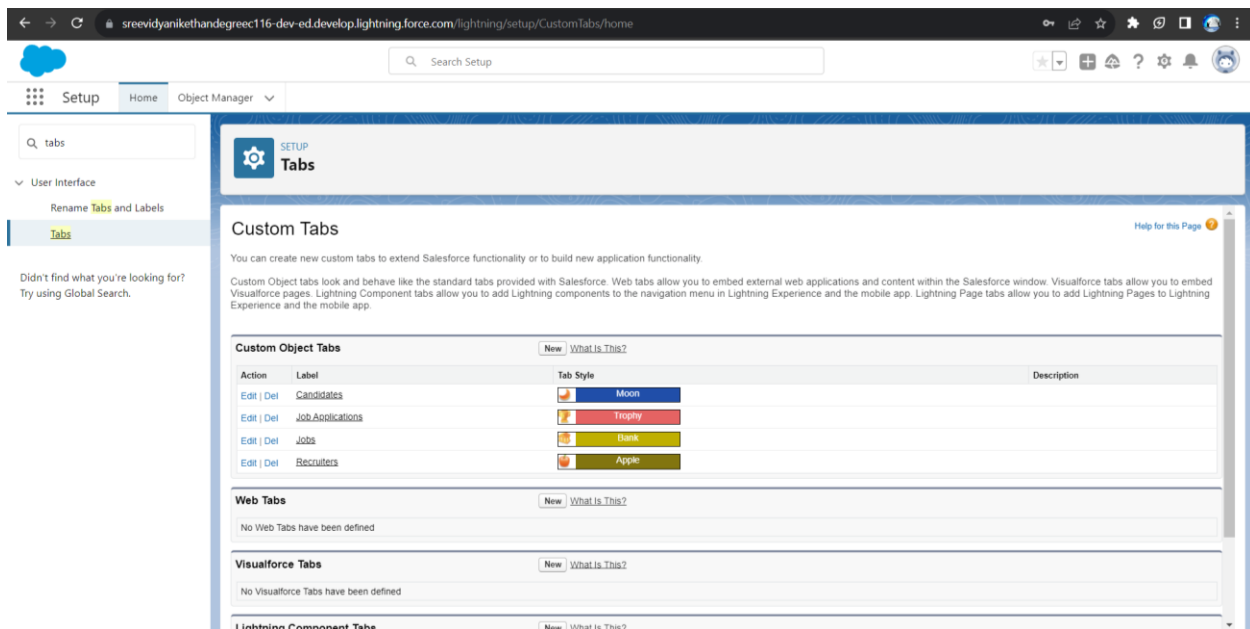
Create the Job Application Tracking App

1. From Setup, enter App Manager in the Quick Find and select App Manager.

2. Click New Lightning App. Job Application Tracking as the App Name, then click Next

3. Under App Options, leave the default selections and click Next.

4. Under Utility Items, leave as is and click Next.

5. From Available Items, select Recruiters, Jobs, Candidates, Job Application Reports and Dashboards and move them to Selected Items. Click Next.

6. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
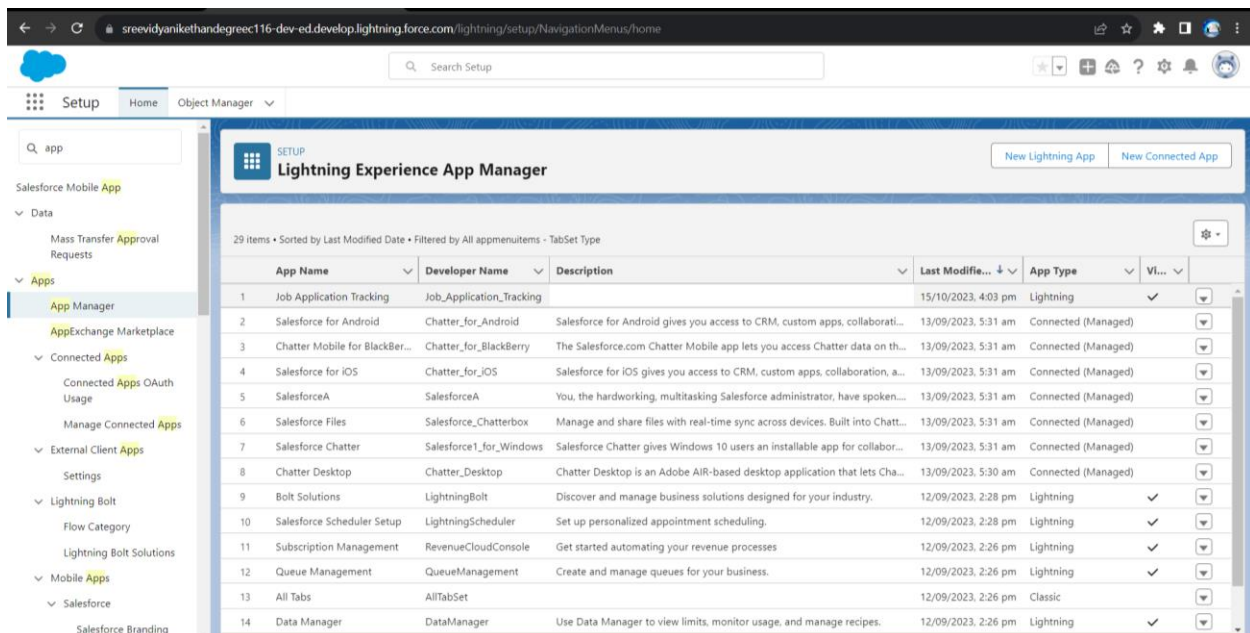
Creation Of Fields For The Recruiter Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select Recruiter.

4. Select Fields & Relationships from the left navigation, and click New

Creation of Fields for The Job Objects

In the same we can create fields for the Job object.

Creation of Fields for Candidate Object

In the same we can create fields for the Candidate object.

Creation Fields for the Job Application Objects

In the same we can create fields for the Candidate object.
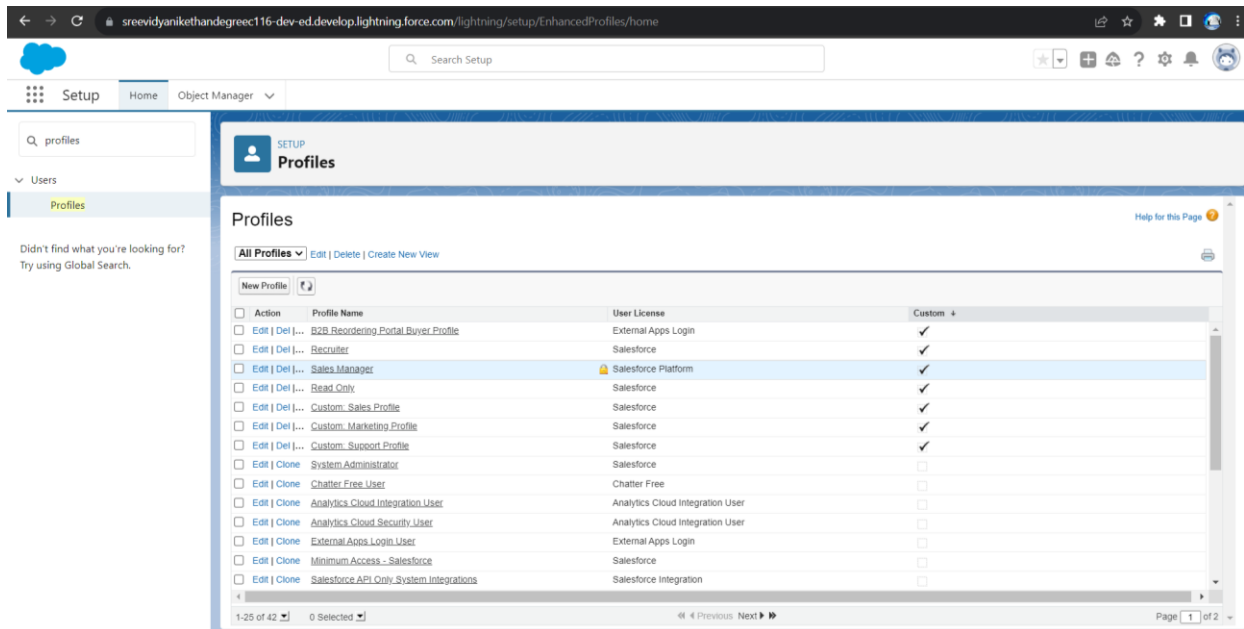

Create a Custom Profile

1. From setup, enter profiles in Quick Find box

2. Select profiles (Standard user).

3. Click clone.

4. For Profile, enter Recruiter.
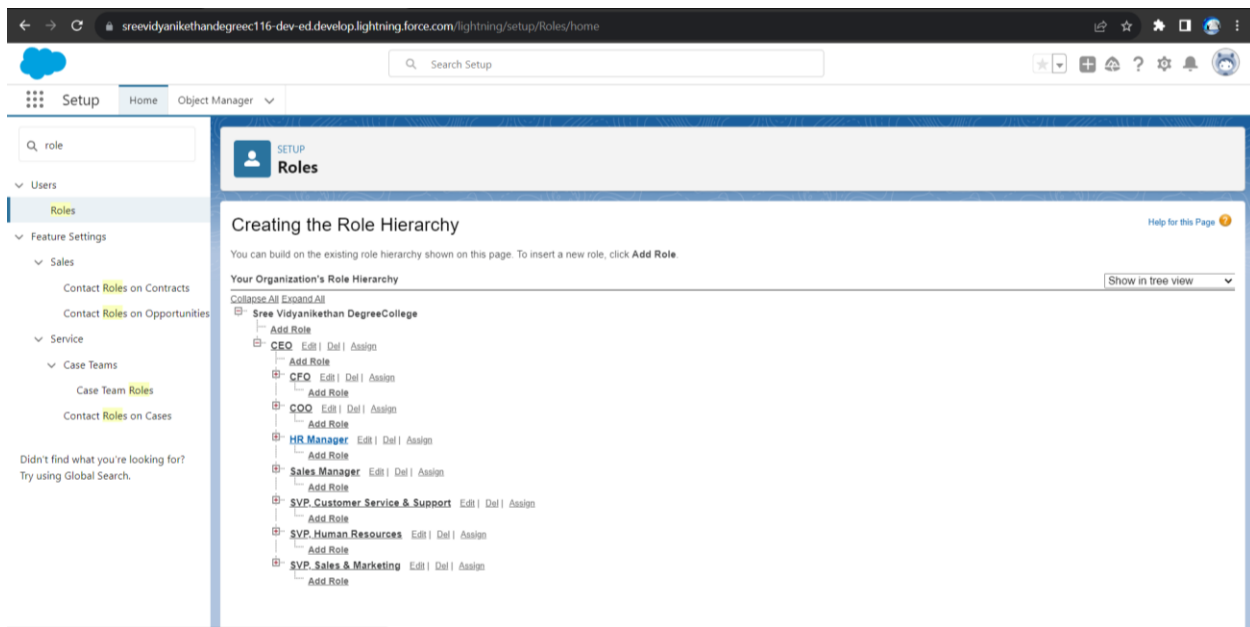
5. Click save.

Create a Custom Profile-2

Create a profile with the profile name as "Sales Manager".

Creation of Role

1. From the Quick find box search for the role and click on the roles option

2. Select the set up roles option

3.Below the CEO click on add role and enter the label name as a " HR Manager " and role name will be Automatically populated and click on save.

Create a User

1. From Setup, enter Users in the Quick Find box, then select Users.

2. Click New User.

3. Enter First name as HR and last name as Manager.

4. Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.

5. Then create a new role HR Manager.

6. Select user License as Standard Platform User.

7. Select profile (Recruiter).

8. Click save
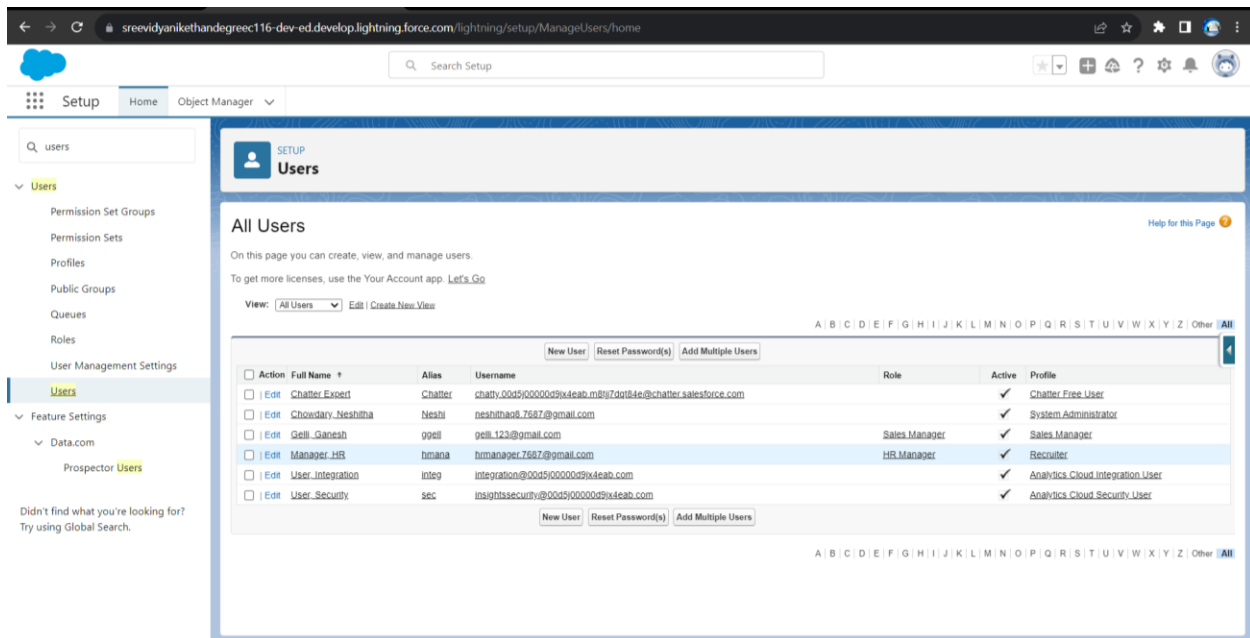
Create another User

Create a user with a username as "Ganesh Gelli", and assign him the sales Manager profile. Follow the steps from above Activity

Create A Sharing Rule

1. Go to Sharing Settings, which can be found under the Quick Find section.

2. Scroll down and find the candidate object where a sharing rule needs to be added, and then click on New to create a new sharing rule.

3. Add the label of the sharing rule you want to make.

4. Select your rule type based on the criteria.

5. Select the field can join immediately check field from the candidate object.

6. Select the State as equal and value is Rajasthan.

7. And in selecting the users to share with the section select roles and in that select Hr Manager.

8. And in the section of select the level of access for the users give the access Read/Write.
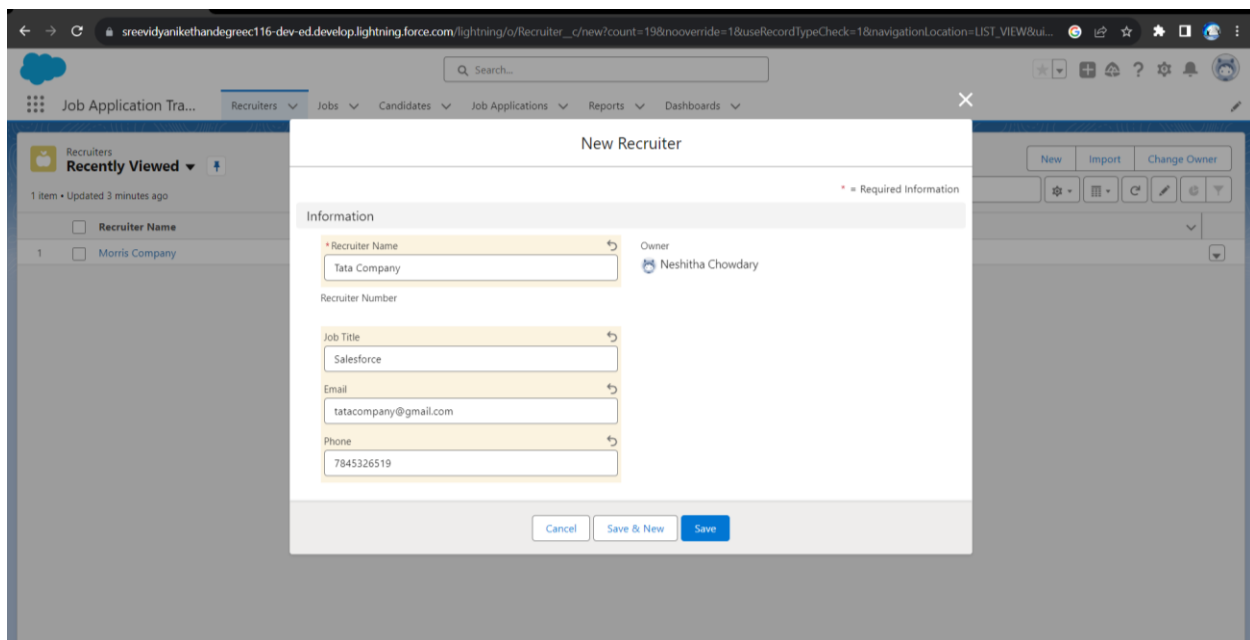
9. Save the rule.

Another Sharing Rule

Create a Sharing Rule to Share the records of Job Application to Hr Manager with the Access of Read/Write.
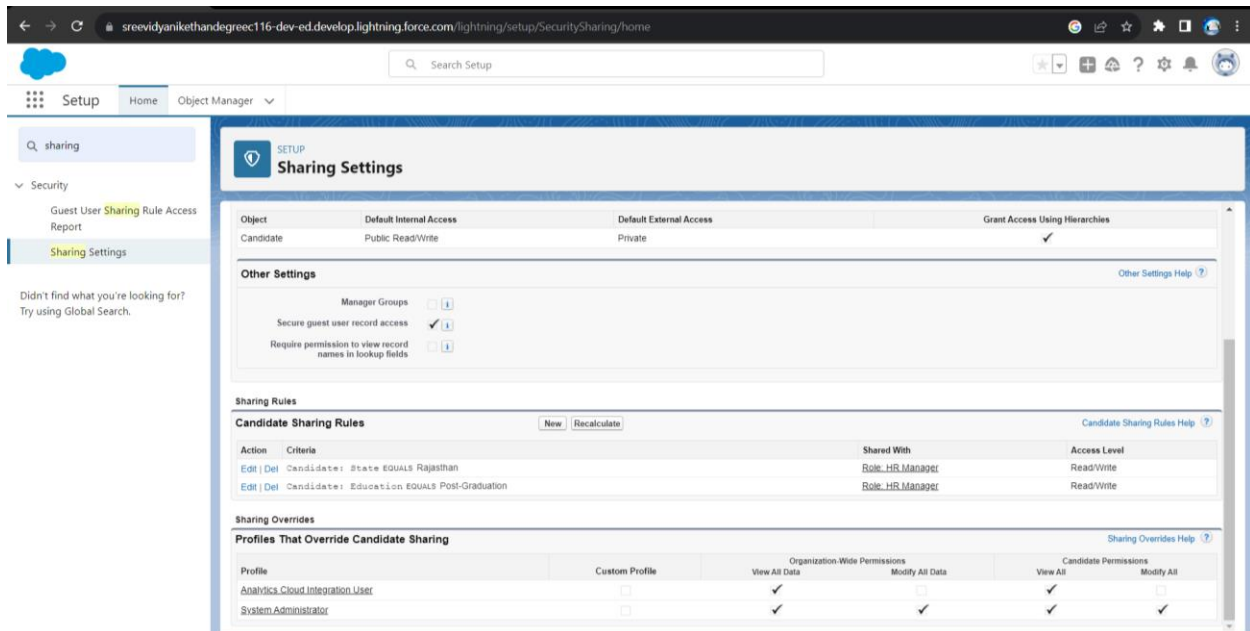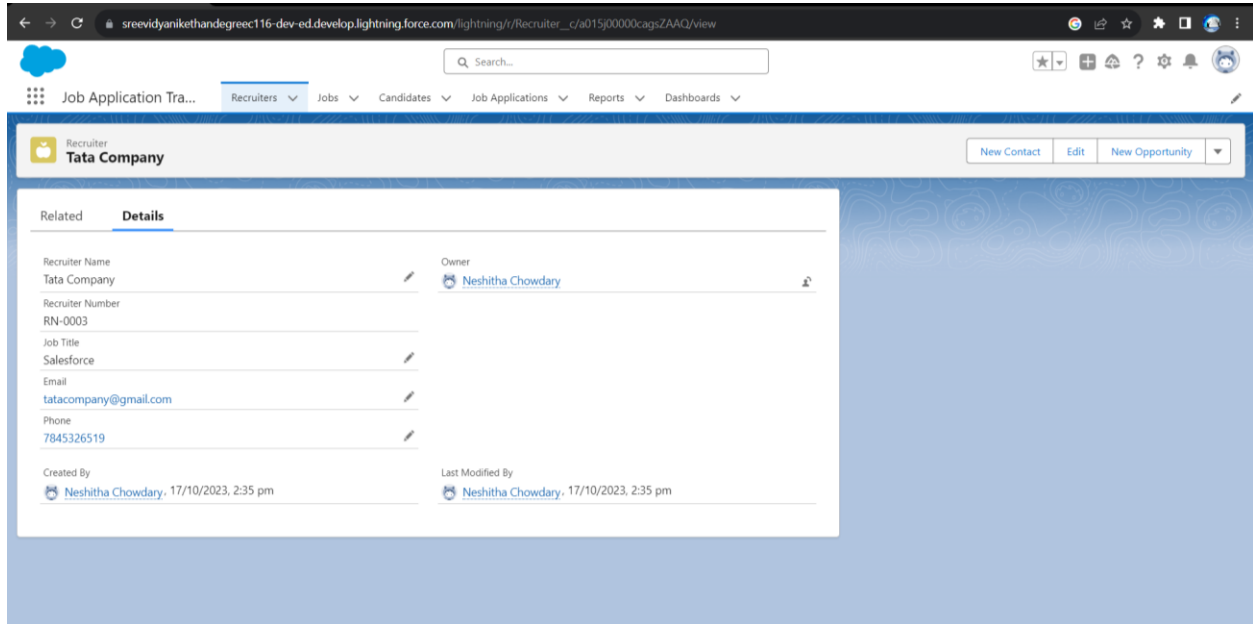

Create A Record (Recruiter)

1. Click on App Launcher on left side of screen.

2. Search Job Application Tracking & click on it.

3. Click on Recruiter Tab.

4. Click new and fill details & Save

View A Record (Recruiter)

1. Click on App Launcher on left side of screen.

2. Search Job Application Tracking & click on it.

3. Click on Recruiter Tab.

4. Click on any record name. you can see the details of the Event.

Delete A Record (Recruiter)

1. Click on App Launcher on left side of screen.

2. Search Job Application Tracking & click on it.

3. Click on Recruiter Tab.

4. Click on Arrow at right hand side on that Particular record.

5. Click delete and delete again.

Create a Report

Create a report that displays rating of the account and which has type and account name.

1. Click on app launcher search for reports.

2. Click on the new report and select the category has job application with candidate name.

3. In the details section select the option start report.

4. Show me my job application and job application created date.

5. In the outline pane, group rows select job application created date.

6. Save the report by giving label name (Job application with candidate name) and save the folder as a public folder and save the report.

Create Another Report

Create a Report using the Objects Jobs, Candidate and Job Application. Follow the steps from above Activity.

Create a Dashboard

1. Click the Dashboards tab.

2. Click New Dashboard.

3. Name the dashboard Job application with candidate name and click Create.

4. Click +Component.

5. Select the Job application with candidate name and click Select.

6. Select the Gauge chart and click Add.

7. Click Save and then Done.
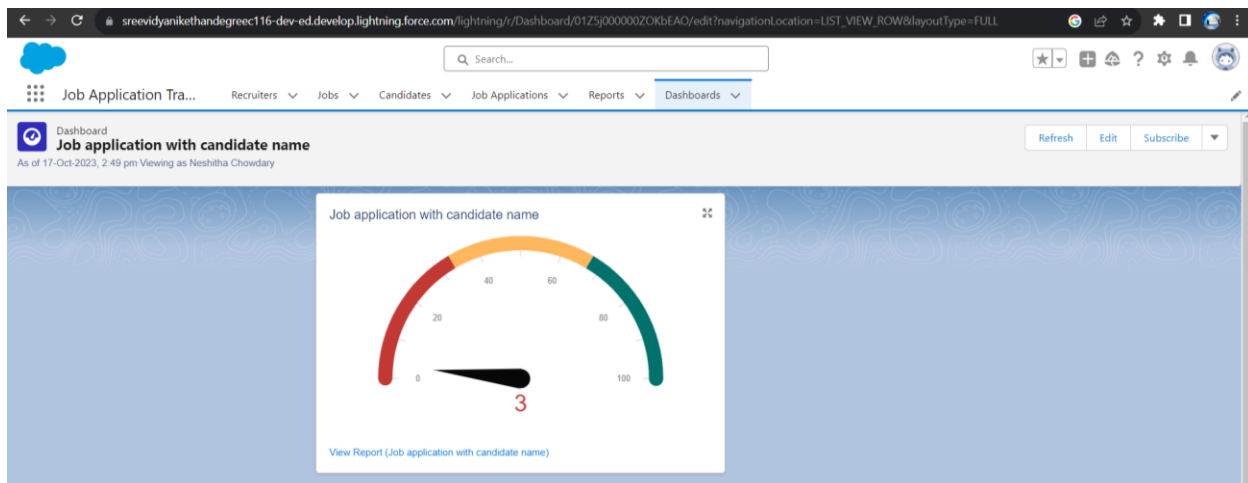
Create A Record Trigger Flow On Job Object

1. Click on Gear icon and select setup

2. In Quick find Box enter flow and select the flows

3. Click on New flow and Select Record triggered Flows.

4. In the search bar type job and click done.

5. Add an element called Get record.

6. Label name as Recruiter Records.

7. Select the object as Recruiter.

8. After entering the object follow the steps.

9. Conditional requirements should be all conditions are met (AND).

10. Select the field as Recruiter_Email__c.

11. Operation should be Is Null.

12. Value should be False. And click done.

13. Select the action as Send Email .

14. Enter the label name job email, API name is auto populated .

15. Set input values as

  a. Body: {!$Record.Name} with {!$Record.Job_Application_Id__c} is available. Please find the suitable candidates for the position.

  b. Subject: {!$Record.Name}

16. Recipient Email Addresses (comma-separated) should be included for that turn it on

17. Recipient Email Addresses: {!$Record.Recruiter_Name__r.Recruiter_Email__c}

18. Click on done.

19. After the completion of flow, check whether the flow is running and click save.

20. Activate the flow.
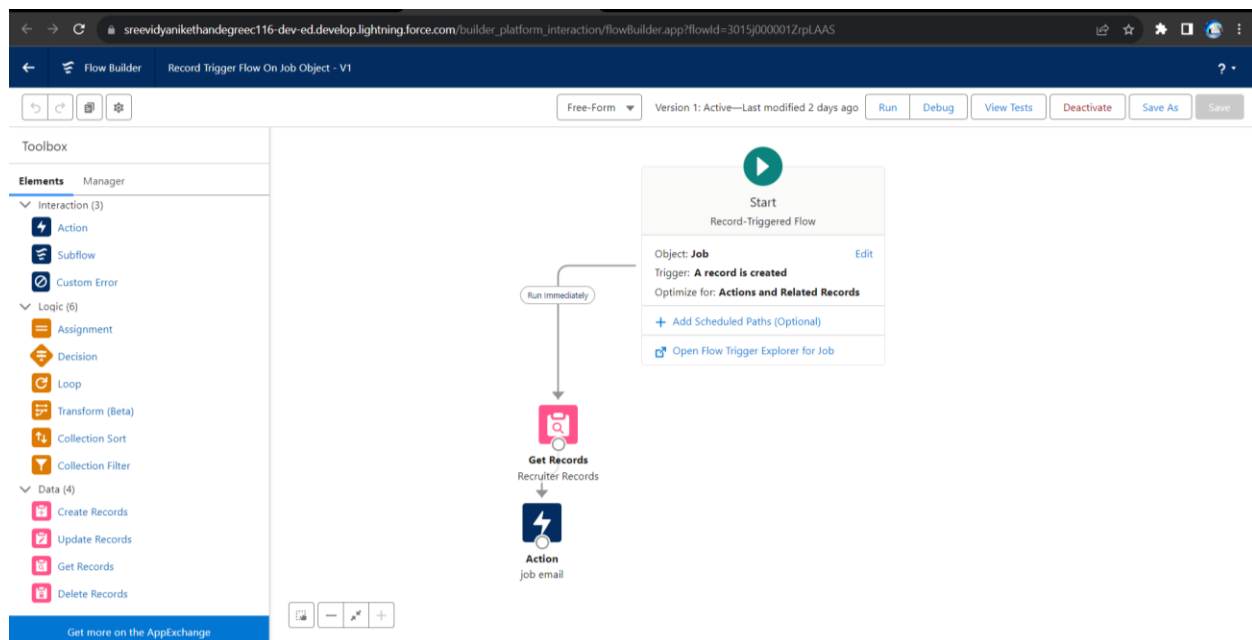
Create another Flow

1. Click on Gear icon and select setup
2. In Quick find Box enter flow and select the flows
3. Click on New flow and Select screen Flows.
4. Add an element called screen.
5. Screen label should be Candidate details.
6. API name is auto populated.
7. Add the components in canvas.
8. Select the text from the components.
9. Label name as Candidate name.
10. API name is auto populated.
11. Select the text area from the components.
12. Label name as Address.
13. API name is auto populated.
14. Select the email from the components.
15. Label name as Email.
16. API name is auto populated.
17. Select the Phone from the components.
18. Label name as Phone.
19. API name is auto populated.
20. Select the picklist from the components.
21. Label name as Education.
22. API name is auto populated.

23. And select the choice as {!pick}.
24. Add a header to the canvas candidate flow for job application.
25. Click on save.
26. Next, add another element called create record.
27. Label name should be Create candidate record.
28. API is auto populated. and change the How to Set the Record Fields to Use separate resources, and literal values.
29. Select the object Candidate1.
30. Set the values for the candidate1 as
31. Field is Address__c and value should be {!Address}.
32. Field is Education__c and value should be {!Education}.
33. Field is Email__c and value should be {!Email.value}.
34. Field is Name and value should be {!Candidate_name}.
35. After that click on done
36. Run the flow and check whether the flow is working and click on save.
37. And activate the flow.