Job Application Tracking System

SALESFORECE NAAN MUDHALVAN

PROJECT REPORT

Submitted By

SUBRAMANIAN K (611220205038)

SANTHOSH K R (611220205031)

SEDHUPATHI M (611220205032)

MANIKANDAN A (611220205308)

in partial fulfilment for the award of the

degree of

BACHELOR OF TECHNOLOGY

in

INFORMATION TECHNOLOGY

KNOWLEDGE INSTITUTE OF TECHNOLOGY,

SALEM-637504

ANNA UNIVERSITY::CHENNAI 600025

BONAFIDE CERTIFICATE

Certified that this project report titled **"JOB APPLICATION TRACKING SYSTEM"** is the bonafide work of **"SUBRAMANIAN K (611220205038), SANTHOSH KR (611220205031), SEDHUPATHI M (611220205032) and MANIKANDAN A (611220205308) "**who carried out the projectwork under my supervision.

SIGNATURE	**SIGNATURE**
Mr. R. AYYAPPAN. ME.,	**Mr. T. KARTHIKEYAN B.TECH,M.S(IT),Ph.D,**
ASSISTANT PROFESSOR	**ASSISTANT PROFESSOR**
FACULTY MENTOR	**SPOC FACULTY**
Department of Information Technology,	Department of Computer Science and Engineering,
Knowledge Institute of Technology,	Knowledge Institute of Technology,
Kakapalayam,	Kakapalayam,
Salem- 637 504.	Salem- 637 504.

--   --

SPOC	**HEAD OF THE DEPARTMENT**

ACKNOWLEDGEMENT

At the outset, we express our heartfelt gratitude to god**,** who has been our strength to bring this project to light.

At this pleasing moment of having successfully completed our project, we wish to convey our sincere thanks and gratitude to our beloved president **Mr.C.BALAKRISHNAN,** who has provided all the facilities to us.

We would like to convey our sincere thanks to our beloved Principal **Dr.PSS.SRINIVASAN,** for forwarding us to do our project and offering adequate in completing our project.

We express our sincere thanks to our Head of the Department **Dr.P.SACHIDHANANDAM,** Department of Information Technology for fostering the excellent academic climate in the Department.

We express our pronounced sense of thanks with deepest respect andgratitude to our Faculty Mentor **Mr.R.AYYAPPAN,** Department of Information Technology for their valuableand precious guidance and for having amicable relation.

With deep sense of gratitude, we extend our earnest and sincere thanksto our SPOC **Mr.T.KARTHIKEYAN,** Assistant Professor, Department of Computer Science and Engineering for his guidance and encouragement during this project.

We would also like express our thanks to all the faculty members of our Department, friends and students who helped us directly and indirectlyin all aspects of the project work to get completed successfully.

TABLE OF CONTENTS

LIST OF FIGURES

LIST OF ABBREVIATION

CRM	Customer Relationship Management
ESP	Email Service Provider
UI	User Interface
UX	User Experience
OWD	Org - Wide Default
CTA	Call To Action
CSV	Comma - Separated Values
SLA	Service Level Agreement
API	Application Programming Interface
SaaS	Software as a Service
PaaS	Platform as a Service

CHAPTER - 1
INTRODUCTION

Salesforce, a leading cloud-based Customer Relationship Management (CRM) platform, is a pivotal tool for organizations to manage customer data, optimize sales processes, and elevate customer interactions. Its multifaceted features include Sales Cloud, which enhances sales management through lead tracking, opportunity management, and seamless email integration.

Service Cloud focuses on exceptional customer support, featuring case management, knowledgebase development, and multi-channel support. Marketing Cloud empowers businesses with marketing automation, email campaigns, social media engagement, and in-depth analytics. Salesforce's hallmarkis its customizability, allowing businesses to tailor the platform to meetspecific requirements, while robust integration capabilities facilitate seamless connections with other business applications.

The platform equips businesses with powerful reporting and analytics tools, enabling data-driven decisions and insightful, customized reports and dashboards. It ensures mobile accessibility, enabling users to stay connected and productive while onthe move.

Through Salesforce, organizations foster improved customer relationships, increased sales efficiency, and superior customer support. This introduction encapsulates Salesforce's capabilities and benefits, offering a concise overview for your project document, allowing for a better understanding of how the platform can contribute to project goals.

CHAPTER - 2
PROJECT SPECIFICATIONS

2.1 Project Goal:

The goal of this project is to create a CRM (Customer Relationship Management) application tailored for job applicants, designed to streamline the job application process. The application will allow users to track the number of job applications they have submitted and provide easy access to job postings from various recruiters.

The project involves technical components such as creating a developer account, defining custom objects and relationships, configuring tabs, and building an application. Additionally, it covers user management, access control, reporting, and dashboards. The objective is to empower users to efficiently manage their job applications and access relevant job listings within the Salesforce platform.

2.2 Project Scope

- **Creation of developer account (Milestone 1):**
  This involves setting up a developer account on the Salesforce platform, which will serve as the foundation for building the CRM application.
- **Object Creation (Milestone 2):**
  Custom objects and relationships will be defined to efficiently store and manage data related to job applications, recruiters, and other relevant information.
- **Tabs Creation (Milestone 3):**
  Tabs will be configured to provide user-friendly access to different sections functionalities within the CRM application.
- **Create App (Milestone 4):**

The CRM application will be created, and it will serve as the central hub for managing job applications and accessing job postings.

- **Fields & Relationships (Milestone 5):**
  Custom fields and relationships will be established to capture specific data attributes related to job applications and recruiters.
- **Profile (Milestone 6):**
  User profiles will be configured to define access permissions and roles within the application.
- **Role and Role Hierarchy (Milestone 7):**
  Role-based access control will be set up to determine who can view and edit specific data within the CRM..
- **Users (Milestone 8):**
  User management will involve adding and configuring user accounts, specifying their roles and access levels.
- **Sharing Rules (Milestone 9):**
  Sharing rules will be defined to ensure that users can appropriately share and access data based on predefined criteria.
- **User Adoption (Milestone 10):**
  Strategies and tools will be implemented to encourage user adoption and make the application user-friendly
- **Reports (Milestone 11):**
  Custom reports will be created to track and analyse job application data, providing valuable insights for users.
- **Dashboards (Milestone 12):**
  Dashboards will be designed to display key performance indicators and visual summaries of application data.

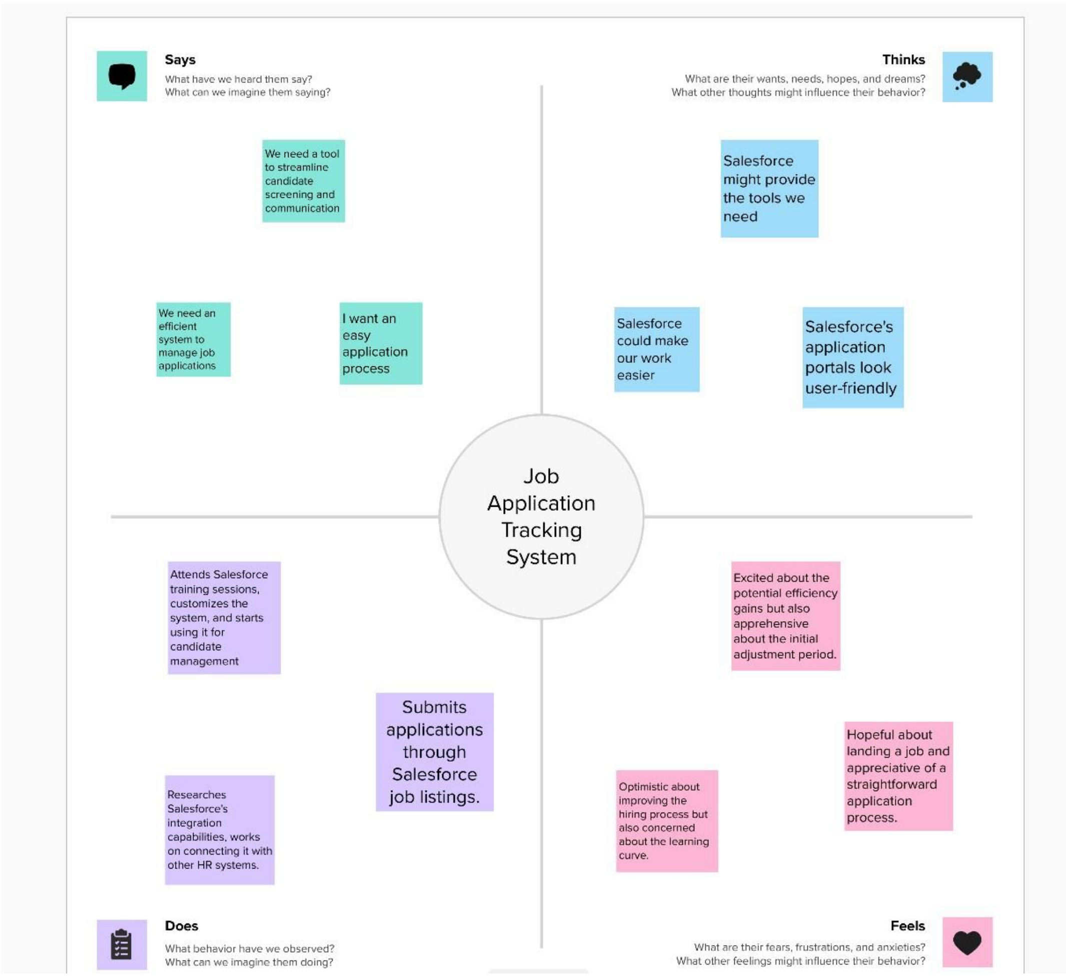
2.3 Problem Statement Definition :

Problem Statement (PS)	I am (Student)	I'm trying to	But	Because	Which makes me feel
PS	Student	Creating a comprehensive Job Application Tracking System using Salesforce to streamline the recruitment process, enhance communication, and improve overall efficiency for HR professionals, job applicants, and hiring managers.	Developing a user-friendly Job Application Tracking System using Salesforce to automate administrative processes, manage applicant data, and facilitate seamless communication between HR professionals, job applicants, and hiring managers.	Developing a Job Application Tracking System using Salesforce to simplify recruitment processes, facilitate better communication, and enhance HR operations for improved hiring outcomes and stakeholder satisfaction.	Developing a user-friendly Job Application Tracking System using Salesforce to provide a seamless and empowering experience for all stakeholders, fostering a sense of ease and satisfaction throughout the recruitment process.

2.3 Empathy Map Canvas:

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

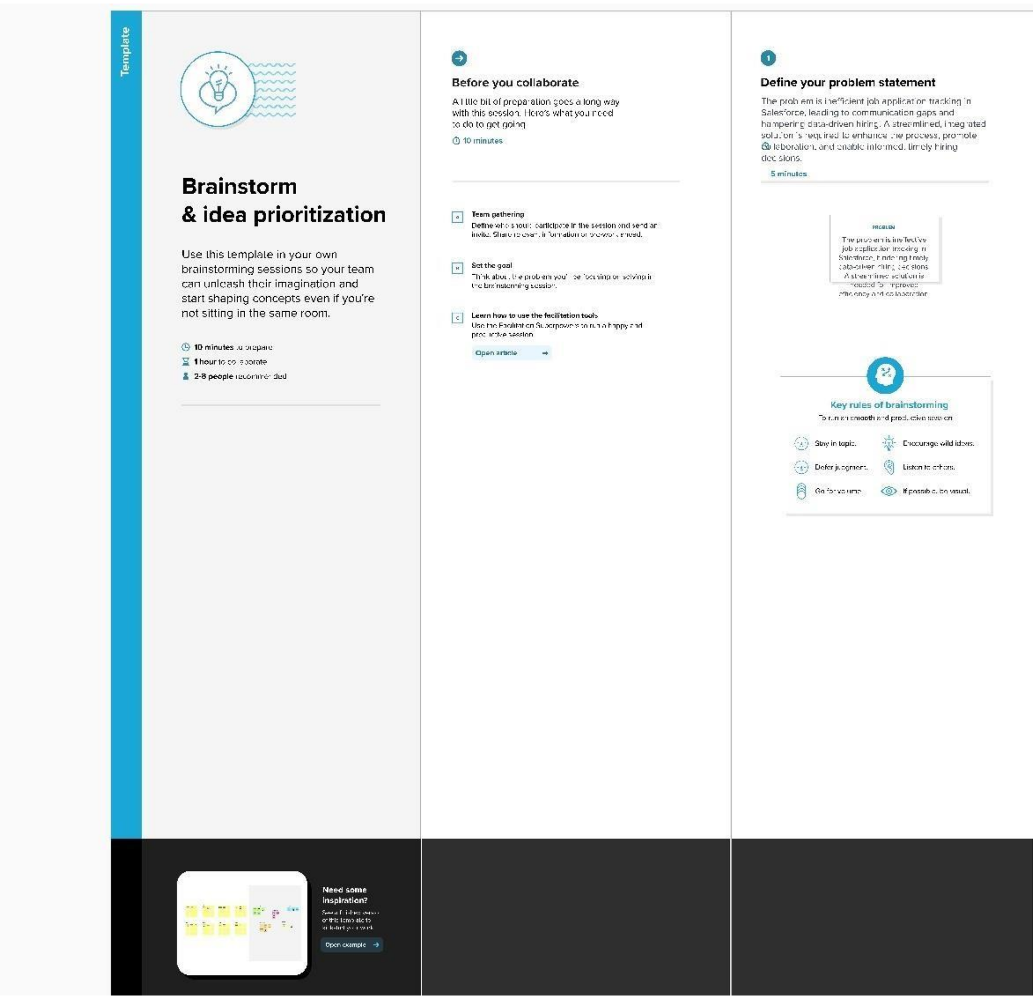
It is a useful tool to helps teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.



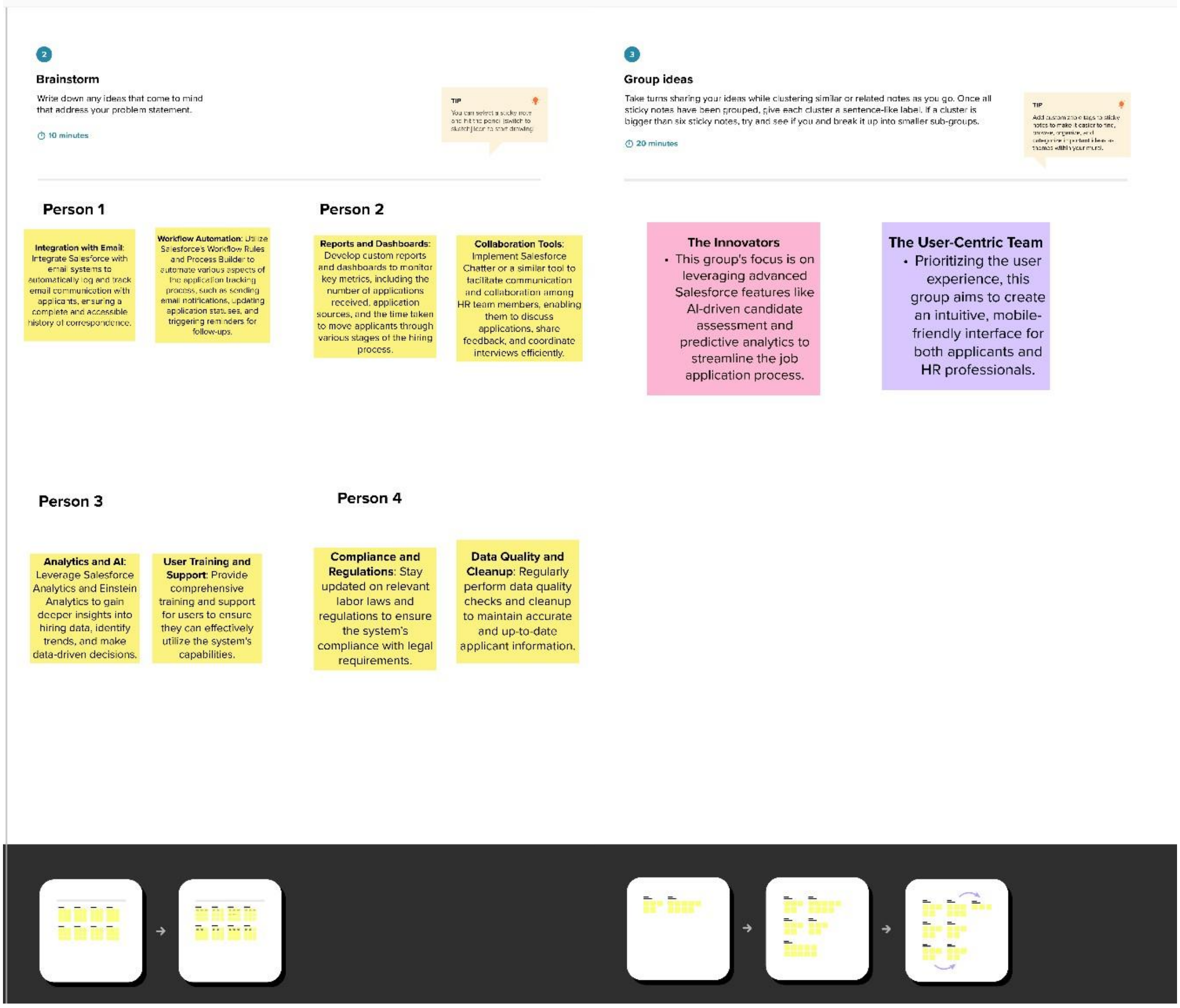
2.3Ideation&Brainstorming:

Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other rich amount of creative solutions.

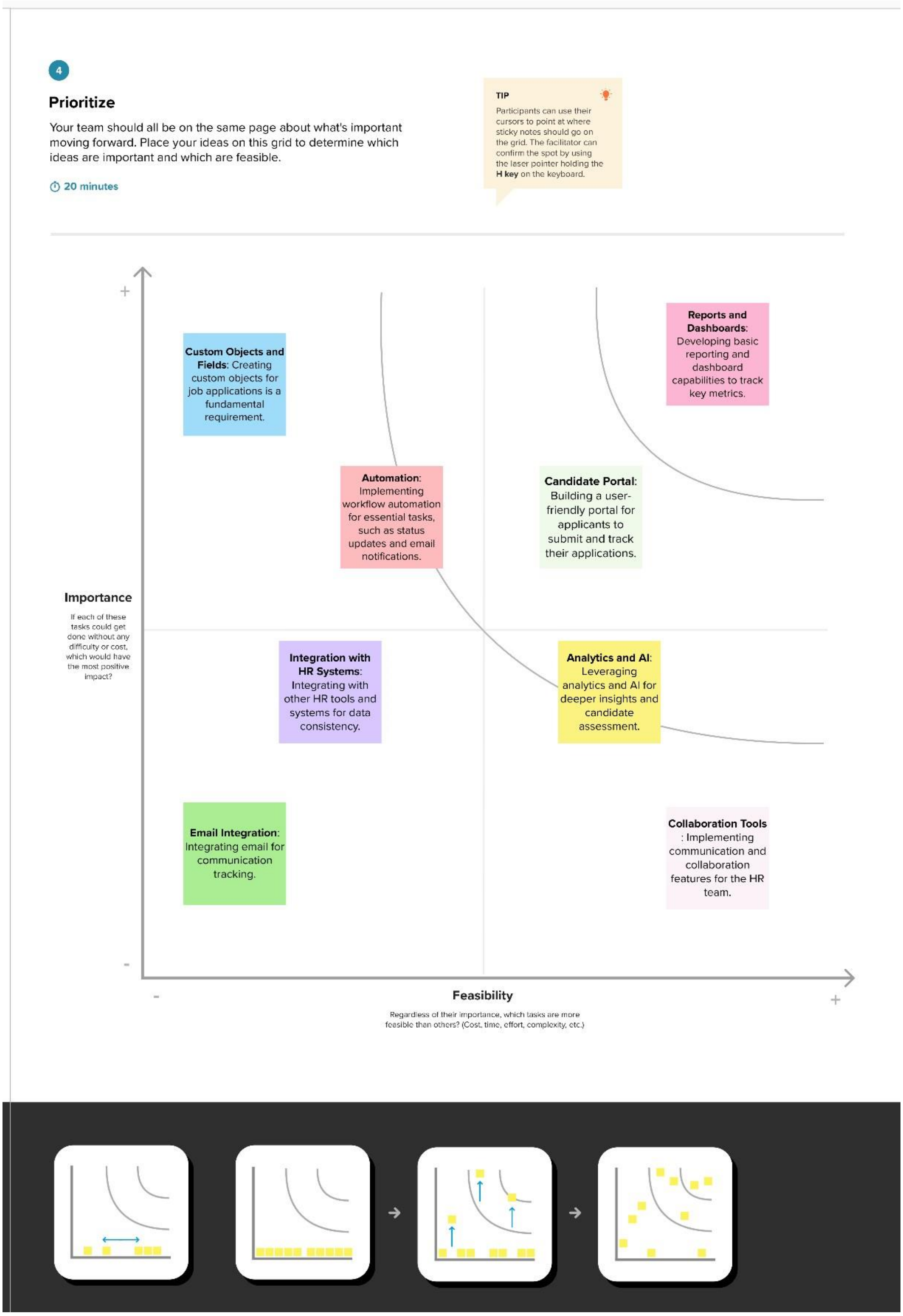
Step-1: Team Gathering, Collaboration and Select the Problem Statement:



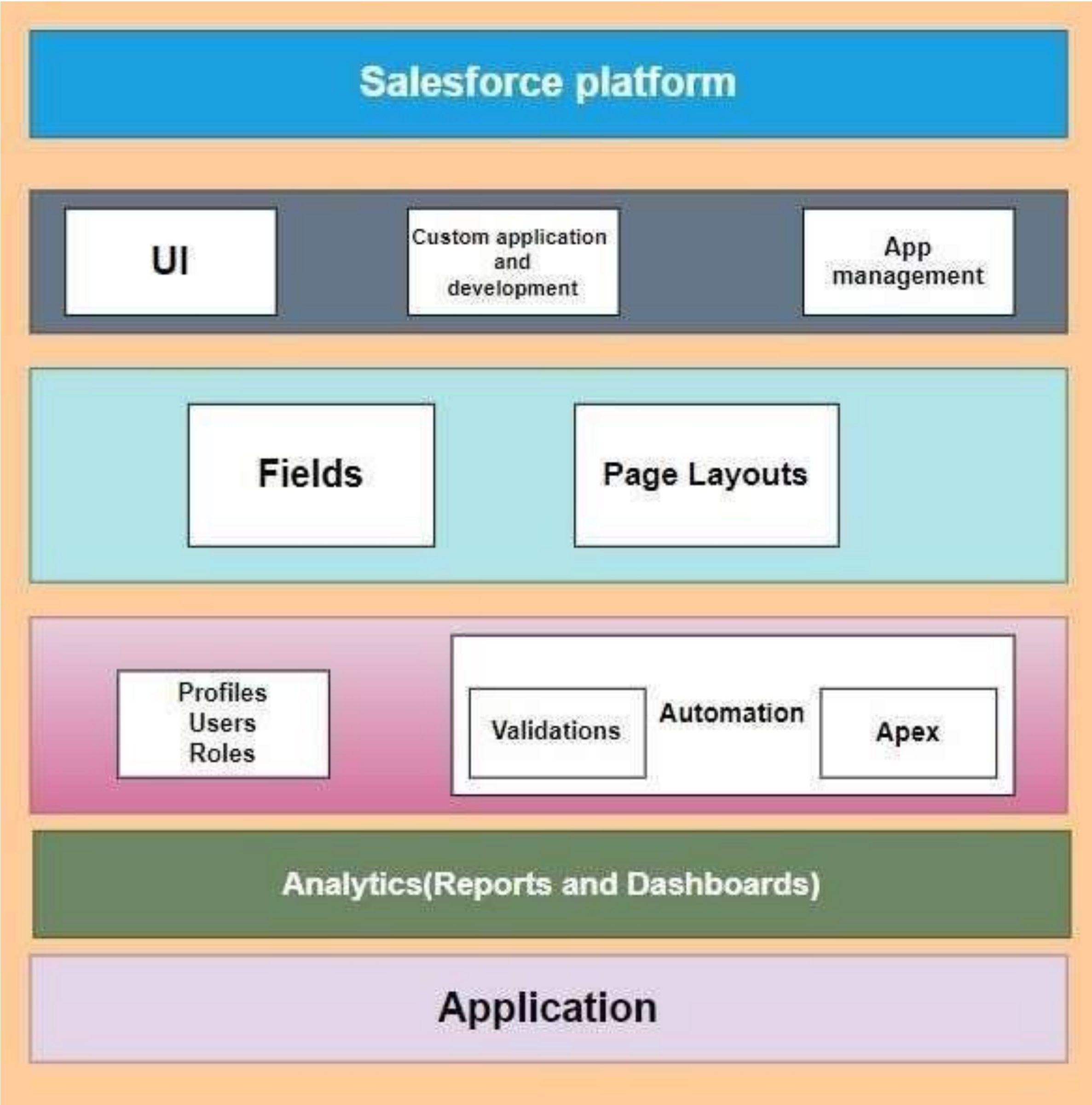
Step-2: Brainstorm, Idea Listing and Grouping:



Step-3: Idea Prioritization:



2.3 Technical Requirements



2.3 Functional Requirements

- **User Registration and Authentication:** Users should be able to create accounts with unique usernames and passwords. User authentication and authorization should be implemented to ensure data security.
- **Dashboard:** Users should have a personalized dashboard displaying key metrics such as the number of job applications submitted and the status of each application.
- **Job Application Tracking:** Users should be able to record details of each job application, including the job title, company, date applied, application status, and any related notes. Users should be able to filter and search through their job applications.
- **Job Postings:** : Job postings from various recruiters should be accessible within the application. Users should be able to view details of job postings, such as job descriptions, qualifications, and application deadlines.
- **Custom Objects and Relationships:** Custom objects for job applications, job postings, and recruiters should be defined with appropriate relationships. Relationships between applicants and their job applications, as well as between job applications and job postings, should be established.
- **Profile Management:** Users should have the ability to edit their profiles and update personal information. Profiles should

include user-specific settings and preferences.

- **Role-Based Access Control:** Access permissions should be defined based on user roles (e.g., applicant, recruiter). Users should only have access to data and features relevant to their roles**.**
- **User Management:** Administrators should be able to add, modify, or deactivate user accounts. User roles and permissions should be customizable.
- **Sharing Rules:** Sharing rules should be configured to allow data sharing based on predefined criteria, ensuring privacy and data access control.
- **Reporting:** Users should be able to generate custom reports based on their job application data. Standard reports and report templates should be available for common use cases.
- **Notifications and Reminders:** Users should receive notifications and reminders for application deadlines, interview schedules, and other important events. Notifications can be delivered via email or within the application.
- **Integration with External Platforms:** Integration with job search platforms or websites to import job postings automatically. Integration with email services to track application-related correspondence.
- **Data Import and Export:** Users should have the capability to import and export their application data for backup or transfer

purposes.

- **User Adoption Features:** Onboarding guides, tutorials, and tooltips to help users navigate and effectively use the system. Feedback mechanisms to collect user suggestions and improve the application.
- **Customization and Configuration:** Administrators should be able to customize the application's appearance, fields, and workflows to suit their organization's needs.
- **Mobile Accessibility:** The application should be accessible on mobile devices to allow users to track job applications on the go.
- **Security and Data Privacy:** Data encryption, secure connections, and compliance with data privacy regulations (e.g., GDPR) should be implemented to protect user data.
- **Scalability:** The system should be scalable to accommodate a growing number of users, job applications, and job postings.
- **Backup and Recovery**: Regular data backups and disaster recovery plan should be in place to prevent data loss.

CHAPTER - 3

OBJECT CREATION

Objects:

Salesforce objects are database tables that permit you to store Data that is specific to an organization. It consists of fields (columns) andrecords (rows).

Salesforce objects are of two types:

1.Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

2.Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

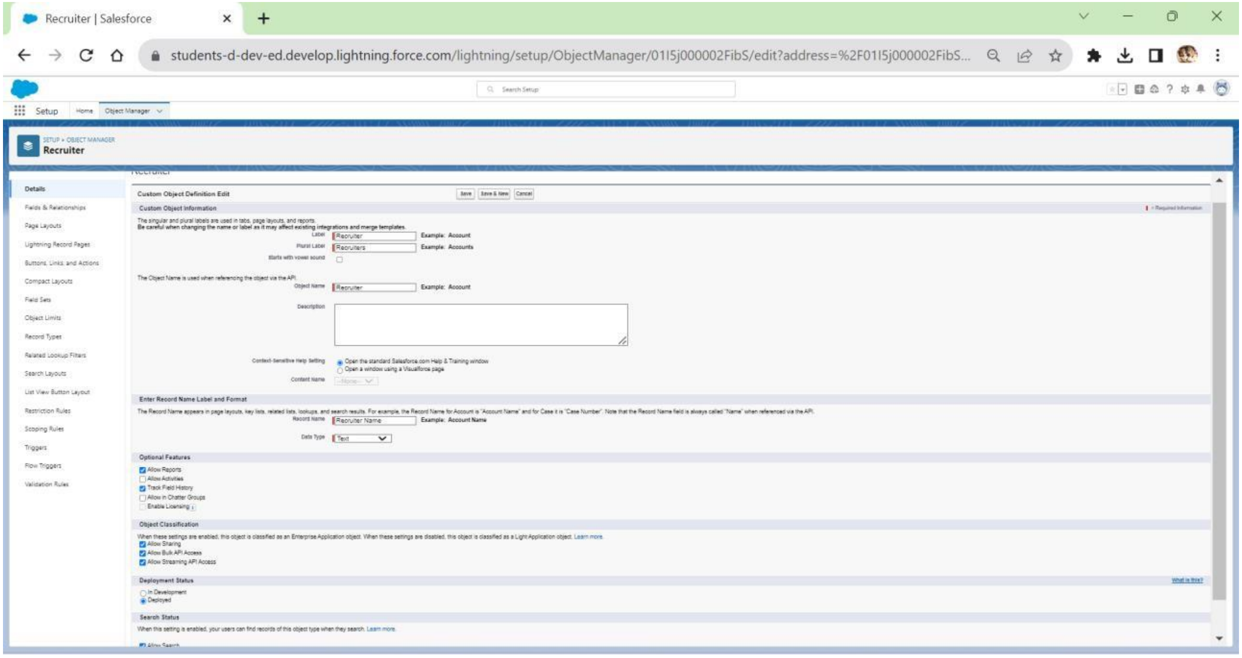
In This Application We Use 4 Custom Objects:

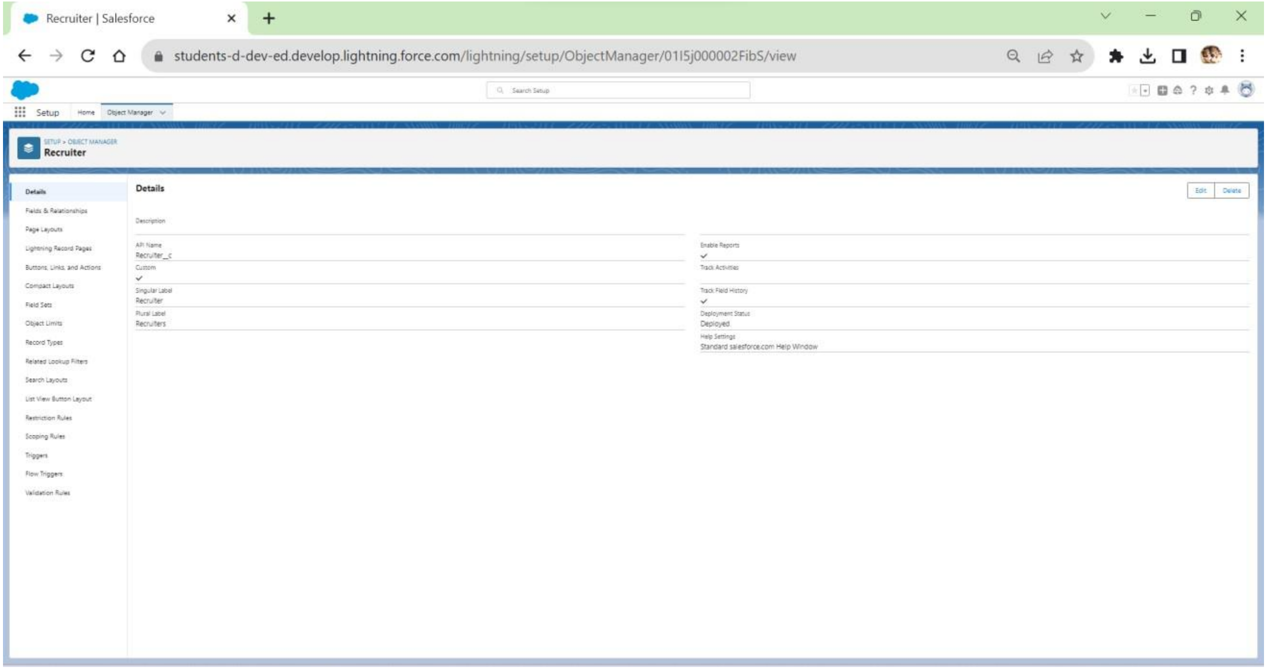
1.Recruiter
2.Jobs
3.Candidate
4.Job-Application

1) Create A Custom Object for Recruiter:

1.From setup click on object manager.
2.Click create, select custom object.
3.Fill in the label as " Recruiter ".
4.Fill in the plural label as " Recruiters".

5.Record name: " Recruiter Name"
6.Select the data type as "Text".
7.In the Optional Features section, select Allow Reports and Track Field History.
8.In the Deployment Status section, ensure Deployed is selected.
9.In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.





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

2)Creation of Jobs Object

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

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

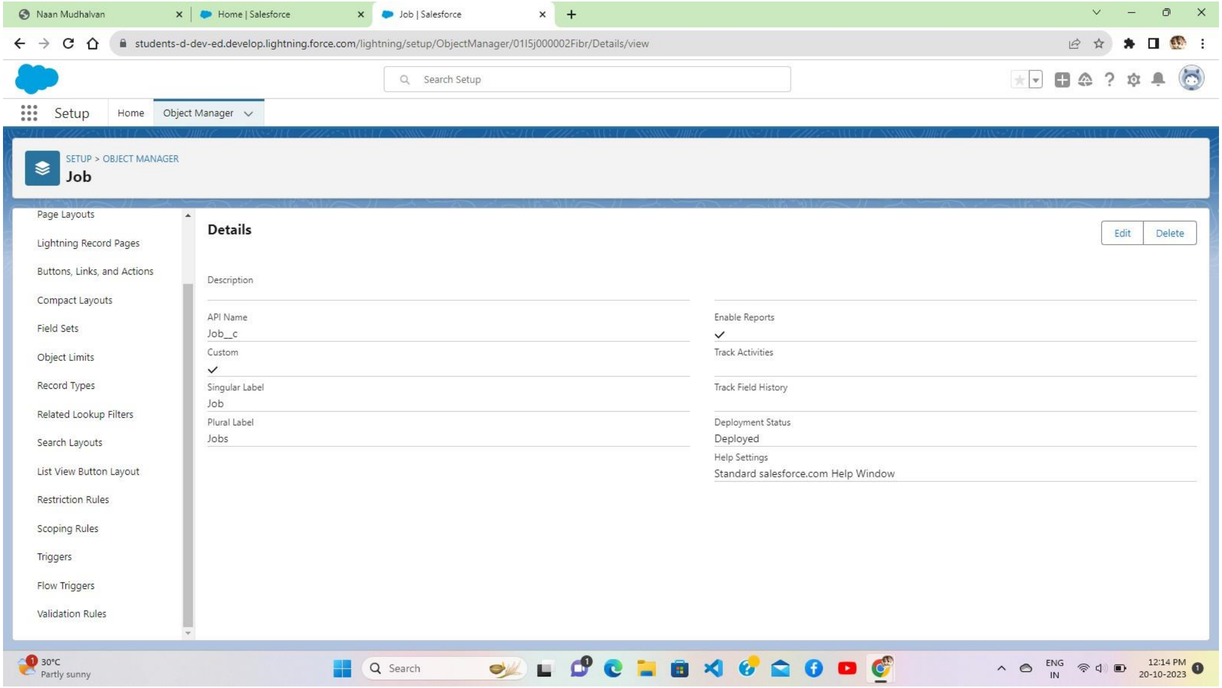
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

4. On the Custom Object Definition page, create the object as follows: 5.Label: Job

6.Plural Label: Jobs 7.Record Name: Job Name

8. Select the data type as "Text". 9.Check the Allow Reports checkbox 10.Check the Allow Search checkbox

11. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout



12. Click Save.

3)Creation of Candidate Object

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

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

3.After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

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

5.Label: Candidate

6.Pural Label: Candidates

7.Record Name: Candidates Name

8.Select the data type as "Text".

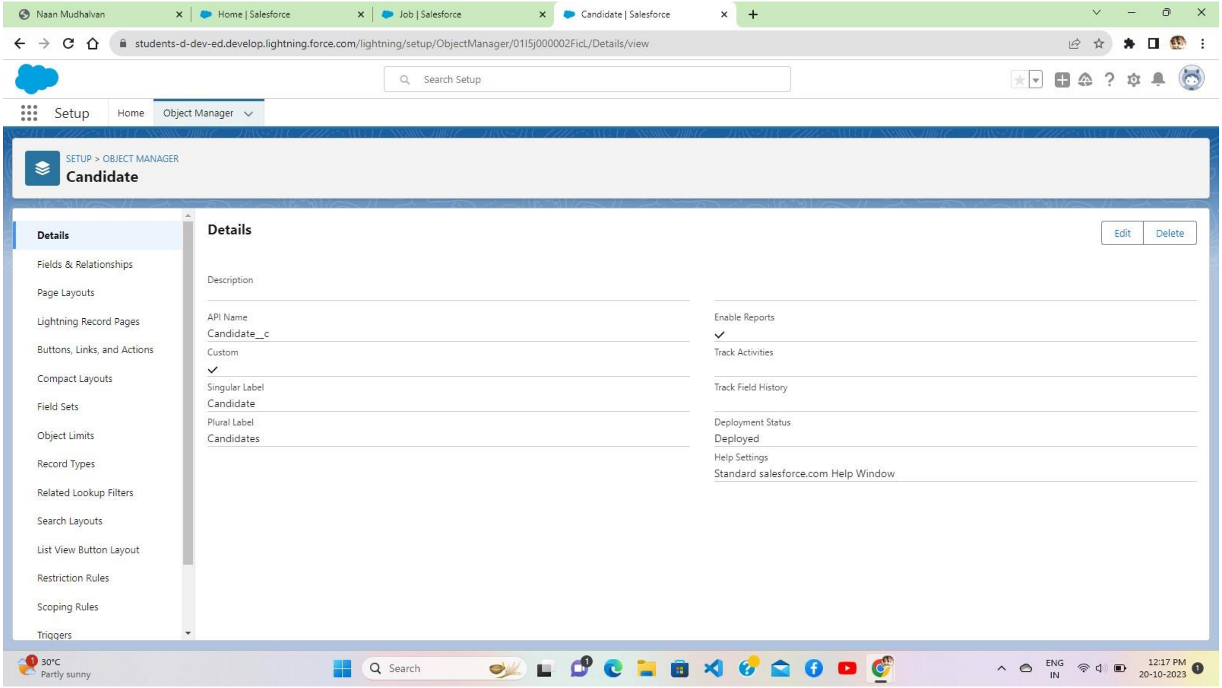
9.Check the Allow Reports checkbox.

10.Check the Allow Search checkbox.

11. In the Object Creation Options section, select Add Notes and

Attachments related list to default page layout.

12. Click Save.



4)Creation of Job Application Object

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

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

3.After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

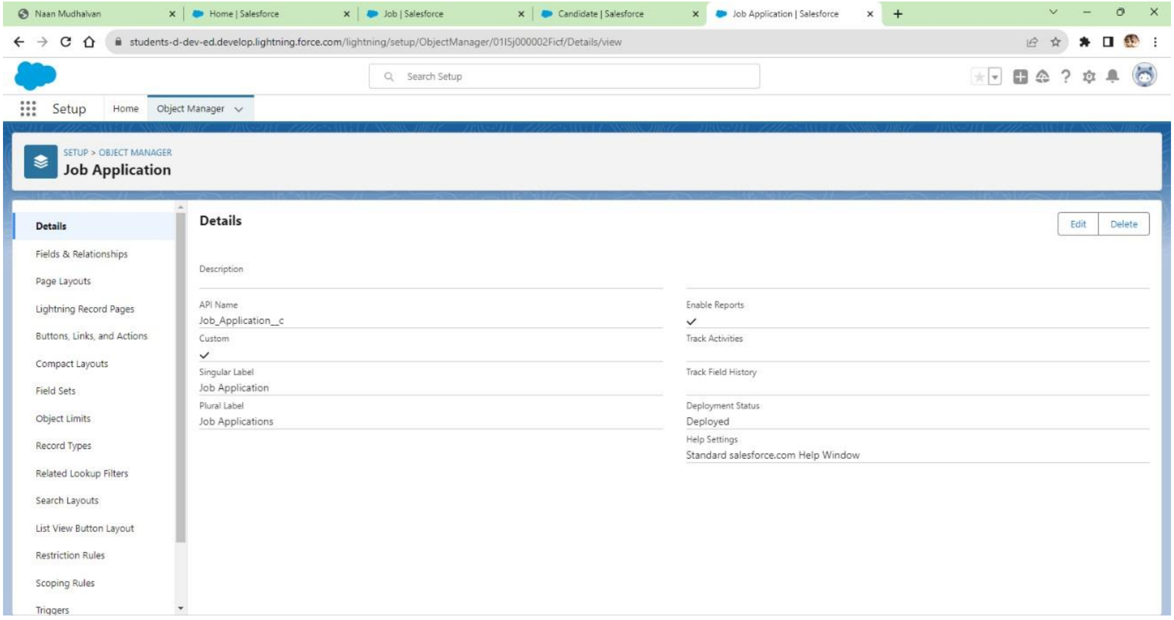
4.On the Custom Object Definition page, create the object as follows:

5.Label: Job Application

6.Plural Label: Job Applications

7.Record Name: Job Application Number

8.Select the data type as "Auto Number".



9.Under display format enter "JP- {0000}"

10.Enter starting number as 1

11.Check the Allow Reports checkbox.

12.Check the Allow Search checkbox.

13. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

14. Click Save.

CHAPTER - 4

TABS:

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

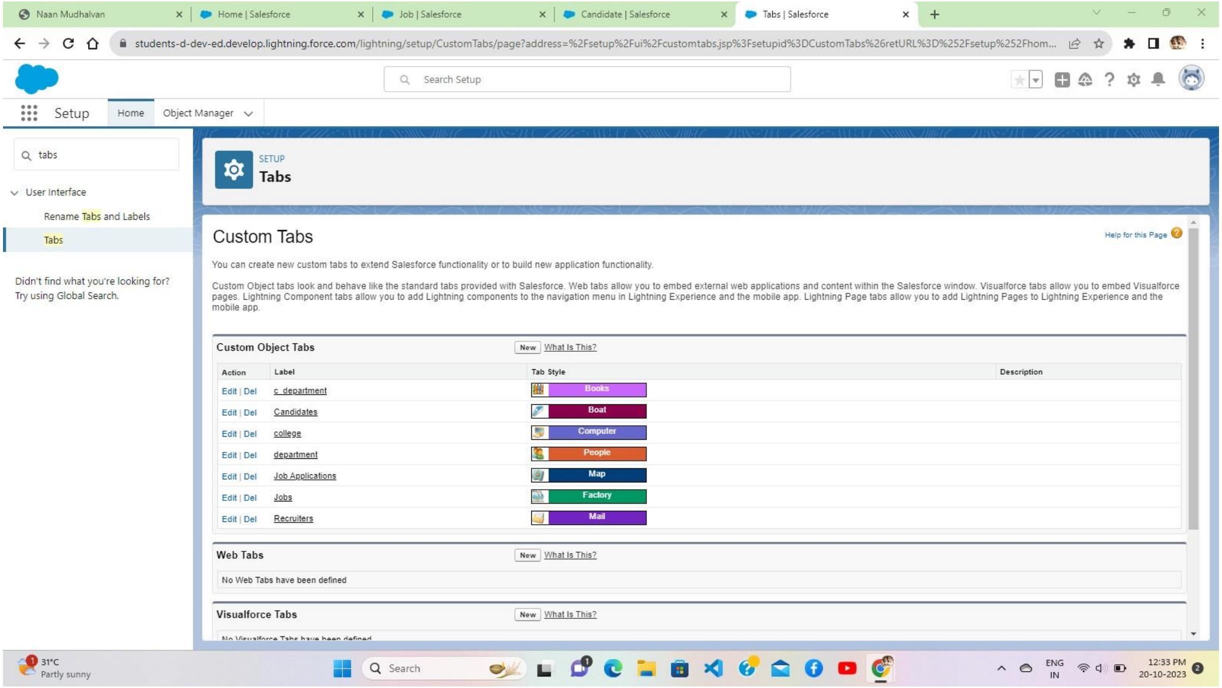
1. **Standard Object Tabs:** Standard object tabs display data related to standard objects.
2. **Custom Object Tabs:** Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.
3. **Web Tabs:** Web Tabs display any external Web-based application or Web page in a Salesforce tab.
4. **Visualforce Tabs:** Visualforce Tabs display data from a Visualforce Page.

1) Creation of Recruiter Tab

1. Now create a custom tab.
2. Click on Home tab, enter Tabs in Quick Find and select Tabs.

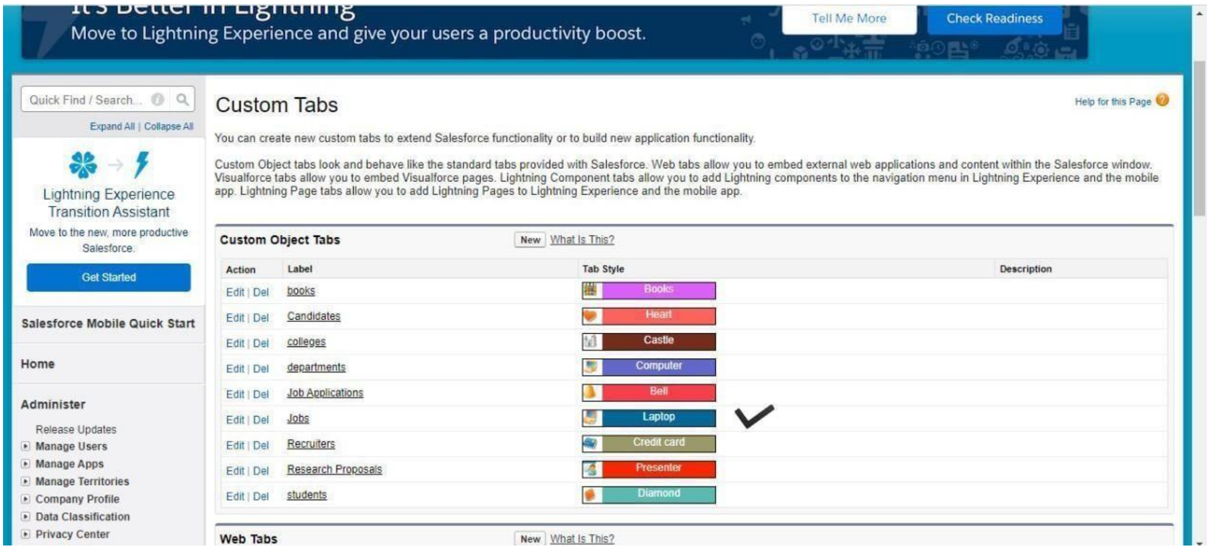
Under custom object tabs, click New

3. For Object, select Recruiter.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.



2) Creation of Job Tab

1. Now create a custom tab.
2. Click on Home tab, enter Tabs in Quick Find and select Tabs.
3. Under custom object tabs, click New.
4. For Object, select Job.
5. For Tab Style, select any icon.
6. Leave all defaults as is. Click Next, Next, and Save



3)Creation of Job Tab

1.Now create a custom tab.

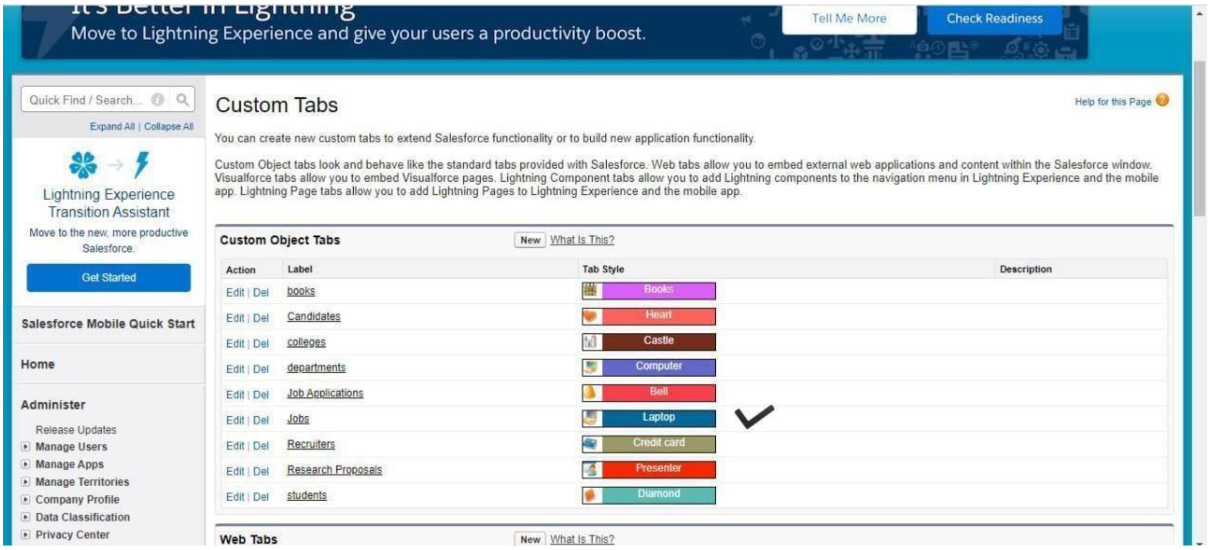
2.Click on Home tab, enter Tabs in Quick Find and select Tabs.

3.Under custom object tabs, click New.

4.For Object, select Job.

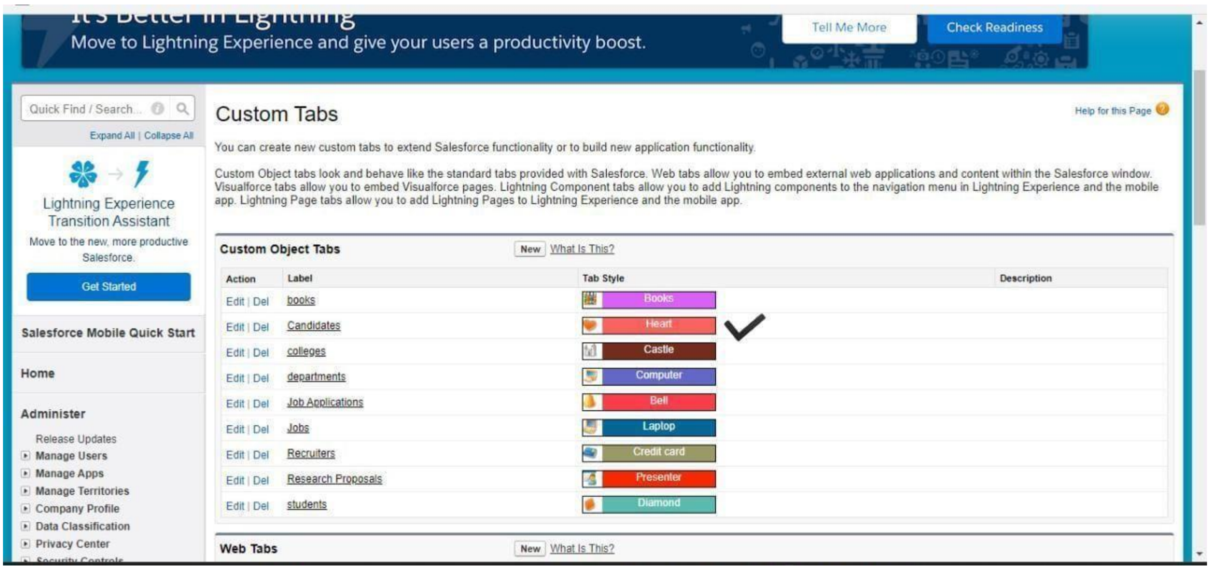
5.For Tab Style, select any icon.

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



4) Creation of Candidate Tab

1. Now create a custom tab.
2. Click on Home tab, enter Tabs in Quick Find and select Tabs.
3. Under custom object tabs, click New.
4. For Object, select Candidate.
5. For Tab Style, select any icon.
6. Leave all defaults as is. Click Next, Next, and Save



5) Creation of Job Application Tab

1.Now create a custom tab.

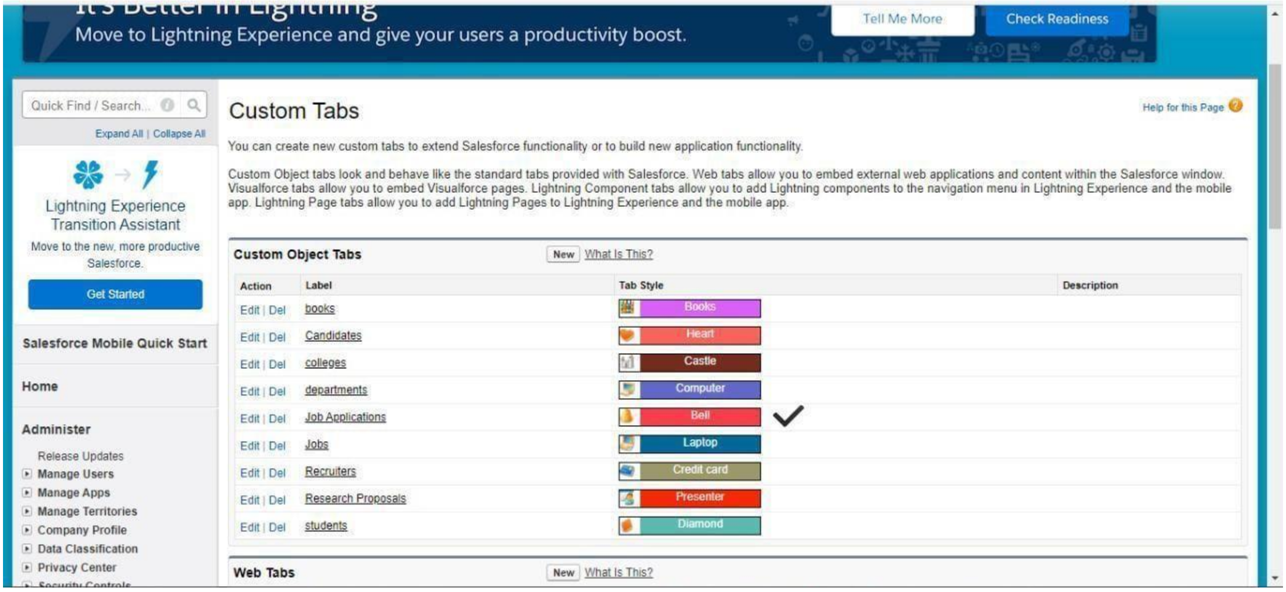
2.Click on Home tab, enter Tabs in Quick Find and select Tabs.

3.Under custom object tabs, click New.

4.For Object, select Job Application.

5.For Tab Style, select any icon.

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



Move to Lightning Experience and give your users a productivity boost.
Tell Me More
Check Readiness
Quick Find / Search...
Expand All | Collapse All
Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
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.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del books Books
Edit | Del Candidates Heart
Edit | Del colleges Castle
Edit | Del departments Computer
Edit | Del Job Applications Bell
Edit | Del Jobs Laptop
Edit | Del Recruiters Credit card
Edit | Del Research Proposals Presenter
Edit | Del students Diamond
Web Tabs
New
What Is This?

CHAPTER - 5

LIGHTNING APP:

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

Custom apps: these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

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

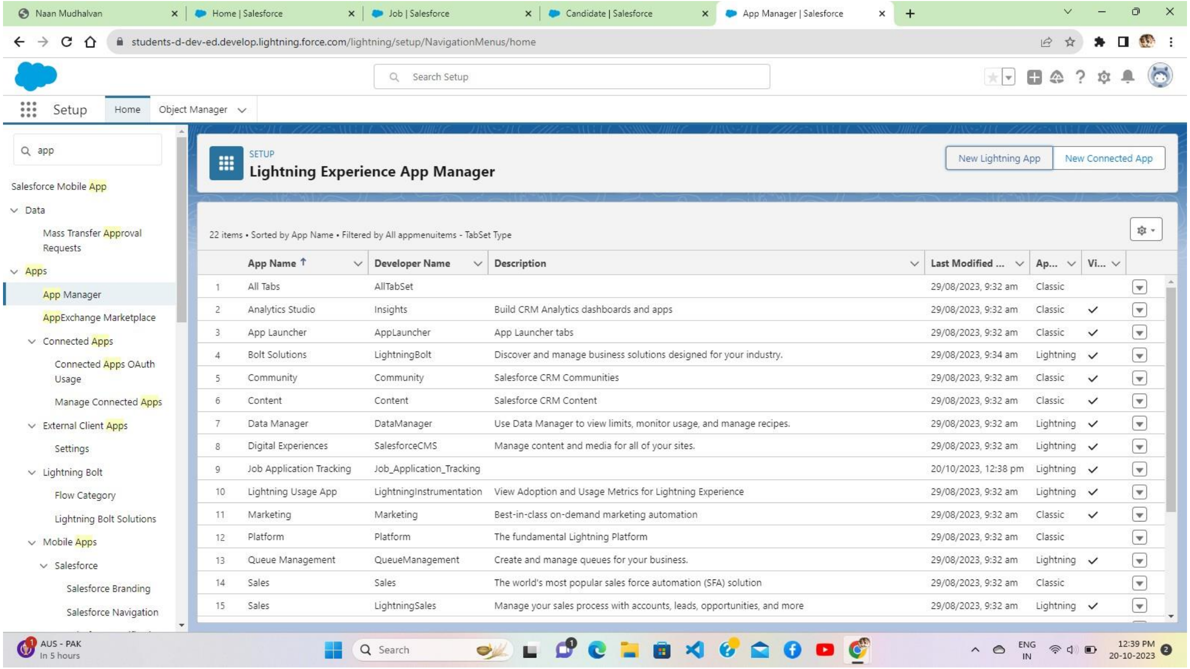
2. Under App Options, leave the default selections and click Next.

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

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

5. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

6. To verify your changes, click the App Launcher, type Job Application and select the Job Application app.



CHAPTER - 6

FIELDS AND RELATIONSHIP:

Fields in Salesforce represent what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in salesforce:

Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standardobjects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.

Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

1) Creation of Fields for The Recruiter Objects

1. click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Recruiter.
4. Select Fields & Relationships from the left navigation, and click New

    --From the sidebar, click Fields & Relationships. Notice that there arealready some fields there. Those are the standard fields.

    --Click New to create a custom field.

5. Choose the data type as Auto number, click next

6. Enter field label (Recruiter Number), Display format RN- {0000} Starting number (1) and click next

7. Next, Next and Click save

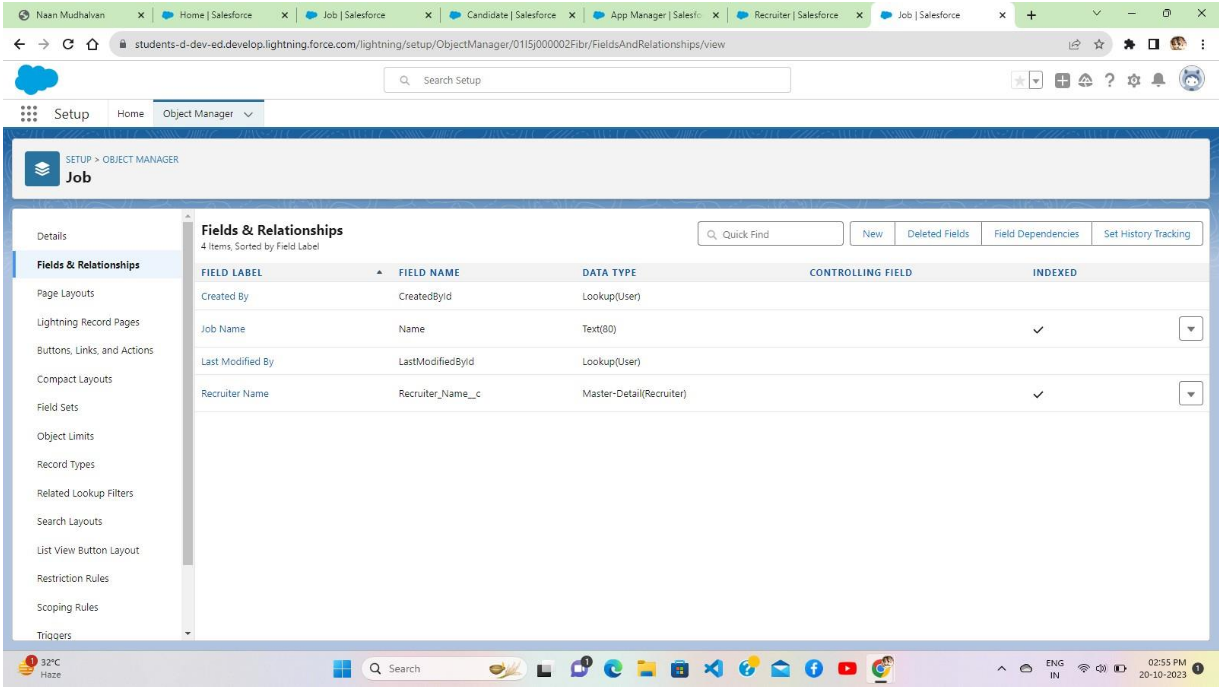
8. Now let's create the other fields follow above Activity1 steps 1 to 4 and we must choose the data types of the fields carefully

--Select the Text as the Data Type, then click Next. For Field Label, Job Title. Enter Length (20) Click Next, Next, then Save & New.

--Select the Email as the Data Type, then click Next. For Field Label, Email.

9. Click Next, Next, then Save & New.

--Select the phone as the Data Type, then click Next. For Field Label, Phone.

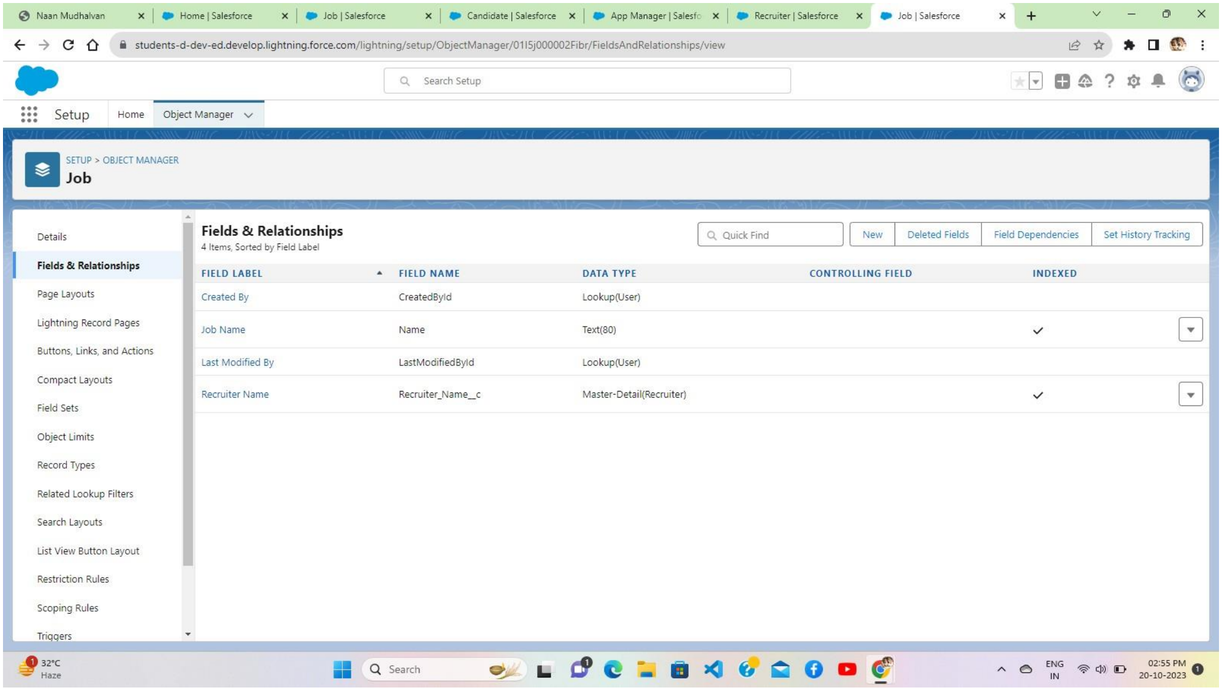


10. Click Next, Next, then Save & New.

2) Creation of Fields for The Job Objects

1.Select the Auto number as the Data Type, then click Next.

2.For Field Label, enter Job Application Id., Display format (J-{000}) starting number (001) Click Next, Next, then Save & New



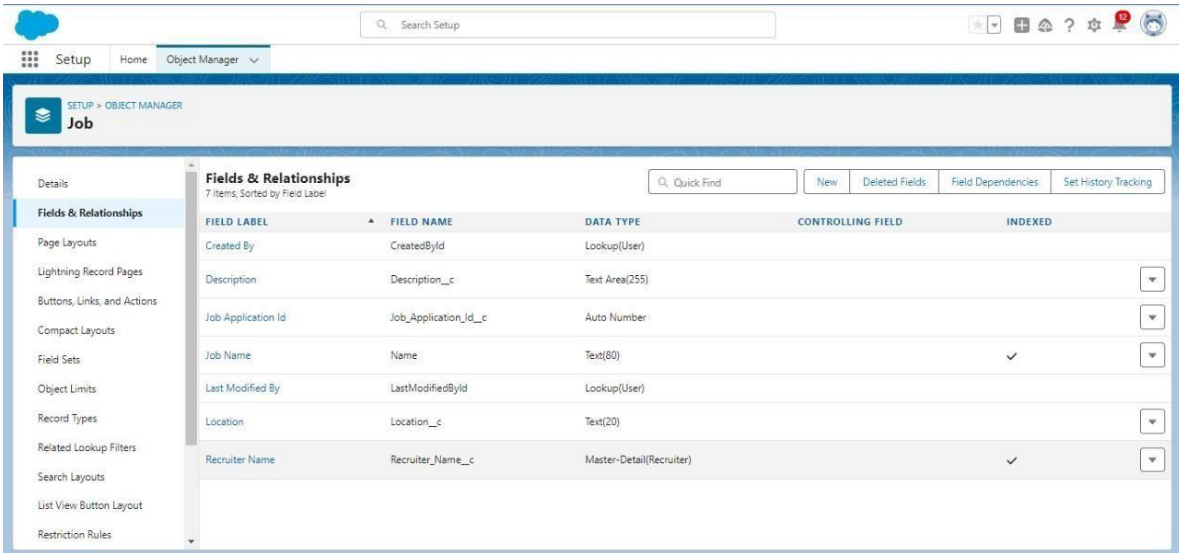
3.Select the Text area as the Data Type, then click Next. For FieldLabel, Description.

4.Click Next, Next, then Save & New.

5.Select the Text as the Data Type, then click Next. For Field Label,enter Location, and length (20) Click Next, Next, then Save & New

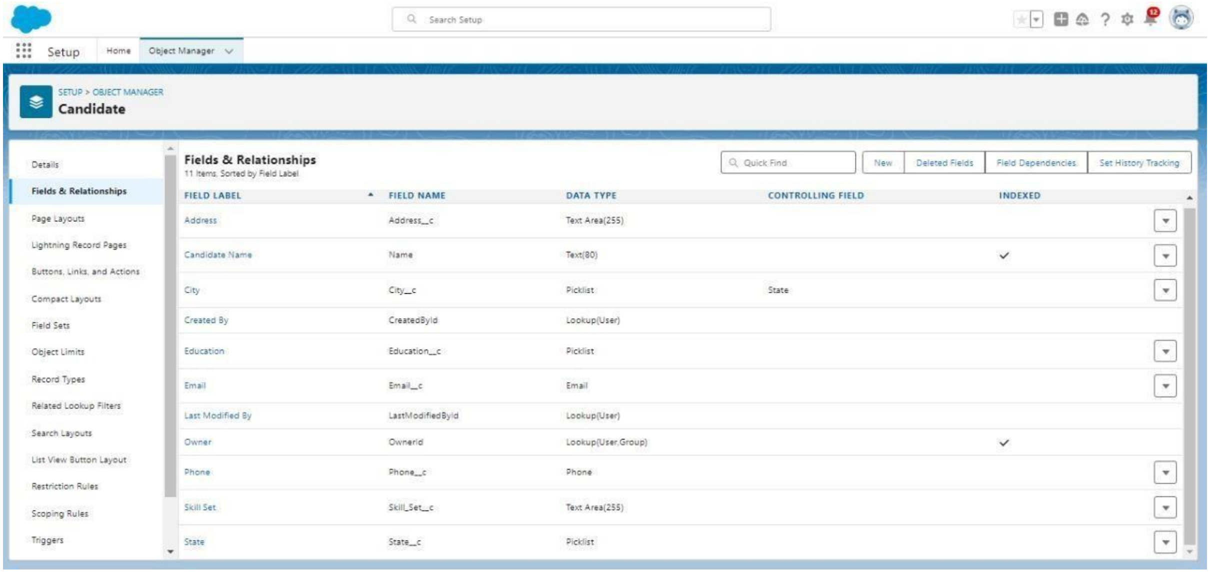
3) Creation of Master-Detail Relationship for Job Object

1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.
4. Choose Master-detail Relationship and click Next
5. Choose the related object (Recruiter) and select that object.
6. Enter the label name (Recruiter Name)



4) Creation of Fields for The Candidate Object

1. Select the Text area as the Data Type, then click Next. For Field Label, Address
2. Click Next, Next, then Save & New.
3. Select the Email as the Data Type, then click Next. For Field Label, enter Email.
4. Click Next, Next, then Save & New.
5. Select the Phone as the Data Type, then click Next. For Field Label, enter Phone.
6. Click Next, Next, then Save & New
7. Select Picklist as the Data Type and click Next. For Field Label enter Education.
8. Select Enter values, with each value separated by a new line and enter these values: Graduation,
9. Post-Graduation. Click Next, Next, then Save & New.
10. Select the Text area as the Data Type, then click Next. For Field Label, enter Skill Set.
11. Click Next, Next, then Save & New



5) Create Picklist Fields on Candidate Object

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

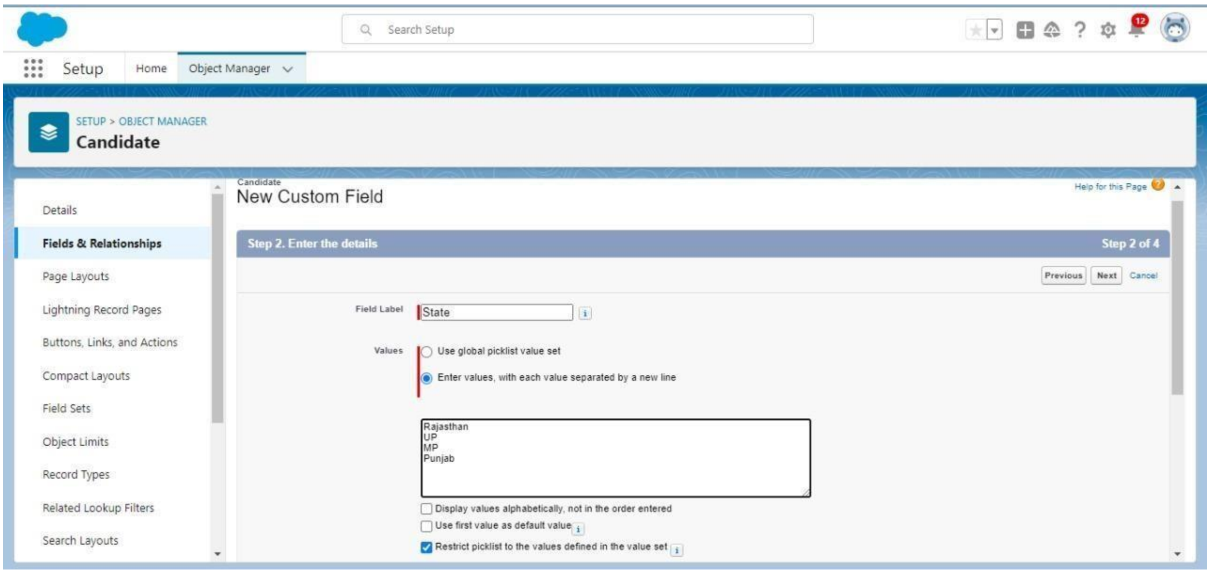
2.Click on the object manager tab just beside the home tab.

3.After the above steps, Select candidate Object

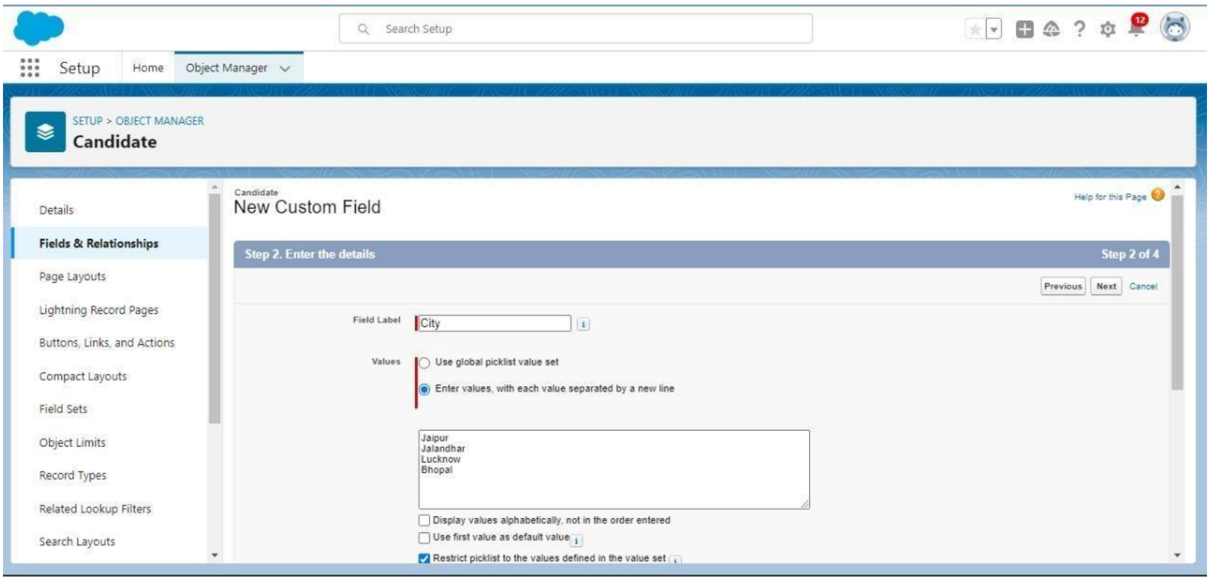
4.Now Select Fields and relationships from setup menu of the candidate object.

5.Click new and select Picklist fields next and enter label name (State) and select enter values option

6.(Rajasthan, UP, MP, Punjab), next, next and save.

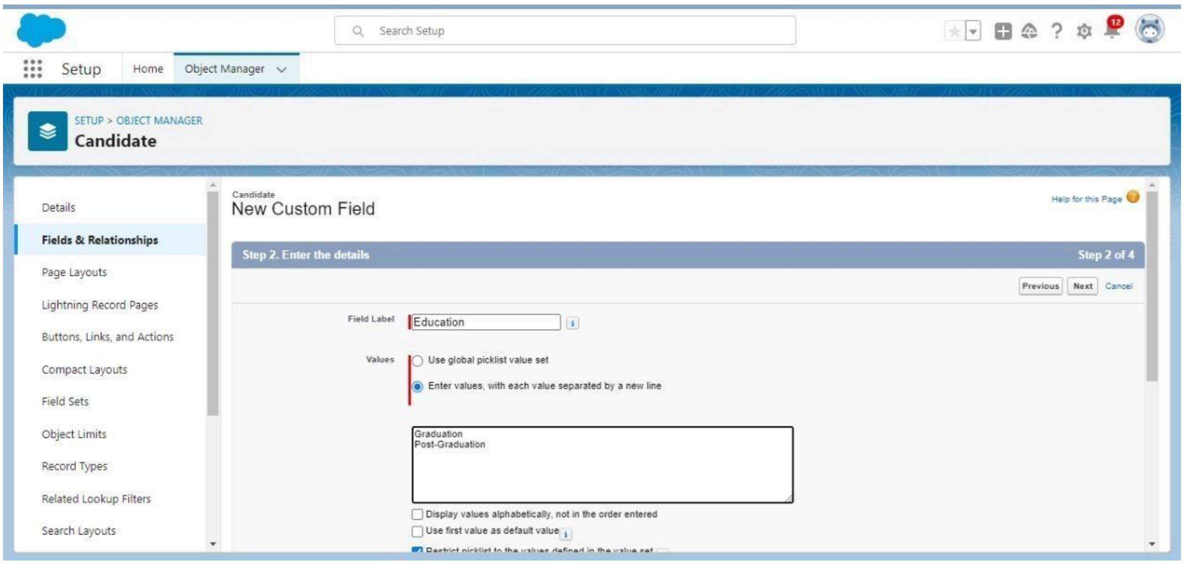


7.Select Picklist as the Data Type and click Next. For Field Label Name City and Select Enter values, with each value separated by anew line and enter these values (JS), next, next and Save.



8.Select Picklist as the Data Type and click Next. For Field Labelenter Education.

9.Select Enter values, with each value separated by a new line and enter these values: Graduation, Post-Graduation. Click Next, Next, then save and new.



6) **Create Field Dependency** (On Candidate Object)

1.Create a dependency between these two picklists, so that when a state is selected, only respective Values are available.

2.The below steps will assist you in creating Field Dependencies.

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

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

5.After the above steps, Select Candidate Object

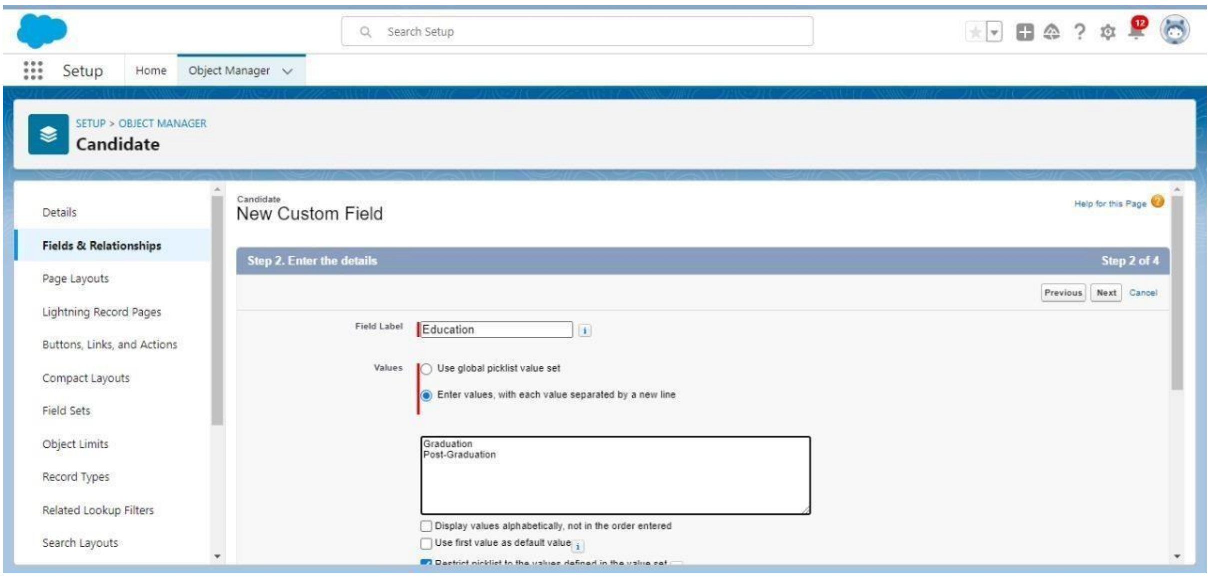
6.Now Select Fields and relationships from setup menu of the Candidate object.

7.Click Field Dependencies.

8.Click New.

9.Select State as the Controlling Field and select City as the Dependent Field.

10.Click Continue.



11.Select the appropriate Value in each column by double-clicking them. For Ex. Rajasthan – Jaipur.

12. Click Include Values. And it is also same for UP, MP& Punjab with its city.

13. Click Preview, then test the dependency by selecting different State and viewing the associate Values available for Particular state.

14. Click Close to close the preview window.

15. Click Save.

7) Create Field Dependency (On Candidate Object)

1. Create a dependency between these two picklists, so that when a state is selected, only respective Values are available.

2. The below steps will assist you in creating Field Dependencies.

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

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

5. After the above steps, Select Candidate Object

6. Now Select Fields and relationships from setup menu of the Candidate object.

7. Click Field Dependencies.

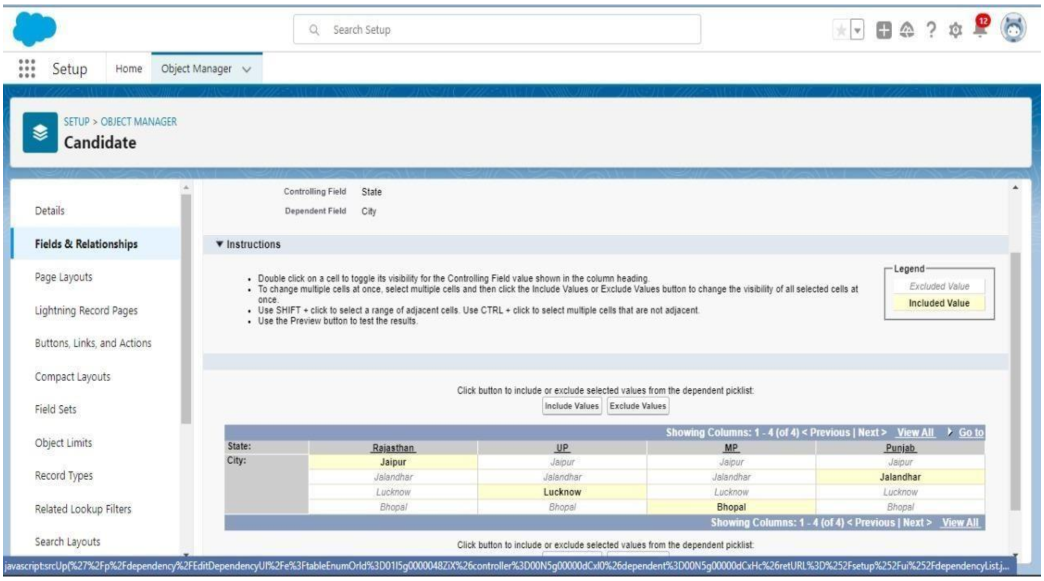
8. Click New.

8. Select State as the Controlling Field and select City as the Dependent Field.

9. Click Continue.

10. Select the appropriate Value in each column by double-clicking them. For Ex. Rajasthan - Jaipur

11. Click Include Values. And it is also same for UP, MP& Punjab with its city.



12. Click Preview, then test the dependency by selecting different State and viewing the associate Values available for Particular state.

13. Click Close to close the preview window.

14. Click Save.

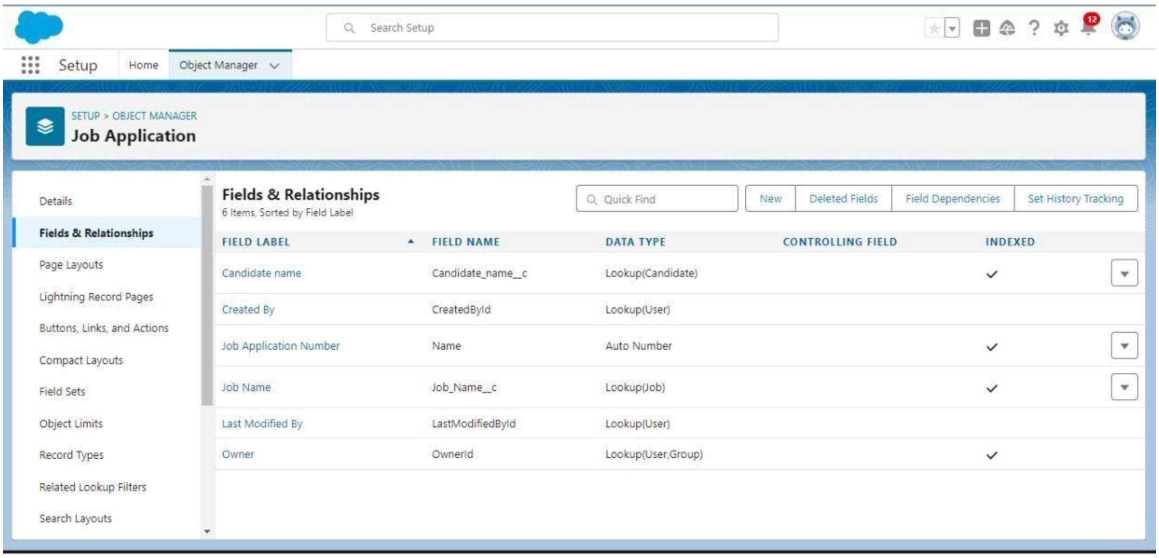
8) Creation Lookup Relationship for The Job Application Objects

Let's create two lookup relationship on job application object First lookup relationship

1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Select Lookup relationship & click next
4. Choose the related object as Candidate & click next
5. Give the field label (Candidate name) & click next, next, next andSave

Second lookup relationship

1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Select Lookup relationship & click next
4. Choose the related object as Job & click next
5. Give the field label (Job Name) & click next, next, next and Save



CHAPTER - 7

Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. A profile can be assigned to many users, but user can be assigned single profile at a time.

1)Create A Custom Profile

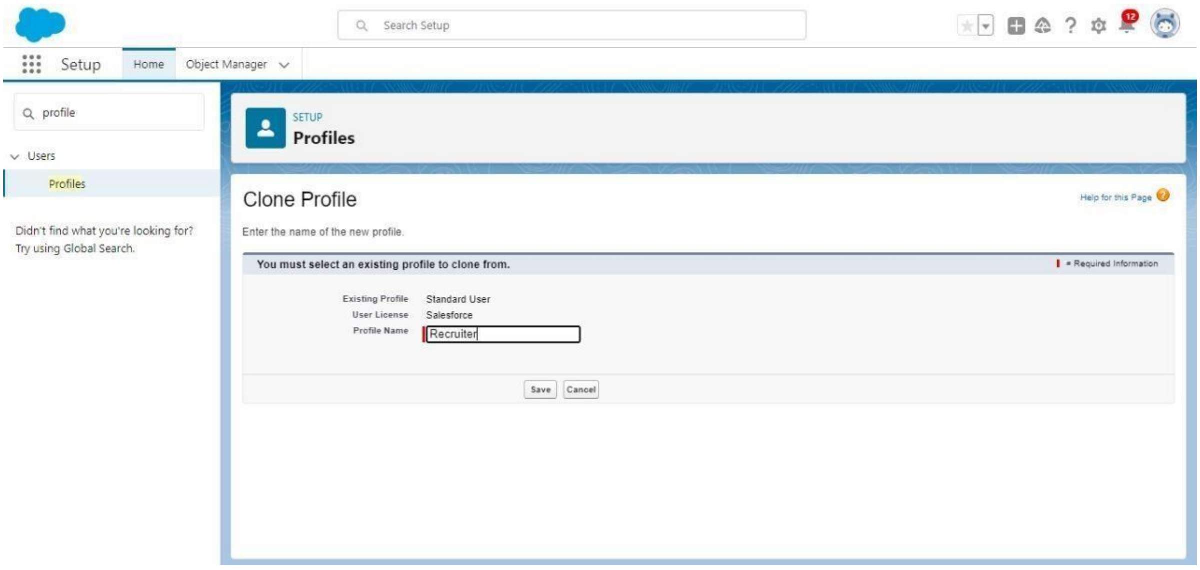
1.From setup, enter profiles in Quick Find box

2.Select profiles (Standard user).

3.Click clone.

4.For Profile, enter Recruiter.

5.Click save.



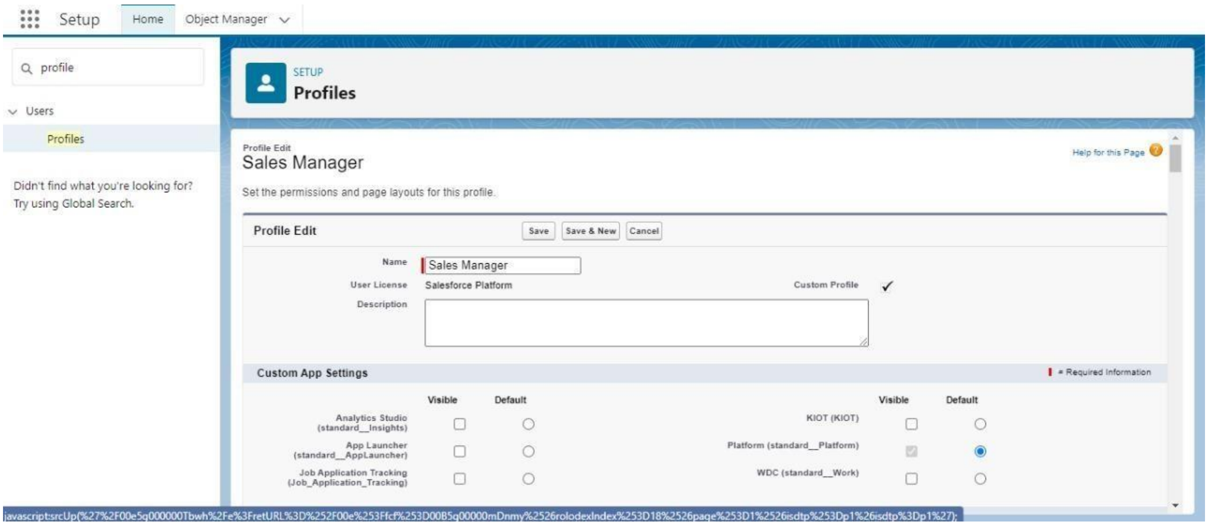
2)Create A Custom Profile-2

1.Create a profile with the profile name as “Sales Manager”.

2.From setup, enter profiles in Quick Find box

3.Select profiles (Standard user).

4.Click clone.



Role

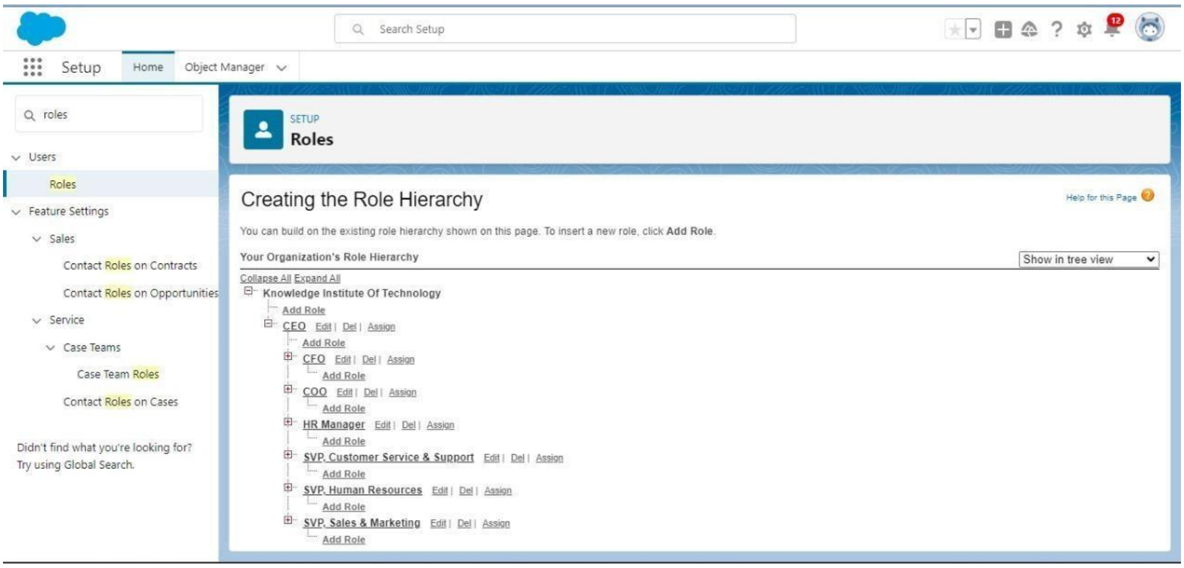
In Salesforce, roles are used to determine which users have access to certain data and functions within the system. They are also used to define the reporting hierarchy within an organization. Users with higher roles have greater access to data and more control over the system

1)Creation of Role

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

2.select the set-up roles option

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



CHAPTER - 8

User:

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforcehas a user account. The user account identifies the user, and the useraccount settings determine what features and records the user can access.

1)To Create A User

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

2.Click New User.

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

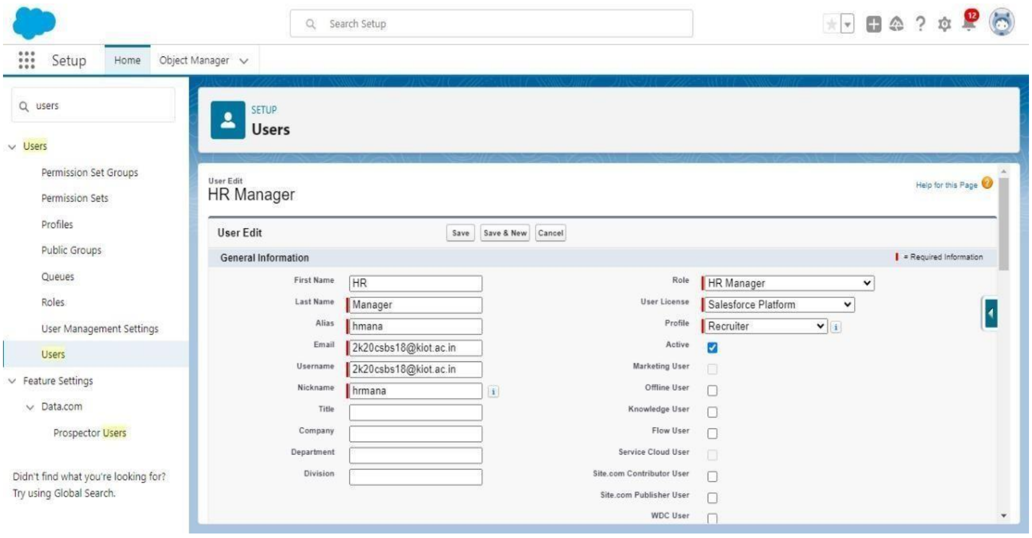
4.Enter the user’s name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.

5.Then create a new role HR Manager.

6.Select user License as Standard Platform User

7.Select profile (Recruiter)

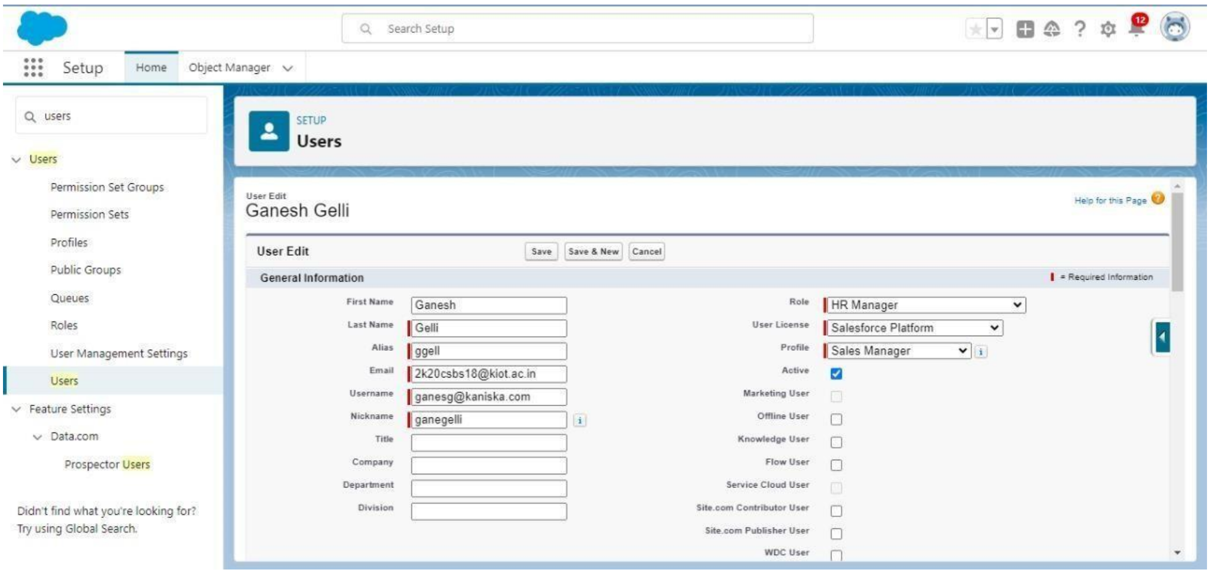
8.Click save



2) To Create A User

1. From Setup, enter Users in the Quick Find box, then select Users.
2. .Click New User
3. Enter First name as Ganesh and last name as Gili.
4. Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same asthe email address.
5. Then create a new role HR Manager.
6. Select user License as Standard Platform User.
7. Select profile (Sales Manager).

8.Click save



Sharing Rules

Sharing rules help users to share records based on conditions. Itis basically created for objects whose organization-wide defaults (OWD) are set to public read-only or private because sharing rules can only extend the access and not restrict it.

Types of sharing rules,

1.Owner-based Sharing Rules

2.Criteria-based Sharing Rules

1) Create A Sharing Rule

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

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

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

4. Select your rule type based on the criteria.

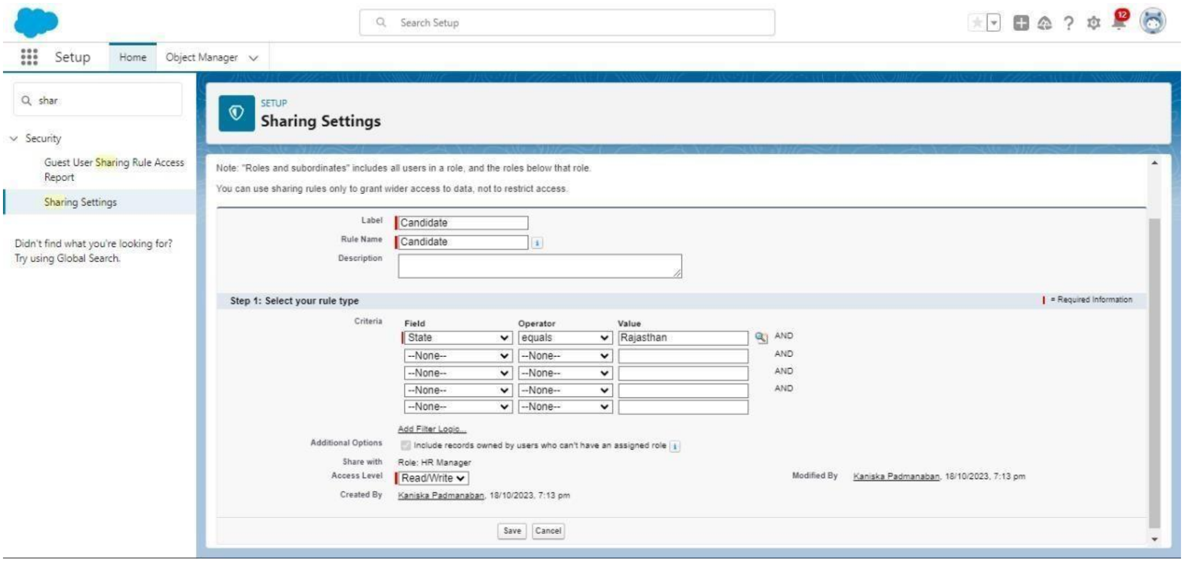
5. Select the field can join immediately check field from the candidate object.

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

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

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

9. And save the rule.

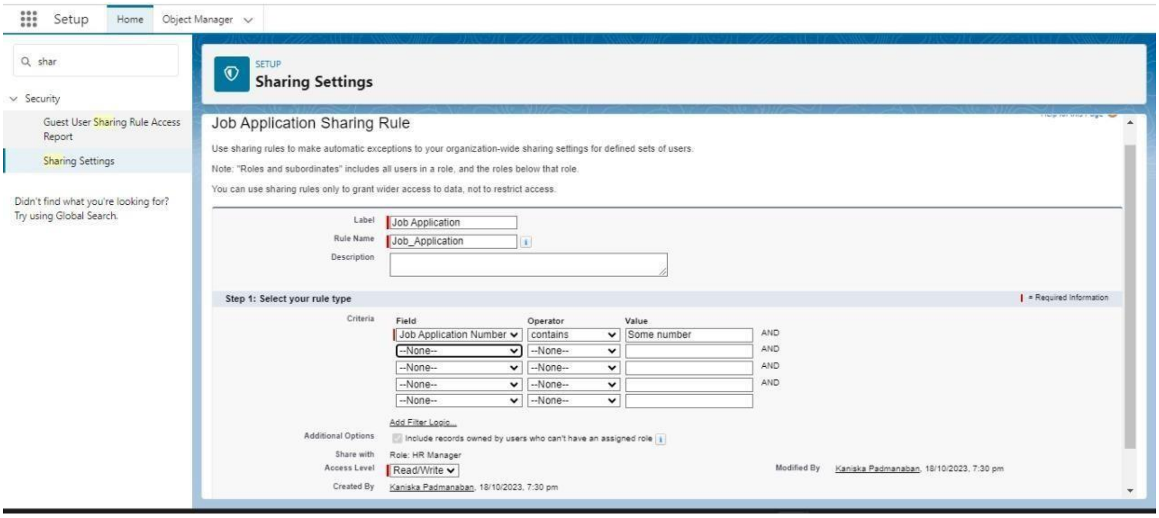


2) Activity 2

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

Create A Sharing Rule

1. Go to Sharing Settings, which can be found under the Quick Find section.
2. Scroll down and find the Job Application object where a sharing rule needs to be added, and then click on New to create a new sharingrule.
3. Add the label of the sharing rule you want to make.
4. Select your rule type based on the criteria.
5. Select the field can join immediately check field from the Job Application object.
6. Job application number contains some number.
7. And in selecting the users to share with the section select roles andin that select Hr Manager.
8. And in the section of select the level of access for the users give theaccess Read/Write.
9. And save the rule


Setup
Home
Object Manager
shar
Security
Guest User Sharing Rule Access Report
Sharing Settings
Didn't find what you're looking for? Try using Global Search.
SETUP
Sharing Settings
Job Application Sharing Rule
Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.
Note: "Roles and subordinates" includes all users in a role, and the roles below that role.
You can use sharing rules only to grant wider access to data, not to restrict access.
Label
Job Application
Rule Name
Job_Application
Description
Step 1: Select your rule type
= Required Information
Criteria
Field
Operator
Value
Job Application Number
contains
Some number
AND
--None--
Add Filter Logic...
Additional Options
Include records owned by users who can't have an assigned role
Share with
Role: HR Manager
Access Level
Read/Write
Modified By
Kaniska Padmanaban, 18/10/2023, 7:30 pm
Created By
Kaniska Padmanaban, 18/10/2023, 7:30 pm

CHAPTER - 10

FLOWS:

Flows in Salesforce, a flow is a tool that automates complexbusiness processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows. Flow Builder can be used to build code-like logic without using a programming language. Flows fallinto five categories:

1. Screen Flows
2. Schedule-Triggered Flows
3. Autolaunched Flows
4. Record-Triggered Flows
5. Platform Event-Triggered Flows

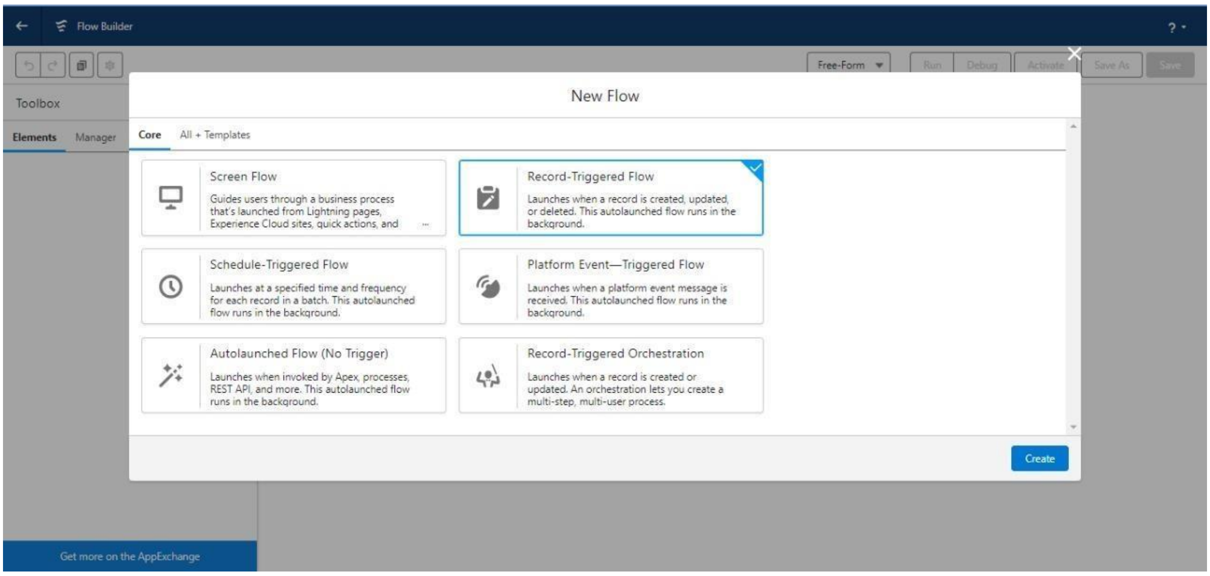
1)Create A Record Trigger Flow on Job Object

1.Click on Gear icon and select setup

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

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

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



5. Add an element called Get record.

6. Label name as Recruiter Records.

7. Select the object as Recruiter.

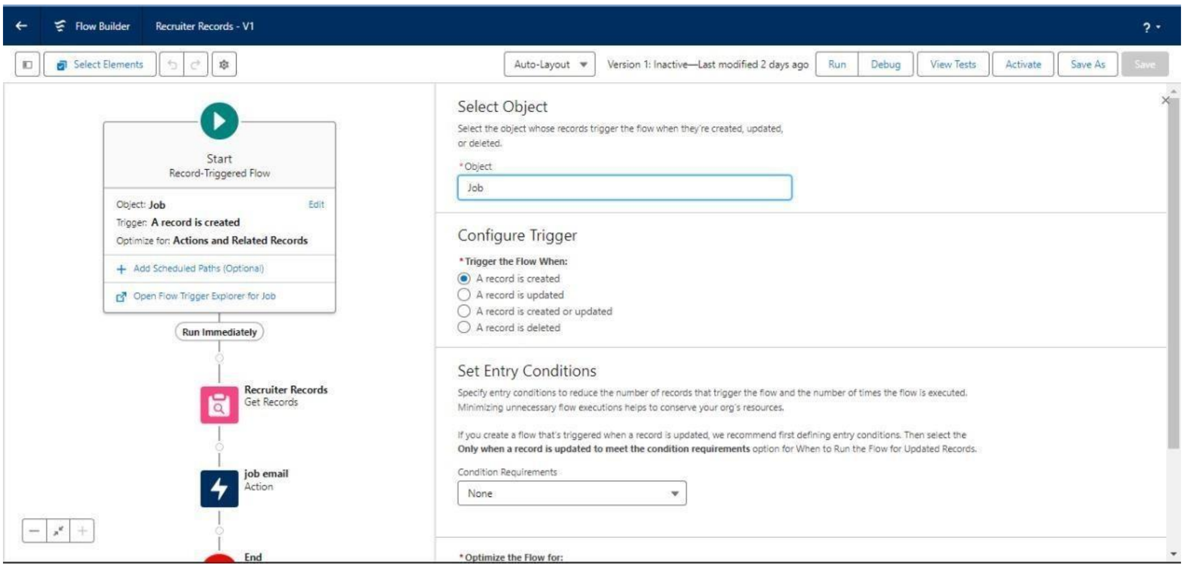
8. After entering the object follow the steps.

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

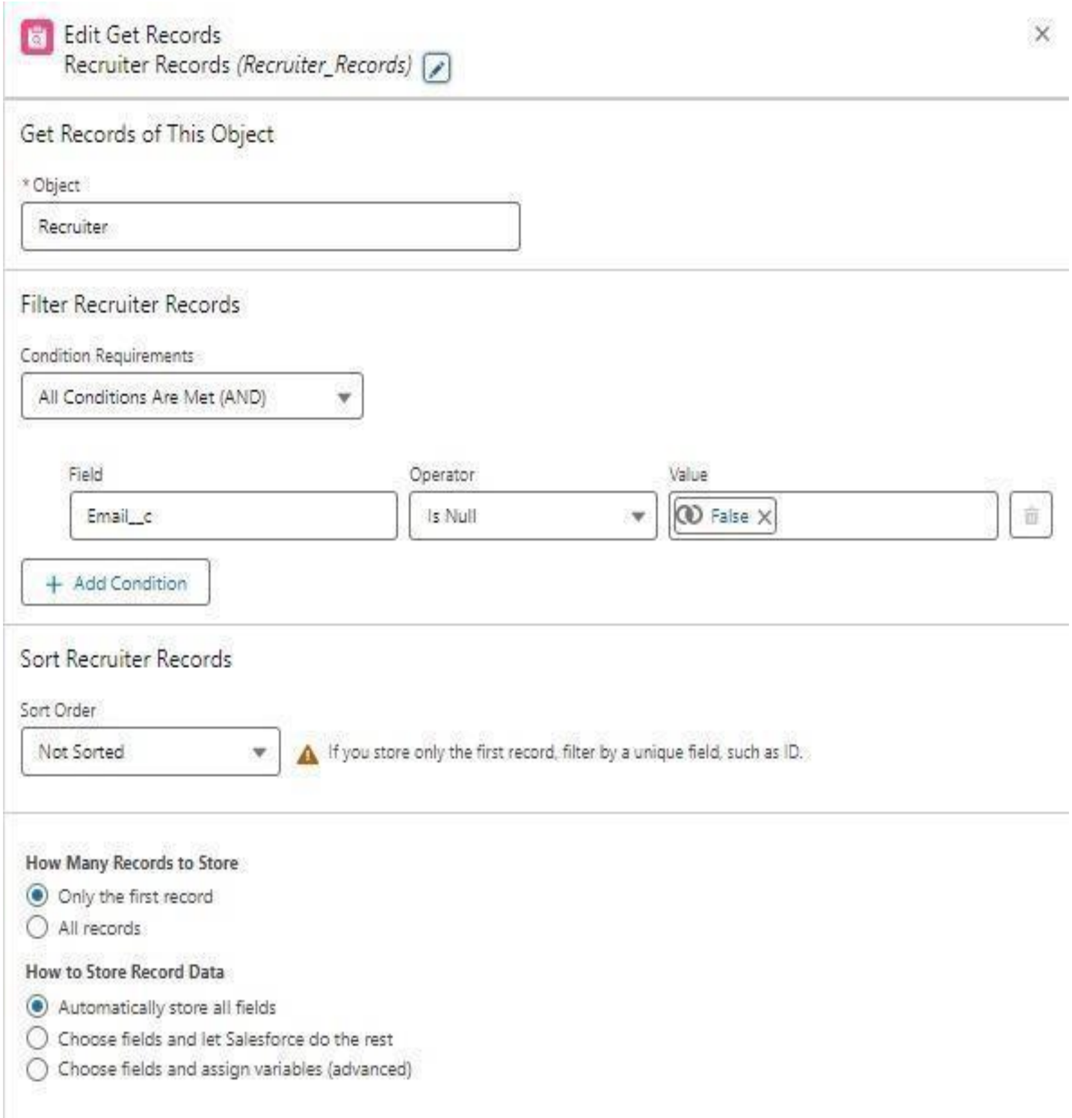
11. Select the field as Recruiter_Email__c.

12. Operation should be Is Null.

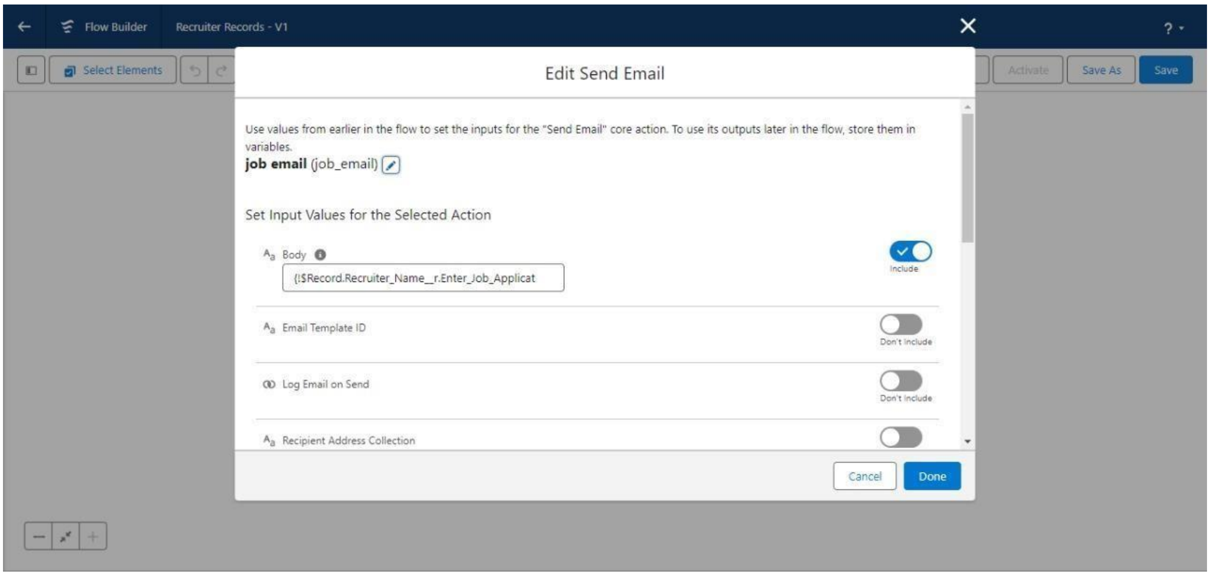
13. Value should be False. And click done.


Flow Builder
Recruiter Records - V1
Select Elements
Auto-Layout
Version 1: Inactive—Last modified 2 days ago
Run
Debug
View Tests
Activate
Save As
Save
Start
Record-Triggered Flow
Object: Job
Edit
Trigger: A record is created
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Job
Run Immediately
Recruiter Records
Get Records
job email
Action
End
Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
*Object
Job
Configure Trigger
*Trigger the Flow When:
A record is created
A record is updated
A record is created or updated
A record is deleted
Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the Only when a record is updated to meet the condition requirements option for When to Run the Flow for Updated Records.
Condition Requirements
None
*Optimize the Flow for:

14. Add another element called Action.
15. Click on the Action and start creating new action
16. Select the action as Send Email.
17. Enter the label name job email, API name is auto populated.
18. Set input values as
    a. Body: {!$Record.Name} with {!$Record.Job_Application_Id___c} is available. Please find the suitable candidates for the position.
    b. Subject: {!$Record.Name}
19. Recipient Email Addresses (comma-separated) should be includedfor that turn it on.
20. Recipient Email Addresses:
    {!$Record.Recruiter_Name__r.Recruiter_Email____c}
21. Click on done.
22. After the completion of flow, check whether the flow is running and click save.
23. And Activate the flow.



Edit Get Records
Recruiter Records (Recruiter_Records)
Get Records of This Object
* Object
Recruiter
Filter Recruiter Records
Condition Requirements
All Conditions Are Met (AND)
Field
Operator
Value
Email__c
Is Null
False
Add Condition
Sort Recruiter Records
Sort Order
Not Sorted
If you store only the first record, filter by a unique field, such as ID.
How Many Records to Store
Only the first record
All records
How to Store Record Data
Automatically store all fields
Choose fields and let Salesforce do the rest
Choose fields and assign variables (advanced)



2)Create Another Flow

1.Click on Gear icon and select setup

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

3.Click on New flow and Select Screen Flows.

4.Add an element called screen.

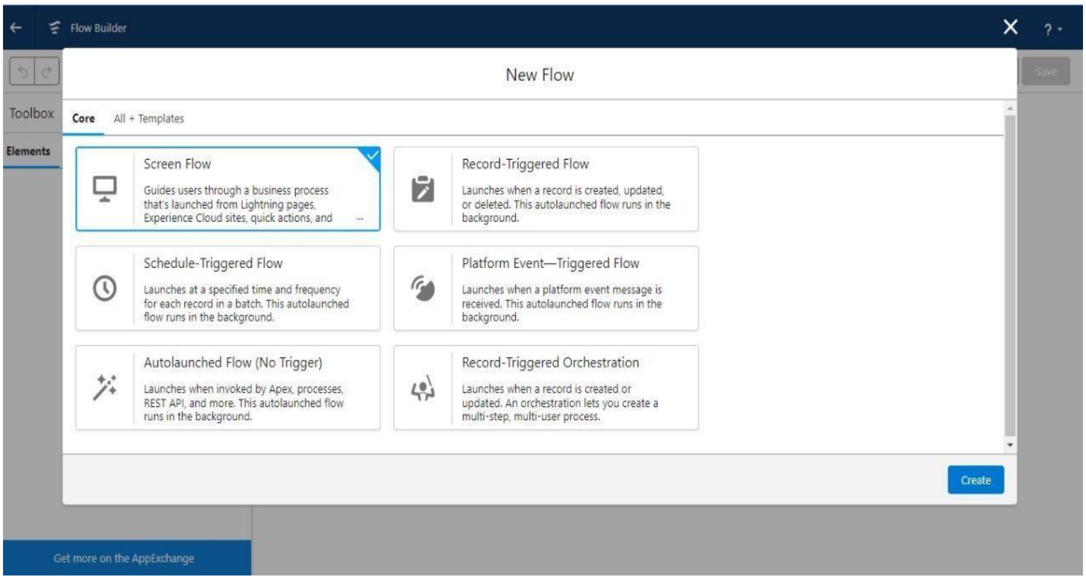
5.Screen label should be Candidate details.

6.API name is auto populated.

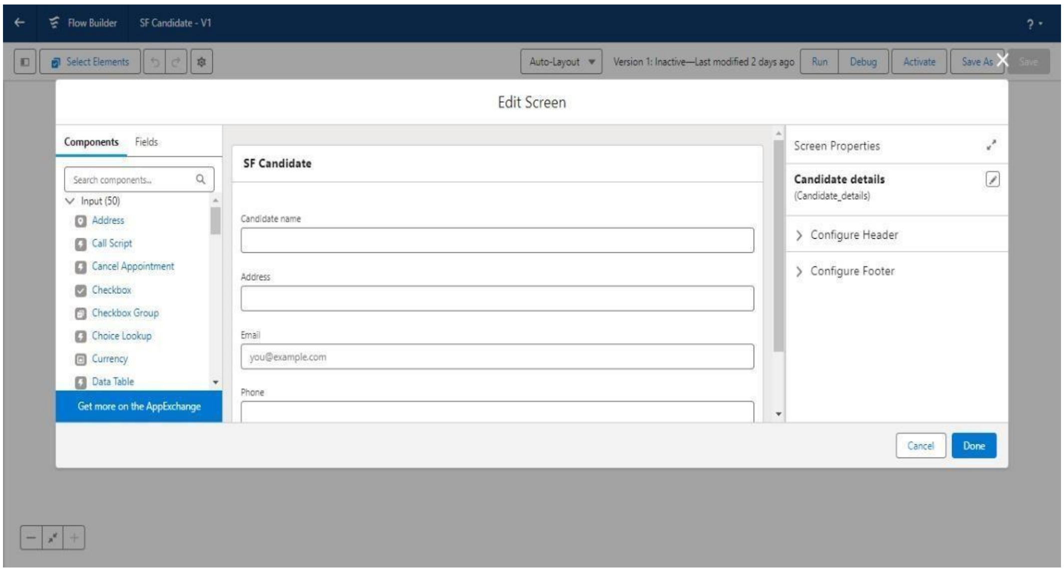
7.Add the components in canvas

8.Select the text from the components.

9.Label name as Candidate name.



10. API name is auto populated.
11. Select the text area from the components.
12. Label name as Address.
13. API name is auto populated.
14. Select the email from the components.
15. Label name as Email.
16. API name is auto populated.
17. Select the Phone from the components.
18. Label name as Phone.
19. API name is auto populated.
20. Select the picklist from the components.



21. Label name as Education.

22. API name is auto populated.

23. And select the choice as {!pick}.

24. Add a header to the canvas candidate flow for job application.

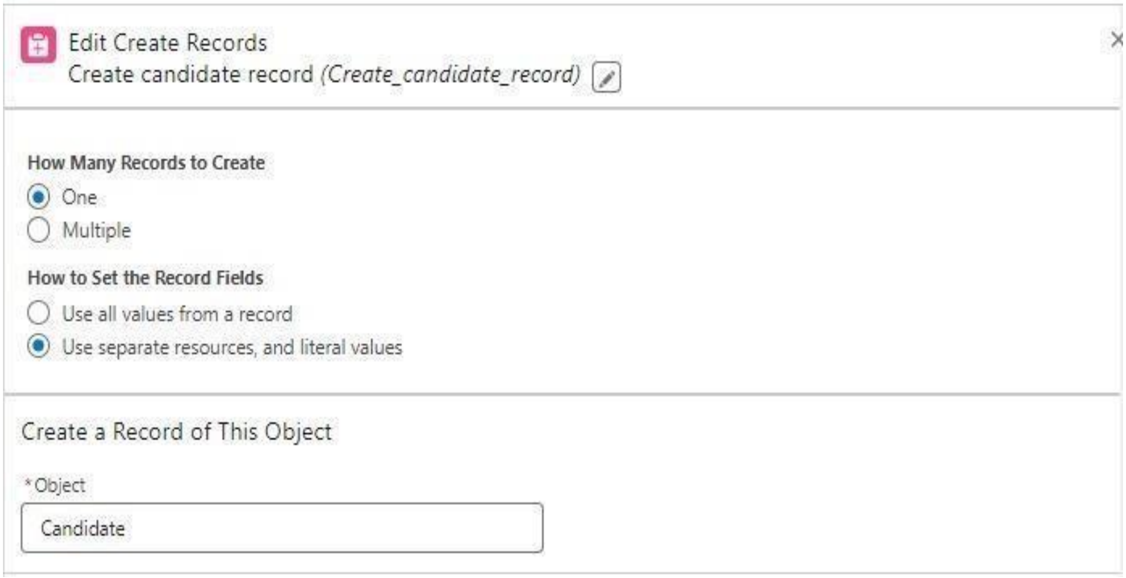
25. Click on save.

26. Next, add another element called create record.

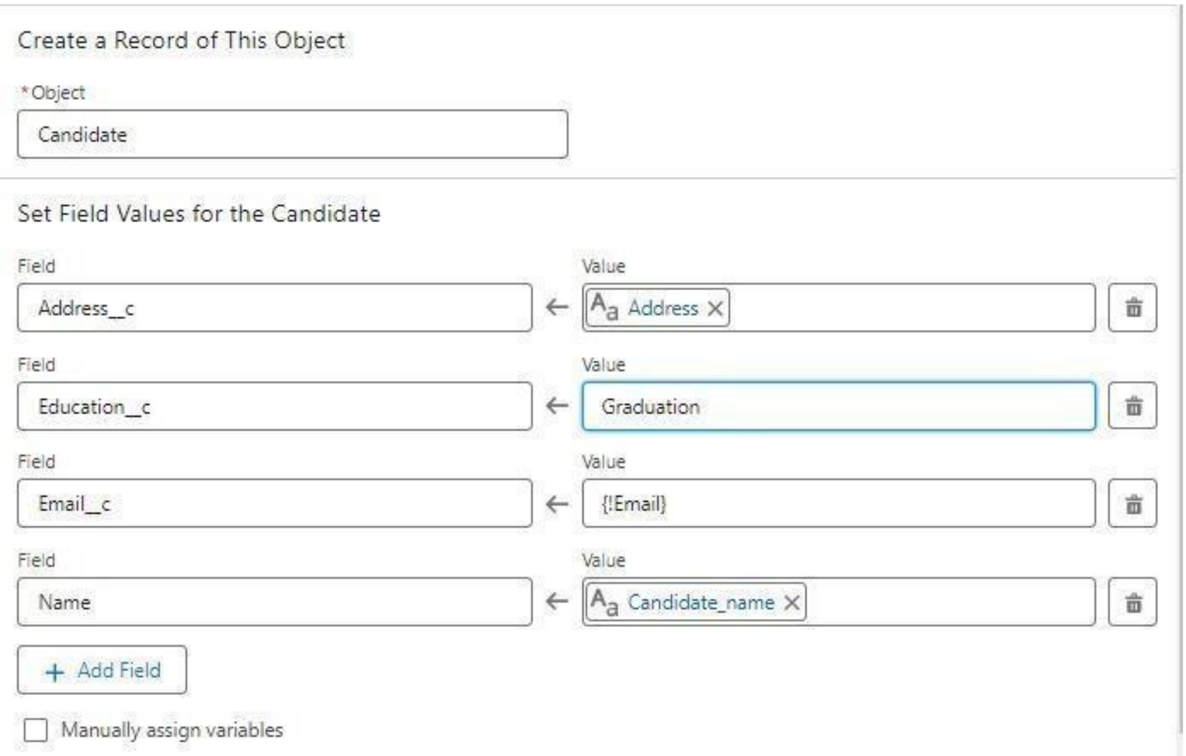
27. Label name should be Create candidate record.

28. API is auto populated. and change the How to Set the Record Fields to Use separate resources, and literal values.

29. Select the object Candidate1.



30. Set the values for the candidate1 as
31. Field is Address__c and value should be {!Address}.
32. Field is Education_c and value should be {!Education}.
33. Field is Email__c and value should be {!Email.value}.
34. Field is Name and value should be {!Candidate_name}.
35. After that click on done.
36. Run the flow and check whether the flow is working and click on save.
37. And activate the flow.


Create a Record of This Object
*Object
Candidate
Set Field Values for the Candidate
Field
Value
Address__c
Address
Field
Value
Education__c
Graduation
Field
Value
Email__c
{!Email}
Field
Value
Name
Candidate_name
Add Field
Manually assign variables

CHAPTER – 11

REPORTS & DASHBOARD

Reports:

A report is a list of records that meet the criteria you define. It's displayed in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder.
Folders can be public, hidden, or shared, and can be set to read-onlyor read/write.

1)Create A Report

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

2. Click on app launcher search for reports.

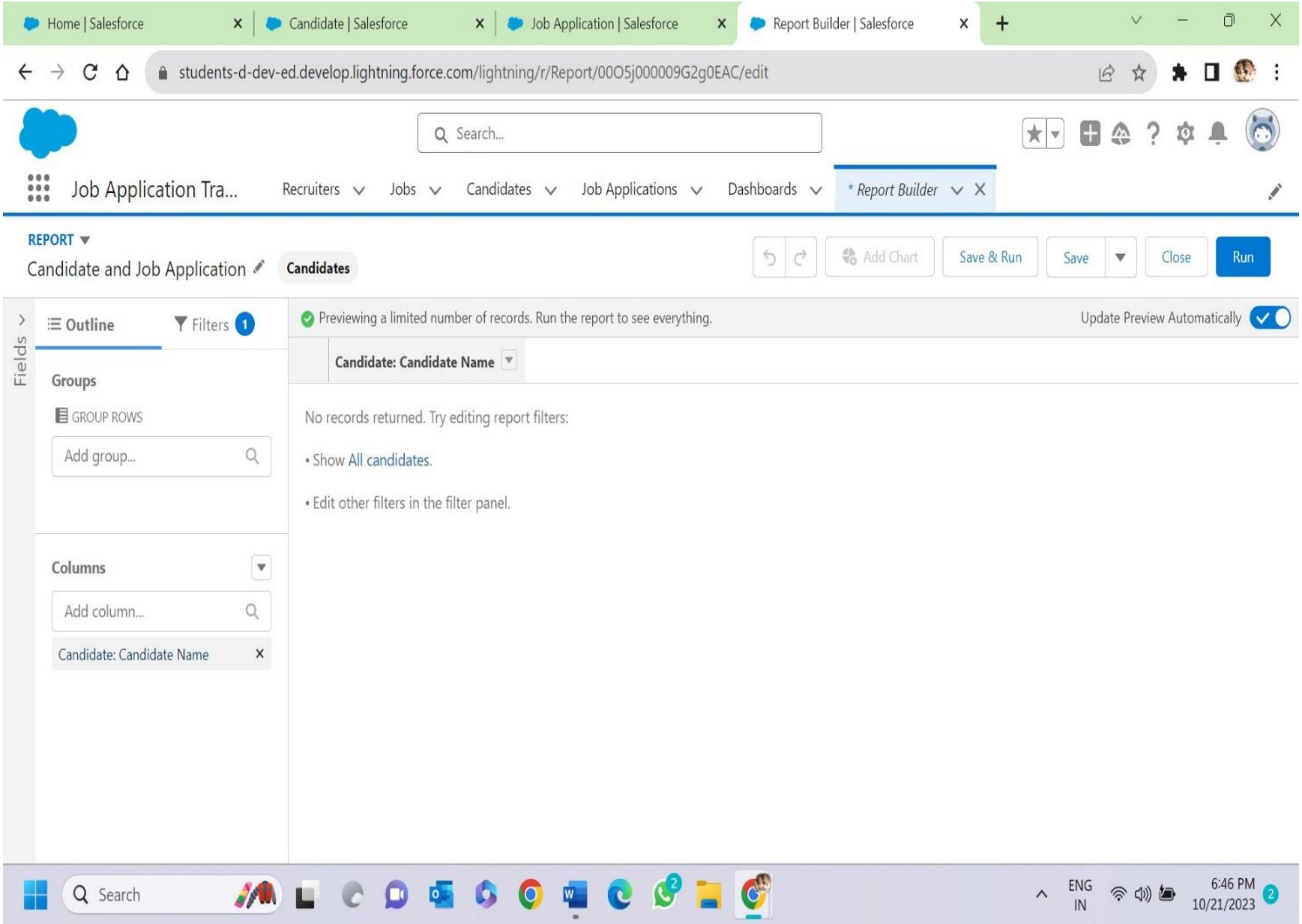
3. Click on the new report and select the category has job application with candidate name.

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

5. show me my job application and job application created date (All time)

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

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


Home | Salesforce
Candidate | Salesforce
Job Application | Salesforce
Report Builder | Salesforce
students-d-dev-ed.develop.lightning.force.com/lightning/r/Report/00O5j000009G2g0EAC/edit
Search...
Job Application Tra...
Recruiters
Jobs
Candidates
Job Applications
Dashboards
* Report Builder
REPORT
Candidate and Job Application
Candidates
Add Chart
Save & Run
Save
Close
Run
Fields
Outline
Filters 1
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Candidate: Candidate Name
Groups
GROUP ROWS
Add group...
No records returned. Try editing report filters:
• Show All candidates.
• Edit other filters in the filter panel.
Columns
Add column...
Candidate: Candidate Name
Search
ENG
IN
6:46 PM
10/21/2023

Dashboard

Dashboards provide more insights than reports as they combine the data from many reports and show a summarized result. Looking atmany reports at a time gives the flexibility of combining the results from them quickly. Also, summaries in dashboards help us decide on action plans quicker. The dashboards can contain charts, graphs and Tabular data.

1)Create A Dashboard

1.Click the Dashboards tab.

2.Click New Dashboard.

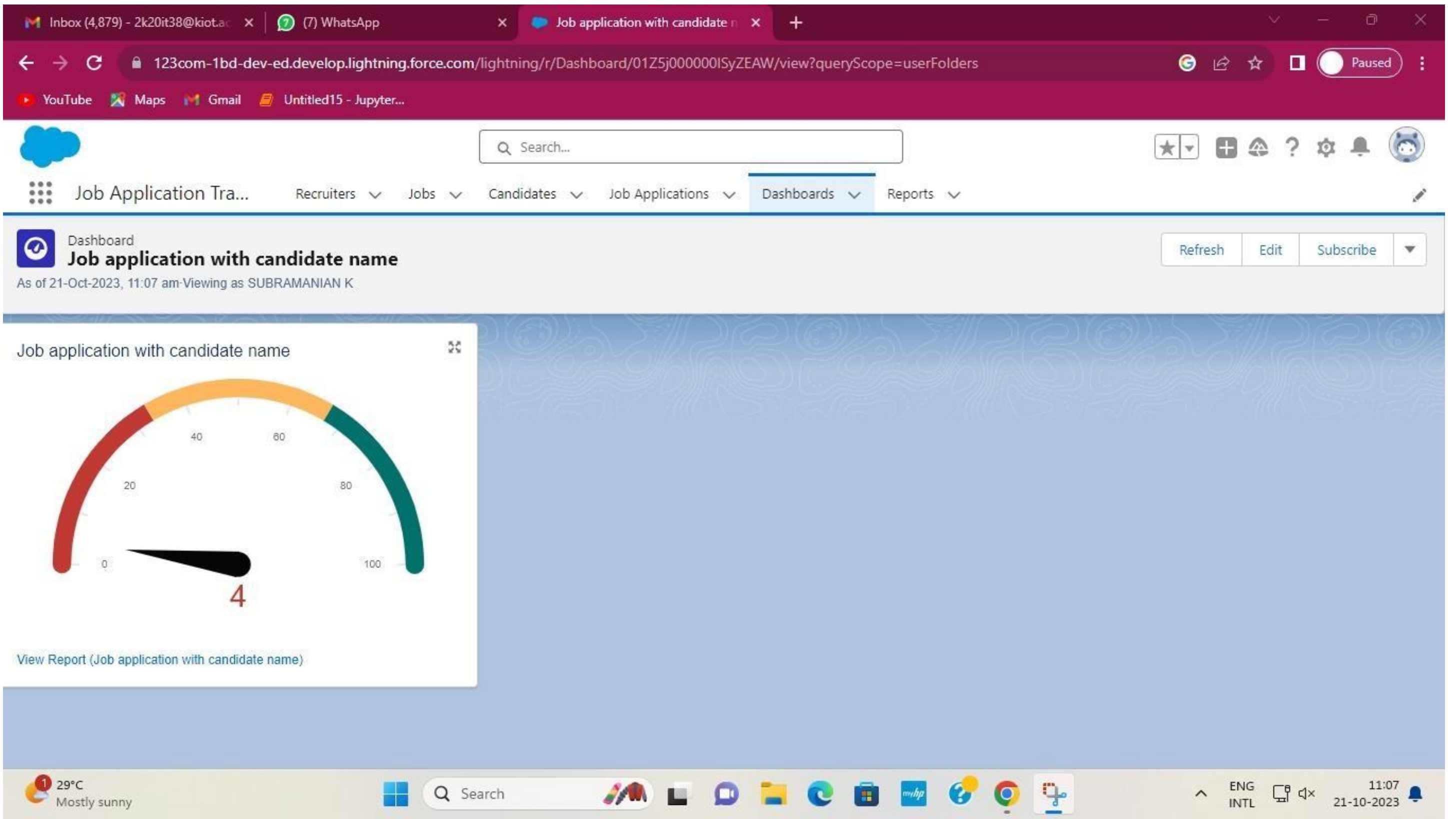
3.Name the dashboard Job application with candidate name and click Create.

4.Click +Component.

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

6.Select the Gauge chart and click Add.

7.Click Save and then Done.


Job application with candidate name
Dashboard
Job application with candidate name
As of 21-Oct-2023, 11:07 am·Viewing as SUBRAMANIAN K
Refresh
Edit
Subscribe
Job application with candidate name
4
View Report (Job application with candidate name)

CHAPTER – 12

GITHUB & PROJECT VIDEO DEMO LINK

GitHub: https://github.com/SUBRAMANIAN-K/naanmudhalvan-salesforce-NM2023TMID02228-kiot.git

Video Demo Link:
https://drive.google.com/file/d/1QufqpbYwoa9q913pkZVJDKCNe6GR8ar8/view?usp=drivesdk