

salesforce

ONLINE TRAININGS

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<https://www.facebook.com/groups/rnreddytechsupports>

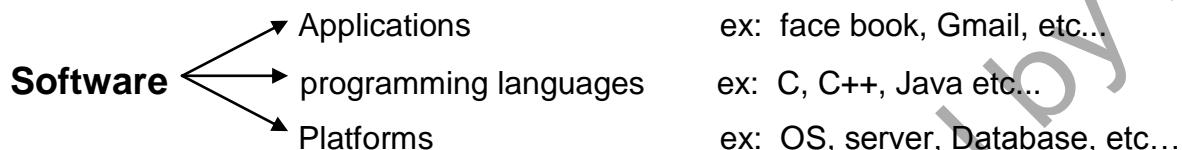
RN Reddy IT School

No Programming Background Required but Become Masters in Programming

Salesforce introduction

- Salesforce is a **cloud** based technology
- Salesforce was designed by **salesforce dot com [SFDC]** company to design the automated CRM applications, enterprise applications and web Applications
- Salesforce supports application development, application testing, application deployment and application integration

Software: Software is a collection of programs and it is categorized into different types.



CRM [Customer Relationship Management]

CRM is the word can find in the business firms (These are the small business units that will do business). Business firms are categorized into following three types

1. Small-scale business firm
2. Medium-scale business firm
3. Large-scale business firm

Note: For every business firm following three departments are available.

1. Marketing Dept
2. Sales Dept
3. Customer Dept (Customer Care)

1)Marketing Dept: This department will advertise about the products (Campaigning) to gather the customers.

2)Sales Dept: This Dept will take care about selling of products.

3)Customer Support Dept: This dept will give the back end support for the customers after selling the product so that customer can have some positive feedback on business firm and they can maintain relation with the company in future.

→ Combination of above services [marketing, sales and customer support] is known as CRM
→ **The main aim of CRM is to maintain the business relation between customer and business firms**

→ Salesforce is predefined platform used to design the CRM Apps that means it is used to design the application for the business firm to automate the CRM process. (Online marketing, online sales, online customer support with fully automation).

→ Mainly CRM Apps can be designed for the business firms and these applications can be used by employees of business firms (Enterprise users)

End-user is the person who will use general software like Gmail, face book, WhatsApp

Enterprise-User The person (company) who will use CRM application

→ Salesforce is very famous to design not only **CRM** application but also other required application for companies with fully automation like

- Recruiting Application
- Project Management Application
- Contacts Management Application
- Budget Management Application
- Inventory Management Application
- Report Management Application etc...

Cloud: [Generally Cloud is nothing but internet]

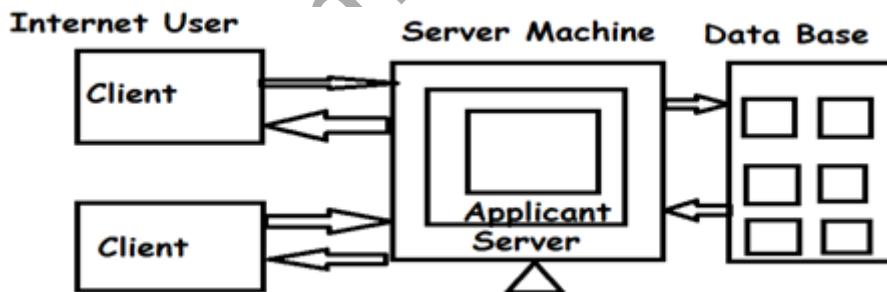
→ Inter connection of computers throughout the globe is known as internet, the main purpose of internet (Cloud) is to share the services of one computer to the other computers throughout the globe

Cloud Services: Cloud provides following three types of services

1. SaaS (Software as a Service)
2. PaaS (platform as a Service)
3. IaaS (Infrastructure as a Service)

SaaS: In this scenario end user will get the application as a service through internet

Ex:- Gmail, face book, any enterprise application ... etc



→ In the above example server provides application as a service that means

1. Server accepts the request from client.
2. Perform some operation based on request.
3. Return response back to the client

→ SaaS is available in following 2 ways

1) Free Services 2) Paid Services

→ In Free Service end user will get the service from an application through internet for free out of cost. Ex: Face book, YouTube, Google etc...

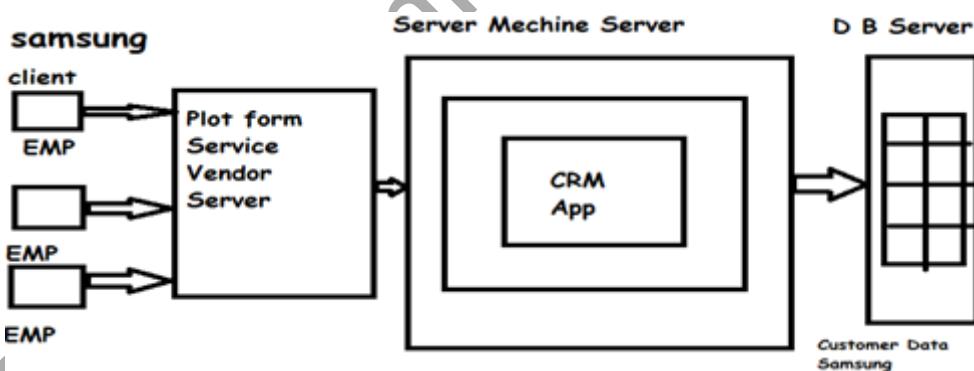
- In Paid Service end user will get the service from the application through internet by paying some amount. **Ex:** Internet Security Services, Matrimonial, Job Searching, CRM apps, etc...
- It is very mandatory to maintain **server** and **database** for every public application or private application (Enterprise Apps) which are used by multiple users,
- If any computer contains server software is known as **server machine** without server software user won't get service from application.
- If any computer contains database software is known as **database machine**, in which customer data is stored permanently in the form of tables, so that accessing of the data becomes very easy in future.
- Enterprise Applications are used by multiple users of a specific business firm so that it must be kept inside the server software and also database is required to store the customer data

PAAS: In this scenario companies (Business firm) will get platform as a service like server, data base, OS... etc through internet.

→ Pass is a paid service provided by platform vendors like Salesforce.com, Microsoft, and Google etc...

Advantages with PASS:

- 1) no need to maintain Server and database in the premises of Business firms
- 2) Maintains cost will be reduced
- 3) Time and resources are reduced along with money while setting up server and data bases



In the above diagram only client machines are available in Samsung premises.

Note: In the above diagram CRM application strictly designed for Samsung

IAAS: In this scenario companies (Business firm) will get hardware equipment as a service
Ex: HardDisk, CPU, Internet etc...

- IAAS is a paid service, PAAS and IAAS can be used by business firms on rental bases (cost per user)
- If number of users are increasing cost of the service is increased.
- SAAS can be used by both end user and business firms.

→The companies which are providing above three cloud services are known as cloud service Vendors.

Ex: Microsoft, Google, Amazon, SFDC etc...

→Because of above cloud services maintaining cost and maintaining burden is reduced on the business firms

History of Sales force:

→The first CRM software was introduced in the year 1993 by Mr.Tomsiebel and that is named as Siebel CRM.

→The main drawback with Siebel CRM is business firm has to maintain their own server and database and it increases maintenance burden on companies.

→In the year 1999 SalesForce CRM was designed by Mr.Mark Benioff, Mr.Parker Harris and they have established one company called **salesforce.com [SFDC]** at Sanfrancisco USA.

→The main advantage with sales force is, **SFDC** will provide SAAS and PAAS services that mean they will maintain server and database separately so that burden on the business firms are reduced.

→Salesforce.com is providing **force.com** platform to the developers through internet that means developer no need to maintain separate environment to design the CRM application using sales force, **SFDC** is releasing following three releases of sales force every year.

1. Summer release
2. Spring release
3. Winter release

Advantages of salesforce compared to other CRM software

- 1) It supports to design the enterprise applications for small, Medium, Large Scale business firms.
- 2) Sales Force provides all cloud services for both developer and business firms, so that maintenance cost and burden is reduced.
- 3) Sales Force is very strong in integration with other application.
- 4) Sales Force internally taken care about the security.

Sales Force Operations:

- 1) Development
 - a) Configuration b) Customization
- 2) Testing
- 3) Deployment
- 4) Integration

Development: Salesforce provides **force.com** platform used to develop and the CRM applications ,enterprise apps, web apps with customized options, it provides following two modules.

Sales Force Admin (Configuration)

Sales Force Development (Customization)

Sales Force Admin: it covers database designing (table creation providing relation between tables, maintaining database etc...) assigning tasks, providing permission, describing work flow rules etc...

Sales Force Developer: it covers UI[web pages] and controller program development

1) Visual Force: It is similar to HTML used to design the web pages and these can be used by employees of business firm.

2) Apex: It is a programming language (Object oriented similar to JAVA) used to design server side programs to connect with database

Note: Apex and Visual Force are the own languages of SFDC

3) Testing: SFDC provides sand box environment for testing of Apps automatically.

4) Deployment: Sales Force provides in built deployment environment. So that applications can be deployed in real time servers (which was provided by salesforce.com)

5) Integration: Sales Force provides pre defined API to integrate the CRM Application with external applications very easily

Technical words in salesforce

1. App → Application
2. org → Organization
3. Standard → Predefined
4. Custom → user defined
5. Object → Table
6. Field → Column
7. Record → A row in a table
8. Tab → short cut to view the table and its records
9. Page layout → web page
10. SOQL → Salesforce object query language

Recruitment Application requirements in salesforce

- Track positions in all stages of the process, from those that are open to those that have been filled or canceled.
- Track all of the candidates who apply for a particular position, including the status of their application (whether they've had a phone screen, are scheduled for interviews, have been rejected or hired, or have passed on an offer that was presented).
- Track the posting of jobs on external employment websites, such as Monster.com.
- Allow employees to post reviews for candidates whom they've interviewed.
- Provide security for the recruiting data so that it's not mistakenly viewed, edited, or deleted by employees who shouldn't have access.
- Automatically inform the relevant recruiter about the next steps that should be taken when a decision has been made about an applicant.
- Automatically inform all employees of new positions that have been posted.
- Make sure that a new job opening has executive approval before it becomes active.
- Include reports that give users an overview of recruiting status.
- Allow recruiters to map the locations of all candidates who are applying for a position, to better understand relocation expenses.
- Make it easy to perform several similar tasks at once, like rejecting multiple job applications.
- Automatically post open positions on company's public website.

Note: an app that meets these requirements is going to greatly increase the efficiency of Company's recruiting and hiring processes

Custom objects of Recruiting application: [Tables]

- 1) Position
- 2) Candidate
- 3) EmploymentWebsite
- 4) JobApplication(junction object for position and candidate Many-Many relationship)
- 5) Review(JobApplication to Review 1-M relationship)
- 6) JobPosting (junction object between Position and EmploymentWebsite M-M relationship)
- 7) Passport(Candidate to Passport 1-1 relationship)

1)Fields of Position Object (columns):

PositionName→text(standard field generated at the time of creation of object)
JobDescription→textarea
MinPay→currency
MaxPay→currency
OpenDate→Date
CloseDate→Date
Status→picklist
SkillsRequired→ textarea(long)
TravelRequired→checkbox
Location→picklist
DaysOpened→formula*

2)Fields of Candidate Object (columns):

CandidateID→autonumber (standard field generated at the time of creation of object)
FirstName→text
LstName→text
Phone→phone
Email→email
Address→textarea
Experience→number
CurrentlyEmployed→checkbox
Salary→currency
DOB→date
Age→number [formula]

3)Fields of EmploymentWebsite:

EmploymentWebsiteName→text(standard field generated at the time of creation of object)
Websiteaddress→url
Priceperpost→currency
MaximumBudget→currency

4)Fields of JobAppliaction: [many to many relation of Candidate and Position]

jobapplicationID→autonumber (standard field generated at the time of creation of object)
Position→lookup
Candidate→lookup

CoverLetter → textarea

JASatus → picklist

5) Fields of JobPosting object: [many to many relation of Position and EmploymentWebsite]

JobpostingID → autonumber (standard field generated at the time of creation of object)

Position → master-detail

Employmentwebsite → master-detail

6) Fields of Review:

ReviewID → autonumber (standard field generated at the time of creation of object)

Rating → number

Reviewmessage → text area

JobApplication → master-detail

7) Fields of Passport(table):

PassportID → autonumber (standard field generated at the time of creation of object)

PassportNumber → number

IssueDate → date

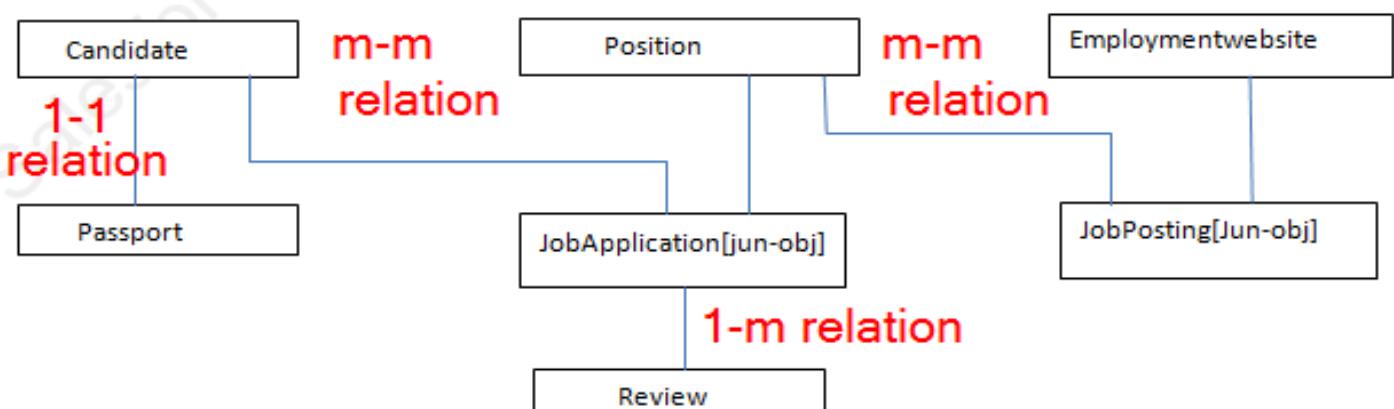
ExpiryDate → date

IssuedLocation → text

Candidate → (master-detail relation)

Note: validation rules can be applied on any object based on requirement

Relationship diagram:



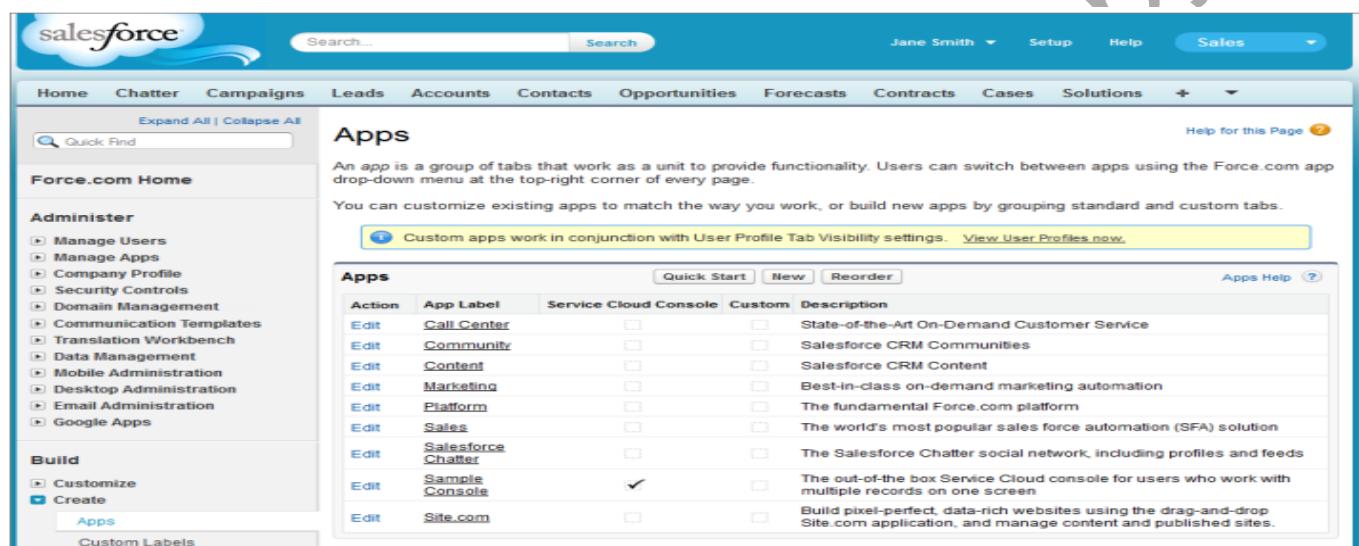
Salesforce Admin Material

Creation of custom application:

1. Click the Setup link in the header



2. Once you're in the Setup area, you'll see a menu on the left side of the page. From that menu, enter Apps in the Quick Find box, and then select Apps. The text that you enter and the page name that you click (in this example, Apps) will change depending on the task you're performing.



3. Click New button → The New Custom App wizard appears.
4. If you are a new user, select Custom app
5. In the App Label field, enter Recruiting (any application name)
6. Click your mouse inside the App Name field → In the Description field, provide some description (optional) → Click Next
7. The next screen in the New Custom App wizard allows you to specify the image file to use for this app's logo. Whenever the app is selected in the Force.com app menu, this logo appears in the upper-left corner of all pages. (Optional) → click Next

Creation of Custom Object[Table Name]:

1. From Setup → expand create in build option → select Objects → click New Custom Object → In the Label field, enter Position(ObjectName) → In the Plural Label field, enter Positions → The Object Name field is defaulted to Position. Let's leave as it is
2. Select AllowReports, AllowActivities, Track FieldHistory, Allow in chattergroups options
3. Select launch new custom tab wizard option → click save button
4. Select object and tab style → click Next button
5. Choose the user profiles for which the new custom tab will be available → click Next

6. Choose the custom apps for which the new custom tab will be available (in this case select Recruiting app) → click Save button

Note: Within the platform, ObjectName is actually stored with __c appended to the end as a suffix(for example, Position__c). This identifies it as a custom object.

New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Position	Example: Account
Plural Label	Positions	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	Position	Example: Account
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Description

This object stores information about the open job positions at our company.

→ The Record Name is the label for the field that identifies individual position records in the system. Salesforce automatically populates Record Name with the custom object label followed by Name. In this case, the field is populated with Position Name. A custom object cannot be saved without this identifying field.

Home Positions

Custom Object Plural Label

Recent Positions

Record Name Label

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object: Position Position Create a new style

Tab Style: Light Blue Dark Blue Green Red Yellow Purple Orange Grey Light Grey Dark Grey Light Green Dark Green Light Orange Dark Orange Light Purple Dark Purple Light Yellow Dark Yellow Light Grey Blue Dark Grey Blue Light Grey Green Dark Grey Green Light Grey Orange Dark Grey Orange Light Grey Purple Dark Grey Purple Light Grey Yellow Dark Grey Yellow

(Optional) Choose a Splash Page Customization for this tab.

Enter a short description for this tab.

Create a new style

Hide already used styles

Tab Style Selector Create your own style

Hide styles which are used on other tabs

Airplane	Alarm clock	Apple	Balls
Bank	Bell	Big top	Boat
Books	Bottle	Box	Bridge
Cell phone	Building Block	Caduceus	Camera
Circle	Chalkboard	Car	CD/DVD
CRT TV	Compass	Chess piece	Chip
Dice	Cup	Computer	Credit card
Form	Factory	Desk	Diamond
Hammer	Gears	Fan	Flag
Heart	Hands[1]	Globe	Guitar
Hot Air Balloon	Helicopter	Hexagon	Headset
Insect		IP Phone	Highway Sign
			Jewel

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings

App Setup

- Customize
- Create
 - Apps
 - Custom Labels
 - Interaction Log Layouts
 - Objects**
 - Packages
 - Report Types
 - Tabs

Custom Objects

Help for this Page ?

Custom objects are database tables that allow you to store data specific to your organization in salesforce.com. You can use them to extend salesforce.com functionality or to build new application functionality.

Edit details about the object

Once you have created a custom object, you can use it to create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the Force.com API.

Delete the object

New Custom Object

Action	Label	Master Object	Deployed	Description
Edit Del	Position			This object stores information about the open job positions at our company.

View every detail about the object, including information that's not in the edit page.

Custom Object Definition Detail

Definition Details

Singular Label	Position	Description	This object stores information about the open job positions at our company.
Plural Label	Positions	Enable Reports	<input checked="" type="checkbox"/>
Object Name	Position	Track Activities	<input checked="" type="checkbox"/>
API Name	Position__c	Track Field History	<input checked="" type="checkbox"/>
Created By	Admin User, 2/2/2010 2:07 PM	Deployment Status	Deployed
		Help Settings	Standard salesforce.com Help Window
		Modified By	Admin User, 2/2/2010 2:07 PM

Standard Fields

Related Lists

Action	Field Label	Data Type	Track History
Created By		Lookup(User)	<input type="checkbox"/>
Last Modified By		Lookup(User)	<input type="checkbox"/>
Edit	Owner	Lookup(User, Queue)	<input type="checkbox"/>
Edit	Position Title	Text(80)	<input type="checkbox"/>

Custom Fields & Relationships

New | Field Dependencies | Set History Tracking | Custom Fields & Relationships Help

No custom fields defined

Introducing Fields:

→ A field is like a database column. The primary characteristic of a field is its data type, some fields hold text values, while others hold currency values, percentages, phone numbers, email addresses, or dates. Some fields look like checkboxes, while still others are drop-down lists or record lookups from which a user makes a selection.

Add Text Fields:

- From Setup → enter Objects in the Quick Find box → select Objects → Click Position.
- In the Custom Fields & Relationships related list, click New
- Choose the Text Area (Long) data type, and click Next
- In the Field Label, enter Job Description(any name)
- Enter Length and Visible Lines field value
- Click Next → Click Next → Click Save & New

→ Every time you create a custom field, you'll first choose a data type from the field type selection page. The platform allows us to choose between different types of text fields.

- Basic text fields allow users to enter any combination of letters and numbers on a single line, up to as many as 255 characters.
- Text area fields also have a 255-character limit but also allow carriage returns so the text can be formatted on separate lines.
- Long text fields allow as many as 131,072 characters, on separate lines, Since job descriptions can be lengthy, let's choose a long text area.

The screenshot shows the 'Position Edit' screen for creating a new position. Several fields are highlighted with red boxes:

- Text field:** Position Title (Benefits Specialist)
- Picklist field:** Status (New Position), Type (Full Time), Functional Area (Finance), Job Level (FN-300)
- Dependent picklist field:** Travel Required (checkbox checked)
- Standard owner field:** Owner (Admin User)
- Date field:** Location (San Francisco, CA), Open Date (2/3/2010), Hire By (5/4/2010), Close Date (2/3/2010)
- Currency field:** Min Pay (75,000.00), Max Pay (100,000.00)
- Checkbox field:** Travel Required (checkbox checked)
- Long text area field:** Job Description (Play a leadership role in the development and implementation of Universal Containers' global employee benefits strategy, programs, policies, and processes.)

Add Currency Fields:

→ To keep track of a position's salary range, we need to add two currency fields MinPay and MaxPay. Note that unlike some fields, once we define these as currency fields, we won't be able to change them to any other type. Defining a currency field is almost identical to defining a text field, with a few slight differences.

→ The Length of a currency field actually corresponds to the number of digits to the left of the decimal point. An additional Decimal Places field handles the number of digits that should be displayed to the right.

→ In the Details page of the wizard, a new checkbox called required is displayed. We can select this option if we want to force our users to enter a value for this field when creating a new position.

Add Checkbox Fields:

→ Add Checkbox Fields Here is some easy ones. The Position object requires a checkbox field travel required for the position (Note that similar to currency fields, once you define a field as a checkbox, you can't change it to any other type.)

Add Date Fields:

→ Date fields to our Recruiting app to track the date a position opens, the date it closes, and the date by which it should be filled. Date fields are automatically include a popup calendar interface from which users can select a day without any typing.

The screenshot shows the 'Position Edit' screen for creating a new position. It includes fields for Position Title, Job Description, Responsibilities, Skills Required, Educational Requirements, Min Pay, Max Pay, Travel Required, and dates (Open Date, Hire By, Close Date). A specific section for 'Optional language checkboxes' is highlighted with a red box, showing checkboxes for Java, JavaScript, C#, and Apex.

Add Picklists: Picklist field is like drop down menu

1. Click Position tab → In the Custom Fields → click New → Select the Picklist data type → click next → In the Field Label, enter Location
2. In the large text area box just below, enter the picklist values like Hyderabad, Bangalore, Chennai, Delhi, Mumbai, Pune etc...
3. Select the Use first value as default value checkbox. This option allows us to populate the field with a default value. If you select it, the field defaults to the first value that you specify in the list of possible picklist values
4. Accept all other default settings for field-level security and page layouts → Click Save
5. In the similar way number,email,phone etc... datatypes can be assigned to fields

Email: email fields in our recruitment application Allows candidates to enter an email address of up to 80 characters, which is validated to ensure proper format.

- 1) Click candidate table → in the custom fields → click new → select the email data type → click next → in the field label enter valid data.
- 2) Select the unique checkbox because email ID is always unique.
- 3) Accept all other default settings for field level security and page layouts → click save.

Add phone fields: Phone fields contain phone numbers, which can include alphabetic characters. Client applications are responsible for phone number formatting.

1) In our recruiting app in the candidate object phone fields are required and it allows candidates to enter phone number and it will automatically populated as universal phone number format.

Add URL fields: URL fields contain URLs. Client applications are responsible for specifying valid and properly formatted URLs in create() and update() calls.

1) Click employment website tab → in the custom fields → click new → select the URL data type → click next in the field label enter website address. It allows 255 characters only.

2) accept all the other default settings for field level security and page layouts → click save.

Define a Validation Rule for Min and Max Pay:

1. Min Pay should never be greater than Max Pay.
2. From the Positions tab, click to open the quick access menu (if it is not open already)
3. Hover over View Validation Rules → click New → In the RuleName, enter Min_Pay_Rule (can be any name). The name of a validation rule can't include any spaces, but if you forget, the platform helpfully changes them to underscores (_) for you.
4. Select the Active checkbox → provide the description → Click the Insert Field button → In the left column, select Position → In the right column, select MinPay → Click Insert → Click the Insert Operator button → choose Greater Than.
5. Click the Insert Field button once again → In the left column, select Position → In the right column, select MaxPay → Click Insert.

Note: error condition formula that looks like: Min_Pay_c > Max_Pay_c

6. In the Error Message enter Min Pay cannot exceed Max Pay → Select the Location of error message → click Save

Validation Rule Edit

Save Save & New Cancel

Rule Name: Min_Pay_Rule
Active:
Description: Min Pay should never exceed Max Pay.

Quick Tips

- Getting Started
- Resources on successforce.com
- Operators & Functions

Error Condition Formula

Example: Discount_Percent_c > 0.30 More Examples
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area.

Insert Field Insert Operator

Error Message

Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true
Error Message: Min Pay cannot exceed Max Pay.

This error message can either appear at the top of the page or below a specific field on the page
Error Location: Top of Page Field Min Pay

If the error condition evaluates to True, the validation rule prevents the record from being saved.

The validation rule also allows you to specify the text and location of the resulting error message.

ABS
AND
BEGINS
BR
CASE
CEILING

ABS(number)
Returns the absolute value of a number, a number without its sign
[Help on this function](#)

Save Save & New Cancel

Introducing Page Layouts:

- A page layout controls the position and organization of the fields and related lists that are visible to users when viewing a record.
- Page layouts also help us control the visibility and editability of the fields on a record very easily. The Force.com platform has drag-and-drop tool for editing page layouts

Page layout of the Position object:

- From Setup, enter Objects in the Quick Find box, then select Objects → Click Position.
- In the Page Layouts related list, click new → provide Position Layout (any name)

The screenshot shows the Salesforce Layout Editor interface. At the top, there are buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a palette titled 'Fields' lists categories like Buttons, Actions, Expanded Lookups, Related Lists, and Report Charts. A 'Quick Find' search bar is at the top of the palette. To the right of the palette, a 'Position Detail' page layout is displayed. The layout includes sections for 'Standard Buttons' (Edit, Delete, Clone, Sharing) and 'Custom Buttons'. Below these are various fields: Position Title (Sample Position Title), Job Description (Sample Job Description), Responsibilities (Sample Responsibilities), Skills Required (Sample Skills Required), Educational Requirements (Sample Educational Requirements), Min Pay (\$123.45), Max Pay (\$123.45), Travel Required (✓), Java (✓), JavaScript (✓), C# (✓), Apex (✓), Open Date (10/14/2013), Hire By (10/14/2013), Close Date (10/14/2013), Location (Sample Location), Status (Sample Status), Type (Sample Type), Functional Area (Sample Functional Area), Job Level (Sample Job Level), and Days Open (32,401). A red box highlights the text 'The palette moves as the page scrolls so it's always visible.' Another red box highlights the text 'Drag fields around in the layout and organize them within sections.'

Group Fields into a New Section:

- On a page layout, a section is simply an area where we can group similar fields under an appropriate heading.
- This makes it easy for our users to quickly identify and enter the information for a record, especially if our object has a large number of fields:
- In the palette, select the Fields category
- Drag the Section user interface element from the palette to just above the System Information section on the page layout. When you drag a new section on to the page layout, the Section Properties popup window appears.
- In the Section Name, enter Compensation(any name). The Section Name field controls the text that's displayed as the heading for the section.

- In the Layout drop-down list, choose 2-Column. This option allows us to choose whether we want the fields in our section to be arranged in two columns or one. The default is two columns and is the most common choice. However, if our section is going to contain text area fields, the one-column layout gives them more space on the page for display
- In the Tab-key Order drop-down list, choose Left-Right. This setting controls the direction that a user's cursor will move when using the Tab key to navigate from field to field.
- Click OK. We have a new section for Compensation just above the System Information section! Let's add the MinPay and MaxPay fields:
- While pressing CTRL, click both the Min Pay and Max Pay fields in the Information section, and drag them to the new Compensation
- Create a new one-column Description section below the Compensation section, and drag Job Description, Responsibilities, Skills Required, and Educational Requirements into it.
- Arrange the first column of the Information section as follows

The screenshot shows the Salesforce 'Position Detail' page. At the top, there are standard buttons: Edit, Delete, Clone, and Sharing, followed by Custom Buttons. The main content is organized into three sections: 'Information' (header visible on edit only), 'Compensation', and 'System Information' (header visible on edit only).

Information (Header visible on edit only):

	Value	Owner	Sample User
Position Title	Sample Position Title		
Job Description	Sample Job Description		
Skills Required	Sample Skills Required		
Educational Requirements	Sample Educational Requirements		
Travel Required	✓		
Java	✓		
JavaScript	✓		
C#	✓		
Apex	✓		
Open Date	8/24/2009		
Hire By	8/24/2009		
Close Date	8/24/2009		
Location	Sample Location		
Status	Sample Status		
Type	Sample Type		
Functional Area	Sample Functional Area		
Job Level	Sample Job Level		
Days Open	2,385		

Compensation:

Min Pay	\$123.45	Max Pay	\$123.45
---------	----------	---------	----------

System Information (Header visible on edit only):

Created By	Sample User	Last Modified By	Sample User
------------	-------------	------------------	-------------

Introducing Custom Formula Fields:

- we can use custom formula fields to define calculations that are specific to our Recruiting app.
- Calculating How Long a Position Has Been Open:
 - A custom formula field that calculates how many days a position has been open. To do this, let's first think about the logic that we should use to define the field, and then we can go through the process of creating it in our Recruiting app.
 - we need to know the current date and the date the position was created. If we could somehow subtract these two, we'd have the number of days that the position has been open. Fortunately, it's easy to get both of these values.
 - For the current date, we can use the platform's built-in TODAY() function. TODAY() returns today's date.
 - For the date that the position was opened, we can use the Open Date field that we defined in the last chapter.

→ When using fields in formulas, you can't just refer to a field by its name. Instead, you need to refer to it by its merge field name, also called its API name. The format of the API name is typically the name of the field but with underscores instead of spaces.

→ For custom fields, the API name is suffixed with two underscores and the letter "c," like this: Open_Date__c. This naming convention in the platform helps distinguish between standard and custom fields.

Tip: You don't need to memorize the API names of fields you want to use in formulas. Simply use the field picker in the formula editor to insert fields and the platform automatically inserts the API name for you. If you ever want to know the API name of a specific field and you aren't using the formula editor, you can view the field's detail page.

→ Once again, we can dip into the extensive library of platform functions. The IF() function allows us to perform a test and then return different values depending on whether the result of the test is true or false. The IF() function's syntax looks like:

IF(logical_test,value_if_true,value_if_false)

→ For the logical_test portion, we'll test whether the Close Date field has a value—if it does, the position obviously must be closed. We'll test for this with a third built-in function: ISBLANK(). ISBLANK() takes a single field and returns true if it does not contain a value and false if it does. So now our formula looks like:

IF(ISBLANK(Close_Date__c),value_if_true,value_if_false)

→ By replacing value_if_true and value_if_false with the other formulas we talked about, we've now figured out our whole formula.

IF(ISBLANK(Close_Date__c),TODAY()-Open_Date__c,Close_Date__c-Open_Date__c)

→ Our formula calculates the number of days a position has been open, regardless of whether it's currently open or closed. Now, let's go define a field for it on our Position object. Try It Out: Define a "Days Open" Custom Formula Field

→ We'll begin building the formula field the same way we created our other custom fields. From the position tab ,to open the quick access menu



→ Select the Formula data type, and click Next.

Position
New Custom Field

Step 2. Choose output type

Field Label: Days Open

Field Name: Days_Open

Help for this Page

Step 2 of 5

Previous Next Cancel

Indicates the formula's result is a number

Indicates number of digits to display to the right of the decimal place

Formula Return Type

None Selected

Currency

Date

Date/Time

Number

Percent

Text

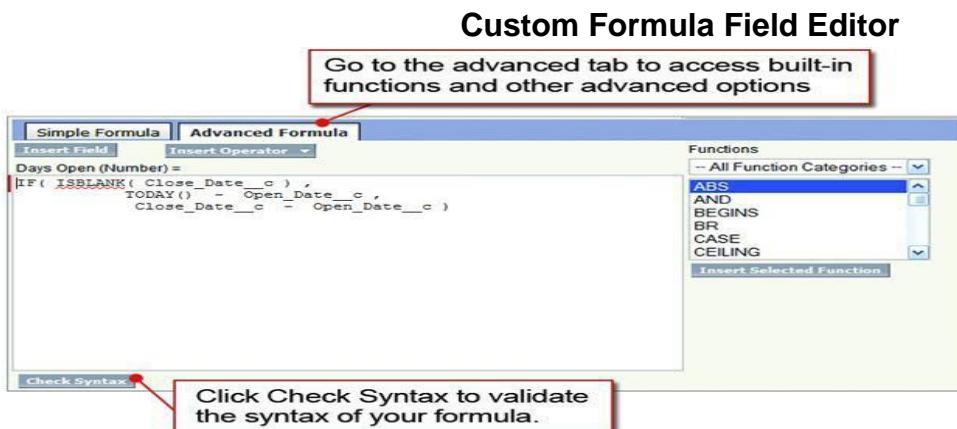
Options

Decimal Places: 0 Example: 999

For mo

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6193194

- In the Field Label field, enter Days Open. Field Name is populated automatically. Select the Number formula return type.
- In this case, even though we're subtracting Date fields, we want to end up with just a regular numeric value.
- Change the Decimal Places value to 0, and click Next.
- Now it's time to enter the details of our formula.
- Click the Advanced Formula tab, as shown in the following screenshot.



- We want to use the Advanced Formula tab so we can access the platform's built-in functions through the Functions list on the right side. From the Functions list, double-click IF.

Our formula now looks like this:

IF(logical_test, value_if_true, value_if_false)

Let's go ahead and define the logical test:

- Delete logical_test from the formula, but leave your cursor there → From the Functions list, double-click ISBLANK → Delete expression from the ISBLANK function you just inserted, but leave your cursor there → Click the Insert Field button. Two columns appear in an overlay → In the left column, select Position → In the right column, select Close Date → Click Insert.

IF(ISBLANK(Close_Date__c), value_if_true, value_if_false)

let's specify the value if our logical test evaluates to true:

- Delete value_if_true from the formula, but leave your cursor there → From the Functions list, double-click TODAY → Click the Insert Operator button and choose Subtract → Click the Insert Field button → In the left column, select Position → In the right column, select Open Date → Click Insert.

let's specify the value if our logical test evaluates to false:

- Delete value_if_false from the formula, but leave your cursor there → Click the Insert Field button → In the left column, select Position → In the right column, select Close Date and click Insert → Click Insert Operator and choose Subtract → Click the Insert Field button → In the left column, select Position → In the right column, select Open Date and click Insert.

- Now that we've gone through those steps of the procedure, note that we could have just typed in the formula that we figured out in the last section. However, using the formula editor is a lot easier because you don't have to

- Click Check Syntax to check your formula for errors → Select Treat blank fields as blanks, and click Next → Accept all remaining field-level security and page layout defaults → Click Save.

Introducing Relationships:

- In terms of relational data, a relationship is a two-way association between two objects.
- The main purpose of maintaining relations between the tables is to merge records of two different tables.
- In database, following 3 types of relations can be maintained between the tables

1) One to one 2) One to many (or) many to one 3) Many to many

Primary key:

- a) It is used to identify the record.
- b) Primary key must be unique and not null.

Foreign key:

- a) In the primary key one table is imported in another table to maintain the relations is known as foreign key.
- b) By default foreign key value must be not null

parent table:

- Any independent table in the database is known as parent table.

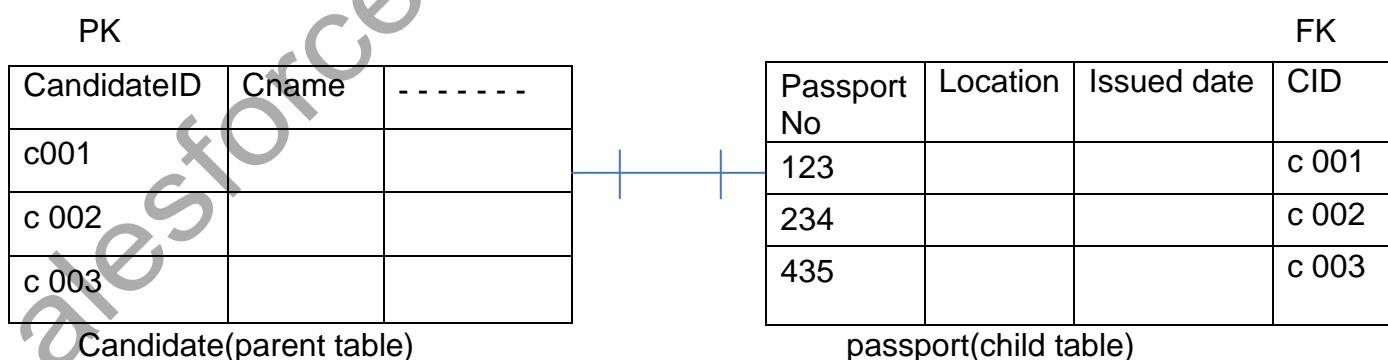
Child table:

- Any dependent table is known as child table.

Note: In the above 3 relations primary key of parent table should be made as foreign key in the child table only

Rules to maintain one to one relation: in this scenario one record of one table can merge with single record of other table

- 1) Make the primary key of parent table as foreign key in the child table.
- 2) Apply the validation rule on the foreign key of the child table.



Rules to maintain one to many (or) many to one relation: in this scenario one record of one table can merge with multiple records of other table

- make the primary key of parent table as foreign key in the child table.

DepartmentID	Dname	location
d001		
d002		
d003		

Department(parent table)

EMP ID	Ename	DID
123		d001
456		d001
312		d002

employee(child table)

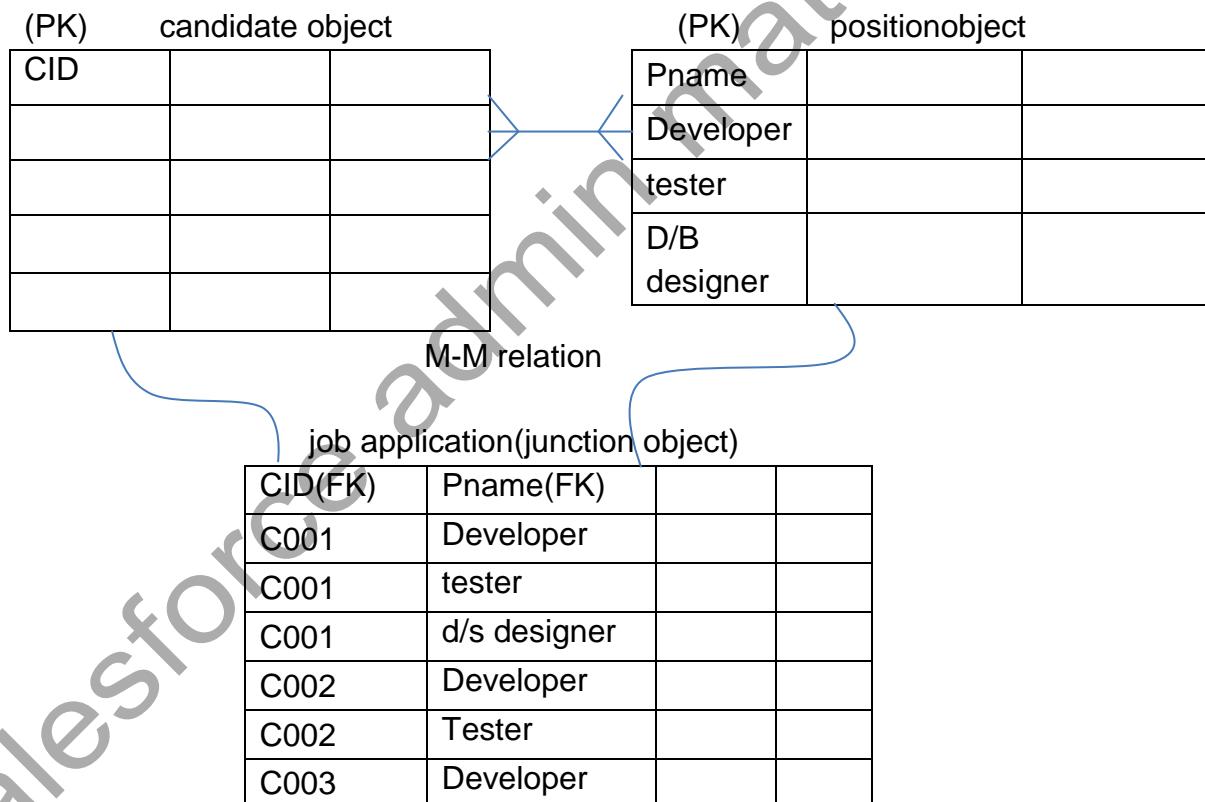
Rules to maintain many to many relation: In this scenario multiple records of one table can merge with multiple records of other table

1) Create a separate table with any userdefined name(it is known as junction object.)

NOTE: Junction object acts as child table.

2) Make the primary keys of both tables as foreign keys in the junction object.

3) Junction object can have any number of columns (but it is recommended that the column either must exist in both the parent tables or should not exist in both the parent tables)



Junction object: It is a child table created while maintaining many to many relation between the object.

NOTE: Relations always can be maintained between only two tables at a time.

Types of relations in salesforce:[approches]

1)Salesforce allows to maintain 1 to 1 ,one to many and many to many relations practically by following any of two approaches.

- a) Lookup relation
- b) Master-detail relation

Differences between look-up and master detailed relation:

Look-up relation	Master-detail relation
<p>1)In this case child object record is not deleted even its associated parent object record is deleted.</p> <p>2)It allows to alter the child table even that object contain records</p> <p>3)It is optional to store the data in foreign key field of child object.</p> <p>4)It doesn't support roll-up summary fields.</p>	<p>1)In this case child record is deleted whenever its associated parent record is deleted.</p> <p>2)It doesn't allow to alter the child table if that object contain record.</p> <p>3)It is very mandatory to store the data in foreign key field of child object.</p> <p>4)It supports roll-up summary fields.</p>

Relationships Allow Information about Other Object Records to be Displayed on a Record Detail Page:

Position
Technical Writer

Customize Page | Edit Layout | Printable View | Help for this Page ?

Position Detail

Position Title	Technical Writer	Edit Delete Clone Sharing
Status	Closed - Canceled	Owner Jane Smith [Change]
Type		Location San Francisco, CA
Functional Area		
Job Level		
Travel Required		
Created By	Jane Smith, 7/9/2010 12:59 PM	
Hiring Manager		

Candidate Map

Job Applications

New Job Application

Job Applications Help ?

Action	Job Application Number	Candidate	Status	Created Date	Owner First Name	Owner Last Name
Edit Del	JA-00001	C-00001	Rejected	7/22/2010	Jane	Smith
Edit Del	JA-00002	C-00001	New	7/29/2010	Jane	Smith

Introducing Relationship Custom Fields:

- ➔ we can define a relationship between two objects through the use of common fields. On the platform, we can define relationships between objects by creating a relationship custom field that associates one object with another.
- ➔ A relationship field is a custom field on an object record that contains a link to another record.
- ➔ There are different types of relationship fields, each with different implications. The simplest and most flexible type is a lookup relationship field, which creates a simple relationship between two objects.
- ➔ For example, if we place a lookup relationship field on a Job Application object that references position records, many job application records can be related to a single position record. This will be reflected both with a new Position field on the job application record and with a new Job Applications related list on the position record.
- ➔ You can also put multiple lookup relationship fields on a single object, which means that our Job Application object can also point to a Candidate object.
- ➔ A second type of relationship field, master-detail relationship, is a bit more complex, but more powerful. Master-detail relationships create a special parent-child relationship between objects: the object on which you create the master-detail relationship field is the child or “detail,” and the object referenced in the field is the parent or “master.”
- ➔ In a master-detail relationship, the ownership and sharing of detail records are determined by the master record, and when you delete the master record, all of its detail records are automatically deleted along with it.
- ➔ Master-detail relationship fields are always required on detail records, and once you set a master-detail relationship field's value, you can't change it.
- ➔ When do you use a master-detail relationship? If you have an object that derives its significance from another object. For example, say you have a Review custom object that contains an interviewer's feedback on a job application. If you delete a job application record, you will probably want all of its review records deleted as well, being that reviews of something that no longer exists aren't very useful. In this case, you want to create a master-detail relationship on the Review custom object with the Job Application object as the master object.

Create the Candidate Object:

Field	Value
Label	Candidate
Plural Label	Candidates
Object Name	Candidate
Description	Represents an applicant who might apply for one or more positions
Context-Sensitive Help Setting	Open the standard Salesforce Help & Training window
Record Name	Candidate Name
Data Type	Auto Number
Display Format	C-{00000}
Starting Number	00001
Allow Reports	Yes
Allow Activities	Yes
Track Field History	Yes
Allow Search	Yes
Deployment Status	Deployed
Add Notes & Attachments related list to default page layout	Yes
Launch New Custom Tab Wizard after saving this custom object	Yes

→ To create the Candidates tab, select a Tab Style in the first step of the wizard, and then accept all the defaults until you get to the Add to Custom Apps page. On this page, select only the Recruiting App and click Save.

Add Fields to the Candidate Object:

The screenshot shows the Candidate Edit page for object C-00001. The page is divided into sections: Information, Address, Employment, and Additional Details. The Information section contains fields for Candidate Number (C-00001), First Name (George), Last Name (Schnell), SSN (987654321), Owner (Admin User), Phone ((619) 555-5555), Mobile ((510) 555-5555), Fax ((510) 555-5555), and Email (george@schnell.com). The Address section includes Street (111 Main St.), City (Florida), State/Province (FL), Zip/Postal Code (92111), and Country (USA). The Employment section shows Currently Employed checked, Current Employer (Seaworld), Years of Experience (3), and Education (Ph.D.). The Additional Details section has US Citizen unchecked and Visa Required checked. At the bottom are Save, Save & New, and Cancel buttons.

Data Type	Field Label	Other Values
Text	First Name	Length: 50 External ID: Selected
Text	Last Name	Length: 50 External ID: Selected
Phone	Phone	
Email	Email	External ID: Selected
Text	Street	Length: 50
Text	City	Length: 50
Text	State/Province	Length: 50
Text	Zip/Postal Code	Length: 15
Text	Country	Length: 50
Text	Current Employer	Length: 50
Number	Years of Experience	Length: 2 Decimal Places: 0
Text	SSN	Length: 9
Picklist	Education	Picklist values: • HS Diploma • BA/BS • MA/MS/MBA • Ph.D. • Post Doc
Checkbox	Currently Employed	Default: Checked
Checkbox	US Citizen	Default: Checked
Checkbox	Visa Required	Default: Unchecked
Phone	Mobile	
Phone	Fax	

Candidate C-00002

« Back to List: Custom Object Definitions

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[Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

Candidate Detail		Edit	Delete	Clone												
Candidate Number	C-00002	Owner	Admin User [Change]													
First Name	Chris	Phone	(415) 987-6543													
Last Name	McGuire	Mobile	(415) 987-4321													
SSN	555432211	Fax														
		Email	chris@mcquiere.com													
▼ Address <table border="1"> <tr> <td>Street</td> <td>1 Market St.</td> <td>State/Province</td> <td>CA</td> </tr> <tr> <td>City</td> <td>San Francisco</td> <td>Zip/Postal Code</td> <td>94105</td> </tr> <tr> <td></td> <td></td> <td>Country</td> <td>USA</td> </tr> </table>					Street	1 Market St.	State/Province	CA	City	San Francisco	Zip/Postal Code	94105			Country	USA
Street	1 Market St.	State/Province	CA													
City	San Francisco	Zip/Postal Code	94105													
		Country	USA													

Bringing Candidates and Positions Together with Job Applications:

- Our app can track candidates and open positions. We can create lookup relationship fields on the Candidate object that let recruiters specify the positions in which the candidate is interested, but what if we want to track additional information, such as whether the candidate is currently scheduled to interview for one of those positions?
- We can satisfy these requirements with a Job Application custom object that stores data about an individual candidate's application to a single position. Each time a candidate wants to apply for a position, the recruiter can create a job application record that contains the candidate's name and the position to which he or she is applying.

Create the Job Application Object:

Field	Value
Label	Job Application
Plural Label	Job Applications
Object Name	Job_Application
Description	Represents a candidate's application to a position
Context-Sensitive Help Setting	Open the standard Salesforce Help & Training window
Record Name	Job Application Name
Data Type	Auto Number
Display Format	JA-{00000}
Starting Number	00001
Allow Search	Yes
Allow Reports	Yes
Allow Activities	Yes
Track Field History	Yes
Deployment Status	Deployed
Add Notes & Attachments related list to default page layout	Yes
Launch New Custom Tab Wizard after saving this custom object	Yes

- To create the Job Applications tab, select a Tab Style in the first step of the wizard, and then accept all the defaults until you get to the Add to Custom Apps page. On this page, select only the Recruiting app, and then click Save.

Add Fields to the Job Application Object:

Data Type	Field Label	Other Values
Lookup Relationship	Candidate	Related To: Candidate Related List Label: Job Applications
Lookup Relationship	Position	Related To: Position Related List Label: Job Applications
TextArea (Long)	Cover Letter	Length: 32,768 # of Visible Lines: 6
Picklist	Status	Picklist values: <ul style="list-style-type: none">• New• Review Resume• Phone Screen Schedule Interviews Extend an Offer Hired Rejected Use first value as default value: Selected

Job Application Edit
JA-00001

[Help for this Page](#)

Job Application Edit Save Save & New Cancel

Information

Job Application Number	JA-00001	Owner	Admin User
Candidate	C-00001	Edit Delete	
Position	Benefits Specialist	Edit Delete	
Cover Letter	Edit Delete		
Status	<div style="border: 1px solid #ccc; padding: 2px;"> Phone Screen --None-- New Review Resume Phone Screen Schedule Interviews Extend an Offer Hired Rejected </div>	Save & New	Cancel

Job Application JA-00001

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

Job Application Detail [Edit](#) [Delete](#) [Clone](#)

Job Application Number	JA-00001	Owner	Admin User [Change]
Candidate	C-00001	Edit Delete	
Position	Benefits Specialist	Edit Delete	
Cover Letter		Edit Delete	
Status	Phone Screen	Edit Delete	
Created By	Admin User, 2/3/2010 2:24 PM	Last Modified By	Admin User, 2/3/2010 3:01 PM

The Job Application record looks up the Candidate Number and Position Title from the Candidate and Position records.

Position Benefits Specialist

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

Position Detail [Edit](#) [Delete](#) [Clone](#)

Position Title	Benefits Specialist	Owner	Admin User [Change]
Status	New Position	Edit Delete	
Type	Full Time	Location	San Francisco, CA
Functional Area	Human Resources	Open Date	2/3/2010
Job Level	HR-200	Hire By	5/4/2010
Travel Required		Close Date	
Created By	Admin User, 2/3/2010 2:55 PM	Last Modified By	Admin User, 2/3/2010 3:02 PM
Hiring Manager	Dave Carroll	Edit Delete Clone	

The Candidate and Position records display the associated Job Applications in the related list.

Candidate C-00001

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Candidate Detail [Edit](#) [Delete](#) [Clone](#)

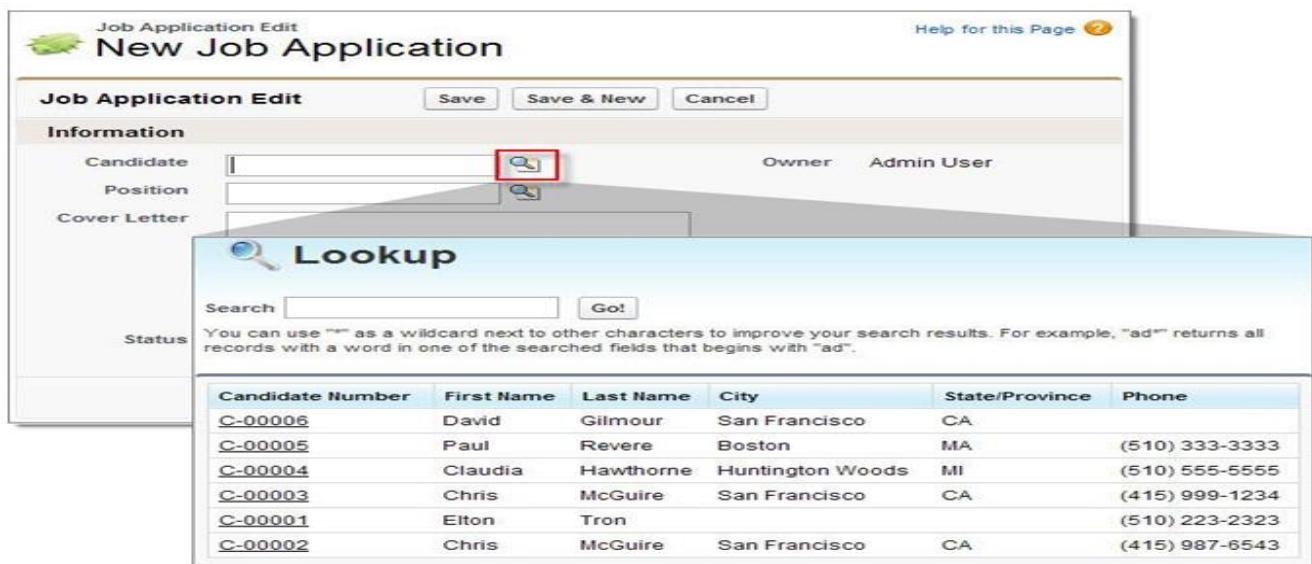
Candidate Number	C-00001	Owner	Admin User [Change]
First Name	Elton	Phone	(510) 223-2323
Last Name	Trot	Mobile	
SSN	987654321	Fax	
Address			

Job Applications

[New Job Application](#) [Job Applications Help](#)

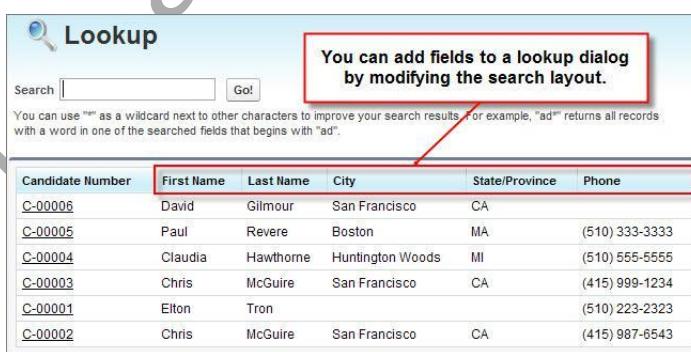
Action	Job Application Number
Edit Delete	JA-00001

Default Candidate Lookup on the Job Application Object:



Add Fields to the Candidate Lookup Dialog:

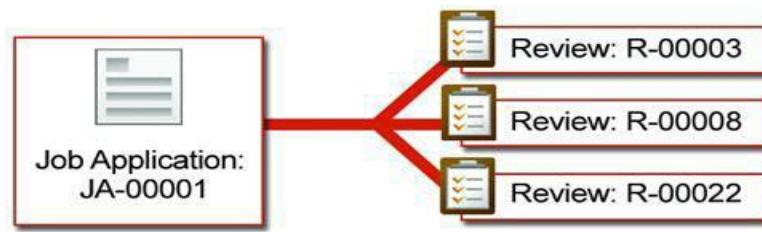
1. From Setup, enter Objects in the Quick Find box, then select Objects → Click Candidate.
 2. In the Search Layouts related list, click Edit next to the Lookup Dialogs layout.
- The Edit Search Layout page includes a list of available fields from the Candidate object. You can choose up to ten fields to include in the lookup dialog, and order them in any way you choose, except that the object's unique name or number field (such as Candidate Name) must be listed first.
3. Move the following fields into the Selected Fields box under Candidate Name: First Name, Last Name, City, State/Province, Phone → Click Save.
- return to the Job Applications tab, and click New. When you click the lookup icon next to the Candidate field, the dialog is now much more useful.



Review Object:

→ The Review object has a many-to-one relationship with the Job Application object because one job application can have one or more reviews associated with it. A related list on the job application record will show the associated reviews, representing the "many" side of the relationship.

→ Review Has a Many-to-One Relationship with Job Application



→ However, instead of creating this relationship with a lookup relationship field, this time we'll use a master-detail relationship field.

→ A master-detail relationship field makes sense in this case because reviews lose their meaning when taken out of the context of a job application, so we'll want to automatically delete reviews when we delete the job application to which they're related.

Create the Review Object:

→ To create the Review object, from Setup, enter Objects in the Quick Find box, then select Objects, click New Custom Object, and fill out the page according to the following table

Field	Value
Label	Review
Plural Label	Reviews
Object Name	Review
Description	Represents an interviewer's assessment of a particular candidate
Context-Sensitive Help Setting	Open the standard Salesforce Help & Training window
Record Name	Review Name
Data Type	Auto Number
Display Format	R-{000000}
Starting Number	000001
Allow Reports	Yes
Allow Activities	Yes
Track Field History	Yes
Allow Search	Yes
Deployment Status	Deployed
Add Notes & Attachments related list to default page layout	Yes
Launch New Custom Tab Wizard after saving this custom object	No

Add Fields to the Review Object:

→ Let's start by adding the master-detail relationship field, which will relate our Review object with the Job Application object. To create the master-detail relationship field, access the Review object detail page.

1. From Setup, enter Objects in the Quick Find box, then select Objects → Click Review.
2. In the Custom Fields & Relationships related list, click New.
3. Select Master-Detail Relationship, and click Next.
4. In the Related To drop-down list, choose Job Application → click Next.

5. Click in the Field Name text box to automatically populate it with the field name Job_Application
6. leave the Read/Write radio button selected → Click Next.
7. Accept the defaults in the remaining three steps of the wizard → Click Save.

Add Custom Fields to the Review Object:

Data Type	Field Label	Other Values
Text Area (Long)	Assessment	Length: 32,768 # of Visible Lines: 6
Number	Rating	Length: 1 Always require a value in this field in order to save a record Help text: Enter a 1-5 rating of the candidate.

→ When you're done, add a quick validation rule to ensure that the Ratings field only accepts the numbers 1 through 5. This will keep our review rating system consistent throughout our organization.

1. From Setup, enter Objects in the Quick Find box, then select Objects → Click Review.
2. In the Validation Rules related list, click New.
3. In the Rule Name text box, enter Rating_Scale_Rule.
4. Select the Active checkbox.
5. Enter the following error condition formula

(Rating_c < 1 || Rating_c > 5)

→ This formula prevents the record from being saved if the value of the Rating field is less than one or greater than five.

→ In the Error Message text box, enter Invalid rating. Rating must be between 1 and 5 → Click Save

Many-to-Many Relationship:

→ In systems analysis, a many-to-many relationship is a type of cardinality that refers to the relationship between two entities A and B in which A may contain a parent instance for which there are many children in B and vice versa.

→ employment websites, and we wanted to track which open positions we posted to those sites? This would require a many-to-many relationship because:

- One position could be posted on many employment websites.
- One employment website could list many positions.

→ Here's where we get a little creative. Instead of creating a relationship field on the Position object that directly links to the Employment Website object, we can link them using a junction object. A junction object is a custom object with two master-detail relationships, and is the key to making a many-to-many relationship.

Using a Job Posting Object to Create a Many-to-Many Relationship Between Positions and Employment Websites:



→ In relational database terms, each job posting record is a row in the Job Posting table consisting of a foreign key to a position record and a foreign key to an employment website record. The following entity relationship diagram shows this relationship.

→ Entity Relationship Diagram for the Position, Job Posting, and Employment Website Objects



→ Consequently, in order to define a many-to-many relationship between the Position and Employment Website objects, we'll need to create a Job Posting object with the following fields:

- A Position master-detail relationship
- An Employment Website master-detail relationship

Create the Employment Website Object:

Field	Value
Label	Employment Website
Plural Label	Employment Websites
Starts with Vowel Sound	Checked
Object Name	Employment_Website
Description	Information about a particular employment website
Context-Sensitive Help Setting	Open the standard Salesforce Help & Training window
Record Name	Employment Website Name
Data Type	Text
Allow Reports	Yes
Allow Activities	Yes
Track Field History	Yes
Deployment Status	Deployed
Add Notes & Attachments related list to default page layout	Yes
Launch New Custom Tab Wizard after saving this custom object	Yes

→ To create the Employment Website tab, select a Tab Style in the first step of the wizard, and then accept all the defaults until you get to the Add to Custom Apps page. On this page, select only the Recruiting App, and then click Save.

Add the URL Field to the Employment Website Object:

- From Setup, enter Objects in the Quick Find box, then select Objects, and then click Employment Website to view its detail page.
- In the Custom Fields & Relationships related list, use the New button to create three custom fields according to the following table.
- Where necessary, we've indicated some additional values you'll need to fill in when creating the fields. Otherwise you can simply accept all defaults.

Add Custom Fields to the Employment Website Object:

Data Type	Field Label	Other Values
URL	Web Address	Required
Currency	Price Per Post	Length: 5 Decimal Places: 2 Required
Currency	Maximum Budget	Length: 6 Decimal Places: 2 Required

→ The Employment Website object needs to store the Web address of the employment website. For that URL data type is required. That way, when users click the field, the URL will open in a separate browser window.

→ In addition to the URL, since most employment websites charge per posting, to keep track of how much it costs to post there, as well as maximum budget for posting on the site.

Create the Job Posting Object:

→ From Setup, enter Objects in the Quick Find box, then select Objects, click New Custom Object, and fill out the page according to the following table.

Field	Value
Label	Job Posting
Plural Label	Job Postings
Object Name	Job_Posting
Description	Represents the junction object between a position and an employment website
Context-Sensitive Help Setting	Open the standard Salesforce Help & Training window
Record Name	Job Posting Name
Data Type	Auto Number
Display Format	JP-{00000}
Starting Number	00001
Allow Reports	Yes
Allow Activities	Yes
Track Field History	Yes
Deployment Status	Deployed
Add Notes & Attachments related list to default page layout	Yes
Launch New Custom Tab Wizard after saving this custom object	No

Add Fields to the Job Posting Object:

→ To turn the Job Posting object into the junction object that relates the Position and Employment Website objects, we'll need to add two master-detail relationship fields.

→ The first master-detail relationship will be the primary relationship. The detail and edit pages of our junction object (Job Posting) will use the color and any associated icon of the primary master object (Position).

→ In addition, the junction object records will inherit the value of the Owner field and sharing settings from their associated primary master record.

1. From Setup, enter Objects in the Quick Find box, then select Objects → Click Job Posting.
2. In the Custom Fields & Relationships related list, click New
3. Select Master-Detail Relationship, and click Next.
4. In the Related To drop-down list, choose Position, and click Next.
5. In the Field Label text box, enter Position. When you move your cursor, the Field Name text box should be automatically populated with Position as well.
6. Accept the remaining defaults, and click Next until you reach the final step of the wizard.
7. Accept the other defaults and click Save & New.

→ The next step is to create a second master-detail relationship on the Job Posting object to link it with the Employment Website object.

→ Deleting a record of the secondary master object will automatically delete its associated junction object records. So in our app, if you delete an employment website record, all of its associated job posting records are deleted as well, even if the position is open.

8. Select Master-Detail Relationship, and click Next.

9. In the Related To drop-down list, choose Employment Website, and click Next.

10. In the Field Label text box, enter Employment Website. When you move your cursor, the Field Name text box should be automatically populated with Employment_Website as well.

11. Click Next. Because we are creating a master-detail relationship, these settings cannot be changed.

12. Click Next. These settings cannot be changed as well.

13. Click Next to view the final step of the wizard.

14. Accept the other defaults and click Save.

Roll-up Summary fields: A field type that automatically provides aggregate values from child records in master-detail relationship

→ Roll-up Summary field can be created only on Master table in Master-Detail relationship.

→ A field type that automatically provides aggregate values from child records in Master-detail relationship.

→ When creating a field on an object that is not relationship, the roll up summary data type is not available. This is because Roll-up summary fields are only available in the Master object in Master Detail relationship.

→ Roll-up summary field values are automatically display on the master record

→ The rating system we created on the Review object lets users quickly see each reviewer's opinion of the candidate's suitability for the position. While each individual opinion is important, it would be even better to see these ratings compiled in a way that summarizes how the candidate did overall. For example if we could have a Total Rating field on each Job Application record that shows the sum of all the job application's review ratings?

→ A simple roll-up summary field on the Job Application object can summarize data from a set of related detail records and automatically display the output on a master record. Use roll-up summary fields to display the sum, minimum, or maximum value of a field in a related list, or the record count of all records listed in a related list.

Note: Formula field calculate values using fields within a single record where as roll up summary fields calculate values from set of related records.

→ It is Read only field which displays SUM, MIN or MAX, COUNT value of a field in related list or record count of all records listed in a related list

Note: When creating a field on an object(if that is not the master in a master-detail relationship) then the Roll-Up Summary data type is not available, why because roll-up summary fields are available only on the master object in a master-detail relationship.

Create Roll-Up Summary Fields:

Begin creating your roll-up summary just as you create any other custom field:

→From Setup, enter Objects in the Quick Find box, then select **Objects**.

→Click **Job Application**.

→In the Custom Fields & Relationships related list, click **New**.

→Select the Roll-Up Summary data type, and click **Next**

Data Type

<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input checked="" type="radio"/> Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

1. In the Field Label enter Total Rating→Once you move your cursor, the FieldName text box automatically populates with Total-rating→click **Next**

Step 2. Enter the details

Step 2 of 5

Previous Next Cancel

Field Label	<input type="text" value="Total Rating"/>
Field Name	<input type="text" value="Total_Rating"/>
Description	<input type="text"/>
Help Text	<input type="text"/>

2. In the Summarized Object drop-down list, choose Reviews.
3. Under Select Roll-Up Type, select SUM.
4. In the Field to Aggregate drop-down list, select Rating.
5. LeaveAll records should be included in the calculationselected, andclick **Next**.
6. Accept all remaining field-level security and page layout defaults→Click **Save**.

→Roll-up summary fields themselves don't allow you to average values together, but you can use them in formulas that do

→Let's create a second roll-up summary field on the Job Application object, and then build a simple formula field that uses both roll-up summary fields to find the average rating

1. From Setup, enter Objects in the Quick Find box, then select **Objects**.
2. Click **Job Application**.
3. In the Custom Fields & Relationships related list, click **New**.
4. Select the Roll-Up Summary data type, and click **Next**.
5. In the Field Label field, enter Number of Reviews. Once you move your cursor, the Field Name text box automatically populates with Number_of_Reviews→Click **Next**.
6. In the Summarized Object drop-down list, choose Reviews.
7. Under Select Roll-Up Type, select COUNT.

→ We don't need to specify a Field to Aggregate this time since we're just counting the number of related detail records and are not interested in any specific field

8. Leave All records should be included in the calculation selected, and click **Next**.

9. Accept all remaining field-level security and page layout defaults → Click **Save**

→ Both roll-up summary fields are in place now. Let's build a formula field called Average Rating that divides the value of the first roll-up summary field by the value of the second.

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

2. Click **Job Application**.

3. In the Custom Fields & Relationships related list, click **New**.

4. Select the Formula data type, and click **Next**.

5. In the Field Label field, enter Average Rating. Once you move your cursor, the Field Name text box automatically populates with Average_Rating.

6. Select the Number formula return type and click **Next**.

7. Click the **Insert Field** button.

8. Select Job Application>, then Total Rating, and click **Insert**.

9. Click the **Insert Operator** button and choose Divide.

10. Click the **Insert Field** button again.

11. Choose Job Application>, then Number of Reviews, and click **Insert**. Your formula should look like this: **Total_Rating__c / Number_of_Reviews__c**

12. Click **Next**.

13. Accept the defaults in the remaining steps of the wizard → Click **Save**.

→ That wraps up all the fields and relationships we need to manage our reviews. Let's quickly organize the presentation of our fields and then test everything we've created.

→ Try It Out: Customize the Review Object's Page and Search Layouts

→ First, let's update the page layout of the Review object so that the Assessment text field is in a single column section of the same name.

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

2. Click **Review**.

3. In the Page Layouts related list, click **Edit** next to Review Layout.

One to one relation between candidate and passport:

1) In the passport object create the required fields.

2) Make the candidate id (primary key) as foreign key in the child table (passport) using master detailed relation.

3) Create a roll-up summary field in the candidate table to maintain the passport count.

4) Apply the validation rule on the passport count. If passport count is greater than error message should be displayed like (already this candidate having passport choose another candidate)

Schema Builder:

→ It is used to show all the objects (both standard and custom) along with its relationships in the form of ER diagram.

Click **Setup → Build → Schema Builder**

→ In Schema Builder page following 2 options are available.

1. **Elements:** This option is available to create new objects, new fields, relationships between objects with Drag and Drop facility.
2. **Objects:** It provides all the list of Standard and Custom objects, its relationships in diagrammatic format.

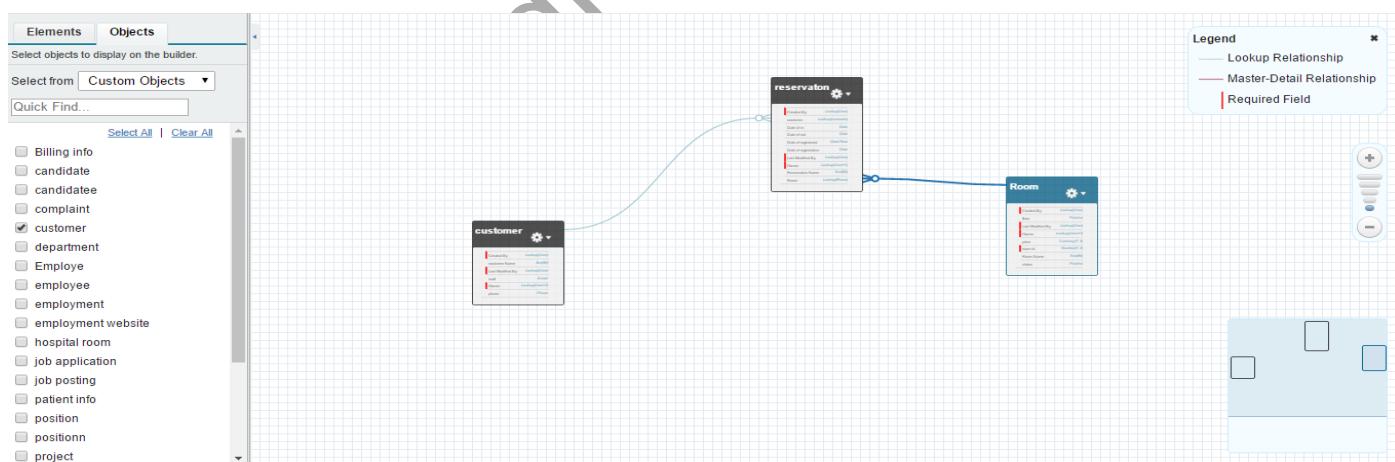
Note: Entity diagrams are displayed whenever the required objects are selected from the list. By selecting Auto Layout option , all the entity diagrams are arranged automatically in proper order on **Schema Builder base**

→ Schema Builder provides a dynamic environment for viewing and modifying all the objects and relationships in your app. This greatly simplifies the task of designing, implementing, and modifying your data model, or schema. Schema Builder is enabled by default.

→ This eliminates the need to click from page to page to find the details of a master-detail relationship or to add a new custom field to an object in your schema.

→ For example, if you're using Schema Builder to view the details of your schema, you can add a new custom object without leaving Schema Builder. The drag-and-drop interface lets you easily add a custom object or new field, and saves the layout of your schema any time you move an object.

→ You can view your existing schema and interactively add new custom objects, custom fields, and relationships, simply by dragging and dropping. Schema Builder automatically implements the changes and saves the layout of your schema any time you move an object. This eliminates the need to click from page to page to find the details of a relationship or to add a new custom field to an object in your schema.



→ Schema Builder provides details like the field values, required fields, and how objects are related by displaying lookup and master-detail relationships. You can view the fields and relationships for both standard and custom objects.

→ Schema Builder lets you add the following to your schema

- Custom objects

- Lookup relationships
- Master-detail relationships
- All custom and standard fields like

Auto Number, Formula, Roll-up Summary, Checkbox, Currency, Date, Date/Time, Email, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text, Text Area, Long Text Area, Rich Text Area and URL

Cross Object Formula field:

→ Cross object represents a table which is having indirect relation with other object. That means following diagram shows the cross object relation.



- Position Object is having direct relation with Job Application but Cross relation with Review.
- Job application details can be shared directly to the position and Review page layouts and vice versa [child record directly available in parent table]
- To display Position record on Review page layouts Cross object formula field is required.

Note: by default parent object records will be displayed in child object's page layout and child objects name field is displayed on parent objects page layout

Cross object formula field Steps:

Step1: Select Reviews tab → select Quick access menu → New field

Step2: Select formula field type → click Next

Step3: Give field label (Eg ; position review) → (Text) as return type → Next

Step4: Advanced Formula tab → Insert field → Select Review → Select Job Application → Position → PositionName → Insert

Formula : JobApplication__r.position__r.Name

Note: "r" means related field.

Step 5: Select Visible → Next → Save

Note: Cross Object formula fields can be applied on any Object which is having indirect relation with another object.

What is a cross-object formula:

→ A Cross Object Formula is one that references data in a related record. For instance, I could create a formula field on opportunity to display the account's phone number.

Opportunity Owner	John Copperedge [Change]
Private	<input type="checkbox"/>
Opportunity Name	United Oil Office Portable Generators
Account Name	United Oil & Gas Corp
Account Phone	(212) 842-5500

→ When the account's phone number gets updated, the field on opportunity automatically reflects the change.

→ What's important to know about formulas?

→ Formula fields are read-only (the same is true for roll-up summary fields) for all users. For this reason, formula fields will not be displayed when editing records. The value of the formula is only calculated after the record is saved. This applies to cross-object formulas as well. For instance, you can easily display the account's phone number on the opportunity, but you cannot edit the phone number without returning to edit the account record.

How do you create a formula field:

Simply create a new field, and select field type “Formula” → Then enter the return type and syntax.

The screenshot shows the Salesforce formula creation interface. At the top, there are three radio button options: 'None Selected', 'Auto Number', and 'Formula'. The 'Formula' option is selected and highlighted with a red box. Below this, there are input fields for 'Field Label' and 'Field Name'. Under 'Formula Return Type', there is a list of data types with examples:

- None Selected
- Checkbox: Calculate a boolean value. Example: `(TODAY() > CloseDate)`
- Currency: Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: `Gross Margin = Amount - Cost__c`
- Date: Calculate a date, for example, by adding or subtracting days to other dates. Example: `Reminder Date = CloseDate - 7`
- Date/Time: Calculate a date/time, for example, by adding a number of hours or days to another date/time. Example: `Next = NOW() + 1`
- Number: Calculate a numeric value. Example: `Fahrenheit = 1.8 * Celsius__c + 32`
- Percent: Calculate a percent and automatically add the percent sign to the number. Example: `Discount = (Amount - Discounted_Amount__c) / Amount`
- Text: Create a text string, for example, by concatenating other text fields. Example: `Full Name = LastName & " " & FirstName`

At the bottom, there are tabs for 'Simple Formula' and 'Advanced Formula', with 'Advanced Formula' being the active tab. A large red arrow points from the 'Advanced Formula' tab to the 'Cross Object Formulas' section below. This section contains two dropdown menus: 'Opportunity >' and 'Account >'. The 'Account' dropdown is expanded, showing options like 'Account ID', 'Account Phone', 'Amount', 'Campaign ID', 'Closed', 'Close Date', 'Commission', and 'Created By'.

Simple & Advanced Formula Editors: When editing formula syntax, there are two types of editors. The simple editor does not provide access to cross-object formulas or functions, it is recommended using the Advanced Formula editor, which exposes cross-object

Data Management

→ Salesforce provides following data management services on huge data.

1. Export data
2. Import data Using Data import wizard
3. Mass delete
4. Mass update

Exporting data from Salesforce:

- This option will prepare a copy of all the organisation data which is available in salesforce.com and this data will be exported either manually or schedule it to run automatically.
- When the export is ready for download that user will receive an email containing a link that allows you to download the files.
- The export files are also available on this page (**in salesforce.com**) for 48hours and after that they will get deleted automatically

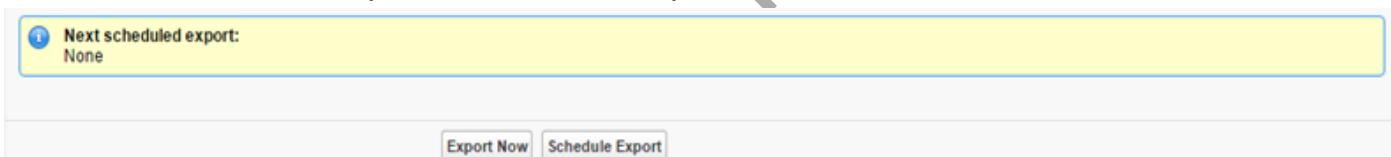
Steps to export the data:

Step1: Setup → Administer → Data management → Data export



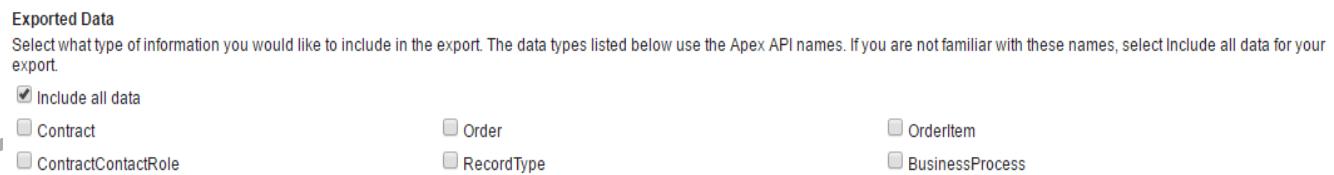
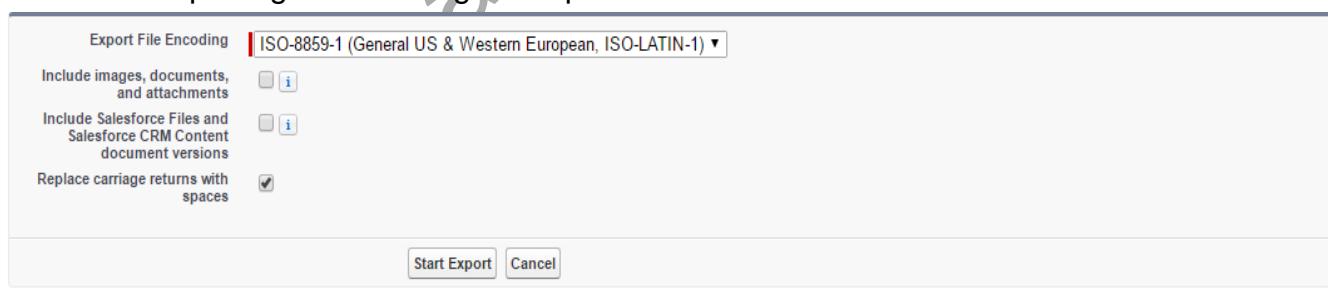
Step 2: Select either Export now or Schedule export

- Export now is for immediate backup.
- Schedule export is for Auto backup based on date and time.



Step3: If Export now is selected → select type of exporting → select required objects → start

Note : Data Exporting is like taking backup from the database.



Import Data into salesforce: salesforce gives the provisioning to import the existed data into Salesforce.com website (in its internal DB). This can be done in 2 ways.

1. Using Data import wizard
2. Using DataLoader

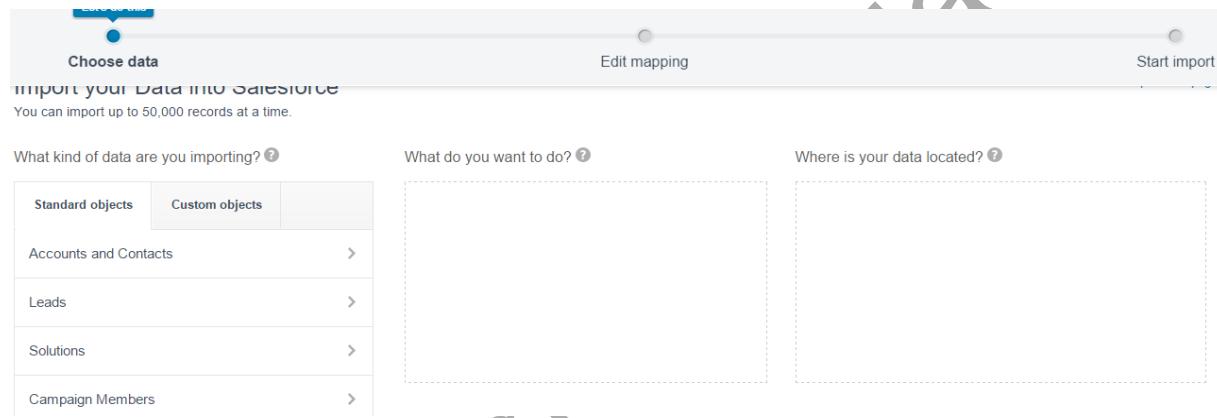
Data import wizard: By using this option maximum 50,000 records can be imported at a time.

Step1: Make the data ready in the computer in .csv format.

Step2: Setup → Data Management under Administer panel → Data import wizard



Step3: Click Launch Wizard



Step4: Select required object in Col1 (Standard or Custom objects)

Step5: Select Add new records in col2

Step6: Click on CSV in col3 → choose .csv file (which was already created) → Next

Step7: Map the field names of Salesforce Object and CSV file → Next(Use the drop-down lists to specify the Salesforce fields that correspond to the columns in your import file. For your convenience, identically matching labels are automatically selected)

Note: Unmapped fields will not be imported

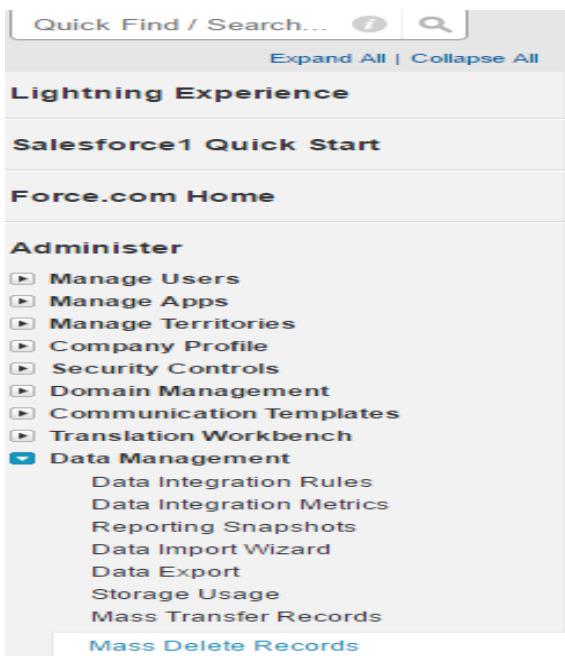
Step8: Click Start import.

Note: To view all the imported records, select the related tab → click GO(Once the import operations have completed, return to the Positions, Candidates, or Job Applications tab and click Go! next to the View drop-down list. You'll see a list of all the new records you just imported)

Mass delete:(only on standard tables)

→ If you or another user imported records incorrectly into Salesforce, you can use the mass delete feature to remove these records.Undo Imports with Mass Delete Recommendations

goto setup → expand Data management → select mass delete records



Mass Delete Records

- Mass Delete Accounts
Delete multiple accounts at one time
- Mass Delete Leads
Delete multiple leads at one time
- Mass Delete Activities
Delete multiple activities at one time
- Mass Delete Contacts
Delete multiple contacts at one time
- Mass Delete Cases
Delete multiple cases at one time
- Mass Delete Solutions
Delete multiple solutions at one time
- Mass Delete Products
Delete multiple products at one time
- Mass Delete Reports
Delete multiple reports at one time

Summary:

- To remove account or contact records that were imported, we recommend that you mass delete accounts first. This will also delete all new contacts associated with those accounts. You can then mass delete the newly imported contacts not associated with a new account. Restrictions Consider the following when using mass delete.
- Only administrators and users with the “Modify All Data” permission can mass delete records.
- You can only mass delete contacts, accounts, leads, and solutions that were added during import. Existing records that were merely updated during import will not be deleted or cleaned up.
- Mass delete does not remove notes that were added to existing records during import.
- Undoing an import with Mass Delete is based on the creation time of the new records and the alias of the user who did the import. Because of this, Mass Delete may also find records that were created manually by that same user during the same time period.
- You can only mass delete 250 records at a time. For larger imports, you can run multiple batches for the same type of record. Instructions
- Find out the beginning and ending times for the import that you want to delete. To do this, find a record that was created during the import and has not been modified since that time. Get the time and date in the Created By field; for example: 1/11/2009 4:37 PM. Subtract a minute or two to get the beginning import time and add a minute or two to get the ending import time. (There is no way to get the exact times.) If the beginning and ending import times are the same (for instance, with a small import), subtract a minute from the beginning time and add a minute to the ending time.
- From Setup, enter Mass Delete Records in the Quick Find box, then select Mass Delete Records, and then select the appropriate record type. (For account/contact imports, remember to mass delete accounts first.)
- Enter the search criteria based on the beginning and ending import times and the alias of the user who did the import
- Click Search.

Note: It is recommended to perform mass deletion, updation, import and export operations using Data Loader

Data Loader: It is used to perform Mass insertion, mass update, mass delete, mass upsert, import, export and export all operations on huge no. of records. (No limit on records).

Step1: Setup → Data management under Administer panel → Data Loader

Step2: Download Data loader software from given link.

Data Loader

Help for this page

Data Loader is a client app for the bulk import and export of data. With data in a comma-separated values (CSV) file, Data Loader can create, edit, or delete Salesforce records for any standard or custom object. Data Loader exports Salesforce records into CSV files. You can then edit those CSV files or use them as templates for importing data into Salesforce.

[Download Data Loader for Windows](#)

[Download Data Loader for Mac](#)

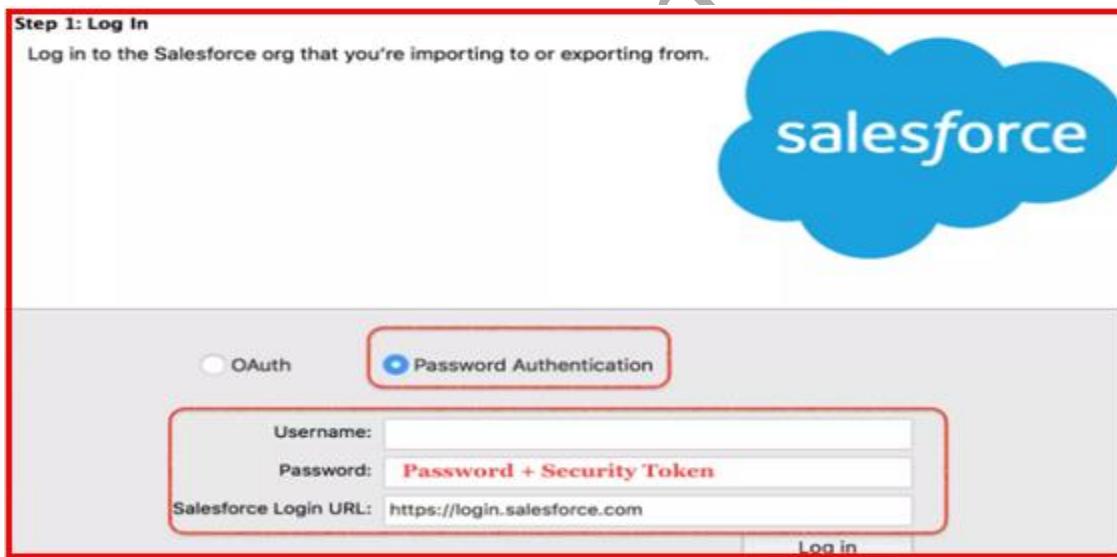
Step3: Open Dataloader from Run command there INSERT(import), UPDATE, UPSERT, DELETE, EXPORT and EXPORTALL options are available.

Note: It's very mandatory to install JDK8 software before installing Data Loader

Step4: While working with Data loader for 1st time, it is mandatory to login by selecting Password Authentication.

User name → Salesforce username

Password → Salesforce password + security token



Step5: Generation of Security token

In force.com → select profile name (user name) → My settings → personal (on left side) → Reset My Security Token → reset security token

Note: Security token will be sent to registered mail id.

My Settings

Personal

- Personal Information
- Change My Password
- Language & Time Zone
- Grant Account Login Access
- My Groups

Reset My Security Token

OAuth Password Authentication

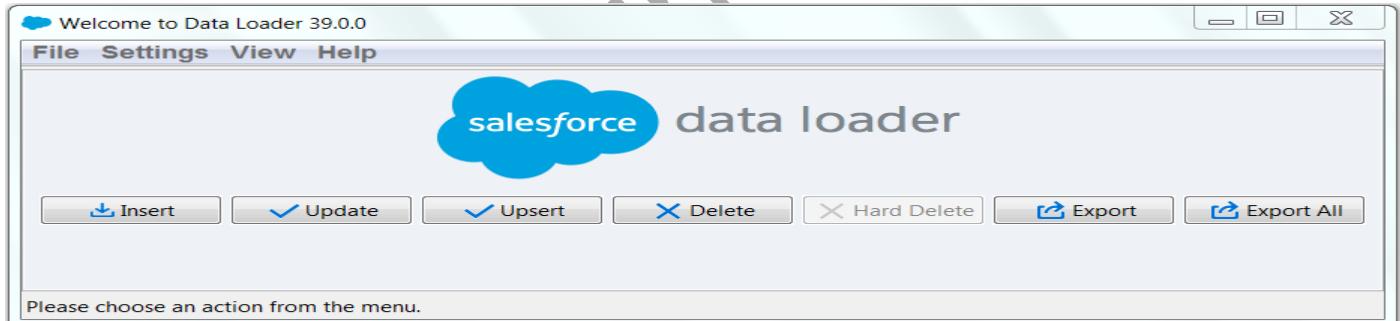
Username: sunilsf@sfdc.com

Password: [REDACTED]

Salesforce Login URL: https://login.salesforce.com

Log in

Step6: Provide password and token in Authenticated location → login → Next



Mass Insertion(import):

Step1: Select required object from the list → browse the CSV file, so that those records will be stored or inserted → click Next → click OK

Step2: Map the columns as shown below.

Click create/Edit a map → select Auto match fields to columns, If any field is not mapping drag and drop manually.

Select Salesforce object:

Show all Salesforce objects

- Account (Account)
- Automated Test Run (Automated_Test_Run_c)
- Books (Books_c)**
- Build (Build_c)
- Case (Case)
- Contact (Contact)
- Customer (Customer_c)
- Event (Event)
- f1 (f1_c)
- f2 (f2_c)
- f3 (f3_c)
- Invoice statement (Invoice_statement_c)

Choose CSV file:

Mapping Dialog

Match the Salesforce fields to your columns.

Name	Label	Type
OwnerId	Owner ID	reference

Drag the Salesforce fields down to the column mapping. To remove a mapping, select a row and click Delete. 

File Column Header	Name
Author_c	Author_c
ISBN_c	ISBN_c
Name	Name
price_c	price_c
Publisher_c	Publisher_c
Title_c	Title_c

Step3: To remove the mapping, click clear mapping → click OK → Next → browse a directory where all the success and error files will be saved → Finish.

Note: Follow the above steps for Mass delete, Mass update, Mass Upsert operations on both Standard and Custom objects.

Reports and Dashboards:

→ While a comprehensive set of reports is included with every organization to provide information about standard objects, such as contacts and accounts, we can also build custom reports that highlight interesting metrics about the data stored in our custom objects.

→ These are the set of records displayed to the enterprise users in a structured format so that companies can analyze their business.

→ Salesforce supports Auto generation of reports and these depend on following 5 categories.

1) Report type: represents an Object for which report is required.

2) Fields: represents columns of an Object , these can be drag and dropped based on requirement.

3) Filters: It represents conditions used to filter the records in the reports, these are categorized in to following 4 types.

a. **Field filter:** It is used to add the condition based on the field.

b. **Filter logic:** It is used to combine more than 2 conditions using logical AND , logical OR.

c. **Cross filter:** It is used to display the records of one table which is having relation with other table.

d. **Row limit:** It is used to filter the records based on no. Of records either in ASC or DESC order.

Sample Report

The screenshot shows a Salesforce report interface for 'Positions Open Longer Than 90 Days'. At the top, a red box highlights the header: 'Reports include a table of data with optional data filters, groupings, and a customized graph.' Below the header, there are 'Optional data filters' for time frame and location. A 'Table of data' section displays a list of positions with columns for Position Title, Owner Name, Days Open, Hire By, Open Date, and Status. Red arrows point from the 'Optional data filters' box to the time frame and location dropdowns. Another red arrow points from the 'Table of data' box to the 'Optional groupings' section, which shows various grouping levels like Location, Functional Area, and Account Executive. A final red arrow points from the 'Table of data' box to the 'Optional graph' section, which features a pie chart titled 'Positions Open Longer Than 90 Days' showing record counts for different locations.

Position Title	Owner Name	Days Open	Hire By	Open Date	Status
Sr. Developer	Cynthia Capobianca	126	5/3/2010	2/2/2010	New Position
Functional Area: Human Resources	Cynthia Capobianca	125	5/4/2010	2/3/2010	New Position
Benefits Specialist	Cynthia Capobianca	1,221	5/8/2007	2/3/2007	New Position
Functional Area: Information Technology	Cynthia Capobianca	1,222	5/7/2007	2/2/2007	New Position
Documentation Writer	Cynthia Capobianca	1,223	5/6/2007	2/1/2007	Open - Approved
Sr. SOA Engineer	Cynthia Capobianca	1,224	5/3/2007	4/23/2007	Open - Approved
BWY Engineer	Cynthia Capobianca	1,225	5/6/2007	2/1/2007	Open - Approved
Sr. UI Designer	Cynthia Capobianca	1,226	5/3/2007	4/23/2007	Open - Approved
Grand Totals (10 records)					

FOR MORE DETAILS CONTACT. rnrudayitschool@gmail.com, PHONE. +91 9000175174

Visit: www.facebook.com/groups/rnreddytechsupports

4)Report Formats: It represents format of the report and these are categorized into following 4 types.

Tabular reports: these are the simplest and fastest way to look at your data. Similar to a spreadsheet, they consist simply of an ordered set of fields in columns, with each matching record listed in a row. While easy to set up, they can't be used to create groups of data or graphs.

Tip: Use tabular reports when you want a simple list or a list of items with a grand total.

Summary reports: these are similar to tabular reports, but also allow users to group rows of data, view subtotals, and create charts. For example, in the sample Employee Interviewer reports that appear in the following screenshot, the summary report groups the rows of reviews by the possible values of the Owner Name field, allowing us to see at a glance subtotals of how many times the two interviewers have talked to candidates and entered reviews for them.

→While a little more time-consuming to set up, summary reports give us many more options for manipulating and organizing the data, and, unlike tabular reports, they can be used in dashboards.

Tip: Use summary reports when you want subtotals based on the value of a particular field or when you want to create a hierarchically grouped report, such as sales organized by year and then by quarter.

Matrix reports: allow you to group records both by row and by column. For example, in the following sample Employee Interviewer reports, the matrix report groups the review rows by the possible values of the Owner Name field, and also breaks out the possible values of the Position field into columns. Consequently, the report gives us summarized information such as the number of times an interviewer has interviewed candidates and entered reviews for a particular position. These reports are the most time-consuming to set up, but they also provide the most detailed view of our data. Like summary reports, matrix reports can have graphs and be used in dashboards.

Tip: Use matrix reports when you want to see data by two different dimensions that aren't related, such as date and product.

Joined reports: let you create different views of data from multiple report types. In a joined report, data is organized in blocks. Each block acts like a "sub-report," with its own fields, columns, sorting, and filtering. You can add a chart to a joined report. For example, in the following sample, the joined report pulls data from two report types related to the Positions object. Together, the report shows applications received from job ads posted for each position.

Tip: Use joined reports to group and show data from multiple report types in different views.

5)Folders: It represents a private or public folder where the reports can be saved, these are categorized into following two types

- My personal Custom Reports
- Unified public Reports

Setting Up the Recruiting App for Reports:

→Before we get started building reports, we first need to take care of a couple tasks that will make our reports easy to find in the Recruiting app.

→ Add the Reports tab to the default tab display along with our Positions, Candidates, and Job Applications tabs.

→ Create a folder for storing all the reports that we create.

Note: Both of above two tasks are purely optional.

Add the Reports Tab

- ➔ Add the Reports tab to the set of default tabs that are displayed for every Recruiting app user.
Setup → enter Apps in the Quick Find box, then select Apps → Click Edit next to the Recruiting app → In the Choose the Tabs section, add Reports to the Selected Tabs list.
- ➔ Optionally, select Overwrite users personal custom app customizations, if you choose this option, the Reports tab is automatically added to the tab bar by default for all users → Click Save.

Create a Recruiting Reports Folder

- ➔ On the Reports tab, you see recently viewed reports and dashboards organized in report or dashboard folders.

Unfiled Public Reports is a standard folder all users can access. As an administrator, you can store reports in that folder to share with everyone in your organization. You can make any other folder public, by sharing it with all users.

Personal folders such as Personal Custom Reports and Personal Dashboards are an exception. They contain reports or dashboards private to each user and can't be accessed by others.

The Reports Tab and Folders

Tabular reports can't be used to create graphs or group data

Review: Created Date	Job Application: Candidate	Job Application: Position	Job Application: Status
6/10/2010	C-00001	Benefits Specialist	Phone Screen
6/10/2010	C-00008	Documentation Writer	Rejected
6/10/2010	C-00012	Sr. UI Designer	Extend an Offer
6/10/2010	C-00009	DBA	Rejected
6/10/2010	C-00014	Sr. Benefits Specialist	Hired
6/10/2010	C-00017	Inside Sales Rep.I	Hired
6/10/2010	C-00008	Sr. Benefits Specialist	Phone Screen
6/10/2010	C-00003	Documentation Writer	New
6/10/2010	C-00008	Documentation Writer	Schedule Interviews

Summary reports allow you to create a graph and group rows of data

Matrix reports allow you to create a graph and group both rows and columns of data

Reviewer: Owner Name	Job Application: Position				Grand Total
	Benefits Specialist	DBA	Documentation Writer	Inside Sales Rep.I	
Cynthia Capobianca	1	1	1	1	4
Dave Carroll	8	0	1	1	10
George Abitbol	1	0	1	0	2
Grand Total:	9	1	2	1	13

Joined reports let you group different views of data from multiple report types and create a graph.

The screenshot shows the Salesforce Reports & Dashboards page. On the left, there's a sidebar titled 'Folders' with a search bar and a list of 'All Folders' containing items like 'Untitled Public Reports', 'My Personal Custom...', 'My Personal Dashboard...', 'Recruiting Reports' (which is highlighted), 'Account and Contact...', 'Opportunity Reports...', 'Sales Reports...', 'Lead Reports...', 'Support Reports...', 'Campaign Reports...', and 'Administrative Reports...'. On the right, there's a main pane titled 'All Folders' with a search bar and a list of reports. A tooltip box with a red border and white text is overlaid on the 'Recruiting Reports' folder in the sidebar, stating 'Reports are organized in report folders for easy access.' Below the sidebar, there's a message: 'or without requiring any sharing or security configuration'.

→ To let users access your reports, make the folder that stores the reports accessible to them. Let's create a folder to organize reports that your users can find easily.

→ In the Reports tab, click next to the Folders pane and choose New Report Folder.

→ In the Report Folder Label field, enter Recruiting Reports. Folder Unique Name autopopulates with Recruiting_Reports. Leave this default value → Click Save.

→ Next to the Recruiting Reports folder, click and select Share.

Note: If you don't see the Share option, you just need to turn on folder sharing. From Setup, enter Folder Sharing in the Quick Find box, then select Folder Sharing, and make sure Enable access levels for sharing report and dashboard folders is selected.

→ You can share all of the contents of a report folder by selecting one of the options at the top of the dialog: Users, Roles, Roles and Subordinates, or Public Groups. We want everyone at organization to be able to see, but not change, the reports in this folder.

→ Click Roles and Subordinates → Next to CEO, click Share.

→ Make sure that the level selected in the Access column is **Viewer**. This allows all users in your company to view this folder and the reports in it, but allows only administrators to modify the reports inside the folder or add new reports to it.

Click Done to save our settings, and then click Close.

Create a Summary Report

→ To create our summary report, we'll start by opening the report builder, a powerful visual editor for reports → On the Reports tab, click **New Report**.

→ A report type defines the set of records and fields available to a report based on the relationships between a primary object and its related objects.

→ From the Create New Report page, double click on the Other Reports category.

The Other Reports Category in the Create New Report Page



→ Objects that have a many-to-one relationship with another object, like Job Applications and Positions, can either be selected on their own or in the context of their relationship with the other object.

Analyzing Data with Reports and Dashboards:

Select Positions → Click Create → Click Run Report.

Adding a Grouping for a Report

This screenshot shows the 'Adding a Grouping for a Report' configuration screen. On the left, the 'Fields' pane lists various position-related fields. A red arrow points from the 'Functional Area' field in this pane to a callout box in the 'Preview' section. The callout box contains the text: 'Drag the Functional Area field to create a grouping.' The 'Preview' section shows a list of positions grouped by functional area.

Position: Position Title
Sr. Benefits Specialist
Sr. Developer
Recruiter
Sr. Developer
Benefits Specialist
Documentation Writer

→ Say we want to see positions also grouped by region. While the Location field gives us city and state, we want to group data geographically by regions, like USA, UK, and Asia Pacific. By categorizing the location field into buckets, we get a field that can be used for the grouping.

1. Drag Location from the Field pane into the preview after Position Name.
2. Click on Location, and select **Bucket this Field**
3. Type Region in the Bucket Field Name.
4. Click **New Bucket**, type country name, and press Enter.
5. Select: cities Click **Move To**, and from its drop-down select country name
6. Click **New Bucket**, type another country name, and press Enter.
7. Add the related cities → Click **OK**.

Add Columns and Filters

→ In report builder, drag the following fields into the preview.

- Hiring Manager
- Status

→ You can also double-click fields to add them to the end of the report.

→ Reorder columns by dragging them. When you're done, the order should be:

Position Title, Location, Hiring Manager

Adding a Column Using Drag-and-Drop

The screenshot shows the Salesforce Report Builder interface. On the left, there's a sidebar with various fields listed under 'Position'. In the center, there's a preview area with columns for 'Position: Position Title' and 'Location'. Below the preview, there's a list of records. A red arrow points from the 'Hiring Manager' field in the sidebar to its position in the preview area.

Position: Position Title	Location
Functional Area: Finance (1 Record)	
Region: USA (1 Record)	
Senior Analyst	San Francisco, CA
Functional Area: Human Resources (2 Records)	
Region: USA (2 Records)	
Sr. Benefits Specialist	San Francisco, CA

→ In the **Show** drop-down, select All Position → Click Add → Field Filter.

→ Define a filter for Status equals New Position, Pending Approval, Open Approved → Click OK.

Tip: Notice that whenever you choose a checkbox field or a picklist field, like Status, in your filter, a lookup icon (🔍) shows up next to the filter row. Click the icon to view valid values for that field and quickly insert the ones by which you want to filter.

→ Using this filter of Status equals New Position, Pending Approval, Open - Approved means that our report will include only those position records with one of these three statuses.

Adding a Grouping for a Report

The screenshot shows the Salesforce Report Builder interface. On the left, there's a sidebar with various fields listed under 'Position'. In the center, there's a preview area with a grouping section. A red arrow points from the 'Functional Area' field in the sidebar to its position in the preview area, where it has a callout box saying 'Drag the Functional Area field to create a grouping.'.

→ Say we want to see positions also grouped by region. While the Location field gives us city and state, we want to group data geographically by regions, like USA, UK, and Asia Pacific. By categorizing the location field into buckets, we get a field that can be used for the grouping.

8. Drag Location from the Field pane into the preview after Position Name.
9. Click on Location, and select Bucket this Field

10. Type Region in the Bucket Field Name.
11. Click **New Bucket**, type country name, and press Enter.
12. Select: cities Click **Move To**, and from its drop-down select country name
13. Click **New Bucket**, type another country name, and press Enter.
14. Add the related cities → Click **OK**.

Add Columns and Filters

- In report builder, drag the following fields into the preview.
- Hiring Manager
 - Status
- You can also double-click fields to add them to the end of the report.
- Reorder columns by dragging them. When you're done, the order should be:
- Position Title, Location, Hiring Manager

Adding a Column Using Drag-and-Drop

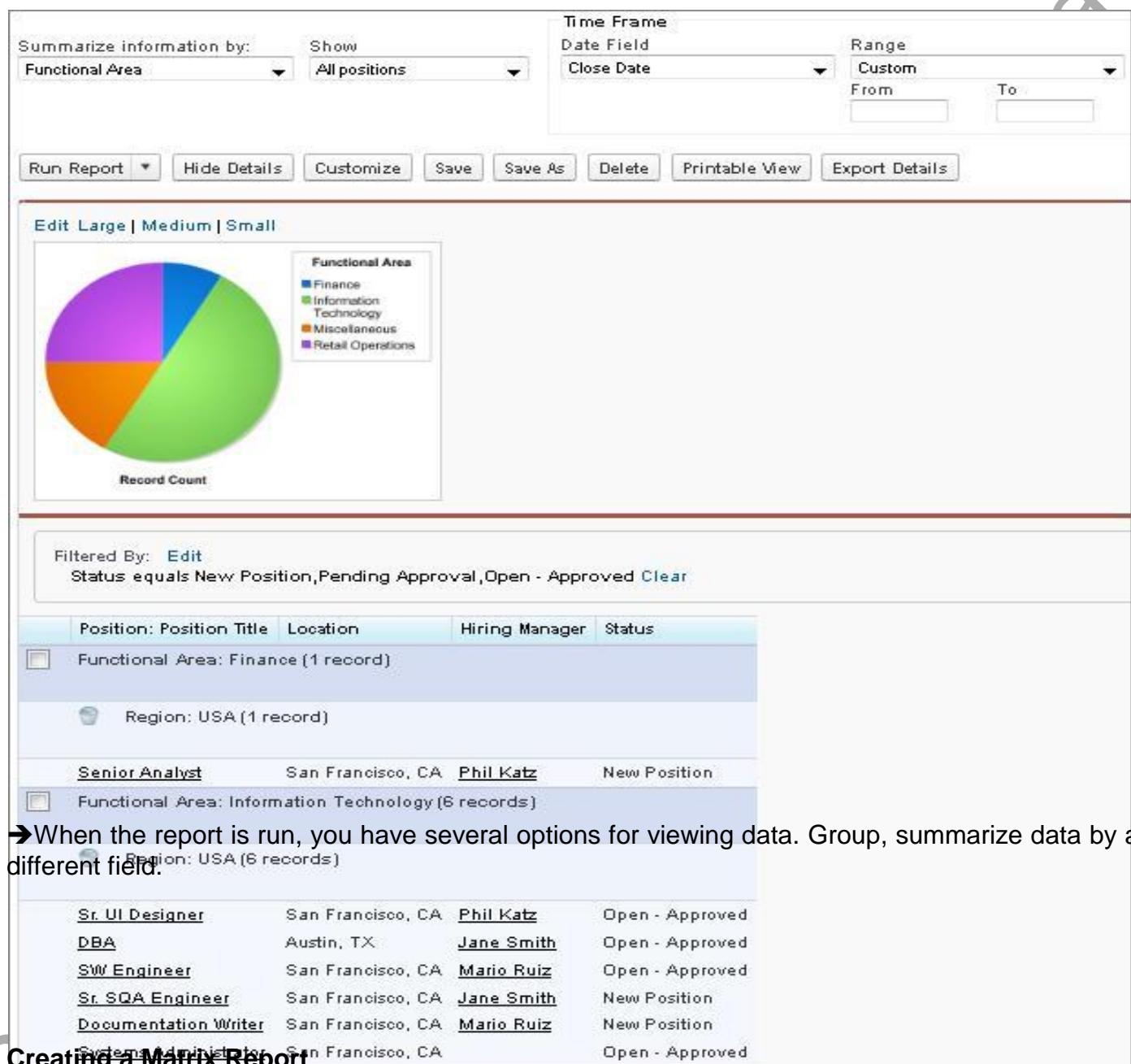


- In the **Show** drop-down, select All Position → Click Add → Field Filter.
- Define a filter for Status equals New Position, Pending Approval, Open Approved → Click OK.
- Tip:** Notice that whenever you choose a checkbox field or a picklist field, like Status, in your filter, a lookup icon () shows up next to the filter row. Click the icon to view valid values for that field and quickly insert the ones by which you want to filter.
- Using this filter of Status equals New Position, Pending Approval, Open - Approved means that our report will include only those position records with one of these three statuses.
- Note that the comma between the three Status values is treated as an OR function, so this one filter is the same as using these three filters, status equals New Position **OR** status equals Pending Approval **OR** status equals Open-Approved

Add a Pie Chart:

- The final step is to display a chart with the report. In our case, we want a pie chart.
- Click Add Chart and choose the pie chart type → Click **OK**.

Summary Report Showing Open Positions by Region and Functional Area



→ When the report is run, you have several options for viewing data. Group, summarize data by a different field.

Creating a Matrix Report

- To create the matrix report, we'll use the report builder again, this time highlighting steps that are different from how we defined the summary report.
- In the Reports tab, click **New Report**. To count position records.

- From the list, click the “+” to expand Other Reports → Select Positions, and click **Create** → From the Format drop-down, select Matrix.

Specifying Groupings in a Matrix Report

		Grand Total
		Position: Position Title
Record Count		1 Developer
Record Count		1 Sr. Benefits Specialist
Record Count		1 Sr. UI Designer
Record Count		1 Inside Sales Rep I
Record Count		1 DBA
Record Count		1 SW Engineer
Record Count		1 Sr. SQA Engineer
Record Count		1 Documentation Writer
Record Count		1 Account Executive I
Record Count		1 Account Executive II
Record Count		1 Account Executive III
Record Count		1 Account Executive IV
Record Count		1 Recruiter
Record Count		1 Technical Writer
Record Count		1 Editor
Record Count		1 QA Lead
Record Count		1 API Writer
Record Count		1 Web Developer
Grand Total	Record Count	18

This preview shows a limited number of records. Run the report to see all results.

- Group by both rows and columns. Notice the two sets of drop zones for matrix reports.
 → From the Fields pane, drag Position: Owner Name to the row grouping drop zone.
 → Now, drag Travel Required to the column grouping drop zone. Our report now breaks out the possible values for the Travel Required field in the columns dimension

Add Summary Fields:

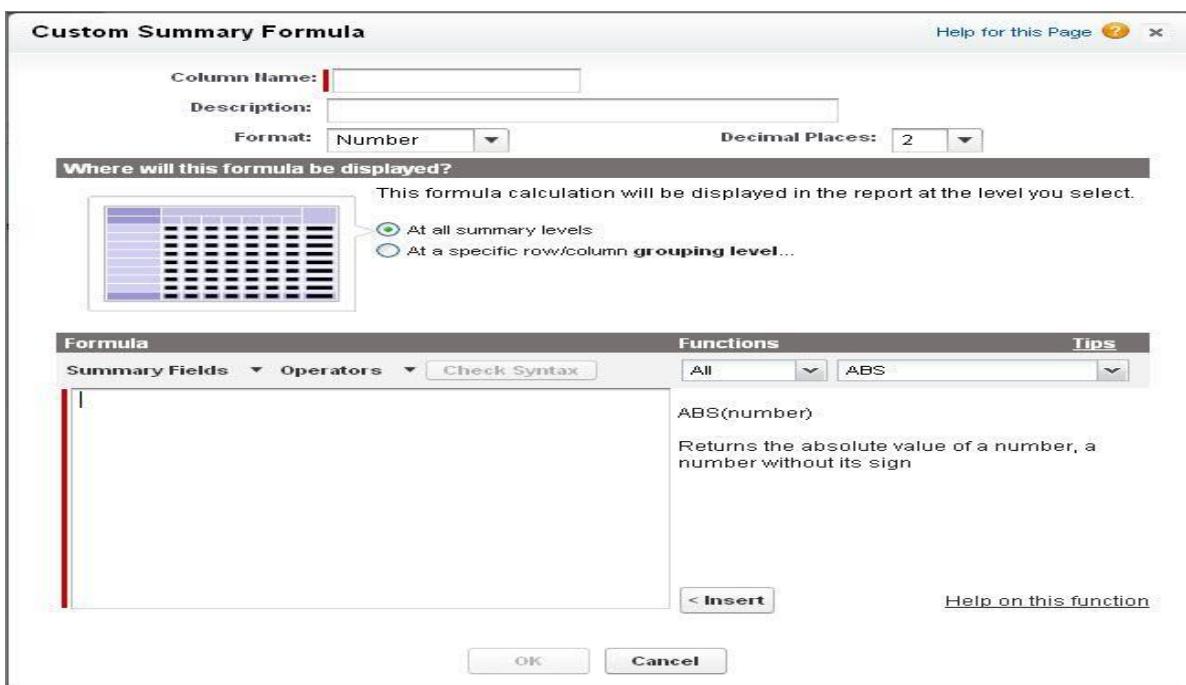
→ For our report, we need to include three different types of summaries: record count, average days open, and a formula that calculates the percentage of records requiring travel. While the first two are standard summary fields, the third will require a visit to the Custom Summary Formula editor. Let's start with the first two. By default, the report already adds Record Count, so let's add the average for the number of days a position stays open.

- Find the Days Open field and drop it into the matrix.
 → In the Summarize dialog, select Average.

Now, let's create that formula to calculate the percentage of records requiring travel.

Double-click **Add Formula**. You'll see the Custom Summary Formula editor.

The Custom Summary Formula Builder



→ The formula editor lets us define a new formula based on the summarizable fields in the report. In our case, we want to include a summary that shows the percentage of position records that require travel in any given segment. To make this calculation we need to divide the sum of records that require travel by the sum of all records :

1. In the Column Name field, enter Travel Required Percentage
2. In the Description field, enter The percentage of total position records that require travel.
3. In the Format drop-down list, choose Percent.
4. In the Decimal Places drop-down list, choose 0.
5. For Where will this formula be displayed?, choose At all summary levels.
6. Let's write our formula. Similar to other formula editors in the platform, this provides tools to make it easier.
7. In the Formula section, click **Summary Fields** and select Travel Required and select Sum.
8. The formula editor displays the following API representation of those values
Position__c.Travel_Required__c:SUM
9. Click the **Operators** drop-down and select **Divide** → Click **Summary Field** and select Record Count. The final formula looks like this:
Position__c.Travel_Required__c:SUM / RowCount
10. Click **Check Syntax** → Click **OK**.

Add Columns and Filters

Note: Before you can add fields to a matrix report, make sure Details is selected under the Show drop-down list. If details aren't shown, you can only add summary fields.

→ Add the following report columns by double clicking them, **Functional Area, Status, Position**

Position: Position Title, Days Open and Travel Required should already be part of your report. For our report, we want to define three filters: one to include all positions, one to include only those positions created in the last year, and one to include those with a Status of Open - Approved or Closed Filled.

1. In the Show drop-down list, choose All Positions.

2. In the Date Field filter select Position: Created Date

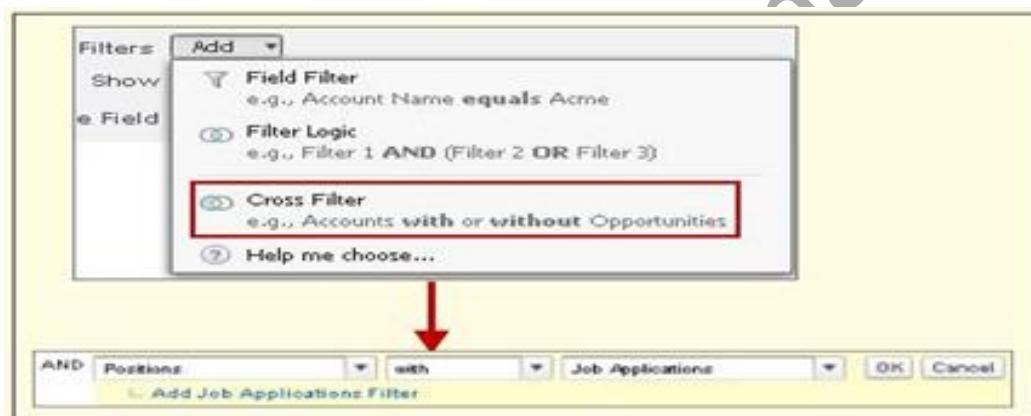
→ Notice that all other date fields defined on the Position object are also available in the Date Field filter, including Close Date, Hire By, and Open Date.

3. For **Range**, choose Current and Previous CY (meaning this and last calendar year). The start and end dates are populated automatically.

4. Add a field filter based on the status → Click **Add** → Create this filter.

5. Status equals Open - Approved, Closed – Filled → Click **OK**.

Adding a Cross Filter:



Introducing Dashboards:

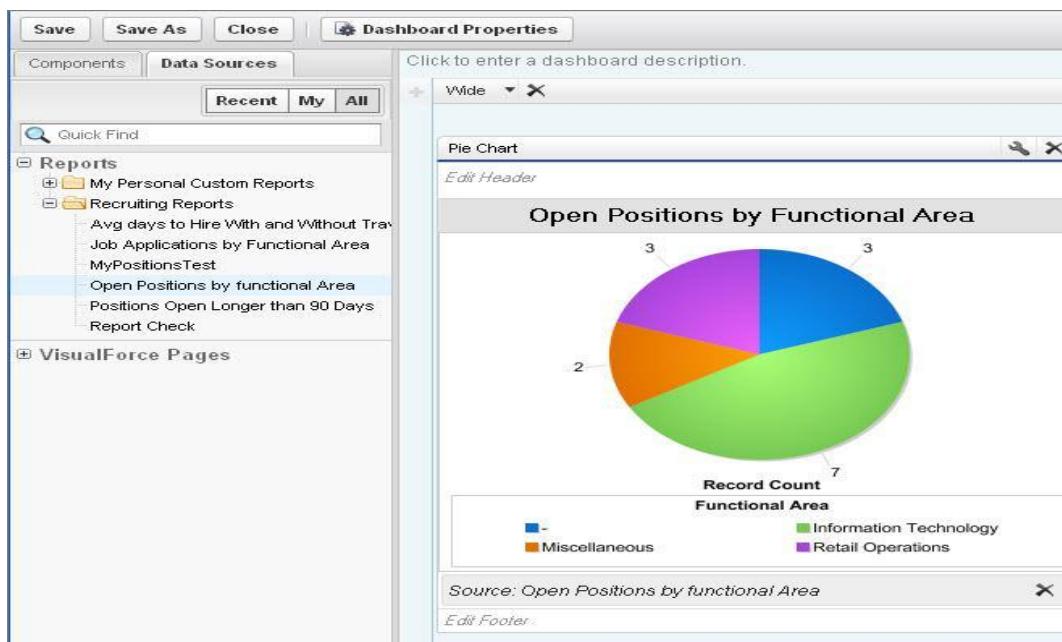
It is used to display the reports in chart format so that users can able to analyze the reports very easily.

Steps to create a new Dashboard:

1. Select Reports tab → click New Dashboard

The screenshot shows the 'Dashboard' creation interface. It features a 'Components' tab, a 'Data Sources' tab, and a 'Dashboard Properties' tab. A callout box points to the 'Components' tab with the text: 'The Component Tab contains the types of charts you can use to display report data. You can drag and drop a chart type onto any column.' Another callout box points to the 'Data Sources' tab with the text: 'Use the Data Sources tab to attach a report to each chart you drag onto the columns.' A third callout box points to the main dashboard area with the text: 'Dashboard display area. You can have up to three columns.' A red 'Fo' is visible in the bottom left corner, and a red 'ge 60' is in the bottom right corner.

2. Select Components tab → Drag & Drop one of the existing charts
3. Select Data sources tab → drag & drop down object from the (specified folder) on to the chart
4. Set the header & footer for the chart (optional).
5. Save the dashboard by clicking save → provide valid title → save



→ It is mandatory to maintain the groups while preparing the charts.

→ Max 3 charts can be created for 1 object.

Steps to add the Dashboard tab to application:

1. Set up → type Apps in Quick find box → Apps
2. Select Edit beside Application for which tab is required.
3. In Choose tabs select Dashboards and click Add → Save
4. By selecting Dashboards tab, user can view all the reports in chart format.

Note: Click Refresh whenever we want to refresh the chart. That means if any new modifications are there, it will be affected on chart.

Steps to enable Dashboard in Home tab:

1. Set up → Customize under Build → Home → Home page lay outs
2. Click Edit option in Default page lay out → enable Dashboard snapshot option → Next
3. Arrange components in required order → Save.

→ A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. Each dashboard can have up to **20** components. Users can view any dashboard available in a public folder in their organization, such as Company Dashboards, and can select a favourite, whose first three components display on the Home tab.

Sample Recruiting Dashboard

Filters [Add](#)

Show: **All positions**

Date Field: Position: Created Date Range: Current and Prior From: 1/1/2011 To: 12/31/2012

Status equals "Open - Approved, Closed - Filled"

Recruiting Dashboard

Help for this Page [?](#)

View Dashboard Type here to search for a dashboard... Edit Clone Refresh

Dashboards can hold up to 20 components in a two or three-column layout

A snapshot of open positions, job applications, frequent interviewers, and recruiter performance.

Job Applications by Functional Area



Position: Functional Area	Record Count
Human Resources	1
Information Technology	2

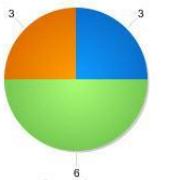
Positions Hired in Last 90 Days

Functional Area	Record Count
Human Resources	1
Retail Operations	1

Top Five Employee Interviewers

Review: Owner Name	Record Count
Cynthia Capobianca	9
Dave Carroll	2
George Abitbol	2

Open Positions by Functional Area



Functional Area	Record Count
Human Resources	3
Information Technology	6
Retail Operations	3

Positions Open Longer Than 90 Days



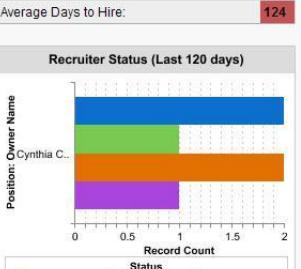
Record Count: 13

Recruiter Performance

Position: Owner Name	Average Days Open
Cynthia Capobianca	124

Average Days to Hire: 124

Recruiter Status (Last 120 days)



Status	Record Count
Phone Screen	~1.8
Extend an Offer	~0.8
Hired	~1.2
Rejected	~1.0

Workflow Rules (using Process Builder):

- ➔ When you create a process in the Process Builder, you start by choosing an object, for example, a Position. Then you tell the Process Builder what to evaluate when someone creates or changes a Position record
- ➔ With the Process Builder, you can execute a wide range of actions,
 1. Email Alerts
 2. Field Updations
 3. Assign Tasks
 4. Outbound messages

Adding an Action That Sends Email Alerts

- ➔ Just as the platform includes built-in tools for writing emails to users and contacts in your organization
- ➔ Email templates allow you to create form emails that communicate a standard message, such as a welcome letter to new employees or an acknowledgement that a customer service request has been received.
- ➔ To personalize the content of an email template, we can use merge fields to incorporate values from records that are stored in the system. For example, if we wanted to address an email recipient by their first name, we could write an email template “Dear {!Contact.FirstName},”
- ➔ In this example, {!Contact.FirstName} is a merge field that brings in the first name of the contact to whom the email is addressed
- ➔ For our email alert, we can build an email template to notify users of new positions that have been added to the system. We can use merge fields to include information from the position record, such as its title and the required skills. Let's go do that now, and then we can add the email alert action to our process.

Build an Email Template

- ➔ From Setup, enter Email Templates in the Quick Find box, then select **Email Templates**.
- ➔ Here you should see a list of all the email templates that have already been defined for your organization, including several sample templates from Salesforce ➔ Click **New Template**.
- ➔ We can choose to create a text, HTML, or custom email template. HTML and custom email templates are the same except that HTML templates allow you to specify a letterhead to give your email the same look and feel as other emails from the same source.
- ➔ To keep things simple, we'll stick with a plain-text email for now ➔ Select **Text**, and click **Next**.

Defining an Email Template

Edit Text Email Template

Recruiting App: New Position Alert

Use merge fields to personalize your email content. You can add substitute text to any merge field. Substitute text displays only if the merge record does not contain data for that field. Enter substitute text after a comma in the merge field, for example, {!Contact.FirstName,Sir or Madam}. When you save the template, the merge field will appear in the email body of the template with the following syntax: {!NullValue(Contact.FirstName,"Sir or Madam")}. Click on the link below to see a sample email template.

[View Sample Template](#)

Note that the Description field is for internal use only. It will be listed as the title of any email activities you log when sending mass email.

Available Merge Fields

Select Field Type	Select Field	Copy Merge Field Value
Position Fields	Position Title	{!Position__c.Name}

Copy and paste the merge field value into your template below.

Email Template Edit

Email Template Information

Folder: Unfiled Public Email Templates

Available For Use:

Email Template Name: Recruiting App: New Po

Template Unique Name: Recruiting_App_New_P

Encoding: General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Description: Send update email to all Universal Containers employees.

Subject: New Position Alert: {!Position__c.Name}

Email Body:

```
{!Position__c.Responsibilities__c}
Skills Required
{!Position__c.Skills_required__c}
Educational Requirements
{!Position__c.Educational_Requirements__c}

If you know of anyone great who might be able to fill this role, please
contact the hiring manager, {!Position__c.Hiring_Manager__c}
```

Required Information

Save **Save & New** **Cancel**

→ The New Template page lets us define the email template itself. The area near the top is where we'll generate the merge field codes for the fields in the email template below it, so let's skip past it for now and start with the Folder drop-down list.

→ In the Folder drop-down list, choose Unfiled Public Email Templates.

→ The Unfiled Public Email Templates folder is a standard, public folder available in every organization. By keeping the email template in a public folder, it'll be available to other users who have permission to view and edit email templates.

→ Select Available For Use. This option will make our email template available when we create our email alert action.

→ For Email Template Name, enter Recruiting App: New Position Alert.

Tip: To help keep your email templates organized, it's a good idea to preface any template name with the name of the app that uses it. Or, even better, you can create a public email template folder with the name of the app, such as Recruiting App Templates, and file all the relevant email templates in it.

→ Now we get to the heart of our email template—the email's subject and body text.

For Subject, enter New Open Position Alert:

→ We want to put the title of the new position in the subject of our email, so we'll need to use our first merge field here, just after the colon in our subject. To get the proper code, we'll have to go back to the merge field area near the top of the page.

- In the Select Field Type drop-down list, choose Position Fields.
- Although there are many objects to choose from in the Select Field Type drop-down list, because we're creating an email template for a workflow rule, we're limited to the fields for the object that will be associated with that workflow—in our case, Position. That's because the workflow rule that uses this email template won't know about any records other than the position record that triggered the workflow rule. If we put in fields from another object, they'd be left blank in our email.
- Now let's grab the field we want → In the Select Field drop-down list, choose Position Title.
- In the Copy Merge Field Value text box, a merge field code appears for Position Title. We can copy and paste it to the end of our subject line so the subject now looks like: New Open Position Alert: {!Position__c.Name}. When an email is generated from this template, {!Position__c.Name} will be replaced with the relevant position title.
- Now let's finish the remainder of our email. In the email body, enter the following text.

There's a new position open at our organization

Title: {!Position__c.Name}

Functional Area: {!Position__c.Functional_Area__c}

Location: {!Position__c.Location__c}

Job Description: {!Position__c.Job_Description__c}

Responsibilities: {!Position__c.Responsibilities__c}

Skills Required: {!Position__c.Skills_Required__c}

Educational Requirements: {!Position__c.Educational_Requirements__c}

If you know of anyone great who might be able to fill this role, please contact the hiring manager,

{!Position__c.Hiring_Manager__c}.

Thanks!

- Click **Save**.
 - That's it for our email template. Now that it's done, we just need to create the email alert that uses our new email template.
 - From Setup, enter Email Alerts in the Quick Find box, then select **EmailAlerts** → Click **New Email Alert**.
 - provide Description and unique name is auto populated
 - Select an Email template
 - In the Recipient Type Search field, choose Role and Subordinates.
 - In the Available Recipients list, select Role and Subordinates: CEO and click **Add** → Skip the remaining fields and click **Save**.
- Create a Process that Sends an Email**
- Go to the Process Builder and create a new process.
 - Enter New Position Notification for the process name. Press TAB to automatically enter the API name.
 - For the process description, enter Notifies all employees that a new position is available.

- For The process starts when, select **A record changes**, and then save the process.
- Use the Position object to start your process and start the process **when a record is created or edited**.
- Let's define our criteria so that it sends an email alert whenever a position record is open and approved.

Values for Creating the “New Position Notification” Criteria

Field	Value
Conditions	All of the conditions are met (AND)
Criteria for Executing	Conditions are met
Actions	
Criteria Name	Check for Open and Approved Status
Set Conditions	Position: Status equals Open - Approved
Advanced Option	Yes, execute actions only when specified changes are made to the record

→ Now we can add our Email Alerts action → In the IMMEDIATE ACTIONS area, click **Add Action**.

Select **Email Alerts**

→ enter Action Name → For Email Alert, enter Email New Position Alert and select the Email New Postion Alert → Click **Save**

Creating a Process That Updates Field Values

- Go the Process Builder and create a new process.
- Enter Assign Position to Recruiter for the process name. Press Tab to automatically enter the API name → enter description
- The process starts when, select **A record changes**, and then save.
- In the Set Conditions area: In the Field column select Position > Created By ID > Role ID > Name
- Click **Add Object** → Select **Position** for the object type → Queue for the criteria name → Leave the **Conditions are met** selected → Set the Operator column to Does not equal → In the Type column, select String → In the Value column enter Recruiter → Click Add Row.
- In the Field column select Position > Created By ID > Role ID > Name.
- Set the Operator column to Does not equal → In the Type column, select String → In the Value column enter Recruiting Manager → Click **Save**.

Creating a Process That Assigns Tasks

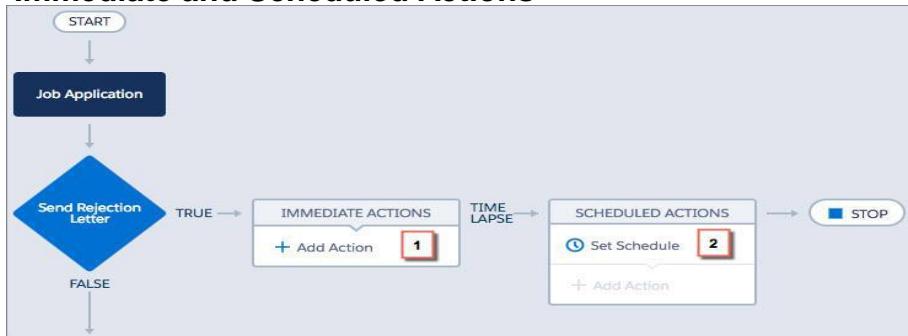
- From Setup, enter Process Builder in the Quick Find box, then select **Process Builder** → Click **New** → Name the process (Recruiter Tasks)
- For The process starts when, select **A record changes**, then click **Save**
- Let's start by creating our process and configuring what triggers the process to execute actions.
- Click **Add Object** and choose **Job Application** for the Object type. You can type in the Object field to filter the list of objects. For example, type Job to see objects that start with job → Click **Save** → Click **Add Criteria**.
- Enter Send Rejection Letter for the criteria name → For the criteria for executing actions, leave the selection as Conditions are met

→ In the Set Conditions area, click in the Field area to select a field on the Job Application object → Select **Status** and then click **Choose** → Leave the operator and type as **Equals** and **Picklist** → For the value, select **Rejected** → Click **Save**

Add a “Send Rejection Letter” Action to Your Process

→ To create a task and assign it to the owner of the Job Application record, you’ll add a **Create a Record** action to your process. When you add actions to a process, you have the option of creating immediate actions (1), which execute when the process is triggered, or you can schedule an action (2) to happen some time before or after an event, for example, one day before the created date, or three days after the last modified date.

Immediate and Scheduled Actions



- For now, we just need to define a single action that executes as soon as our criteria are met.
- Click **Add Action** in the Immediate Actions area (1).
- Select **Create a Record** → Enter Rejection Letter Task for the action name → Select **Task** for the record type. Remember, you can type to filter this list.
- Notice that when you select the Task record type, some fields automatically display with empty values. These are required fields for a Task record. You can also add values for other Task fields that aren’t required.
- For the Priority field, set the value to **High** → For the Status field, set the value to **Not Started**.
- For the Assigned To ID field, click in the Type area and select **Reference** and then click in the Value area to choose a field to reference

Reference a Field

Field *	Type *	Value *
Assigned To ID	Reference	<input type="text" value="Find a field..."/> <input type="button" value=""/>
Priority	Picklist	High
Status	Picklist	Not Started
+ Add Row		

- Select **Owner ID** and then click **Choose** → Let’s also add a subject to our task.
- Click **Add Row** → Select **Subject** for the field → Leave the Type as **String** and enter Send Rejection Letter for the value.

Let’s add a due date for our task

→ Click **Add Row** → Select **Due Date Only** for the field → Select **Formula** for the type → Enter [Job_Application__c].CreatedDate + 1 and click **Use this Formula** → Click **Save**.

Create an Approval Process

- The approval process contains approval steps and actions that we'll define later.
- From Setup, enter Approval Processes in the Quick Find box, then select **Approval Processes**.
- From the Manage Approval Processes For drop-down list, choose Position.
- There are two different wizards that we can use to create a new approval process
 1. Jump Start Wizard
 2. Standard Setup Wizard.
- The Jump Start Wizard sets several default values for us and only requires input for the most crucial fields: the approval assignment email template, filter criteria to enter the approval process, and the designated approvers.
- The Standard Setup Wizard, on the other hand, allows us to configure every possible option for our approval process. We'll stick with the latter for now so we can take a look at all of the options that are available.
- From the **Create New Approval Process** drop-down button, choose **Use Standard Setup Wizard** → In the Process Name field, enter Approve New Position.
- In the Description field, enter Ensure that a manager approves any position that his or her employee creates, and that any position with a minimum salary of more than \$150,000 is approved by the CEO → Click **Next**.
- After entering the name and description, our next step is to specify the conditions that determine which positions need approval.
- In the first row of filter criteria, select Current User: Role not equal to CEO → Click **Next**.
- From the Next Automated Approver Determined By drop-down list, select Manager.
- The Manager field is a standard field on the User object that designates the user's manager. The field establishes a hierarchical relationship between users, which prevents you from selecting a user that directly or indirectly reports to his or herself. This manager will be the designated approver for the first step of our approval process.
- Alternatively, you could have selected the Create New Hierarchical Relationship Field option in the drop-down list to define a new custom hierarchical relationship lookup field on the fly.
- The hierarchical relationship field type is specifically designed for the User object, and mimics the behavior of the standard Manager field by associating one user with another without indirectly associating that user to him or herself.
- For this approval process, though, the standard Manager field is perfect, so let's move on.

Specifying the Approver Field

The screenshot shows the 'Select Field Used for Automated Approval Routing' configuration page. It has two main sections: 'Select Field Used for Automated Approval Routing' and 'Record Editability Properties'. In the first section, 'Next Automated Approver Determined By' is set to 'Manager' and 'Use Approver Field of Position Owner' is checked. In the second section, there are two radio button options: 'Administrators ONLY can edit records during the approval process.' (selected) and 'Administrators OR the currently assigned approver can edit records during the approval process.' At the bottom are 'Previous', 'Save', 'Next', and 'Cancel' buttons, and the text 'Page 68'.

- Select the Use Approver Field of Position Owner checkbox.
- The Use Approver Field of Position Owner checkbox becomes editable when you select Manager in the Next Automated Approver Determined By drop-down list.
- When you select this checkbox, the approval request is routed to the user specified in the Manager field on the record owner's user record.
- If you don't select this checkbox, the approval request is routed to the manager of the user submitting the record. In our case, we want to obtain approval from the position owner's manager, so select this checkbox.
- In the Record Editability Properties area, choose Administrators ONLY can edit records during the approval process.
- Record editability allows you to specify whether a record that's been submitted for approval can be edited by the approver before being approved. Since we don't want managers to change the positions that a hiring manager or recruiter creates without alerting the owner, we'll only let administrators perform edits while a record is in our approval process → Click **Next**.
- In the Approval Assignment Email Template lookup field, select **Recruiting App: New Position Requires Approval** → Click **Next**.
- Our next step in defining the approval process is specifying which fields should be displayed on the Approval page layout, which the approver sees when he or she approves or rejects a record.
- Each approval process has its own page layout, and, unlike other page layouts, the Approval page layout can only be configured from within its approval process
- Move the following fields from Available Fields to Selected Fields.

Position Title, Owner, Hiring Manager, Type, Location, Hire By, Job Description, Min Pay, Max Pay

Defining the Record Approval Page Layout

The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.

Approval Page Fields

Available Fields		Selected Fields	
Created By	Add	Position Title	Up
Days Open	Remove	Owner	Down
Educational Requirements		Hiring Manager	
Functional Area		Type	
Java		Location	
JavaScript		Hire By	
Job Level		Job Description	
Last Modified By		Min Pay	
Open Date		Max Pay	
Record Type			
Responsibilities			
Skills required			
Status			
Travel Required			

Display approval history information in addition to the fields selected above.

Security Settings

Allow approvers to access the approval page only from within the salesforce.com application. (Recommended)

Allow approvers to access the approval page from within the salesforce.com application, or externally from a wireless-enabled mobile device. [?](#)

- On this page we can also specify whether approval history information should be displayed on the Approval page layout.
- This information shows whether this record was submitted for approval in the past, who the designated approvers were, and whether it was approved or rejected.
- Select Display approval history information in addition to the fields selected above → Click **Next**.
- The last page of the New Approval Process wizard allows us to choose who should be allowed to submit position records for approval. Again, we'll just leave the default Position Owner selected, because there's no reason for another user to have this power.
- The last two options on this page allow us to place the Approval History related list on all Position page layouts and give users the ability to recall pending approval requests after they've submitted them.
- The Approval History related list is the same history related list that we included on the Approval page layout, so we'll also include it on the Position detail page.
- From this related list users can also click the **Recall Approval Request** button to withdraw their pending approval requests.
- If we didn't enable this last option, only administrators would have access to the **Recall Approval Request** button.
- Select Add Approval History Related List to All Position Page Layouts → Select Allow submitters to recall approval requests → Click **Save**.

Profiles: It is set of permissions assigned to users, for one user only one profile should assign but one profile can be assigned to multiple users

Create the Recruiter Profile

- From Setup, enter Profiles in the Quick Find box, then select **Profiles**.

Standard Profiles

User Profiles

Below is a list of the profiles for your organization. Clicking on the profile link.

Action	Profile Name	User License	Custom
Edit	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit	Chatter Moderator	Chatter	<input type="checkbox"/>
Edit	Chatter User	Chatter	<input type="checkbox"/>

For custom profiles, you can edit any of the attributes. For standard profiles, you have to accept the permissions settings as they are.

- Create a new profile named Recruiter based on the Standard User profile.

→ There are actually two ways of doing this—we can either click **New Profile**, select an existing profile to clone, name it, and click **Save**, or we can simply click **Clone** in the detail page of the profile that we want to copy, name it, and click **Save**.

- In the new Recruiter profile's detail page → click **Edit**.

→ The Recruiter edit page should look and function exactly like the Standard User profile edit page except with one important difference: you have the ability to modify any of the permission settings.

- In the Custom App Settings area, make the Recruiting app visible to users assigned to the Recruiter profile, as shown in the following screenshot.

Profile Custom App Settings Area

When an app is visible, a user can select it from the Force.com app menu at the top-right corner of the page. Be aware, however, that even if an app is visible, the app's tabs won't show up unless a profile has permissions to view the tabs and permission to view the associated object. (We'll set both of those permissions lower down in the Profile edit page.)

5. Select Default next to the Recruiting app.

Making this selection means that the Recruiting app will be displayed when a user logs in. You'll notice that when you select an app as the default, its Visible checkbox is automatically selected, because it doesn't make sense for an app to be the default if it's not visible to the user.

In the Object Settings area, select Default On for the Candidates, Employment Websites, Job Applications, and Positions tabs

Profile Tab Settings Area

Tab Settings
 Overwrite users' personal tab customizations

Standard Tab Settings

Campaigns	Default On
Leads	Default On
Accounts	Default On
Contacts	Default On
Opportunities	Default On
Contracts	Tab Hidden
Cases	Default On

Custom Tab Settings

Positions	Default On
Candidates	Default On

Object Settings

Solutions	Default On
Products	Default On
Reports	Default On
Documents	Default On
Dashboards	Default On
Portals	Tab Hidden
Console	Tab Hidden
Job Applications	Default On

Hiding a tab is not sufficient to prevent a user from accessing records for that tab.

Just below the Tab Settings area, the Administrative and General User Permissions areas of the profile allow you to grant special access to features and functionality that don't map directly to particular objects.

give the object-level permissions.

In the Custom Object Permissions area, specify the object-level permissions for our Recruiter profile according to the following table

Summary of Required Permissions: Recruiter

	Read	Create	Edit	Delete	View All	Modify All
Candidate	✓	✓	✓			
Employment	✓	✓	✓	✓	✓	✓
Website						
Job	✓	✓	✓			
Application						
Job Posting	✓	✓	✓	✓	✓	✓
Position	✓	✓	✓		✓	
Review	✓	✓	✓			

Tip: Depending on the apps that you made visible previously, you can also set additional object permissions on standard or other custom objects

6. Click **Save** to create your profile and return to the profile detail page.

Introducing Permission Sets

Like a profile, a permission set is a collection of settings and permissions that determine what a user can do. Permission sets include some of the same permissions and settings you'll find in profiles.

- Object permissions
- Field permissions (also known as “field-level security”)
- User permissions
- Tab settings
- App settings
- Apex class access
- Visualforce page access

Why profiles and permission sets?

→ The most significant difference between the two is that users can have only one profile, but they can have many permission sets. This means you can use profiles to grant the minimum permissions and settings that every type of user needs, then use permission sets to grant additional permissions, without changing anyone's profiles

→ There are a couple of ways to use permission sets to your advantage.

1. To grant access to custom objects or entire apps.
2. To grant permissions—temporarily or long term—to specific fields.

→ For example, let's say you have a user, Dana, who needs temporary edit access to a field while her co-worker is on vacation. You can create a permission set that grants access to the field and assign the permission set to Dana. When Dana's co-worker returns from vacation and Dana no longer needs access to the field, you just remove the permission set assignment from Dana's user record

→ We've talked about four types of users: recruiters, hiring managers, standard employees, and interviewers. Let's take a closer look.

→ Recruiters are pretty straightforward—they definitely represent a particular job function, and they need access to different types of data than other users. They need their own profile.

→ Standard employees are pretty generic, and they don't reflect a particular job function. Standard employees can start with a profile that gives access to a small set of data, and then depending on what their specialties are, we can create and assign permission sets to give them more access as needed.

→ Finally, let's look at interviewers. When you think about it, just about anyone in an organization might be called upon to perform an interview. Furthermore, a company may have a peak recruiting season, when many employees will be interviewers for a limited amount of time. Ideally, permissions for interviewers could be easily granted and revoked as needed. It's easy to define

permission sets based on a particular task—and even easier to assign and unassign them, so let's define a permission set for interviewers.

Create the Hiring Manager Permission Set

→ We've created two profiles for our easy-to-define job functions. Now we need to grant additional access for functions that may not be specific to any given job title.

1. From Setup, enter Permission Sets in the Quick Find box, then select **Permission Sets**.
2. On the Permission Sets page, click **New**.
3. In the Label field, enter Hiring Manager.
4. The API Name field is defaulted to Hiring_Manager. Let's leave it as is

→ When you assign permission sets to a user, you can only assign permission sets that have the same user license as the user or permission sets with no associated license. You can't change the license later, so it's important to choose the correct user license when you create a permission set.

5. In the User License field, select Salesforce → Click **Save**.

→ We've taken the initial step of creating a permission set. While you can clone permission sets, you can also create one completely from scratch, and that's what we did when we created this one.

→ At the moment, this permission set has no enabled settings or permissions—it's a blank slate. So let's enable some permissions and settings. Since this permission set is for hiring managers, we'll start by making the Recruiting app visible

1. Click **Assigned Apps**.
2. In the Assigned Apps page, click **Edit**.
3. Under Available Apps, select Recruiting and click **Add** to add it to the Enabled Apps list → Click Save.

Permission Set Overview Page

Permission Set Overview		Assigned Users	
Description	API Name	Namespace Prefix	Hiring_Manager
User License	Salesforce		
Created By	Jane Smith, 7/3/2012 5:12 PM	Last Modified By	Jane Smith, 7/5/2012 12:52 PM

Apps	
Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com Learn More	Assigned Apps Settings that specify which 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

System	
Settings that apply across all apps, such as record and user management Learn More	System Permissions Permissions to perform actions that apply across apps, such as "Modify All Data"

Assigning the Recruiting App in the Hiring Manager Permission Set

The screenshot shows the 'Assigned Apps' section of the 'Hiring Manager' permission set. At the top, there's a search bar labeled 'Find Settings...', buttons for 'Clone', 'Delete', and 'Edit Properties', and a 'Help for this Page' link. Below that, the breadcrumb navigation shows 'Permission Set Overview > Assigned Apps'. The main area is titled 'Assigned Apps' with 'Available Apps' and 'Enabled Apps' sections. The 'Enabled Apps' section contains a single item: 'Recruiting', which is highlighted with a blue background. On the left, the 'Available Apps' section lists several standard Salesforce apps: Call Center, Community, Marketing, Platform, Sales, Salesforce Chatter, Sample Console, and Site.com. Between the two sections are 'Add' and 'Remove' buttons.

→ Next we want to enable tab settings and permissions for our custom objects. Where are those enabled and how do we get there? In permission sets, you have a few easy ways to move from one page to another. Let's take a look

→ The Object Settings page shows an overview for all objects and tabs in your organization. It includes a summary of tab settings, object permissions, and field permissions for every object and tab. Let's drill down to the Positions object.

1. In the list of objects, click Positions
2. On the Positions page, click Edit.

→ You may notice that tab settings labels in permission sets are different from the labels in profiles. They are configured a bit differently, but you'll get the same results

Create Users:

→ To really put our Recruiting app through its paces, we'll first need to define the rest of our users and assign a couple of them to some of the recruiting records that we imported earlier.

Note: If you're implementing the Recruiting app in a Developer Edition organization, you'll have only a few additional users to play with besides the System Administrator user.

Summary of Required Permissions: Recruiter and Standard Employee Profiles

	Recruiter	Standard Employee
Position	Read Create Edit	Read (No min/max pay)
Candidate	Read Create Edit	
Job Application	Read Create Edit	
Review	Read Create Edit	
Job Posting	Read Create Edit Delete	
Employment Website	Read Create Edit Delete	

1. From Setup, enter Users in the Quick Find box, then select **Users**→Click **New User**.
2. Fill out the required fields in the User edit page→From the Profile drop-down list, select **Recruiter**→Click **Save**

→Give ownership of the DBA position and its associated job application and candidate records.

3. Click the Positions tab.
4. From the View drop-down list, select All and click **Go**.

Tip: If you want to see more than just the Position Title field in this view, click **Edit** next to the View drop-down list and add additional fields in the Select Fields to Display section.

5. Click **DBA**.
6. Next to the Owner field, click **Change**.
7. Click the lookup icon  and choose Mario Ruiz.
8. Click **Save**.

Security and sharing rules:

Introducing Organization-Wide Defaults:

→When dealing with record-level access settings, the first thing we need to do is to determine the organization-wide defaults (commonly called “org-wide defaults”) for each object in our Recruiting app. Also called a sharing model, org-wide defaults specify the baseline level of access that the most restricted user should have.

→We'll use org-wide defaults to lock down our data to this most restrictive level, and then we'll use our other record-level security and sharing tools (role hierarchies, sharing rules, and manual sharing) to open up the data to other users who need to access it.

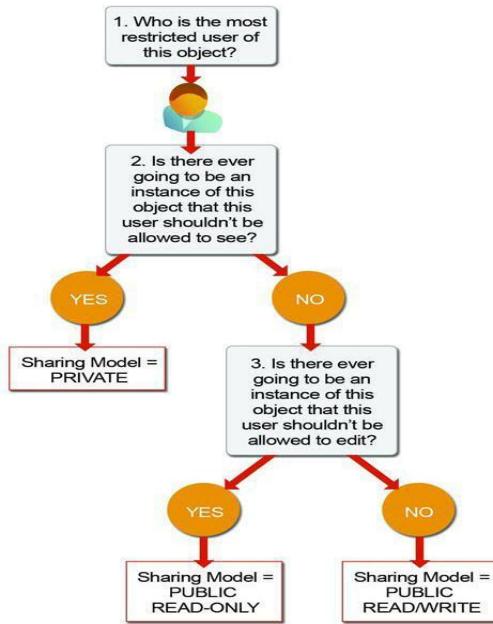
Org-Wide Defaults in Our Recruiting App:

→To determine the org-wide defaults that we'll need in our Recruiting app, we need to answer the following questions for each object

1. Who is the most restricted user of this object?
2. Is there ever going to be an instance of this object that this user shouldn't be allowed to see?
3. Is there ever going to be an instance of this object that this user shouldn't be allowed to edit?

→ Based on our answers to these questions, we can determine the sharing model that we need for that object as illustrated in the following diagram

Determining the Sharing Model for an Object



Set Org-Wide Defaults:

→ Now that we've figured out the org-wide defaults for each of our recruiting objects, let's go ahead and implement them in our Recruiting app.

→ From Setup, enter Sharing Settings in the Quick Find box, then select Sharing Settings. If you see an introductory splash page, click Set Up Sharing at the bottom of the page to skip to the actual tool.

→ The Sharing Settings page is where we control both org-wide defaults and sharing rules. We'll talk more about this page when we talk about sharing rules a little further down. For now, let's just edit our org-wide default settings.

→ In the Organization Wide Defaults area, click Edit

→ This page controls the org-wide defaults for every object in our organization. You'll notice that some standard objects (like leads and calendars) use a different set of org-wide default values than we have available for our custom recruiting objects.

Org-Wide Defaults Edit Page

Organization-Wide Sharing Defaults Edit [Help for this Page](#)

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time depending on the amount of data in your organization.

Object	Default Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	<input checked="" type="checkbox"/>
Account, Contract and Asset	Public Read/Write	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	<input checked="" type="checkbox"/>
Campaign	Public Full Access	<input checked="" type="checkbox"/>
Activity	Private	<input checked="" type="checkbox"/>
Calendar	Hide Details and Add Events	<input checked="" type="checkbox"/>
Price Book	Use	<input checked="" type="checkbox"/>
Candidate	Private	<input checked="" type="checkbox"/>
Employment Website	Public Read Only	<input checked="" type="checkbox"/>
Job Application	Private	<input checked="" type="checkbox"/>
Position	Public Read Only	<input checked="" type="checkbox"/>
	Public Read/Write	<input checked="" type="checkbox"/>
	Public Read Only	<input checked="" type="checkbox"/>

Some standard objects use different org-wide default options.

Custom object org-wide default options include Private, Public Read Only, or Public Read/Write.

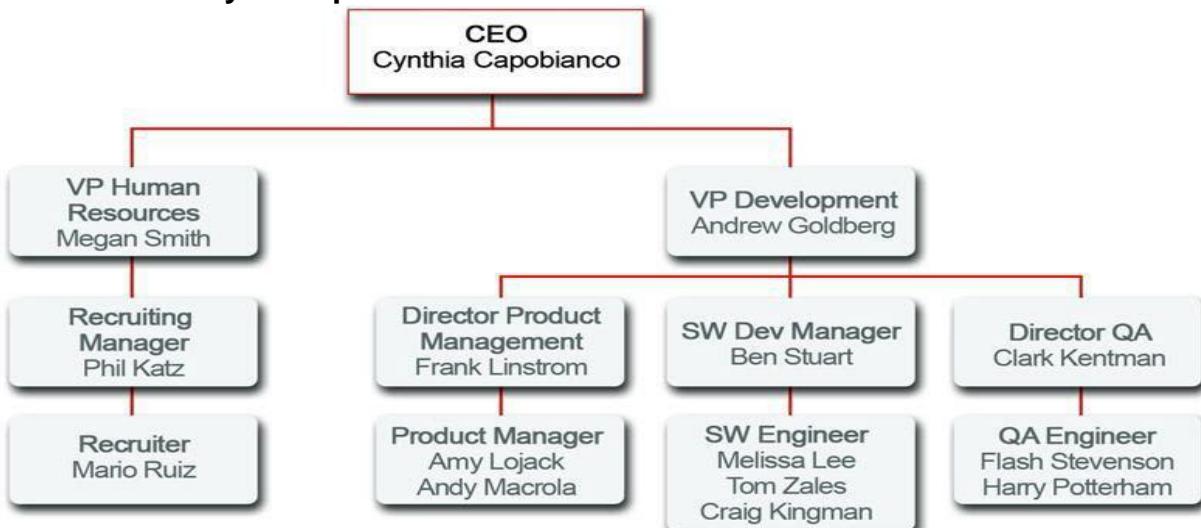
Save Cancel

- Next to Candidate and Job Application, select Private.
- Next to Employment Website and Position, select Public Read Only.
- Right about now, you're probably wondering why you can't set the org-wide defaults for the Review and Job Posting objects. The reason is that those objects are on the detail side of master-detail relationships, a detail record automatically inherits the sharing setting of its parent. So in our app, the Review object is automatically set to Private, and the Job Posting object is automatically set to Public Read Only → Click **Save**.

Introducing Role Hierarchies:

- The first way that we can share access to records is by defining a role hierarchy. Similar to an org chart, a role hierarchy represents a level of data access that a user or group of users needs. Users assigned to roles near the top of the hierarchy (normally the CEO, executives, and other management) get to access the data of all the users who fall directly below them in the hierarchy. The role hierarchy enables these behaviours
- A manager will always have access to the same data as his or her employees, regardless of the org-wide default settings. For custom objects, you can override this behaviour by deselecting the Grant Access Using Hierarchies checkbox. However, we want our role hierarchy to apply to all of our custom objects, so leave the checkboxes selected.
- Users who tend to need access to the same types of records can be grouped together—we'll use these groups later when we talk about sharing rules

Role Hierarchy example



→ Role hierarchies don't necessarily need to match your org chart exactly. Instead, each role in the hierarchy should just represent a level of data access that a user or group of users needs.

→ For example, suppose your organization employs a corporate lawyer who needs to access all of the records in the app. One easy way to accomplish this is by assigning the lawyer to the CEO role in your organization's role hierarchy. Since the CEO role is placed at the top of the hierarchy, anyone assigned to that role automatically gets full access to any record in the organization. It doesn't matter that technically the lawyer appears below the CEO in the regular org chart.

Comparing Roles, Profiles and Permission Sets:

→ Although it's easy to confuse profiles and permission sets with roles, they actually control two very different things.

→ As we learned earlier in this chapter, profiles and permission sets control a user's object- and field-level access permissions. Indeed, a user can't be defined without being assigned to a particular profile, since the profile specifies the most basic access for users.

→ Roles, on the other hand, primarily control a user's record-level access permissions through role hierarchy and sharing rules. Although a role assignment isn't exactly required when we define a user, it would be foolish of us not to assign a role since it makes it so much easier to define our record-level permissions.

→ Indeed, trying to define record-level permissions without assigning a role to a user would be a lot like trying to travel from New York to San Francisco by car when there's an airplane available—there's just a much more efficient way of doing it!

→ To help you remember which controls what, remember: Roles control Records

Define a Role Hierarchy:

→ Implementing a role hierarchy in the platform is easy once you have an idea of what the hierarchy should look like. It's best to start with your company's org chart and then consolidate different job titles into single roles wherever possible. For example, if Ben Stuart's software development group has a staff software engineer and a junior software engineer, these positions can be consolidated into a single Software Engineer role in the hierarchy.

→ Once that's squared away, we can get started defining the role hierarchy itself. For our exercise, we'll use the role hierarchy we talked about previously.

→ From Setup, enter Roles in the Quick Find box, then select Roles. If you see an introductory splash page called Understanding Roles, click Set Up Roles at the bottom of the page to skip to the actual tool.

Empty Role Hierarchy Page in Tree View Mode

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All Expand All

- Universal Containers
 - Add Role

Use this drop-down list to change your role hierarchy display mode.

Show in tree view
Show in list view
Show in sorted list view
Show in tree view

→ The default view for this page is the tree view, as indicated in the drop-down list on the far right side of the Role Hierarchy title bar.

→ When creating a role hierarchy, it's probably easiest to stick with this or the list view, because they both make it easy to see how the roles all fit together in the hierarchy.

→ The sorted list view is best if you know the name of a role that you want to find but aren't sure where it fits in the hierarchy, or if you don't want to click open all the tree nodes. For our purposes, we'll stick with the tree view.

→ When you first start defining a role hierarchy, the tree view displays a single placeholder node with the name of your organization. From this point, we need to add the name of the role that is highest up in the hierarchy—in our case, the CEO.

Note: If you're building your Recruiting app with a free Developer Edition organization, you may have a role hierarchy predefined as a sample. That's alright. You can still follow along and create some more roles.

→ Just under the name of your organization → click Add Role.

Note: If the CEO role already exists, click Edit.

→ In the Label text box, enter CEO. The Role Name text box autopopulates with CEO.

In the This role reports to text box, click the lookup icon and click Select next to the name of your organization

→ By choosing the name of the organization in the This role reports to text box, we're indicating that the CEO role is a top-level position in our role hierarchy and doesn't report to anyone.

→ In the Role Name as displayed on reports text box, enter CEO. This text is used in reports to indicate the name of a role. Since you may not want a long role name, like Vice President of

Product Development, taking up too much space in your report columns, it's advisable to use a shortened, yet easily identifiable, abbreviation

→ Leave any other options, such as Opportunity Access, set to their defaults. These access options don't have anything to do with our Recruiting app, and only appear if you have the org-wide defaults for a standard object set to a level more restrictive than Public Read/Write.

→ Click Save.

CEO Role Detail Page

Role
CEO

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Universal Containers » CEO
Siblings:

[Users in CEO Role \[0\]](#) | [Category Group Visibility Settings \[0\]](#)

Role Detail		Edit	Delete
Role Name	CEO	Role Name as displayed on reports	CEO
This role reports to	None	Sharing Groups	Role, Role and Subordinates
Modified By	Jane Smith, 8/16/2010 1:58 PM		
Customer Portal Role	[]	Every role can have one or more assigned users.	

Users in CEO Role [Assign Users to Role](#) [New User](#) [Users in CEO Role Help](#) [?](#)

No records to display

→ Now that we've created our first role, we can assign the appropriate user to it.

Click CEO to open the CEO role detail page → In the CEO role detail page, click Assign Users to Role → In the Available Users drop-down list, select All Unassigned.

→ Choose a user from the list (in our case, Cynthia Capobianco), and click Add to move her to the → Selected Users for CEO list → Click Save.

→ If we return to the main Roles page from Setup by entering Roles in the Quick Find box, then selecting Roles, we can now see our new CEO role in the hierarchy

Note: If you see the Sample Role Hierarchy image, click Set Up Roles.

→ Define the rest of the roles according to the Role Hierarchy diagram.



Tip: To speed up the process of adding a new role, click Add Role directly under the name of the role to which the new role should report. When you do this, the This role reports to text box is automatically filled in with the name of the appropriate role.

Field-Level Security:

- In the platform, we control access to individual fields with field-level security. Field-level security controls whether a user can see, edit, and delete the value for a particular field on an object.
- Unlike page layouts, which only control the visibility of fields on detail and edit pages, field-level security controls the visibility of fields in any part of the app, including related lists, list views, reports, and search results.

Field-Level Security in Our Recruiting App:

- Just to refresh our memories about what field-level security settings we need for our Recruiting app, let's take another look at our required permissions in the following table.
- We'll keep them organized by recruiter, hiring manager, and standard employee, because it turns out that field-level security settings are closely related to profiles and permission sets

Revised Summary of Required Permissions

	Recruiter	Hiring Manager	Standard Employee
Position	Read Create Edit	Read Create Edit*	Read (No min/max pay)
Candidate	Read Create Edit	Read* (No SSN)	Read* (No SSN)
Job Application	Read Create Edit	Read Edit (No lookup fields)	Read*
Review	Read Create Edit	Read Create Edit	Read** Create Edit**
Job Posting	Read Create Edit Delete	Read*Create*Edit*	
Employment Website	Read Create Edit Delete	Read	

- Only for those records that are associated with a position to which the hiring manager/interviewer has been assigned
- Only for those records that the interviewer owns
- For field-level security settings, we'll first zero in on those rules that include field restrictions in parentheses, specifically:
- On the Position object, hide minimum and maximum pay from standard employees and interviewers

- On the Candidate object, hide social security numbers from hiring managers and interviewers
- On the Job Application object, make the Position and Candidate lookup fields read-only for hiring managers
- Limit Access to Fields in the Standard Employee Profile

1. From Setup, enter Profiles in the Quick Find box, then select Profiles, and select the Standard Employee profile

Standard Employee Profile Detail Page

Profile [Help for this Page](#)

Standard Employee

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.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#)

Profile Detail		Edit	Clone	Delete	View Users
Name	Standard Employee				
User License	Salesforce			Custom Profile	<input checked="" type="checkbox"/>
Description					
Created By	Jane Smith, 7/30/2010 10:49 AM			Modified By	Jane Smith, 7/30/2010 11:03 AM

Console Settings

Console Layout [\[Edit\]](#)

Page Layouts

Standard Object Layouts

Home Page Layout	Event
DE Default [View Assignment]	Event Layout [View Assignment]

2. In the Field-Level Security area, click View next to the Position object → Click Edit.

Field-Level Security Edit Page

Position Field-Level Security for profile Standard Employee			
Field Name	Field Type	Visible	Read-Only
Apex	Checkbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>
C#	Checkbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Close Date		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Days Open	Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Educational Requirements	Long Text Area	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Functional Area		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hire By		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hiring Manager	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Java	Checkbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>
JavaScript	Checkbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Job Description	Long Text Area	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Job Level	Picklist	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Location		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Max Pay		<input type="checkbox"/>	<input type="checkbox"/>
Min Pay		<input type="checkbox"/>	<input type="checkbox"/>
Open Date	Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>

If both boxes are selected, the field is Read-Only.

If only the Visible box is selected, the field is editable.

If neither box is selected, the field is hidden from the user.

- After doing this exercise, it's easy to see that most fields are editable, because their Visible checkbox is the only one selected.
- To restrict a field from ever being viewed by a user, all we have to do is deselect both checkboxes
- Next to the Max Pay field, deselect Visible.
- Next to the Min Pay field, deselect Visible.
- Click Save.
- Now let's take care of the remaining field-level security rules. Again, since we know that our interviewers and hiring managers will be assigned the Standard Employee profile, we'll ensure that its field permissions are set correctly
- Click Back to Profile.
- In the Field-Level Security area, click View next to the Candidate object.
- Click Edit.
- Next to the SSN field, deselect Visible.
- Click Save.
- Click Back to Profile.
- In the Field-Level Security area, click View next to the Job Application object.
- Click Edit.

- Next to the Candidate and Position fields, select Read Only.
- Click Save.
- We're done setting field-level security for the Standard Employee profile. We didn't have to change anything in the Recruiter profile because, as we already determined in the planning stage, recruiters can access all the fields we created in our objects.

Steps to add custom logo to the application:

- 1) Click the '+' button in the tabpanel → select documents
- 2) Click new button → provide valid document name and choose the logo → click save button.
- 3) Open app menu → click edit button on required application → click insert an image button → choose the document(must be less than 20kb) → click save button.

Add columns for selecting record:[when tab is selected]

Step1: Go to quick access menu and click edit colums then in the available fields choose the required columns and add to selected fields.

NOTE: we can add maximum 10 columns

Step2: In the selected fields columns can be adjusted by moving up or down for our convenience.

Step3: click save and then we can see the columns on the home page.

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