

Recruiting Assistance For The HR Managers



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PROJECT REPORT

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BONAFIDE CERTIFICATE

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CHAPTER-1

PROJECT SPECIFICATION

1.1 Project Goal

The project goal for "Recruiting Assistance For The HR Managers Salesforce Project" is to ensure the successful and efficient recruitment of qualified individuals to support the HR managers in implementing and managing a Salesforce project. The specific project goals can be broken down as follows:

- **Staffing:** Ensure that the project team is appropriately staffed with skilled professionals in roles such as Salesforce administrators, developers, consultants, and project managers.
- **Competency Alignment:** Match the skills and competencies of the recruited candidates with the specific technical and soft skill requirements of the Salesforce project.
- **Efficiency:** Streamline the recruitment process to minimize the time and resources required to identify, interview, and onboard the right talent.
- **Quality:** Focus on recruiting high-quality candidates who can contribute effectively to the success of the Salesforce project.

The ultimate project goal is to provide the HR managers with the right team of professionals who can successfully implement and manage the Salesforce project, contributing to its overall success and efficiency. This requires careful planning, recruitment, on-boarding, and ongoing support throughout the project's life cycle.

1.2 Project Scope

The primary objective of this project is to provide comprehensive recruiting support for the implementation of the Salesforce project led by HR managers. This project will focus on identifying, selecting, and onboarding the right talent to support the successful execution and management of the Salesforce project. The recruitment efforts will be tailored to the specific needs of the project, including positions like Salesforce administrators, developers, consultants, and project managers.

Key Deliverables:

- The project's key deliverables include:
 - a. Job descriptions for all required positions.
 - b. Shortlisted and qualified candidates for each position.
 - c. Conducted interviews and assessments.
 - d. Verified candidate references.
 - e. Successfully extended offers to selected candidates.
 - f. Facilitated the onboarding process for new hires.
 - g. Feedback and performance monitoring reports.

Project Boundaries:

This project will focus on the recruitment and onboarding aspects only. It does not include ongoing HR management, salary negotiations, or performance evaluations, which will be handled by the HR department.

Approval:

This project scope statement is subject to approval by HR managers and relevant project stakeholders.

Project Timeline:

The project will commence on [02/10/2023] and is expected to be completed by [31/10/2023], with specific milestones and deadlines to be outlined in the

project plan.

Risks:

Potential risks for this project may include difficulties in finding qualified candidates, budget constraints, and extended timeframes for the recruitment process.

Stakeholders:

The primary stakeholders for this project include HR managers, project managers, recruiting team members, and candidates being recruited.

Assumptions:

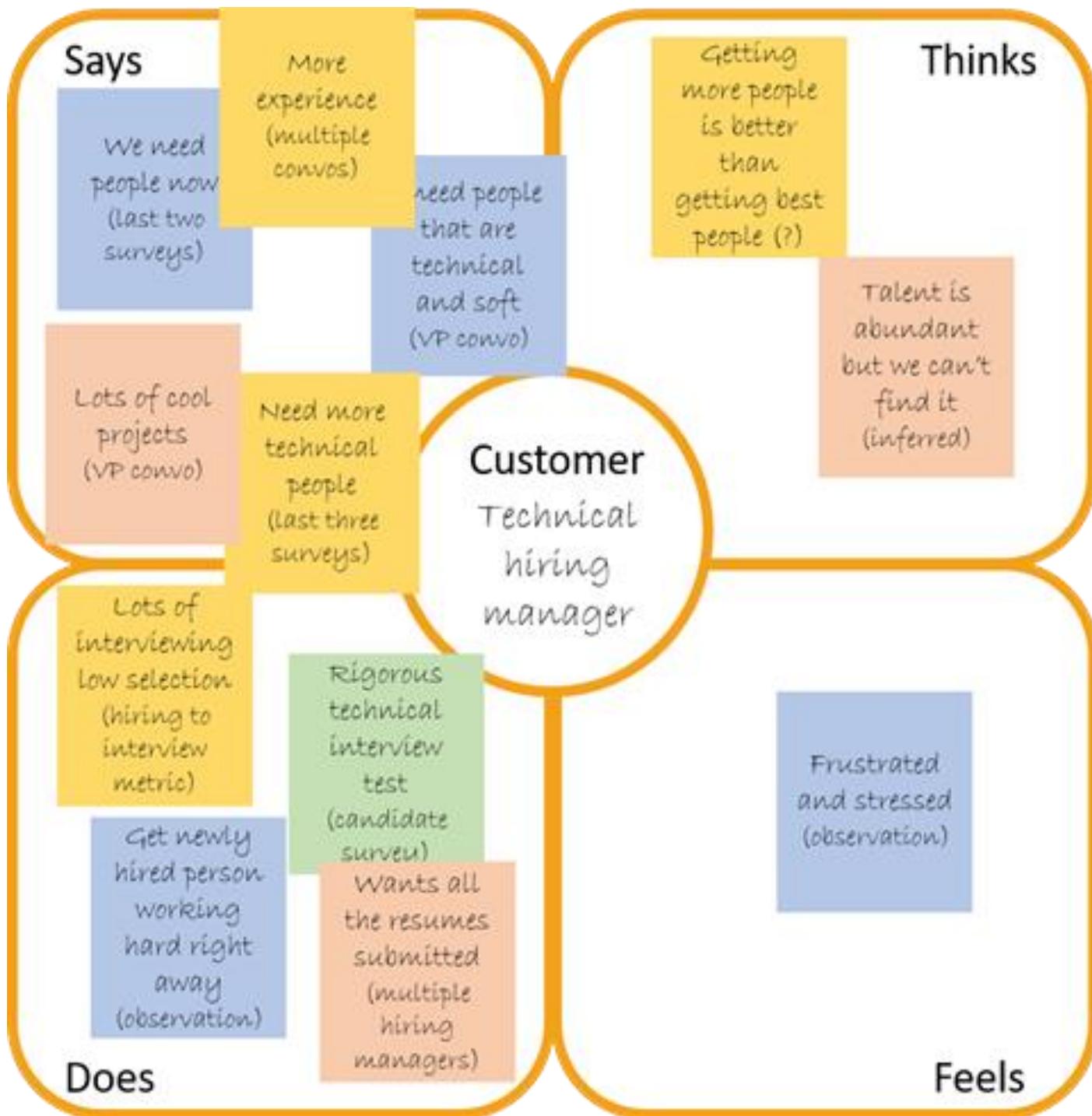
The project assumes that HR managers and project stakeholders will provide clear and timely communication on the specific job requirements and objectives for the Salesforce project.

1.3 Problem Statement Definition

| Problem for | Trying to | But | Which makes |
|--------------------|---|--|--|
| HR Managers | The project aims to source and onboard qualified individuals proficient in Salesforce administration, development, consulting, and project management to support the successful execution of the Salesforce project led by HR managers. | The current recruitment approach lacks specificity and efficiency, resulting in extended hiring timelines, difficulty in identifying suitable candidates, and potential mismatch between the skill set required for the Salesforce project and the recruited talent. | This situation creates a bottleneck in the timely and effective implementation of the Salesforce project, leading to increased project risks, potential delays, and a higher probability of onboarding individuals who might not be optimally aligned with the project's needs and objectives. |

1.4 Empathy Map Canvas

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.



1.5 Proposed Solution

| S. No | Parameter | Description |
|-------|--|--|
| 1. | Job Description Refinement <small>Job Description Refinement</small> | Create detailed and precise job descriptions for each role required for the Salesforce project, including Salesforce administrators, developers, consultants, and project managers. These descriptions should clearly outline the technical and soft skills needed, as well as the project's objectives. |
| 2. | Specialized Recruitment Channels | Utilize specialized recruitment channels and platforms to target individuals with expertise in Salesforce. This can include Salesforce-specific job boards, professional networking sites, and partnerships with industry associations to reach a more focused talent pool. |
| 3. | Focused Interview Process | Implement a structured interview process that assesses both technical skills related to Salesforce and interpersonal skills relevant to teamwork and project management. Consider including technical assessments and scenario-based questions related to Salesforce to evaluate candidates effectively |
| 4. | Reference Verification | Facilitate a smooth onboarding process for new hires, which includes providing project-specific training and resources. Ensure that the recruited team members are integrated seamlessly into the Salesforce project, allowing them to contribute quickly and efficiently. |
| 5.. | Onboarding Support | acilitate a smooth onboarding process for new hires, which includes providing project-specific training and resources. |
| 6. | Performance Monitoring and Feedback | This allows for tracking the effectiveness of the recruited team members and making necessary adjustments to ensure their success within the project. |

1.6 Functional & Technical Requirements

1.6.1 Functional Requirements

| Requirement | Description |
|------------------------------------|--|
| Compliance Tracking | Ensure that the system supports compliance with labor laws and regulations, including documentation and reporting requirements |
| Reporting and Analytics | Provide reporting and analytics features to generate insights into the recruitment process, such as time-to-fill, cost per hire, and candidate source effectiveness. |
| User Access Control | Implement user access control to ensure that only authorized individuals have access to candidate information and recruitment data |
| Integration with HR Systems | Integrate with existing HR and project management systems to share relevant data seamlessly and avoid redundancy |
| Scalability | Ensure the system is scalable to handle an increasing number of recruitment activities as the project grows or evolves. |
| Mobile Accessibility | The system should be accessible on mobile devices to enable HR managers and project stakeholders to manage recruitment tasks while on the go |

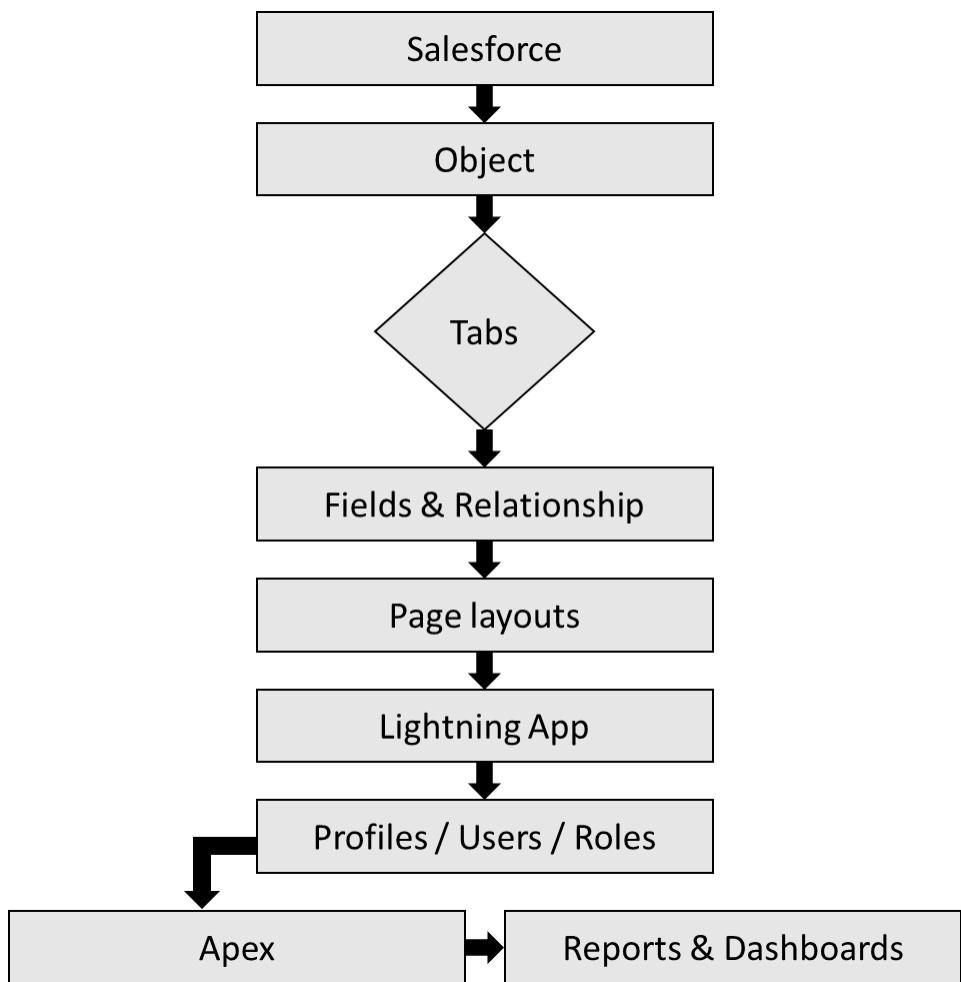
1.6.2 Technical Requirements

| Requirement | Description |
|--------------------------------------|--|
| System Documentation | Maintain comprehensive system documentation that includes system architecture, user manuals, and technical specifications to assist in troubleshooting and future enhancements |
| Data Security | Robust data security measures, such as encryption and access controls, should be in place to protect sensitive customer information and transaction data. |
| Scalability and Load Testing | Perform scalability and load testing to ensure that the system can handle a surge in recruitment activities without performance degradation |
| Technical Support | Establish a support mechanism for technical issues and software maintenance to address bugs, updates, and enhancements promptly |
| User-Friendly Interface | The system should feature a user-friendly interface to ensure ease of use and rapid adoption by our staff.. |
| Technical Support and Updates | Ongoing technical support, system maintenance, and regular updates should be provided to keep the system up to date and secure. |

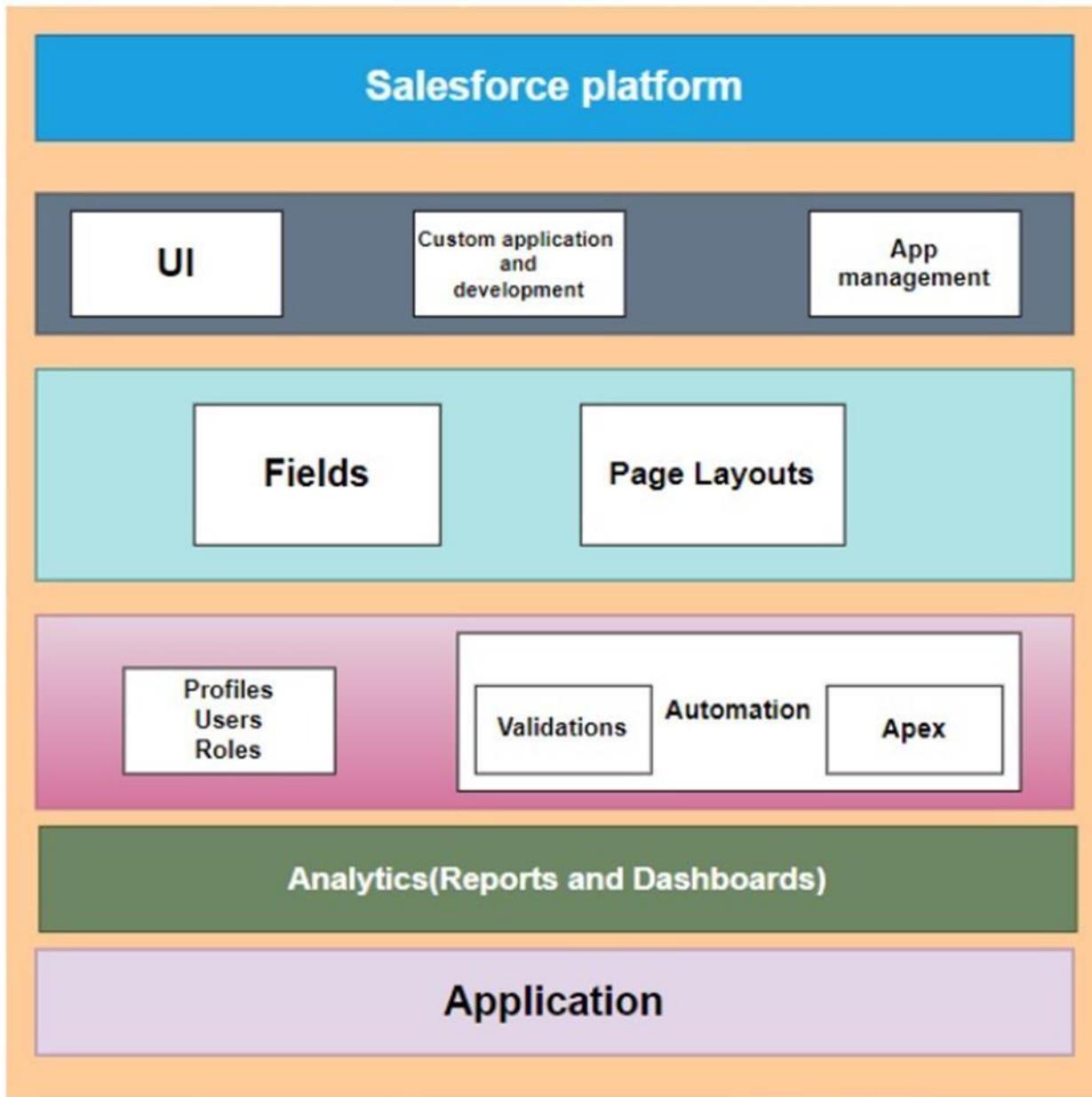
1.7 Project Road Map

1.7.1 Data Flow Diagram

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data enters and leaves the system, what changes the information, and where data is stored.



1.7.2 Technical Architecture



CHAPTER-2

PREPARATION DATA MODELING

2.1 Salesforce Developer Org

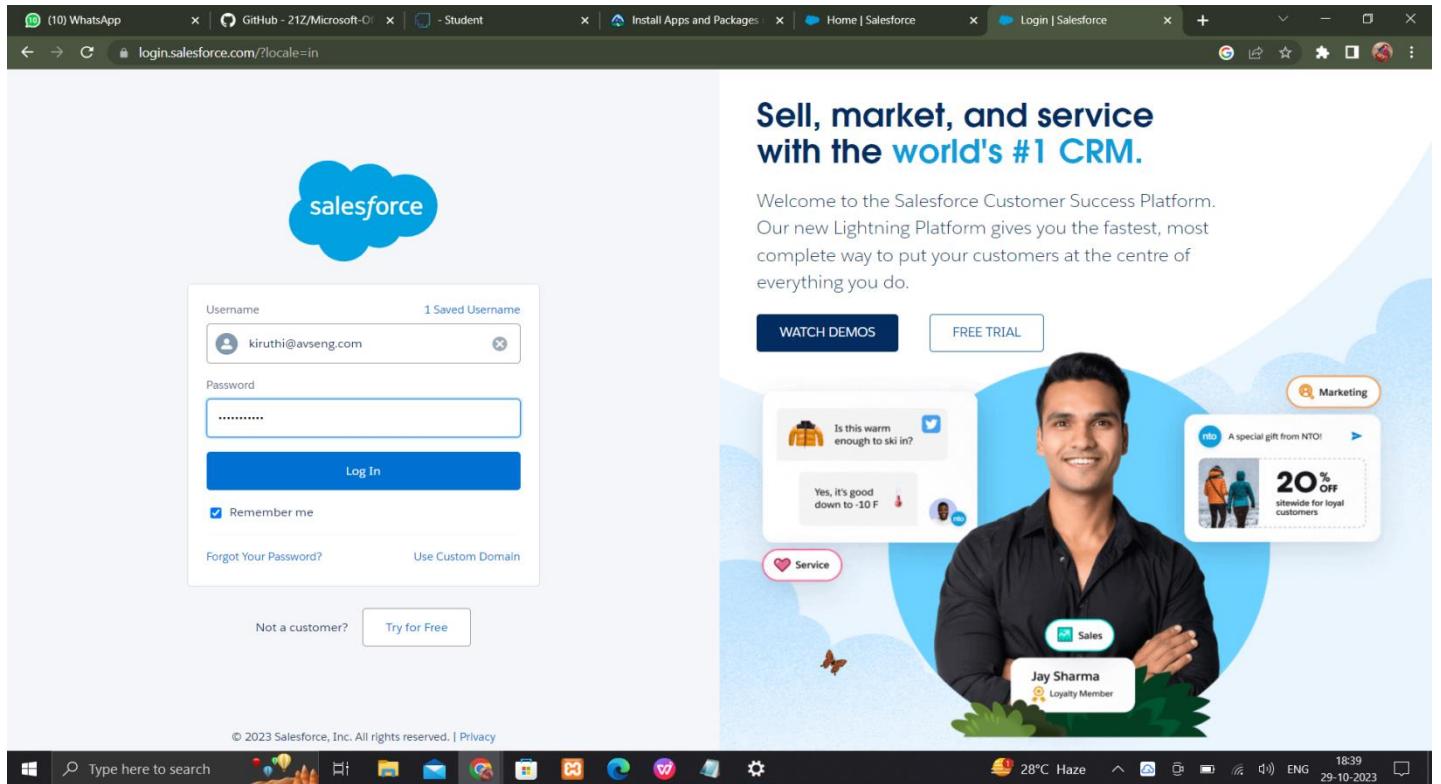
In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.

The screenshot shows the Salesforce Developer Portal homepage. At the top, there are three tabs: 'Inbox (14,062) - ajmalikram152', 'Bard', and 'Developer Portal | Salesforce Dev'. Below the tabs is a navigation bar with links for 'Products', 'Industries', 'Customers', 'Learning', 'Support', 'Company', and 'Salesforce+'. A search bar says 'Search Developers' and a 'Login' button is visible. The main content area features a large blue circular graphic with a white bear outline and the text 'Get release-ready today!'. Below the graphic, it says 'Check out the Salesforce Developer's Guide to the Winter '24 Release and get a taste of the latest and greatest features and functionality.' A blue button labeled 'Read it now' is present. To the right, there is a 'Browse Trials' button. At the bottom, there is a section titled 'Latest Developer News' with a dark background and various icons.

The screenshot shows the Salesforce Lightning Platform landing page. It features a large blue background with a repeating pattern of icons related to technology and data. On the left, there is a large image of a computer monitor displaying the Salesforce Lightning Platform interface, which includes various charts, graphs, and data tables. To the right, there is a white sidebar with the Salesforce logo and the text 'lightning platform'. Below the logo, it says 'Get your very own Developer Edition' and 'A full-featured copy of Lightning Platform, for FREE.' There is a form with fields for 'Name' (First and Last), 'Email' (Your email address), 'Role' (Your job role), 'Company' (Company Name), and 'Country' (Your country). The top right corner of the screen shows system status: 28°C Haze, ENG IN, 1:13 PM, and 10/18/2023.

Account Activation

Activation tracks information about devices from which users have verified their identity.



Screenshot of the Salesforce Setup Home page.

The page title is "Home | Salesforce".

The left sidebar includes:

- Setup Home
- Service Setup Assistant
- Commerce Setup Center
- Multi-Factor Authentication Assistant
- Hyperforce Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer
- ADMINISTRATION
 - Users
 - Data
 - Email
- PLATFORM TOOLS
 - Apps
 - Feature Settings
 - Slack

The main content area features three cards:

- Get Started with Einstein Bots**: Launch an AI-powered bot to automate your digital connections. [Get Started](#)
- Mobile Publisher**: Use the Mobile Publisher to create your own branded mobile app. [Learn More](#)
- Real-time Collaborative Docs**: Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce. [Get Started](#)

A section titled "Most Recently Used" shows two items:

| NAME | TYPE | OBJECT |
|-----------------|--------------------------|--------|
| Position | Custom Object Definition | |
| Recruiting work | Custom Report Type | |

The taskbar at the bottom includes icons for various applications and the Windows Start button. The system tray shows the date (29-10-2023), time (18:40), temperature (26°C), and weather (Mostly cloudy).

2.2 Object Creation

Salesforce objects are database tables that permit you to store data that is specific to an organization. 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: job posting sites, Reviews and Job posting

Create the Job posting site Object

The screenshot shows the Salesforce Setup interface, specifically the Object Manager. A custom object named "Job posting site" is being edited. The "Custom Object Definition Edit" screen displays the following details:

- Custom Object Information:**
 - Label: Job posting site (Example: Account)
 - Plural Label: Job posting sites (Example: Accounts)
 - Starts with vowel sound:
- Object Name:** Job_posting_site (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (radio button selected)
- Content Name:** None

The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.

Create the Job posting Object

The screenshot shows the Salesforce Setup interface under the Object Manager. A sidebar on the left lists various object configuration options like Fields & Relationships, Page Layouts, and Record Types. The main pane displays the 'Edit Custom Object' screen for 'Job posting'. Key fields include:

- Custom Object Information:** Label is set to 'Job posting' (Example: Account), Plural Label is 'Job postings' (Example: Accounts), and 'Starts with vowel sound' is unchecked.
- Object Name:** Object Name is 'Job_posting' (Example: Account).
- Description:** A large text area with a WYSIWYG editor icon.
- Context-Sensitive Help Setting:** Set to 'Open the standard Salesforce.com Help & Training window'.
- Content Name:** Set to 'None'.

At the bottom, there's a note about Record Name and Format, and a 'Help for this Page' link.

Create the Review Object

The screenshot shows the Salesforce Setup interface under the Object Manager. A sidebar on the left lists various object configuration options like Fields & Relationships, Page Layouts, and Record Types. The main pane displays the 'Edit Custom Object' screen for 'Review'. Key fields include:

- Custom Object Information:** Label is set to 'Review' (Example: Account), Plural Label is 'Reviews' (Example: Accounts), and 'Starts with vowel sound' is unchecked.
- Object Name:** Object Name is 'Review_number' (Example: Account).
- Description:** A large text area with a WYSIWYG editor icon.
- Context-Sensitive Help Setting:** Set to 'Open the standard Salesforce.com Help & Training window'.
- Content Name:** Set to 'None'.

At the bottom, there's a note about Record Name and Format, and a 'Help for this Page' link.

Create the junction object

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for WhatsApp, GitHub, Student, Home | Salesforce, and Job posting | Salesforce. The main page title is "Job posting". On the left, a sidebar lists various configuration options under "Fields & Relationships". The central panel displays the details for the "Job_posting_Number" field, which is of type "Auto Number". The right side of the screen shows a "Field Information" section with fields like Field Label, Data Type, Description, Data Owner, Field Usage, Data Sensitivity Level, Compliance Categorization, and Display Format. A "Help for this Page" link is located in the top right corner.

2.3 Tabs

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for WhatsApp, GitHub, Student, Home | Salesforce, and Tabs | Salesforce. The main page title is "Tabs". The left sidebar has sections for Feature Settings (Analytics, Tableau, Tableau Embedding), User Interface (Loaded Console Tab Limit, Rename Tabs and Labels), and Tabs (which is currently selected). The central panel shows the "Edit Custom Object Tab" page for the "Reviews" object. It includes fields for Tab Label (set to "Reviews"), Object (set to "Review"), and Tab Style (set to "Heart"). There is also a dropdown for Splash Page Custom Link set to "None". A large text area for Description is present, along with "Save" and "Cancel" buttons at the bottom. A "Help for this Page" link is located in the top right corner.

Screenshot of the Salesforce Setup interface showing the creation of a custom object tab named "Job postings".

The left sidebar shows the "Tabs" section under "User Interface".

The main area displays the "Edit Custom Object Tab" page for "Job postings".

Custom Tab Definition Edit

Custom Object Tab Information

| | |
|-----------|--------------|
| Tab Label | Job postings |
| Object | Job posting |
| Tab Style | Books |

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: None

Description: (Empty text area)

Save Cancel

Screenshot of the Salesforce Setup interface showing the creation of a custom object tab named "Positions".

The left sidebar shows the "Tabs" section under "User Interface".

The main area displays the "Edit Custom Object Tab" page for "Positions".

Custom Tab Definition Edit

Custom Object Tab Information

| | |
|-----------|-----------|
| Tab Label | Positions |
| Object | Position |
| Tab Style | Gears |

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: None

Description: (Empty text area)

Save Cancel

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

- Tab Bar:** WhatsApp, GitHub - 21Z/Microsoft-Office-2, - Student, Home | Salesforce, Tabs | Salesforce.
- Header:** Search Setup.
- Left Sidebar:** Feature Settings (Analytics, Tableau, Tableau Embedding), User Interface (Loaded Console Tab Limit, Rename Tabs and Labels), and Tabs (selected).
- Main Content:**
 - Section Header:** Custom Tabs.
 - Description:** You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
 - Text:** Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
 - Table:** Custom Object Tabs
- Bottom Status Bar:** Web Tabs, https://curious-wolf-b58pkq-dev-ed.trailblaze.lightning.force.com/one/one.app#/setup/CustomTabs/home, Type here to search, 26°C Mostly cloudy, 18:55, ENG, 29-10-2023.

2.4 The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Create a Lightning App

The screenshot shows a custom Lightning App dashboard titled "Quarterly Performance". The main area features a line chart showing performance metrics from November to January. The Y-axis ranges from 0 to 500k, and the X-axis shows Nov, Dec, and Jan. The legend indicates three series: "Closed" (orange), "Goal" (green), and "Closed + Open (>70%)" (blue). Below the chart, a message encourages users to "Add the opportunities you're working on, then come back here to view your performance." To the right, there is an "Assistant" section with a cartoon illustration of a landscape and the message "Nothing needs your attention right now. Check back later."

The screenshot shows a custom Lightning App dashboard with two main sections: "Today's Events" and "Today's Tasks". Both sections feature cartoon illustrations of landscapes with various icons like balloons, a chair, and a radio tower. The "Today's Events" section has a small message at the bottom: "Add the opportunities you're working on, then come back here to view your performance."

The screenshot shows a custom Lightning App dashboard titled "Recently Viewed". It displays a list of recently viewed positions. The header includes buttons for "New", "Import", and "Change Owner". A search bar and filter options are also present. The main content area shows a message: "You haven't viewed any Positions recently. Try switching list views." At the bottom, there is a URL: https://curious-wolf-b58pkg-dev-ed.trailblaze.lightning.force.com/lightning/o/Position__c/list?filterName=Recent.

Job posting sites

Recently Viewed

0 items • Updated a few seconds ago

site Name

You haven't viewed any Job posting sites recently.
Try switching list views.

https://curious-wolf-b58pkg-dev-ed.trailblaze.lightning.force.com/lightning/o/job_posting_site_c/home

Windows Taskbar: Type here to search, File Explorer, Mail, Google Chrome, Microsoft Edge, File, Settings, Weather (26°C Mostly cloudy), ENG, 18:57, 29-10-2023

App Launcher

Search apps or items...

Visit AppExchange

Owner

| | | | | | |
|---------------------|--|---------------------|---|-----------------|--|
| Site.com | Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and... | Chatter | The Salesforce Chatter social network, including profiles and feeds | CRM 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 customer service... |
| Lightning Usage App | View Adoption and Usage Metrics for Lightning Experience | Digital Experiences | Manage content and media for all of your sites. | Commerce | Manage your store's products, catalogs, and pricebooks. |
| Playground Starter | Get started with your Trailhead Playground. | Bolt Solutions | Discover and manage business solutions designed for your industry. | Recruiting | Custom app for the HR department |
| Trailblazer | | | | | |

All Items

Windows Taskbar: Type here to search, File Explorer, Mail, Google Chrome, Microsoft Edge, File, Settings, Weather (26°C Mostly cloudy), ENG, 18:58, 29-10-2023

2.5 Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Fields in Job posting sites Objects

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for WhatsApp, GitHub, Student, Home, and the current page, Job posting site | Salesforce. Below the navigation is a search bar and a toolbar with various icons. The main area displays the 'Job posting site' object setup page. On the left, a sidebar lists options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area shows the 'Job posting site Custom Field' definition. It includes sections for Field Information (Field Label: Job posting site, Field Name: Job_posting_site, API Name: Job_posting_site__c, Description: Help Text, Data Owner: CSE KIRUTHIKA D, Data Type: Picklist, Object Name: Job posting site), General Options (Required: checked, Default Value: [New]), and Picklist Options (Restrict picklist to the values defined in the value set: checked, Controlling Field: [New]). Buttons at the top of this section include Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?. A validation rules section is also present. The bottom of the page shows the Windows taskbar with various pinned apps and system status indicators.

Screenshot of the Salesforce Setup interface showing the configuration of a custom field named "Status" for the "Job posting site" object.

Job posting site Custom Field Status

Custom Field Definition Detail

| Field Label | Status | Object Name | job_posting_site |
|---------------------------|-----------|-------------|------------------|
| Field Name | Status | Data Type | Picklist |
| API Name | Status__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |

Created By: CSE KIRUTHIKA D. 18/10/2023, 9:28 pm Modified By: CSE KIRUTHIKA D. 18/10/2023, 9:28 pm

General Options

| Required | <input type="checkbox"/> |
|---------------|--------------------------|
| Default Value | <input type="text"/> |

Picklist Options

Restrict picklist to the values defined in the value set ✓

Controlling Field: [New]

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Type here to search 26°C Mostly cloudy 19:00 ENG 29-10-2023

Screenshot of the Salesforce Setup interface showing the configuration of a custom field named "Technical site" for the "Job posting site" object.

Job posting site Custom Field Technical site

Custom Field Definition Detail

| Field Label | Technical site | Object Name | job_posting_site |
|---------------------------|-------------------|-------------|------------------|
| Field Name | Technical_site | Data Type | Checkbox |
| API Name | Technical_site__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |

Created By: CSE KIRUTHIKA D. 18/10/2023, 9:22 pm Modified By: CSE KIRUTHIKA D. 18/10/2023, 9:22 pm

General Options

| Default Value | Unchecked |
|---------------|-----------|
|---------------|-----------|

Field Dependencies

No dependencies defined.

Validation Rules

Type here to search 26°C Mostly cloudy 19:00 ENG 29-10-2023

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Job posting site

Description

Job posting site Custom Field

Back to Job posting site

Custom Field Definition Detail

Field Information

| | | | |
|---------------------------|----------------|-------------|------------------|
| Field Label | Description | Object Name | Job posting site |
| Field Name | Description | Data Type | Text Area |
| API Name | Description__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |

Created By: CSE KIRUTHIKA D. 18/10/2023, 9:23 pm

Modified By: CSE KIRUTHIKA D. 18/10/2023, 9:23 pm

General Options

Required:

Default Value:

Validation Rules

New

No validation rules defined.

Help for this Page

Fields & Relationships

- Details
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Help for this Page

Always show me more records per related list

Type here to search

26°C Mostly cloudy

19:01

ENG 29-10-2023

Creating a Job posting

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main title is "Edit Job posting Custom Field" under "Job posting site". A sub-header says "Step 1. Choose the field type". The page content asks to specify the type of information the custom field will contain. It lists three options: "None Selected", "Lookup Relationship", and "Master-Detail Relationship". The "Master-Detail Relationship" option is selected. A detailed description explains that it creates a special parent-child relationship where ownership and sharing are determined by the master record. Buttons for "Next" and "Cancel" are at the bottom right.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main title is "Edit Relationship" under "Job posting". A sub-header says "Step 2 of 4". The page content asks to enter the label and name for the lookup field. Fields include "Field Label" (Job posting site), "Field Name" (Job_posting), "Description" (Job posting site URL), and "Help Text". A "Child Relationship Name" field is set to "Job_postings". Under "Sharing Setting", the "Read Only" option is unselected and the "Read/Write" option is selected. Under "Allow reparenting", the checkbox is unchecked. A "Lookup Filter" section is at the bottom. Buttons for "Previous", "Save", "Next", and "Cancel" are at the bottom right.

Screenshot of the Salesforce Setup interface showing the Object Manager for the 'Job posting' object.

The main page displays the 'Job posting Field' named 'Job_posting_Number'. The 'Field Information' section shows the following details:

| | Field Label | Job_posting_Number | Field Name | Name |
|---------------------------|----------------|--------------------|------------|------|
| Data Type | Data Type | Auto Number | | |
| Description | | | | |
| Data Owner | | | | |
| Field Usage | | | | |
| Data Sensitivity Level | | | | |
| Compliance Categorization | Display Format | JOBPOST-{0000} | | |

The left sidebar lists various setup options for the 'Job posting' object, including Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.

Screenshot of the Salesforce Setup interface showing the 'Object Manager' step 1: Choose the field type.

The page title is 'Edit Job posting Custom Field Position'. The header indicates 'Step 1'.

The 'Data Type' section contains the following options:

- None Selected
- Lookup Relationship
- Master-Detail Relationship

Descriptions for each option are provided:

- None Selected: Select one of the data types below.
- Lookup Relationship: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Buttons at the bottom right include 'Next' and 'Cancel'.

Screenshot of the Salesforce Object Manager setup page for creating a new lookup field.

Step 2. Enter the label and name for the lookup field

Field Label: Position

Field Name: Position

Description: (empty)

Help Text: (empty)

Child Relationship Name: Job_postings

Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records.

- Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
- Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: Child records can be reparented to other parent records after they are created

Lookup Filter: Waiting for curious-wolf-b58pkg-dev-ed.trailblaze.my.salesforce.com...

Step 2 of 4

Previous Save Next Cancel

Screenshot of the Salesforce Object Manager Fields & Relationships page for the Job posting object.

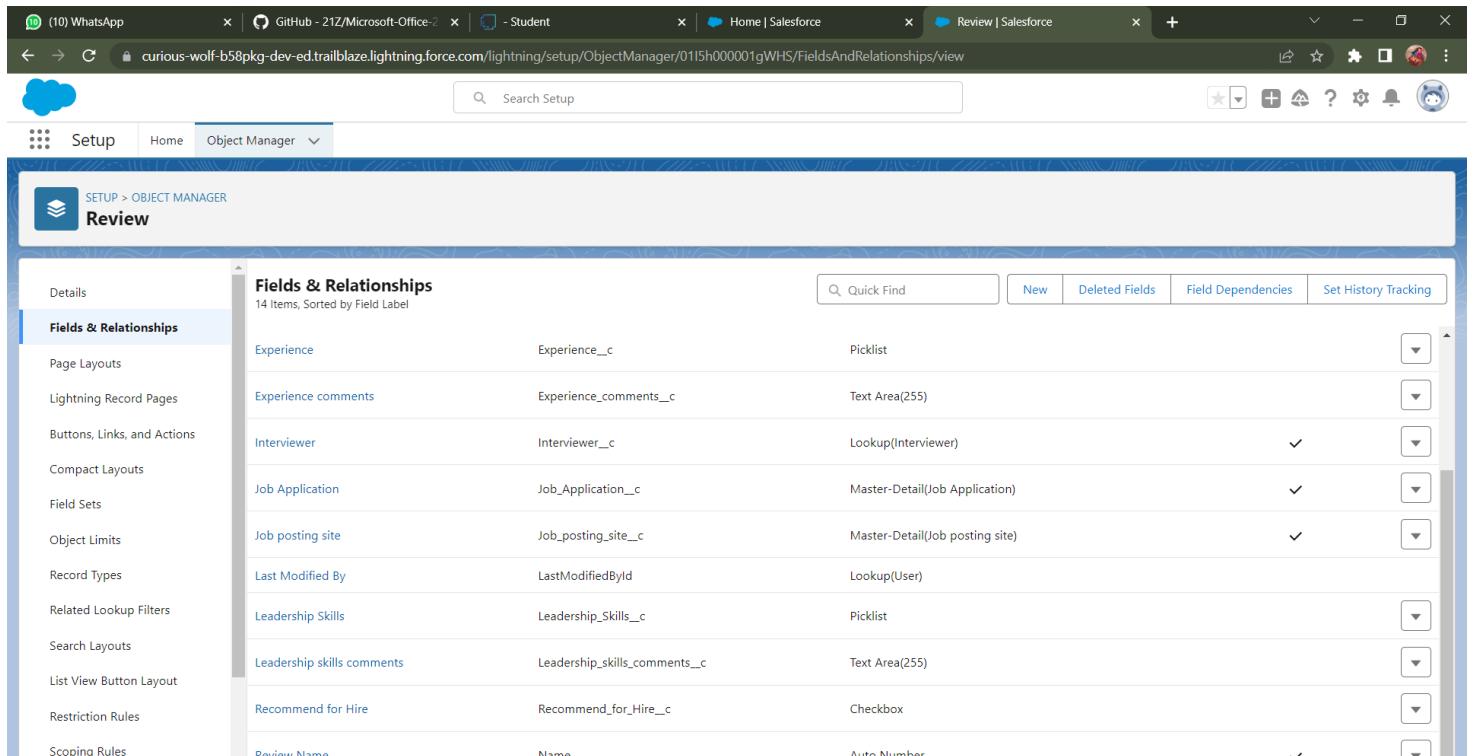
Fields & Relationships (5 items, Sorted by Field Label)

| 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) | | ✓ |
| Job_posting_Number | Name | Auto Number | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Position | Position_c | Master-Detail(Position) | | ✓ |

Details

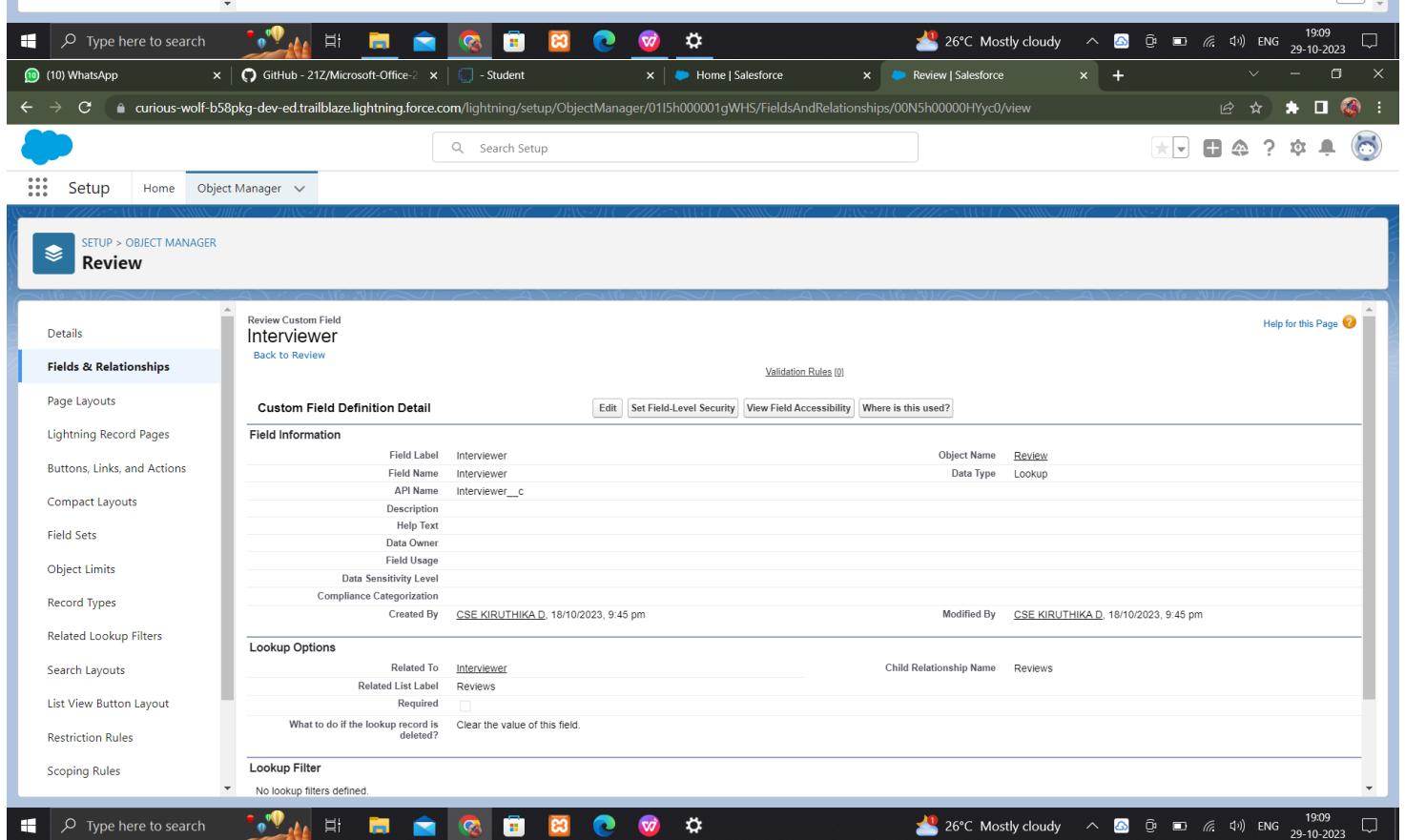
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Create fields for review



The screenshot shows the Salesforce Object Manager Fields & Relationships page. The left sidebar lists various setup categories. The main area displays a table of fields under the heading "Fields & Relationships".

| Field Name | Label | Type |
|----------------------------|-------------------------------|---------------------------------|
| Experience | Experience__c | Picklist |
| Experience comments | Experience_comments__c | Text Area(255) |
| Interviewer | Interviewer__c | Lookup(Interviewer) |
| Job Application | Job_Application__c | Master-Detail(Job Application) |
| Job posting site | Job_posting_site__c | Master-Detail(Job posting site) |
| Last Modified By | LastModifiedBy | Lookup(User) |
| Leadership Skills | Leadership_Skills__c | Picklist |
| Leadership skills comments | Leadership_skills_comments__c | Text Area(255) |
| Recommend for Hire | Recommend_for_Hire__c | Checkbox |
| Review Name | Name | Auto Number |



The screenshot shows the Interviewer custom field detail page. The left sidebar lists various setup categories. The main area displays the "Custom Field Definition Detail" for the Interviewer field.

Custom Field Definition Detail

| Field Information | Object Name | Review |
|---|---------------------|-------------------|
| Field Label: Interviewer Field Name: Interviewer API Name: Interviewer__c Description: Help Text Data Owner: Field Usage Data Sensitivity Level: Compliance Categorization Created By: CSE KIRUTHIKA D, 18/10/2023, 9:45 pm | Object Name: Review | Data Type: Lookup |
| Modified By: CSE KIRUTHIKA D, 18/10/2023, 9:45 pm | | |

Lookup Options

| Related To | Child Relationship Name | Reviews |
|--|-------------------------|---------|
| Related List Label: Reviews Required: <input checked="" type="checkbox"/> | | |

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

Lookup Filter

No lookup filters defined.

Screenshot of the Salesforce Setup interface showing the 'Edit Review Custom Field' page for the 'Job Application' object.

The 'Field Information' section contains the following details:

- Field Label: Job Application
- Field Name: Job_Application
- Description: (empty)
- Help Text: (empty)
- Data Owner: User
- Field Usage: --None--
- Data Sensitivity Level: --None--
- Compliance Categorization:
 - Available: PII, HIPAA, GDPR, PCI
 - Chosen: (empty)

The 'Master-Detail Options' section shows 'Related To' set to 'Job Application' and 'Child Relationship Name' set to 'Reviews'.

Screenshot of the Salesforce Setup interface showing the 'Edit Review Custom Field' page for the 'Job Application' object.

The 'Field Information' section contains the following details:

- Field Label: Job Application
- Field Name: Job_Application
- Description: (empty)
- Help Text: (empty)
- Data Owner: User
- Field Usage: --None--
- Data Sensitivity Level: --None--
- Compliance Categorization:
 - Available: PII, HIPAA, GDPR, PCI
 - Chosen: (empty)

The 'Master-Detail Options' section shows 'Related To' set to 'Job Application' and 'Child Relationship Name' set to 'Reviews'.

Screenshot of the Salesforce Setup interface showing the Object Manager for the 'Review' object.

Details

Fields & Relationships (selected)

Review Name

[Back to Review](#)

[Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

| | | | |
|---------------------------|-------------|------------|------|
| Field Label | Review Name | Field Name | Name |
| Data Type | Auto Number | | |
| Description | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Display Format | REV-{0000} | | |

Related Navigation

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Help for this Page

Screenshot of the Salesforce Setup interface showing the Object Manager for the 'Review' object.

Details

Fields & Relationships (selected)

14 Items, Sorted by Field Label

[Quick Find](#) [New](#) [Deleted Fields](#) [Field Dependencies](#) [Set History Tracking](#)

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|----------------------------------|-------------------------------------|---------------------------------|-------------------|---------|
| Core competencies | Core_competencies__c | Picklist | | |
| Created By | CreatedById | Lookup(User) | | |
| Enter core competencies comments | Enter_core_competencies_comments__c | Text Area(255) | | |
| Enter reason recommended | Enter_reason_recommended__c | Text Area(255) | | |
| Experience | Experience__c | Picklist | | |
| Experience comments | Experience_comments__c | Text Area(255) | | |
| Interviewer | Interviewer__c | Lookup(Interviewer) | | |
| Job Application | Job_Application__c | Master-Detail(Job Application) | | |
| Job posting site | Job_posting_site__c | Master-Detail(Job posting site) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |

Related Navigation

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

26°C Mostly cloudy 19:12 29-10-2023

Create a Master detail relationship

The screenshot shows the Salesforce Object Manager setup page for creating a custom field. The title bar includes tabs for WhatsApp, GitHub, Student, Home | Salesforce, and Object Manager | Salesforce. The main header has a search bar and various icons. The left sidebar shows 'SETUP' and 'Object Manager'. The main content area is titled 'Job Application' under 'Edit Review Custom Field'. It's Step 1 of 4, 'Choose the field type'. The 'Data Type' section shows three options: 'None Selected' (selected), 'Lookup Relationship', and 'Master-Detail Relationship' (selected). A detailed description for 'Master-Detail Relationship' explains it creates a parent-child relationship where ownership and sharing are determined by the master record. Buttons for 'Next' and 'Cancel' are at the bottom right.

The screenshot shows the Salesforce Object Manager setup page for creating a lookup field. The title bar and sidebar are identical to the previous screenshot. The main content area is titled 'Review' under 'Edit Relationship'. It's Step 2 of 4, 'Enter the label and name for the lookup field'. The form fields include 'Field Label' (Job Application), 'Field Name' (Job_Application), 'Description' (empty), 'Help Text' (empty), 'Child Relationship Name' (Reviews), 'Sharing Setting' (Read Only selected), 'Allow reparenting' (unchecked), and a 'Lookup Filter' section. Buttons for 'Previous', 'Save', 'Next', and 'Cancel' are at the bottom right.

The screenshot shows the Salesforce Object Manager setup interface. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main title is "Object Manager". Below it, the section title is "Job posting site". A sub-section title "Step 1. Choose the field type" is displayed. The sub-section title "Data Type" is shown. Under "Data Type", there are three options: "None Selected", "Lookup Relationship", and "Master-Detail Relationship". The "Master-Detail Relationship" option is selected. A detailed description of Master-Detail Relationships follows, mentioning they allow users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list. Buttons for "Next" and "Cancel" are visible at the bottom right.

The screenshot shows the Salesforce Object Manager setup interface. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main title is "Object Manager". Below it, the section title is "Review". A sub-section title "Step 2. Enter the label and name for the lookup field" is displayed. The sub-section title "Field Label" is shown with the value "Job posting site". The sub-section title "Field Name" is shown with the value "Job_posting_site". The sub-section title "Description" has an empty input field. The sub-section title "Help Text" has an empty input field. The sub-section title "Child Relationship Name" is shown with the value "Reviews". The sub-section title "Sharing Setting" has a note: "Select the minimum access level required on the Master record to create, edit, or delete related Detail records." It includes two radio button options: "Read Only" (unchecked) and "Read/Write" (checked). The sub-section title "Allow reparenting" has a note: "Child records can be reparented to other parent records after they are created." A checkbox next to this note is unchecked. A "Lookup Filter" section is partially visible at the bottom. Buttons for "Previous", "Save", "Next", and "Cancel" are visible at the bottom right.

The screenshot shows the Salesforce Object Manager setup interface. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main title is "Object Manager" under the "SETUP" tab. Below the title, there are two tabs: "Edit Relationship" and "Review". The current view is "Review". The main content area is titled "Step 3. Establish field-level security for reference field" and is labeled "Step 3 of 4". It displays field details: Field Label (Job posting site), Data Type (Master-Detail), Field Name (Job_posting_site), and Description. A note states: "These are the field-level settings for a Master-Detail relationship. They cannot be changed." A table titled "Field-Level Security for Profile" lists various profiles and their visibility and read-only status. The table has columns for "Visible" (checkbox) and "Read-Only" (checkbox). Most profiles have the "Visible" checkbox checked, while the "Read-Only" checkbox is mostly unchecked. The table includes profiles like Abhilash Garapati, Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, and Custom: Sales Profile.

The screenshot shows the Salesforce Object Manager setup interface. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main title is "Object Manager" under the "SETUP" tab. Below the title, there are two tabs: "Edit Relationship" and "Review". The current view is "Review". The main content area is titled "Step 4. Add custom related lists" and is labeled "Step 4 of 4". It displays field details: Field Label (Job posting site), Data Type (Master-Detail), Field Name (Job_posting_site), and Description. A note asks: "Specify the title that the related list will have in all of the layouts associated with the parent." A text input field shows the value "Reviews". At the bottom right, there are buttons for "Previous", "Save & New", "Save", and "Cancel". The status bar at the bottom of the screen shows system information: 26°C Mostly cloudy, ENG, 19:16, 29-10-2023.

PAGE LAYOUTS

Screenshot of the Salesforce Object Manager - Page Layouts page.

The page shows a list of Page Layouts:

| PAGE LAYOUT NAME | CREATED BY | MODIFIED BY |
|------------------|--------------------------------------|--------------------------------------|
| Review Layout | CSE KIRUTHIKA D, 18/10/2023, 9:04 pm | CSE KIRUTHIKA D, 29/10/2023, 7:16 pm |

The sidebar on the left lists various setup categories:

- Details
- Fields & Relationships
- Page Layouts** (selected)
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Screenshot of the Review Layout page.

The page displays the layout configuration for the "Review Layout".

Layout Properties:

- Save
- Quick Save
- Preview As...
- Cancel
- Undo
- Redo
- Layout Properties

Fields:

| Section | Enter core compet... | Interviewer | Leadership skills... |
|-------------------|----------------------|------------------|----------------------|
| Blank Space | Enter reason reco... | Job Application | Leadership skills... |
| Core competencies | Experience | Job posting site | Recommend for Hire |
| Created By | Experience comments | Last Modified By | Review Name |

Review Sample:

Customize the highlights panel for this page layout...

Highlights Panel:

Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

Quick Actions in the Salesforce Classic Publisher:

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Salesforce Mobile and Lightning Experience Actions:

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Salesforce Mobile and Lightning Experience Actions section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

The sidebar on the left lists various setup categories, identical to the first screenshot.

Screenshot of the Salesforce Setup interface showing the Object Manager - Review page.

The left sidebar navigation includes:

- Details
- Fields & Relationships
- Page Layouts** (selected)
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

The main content area displays the Page Layout configuration screen. The top bar includes Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties buttons. A search bar at the top right says "Search Setup".

The Fields section shows a table with columns: Field Name, Type, and Description. The table includes:

| Field Name | Type | Description |
|---------------------|-----------|-------------------------|
| Section | Section | Enter core competencies |
| Blank Space | Text Area | Interviewer |
| Core competencies | Text Area | Job Application |
| Experience | Text Area | Leadership skills... |
| Created By | Text Area | Job posting site |
| Experience comments | Text Area | Recommend for Hire |
| Last Modified By | Text Area | Review Name |

Below the table, there are sections for System Information (Header visible on edit only) and Custom Link (Header visible on edit only). The Mobile Cards section is also present.

The bottom taskbar shows the Windows Start button, a search bar with "Type here to search", pinned app icons (File Explorer, Mail, Google Chrome, etc.), and system status indicators (26°C, Mostly cloudy, ENG, 19:19, 29-10-2023).

Screenshot of the Salesforce Setup interface showing the Object Manager for the Review object. The 'Page Layouts' tab is selected. A modal dialog is open for 'Section Properties' with the following settings:

- Section Name:** New Section
- Display Section Header On:** Detail Page (checked), Edit Page (checked)
- Layout:** 2-Column
- Tab-key Order:** Left-Right

The main page layout editor shows a grid of fields including 'Section', 'Blank Space', 'Core competencies', 'Experience', 'Created By', 'Experience comments', 'Last Modified By', and 'Review Name'. The 'Review Detail' section contains sample data rows.

Screenshot of the Salesforce Setup interface showing the Object Manager for the Review object. The 'Page Layouts' tab is selected. A modal dialog is open for 'Section Properties' with the following settings:

- Section Name:** New Section
- Display Section Header On:** Detail Page (checked), Edit Page (checked)
- Layout:** 2-Column
- Tab-key Order:** Left-Right

The main page layout editor shows a grid of fields including 'Section', 'Blank Space', 'Core competencies', 'Experience', 'Created By', 'Experience comments', 'Last Modified By', and 'Review Name'. The 'Review Detail' section contains sample data rows. The 'Standard Buttons' bar at the top right includes 'Edit', 'Delete', 'Clone', 'Change Owner', 'Change Record Type', and 'Printable View'.

Salesforce - Developer Edition - Google Chrome

curious-wolf-b58pk-dev-ed.trailblaze.my.salesforce.com/setup/layout/preview.jsp?isdtp=p1

Home | Salesforce Review | Salesforce

01I5h00000gWHS/PageLayouts/00h5h00000HKKHQAA5/view

salesforce 24

Preview Edit Page Refresh Preview Close Select a profile: Abhilash Garapati

Below is the detail page for the **Review Layout** page layout and **Abhilash Garapati** profile. The field-level security settings of this profile can hide fields.

Note that profile permissions can alter which fields or buttons are visible for users with certain profiles. Permissions-based changes are not shown in this preview.

Edit Delete Clone

New Section

Job Application: Sample Text Job posting site: Sample Text

Review Name: GEN-2004-001234

Core competencies: 1 Leadership Skills: 1

Leadership skills comments: 1 Experience: 1

Enter core competencies comments: Sample Text

Leadership skills comments: Sample Text

Experience comments: Sample Text

Recommend for Hire:

Enter reason recommended: Sample Text

Interviewer: Sample Text

Properties

| | |
|------------------|----------------------|
| Reviewer | Leadership Skills |
| Job Application | Leadership skills... |
| Job posting site | Recommend for Hire |
| Modified By | Review Name |

Last Modified By: Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only) Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

Notes & Attachments This list is not customizable

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

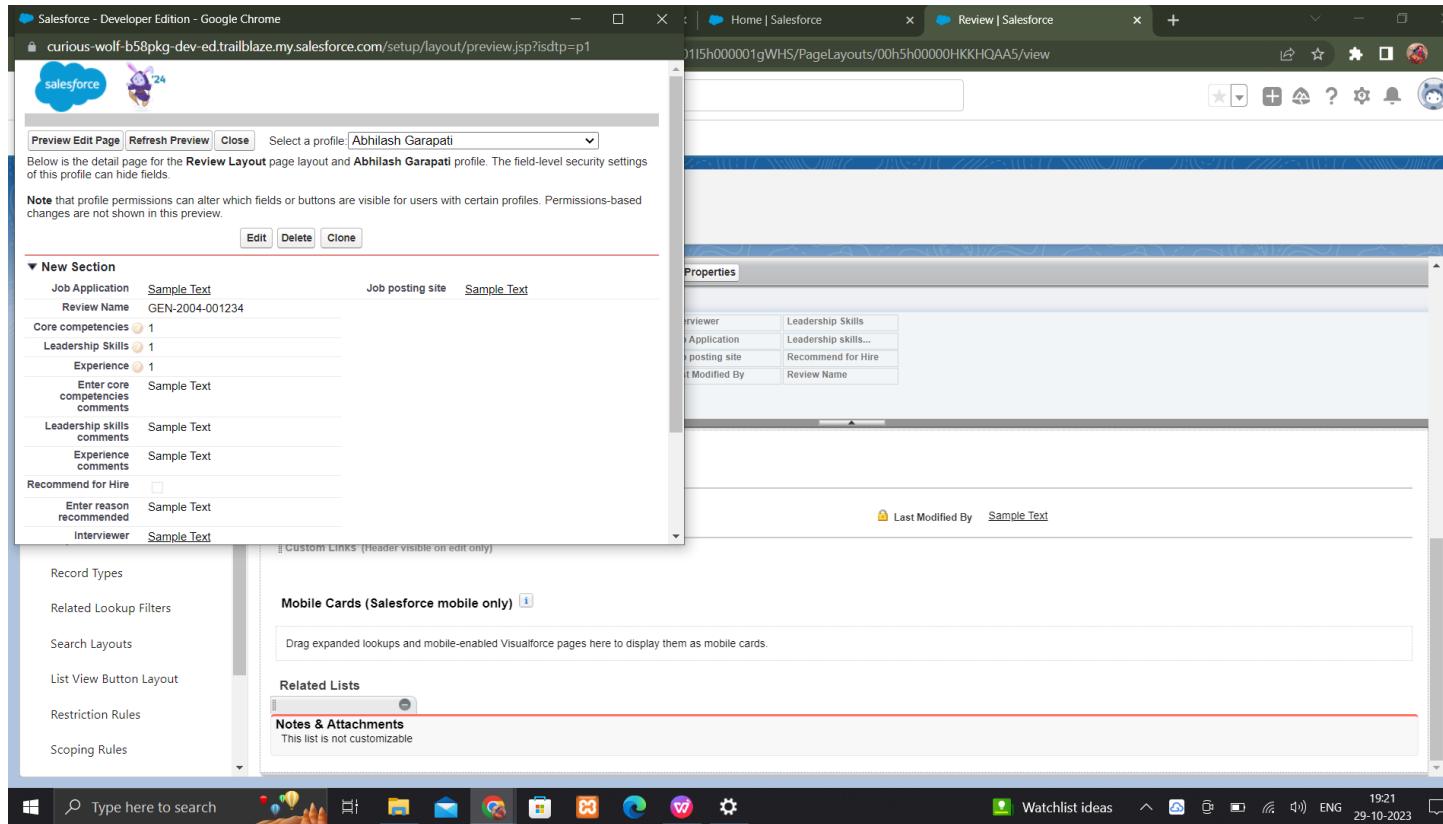
Restriction Rules

Scoping Rules

Type here to search

Watchlist ideas

19:21 ENG 29-10-2023



The screenshot shows the Salesforce Object Manager interface for the 'Position' object. The left sidebar has 'Page Layouts' selected. The main area displays a table titled 'Page Layouts' with one item: 'Position Layout'. The table includes columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'Position Layout' was created by 'CSE KIRUTHIKA D' on 18/10/2023 at 8:51 pm, and last modified by 'CSE KIRUTHIKA D' on 27/10/2023 at 9:23 pm.

| PAGE LAYOUT NAME | CREATED BY | MODIFIED BY |
|------------------|--------------------------------------|--------------------------------------|
| Position Layout | CSE KIRUTHIKA D, 18/10/2023, 8:51 pm | CSE KIRUTHIKA D, 27/10/2023, 9:23 pm |

The screenshot shows the Salesforce Page Layout editor for the 'Position Layout'. The left sidebar has 'Page Layouts' selected. The main area shows the layout configuration. The 'Fields' section contains fields for 'Section', 'Blank Space', 'Approval Status', 'Hiring Manager', 'Created By', 'Job Description', 'Department', 'Education', 'Last Modified By', 'Legacy Position N...', 'Salary Range', 'Location', 'Skills Required', and 'Owner'. Below the layout editor is a 'Position Sample' section and a 'Highlights Panel' with a note about customizing highlights. At the bottom, there are sections for 'Quick Actions in the Salesforce Classic Publisher' and 'Salesforce Mobile and Lightning Experience Actions'.

The screenshot shows the Salesforce Setup interface for the Position object. The left sidebar lists various setup categories, and the main area displays the Page Layouts configuration for the Position object.

Page Layouts Section:

- Salary:** Fields: Salary Range, Sample Text, Pay Grade, Sample Text.
- Experience & Education:** Fields: Skills Required, Sample Text, Education, Sample Text.
- System Information:** Fields: Created By, Sample Text, Last Modified By, Sample Text.
- Mobile Cards (Salesforce mobile only):** A placeholder for dragging expanded lookups and mobile-enabled Visualforce pages.
- Related Lists:**
 - Approval History:** Fields: Date (29/10/2023, 7:22 pm), Status (Sample Text), Assigned To (Sarah Sample), Actual Approver (Sarah Sample), Comments (Sample Text).
 - Job Applications:** Fields: Job Application Name (New | Change Owner).
 - Interviewers:** Fields: Interviewer No. (Sample Text).
 - Job postings:** Fields: Job posting site: Status (Sample Text), Job posting site: Technical site (checked).

System Information:

- Type here to search
- 26°C Mostly cloudy
- ENG 29-10-2023

Salesforce - Developer Edition - Google Chrome

curious-wolf-b58pkg-dev-ed.trailblaze.my.salesforce.com/setup/layout/preview.jsp?isdtp=p1

The screenshot shows the Salesforce Layout Preview page for the Position layout. The preview is set for the Event user profile. The layout includes sections for Information, System Information, Approval History, Job Applications, and a sidebar with various configuration options like Record Types and Related Lookup Filters.

Position | Salesforce

Home | Salesforce

01I5h000001gWHL/PageLayouts/00h5h00000HKH9AAP/view

Custom Console Components Mini Page Layout Mini Console View Video Tutorial Help for this Page

Properties

| | | | |
|---------------------|------------------|-----------------|--------|
| Created By | Last Modified By | Pay Grade | Title |
| Sample Text | Sample Text | Salary Range | |
| Created Date | Approval Status | Skills Required | |
| 29/10/2023, 7:23 pm | Approved | Location | |
| | | Job Description | |
| | | Owner | Status |

Approval History

| Date | Status | Assigned To | Actual Approver | Comments |
|---------------------|----------|-------------|-----------------|-------------|
| 29/10/2023, 7:23 pm | Approved | | | Sample Text |

Job Applications

New Job Application

Job Application Name

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Type here to search

26°C Mostly cloudy

ENG 29-10-2023

(10) WhatsApp GitHub - 21Z/Microsoft-Office-2 - Student Home | Salesforce Position | Salesforce

curious-wolf-b58pkg-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/01I5h000001gWHL/PageLayouts/00h5h00000HKH9AAP/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Position

Details

Fields & Relationships

Page Layouts

- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Position Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

| Section | Department | Last Modified By | Pay Grade | Title |
|-----------------|-----------------|----------------------|-----------------|-------|
| Blank Space | Education | Legacy Position N... | Salary Range | |
| Approval Status | Hiring Manager | Location | Skills Required | |
| Created By | Job Description | Owner | Status | |

Position Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Earnings upcoming

ENG 29-10-2023

VALIDATION RULES :

Create a validation rule phone__c

The screenshot shows the Salesforce Setup interface for managing object types. The main title is "Phone" under "SETUP > OBJECT MANAGER". On the left, a sidebar lists various configuration tabs: 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, and Flow Triggers. The "Details" tab is selected. The main content area displays the "Details" section for the "Phone" object. It includes fields for Description, API Name (set to "Phone_c"), Singular Label (set to "Phone"), Plural Label (set to "Phones"), and several checkboxes for reporting and tracking features like Enable Reports, Track Activities, and Track Field History. Deployment status is set to "Deployed" and Help Settings point to the standard salesforce.com Help Window.

The screenshot shows the Salesforce Setup interface for selecting an object type. The main title is "Object Manager". The "Data Type" section is displayed, showing a list of options with "Phone" selected. Other options include None Selected, Auto Number, Checkbox, Currency, Date, Date/Time, Email, Number, Percent, Picklist, Picklist (Multi-Select), Text, Text Area, Text Area (Long), and Time. Each option has a brief description of its functionality. The Windows taskbar at the bottom shows various open applications like WhatsApp, GitHub, and Microsoft Office, along with system icons for weather, battery, and connectivity.

Screenshot of the Salesforce Object Manager setup page for editing a custom field named "Phone".

Step 2. Enter the details

Field Label: Phone

Field Name: Phone

Description: (empty)

Help Text: (empty)

Required: Always require a value in this field in order to save a record.

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes. ("the_text"), include numbers without quotes : (25), show percentages as decimals (.10), and express date calculations in the standard format. (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadataType__RecordName.Field__c

Buttons: Previous, Save, Next, Cancel

Screenshot of the Salesforce Validation Rules setup page for creating a validation rule for the "Phone" field.

Validation Rule Edit

Rule Name: Phone_number_validation_rule

Active:

Description: phone number should not be more than or less than 10 digits

Error Condition Formula:

```
NOT( OR( REGEX( Phone__c , "[^0-9]{10}" )) )
```

Functions:

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Buttons: Save, Save & New, Cancel

The screenshot shows the Salesforce Object Manager interface for the 'Phone' object. On the left, a sidebar lists various configuration tabs: 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, and Flow Triggers. The 'Validation Rules' tab is selected. In the main area, there is a formula editor for defining validation logic. The formula is:

```
NOT(OR(REGEX(Phone__c, "^[0-9]{10}")))
```

Below the formula, there is a section for the 'Error Message'. It includes an example message 'Discount percent cannot exceed 30%' and a note that it will appear when the error condition is true. The actual error message is 'Please give a valid phone number'. The 'Error Location' is set to 'Field' and 'Owner'. At the bottom right of the main area are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the 'Phone Validation Rule' detail page. The page title is 'Phone Validation Rule' with a 'Back to Phone' link. The 'Validation Rule Detail' section contains the following information:

| Rule Name | Phone_number_validation_rule | Active |
|-------------------------|---|-------------------------------------|
| Error Condition Formula | NOT(OR(REGEX(Phone__c, "^[0-9]{10}"))) | <input checked="" type="checkbox"/> |
| Error Message | Please give a valid phone number | Error Location |
| Description | phone number should not be more than or less than 10 digits | Owner |
| Created By | CSE KIRUTHIKAD, 27/10/2023, 9:49 pm | Modified By |
| | | CSE KIRUTHIKAD, 29/10/2023, 7:27 pm |

At the bottom right of the page is a 'Help for this Page' link. The left sidebar is identical to the one in the first screenshot, listing the same configuration tabs for the Phone object.

10 WhatsApp | GitHub - 21Z/Microsoft-Office-2 | - Student | Home | Salesforce | Phone | Salesforce

curious-wolf-b58pkg-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/01Ish000000nvdK/ValidationRules/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Phone

Validation Rules
1 Items, Sorted by Rule Name

| RULE NAME | ERROR LOCATION | ERROR MESSAGE | ACTIVE | MODIFIED BY |
|------------------------------|----------------|----------------------------------|--------|--------------------------------------|
| Phone_number_validation_rule | Owner | Please give a valid phone number | ✓ | CSE KIRUTHIKA D, 29/10/2023, 7:27 pm |

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

Type here to search

26°C Mostly cloudy

19:28
29-10-2023

The screenshot shows the Salesforce Object Manager setup page for the 'Phone' object. The left sidebar lists various configuration tabs: 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, and Flow Triggers. The main area displays a formula editor for an error message condition. The formula input field contains the expression: `NOT(OR(REGEX(Phone__c , "^[0-9]{10}")))`. To the right of the formula is a 'Functions' dropdown menu showing categories like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc., with 'ABS(number)' selected. Below the formula is a 'Check Syntax' button. Under the 'Error Message' section, there is an example message: 'Discount percent cannot exceed 30%', a note about it appearing when the condition is true, and a text input field containing 'Please give a valid phone number'. The 'Error Location' dropdown is set to 'Field' with 'Phone' selected. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

CREATE A PROFILE

Create a profile

10 WhatsApp | GitHub - 21Z/Microsoft-Office-2 | - Student | Home | Salesforce | Profiles | Salesforce

curious-wolf-b58pkg-dev-ed.trailblaze.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup Home Object Manager

Search Setup

Profile Search: profi

Users Profiles

Profiles

Help for this Page

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

All Profiles | Edit | Delete | Create New View

New Profile

| Action | Profile Name | User License | Custom |
|--|-------------------------------------|----------------------------------|-------------------------------------|
| <input type="checkbox"/> Edit Del ... | Anilash Garapati | Salesforce | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Analytics Cloud Integration User | Analytics Cloud Integration User | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Analytics Cloud Security User | Analytics Cloud Integration User | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Authenticated Website | Authenticated Website | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Authenticated Website | Authenticated Website | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Del ... | B2B Reordering Portal Buyer Profile | External Apps Login | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Chatter External User | Chatter External | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Chatter Free User | Chatter Free | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Chatter Moderator User | Chatter Free | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Contract Manager | Salesforce | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Cross_Org Data Proxy User | XOrg Proxy User | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Del ... | Custom: Marketing Profile | Salesforce | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit Del ... | Custom: Sales Profile | Salesforce | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit Del ... | Custom: Support Profile | Salesforce | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Customer Community Login User | Customer Community Login | <input type="checkbox"/> |

1-25 of 44 0 Selected

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

Page 1 of 2

10 WhatsApp | GitHub - 21Z/Microsoft-Office-2 | - Student | Home | Salesforce | Profiles | Salesforce

curious-wolf-b58pkg-dev-ed.trailblaze.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup Home Object Manager

Search Setup

Profile Search: profi

Users Profiles

Profiles

Help for this Page

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

All Profiles | Edit | Delete | Create New View

New Profile

| Action | Profile Name | User License | Custom |
|--|---|------------------------|-------------------------------------|
| <input type="checkbox"/> Edit Del ... | Sales User | Salesforce | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Salesforce API Only System Integrations | Salesforce Integration | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Silver Partner User | Silver Partner | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Solution Manager | Salesforce | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Standard Platform User | Salesforce Platform | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Standard User | Salesforce | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Del ... | Support User | Salesforce | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | System Administrator | Salesforce | <input type="checkbox"/> |

1-8 of 8 0 Selected

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

Page 1 of 1

Screenshot of the Salesforce Setup interface showing the 'Profiles' section. A user profile named 'Event User profile' is being edited. The 'Custom Profile' checkbox is checked. The 'Custom App Settings' section shows various application visibility settings. A note at the bottom indicates that certain fields are required.

Profile Edit

Name: Event User profile

User License: Salesforce

Description:

Custom Profile:

Custom App Settings

| | Visible | Default | | Visible | Default |
|--|-------------------------------------|-----------------------|---|-------------------------------------|----------------------------------|
| All Tabs (standard__AllTabSet) | <input checked="" type="checkbox"/> | <input type="radio"/> | Recruiting (Recruiting) | <input type="checkbox"/> | <input type="radio"/> |
| Analytics Studio (standard__Insights) | <input checked="" type="checkbox"/> | <input type="radio"/> | Sales (standard__LightningSales) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| App Launcher (standard__AppLauncher) | <input checked="" type="checkbox"/> | <input type="radio"/> | Sales (standard__Sales) | <input checked="" type="checkbox"/> | <input checked="" type="radio"/> |
| Bolt Solutions (standard__LightningBolt) | <input checked="" type="checkbox"/> | <input type="radio"/> | Sales Console (standard__LightningSalesConsole) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Commerce (standard__Commerce) | <input checked="" type="checkbox"/> | <input type="radio"/> | Salesforce Chatter (standard__Chatter) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Community (standard__Community) | <input checked="" type="checkbox"/> | <input type="radio"/> | Sample Console (standard__ServiceConsole) | <input type="checkbox"/> | <input type="radio"/> |
| Content (standard__Content) | <input checked="" type="checkbox"/> | <input type="radio"/> | Service (standard__Service) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Data Manager (standard__DataManager) | <input checked="" type="checkbox"/> | <input type="radio"/> | Service Console | <input type="checkbox"/> | <input type="radio"/> |

Screenshot of the Salesforce Setup interface showing the 'Profiles' section. A user profile is being edited. The 'Custom Object Permissions' section lists various objects with their access levels. The 'Session Settings' section shows session timeout and security level requirements. The 'Password Policies' section defines password expiration and history rules.

Profile Edit

Name: Event User profile

User License: Salesforce

Description:

Custom Profile:

Custom Object Permissions

| | Basic Access | | | | Data Administration | |
|-------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| | Read | Create | Edit | Delete | View All | Modify All |
| Candidates | <input checked="" type="checkbox"/> |
| customers | <input checked="" type="checkbox"/> |
| Favorites | <input checked="" type="checkbox"/> |
| Interviewers | <input checked="" type="checkbox"/> |
| Job Applications | <input checked="" type="checkbox"/> |
| Job postings | <input checked="" type="checkbox"/> |
| Job posting sites | <input checked="" type="checkbox"/> |
| Offers | <input checked="" type="checkbox"/> |
| Phones | <input checked="" type="checkbox"/> |
| Positions | <input checked="" type="checkbox"/> |
| Properties | <input checked="" type="checkbox"/> |
| Reviews | <input checked="" type="checkbox"/> |
| Street Addresses | <input checked="" type="checkbox"/> |
| Waypoints | <input checked="" type="checkbox"/> |

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

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

- Setup Tab:** The user is currently in the "Profiles" tab under the "Users" category.
- Search Bar:** A search bar at the top right contains the text "Search Setup".
- Profile Grid:** A grid of checkboxes for various profile settings. The columns include "Job Applications", "Reviews", "Job postings", "Street Addresses", "Job posting sites", and "Waypoints".
- Session Settings:** Set to "2 hours of inactivity".
- Session Security Level Required at Login:** Set to "-None-".
- Password Policies:** Configuration includes:
 - User passwords expire in: 90 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
- Buttons:** At the bottom are "Save", "Save & New", and "Cancel" buttons.

Creating a user

Screenshot of the Salesforce Setup interface showing the Profiles section.

Left Sidebar:

- Search bar: Q user
- Setup tab
- Home
- Object Manager
- Users (selected)
- Permission Set Groups
- Permission Sets
- Profiles (selected)
- Public Groups
- Queues
- Roles
- User Management Settings
- Users
- Feature Settings
 - Data.com
 - Prospector Users
 - Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
 - User Interface
 - Action Link Templates

Profile Detail:

Event User profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail:

| Name | Event User profile | Custom Profile | |
|--------------|-------------------------------------|----------------|-------------------------------------|
| User License | Salesforce | ✓ | |
| Description | | | |
| Created By | CSE KIRUTHIKAD, 29/10/2023, 7:32 pm | Modified By | CSE KIRUTHIKAD, 29/10/2023, 7:34 pm |

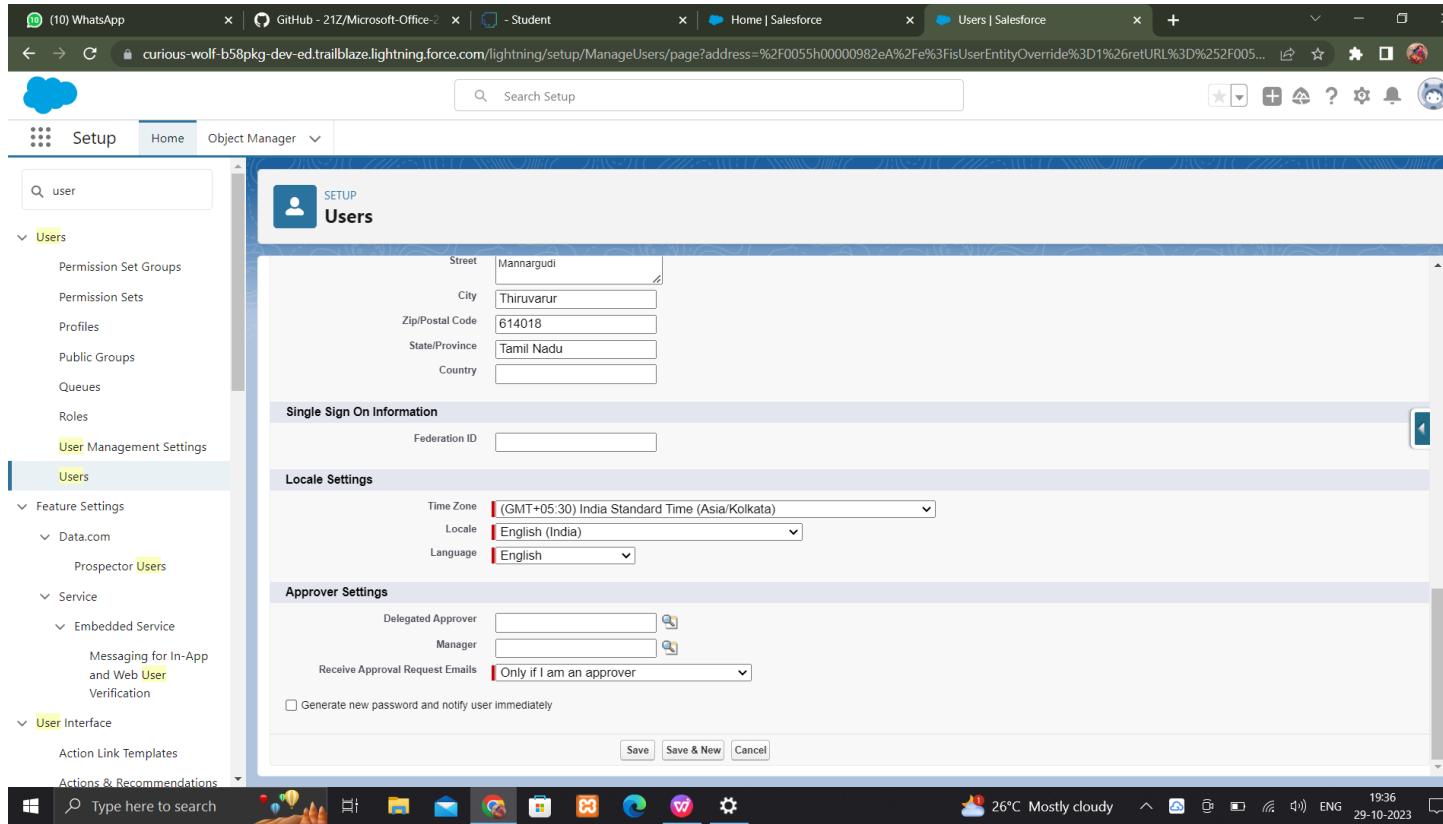
Page Layouts:

| Standard Object Layouts | Global | Individual |
|----------------------------|---|---------------------------------------|
| Email Application | Not Assigned [View Assignment] | Invoice [View Assignment] |
| Home Page Layout | DE Default [View Assignment] | Invoice Line Layout [View Assignment] |
| Access | Access Layout [View Assignment] | Lead Layout [View Assignment] |
| Account | Varies by Record Type [View Assignment] | Legal Entity Layout [View Assignment] |
| Alternative Payment Method | Alternative Payment Method Layout [View Assignment] | Location Layout [View Assignment] |

User Edit:

General Information:

| | | | |
|------------|------------------------|-----------------------------------|-------------------------------------|
| First Name | sanjay | Role | <None Specified> |
| Last Name | gupta | User License | Salesforce |
| Alias | kd | Profile | Event user |
| Email | kiruthikad.sanjay | Active | <input checked="" type="checkbox"/> |
| Username | jnfiageffoa@gmail.com | Marketing User | <input type="checkbox"/> |
| Nickname | User169789984288871512 | Offline User | <input type="checkbox"/> |
| Title | | Knowledge User | <input type="checkbox"/> |
| Company | | Flow User | <input type="checkbox"/> |
| Department | | Service Cloud User | <input type="checkbox"/> |
| Division | | Site.com Contributor User | <input type="checkbox"/> |
| | | Site.com Publisher User | <input type="checkbox"/> |
| | | WDC User | <input type="checkbox"/> |
| | | Data.com User Type | <None> |
| | | Data.com Monthly Addition Limit | 300 |
| | | Accessibility Mode (Classic Only) | <input type="checkbox"/> |
| | | High-Contrast Palette on Charts | <input type="checkbox"/> |



PERMISSION SETS

Create a permission set for two user profiles

Screenshot of the Salesforce Permission Sets page:

Permission Sets

This page allows you to create, view, and manage permission sets.

| Action | Permission Set Label | Description | License |
|-------------|---------------------------------------|--|--|
| Clone | Buyer | Allows access to the store. Lets users see products and categories, ... | B2B Buyer Permission Set One Seat |
| Clone | Buyer Manager | Includes all Buyer capabilities, and allows access to manage carts an... | B2B Buyer Manager Permission Set One Seat |
| Clone | C360 High Scale Flow Integration User | Allows integration user to access features specific to C360 High Scal... | Cloud Integration User |
| Clone | CRM User | Denotes that the user is a Sales Cloud or Service Cloud user. | CRM User |
| Clone | Commerce Admin | Allow access to commerce admin features. | Commerce Admin Permission Set License Seat |
| Clone | FieldServiceMobileStandardPermSet | Give your mobile workforce access to the Field Service mobile app. S... | Field Service Mobile |
| Del Clone | HR Recruiter Supplier Permits | | |
| Clone | Merchandiser | Allow access to commerce merchandising features. | Commerce Merchandiser User Permission Set License Seat |
| Clone | SCR72 Integration User | Give SCR72 Integration User necessary access | Cloud Integration User |
| Clone | Sales Cloud User | Denotes that the user is a Sales Cloud user. | Sales User |
| Clone | Sales Engagement Basic User | Access basic sales automation and email productivity features, includ... | Sales Engagement Basic |
| Clone | Salesforce Apex Guru | Gives Apex Guru access to analyze code for anti patterns. | Cloud Integration User |
| Clone | Salesforce CMS Integration Admin | Gives the admin data access and the permissions to integrate Salesf... | Cloud Integration User |
| Clone | Salesforce Console User | Enable Salesforce Console User | Sales Console User |
| Clone | SeoS Indexing C2C User Perm | Allows the user to access entities indexed by SeoS indexing pipeline. | Cloud Integration User |

Permission Set Overview:

- API Name: HR_Recruiter_Supplier_Permits
- Namespace Prefix:
- Created By: CSE KIRUTHIKA.D 28/10/2023, 10:42 am
- Last Modified By: CSE KIRUTHIKA.D 28/10/2023, 10:47 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

Setup | Home | Object Manager

PER

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Process Automation

Automation Home (Beta)

Flows

Migrate to Flow

Next Best Action

Paused And Failed Flow

Interviews

SETUP

Permission Sets

HR Recruiter Supplier Permits

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary (Beta)

Object Settings

| Object Name | Object API Name | Object Permissions | Total Fields | Tab Settings |
|-------------------------------|--------------------------|--------------------|--------------|--------------|
| Accounts | Account | No Access | 47 | -- |
| AI Insight Reasons | AIInsightReason | No Access | -- | -- |
| AI Record Insights | AIRecordInsight | No Access | -- | -- |
| Alternative Payment Methods | AlternativePaymentMethod | No Access | 27 | -- |
| API Anomaly Event Stores | ApiAnomalyEventStore | No Access | 14 | -- |
| App Analytics Query Requests | AppAnalyticsQueryRequest | No Access | -- | -- |
| Application Usage Assignments | AppUsageAssignment | No Access | -- | -- |
| Asset Actions | AssetAction | No Access | 30 | -- |
| Asset Action Sources | AssetActionSource | No Access | 18 | -- |
| Asset Relationships | AssetRelationship | -- | 10 | -- |
| Assets | Asset | No Access | 42 | -- |
| Asset State Periods | AssetStatePeriod | No Access | 11 | -- |
| Associated Locations | AssociatedLocation | -- | 10 | -- |
| Async Operation Logs | AsyncOperationLog | No Access | -- | -- |
| Authorization Form Consents | AuthorizationFormConsent | No Access | 14 | -- |
| Authorization Form Data Uses | AuthorizationFormDataUse | No Access | 8 | -- |
| Authorization Forms | AuthorizationForm | No Access | 11 | -- |

Video Tutorial | Help for this Page

Setup | Home | Object Manager

PER

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Process Automation

Automation Home (Beta)

Flows

Migrate to Flow

Next Best Action

Paused And Failed Flow

Interviews

... > SETUP > PERMISSION SET 'HR RECRUITER SUPPLIER PERMITS'

HR Recruiter Supplier Permits

Current Assignments

Add Assignment

No assignments defined.

Cloudy 25°C ENG 29-10-2023

Screenshot of the Salesforce Permission Set Assignment screen.

The sidebar navigation includes:

- Hyperforce Assistant
- Lightning Experience Transition Assistant
- Users
 - Permission Set Groups
 - Permission Sets
- Feature Settings
 - Digital Experiences
 - Settings
 - Functions
 - Sales
 - Accounts
 - Person Accounts
- Process Automation
 - Automation Home (Beta)
 - Flows
 - Migrate to Flow
 - Next Best Action
 - Paused And Failed Flow Interviews

The main content shows a list of users selected for assignment:

| Full Name | Alias | Username | Role | Active | Profile |
|-------------------|----------|--|----------------------------------|--------|---------|
| Abhilash Garapati | Garapati | eutfkfjtryfg@gmail.com | Standard Platform User | ✓ | |
| Chatter Expert | Chatter | chatty.00d5h000008oa5meag.9le1ogsxpkp@chatter.salesforce.com | Chatter Free User | ✓ | |
| CSE KIRUTHIKA D | CKIRU | kiruthikaduraiyarasan14@curious-wolf-b58pkg.com | System Administrator | ✓ | |
| Integration User | integ | integration@00d5h000008oa5meag.com | Analytics Cloud Integration User | ✓ | |
| keerthi d | kd | gitfghuiygkj@gmail.com | Standard Platform User | ✓ | |
| sanjay gupta | kd | ljhfageffoah@gmail.com | Event user | ✓ | |
| Security User | sec | insightssecurity@00d5h000008oa5meag.com | Analytics Cloud Security User | ✓ | |
| selva s | ss | fgjgihjl@gmail.com | Standard Platform User | ✓ | |

Buttons at the bottom: Cancel, Next

Screenshot of the Salesforce Permission Set Assignment screen, showing configuration options for the selected users.

The sidebar navigation is identical to the previous screenshot.

Configuration options for the expiration date:

- No expiration date (selected)
- Specify the expiration date
 - 1 Day
 - 1 Week
 - 30 Days
 - 60 Days
 - Custom Date

Time Zone selection: Select a time zone...

The Selected Users table shows the same list of users as the previous screenshot, with additional columns for User License and Expires On.

| Full Name | Role | Profile | Active | User License | Expires On |
|-------------------|------------------------|---------|--------|---------------------|---------------|
| sanjay gupta | Event user | | ✓ | Salesforce | Never Expires |
| Abhilash Garapati | Standard Platform User | | ✓ | Salesforce Platform | Never Expires |

Buttons at the bottom: Back, Assign

10 WhatsApp | GitHub - 21Z/Microsoft-Office-2 | - Student | Home | Salesforce | Permission Sets | Salesforce

curious-wolf-b58pkg-dev-ed.trailblaze.lightning.force.com/one/one.app#eyJhb21wb25lbnREZWYIOjzZXr1cF9wbGF0Zm9ybV9wZXUtzpwc2F5ZXN1bHRQYWdliwiYXR0cmliidXRlc/6e30sInN0Y...       

Setup | Home | Object Manager | Search Setup |   

PER

Hyperforce Assistant

Lightning Experience Transition Assistant

Users

- Permission Set Groups
- Permission Sets

Feature Settings

- Digital Experiences
- Settings
- Functions

Sales

- Accounts
- Person Accounts

Process Automation

- Automation Home (Beta)
- Flows
- Migrate to Flow
- Next Best Action
- Paused And Failed Flow

Assignment Summary

| Full Name | User License | Expires On | Time Zone | Status |
|-------------------|---------------------|------------|-----------|---|
| sanjay gupta | Salesforce | | |  Success |
| Abhilash Garapati | Salesforce Platform | | |  Success |

Type here to search        

Done

25°C Cloudy  ENG 29-10-2023

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main area displays the 'HR Recruiter Supplier Permits' permission set assignments. The table has the following columns: Full Name, Active, Role, Profile, User License, and Expires On. Two users are listed: Abhilash Garapati and sanjay gupta, both assigned to the Standard Platform User profile and Salesforce Platform license.

| Full Name | Active | Role | Profile | User License | Expires On |
|-------------------|--------|------|------------------------|---------------------|------------|
| Abhilash Garapati | ✓ | | Standard Platform User | Salesforce Platform | |
| sanjay gupta | ✓ | | Event user | Salesforce | |

USER ADOPTION

Create a record adoption

Salesforce Home Page

The screenshot shows the Salesforce App Launcher. The sidebar on the left lists various categories: Hyperforce, Lightning Experience Assistant, Users, Permissions, Features, Digital Experiences, Functions, Sales, Automation, Process Flow, and Flows. The main area displays several app cards:

- SI: Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and... (Icon: Blue square with white 'SI')
- Chatter: The Salesforce Chatter social network, including profiles and feeds (Icon: Blue square with white 'C')
- Salesforce CRM Content (Icon: Blue square with white 'C')
- Sales: Manage your sales process with accounts, leads, opportunities, and more (Icon: Blue square with white 'S')
- Sales Console (Lightning Experience) Lets sales reps work with multiple records on one screen (Icon: Blue square with white 'S' inside a speech bubble)
- Service Console (Lightning Experience) Lets support agents work with multiple records across customer service... (Icon: Purple square with white 'S' inside a speech bubble)
- Lightning Usage App: View Adoption and Usage Metrics for Lightning Experience (Icon: Blue square with white 'L')
- Digital Experiences: Manage content and media for all of your sites. (Icon: Blue square with white 'D')
- Commerce: Manage your store's products, catalogs, and pricebooks. (Icon: Green shopping cart)
- Playground Starter: Get started with your Trailhead Playground. (Icon: Blue square with white 'P')
- Bolt Solutions: Discover and manage business solutions designed for your industry. (Icon: Blue lightning bolt)
- Recruiting: Custom app for the HR department (Icon: Blue square with white 'R')
- Trailblazer (Icon: Blue square with white 'T')

Search bar: Search apps or items...

Visit AppExchange

Salesforce Recruiting Page

The screenshot shows the Salesforce Recruiting page. The top navigation bar includes links for Home, Candidates, Job Applications, Interviewers, Positions, Reports, Dashboards, Chatter, and Job posting sites.

The main content area displays a list of recently viewed positions:

- Recently Viewed (dropdown menu)
- 0 items • Updated a few seconds ago
- Search bar: Search this list...
- Buttons: New, Import, Change Owner

You haven't viewed any Positions recently.
Try switching list views.

Page URL: https://curious-wolf-b58pkg-dev-ed.trailblaze.lightning.force.com/lightning/o/Position_c/list?filterName=Recent

Screenshot of the "New Position" creation page in Salesforce Lightning.

Information Section:

- Title:** job posting site
- Status:** New
- Department:** --None--
- Approval Status:** Approved
- Location:** --None--
- Owner:** CSE KIRUTHIKA D
- Hiring Manager:** Search People...

Description Section:

- Job Description:** (Empty text area)

Salary Section:

- Salary Range:** (Empty text area)

Action Buttons:

- Cancel
- Save & New
- Save

Screenshot of the "job posting site" record details page in Salesforce Lightning.

Details Tab:

- Information:**
 - Title: job posting site
 - Status: New
 - Department: --None--
 - Location: --None--
 - Owner: CSE KIRUTHIKA D
 - Hiring Manager: (Empty)
- Description:**
 - Job Description: (Empty text area)
- Salary:**
 - Salary Range: (Empty text area)
 - Pay Grade: (Empty text area)
- Experience & Education:** (Empty)

Activity & Chatter:

- Activity:** Open Activities [2] (List of activities)

| ID | Name | Type | Created Date | Last Activity |
|-------|-----------------|------|----------------------|---------------|
| A-001 | Open Activity 1 | Task | 2023-10-29T10:00:00Z | Created |
| A-002 | Open Activity 2 | Task | 2023-10-29T10:00:00Z | Created |
- Chatter:** New Settings for Record Pages
- Personalize your Activities view:** You can choose to keep track of current and past tasks and events in the Open Activities and Activity History related lists or the Activity timeline.

Action Buttons:

- + Follow
- New Contact
- Edit
- New Opportunity

A screenshot of a web browser window showing a list of recently viewed items under the "Recently Viewed" section. The browser has multiple tabs open, including WhatsApp, GitHub, Microsoft Office, Student, Home | Salesforce, and Recently Viewed | Positions | Sales. The main content area displays a table with one item selected, titled "job posting site". The interface includes a search bar, filter options (Title), and a toolbar with buttons for New, Import, Change Owner, Edit, Delete, and Change Owner.

A screenshot of a web browser window showing a confirmation dialog box titled "Delete Position". The dialog asks, "Are you sure you want to delete this Position?". It contains two buttons: "Cancel" and "Delete". The background shows the same recently viewed list as the previous screenshot, with the "job posting site" item still selected.

10 (10) WhatsApp GitHub - 21Z/Microsoft-Office-2 - Student Home | Salesforce Recently Viewed | Positions | Sal +

curious-wolf-b58pkg-dev-ed.trailblaze.lightning.force.com/lightning/o/Position_c/list?filterName=Recent

A.W. Computing

Recruiting Home Candidates Job Applications Interviewers Positions Reports Dashboards Chatter Job posting sites

Positions Recently Viewed

Position "job posting site" was deleted. Undo X

0 items • Updated a few seconds ago

New Import Change Owner

Search this list...

Title

You haven't viewed any Positions recently.
Try switching list views.

Type here to search

Windows Start button

25°C Cloudy ENG 29-10-2023

Positions

Recently Viewed

0 items • Updated a few seconds ago

Title

You haven't viewed any Positions recently.
Try switching list views.

New Import Change Owner

Search this list...

Recruiting Home Candidates Job Applications Interviewers Positions Reports Dashboards Chatter Job posting sites

Creating a reports

Recent

| REPORTS | Report Name | Description | Folder | Created By | Created On | Subscribed |
|-----------------|----------------------------------|---|-------------------|-----------------|----------------------|------------|
| Recent | Job application with position | Which flows run, what's the status of each interview, and how long do users take to complete the screens? | Private Reports | CSE KIRUTHIKA D | 28/10/2023, 11:22 am | |
| Created by Me | Sample Flow Report: Screen Flows | Public Reports | Automated Process | | 3/10/2023, 10:29 am | |
| Private Reports | | | | | | |
| Public Reports | | | | | | |
| All Reports | | | | | | |
| FOLDERS | | | | | | |
| All Folders | | | | | | |
| Created by Me | | | | | | |
| Shared with Me | | | | | | |
| FAVORITES | | | | | | |
| All Favorites | | | | | | |

Create Report

Category

- Recently Used
- All
 - Accounts & Contacts
 - Opportunities
 - Customer Support Reports
 - Leads
 - Campaigns
 - Activities
 - Contracts and Orders
 - Price Books, Products and Assets
 - Administrative Reports

Select a Report Type

| 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 |

Screenshot of a Salesforce Report Builder interface showing two reports for "Job Applications with Position".

The top report shows filters for "Job Application Name", "Location Number", "Job Application Owner Name", "Job Application Owner Role", and "Job Application Created By". A note says "No records returned. Try editing report filters." The sidebar lists various fields under "Job Application" and "Position".

The bottom report shows similar filters and a note about no records returned. The sidebar lists various fields under "Position".

Both reports have standard Salesforce navigation and reporting controls at the top and bottom.

Screenshot of a web browser showing multiple tabs open, including WhatsApp, GitHub, a Microsoft Office document, a Salesforce Home page, Report Builder | Salesforce, and ChatGPT. The main content area displays a report titled "Job applications with positions" from the "Recruiting" section of the Salesforce interface.

The report summary shows:

- Total Records: 0
- Unique Legacy Job Application Nu...: 0

A decorative blue illustration of a cactus, clouds, and mountains is centered above the results.

No Results

No records returned. Try editing report filters.

Report settings at the bottom include: Row Counts, Detail Rows, Subtotals, and Grand Total.

System status bar at the bottom right shows: 24°C Cloudy, ENG, 29-10-2023.

Screenshot of a Salesforce Report Builder interface showing a report titled "New Job posting sites Report".

The report configuration includes:

- Fields:** Groups (Job posting site URL, Job posting site: site Name) and Columns (Job posting site URL, Job posting site: site Name).
- Filters:** A note indicating "Previewing a limited number of records. Run the report to see everything." with a status icon.
- Report Options:** Buttons for "Add Chart", "Save & Run", "Save", "Close", and "Run". A checkbox for "Update Preview Automatically" is checked.

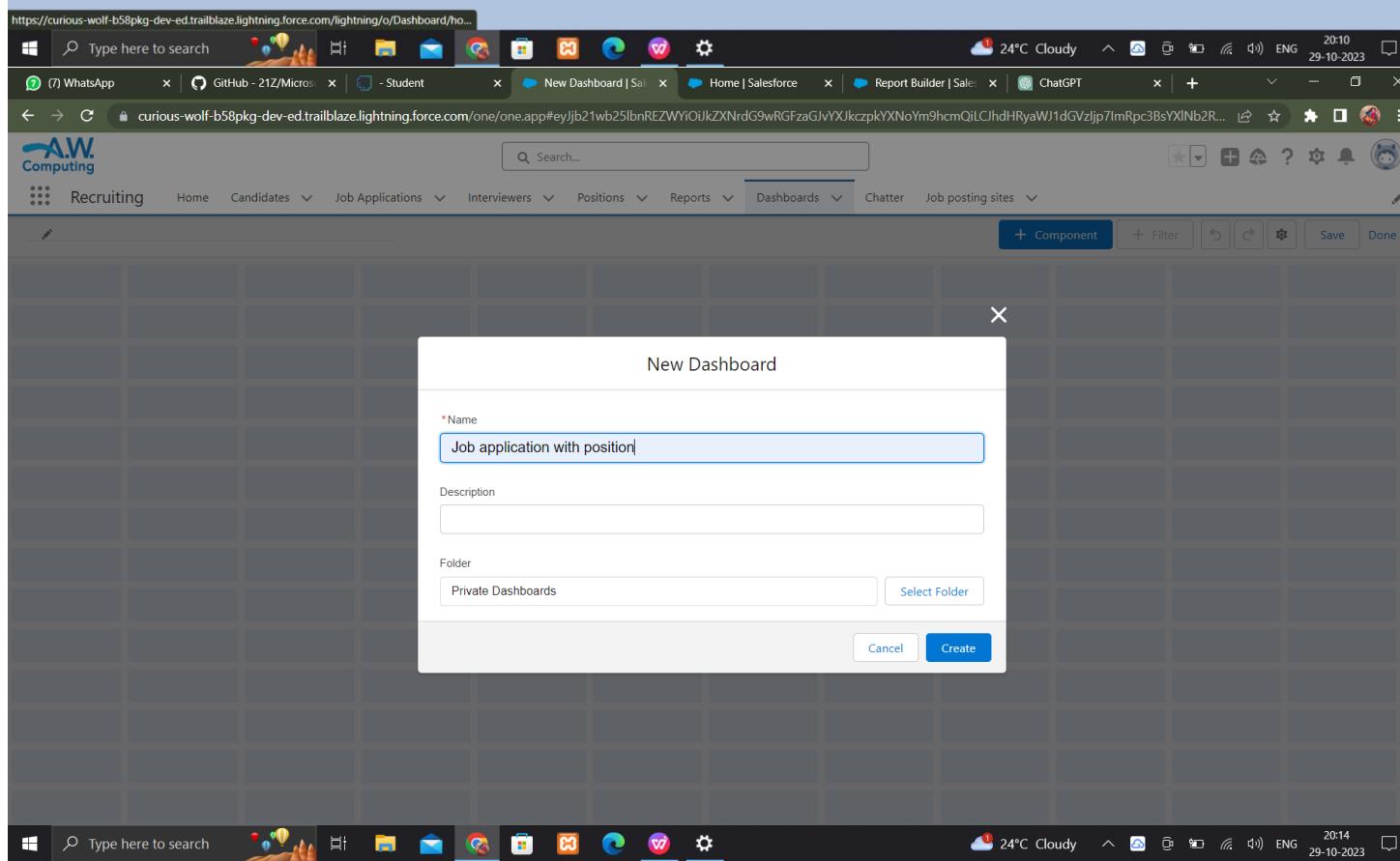
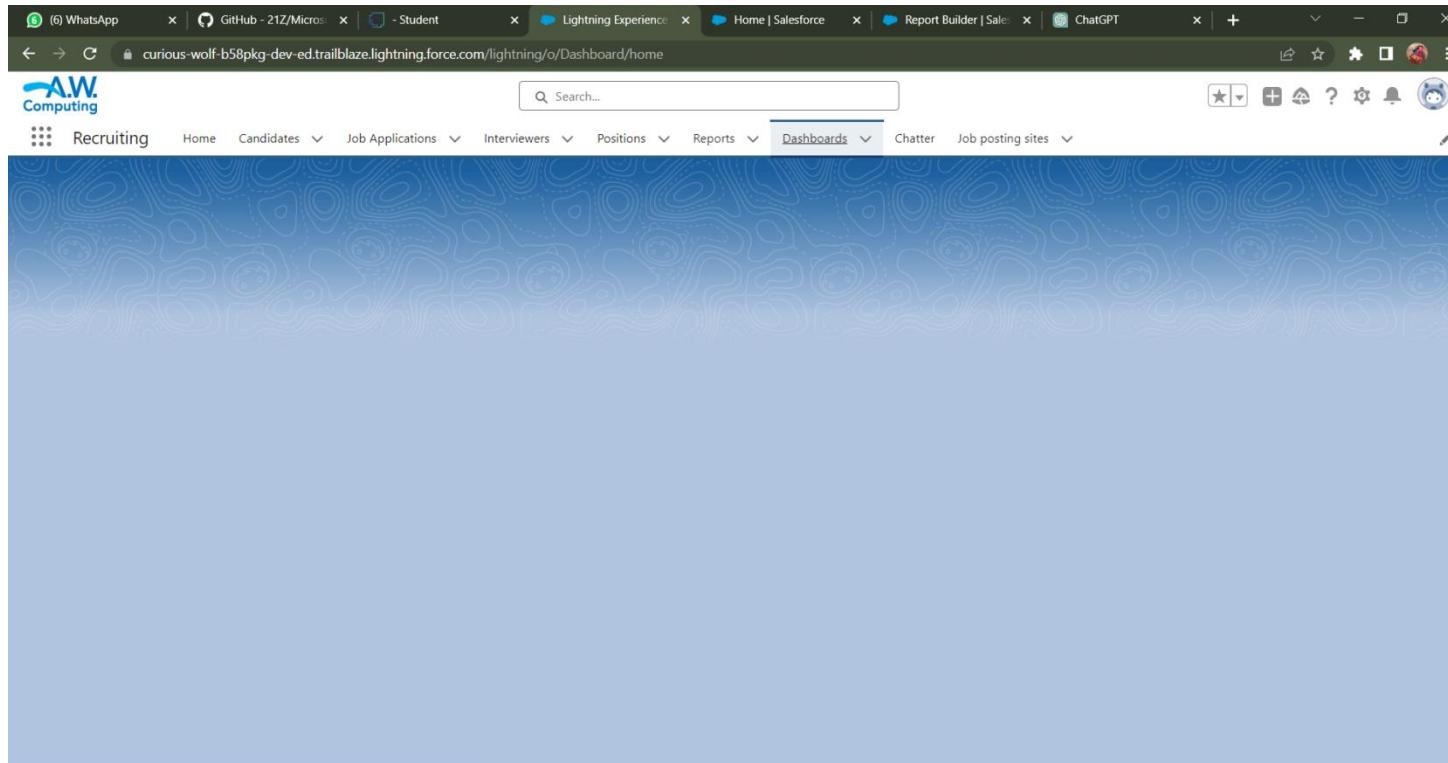
The report results section displays:

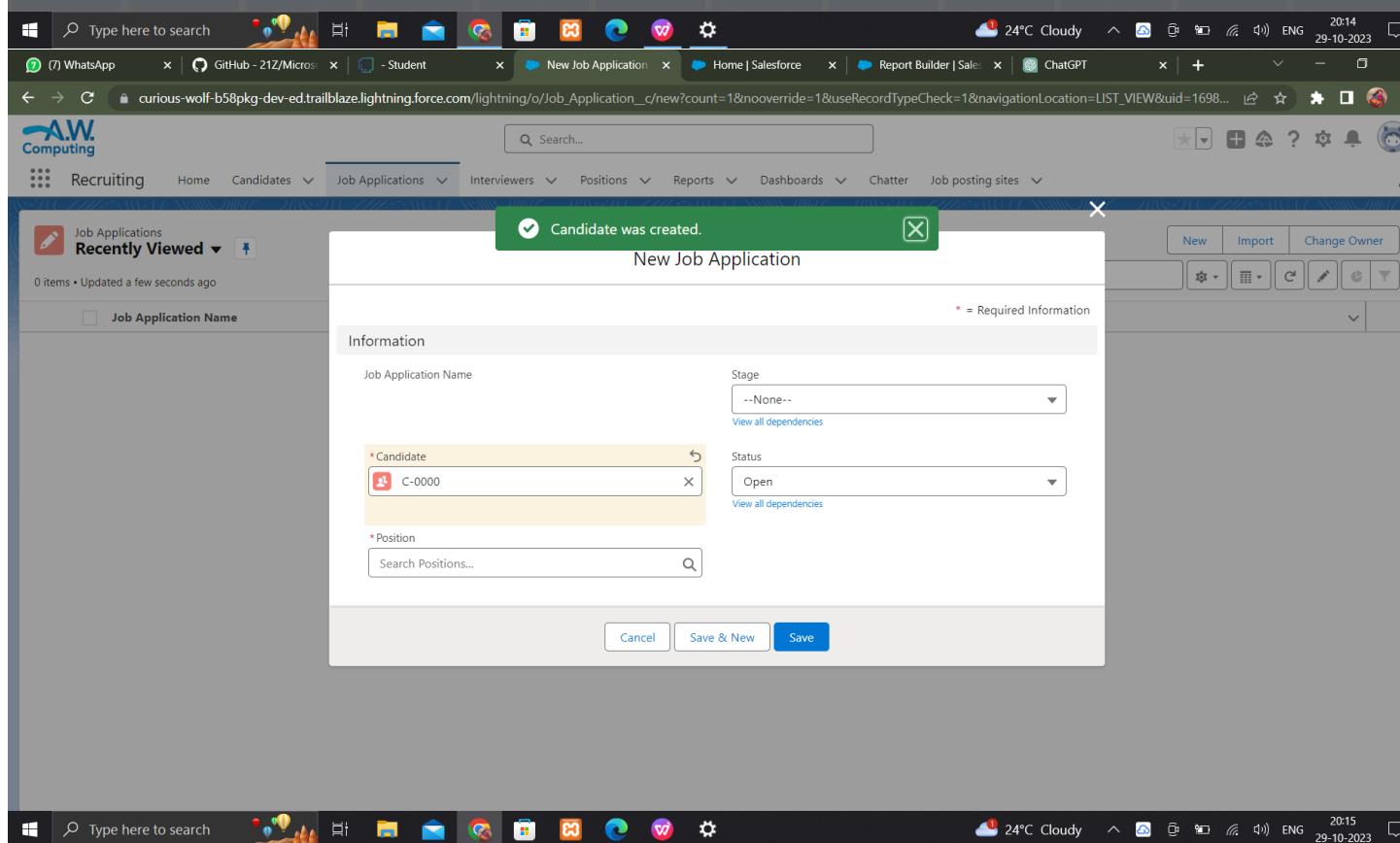
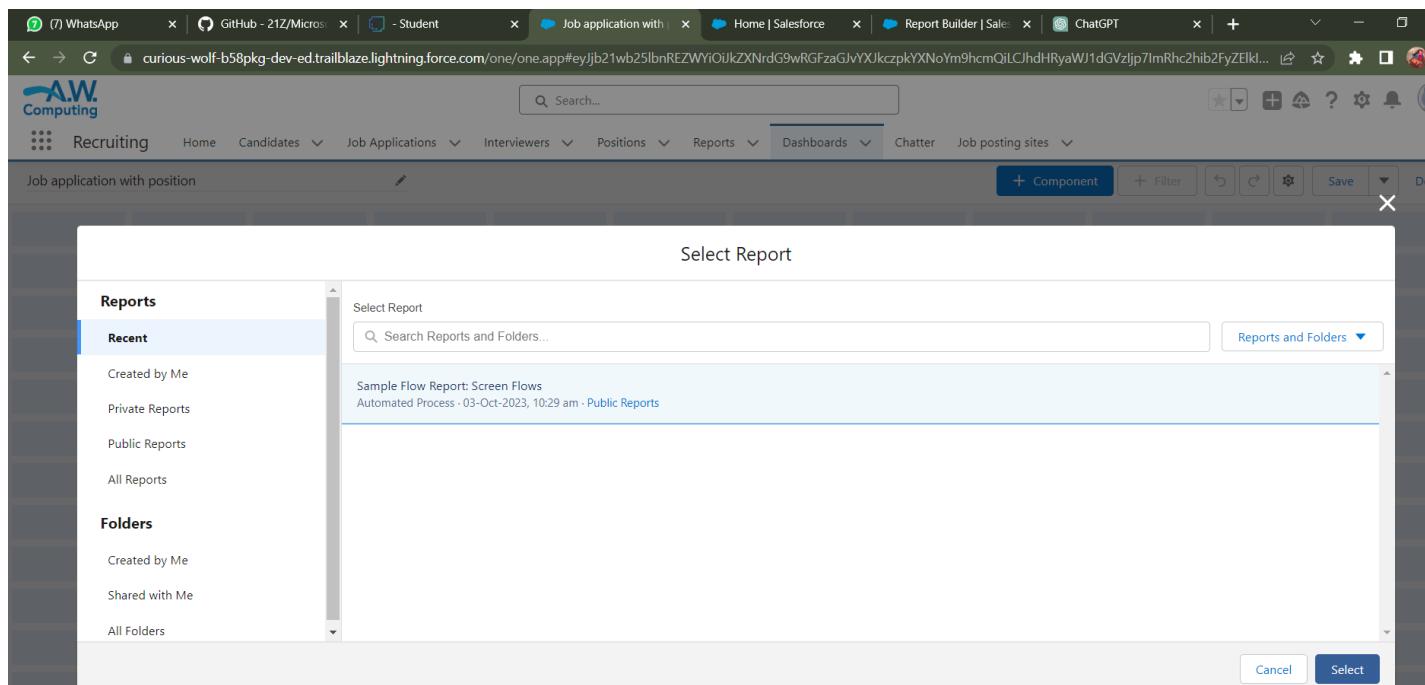
- A message: "Your report returned no records."
- A "Details (0 Rows)" section with a note: "Click an intersection in the table above to filter details."
- Report summary buttons: Row Counts, Detail Rows, Subtotals, Grand Total, Stacked Summaries.

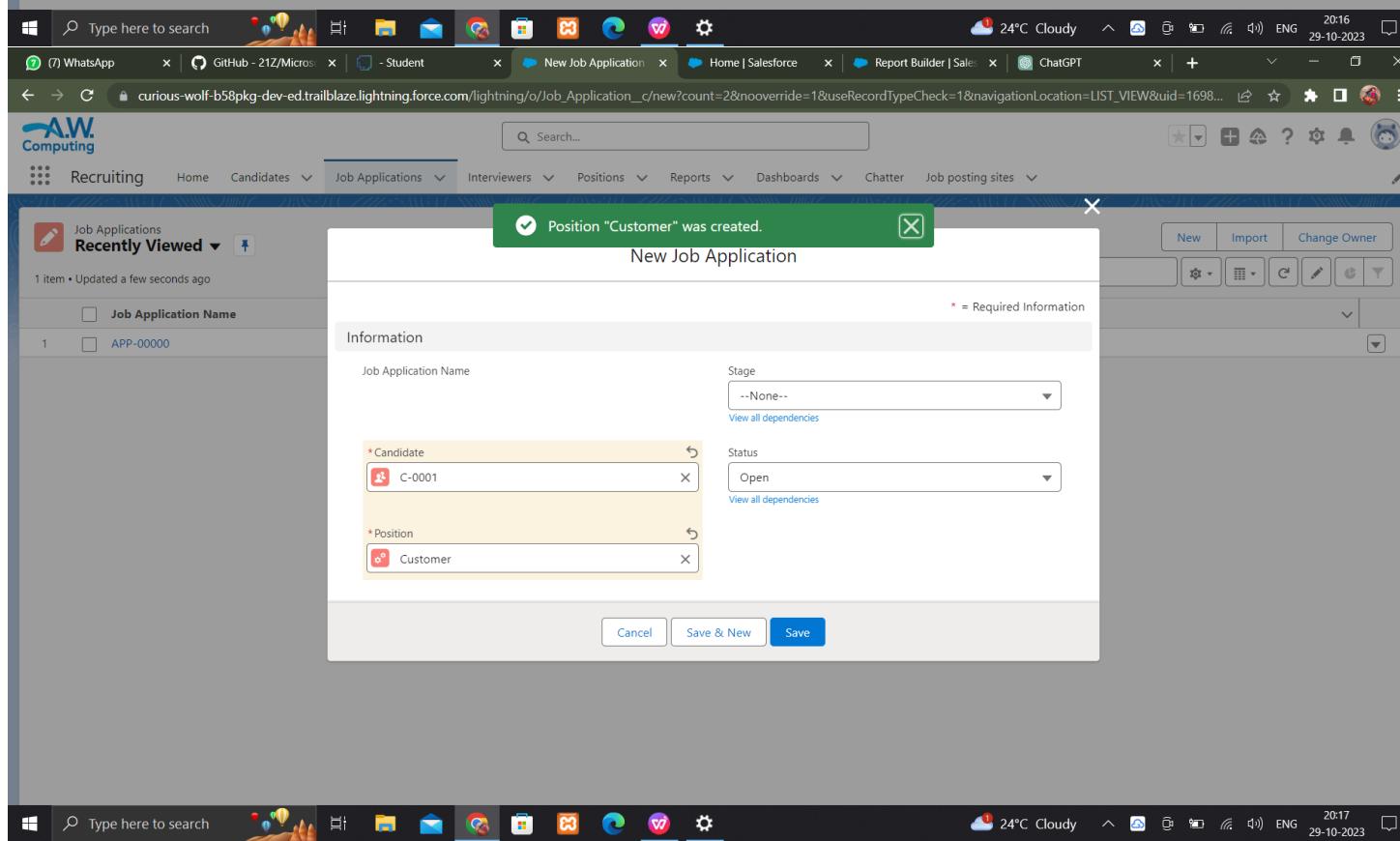
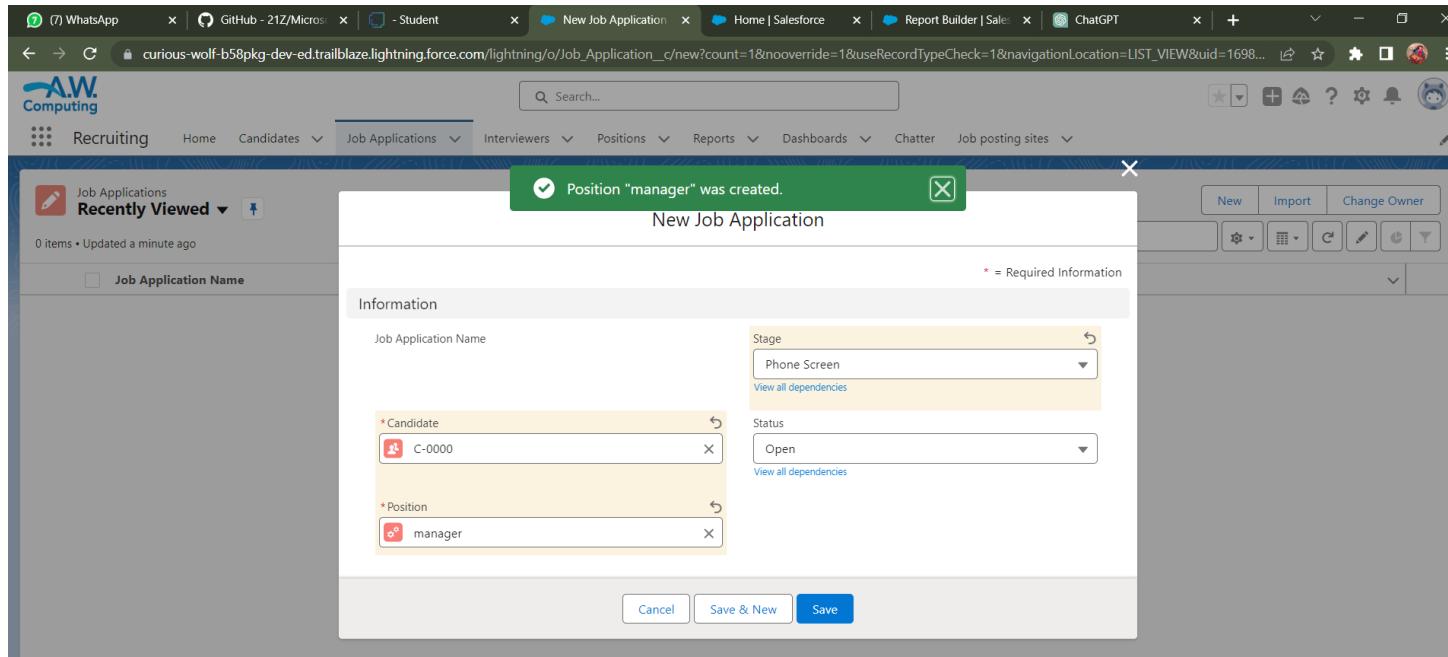
The browser taskbar at the bottom shows multiple open tabs including WhatsApp, GitHub, Student, Home | Salesforce, Report Builder | Salesforce, ChatGPT, and the current report page.

The screenshot shows a web browser window with several tabs open at the top, including WhatsApp, GitHub, Student, Home | Salesforce, Report Builder | Salesforce, and ChatGPT. The main content area displays a Salesforce Report Builder interface for a 'Job posting sites' report. The report is currently in 'Preview' mode, showing a single record with the URL 'Job posting site URL' and a value of 'Total'. The interface includes sections for 'Fields' (Groups and Columns), 'Filters' (with a note about previewing a limited number of records), and various reporting options like Row Counts, Detail Rows, Subtotals, Grand Total, and Stacked Summaries. A message at the bottom indicates 'Your report returned no records.' The browser's taskbar at the bottom shows icons for search, file operations, and system status.

Create a dash board







The screenshot shows a web browser window with multiple tabs open. The active tab is a job application page from a custom application interface. The URL in the address bar is curious-wolf-b58pkg-dev-ed.trailblaze.lightning.force.com/lightning/r/job_Application_c/a025h00000pAKGJAA4/view. The page header includes the logo of 'A.W. Computing' and navigation links for Recruiting, Home, Candidates, Job Applications, Interviewers, Positions, Reports, Dashboards, Chatter, and Job posting sites. A search bar is also present.

A prominent message at the top right of the page states "Job Application 'APP-00001' was created." Below this, there are two sections: "Information" and "System Information".

Information:

- Job Application Name: APP-00001
- Candidate: C-0001
- Position: Customer
- Stage: (empty field)
- Status: Open

System Information:

- Created By: CSE KIRUTHIKA D, 29/10/2023, 8:17 pm
- Last Modified By: CSE KIRUTHIKA D, 29/10/2023, 8:17 pm

The browser's taskbar at the bottom shows various pinned icons and the system tray on the right displays weather information (24°C Cloudy), network status, battery level, and the date and time (29-10-2023).

CREATE A BATCH APEX

Developer Console - Google Chrome
curious-wolf-b58pkg-dev-ed.trailblaze.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

Util.apxc

Code Coverage: None API Version: 59

```
1 public class Util {  
2 }  
  
Logs Tests Checkpoints Query Editor View State Progress Problems
```

User Application Operation Time Status Read Size

Filter Click here to filter the log list

Developer Console - Google Chrome
curious-wolf-b58pkg-dev-ed.trailblaze.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

Util.apxc

Code Coverage: None API Version: 59

```
2  
3 public Database.QueryLocator start(Database.BatchableContext bc) {  
4  
5     string myList = 'SELECT Id, Name, Technical_Site_c FROM Job_Posting_Site_c';  
6  
7     return Database.getQueryLocator(myList); system.debug('start method');  
8 }  
9  
10 public void execute(Database.BatchableContext bc) {  
11     Util1 obj = new Util1(); Database.executeBatch(obj);  
12     system.debug(acclist.size()); system.debug(acclist);  
13 }  
14  
15 public void finish(Database.BatchableContext bc) {  
16     system.debug('finish method');  
17 }  
18 }  
19 }  
20 }
```

Enter Apex Code

```
1 Util1 obj = new Util1(); Database.executeBatch(obj);  
system.debug(acclist.size()); system.debug(acclist);
```

Logs Tests Checkpoints Query Editor View State Progress

| Name | Line | Problem |
|------|------|-------------|
| Util | 7 | Unreachable |

Open Log Execute Execute Highlighted

Type here to search 24°C Cloudy 2026 29-10-2023

Watchlist ideas ENG 29-10-2023

Check the batch

Screenshot of the Salesforce Setup Home page. The search bar at the top shows "apex jo". The main content area features three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". The "Real-time Collaborative Docs" card includes a "Get Started" button. On the left sidebar, under "Setup Home", there are links for Service Setup Assistant, Commerce Setup Center, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Platform Tools.

Screenshot of the Salesforce Apex Jobs page. The search bar at the top shows "apex jo" and "apex jo" in the "Setup" dropdown. The main content area displays a table titled "Most Recently Used" with 10 items. The table has columns for NAME, TYPE, and OBJECT. The first item is "HR Recruiter Supplier Permits" (Permission Set). The second item is "sanjay gupta" (User). Below the table, a banner says "It's Better in Lightning" and "Move to Lightning Experience and give your users a productivity boost." The sidebar on the left includes links for Lightning Experience Transition Assistant, Salesforce Mobile Quick Start, Home, and Administer (Release Updates, Manage Users, Manage Apps, Manage Territories, Company Profile, Data Classification).

CONCLUSION

In conclusion, the "Recruiting Assistance for HR Managers Salesforce Project" presents a comprehensive approach to solving the recruitment challenges faced by HR managers in the context of the Salesforce project. By understanding the problem, proposing effective solutions, and delineating both functional and technical requirements, this project aims to streamline the recruitment process and ensure that the right talent is acquired and integrated into the project successfully.

The project acknowledges the critical importance of hiring skilled personnel who possess the specific expertise required for Salesforce administration, development, consulting, and project management. Through the refinement of job descriptions, the utilization of specialized recruitment channels, and a structured interview process, this project will enable HR managers to identify and select candidates who align with the Salesforce project's goals.

Furthermore, the technical requirements outlined ensure that the recruitment system is robust, secure, and capable of managing candidate data efficiently. The integration with HR and project management systems, as well as a focus on data security and compliance, underscores the project's commitment to delivering a reliable and compliant recruitment solution.

Ultimately, the success of the "Recruiting Assistance for HR Managers Salesforce Project" will not only facilitate the efficient execution of the

Salesforce project but also contribute to its overall success by ensuring that the right talent is in place to drive the project forward. The combination of effective recruitment processes and a well-implemented technical infrastructure will help HR managers and project stakeholders achieve their objectives while adhering to industry best practices and compliance standards.

CHAPTER-7

PROJECT DEMONSTRATION

GitHub:

https://github.com/Pavan3115/Pavan_8D1C9E3C5C5D305959147B9414559921/tree/main

Demo Link:

<https://drive.google.com/file/d/1nSILCMLu9qQnyvFWPhsWFISPzex2PZQS/view?usp=drivesdk>