

PROJECT REPORT TEMPLATE

Job Application Tracking System Application using Salesforce

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?"

Creating a Salesforce Developer Org:

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

- Search Developer.salesforce.com
- Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.
- 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.
- Click save.
- Search login.salesforce.com
- By using username and password you can login to the salesforce org.
- 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
- Select the page layouts that should include this field.
- Click save.

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.

To create a custom object, follow these steps:

- From setup click on object manager.
- Click create, select custom object.
- Fill in the label as " Recruiter ".
- Fill in the plural label as " Recruiters".
- Record name: " Recruiter Number"
- Select the data type as "Auto Number".
- Under display format enter "REC-{0000}".
- Enter starting number as 1. 9. In the Optional Features section, select Allow Reports and Track Field History.
- In the Deployment Status section, ensure Deployed is selected.
- In the Search Status section, select Allow Search.
- In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
- Leave everything else as is, and click Save.

Fields:

Fields in Salesforce represents what the columns represent in relational data bases .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.

Create a new custom field:

- 1. Click the object manager tab, Select the object for which you have to create the fields and relationships.
- 2. From the sidebar, click Fields & Relationships. Notice that there are already some fields there. Those are the standard fields.
- 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
- 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.

Creation of Master-detail relationship:

- From Setup, go to Object Manager
- On the sidebar, click Fields & Relationships.
- Click New.
- Choose Master-detail Relationship and click Next
- Choose the related object and select that object.
- Enter the label and name for the lookup field
- Click Next, Next, and Save

Create a new custom field:

- From Setup, go to Object Manager
- On the sidebar, click Fields & Relationships.
- Click New.
- Choose the data type Text click next
- Enter the Field Label and field name click next
- Click next and save.

Create a tab

- Click setup
- Search tab in Quick box then, select tab
- Click New custom object tab
- Select the created object Recruiter and tab style for the new custom tab
- Select the profiles that visible in the tab
- Click on custom apps to make visible.
- Click save.

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.

Create a custom profile :

- From setup , enter profiles in Quick Find box
- Select profiles.
- Click clone.
- For Profile, enter Recruiter.
- Click save.

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

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.

- From Setup, enter Users in the Quick Find box, then select Users.
- Click New User.
- Enter First name as Hr and last name as Manager.
- 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.
- Then create a new role Hr Manager.
- Select user License as Standard Platform User.
- Select profile.
- Click save

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

1: Create a sharing rule

- Go to Sharing Settings, which can be found under the Quick Find section.
- 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.
- Add the label of the sharing rule you want to make.
- Select your rule type based on the criteria.
- Select the field can join immediately check field from the candidate object.
- Select the operator as equal and value is true.

- And in selecting the users to share with the section select roles and in that select Hr Manager.
- And in the section of select the level of access for the users give the access Read/Write.
- And save the rule

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.

Create a report:

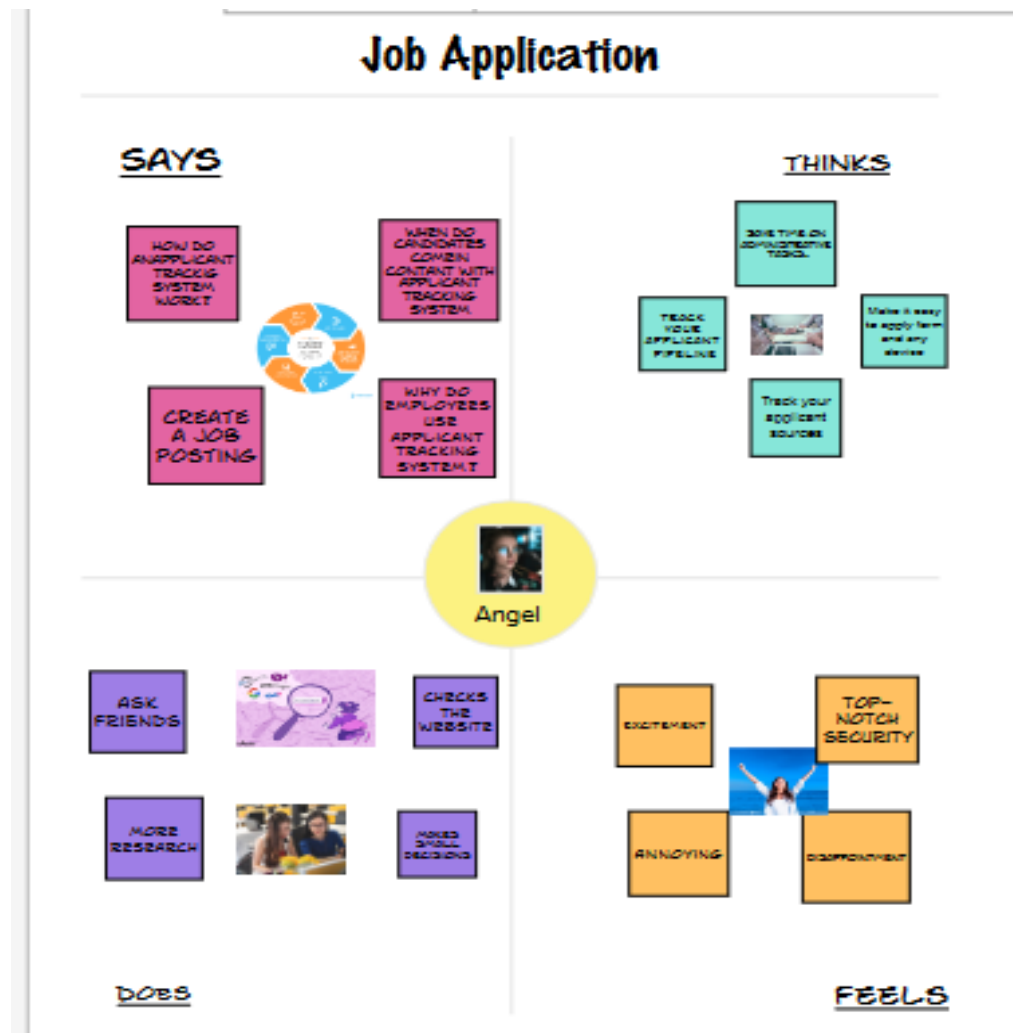
- ❖ Click on app launcher search for reports.
- ❖ Click on the new report and select the category has accounts and contacts.
- ❖ And the report type has accounts.
- ❖ In the details section select the option start report.
- ❖ In the filter pane select All accounts to show me.
- ❖ And All time is created.
- ❖ In the outline pane, group rows select Rating and in group columns select Account Name.
- ❖ In the columns section add Type and Billing city.
- ❖ Save the report by giving label name and save the folder as a public folder and save the report.

1.2 PURPOSE

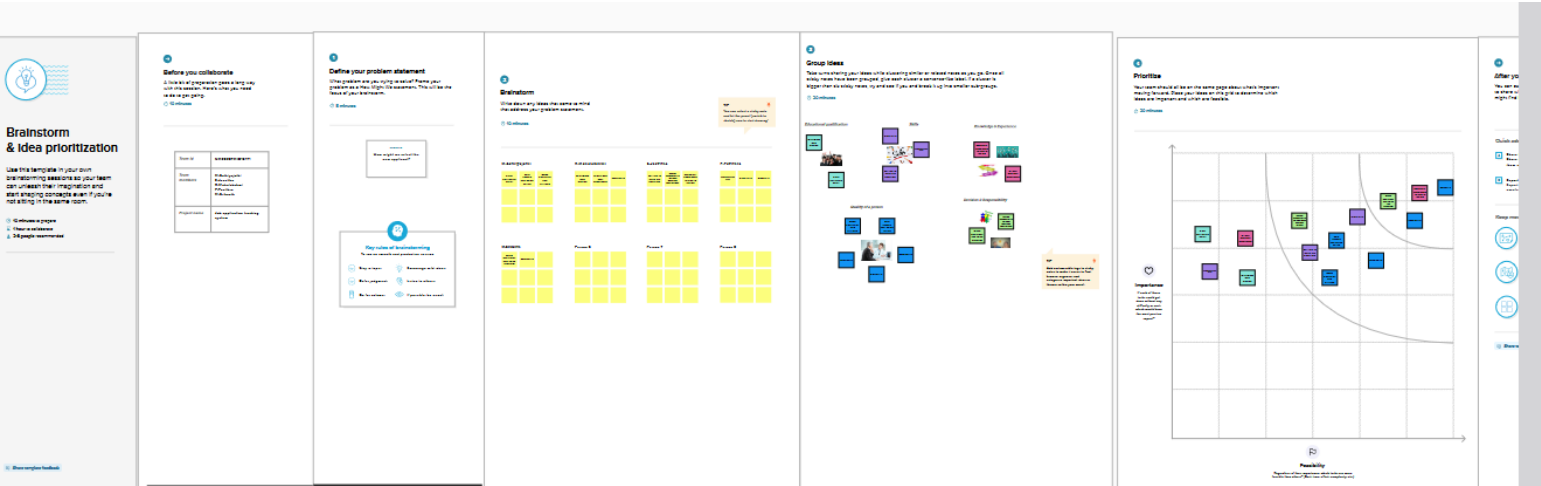
- ❖ A CRM Application which helps the applicant to track number of jobs and helps into find the job posted by the various recruiters, find the best attributes to be involved to run the process in a smooth way and easily to track.

PROBLEM DEFINITION AND DESIGN THINKING

EMPATHY MAP



IDEATION AND BRAINSTROMING MAP



Result

Object name	Field in the object	
	Field lable	Data type
Recruiter	Job title	Text name
jobs	Field lable	Data type
	Relation to recruiter	Master detail relationship

Jobs	Field lable	Data name
	Description	Text Area
Job Application	Field lable	Data name
	Location	text

Activity and screenshot

❖ OBJECT CREATION

The screenshot displays the Salesforce Object Manager interface. The browser address bar shows the URL: `https://ingcollege2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The main content area shows the Object Manager header with a 'Quick Find' search bar, 'Schema Builder' button, and 'Create' dropdown. Below this is a table listing standard objects.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	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			

The bottom of the screenshot shows the Windows taskbar with the search bar and various application icons. The system clock indicates the time is 1:29 PM on 4/12/2023.

Create a custom object, for Recruiter

The screenshot shows the Salesforce Object Manager interface for creating a custom object named 'Appointment Invitation'. The page is titled 'Step 2. Enter the details' and is part of a 4-step process. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main content area contains several input fields for defining the object's details:

- Field Label:** A text input field with a placeholder and an information icon.
- Length:** A text input field with a placeholder and an information icon.
- Field Name:** A text input field with a placeholder and an information icon.
- Description:** A large text area for entering a description.
- Help Text:** A text input field with a placeholder and an information icon.

At the top right of the main content area, there are navigation buttons: 'Previous', 'Next', and 'Cancel'. The browser's address bar shows the URL: `https://ingcollege2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/AppointmentInvitation/FieldsAndRelationships/new`. The Windows taskbar at the bottom shows the system clock as 2:55 PM on 4/12/2023.

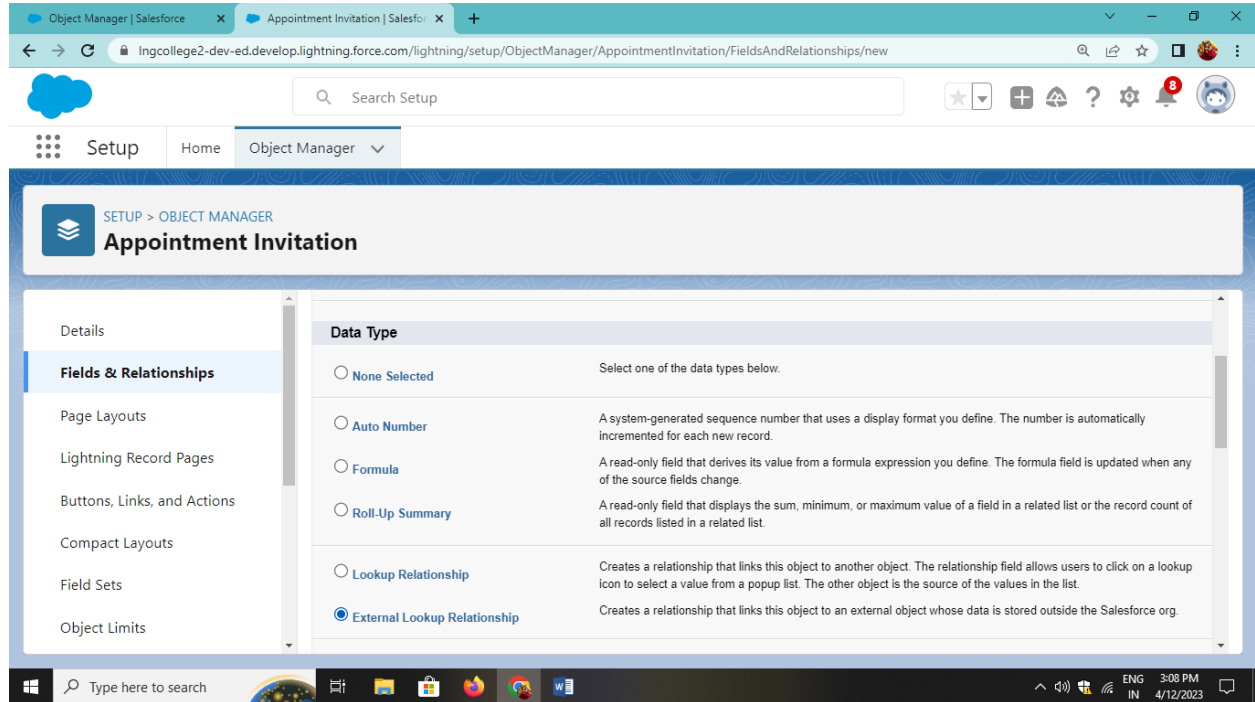
Create the custom fields

The screenshot shows the Salesforce Object Manager 'Object Manager' home page. The page title is 'Object Manager' with a subtitle '51+ Items, Sorted by Label'. The top right corner contains a 'Quick Find' search bar, a 'Schema Builder' button, and a 'Create' button with a dropdown arrow. The main content area displays a table of existing objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	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			

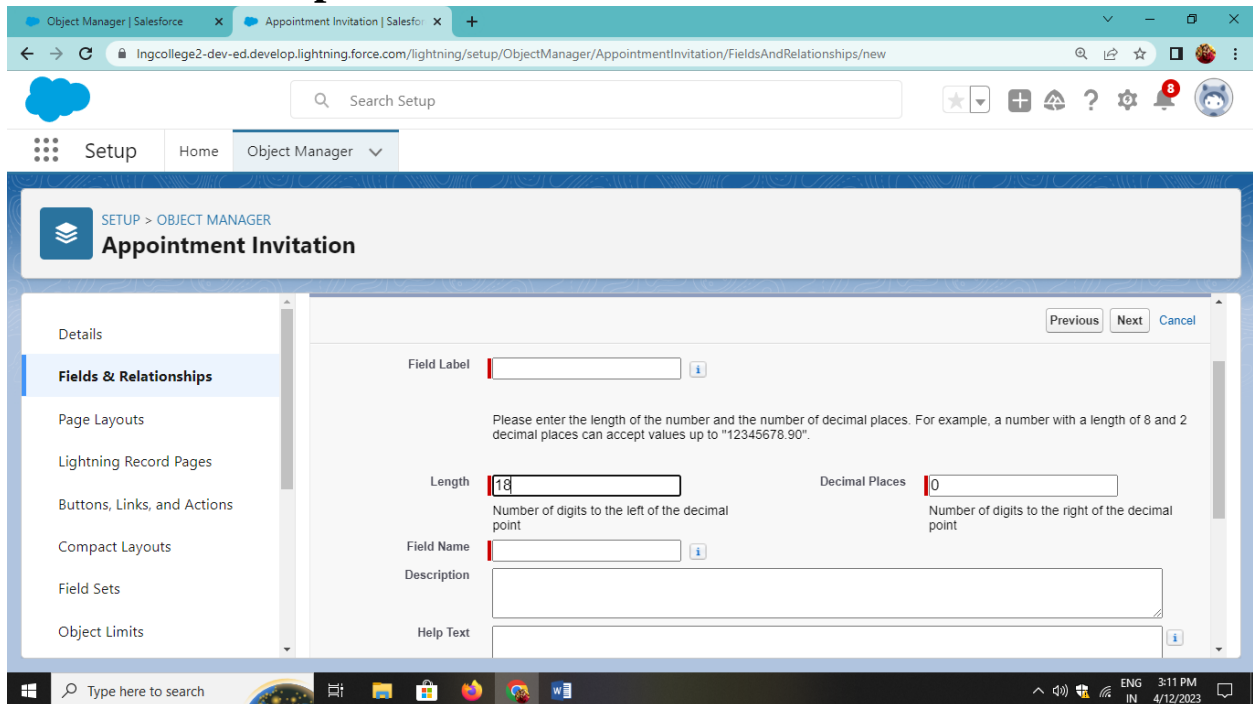
The browser's address bar shows the URL: `https://ingcollege2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The Windows taskbar at the bottom shows the system clock as 1:29 PM on 4/12/2023.

Creation of Master relationship



Create a new custom fields

Create a custom profile

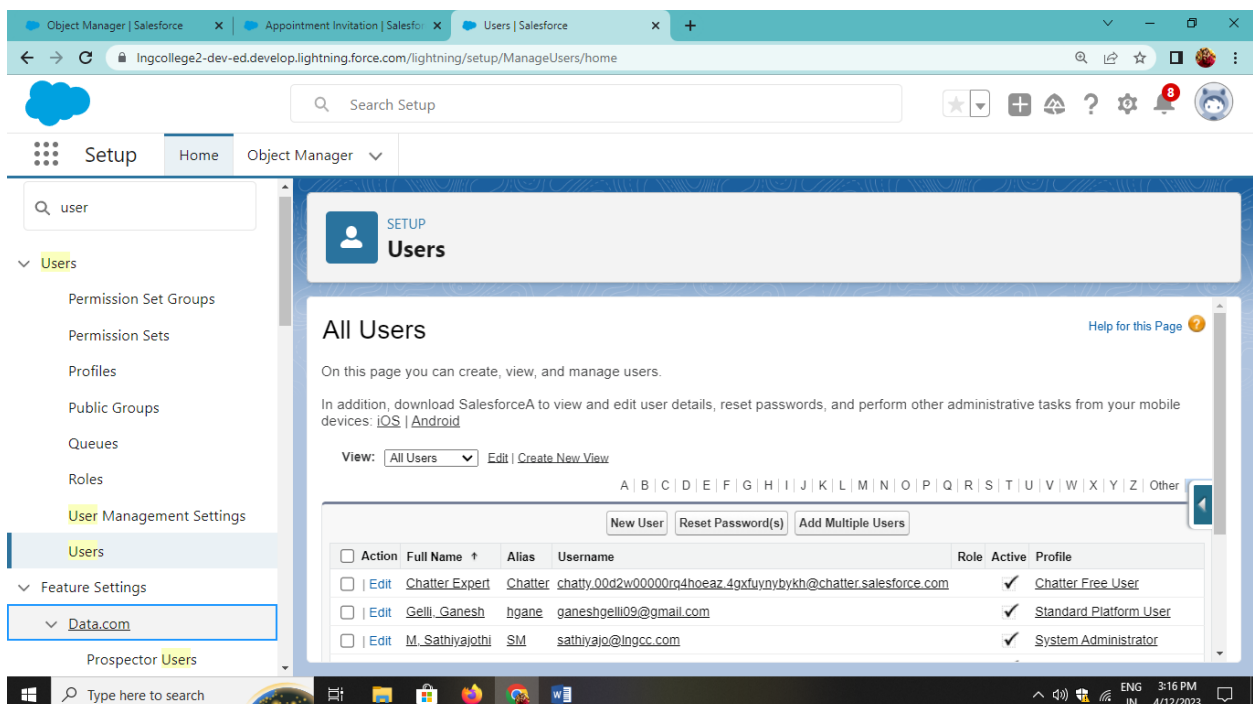


The screenshot shows the Salesforce Setup interface for creating a custom profile. The breadcrumb trail is **SETUP > OBJECT MANAGER > Appointment Invitation**. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main content area is titled **Appointment Invitation** and contains the following fields:

- Field Label**: A text input field.
- Length**: A text input field with the value **18**. Below it, a description reads: "Number of digits to the left of the decimal point".
- Decimal Places**: A text input field with the value **0**. Below it, a description reads: "Number of digits to the right of the decimal point".
- Field Name**: A text input field.
- Description**: A text area.
- Help Text**: A text input field.

At the top right of the main content area, there are buttons for **Previous**, **Next**, and **Cancel**. The browser's address bar shows the URL: `https://ingcollege2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/AppointmentInvitation/FieldsAndRelationships/new`. The Windows taskbar at the bottom shows the time as 3:11 PM on 4/12/2023.

User



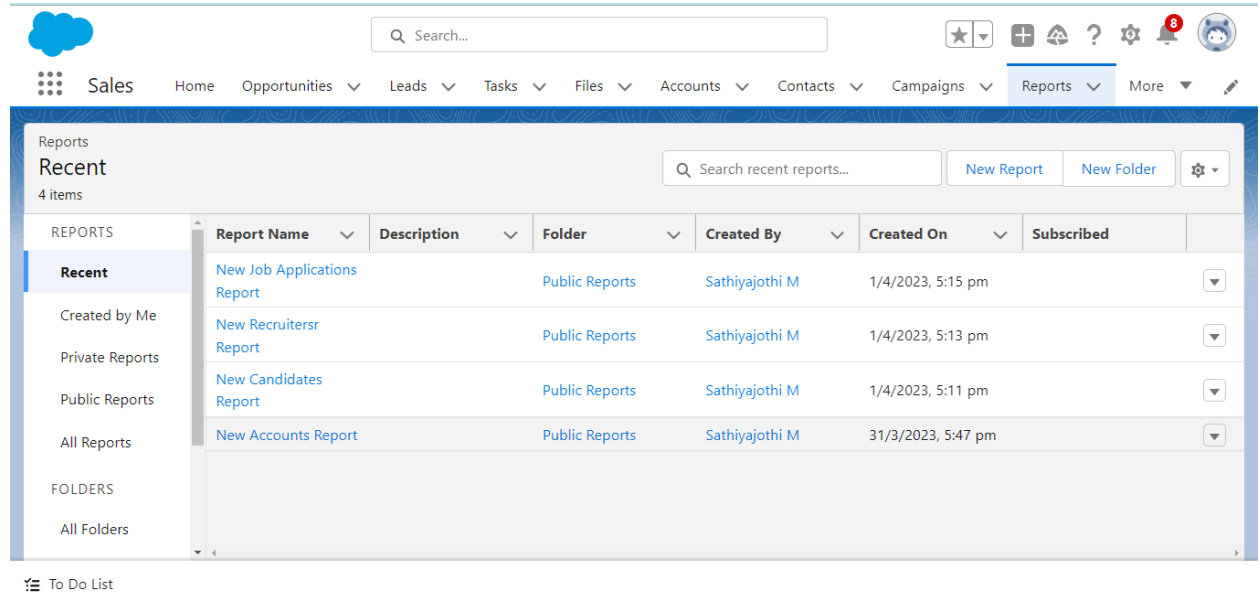
The screenshot shows the Salesforce Setup interface for managing users. The breadcrumb trail is **SETUP > Users**. The left sidebar contains a navigation menu with the following items: user (searched), Users (selected), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled **All Users** and contains the following information:

- On this page you can create, view, and manage users.**
- In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android**
- View:** **All Users** (selected) | [Edit](#) | [Create New View](#)
- Navigation:** [A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#) | [Other](#)
- Buttons:** [New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)
- Table:**

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty_00d2w00000r04hoeaz_4gxufuynvbykh@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	Gelli Ganesh	hgane	ganeshgelli09@gmail.com		✓	Standard Platform User
<input type="checkbox"/>	Edit	M. Sathiyajothi	SLM	sathiyajo@ingcc.com		✓	System Administrator

The Windows taskbar at the bottom shows the time as 3:16 PM on 4/12/2023.

Report



4. Trailhead Profile Public URL

team lead-<https://trailblazer.me/id/sjothi25>

team member1-<https://trailblazer.me/id/mahalakshmi23>

team member2- <https://trailblazer.me/id/appu12>

team member3- <https://trailblazer.me/id/jeevi01>

team member4- <https://trailblazer.me/id/pavi275>

5. ADVANTAGES AND DISADVANTAGES

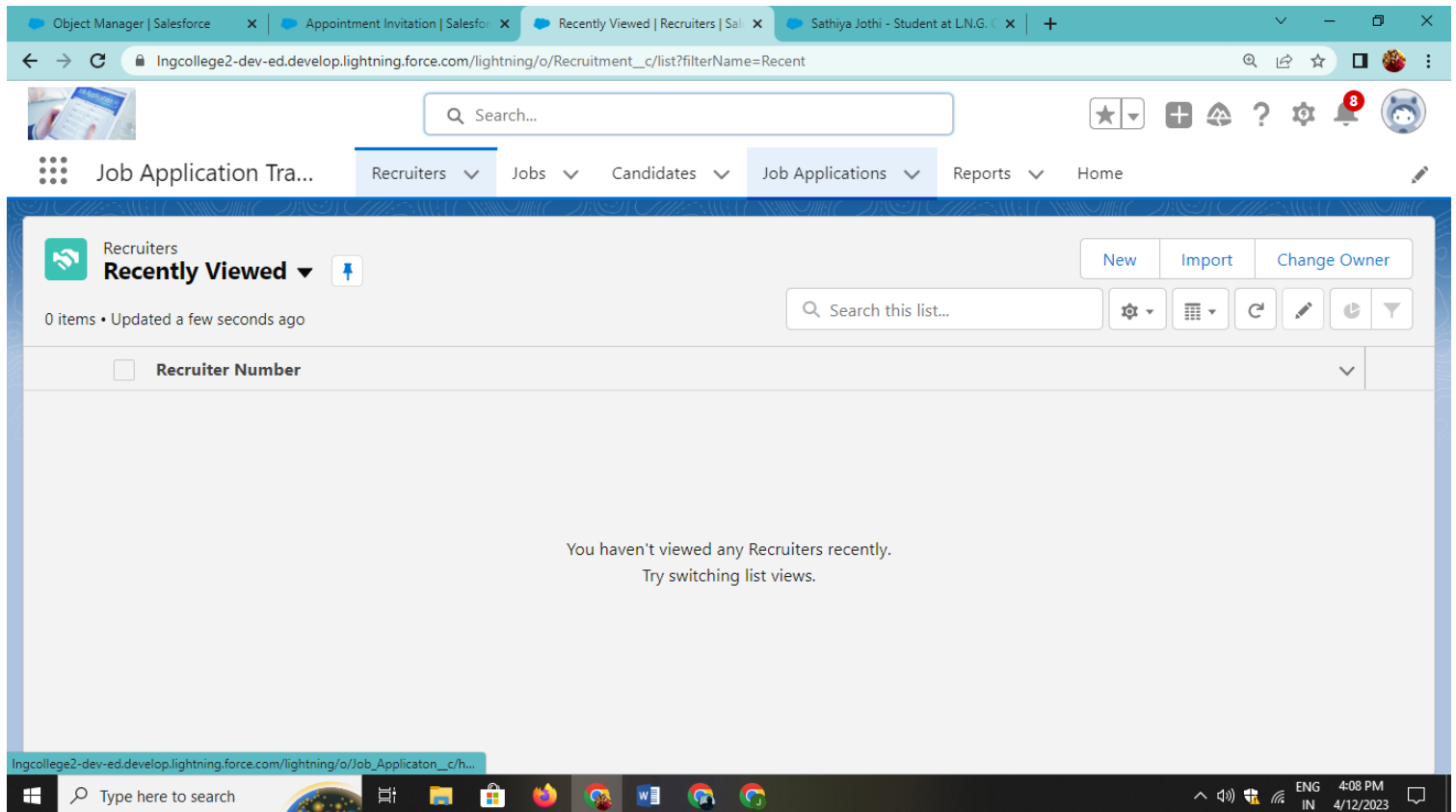
Advantage	Disadvantage
The biggest applicant tracking system advantage is streamlined hiring process	A disadvantage of ATS is missing qualified application due to wrong keyword selection
Improved quality of hire is another advantage of ATS	Automatic elimination of resumes that software cannot recognize and interpret is another drawback of ATS

Strong employer brand is another advantage of an ATS

An applicant tracking system disadvantage is that they are open to manipulation

6. APPLICATIONS

An Applicant Tracking System or ATS is an all in one human resource software that automates the hiring process, helps HR teams efficiently manage every part of recruitment and solves recruiters challenges and pain points.



7. CONCLUSION

A very effective hiring solution that most of the successful recruiters utilize. Because without it, there is a good chance that your process of moving applicants through different stages can become very difficult.

8.FUTURE SCOPE

The world knows is moving into automation and AI, and leads way to the new age applicant Tracking system(ATS). Read further to understand what the future might be like for the ATS.

The world knows that applicant tracking Systems(ATS) made their way into the recruitment domain just a few years ago. Although, previously, ATS solutions were implemented only by a few companies that could bear the heavy investment costs, now their use in the HR arena has risen to a great extent.