

JOB APPLICATION TRACKING SYSTEM

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Job Application Tracking System

Project Description

Create a CRM Application which helps the applicant to track the No. of jobs he applied and helps him to find the job posted by the various recruiters, find the best attributes to be involved to run the process in a smooth way and easily to track.

Create a Data Model for the App

To make the existing app more efficient for the Job application we create custom objects and relationships to store and access the data more efficiently.

Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

Milestone 1- Salesforce:

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

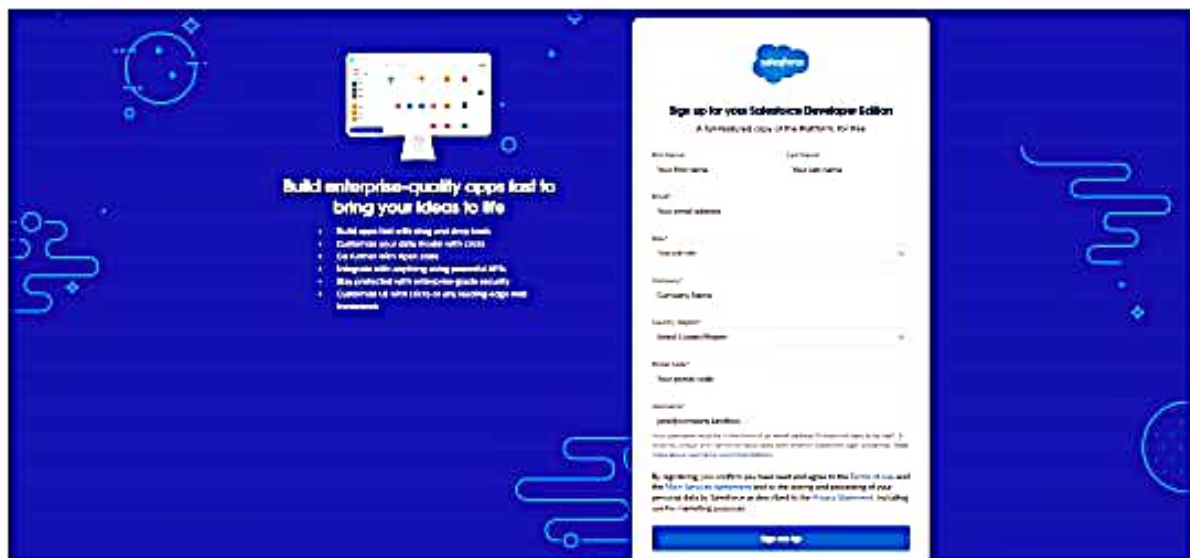
<https://youtu.be/r9EX3IGde5k>

Activity1:

Creating a Salesforce Developer Org:

A Developer org has all the features and licenses you need to get started with Salesforce.

1. Search [Developer.salesforce.com](https://developer.salesforce.com)



The screenshot shows the Salesforce Developer Edition sign-up page. On the left, there is a blue background with white text and icons. The text reads: "Build enterprise-quality apps fast to bring your ideas to life". Below this, there is a list of features: "Build apps fast with drag-and-drop tools", "Customize your data model with clicks", "Go to market with AppExchange", "Integrate with existing legacy systems", "Risk reduction with enterprise-grade security", and "Customer self-service to any device, any time". On the right, there is a white form with the Salesforce logo at the top. The form title is "Sign up for your Salesforce Developer Edition". Below the title, there is a subtitle: "A full-featured copy of the Platform, for free". The form fields include: "First Name", "Last Name", "Email", "Role", "Company", "Country/Region", "Postal Code", and "Username". At the bottom of the form, there is a "Sign me up" button.

2. Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.

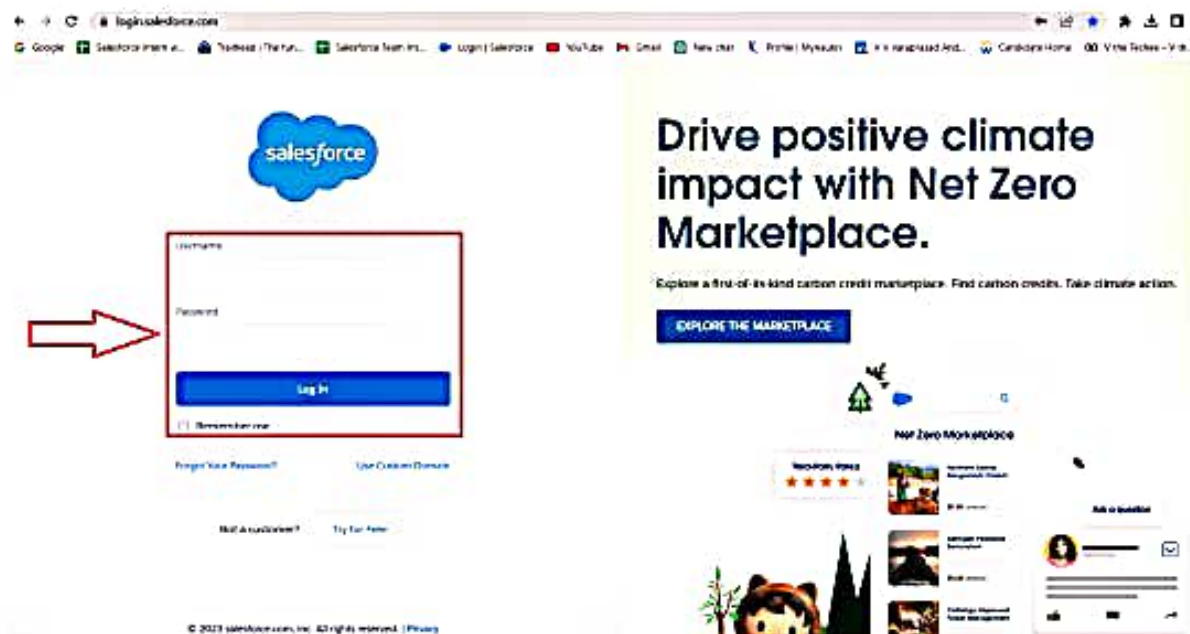
3. Click sign me up, after a few min you will receive a mail salesforce org and by using the verify account link you can create your new password.



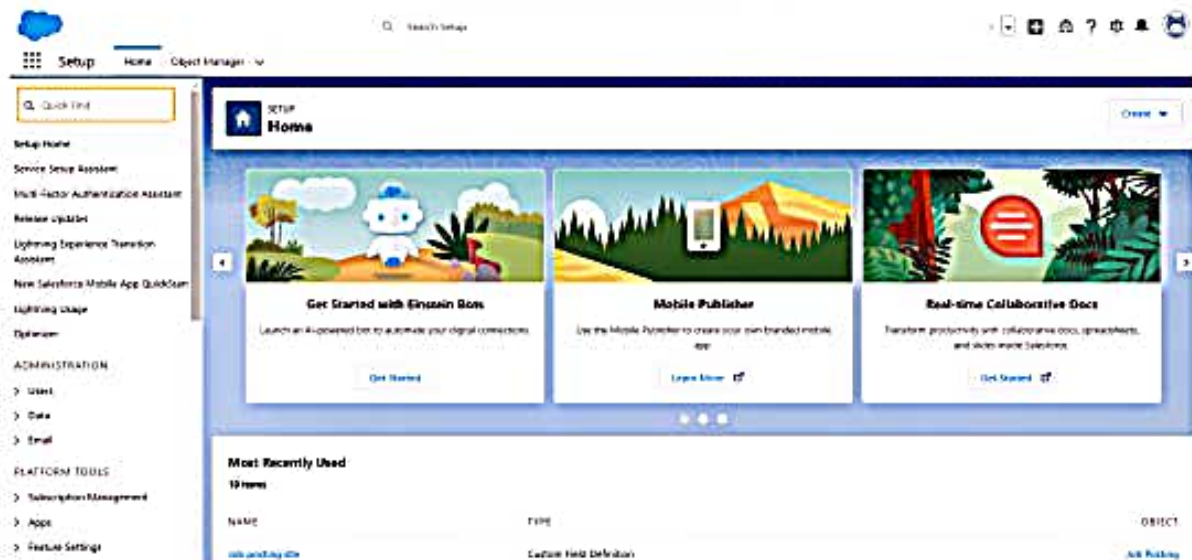
4. Click save.

5. Search login.salesforce.com

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



The setup page will appear as below.



Milestone 2-Object:

What is an object?

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

Salesforce objects are of two types:

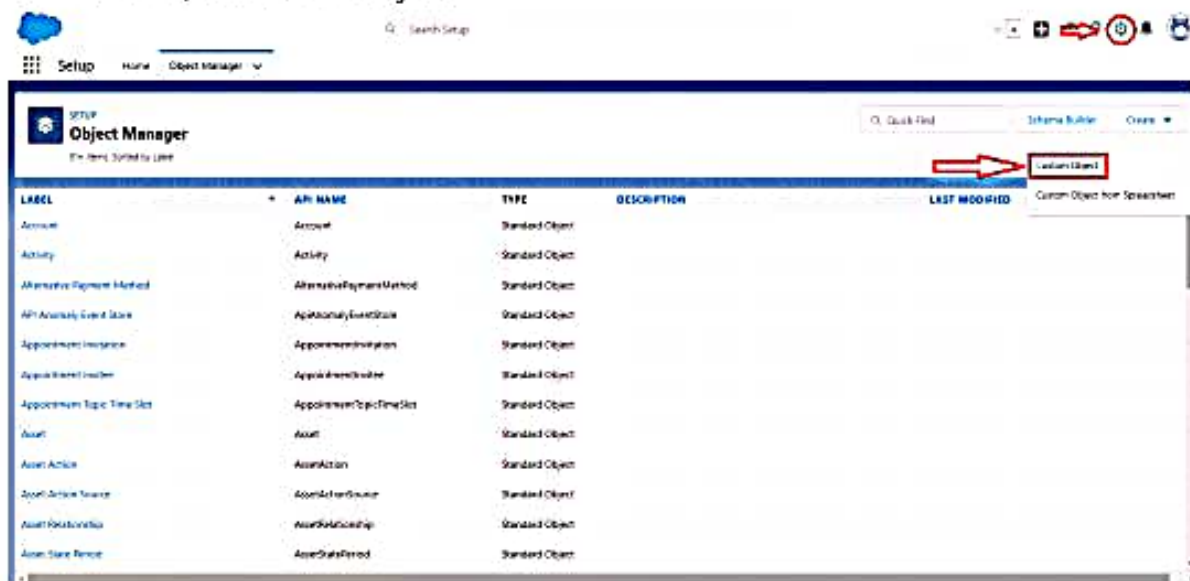
- **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Activity 1:

Create a custom object for Recruiter:

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.



3. Fill in the label as " Recruiter ".
4. Fill in the plural label as " Recruiters".
5. Record name: " Recruiter Number"
6. Select the data type as "Auto Number".
7. Under display format enter "REC-{0000} ".
8. Enter starting number as 1.
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

SETUP **New Custom Object**

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used to label page layouts and reports.

Label Example: Accounts
 Plural Label Example: Accounts
☐ Starts with lower case

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

Object Name Example: Accounts
 Description

Control: Retrieve Info Setting ☒ Open the standard Salesforce user Help & Training window
☐ Open a window using a Salesforce page

Control Name

Enter Record Name Label and Format

The Record Name appears in page layouts, two tabs related lists, layouts, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name
 Date Time Example: A (0000) 0000.0000
 Number Format
 Naming Number

SETUP **New Custom Object**

Default Product

☒ Allow Reports
☐ Allow Activities
☒ Task Feed History
☐ Allow in Chatter Groups
☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

☒ Allow Streaming
☒ Allow Bulk API Access
☒ Allow Streaming API Access

Deployment Status

☐ In Development
☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

☒ Allow Search

Object Creation Options (available only when custom object is first created)

☒ Add Roles and Relationships related to default page layout
☐ Launch New Custom Tab Wizard after saving the custom object

Save Save & New Cancel

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

Activity 2:

1. Create a Jobs, Candidate, Job Application Object and Tab.
 Note :- Follow the steps from the above activity

Milestone 3- Fields:

What are fields?

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


There are 2 types of fields in salesforce:

- **Standard fields:** There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.
- **Custom fields:** The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.


Activity 1:

Create the custom fields:

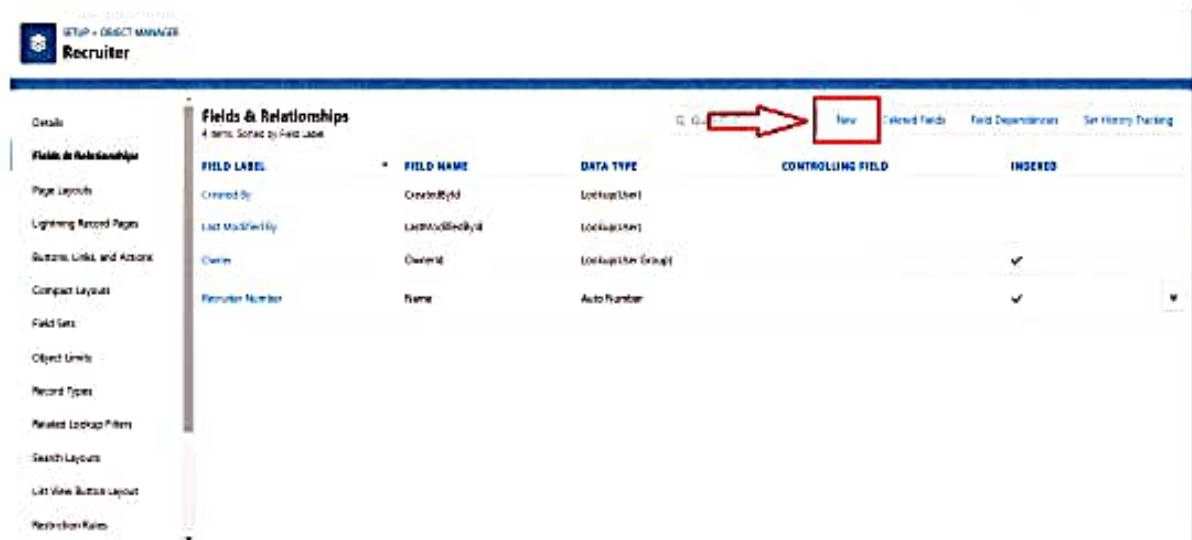
1. Click the object manager tab, Select the object for which you have to create the fields and relationships.

<div>  Object Manager </div> <div> <div>Quick Find</div> <div>Schema Builder</div> <div>Online</div> </div>					
153 Items, Sorted by Label					
LABEL	* API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Activity Event Source	APIActivityEventSource	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			

2. From the sidebar, click **Fields & Relationships**. Notice that there are already some fields there. Those are the standard fields.

<div>  Recruiter </div> <div> <div>Quick Find</div> <div>Fields</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Get History Tracking</div> </div>					
Fields & Relationships					
4 Items, Sorted by Field Label					
FIELD LABEL	* FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedBy	Lookup User			
Last Modified By	LastModifiedBy	Lookup User			
Owner	OwnerId	Lookup User (Required)		✓	
Recruiter Number	Number	Auto Number		✓	

3. Click New to create a custom field. Tip: Before creating a new field, do a quick search to make sure a similar one doesn't already exist.



4. Click on the new to create a field.

5. Choose the data type as a Text, click next



6. Enter field label, length and Name and click next

SETUP - OBJECT MANAGER
Recruiter

Details

Fields & Relationships

Page Layouts

Lightning Record Page

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Field Label:

Please enter the maximum length for a text field below

Length:

Field Name:

Description:

Help Text:

Required: ☒ Always requires a value in the field in order to save a record

Unique: ☐ Do not allow duplicate values

☐ Treat "ABC" and "abc" as duplicate values (case insensitive)

☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID: ☐ Set this field as the unique record identifier from an external system

Also add to custom report type: ☒ Add this field to existing custom report types that contain this entry

Default Value:

Use RETURN key, Enter key or mouse click off screen to save values. "Go Back" button returns values saved.

21. When you click on a record, it will add related data information to the bottom screen. Click "Go Back" to return to the previous screen.

Go Back

Next

Cancel

7. Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security. Click next
8. Select the page layouts that should include this field.
9. Click save.

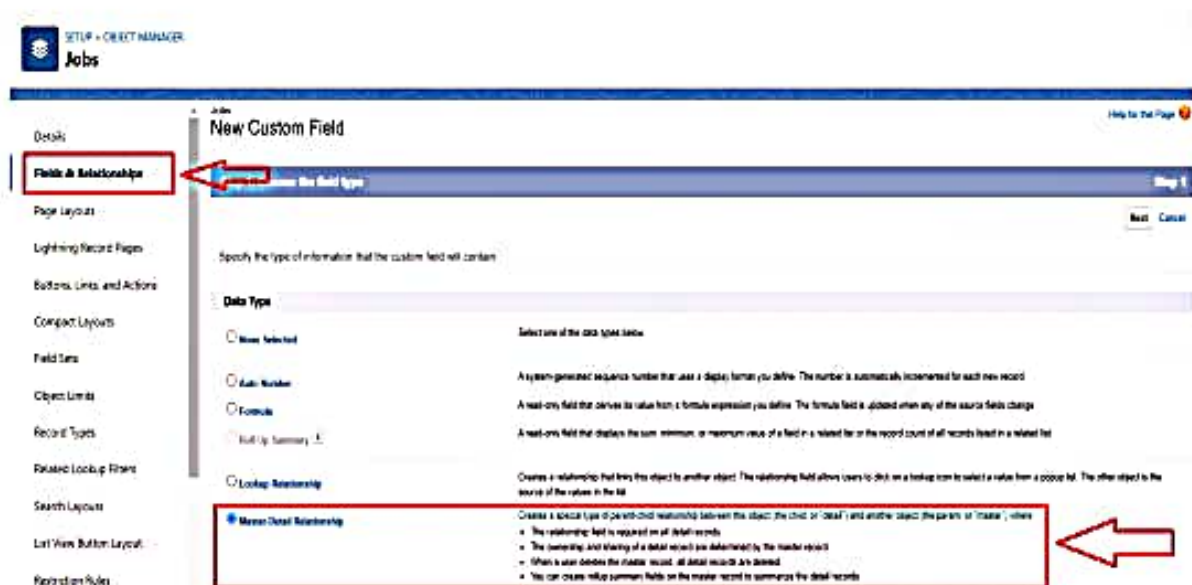
Activity 2:

Creation of Master-detail relationship:

1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.



4. Choose Master-detail Relationship and click Next



5. Choose the related object and select that object.

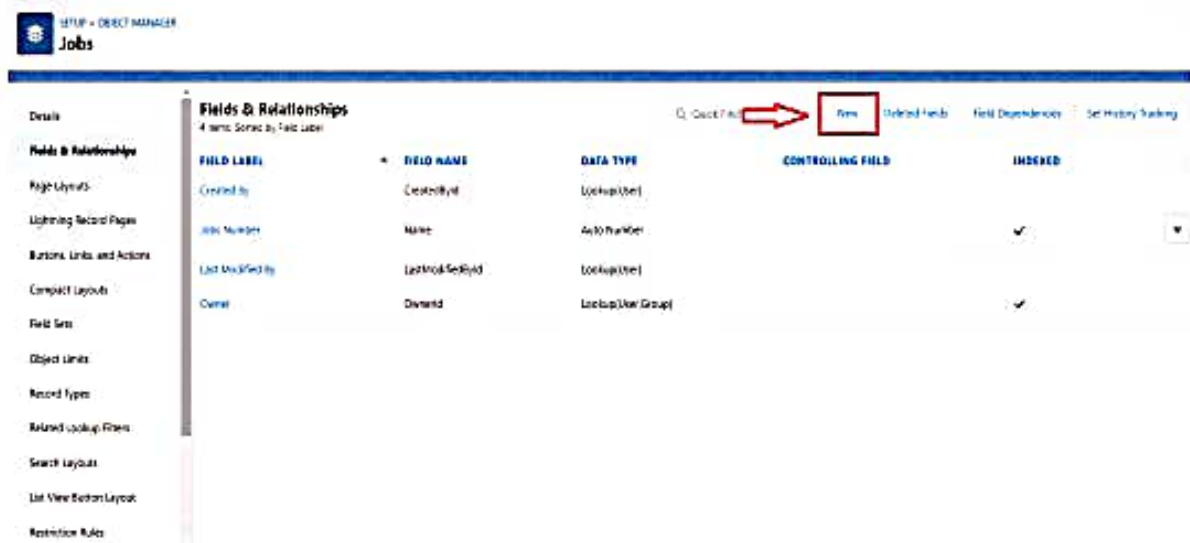
6. Enter the label and name for the lookup field

7. Click Next, Next, and Save

Activity 3:

Create a new custom field:

1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.



Setup - OBJECT MANAGER
Jobs

Details

Fields & Relationships
4 items. Sorted by Field Label

Q. Quick Find **New** Related Fields Field Dependency Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Job Number	Name	AutoNumber		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Fields
Search Layouts
List View Buttons Layout
Restriction Rules

4. Choose the data type Text Area click next

Activity 4:

Create a new custom field:

1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.

The screenshot shows the Salesforce Object Manager interface for the 'Jobs' object. The left sidebar contains a list of options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Fields & Relationships' and shows a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are 'Created By', 'Name', 'Last Modified By', and 'Owner'. The 'Name' field is highlighted with a red box and an arrow pointing to it. The 'New' button is also highlighted with a red box and an arrow pointing to it.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Name	Name	Auto Number		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓

4. Choose the data type Text click next



5. Enter the Field Label and field name click next



6. Click next and save.

Milestone 4-Tab:

What is Tab?

In Salesforce, a tab is a user interface element that allows users to navigate to different sections of the platform, such as Accounts, Contacts, Leads, and Opportunities. Tabs can also be used to access custom objects and custom pages. They are typically located at the top of the screen and can be customized to fit the needs of the organization.

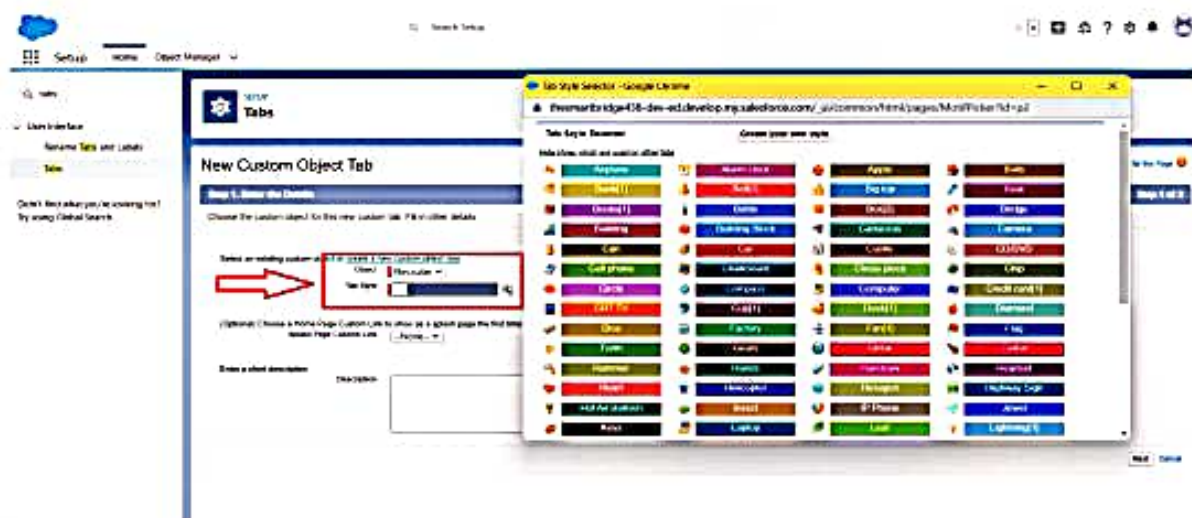
Activity 1 :

Create a tab :

1. Click setup
2. Search tab in Quick box then, select tab
3. Click New custom object tab section



4. Select the created object Recruiter and tab style for the new custom tab.



5. Select the profiles that visible in the tab
6. Click on custom apps to make visible.
7. Click save.

Milestone 5- Profile:

What is a profile?

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

A profile can be assigned to many users, but user can be assigned single profile at a time.

Activity 1:

Create a custom profile :

1. From setup, enter profiles in Quick Find box
2. Select profiles.
3. Click clone.

5. Then create a new role Hr Manager.
6. Select user License as Standard Platform User.
7. Select profile.

The screenshot shows the 'New User' setup page in Salesforce. The page is divided into two main sections: 'General Information' and 'Permissions'. The 'General Information' section contains fields for First Name, Last Name, Email, Username, Password, and Role. The 'Permissions' section contains checkboxes for various permissions like Marketing, Office, Knowledge, and File. The Role is set to 'Standard Platform User'.

8. Click save

Activity 2:

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

Milestone 7-Sharing Rules

What are Sharing Rules?

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

Types of sharing rules,

- Owner-based Sharing Rules
- Criteria-based Sharing Rules

Activity 2:

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

Follow the steps from above Activity

Milestone 6-User

What is a user?

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

Activity 1:

To Create a user:

1. From Setup, enter Users in the Quick Find box, then select Users.
2. Click New User.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is visible, with 'Users' highlighted under 'User Management Settings'. The main content area is titled 'All Users' and includes a table of existing users. A red box highlights the 'New User' button, with an arrow pointing to it from the left. The table lists users with columns for checkboxes, first name, last name, email, username, role, and active status.

	First Name	Last Name	Email	Username	Role	Active	Profile
<input type="checkbox"/>	Archie	Full Name 1					
<input type="checkbox"/>	Archie	Archie	Archie.Archie@salesforce.com	Archie	Customer Success - International	✓	Archie - Administrator
<input type="checkbox"/>	Chloe	Chloe	Chloe.Chloe@salesforce.com	Chloe	Customer Success - International	✓	Chloe - User
<input type="checkbox"/>	Bob	Bob	Bob.Bob@salesforce.com	Bob	Customer Success - International	✓	Bob - User
<input type="checkbox"/>	John	John	John.John@salesforce.com	John	Customer Success - International	✓	John - User
<input type="checkbox"/>	John	John	John.John@salesforce.com	John	Customer Success - International	✓	John - User

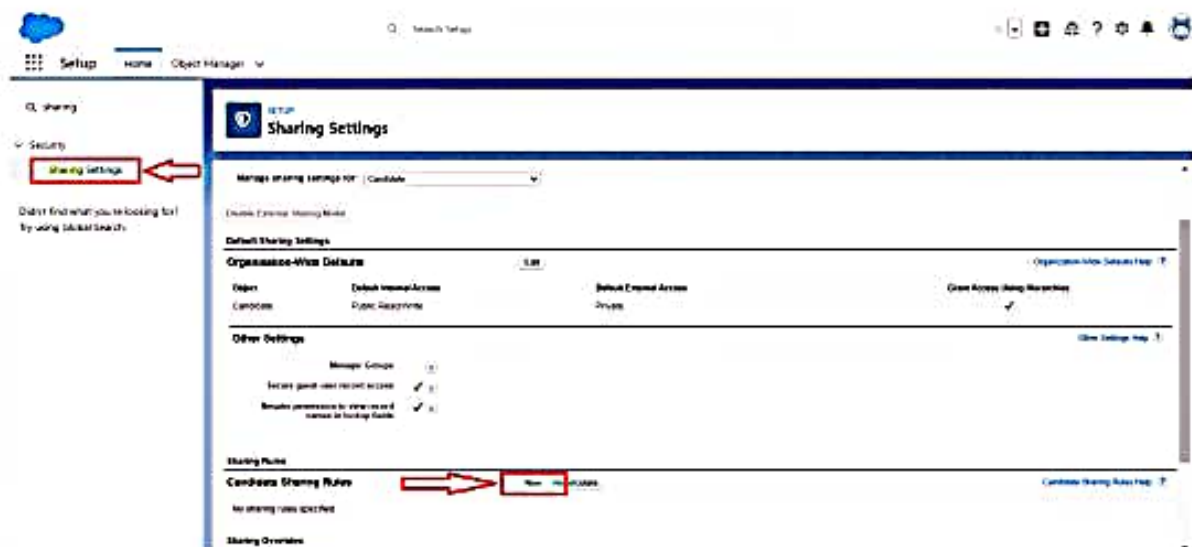
3. Enter First name as Hr and last name as Manager.

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

Activity 1:

Create a sharing rule

- 1) Go to Sharing Settings, which can be found under the Quick Find section.
- 2) Scroll down and find the candidate object where a sharing rule needs to be added, and then click on New to create a new sharing rule.



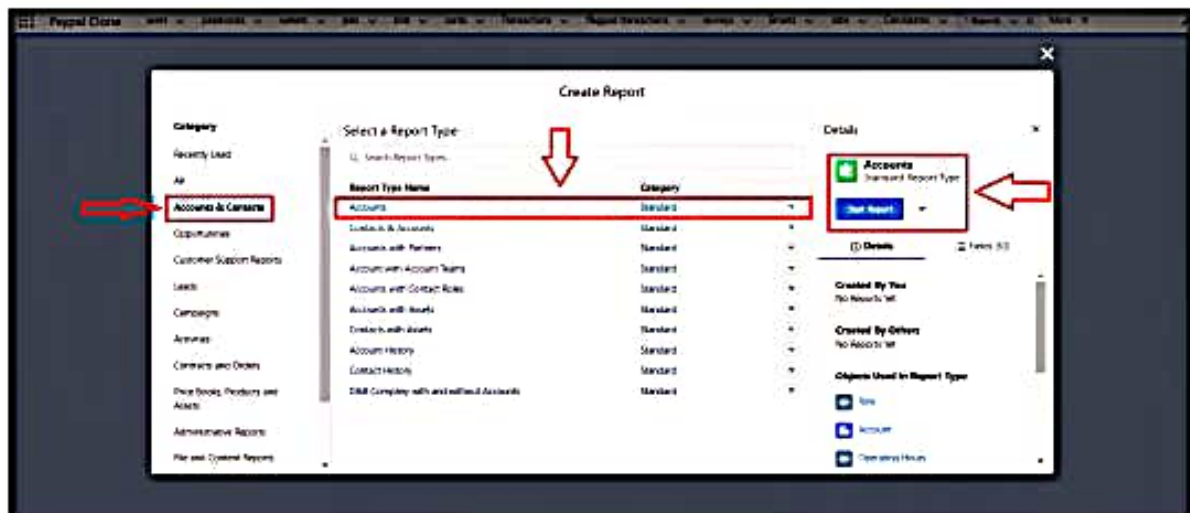
- 3) Add the label of the sharing rule you want to make.
- 4) Select your rule type based on the criteria.
- 5) Select the field can join immediately check field from the candidate object.
- 6) Select the operator as equal and value is true.
- 7) And in selecting the users to share with the section select roles and in that select Hr Manager.
- 8) And in the section of select the level of access for the users give the access Read/Write.

Activity 1:

Create a report:

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

- 1) Click on app launcher search for reports.
- 2) Click on the new report and select the category has accounts and contacts.



- 3) And the report type has accounts.
- 4) In the details section select the option start report.
- 5) In the filter pane select All accounts to show me.
- 6) And All time is created.
- 7) In the outline pane, group rows select Rating and in group columns select Account Name.
- 8) In the columns section add Type and Billing city.

Sharing Settings

Step 1: Rule Name

Label:

Rule Name:

Description:

Step 2: Select your rule type

Rule Type: ☐ Based on record owner ☒ Based on criteria

Step 3: Select which records to be shared

Field	Operator	Value	
Employee Number	is equal to	12345	AND
Phone	is	1234567890	AND
Phone	is	1234567890	AND
Phone	is	1234567890	AND
Phone	is	1234567890	AND

Additional Criteria: ☒ include records owned by users who last have an assigned role

Step 4: Select the users to share with

Share with:

Step 5: Select the level of access for the users

Access Level:

9) And save the rule.

Activity 2:

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

Follow the steps from above Activity.

Milestone 8-Reports:

What are Reports?

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

