

Phase 8 — Data Management & Deployment

1. Data Import Wizard

- **Use case in your project:** Import sample Candidates, Jobs, Applications, Interviews (CSV).
- **Steps:**
 1. Go to Setup → Data Import Wizard.
 2. Select Object (e.g., Candidate).
 3. Upload CSV (your test dataset).
 4. Map fields (e.g., CSV Email → Salesforce Email__c).
 5. Run Import → Check records in Salesforce.

The screenshot shows the 'Edit Field Mapping: Candidates' page. At the top, there's a progress bar with 'Almost done' at the end. Below it, there are buttons for 'Choose data', 'Edit mapping', and 'Start import'. A 'Help for this page' link is also present. The main area displays a table of field mappings:

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Candidate Name	Candidate Name	Alice Johnson	Bob Smith	Charlie Brown
Change	Email	Email	alice.johnson@e	bob.smith@exan	charlie.brown@example.com
Change	Phone	Phone	9876543210	9876543211	9876543212
Change	Skills	Skills	Java, Salesforce	Python, React, N	Apex, LWC, JavaScript
Change	Source	Source	LinkedIn	Campus	Referral

Duplicate Rules

- **Use case:** Prevent duplicate Candidate emails or duplicate Job IDs.
- **Steps:**
 1. Setup → Duplicate Rules → New Rule.
 2. Object = Candidate.
 3. Matching Rule = Email must be unique.
 4. Action = Block or Allow with Alert.

The screenshot shows the 'Matching Rule Detail' page for 'Unique Candidate Email'. It includes fields for Object (Candidate), Rule Name (Unique Candidate Email), Unique Name (Unique_Candidate_Email), Matching Criteria (Candidate: Email EXACT MatchBlank = FALSE), Status (Active), and Created By (Santhosh Pathulothu, 9/26/2025, 10:56 PM). There are also 'Delete', 'Clone', and 'Deactivate' buttons.

The screenshot shows the 'Duplicate Rule Detail' page for 'Candidate Email'. It includes fields for Rule Name (Candidate Email), Description, Object (Candidate), Record-Level Security (Enforce sharing rules), Action On Create (Allow), Action On Edit (Allow), Alert Text (Use one of these records?), Active (checked), Matching Rule (Unique Candidate Email, Mapped), Conditions, Created By (Santhosh Pathulothu, 9/26/2025, 10:58 PM), Operations On Create (Alert checked, Report checked), Operations On Edit (Alert unchecked, Report unchecked), Matching Criteria (Candidate: Email EXACT MatchBlank = FALSE), and Modified By (Santhosh Pathulothu, 9/26/2025, 10:58 PM). There are also 'Edit', 'Delete', 'Clone', and 'Deactivate' buttons.

Phase 9 — Reporting, Dashboards

Step 1: Create a Report (Applications Pipeline)

1. In Salesforce, go to the App Launcher (grid icon) → search Reports → click Reports.
2. Click New Report (top right).
3. In the report type search bar, type Applications → select Applications → click Continue.
4. By default, a table with some fields will appear.
5. Choose the format:
 - Tabular: Leave as default (just rows).
 - Summary: Drag Status into the "Group Rows" section → now Applications are grouped by Status.
 - Matrix: Drag Status to "Group Rows" and Job Title to "Group Columns".
6. Click Save & Run.
 - Name = “Applications by Status”.
 - Folder = Public Reports (so others can see).

The screenshot shows a Salesforce Lightning Report titled "Report: Candidates with Applications with Interviews" and "Applications by Status".

Summary Table:

Status	Job: Job Title	HR Manager	Salesforce Developer Intern	Total
Submitted	Record Count	1	1	2
Total	Record Count	1	1	2

Details Table:

	Candidate Name	Application Number	Interview Name
1	Priya Sharma	APP-0003	HR Interview
2	Arjun Reddy	APP-0002	Technical Interview
3			

Step 2: Create a Custom Report Type (Candidate + Applications)

1. Setup → Quick Find → Report Types → New Custom Report Type.
2. Primary Object = Candidate.
3. Related Object = Applications (Each candidate may or may not have applications).
4. Save.
5. Now go back to Reports → New Report → Choose Custom Report Type → Candidate with Applications.
6. Add fields: Candidate Name, Email, Job Title, Application Status.

- Save as “Candidates with Applications”.

The screenshot shows the Salesforce Report Builder interface. At the top, it says "REPORT" and "New Candidates with Applications Report". Below that is a preview area with two rows of data:

	Candidate Name	Application Number	Email	Job: Job Title	Status
1	Arjun Reddy	APP-0002	arjun.reddy@example.com	Salesforce Developer Intern	Submitted
2	Priya Sharma	APP-0003	priya.sharma@example.com	HR Manager	Submitted

On the left side, there are sections for "Outline", "Filters", "Groups", and "Columns". Under "Groups", there is a "GROUP ROWS" button and an "Add group..." input field. Under "Columns", there is a "Add column..." input field and a list of columns: Candidate Name, Application Number, Email, Job: Job Title, and Status. Each column has a delete icon next to it.

Step 3: Create a Dashboard

- Go to App Launcher → search Dashboards → click Dashboards.
- Click New Dashboard.
 - Name = “Recruitment Dashboard”.
 - Folder = Public Dashboards.
- Click + Component.
 - Choose the Applications by Status report.
 - Display as Pie Chart → Show percentage of Submitted/Shortlisted/Hired/Rejected.
- Click + Component again.
 - Choose Applications by Job report.
 - Display as Bar Chart → Applications count per Job.

Save → Done.

The screenshot shows the "Recruitment Dashboard". It contains two components:

- Applications by Status:** A donut chart titled "Record Count" with the number "2" in the center. Below it is a link "View Report (Applications by Status)".
- New Candidates with Applications Report:** A table with the same data as the report in Step 2, showing two candidates: Arjun Reddy and Priya Sharma.

 The dashboard has a header with tabs: "Jobs", "Applications", "Candidates", "Interviews", and "Dashboards". There are also buttons for "+ Widget", "+ Filter", and a refresh icon.

Step 4: Make it Dynamic

- Open the Dashboard you created → click Edit.
- In Dashboard Settings (top right), set:
 - View Dashboard As → Logged-in User (instead of a fixed user).
- Save.

Properties

* Name
Recruitment Dashboard|

Description

Folder
Private Dashboards [Select Folder](#)

This dashboard is owned by Santhosh Pathulothu

View Dashboard As
 Me
 Another person
 The dashboard viewer

📌 What this does:

- A Recruiter sees only their candidates.
- An HR Manager sees all applications.