

# Project Title: Recruiting Management App (Admin/Developer)

## INDEX:

- Create Your Salesforce Developer Org to Get Started
- Custom Object Creation
- Validation Rules Creation
- Process Automation
- Triggers

## Category:


Salesforce CRM

## Project Description:







A Recruiting Application Management is cloud based App hosted in Salesforce and Design to streamline the Recruitment process for organization using declarative and custom development many more. In the project, we will be creating objects to store these records and will also create various fields to store the values of these records. We will establish relationships between various objects.

## Detailed Description: Account Creation from developer.salesforce.com

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar contains a navigation menu with categories like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', 'Prospector Users', 'User Interface', 'Action Link Templates', 'Actions & Recommendations', and 'App Menu'. The main content area displays the 'Users' section for the user 'rupali choudhary'. The user's profile is shown with a header bar containing the name and a 'Users' tab. Below the header, there are links to various user-related settings. The 'User Detail' section provides a comprehensive overview of the user's information, including personal details, contact information, and system settings. The user's role is 'System Administrator', and they are currently active. The page also includes a 'Manage User' button and a 'Change Password' link.



Search Setup



SetupHomeObject Manager

Quick Find

Setup Home

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Apps


> Feature Settings

> Einstein

> Objects and Fields

> Events


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4 items

NAME	TYPE	OBJECT
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## Implementation

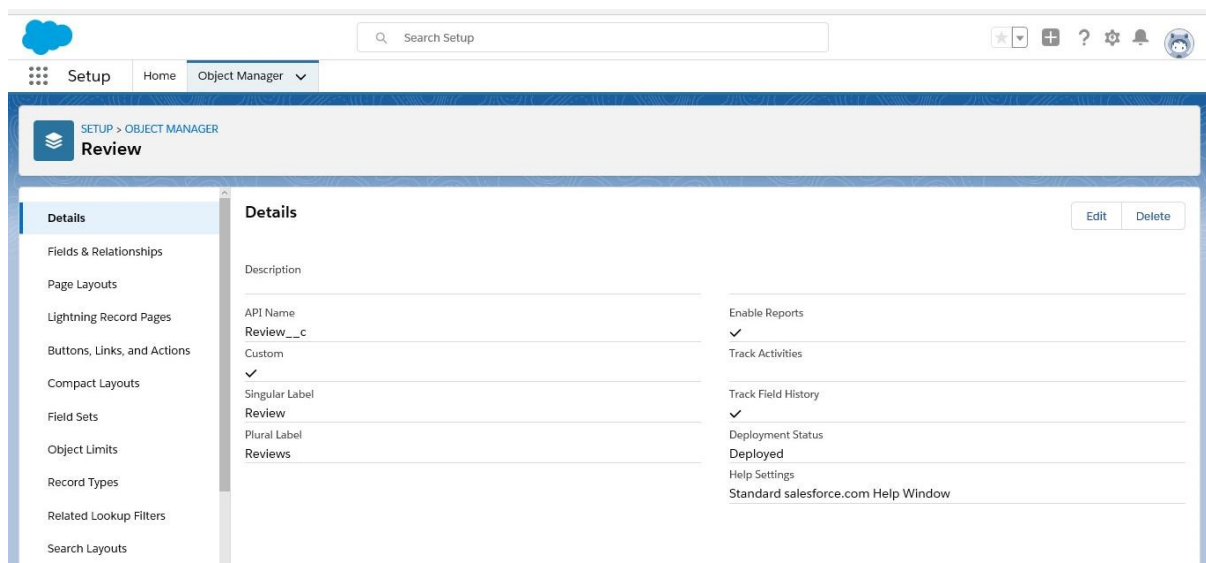
### Building a data model for the recruiting application

In this step of implementation, we customize an app using clicks and not using code to give the recruiters an easy access to the key data. Before following any of the steps we need to install the package Recruiting app package whose publisher is AW Computing. After installation of the package we follow the further steps:

#### Creating a custom object for reviews

We start by creating a custom object named review.

- ✓ Launch the salesforce profile and select setup and from there click on object manager tab.
- ✓ Now click on create and select custom object to create Review named custom object.
- ✓ The next step is to fill in details like label, plural label, data type, display format, starting number.
- ✓ In the optional features section select allow reports and field history and in the search status section select allow search.
- ✓ Now finally save the object.

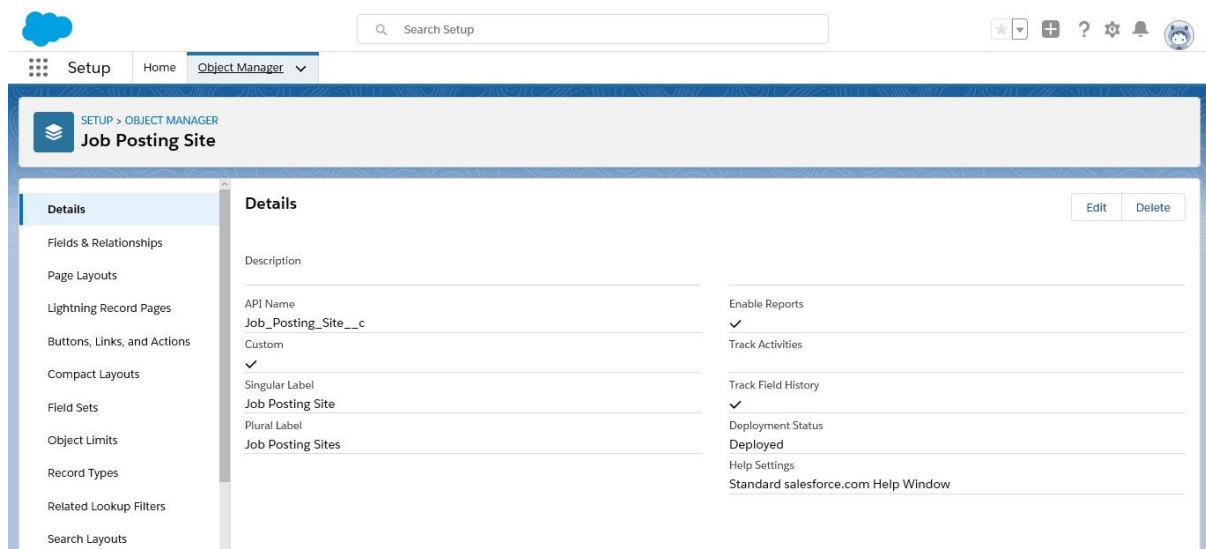


**Fig :** Custom object Review

## Create job posting site object

Next to keep the track of which websites host AW Computing open positions we create an object named job posting site

- ✓ Launch the salesforce profile and select setup and from there click on object manager tab.
- ✓ Now click on create and select custom object to create Job Posting Site named custom object.
- ✓ The next step is to fill in details like label, plural label, data type
- ✓ In the optional features section select allow reports and field history and in the search status section select allow search.
- ✓ Select launch new tab after saving the object option in the object creation section.
- ✓ Click save and now a new tab appears where we select the tab style as real estate sign and click next and then save the object.



**Fig :Job Posting Site object**

- ✓ Now we create four fields for our object namely Job posting site URL, status, technical site, description of data type URL, picklist having values active & inactive, checkbox, text area respectively by clicking on field and relationships.

**Fig : Job Posting site object with fields**

- **Creating a junction object for job postings**

A junction object is the one having two master detail relationships and displays many to many relationships.

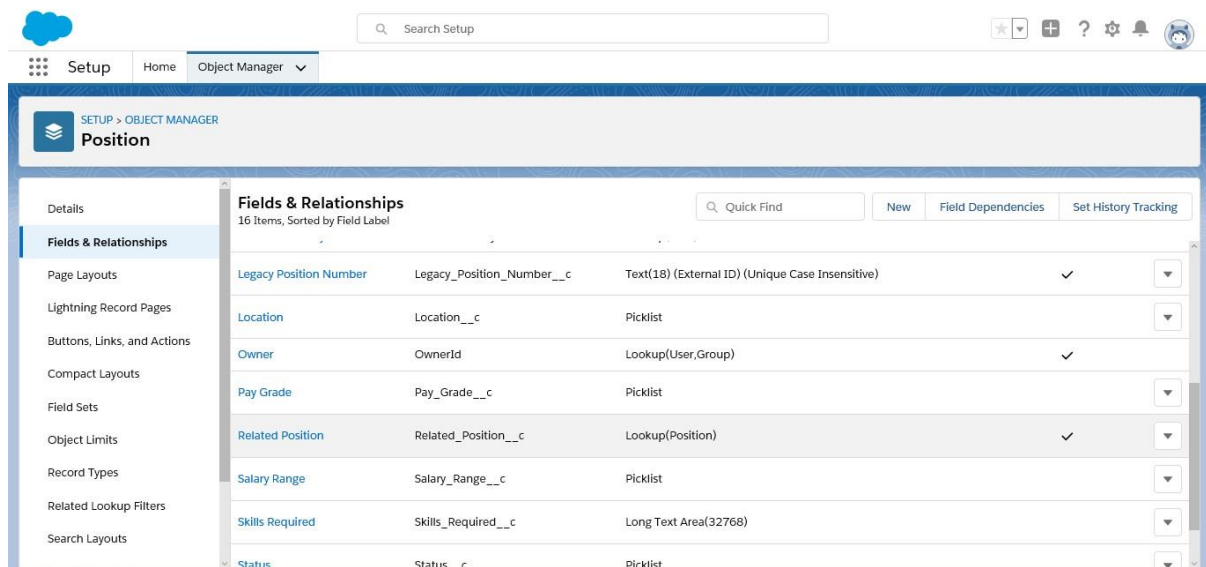
- ✓ Create object named job postings using the same procedure as for review object.
- ✓ Now we create two master detail relationships for this object. First is related to Position object which is already created in the recruiting package and the second is related to job posting site object created above.
- ✓ Next, we modify their page layouts by customizing the related lists.

- **Creating self-relationship with the position object**

When HR team members look at a position in their recruiting app, they want each recruiter to be able to identify other open positions requiring similar skills or having similar job descriptions. This can be set up by creating a lookup relationship for her

- ✓ From Setup->Object Manager select positions object and click on field and relationship to create new lookup relationship.
- ✓ Click on create and select lookup relationship and relate it to position object itself and give the field and label names and save it.

- ✓ Now we can add lookup filters to help the team work in more efficient manner and narrow down their searches.
- ✓ Select related position and select edit.
- ✓ A page opens where at the bottom click on show filter settings and now, we can add filters like if position record id not equal to related position's record id then display the appropriate message other display the error message.



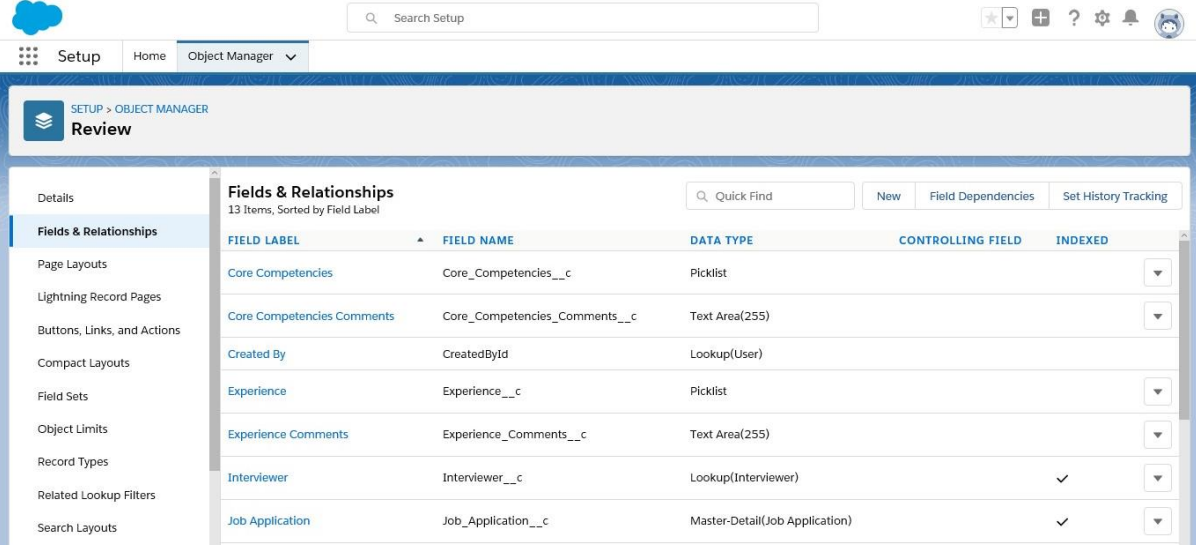
**Fig : Lookup relationship of position object**

- **Creating custom recruiting fields**

In this phase, you can help HR recruiters track the interview process by inserting custom fields to collect details about the outcome of an interview. In the areas of core competencies and leadership skills, it is needed that interviewees should assess and comment on each candidate and provide input on how they are recommending a hire candidate. To do this, set the Analysis object to some custom fields.

- ✓ Now we create three custom picklists on review object namely core competencies, leadership skills, experience so that the interviewer can rate the candidates from 1 to 5.

- ✓ Then we create 3 text area fields namely core competency comments, leader ship skill comments and experience comments so that the interviewer can add his comments.
- ✓ We also create a checkbox field namely recommend for hire so that the interviewer can check the box if he recommends the candidate otherwise let it remain unchecked.
- ✓ We also created a text area field namely reason for recommend to let the interviewer write the reason for recommendation.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Review' under 'OBJECT MANAGER'. A sidebar on the left lists various setup options, with 'Fields & Relationships' selected. The main table, 'Fields & Relationships', lists 13 items. The visible items are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Core Competencies	Core_Competencies__c	Picklist		
Core Competencies Comments	Core_Competencies_Comments__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
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)		✓

**Fig :** Created custom fields on review object

## Customizing user interface for the recruiting application

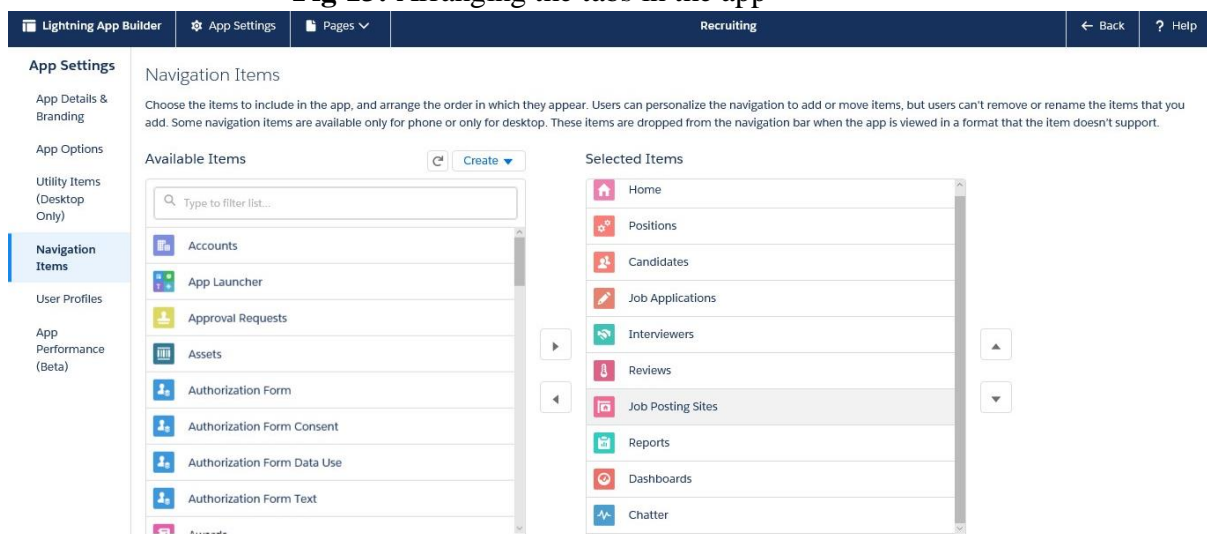
We continue to configure Recruiting App for this project, which is used by the HR team as they work to place candidates in open roles within the organization. We would like to see her recruiters have an effective user interface that helps them match the right candidate with the right job faster

- **Creating a tab for review object**

We start by creating a tab for review object.

- ✓ Click on setup and select tabs by searching in the quick find box and click on new.
- ✓ Select the review object and select the tab style thermometer for the review object.
- ✓ Click next and save.
- ✓ Now customize the tab according to the user by reordering the tabs in the recruiting app.
- ✓ Enter app manager in quick find box and find recruiting and select edit .
- ✓ Click on navigation items and now add review and job posting to be displayed on the recruiting app.
- ✓ We can also reorder the tabs according to our own convenience.
- ✓ Click save and exit.

**Fig 13: Arranging the tabs in the app**



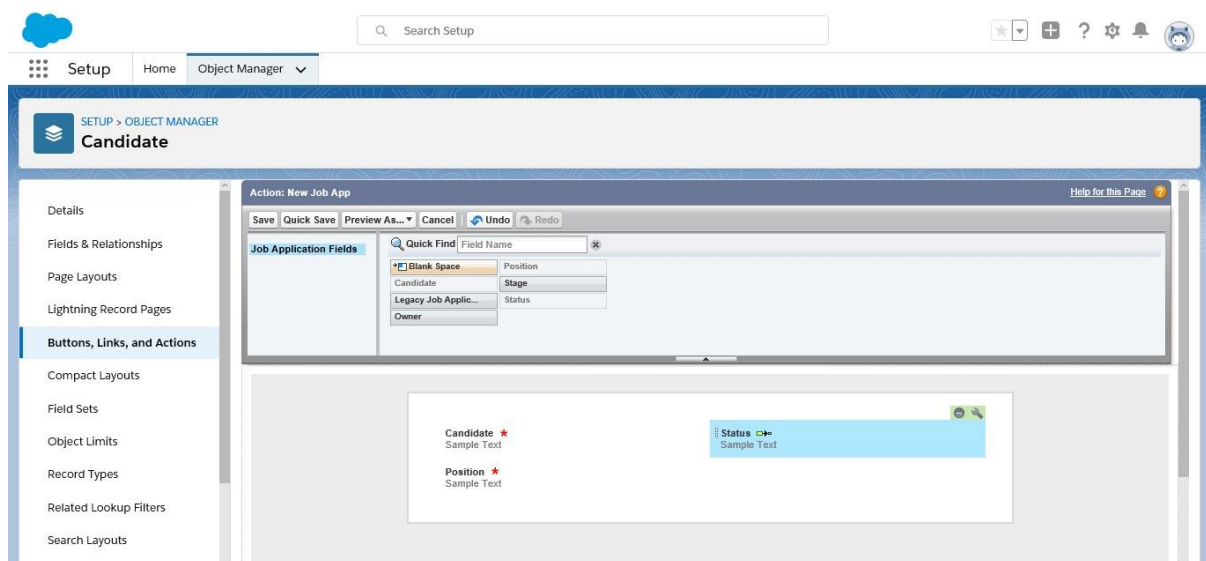
## Creating object specific quick actions

Users can use object-specific behavior to create records which have automatic links to other records, make changes to document records and interact with the document records in distinguishing ways.



- ✓ From setup->object manager select candidate object and click on button, links and actions.
- ✓ Click on new action and create an action of type create a record and label it as New job app and select the target object as job application and click save.
- ✓ Now customize the layout by including status right next to the candidate field.
- ✓ Click save to save the layout.

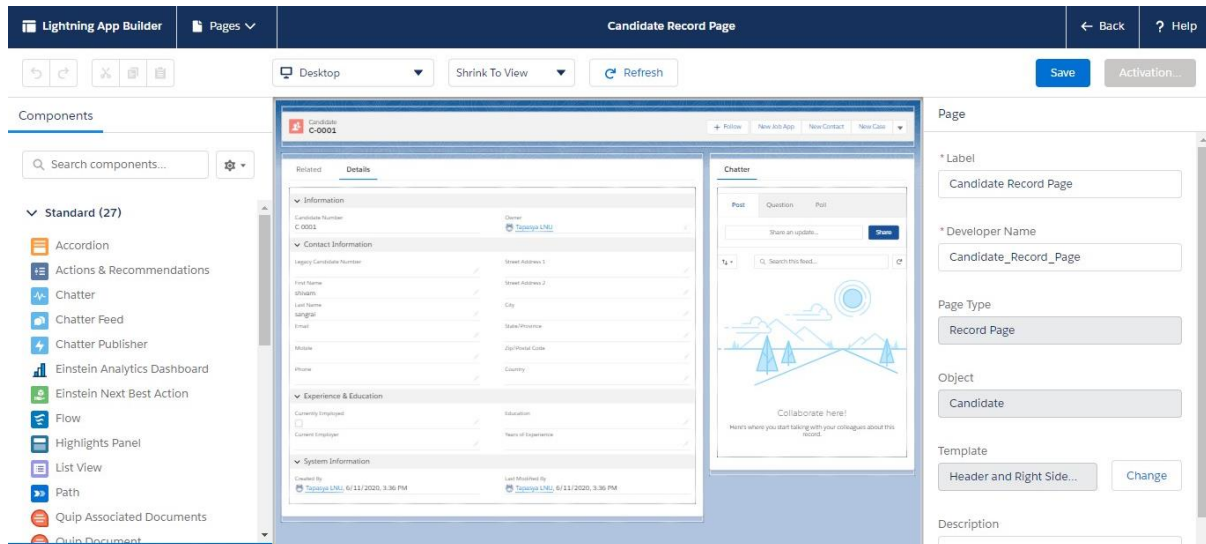
**Fig : Candidate object layout customized**



## Creating custom record page for candidate object

When we create a record page for any object then we can easily add or drop or reorder the lightening components.

- ✓ From the app launcher select the recruiting app and then click on candidate object to create a new entry.
- ✓ Enter the first name and the last name and then save the entry.
- ✓ From setting click on edit page and now move the components according to the convenience like recent items on top of related lists.
- ✓ We can also assign this as the default page.



**Fig : Candidate record page**

## Creating record types on the position object

We would like to hire managers so that they can only create new positions for their own departments. We want technical hiring managers, for example, to create positions for their IT and Engineering departments only. You can do this with a tailored type of record. Record types specify which features, including fields, position and properties, are available on page layouts

- ✓ Enter profiles in the quick find box and clone the standard user profile to create two new profile recruiting: technical and recruiting: nontechnical.
- ✓ Now from object manager select position and click on record types to create two new record types for position object.
- ✓ First record type is Technical position which is enables only for recruiting technical profile and includes only IT and engineering options in its department field.
- ✓ The other record type is Non-technical position which is enabled only for recruiting: non- technical profile and it includes finance sales and support values in the department field.

Cloud logo | Search Setup | 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

#### Page Layouts

3 Items, Sorted by Page Layout Name

Q Quick Find

New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Non Technical Pagelayout	rupali chouksey, 02/06/2023, 5:06 pm	rupali chouksey, 03/06/2023, 12:15 am	▼
Position Layout	rupali chouksey, 02/06/2023, 12:46 pm	rupali chouksey, 02/06/2023, 6:21 pm	▼
Technical Position Layout	rupali chouksey, 02/06/2023, 5:05 pm	rupali chouksey, 03/06/2023, 12:15 am	▼

Activate Windows  
Go to Settings to activate Windows.

**Fig : Technical position record type**

Cloud logo | Search... | Recruiting Applicati... | Home | Positions | Candidates | Job Applications | Reviews | JOB Postings | Employment Website | Reports | Dashboards

JOB Postings

Recently Viewed

4 items • Updated 26 minutes ago

JOB Posting Number

1	JP-0004
2	JP-0003
3	JP-0002
4	JP-0001

### New Position

Select a record type

☒ Technical Position  
Create Technical Position Record Type

☐ Non Technical Position  
Non Technical Record Type

Cancel Next

## Improving data quality for the recruiting application

The data entered by the HR team in the recruiting must be consistent. For, this we will use the cross-object formulas to avoid inconsistency.

- Creating cross object formula

We start by creating cross object formulas so that candidates full name is displayed on the review object.

- ✓ From the object manager select review object and click on fields and relationships.
- ✓ Create a new formula field with label Candidate name of return type text to return the full name of candidate.
- ✓ Now the advanced formula in the section and check for the syntax.
- ✓ Click save if the syntax is correct.

**Fig :** Candidate name formula field

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'New Custom Field' and 'Step 3: Enter formula'. It includes a 'Quick Tips' box with links to 'Getting Started' and 'Operators & Functions'. The formula editor shows the following formula: `Job_Application__r.Candidate__r.First_Name__c & " " & Job_Application__r.Candidate__r.Last_Name__c`. The field type is set to 'Text'.

- ✓ Create another formula field to display the position title.
- ✓ Now customize the page layout by creating a new section and adding the candidate name and position title to it.

## Creating validation rules

Next, we create validation rules to set some standards according to which only the user must enter the data. They improve the data integrity and also prevent the entry of invalid data. First, we create a validation rule that says that **Minimum pay should not be greater than Max pay**. From setup->Object manager, select position and click validation rules.

- ✓ Enter the rule name and other details like description and error message.
- ✓ Enter the formula in the advanced formula section and then check the syntax of the formula,
- ✓ If it includes no syntax errors click save.

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is 'Setup > OBJECT MANAGER > Position'. The left sidebar lists various configuration options. The main content area is titled 'Position Validation Rule' and contains a 'Validation Rule Detail' section. The rule is named 'Min\_pay\_should\_not\_be\_greter\_than\_max\_pa' and is active. The error condition formula is 'Min\_pay\_\_c < Max\_pay\_\_c'. The error message is 'Enter Correct Amount Min pay should not be greter than max pay'. The error location is 'Top of Page'. The rule was created by 'rupali.chouksey' on 02/06/2023 at 6:01 pm.

Validation Rule Detail		Active	✓
Rule Name	Min_pay_should_not_be_greter_than_max_pa		
Error Condition Formula	Min_pay__c < Max_pay__c		
Error Message	Enter Correct Amount Min pay should not be greter than max pay	Error Location	Top of Page
Description			
Created By	rupali.chouksey, 02/06/2023, 6:01 pm	Modified By	rupali.chouksey, 02/06/2023, 6:01 pm

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is 'Setup > OBJECT MANAGER > Position'. The left sidebar lists various configuration options. The main content area is titled 'Position Validation Rule' and contains a 'Validation Rule Detail' section. The rule is named 'Validate\_closed\_date' and is active. The error condition formula is 'AND(ISBLANK( Closed\_Date\_\_c ), OR ( ISPICKVAL( Status\_\_c , 'Closed-Filled' ), ISPICKVAL( Status\_\_c , 'Closed-NOT APPROVED' ), ISPICKVAL( Status\_\_c , 'Closed-CANCELED') ) )'. The error message is 'Please populate closed filed'. The error location is 'Top of Page'. The rule was created by 'rupali.chouksey' on 02/06/2023 at 6:16 pm.

Validation Rule Detail		Active	✓
Rule Name	Validate_closed_date		
Error Condition Formula	AND(ISBLANK( Closed_Date__c ), OR ( ISPICKVAL( Status__c , 'Closed-Filled' ), ISPICKVAL( Status__c , 'Closed-NOT APPROVED' ), ISPICKVAL( Status__c , 'Closed-CANCELED') ) )		
Error Message	Please populate closed filed	Error Location	Top of Page
Description			
Created By	rupali.chouksey, 02/06/2023, 6:16 pm	Modified By	rupali.chouksey, 02/06/2023, 6:16 pm

## Creating rollup summary fields

Now that we know a lot of data has been entered about candidates, we know that for the data to be useful it needs to be calculated and scored. For this we use rollup summary fields.

- ✓ From setup->Object manager, select job application object and click fields and relationships.
- ✓ Select rollup summary field and click next.
- ✓ Enter the label and select reviews object from the summarized object picklist.
- ✓ Select count from the list as the roll type and ensure that all the fields are selected for the review and click next, next and save.

The screenshot shows the Salesforce Setup interface for configuring a custom field. The breadcrumb trail is 'Setup > OBJECT MANAGER > Job Application'. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The main content area is titled 'Job Application Custom Field' and 'Number of review'. It includes a 'Back to Job Application' link and buttons for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays the following details:

Field Label	Number of review	Object Name	Job Application
Field Name	Number_of_review		
API Name	Number_of_review__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	rupali.chouksey, 02/06/2023, 11:35 pm	Modified By	rupali.chouksey, 02/06/2023, 11:35 pm

The 'Roll-Up Summary Options' section shows the following configuration:

Data Type	Roll-Up Summary	Summary Type	COUNT
Summarized Object	Review		
Filter Criteria			

An 'Activate Windows' watermark is visible in the bottom right corner of the screenshot.

### Rollup summary field for the count of reviews

Create another rollup summary field for finding the total review score using the same procedure but select sum instead of count from the rollup types. Also modify the page layout by creating a new section and dragging the two rollup summaries into this section for the reviews

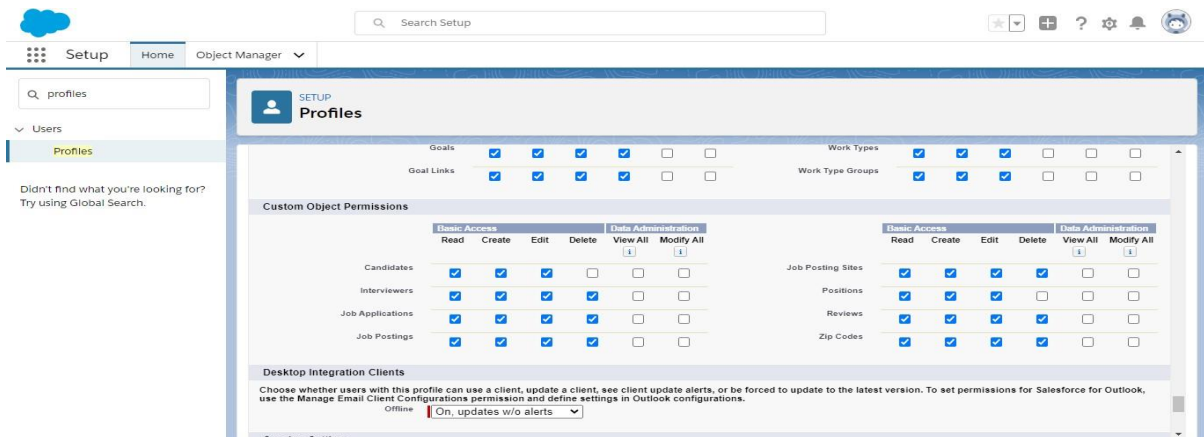
## **Keeping data secure in the recruiting app**

One of the most important steps is to keep the data secure in the app. This may be done using the permission sets, sharing settings so that the users see only that data that they need to see. The first step is to create a HR recruiting profile and set the standard user profile for all the users.

- **Create custom profile HR Recruiter**

The first step is to create a HR recruiting profile and set the standard user profile for all the users.

- ✓ From setup enter Profiles in the quick find box.
- ✓ Select Standard User profile and click on clone. This created a same profile as Standard User.
- ✓ Enter the name as the HR Recruiter and save.
- ✓ Now click edit on the profile and on the custom object permissions set the permissions of edit, create, delete, read on all the custom objects so that the profile is accessed by those who are allowed to access.
- ✓ Finally click save and the profile for HR Recruiter is created.



Profile Permissions set for custom objects

- Creating permission sets, Field level security and sharing settings.

Now we create additional permissions for the users on the basis of which they can access the data

- ✓ From the setup enter the permission sets in the quick find box and click new.
- ✓ Enter the label and description and user license as salesforce.
- ✓ In the app section click on assigned apps and click edit.
- ✓ Add recruiting app from the available app list to the enabled apps.
- ✓ Click, save.
- ✓ From the assigned app list select object settings and click on interviewer object and click on edit.
- ✓ Now enable the object settings as visible, read, create, edit.
- ✓ Click save and enable permissions set for other objects also.





## Automate Business process for recruiting app

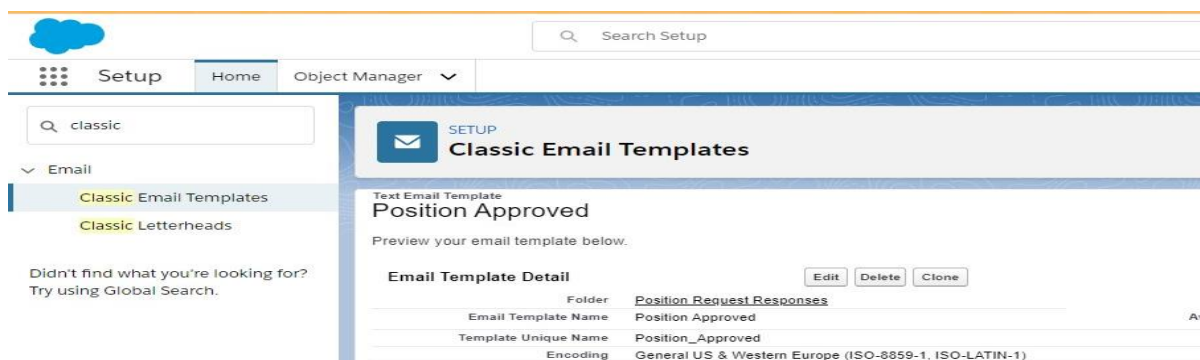
We need to automate the business process for our recruiting application.

- **Lay the groundwork for approval process**

Before creating the approval process, we need to do some pre work like creating some email-templates and a folder to host them.

- ✓ Enter classic email templates in the quick find box and select it.
- ✓ Click on create new folder and enter the folder name and give access of read/write to it and make sure that it is accessible by all the users.
- ✓ Now click on new template and create one for position approved by entering all the details like template name and email body .

### Classic email template for position approved



Now create another template similarly for position declined and also create few fields for the position object and modify the layout by creating a new section and dragging the newly created field on those sections.

## Creating an approval process

Approval process is a process that approves the records. When we create an approval process, we specify all the criteria needed for approving the process.

The criteria can be dedicated to a single record or multiple records.

- ✓ Enter approval process in the quick find box and select it.
- ✓ Select position object from the manage process as the process is created for position object.
- ✓ Click on create new approval process and enter the details such as name and description.
- ✓ Click next, next and save.
- ✓ Select the fields that you want to add in the approval process page layout and add them.
- ✓ Ensure that display proper history, approve all the users to access the page and position owner is visible.
- ✓ Click save.

### Approval process created

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'appro' entered. Under 'Process Automation', 'Approval Processes' is selected. The main content area is titled 'Approval Processes' and shows 'Position: New Position Approval'. Below this, the 'Process Definition Detail' table is displayed.

Process Definition Detail			
Process Name	New Position Approval	Active	1
Unique Name	New_Position_Approval	Next Automated Approver Determined By	Manager of Record Owner
Description	All positions must be approved by the recruiter's manager and two to three other approvers. These approvers are tracked in approver fields on the Position object.		
Entry Criteria			
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	✓
Approval Assignment Email Template			
Initial Submitters	Position Owner		

Now we need to create Approval steps for the approval process.

- ✓ Enter the name and click next and select all the all records should enter it.
- ✓ Then select automatically apply to all approvers and then select approver 1 from the related list and approver and click save.

This way creates 3 more approval steps for approver 2 and approver 3.

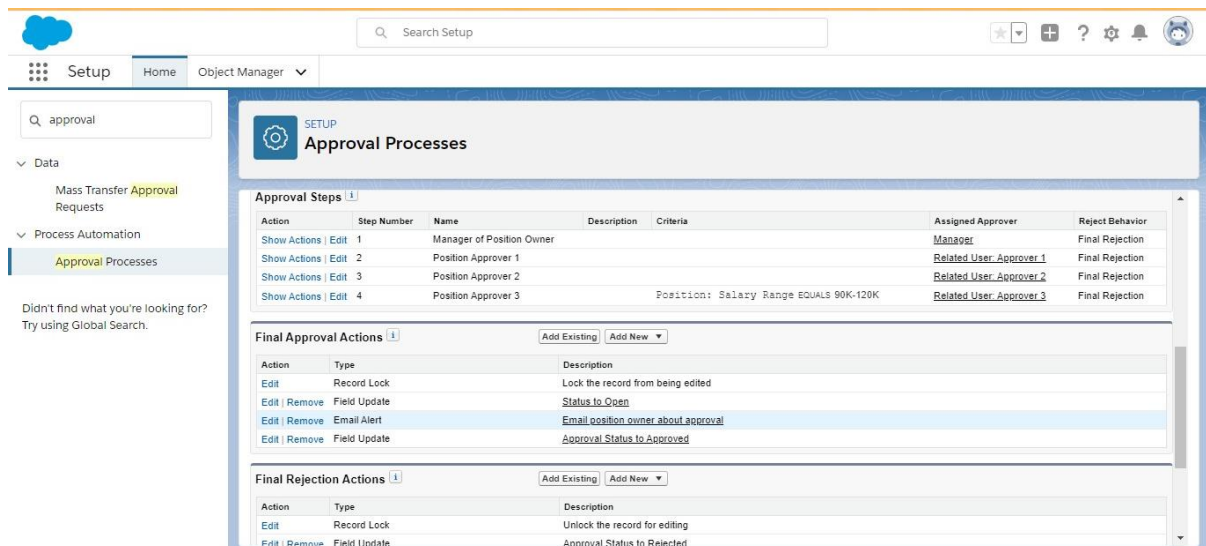
Now we create final approval actions.

- ✓ Under the final approval actions click create and select field update.
- ✓ Enter the details and for field to update select approval status and then select the specified value as approved.
- ✓ Click save and new.
- ✓ Using the above steps create more final actions for status field with specific value new and for email alert select the position approved template and select the recipient as owner.

Then we create final rejected actions

- ✓ Under the final rejected actions click create and select field update.
- ✓ Enter the details and for field to update select approval status and then select the specified value as rejected.
- ✓ Click save and new.
- ✓ Using the above steps create more final actions for status field with specific value closed and for email alert select the position rejected template and select the recipient as owner.

We can create few more actions for our approval steps that all depends upon own company's recruiting convenience.



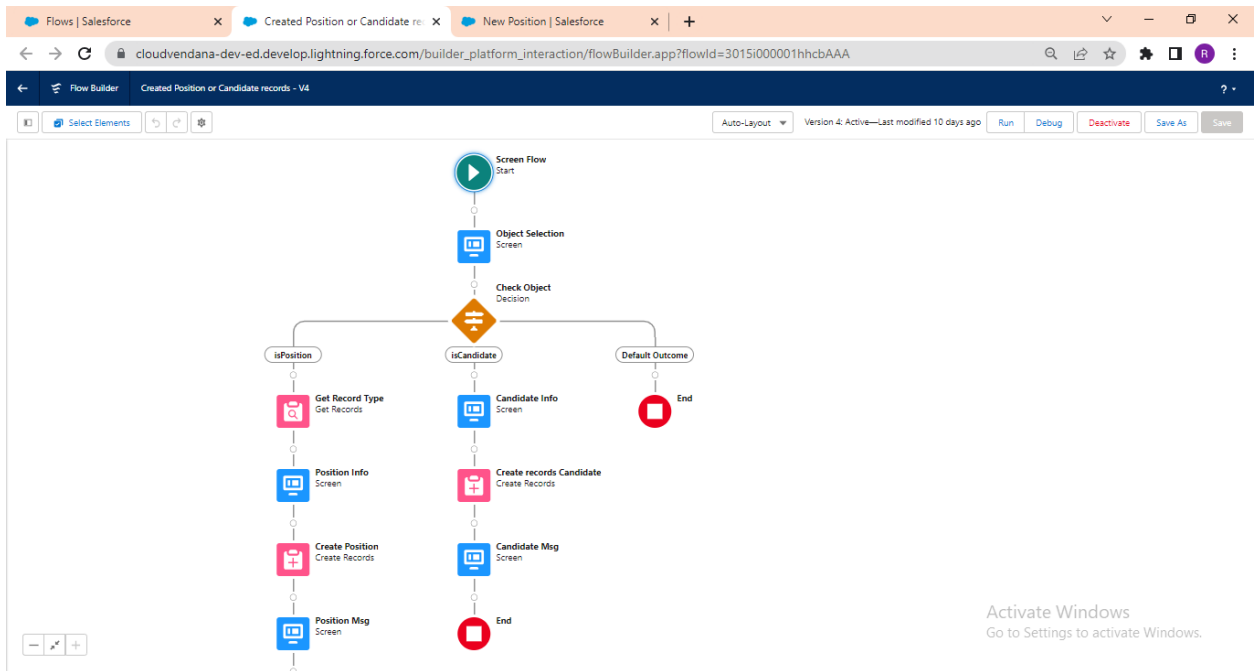
Approval process with certain actions

- **Creating a process for automatic submitting positions for approval**

Since now we have created an approval process, we automate the system by creating a process that automatically submits new positions for approval.

- ✓ Enter process builder in the quick find box and select it
- ✓ Enter the process name and the process will start when a record is changed and click save.
- ✓ Select the object position to be object on which the process will work.
- ✓ Now click on add criteria and enter the criteria name.
- ✓ For executing actions select the options criteria are met.
- ✓ Now choose the criteria according to which the action will take place.
- ✓ Click, save.
- ✓ Click on immediate actions and enter the details
- ✓ Click save activate and then confirm.

We have created an automated process for our recruiting app which will automatically submit the positions for approval.



**Fig :** Flows is created for automation.

# **Conclusion**

## **Conclusion**

Salesforce a recruiting app was developed with the help of which the recruiting process for any company can be made easier and time consuming as well as the data can be entered in the application about the recruiters and nothing needs to be done manually. Every calculation can be done with the help of this application in just few clicks. Remarks and comments can be entered, they can be compared, the information can be analyzed and the whole process is automated.

Even more things can be added in this project to increase its performance. However this is just a basic version of a recruiting application.