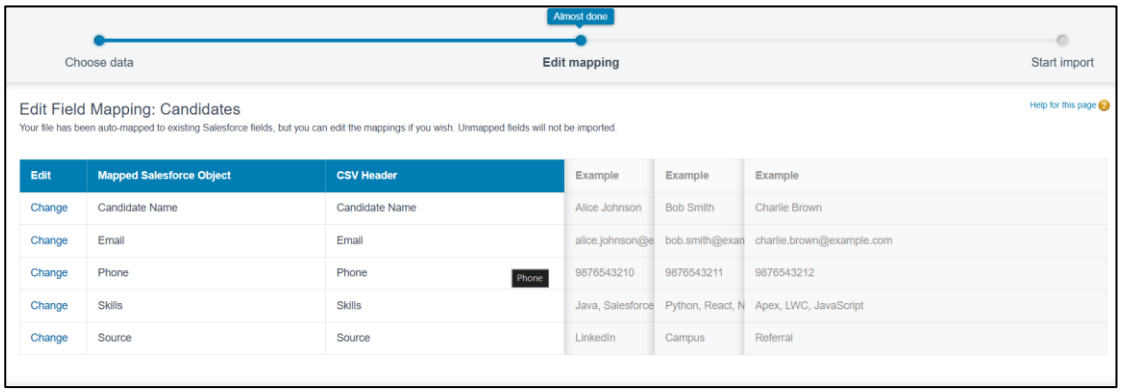
Phase 8 — Data Management & Deployment

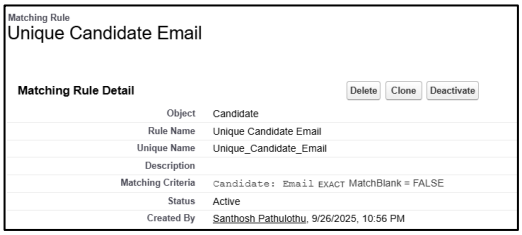
1. Data Import Wizard

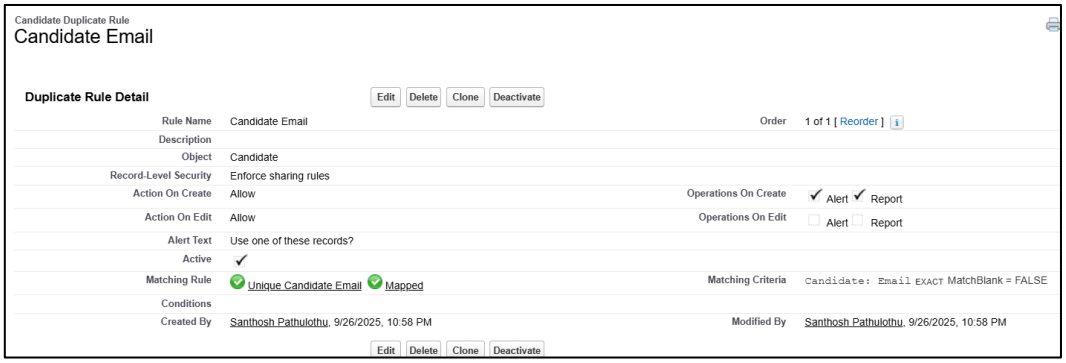
- **Use case in your project:** Import sample **Candidates, Jobs, Applications, Interviews** (CSV).
- **Steps:**
    1. Go to **Setup → Data Import Wizard**.
    2. Select Object (e.g., Candidate).
    3. Upload CSV (your test dataset).
    4. Map fields (e.g., CSV Email → Salesforce Email__c).
    5.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



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.

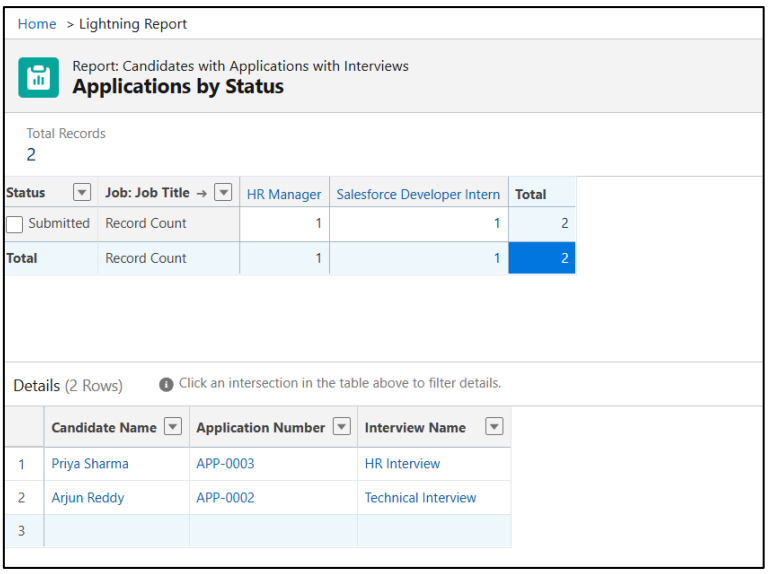




Phase 9 — Reporting, Dashboards

Step 1: Create a Report (Applications Pipeline)

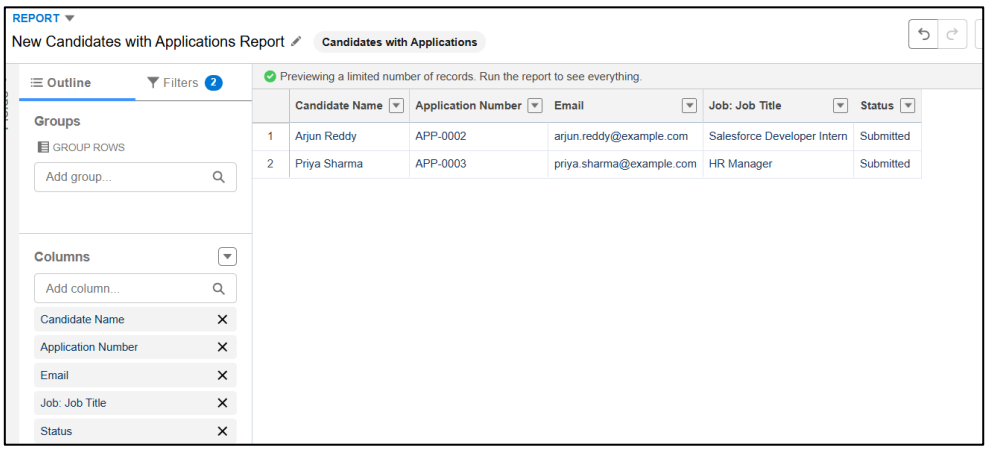
1. In Salesforce, go to the App Launcher (grid icon) → search Reports → click Reports.
2. Click New Report (top right).
3. In the report type search bar, type Applications → select Applications → click Continue.
4. By default, a table with some fields will appear.
5. Choose the format:
    - Tabular: 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__c to "Group Columns".
6. Click Save & Run.
    - Name = “Applications by Status”.
    - Folder = Public Reports (so others can see).



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.

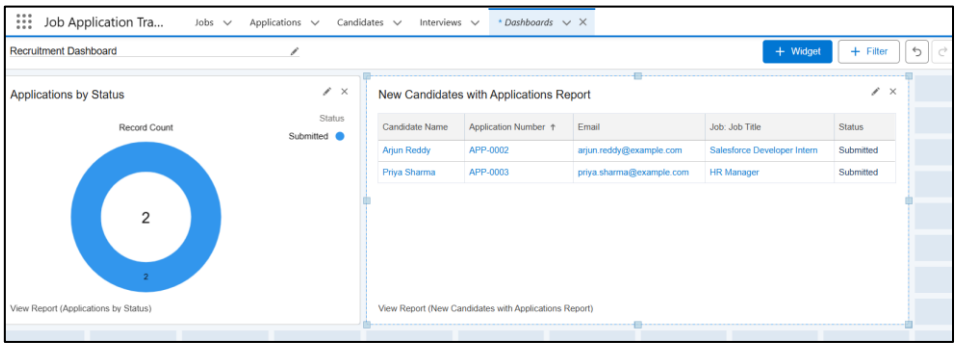
7. Save as “Candidates with Applications”.



Step 3: Create a Dashboard

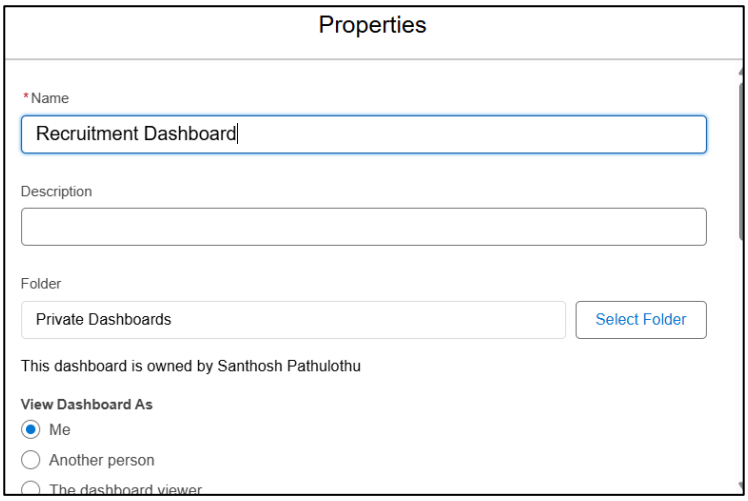
1. Go to App Launcher → search Dashboards → click Dashboards.
2. Click New Dashboard.
    - Name = “Recruitment Dashboard”.
    - Folder = Public Dashboards.
3. Click + Component.
    - Choose the Applications by Status report.
    - Display as Pie Chart → Show percentage of Submitted/Shortlisted/Hired/Rejected.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

Save → Done.



Step 4: Make it Dynamic

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



📌 What this does:

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