Job Application Tracking system using Sales Force

1.Introduction

- **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.**

- **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.**

- **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?".**

  1.1 Overview

  - **Track the applications of your potential employees and streamline your recruitment processes via Recruit.**
  - ***It is the employees that directly or indirectly contribute to the growth of an organization.***

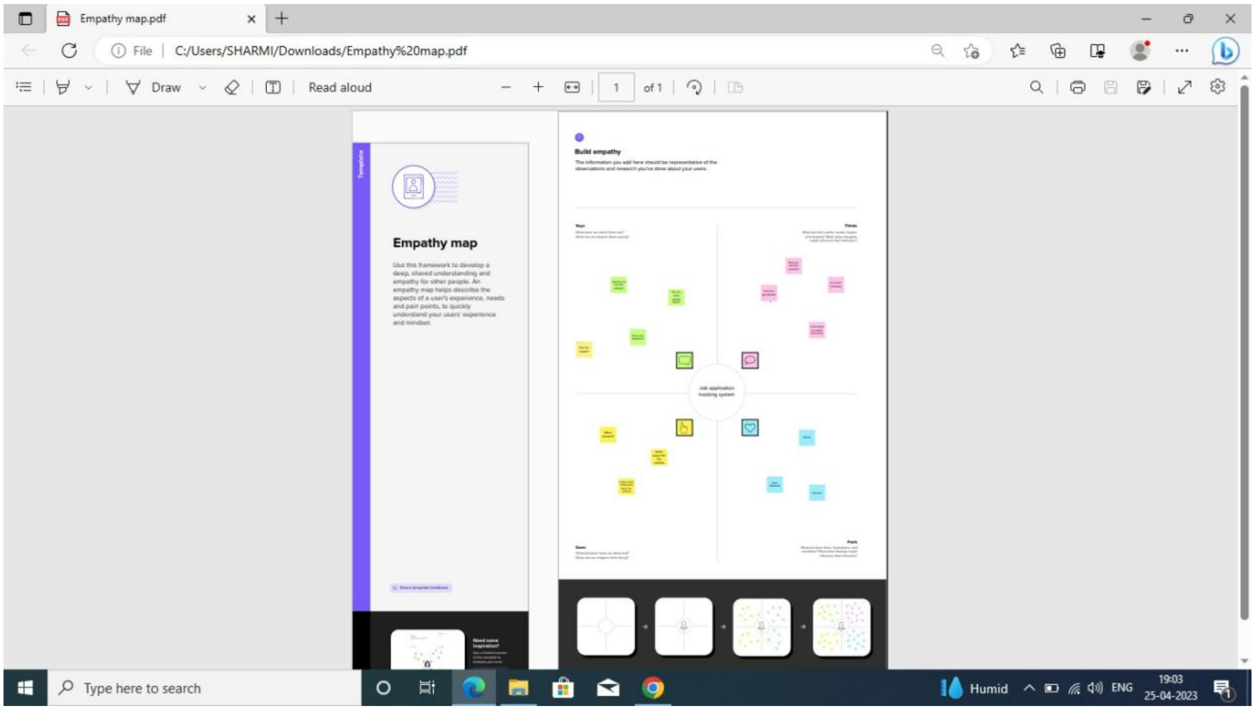
  1.2 Purpose

  - **The Salesforce recruitment app helps you automate recruitment workflows through seamless process automation.**
  - **From the moment you receive an application and add it to the ATS, the tool allows you to process and analyze the same with increased automation and accuracy.**

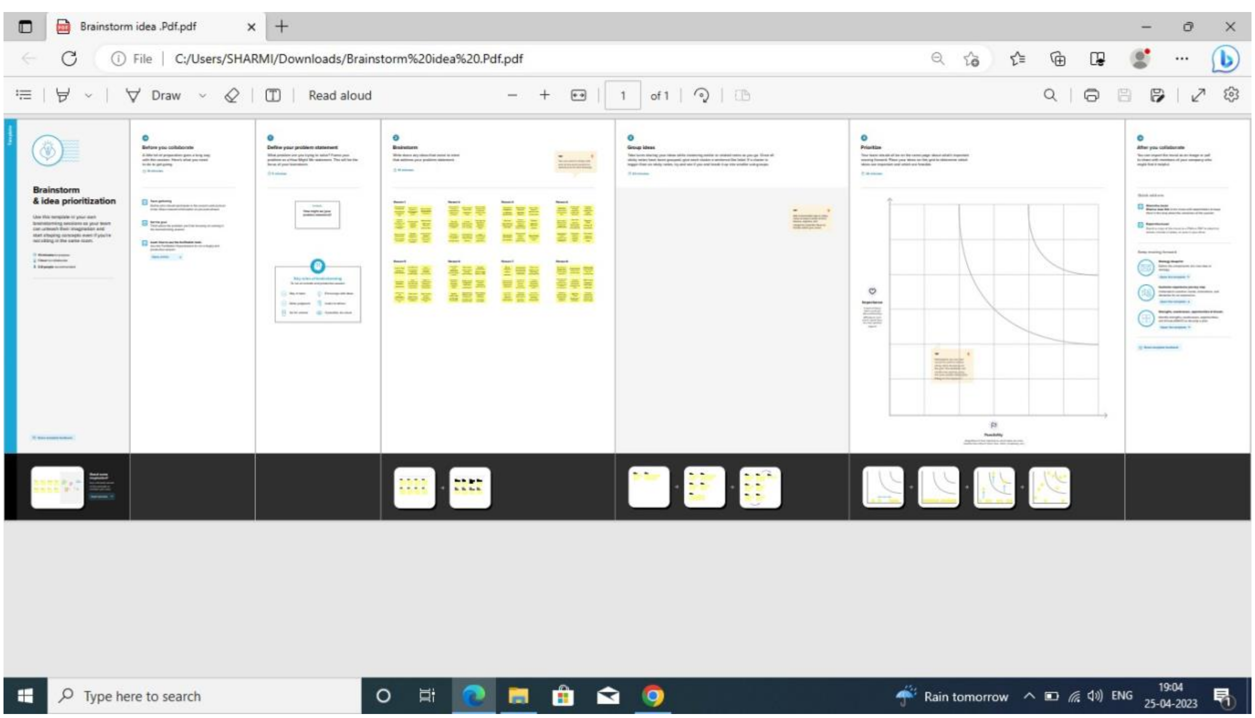
  2.Problem Definition and Design Thinking

  - *Salesforce is a CRM, so it helps in managing your client's relations. Applicant tracking system is the same, but for managing the relations with your candidates. Traffit is a great example of an applicant tracking system.*

  2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3.Result

The project says about the Job Application Tracking System and the user experience.

3.1 Data Model:

Object name	Field Label	Data Type
Object 1 Recuiter	created by	Lookup
	Last modified by	Lookup
	Owner	Date/Time
	Recuiter Number	Auto number
Object 2 Candidates	Candidate	Text
Object 3 Job	jobs number	Auto number
	Created by	Lookup
	Last modified by	Lookup

Object 4	Field Label	Data Type
Job application Object	Job application object number	Auto number
	Created by	Lookup
	Owner	Lookup
	Last modified by	Lookup

Object 5	**Field Label**	**Data Type**
Tab	**Tab Number**	**Auto Number**
	Tab	**Text**

3.2 Milestone and Activity:

Milestone 1-Sales Force

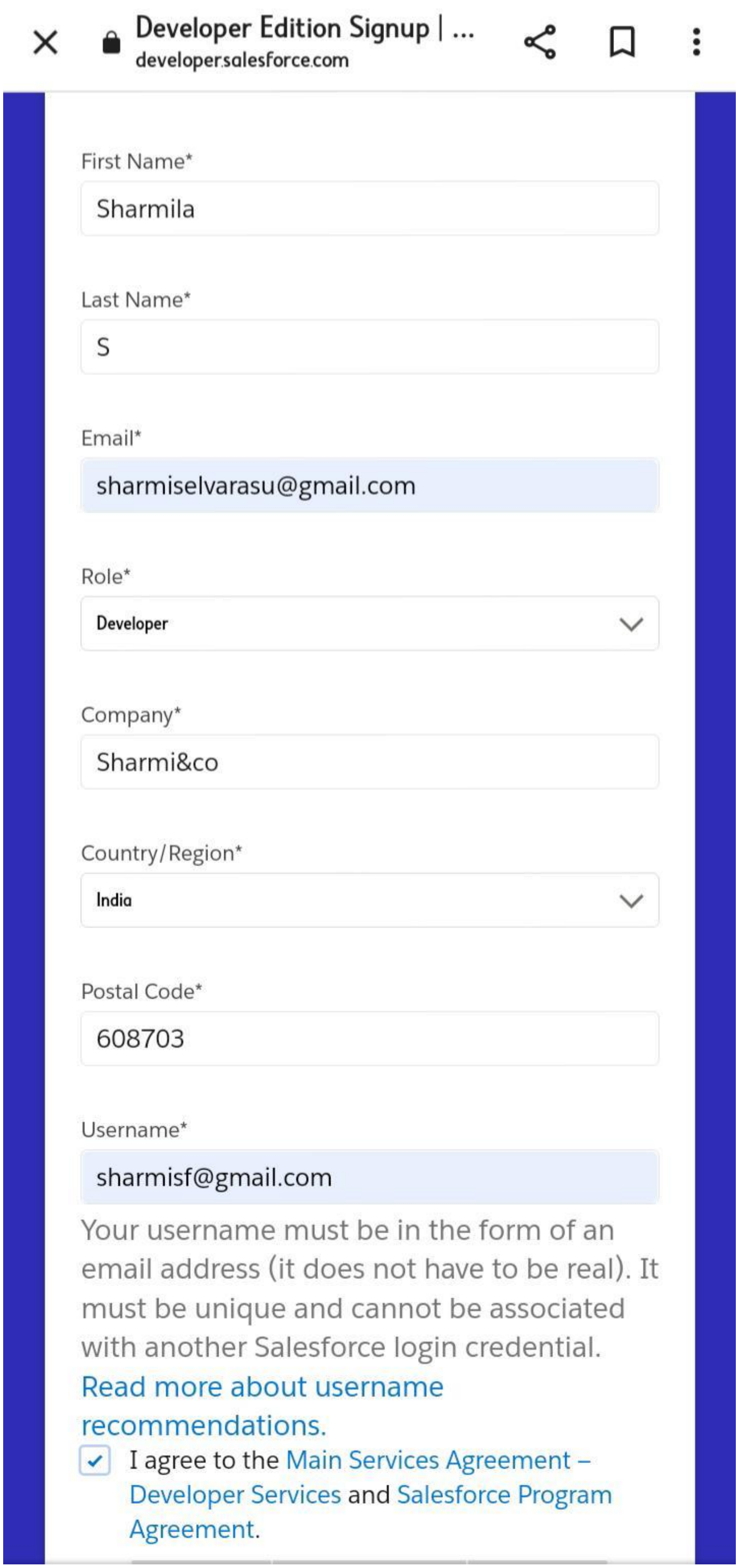
- **Sales force is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.**
- **Sales force has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.**

Activity-1

Creating a sales force Developer org:

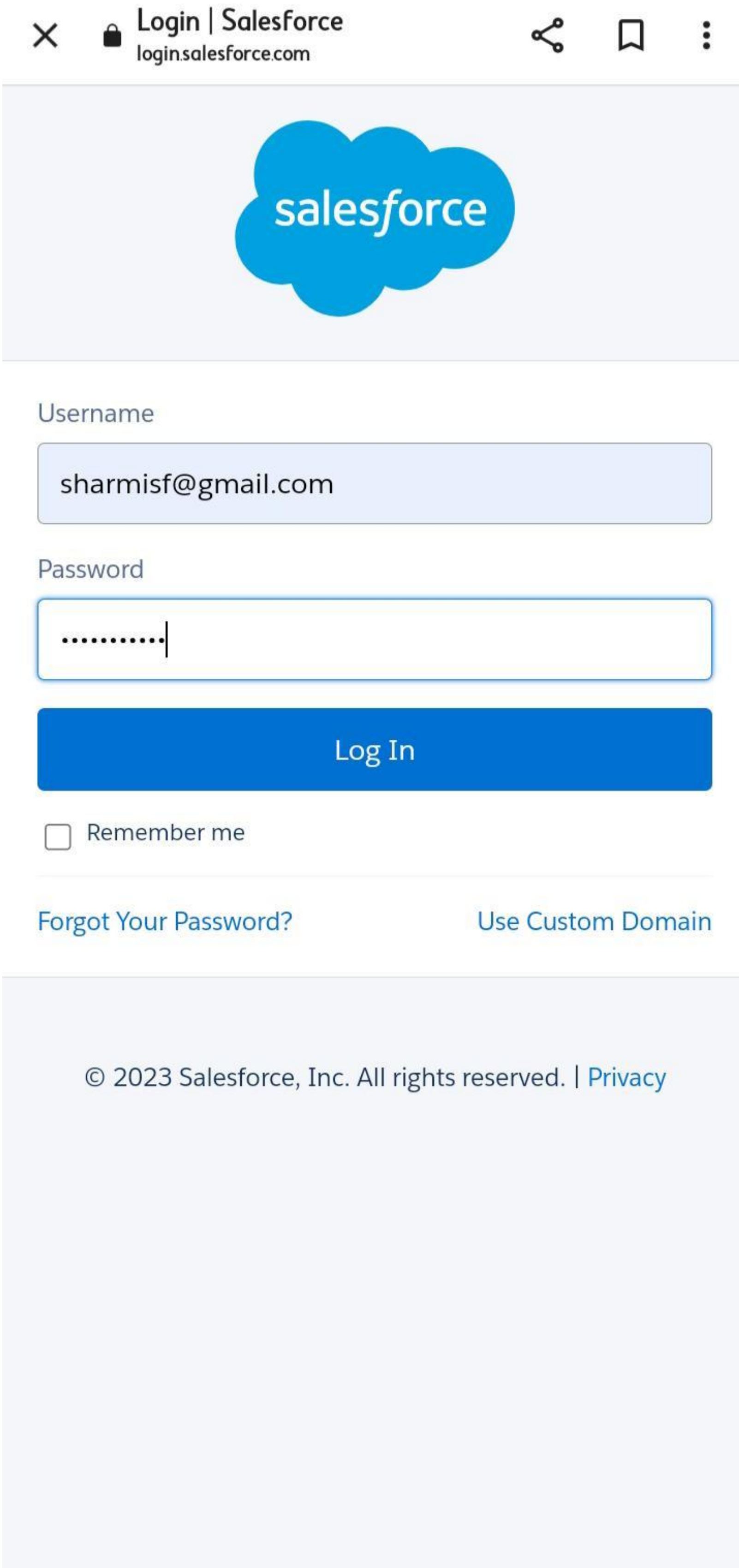
- **Search Developer.salesforce.com**

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

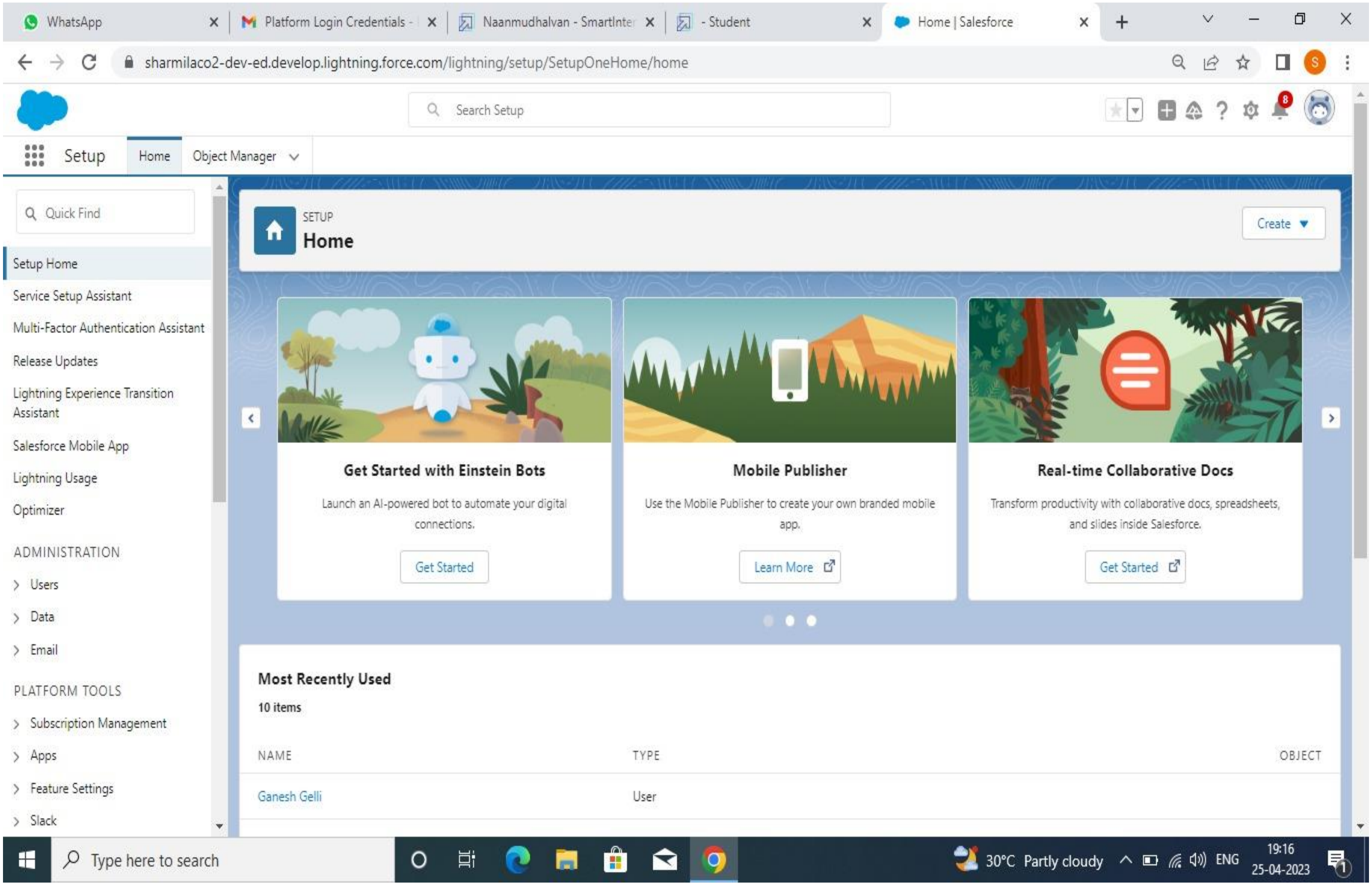

Developer Edition Signup | ...
developer.salesforce.com
First Name*
Sharmila
Last Name*
S
Email*
sharmiselvarasu@gmail.com
Role*
Developer
Company*
Sharmi&co
Country/Region*
India
Postal Code*
608703
Username*
sharmisf@gmail.com
Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential.
Read more about username recommendations.
I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.

- *Click sign me up after a few min you will reserve a mail sales force*

  Org and by using the verify account link you can create your new password.
- *Click save button.*
- *Search login.salesforce.com*
- *By using username and password you can into the sales force org.*



- *The setup page will appear as below.*



Milestone 2-Object

- *Sales force objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).*
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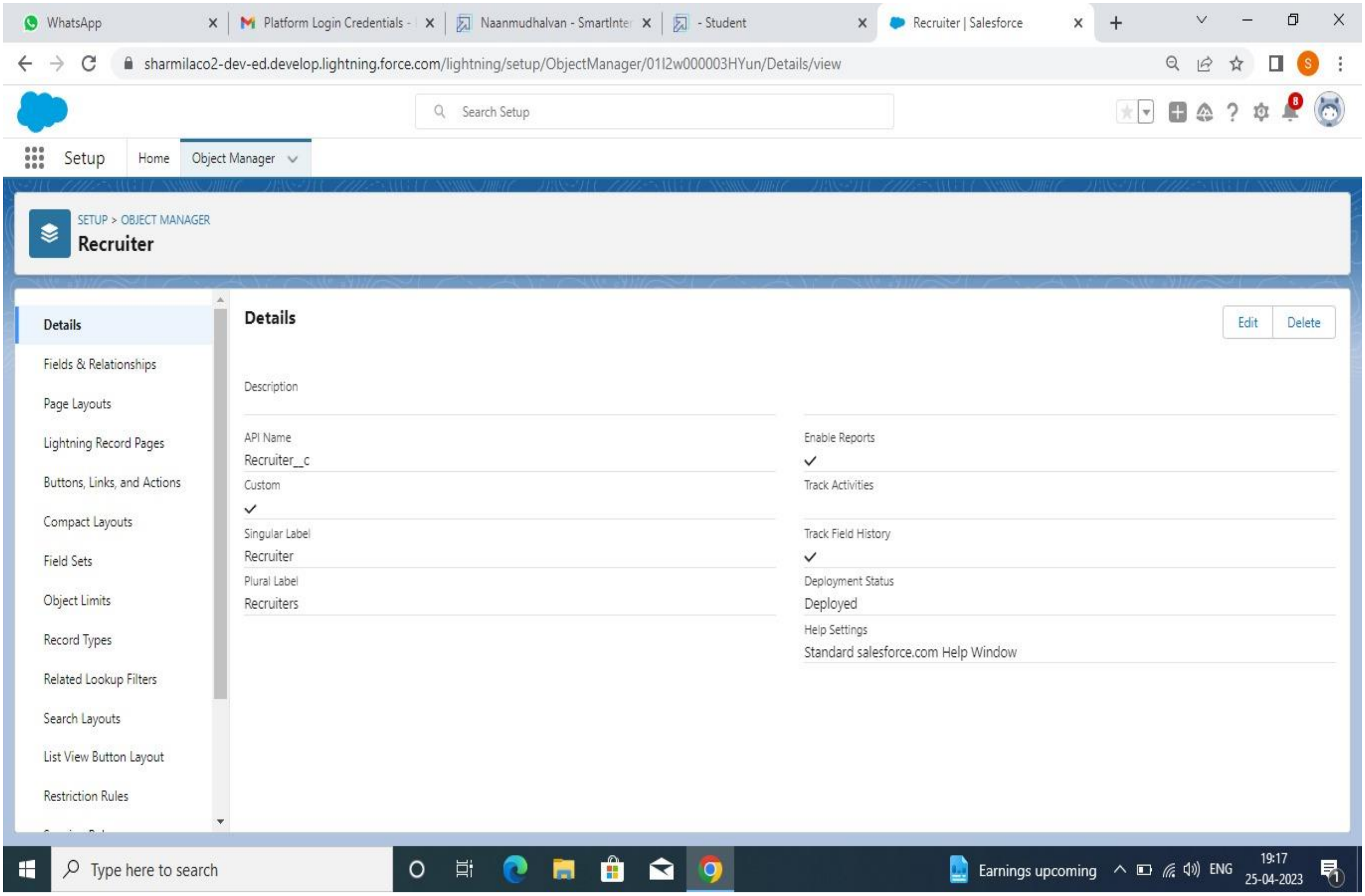
- ***Sales force objects are of two types:***
-
- ***Standard Objects:***
- ***Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.***
-
- ***Custom Objects:***
- ***Custom objects are those objects that are created by users. 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 objects for Recruiter

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



Activity -2

Create a jobs

1. **From setup click on object manager.**
2. **Click create, select custom object.**
3. **Fill in the label as " Job".**
4. **Fill in the plural label as " Jobs".**
5. **Record name: " Job Number"**
6. **Select the data type as "Auto Number".**

7. **Under display format enter “REC-{0000}”.**

8. **Enter starting number as 1.**

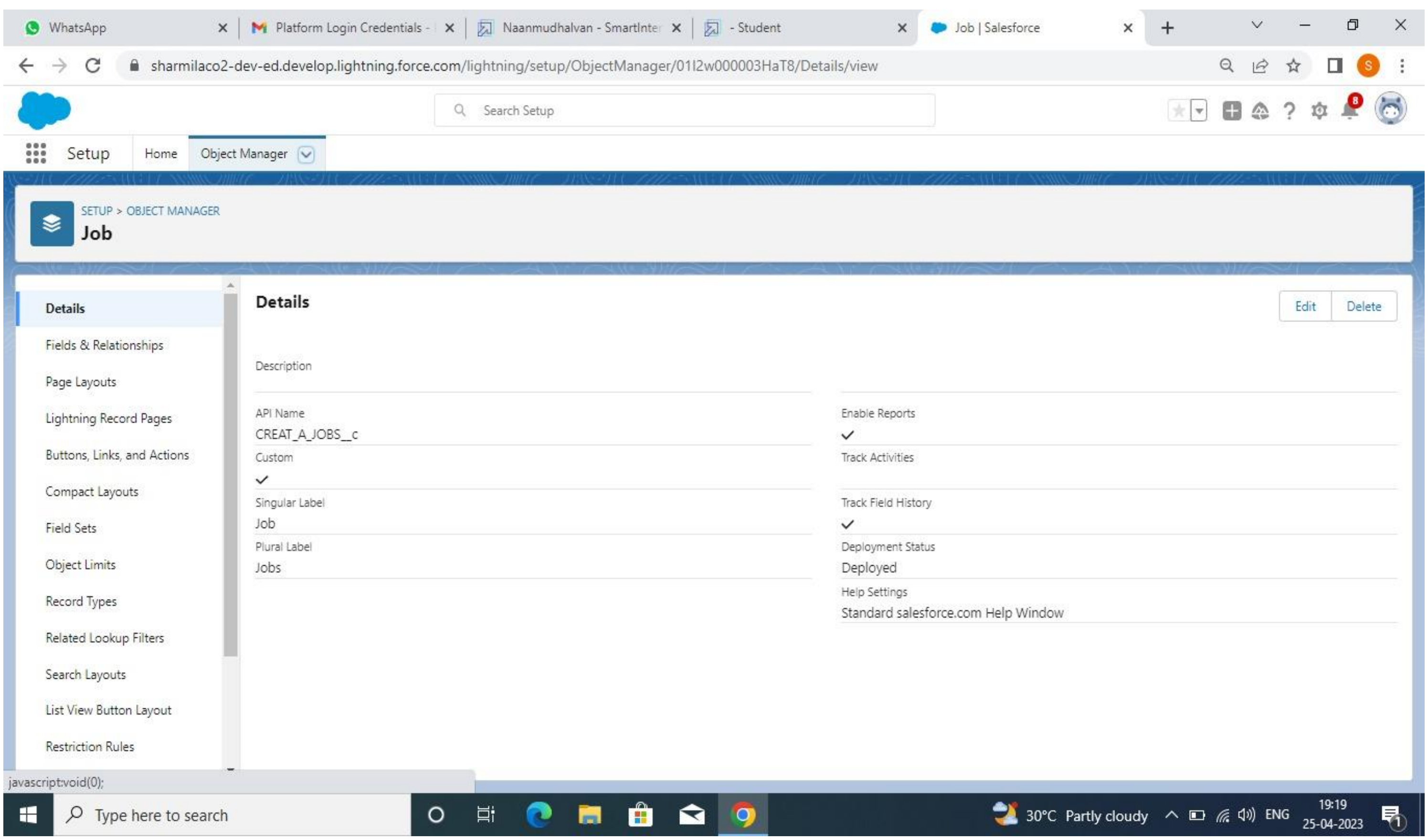
9. **In the Optional Features section, select Allow Reports and Track Field History.**

10. **In the Deployment Status section, ensure Deployed is selected.**

11. **In the Search Status section, select Allow Search.**

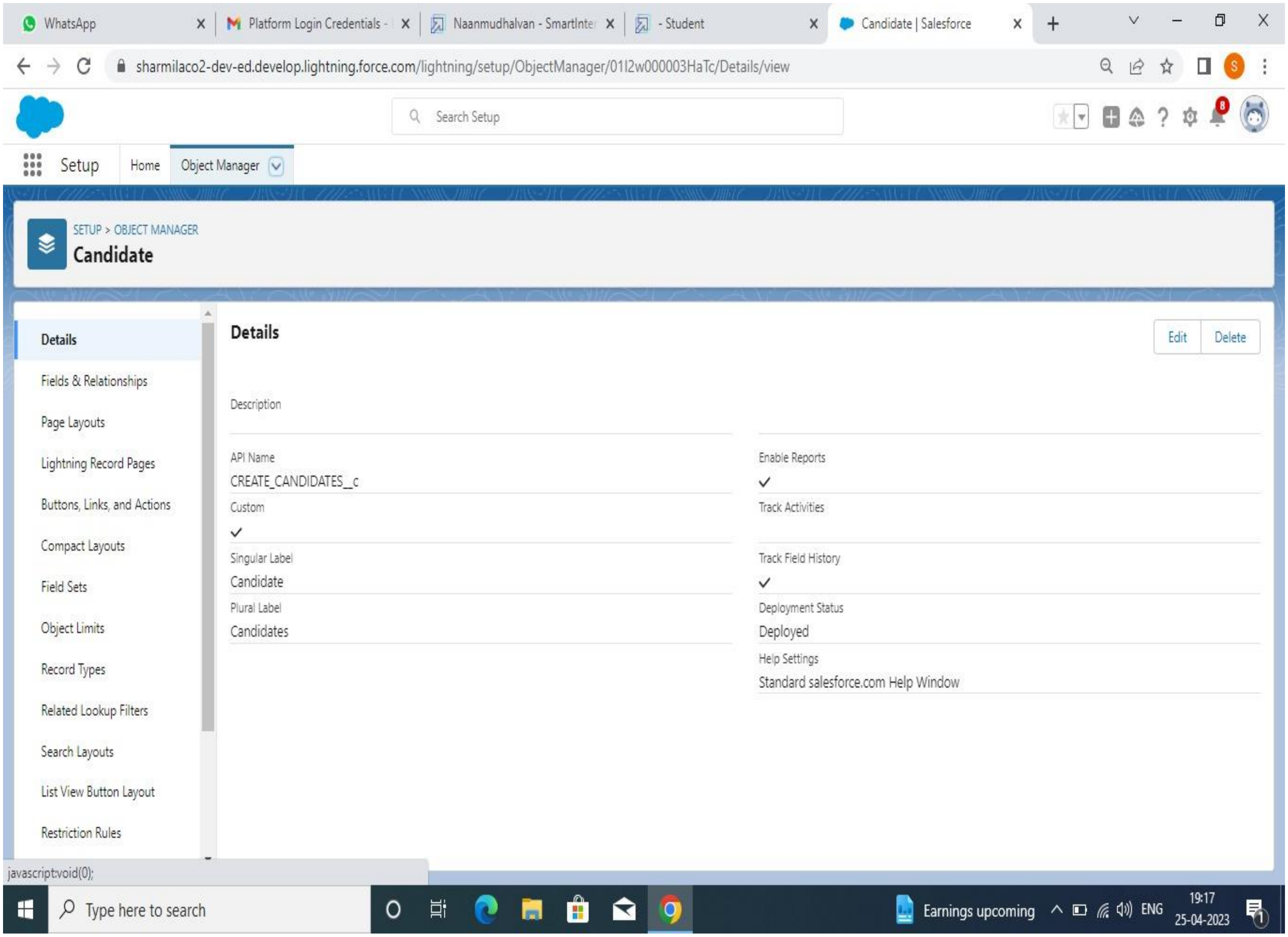
12. **In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.**

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



Activity -3
Create a Candidate

1. **From setup click on object manager.**
2. **Click create, select custom object.**
3. **Fill in the label as " Candidate".**
4. **Fill in the plural label as " Candidates".**
5. **Record name: " Candidate 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.**
13. **Leave everything else as is, and click Save.**



Activity -4
Create a Job Application object

1. **From setup click on object manager.**

2. **Click create, select custom object.**

3. **Fill in the label as “ Job Application object”.**

4. **Fill in the plural label as “ Jobs application object”.**

5. **Record name: “ Job application object Number”**

6. Select the data type as “Auto Number”.

7. Under display format enter “REC-{0000}”.

8. Enter starting number as 1.

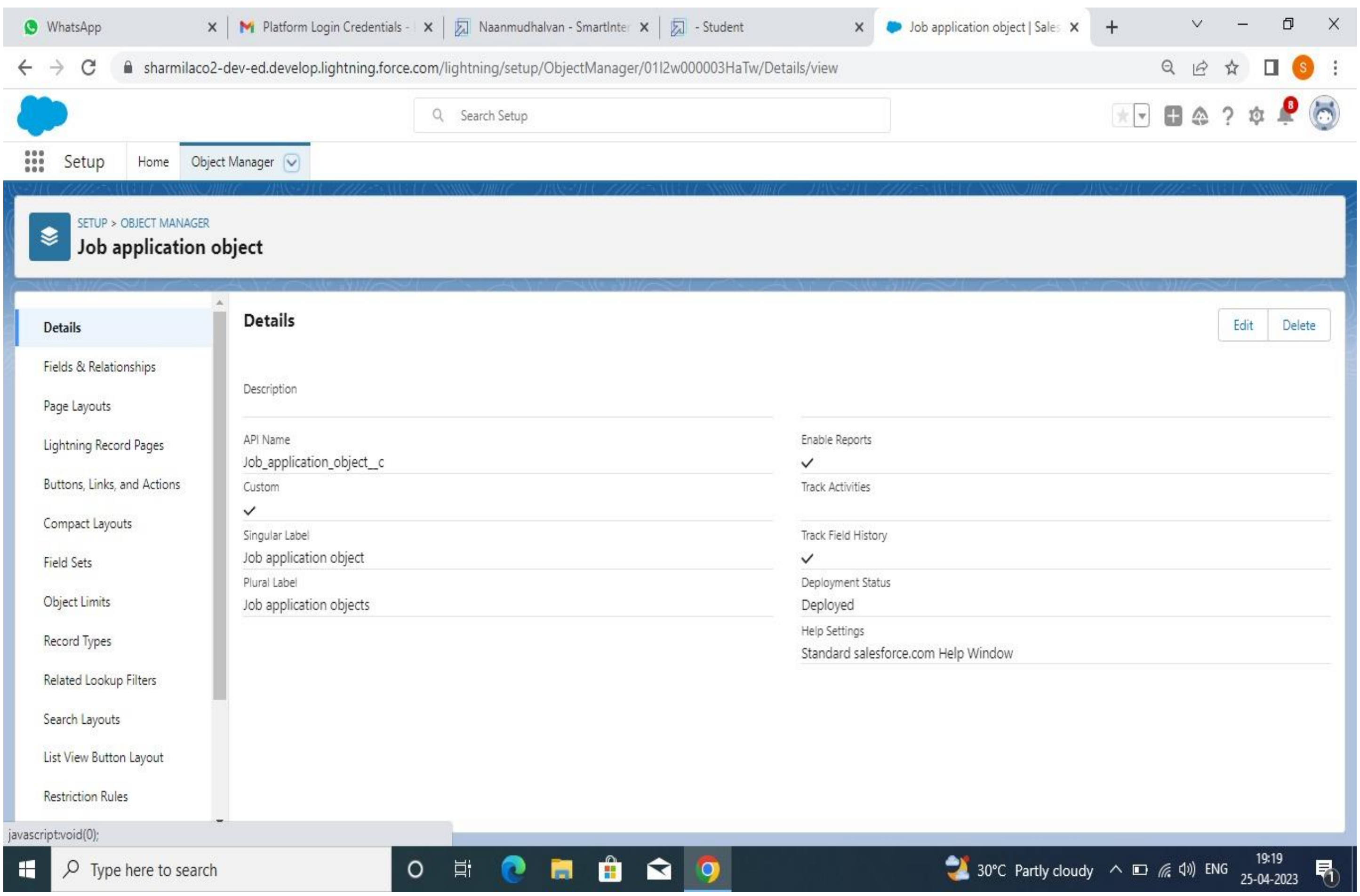
9. In the Optional Features section, select Allow Reports and Track Field History.

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.

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



Activity-5

Create a Tab

1. **From setup click on object manager.**

2. **Click create, select custom object.**

3. **Fill in the label as “ Tab”.**

4. **Fill in the plural label as “ Tabs”.**

5. **Record name: “ Tab Number”**

6. **Select the data type as “Auto Number”.**

7. **Under display format enter “REC-{0000}”.**

8. **Enter starting number as 1.**

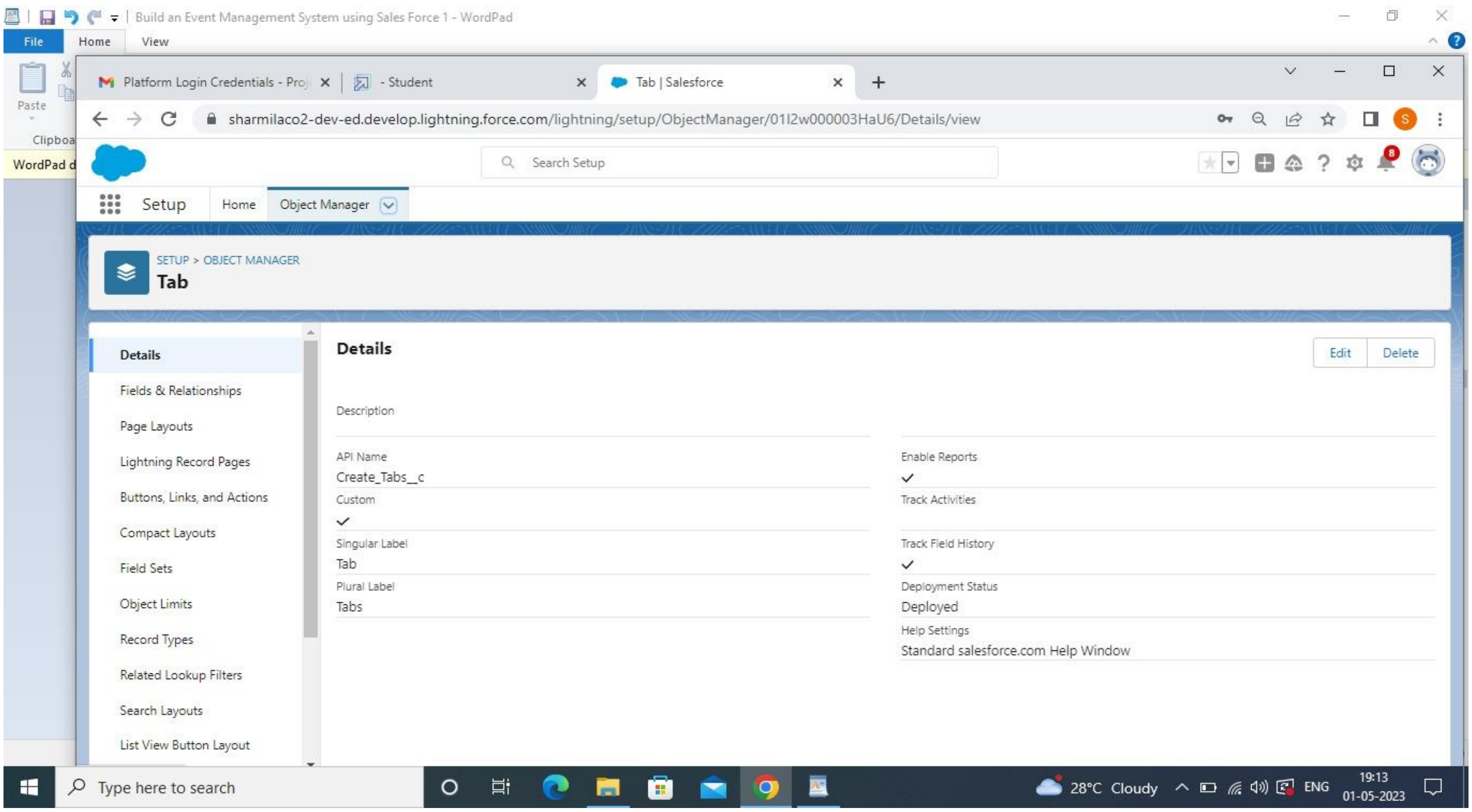
9. **In the Optional Features section, select Allow Reports and Track Field History.**

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.

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



Milestone 3-Fields

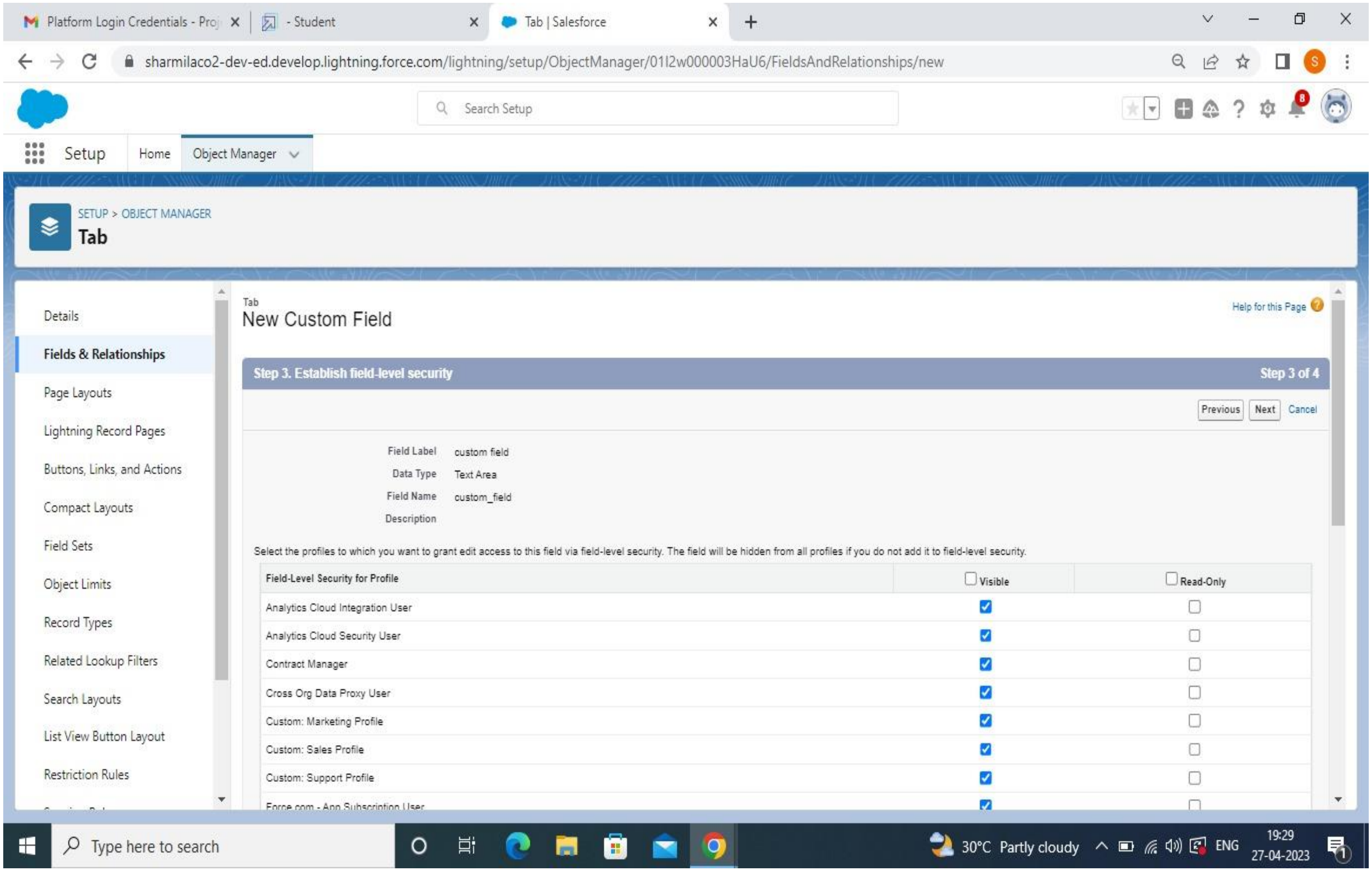
Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

- **1. 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.**

- **2. 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 field

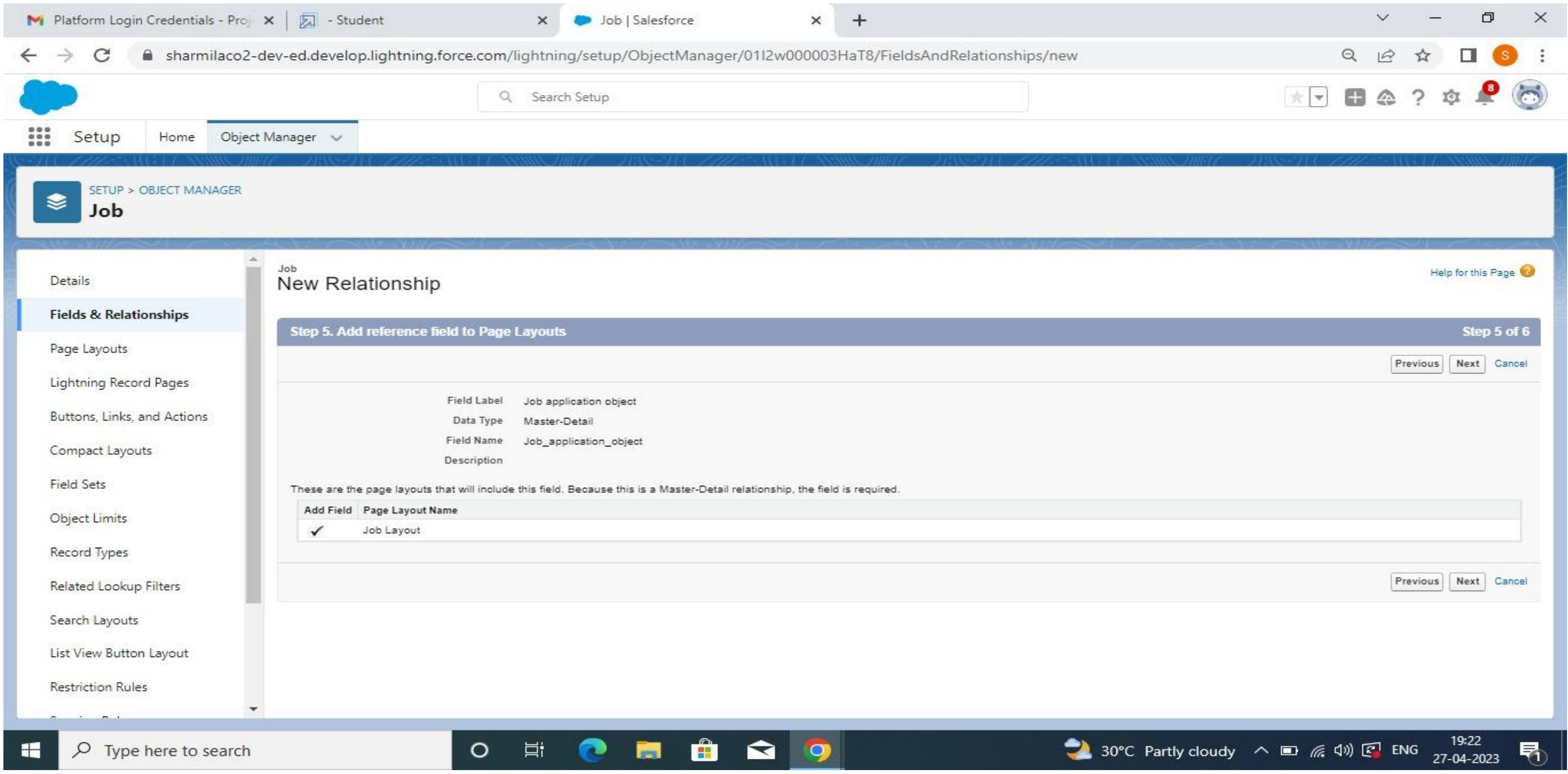
1. **Click the object manager tab, Select the object for which you have to create the fields and relationships.**
2. **From the sidebar, click Fields & Relationships. Notice that there are already some fields there. Those are the standard fields.**
3. **Click New to create a custom field. Tip: Before 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.**



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.**

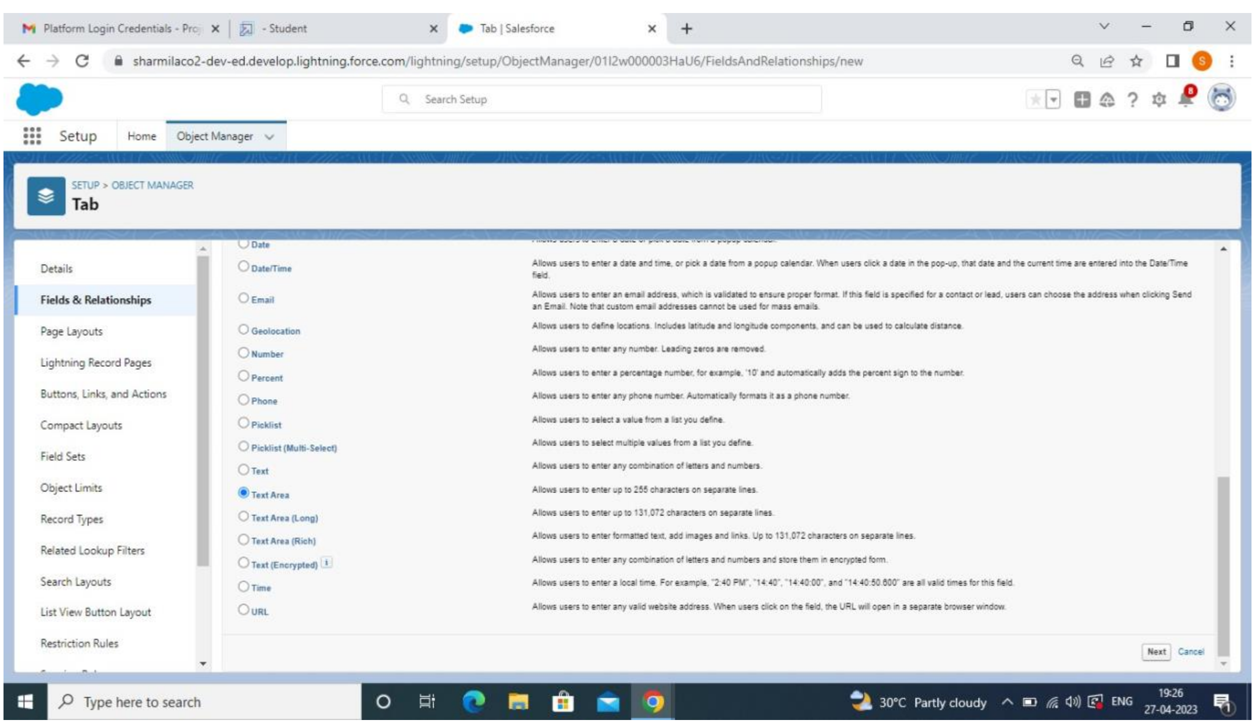


Activity-3

Create a New Custom field

From Setup, go to Object Manager

2. On the sidebar, click Fields & Relationships.



3. Click New.

4. Choose the data type Text Area click next

5. Enter the Field Label and field name click next

6. Click next and save.

Activity -4
Create a New Custom field
From Setup, go to Object Manager

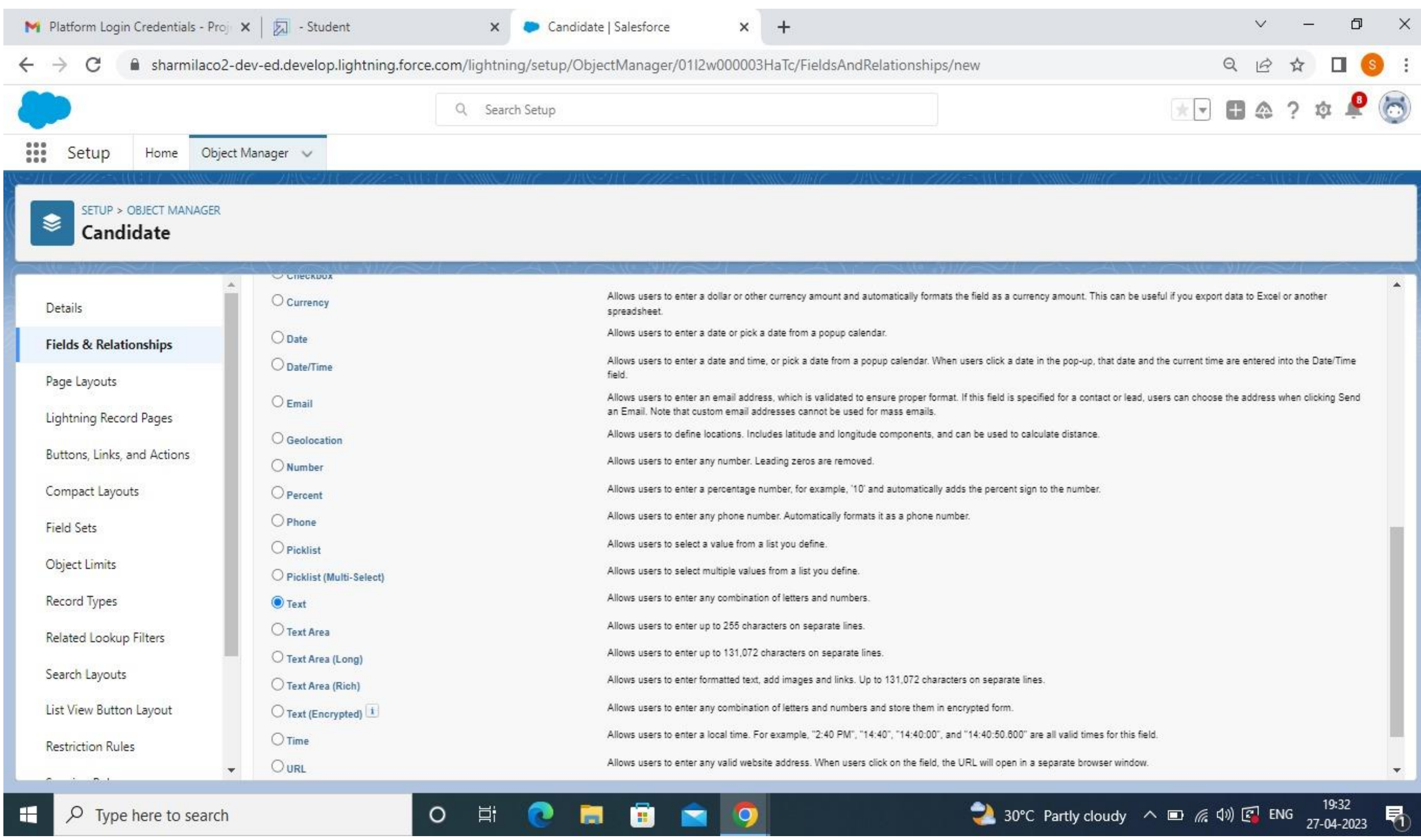
2. On the sidebar, click Fields & Relationships.

3. Click New.

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

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**

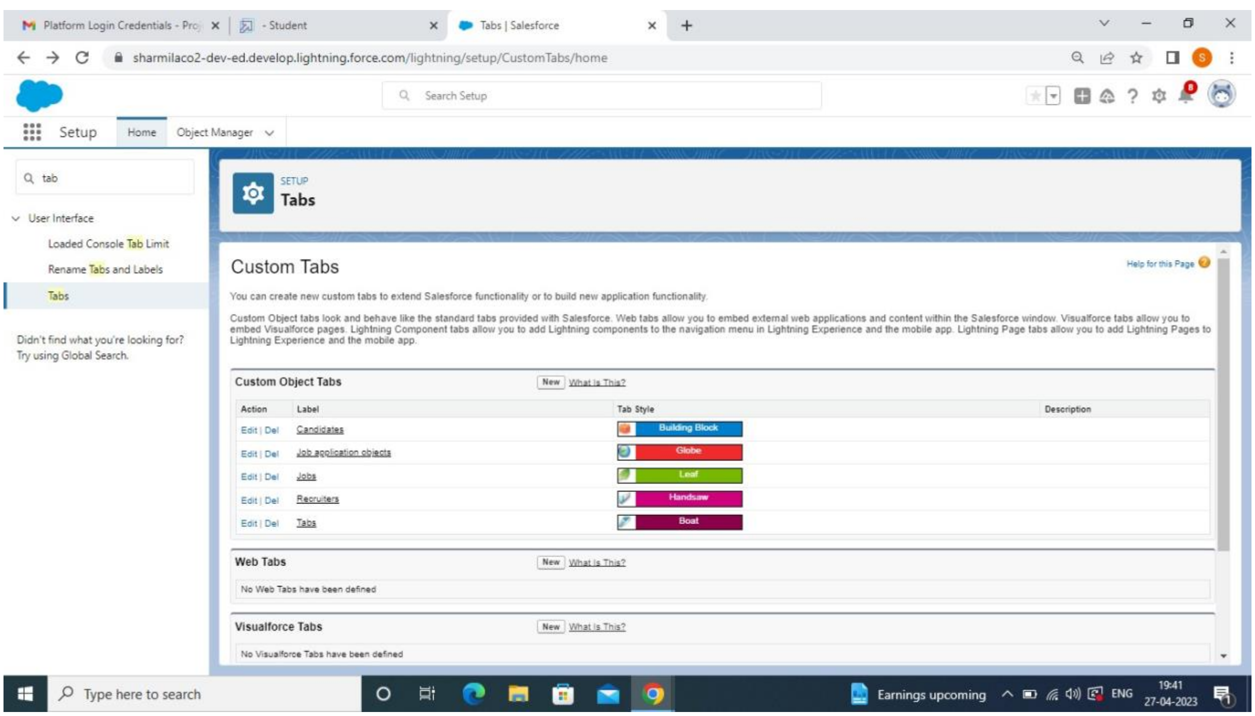
3. **Click New custom object tab section**

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

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

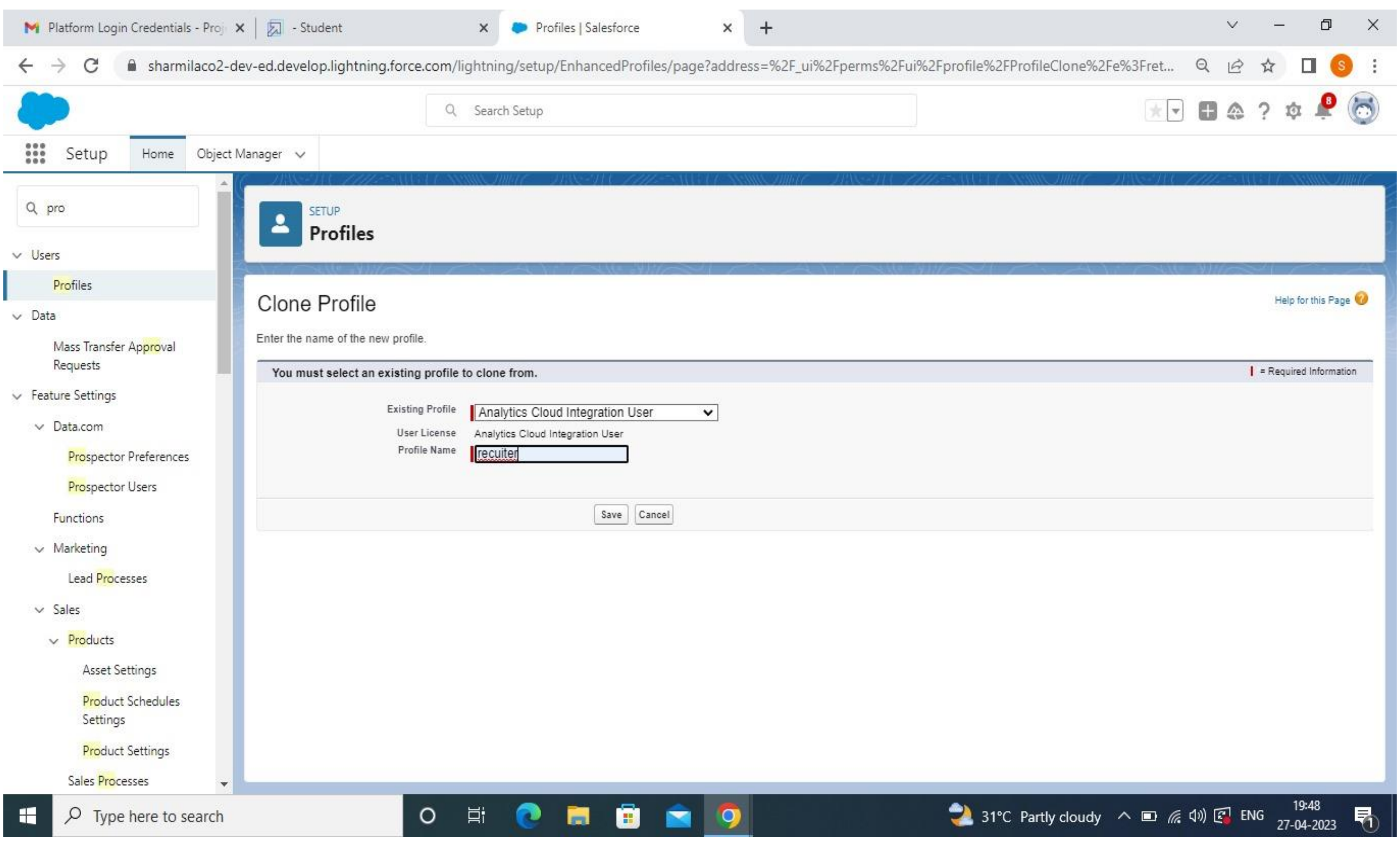
Create a custom profile

1. **From setup , enter profiles in Quick Find box**

2. **Select profiles.**

3. **Click clone.**

4. **For Profile, enter Recruiter.**



5. **Click save.**

Activity -2

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

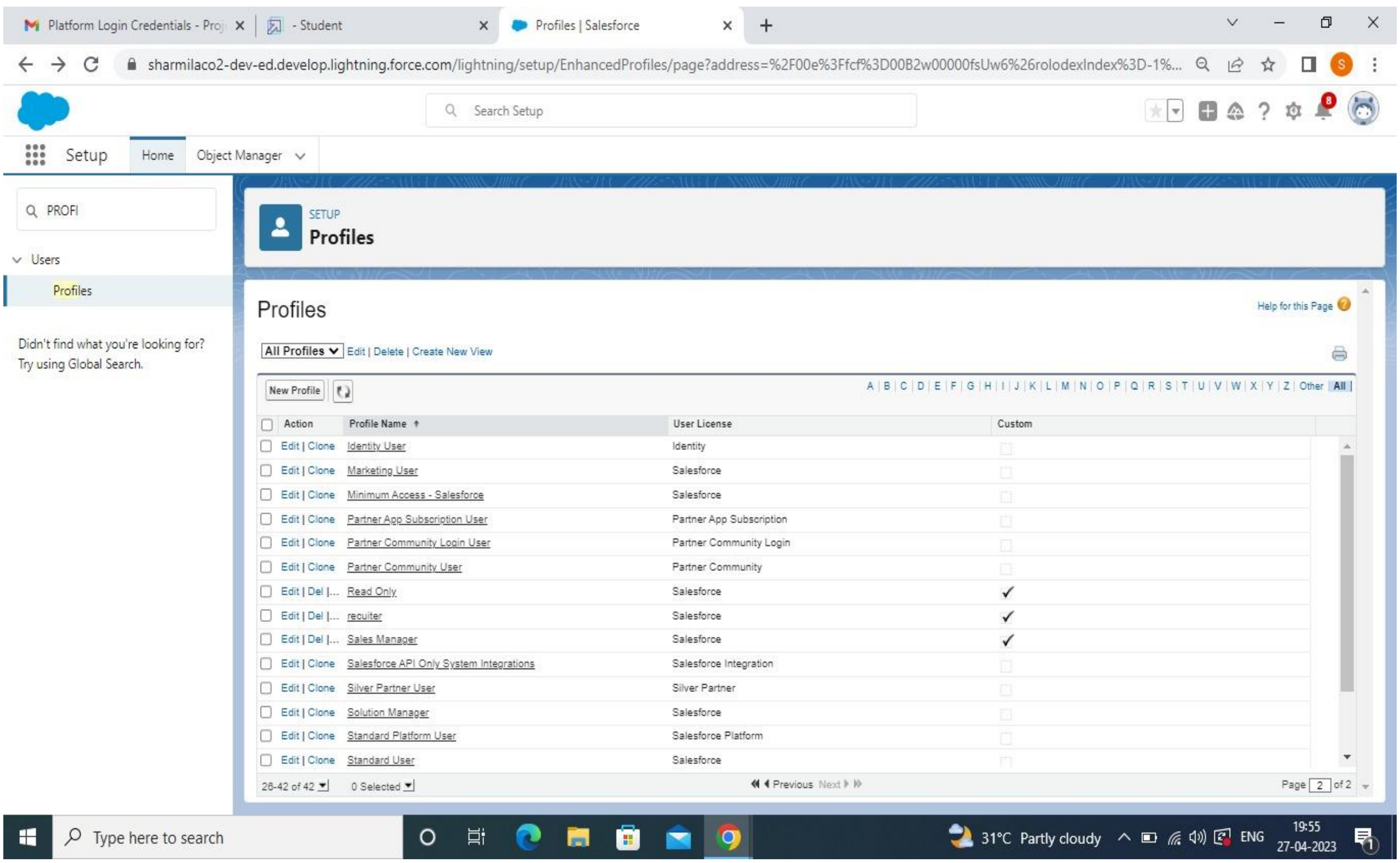
1. **From setup , enter profiles in Quick Find box**

2. **Select profiles.**

3. **Click clone.**

4. **For Profile, enter sales manager.**

5. **Click save.**



Milestone 6-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 aaccess.
Activity-1

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

2. **Click New User.**

3. **Enter First name as HR and last name as Manager.**

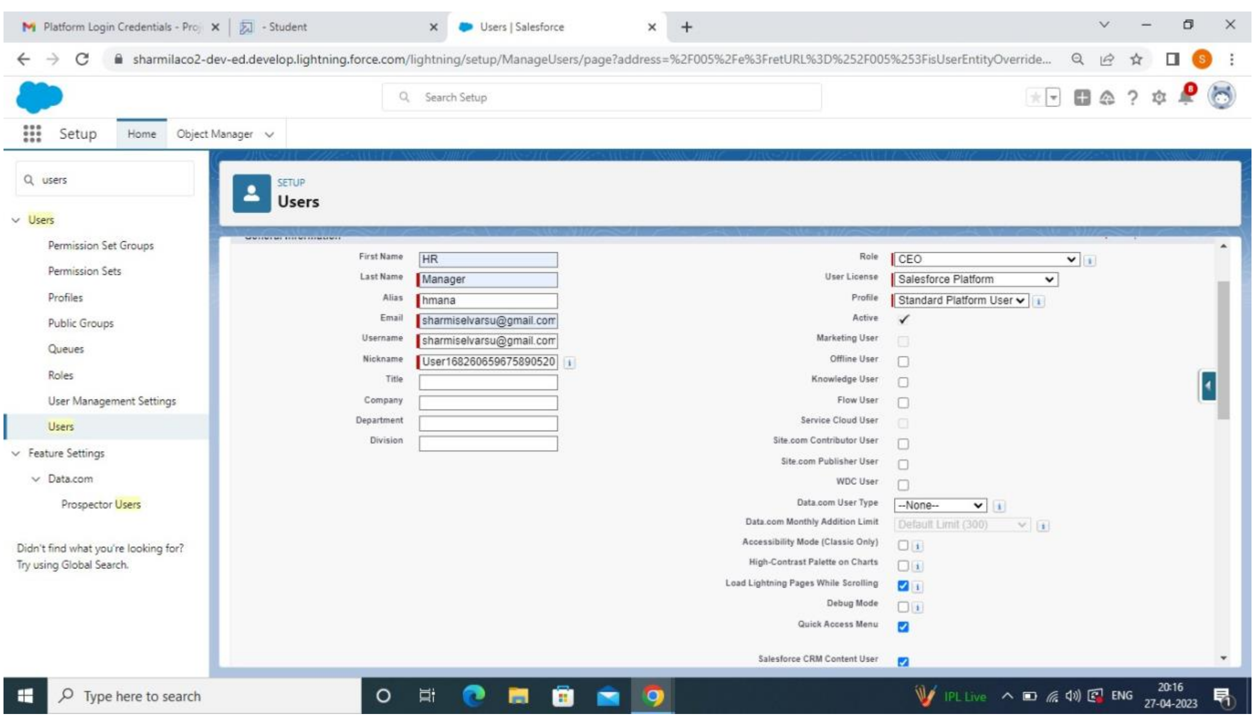
4. **Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.**

5. **Then create a new role HR Manager.**

6. **Select user License as Standard Platform User.**

7. **Select profile.**

8. **Click save.**



Activity -2

Create a User with a username as “Ganesh Gelli “.

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

2. **Click New User.**

3. **Enter First name as Ganesh and last name as Gelli .**

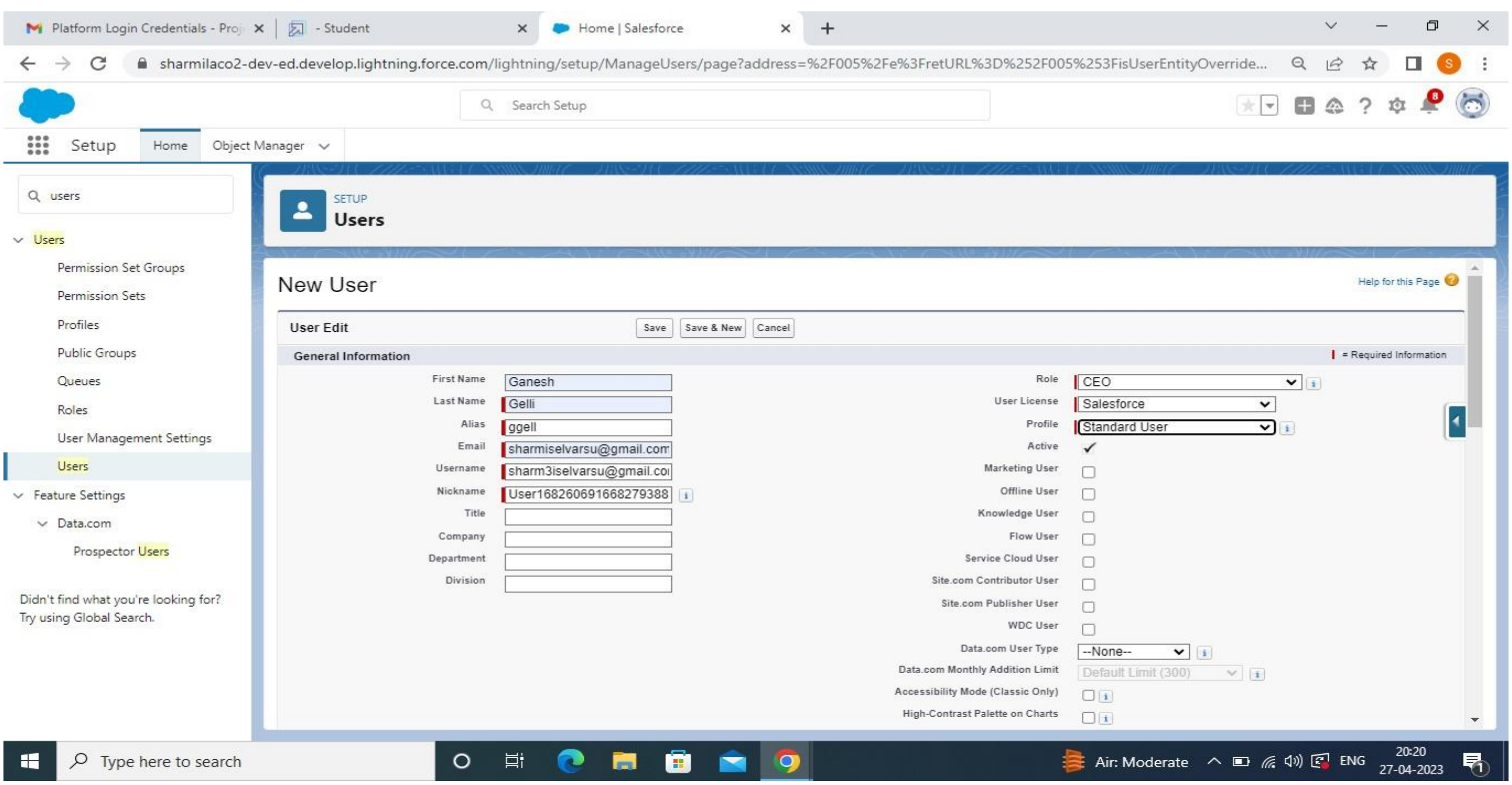
4. **Enter the user’s name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.**

5. **Then create a new role Ganesh Gelli.**

6. **Select user License as Standard Platform User.**

7. **Select profile.**

8. **Click save.**



Milestone 7-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:

1. Owner-based Sharing Rules
2. Criteria-based Sharing Rules
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.**

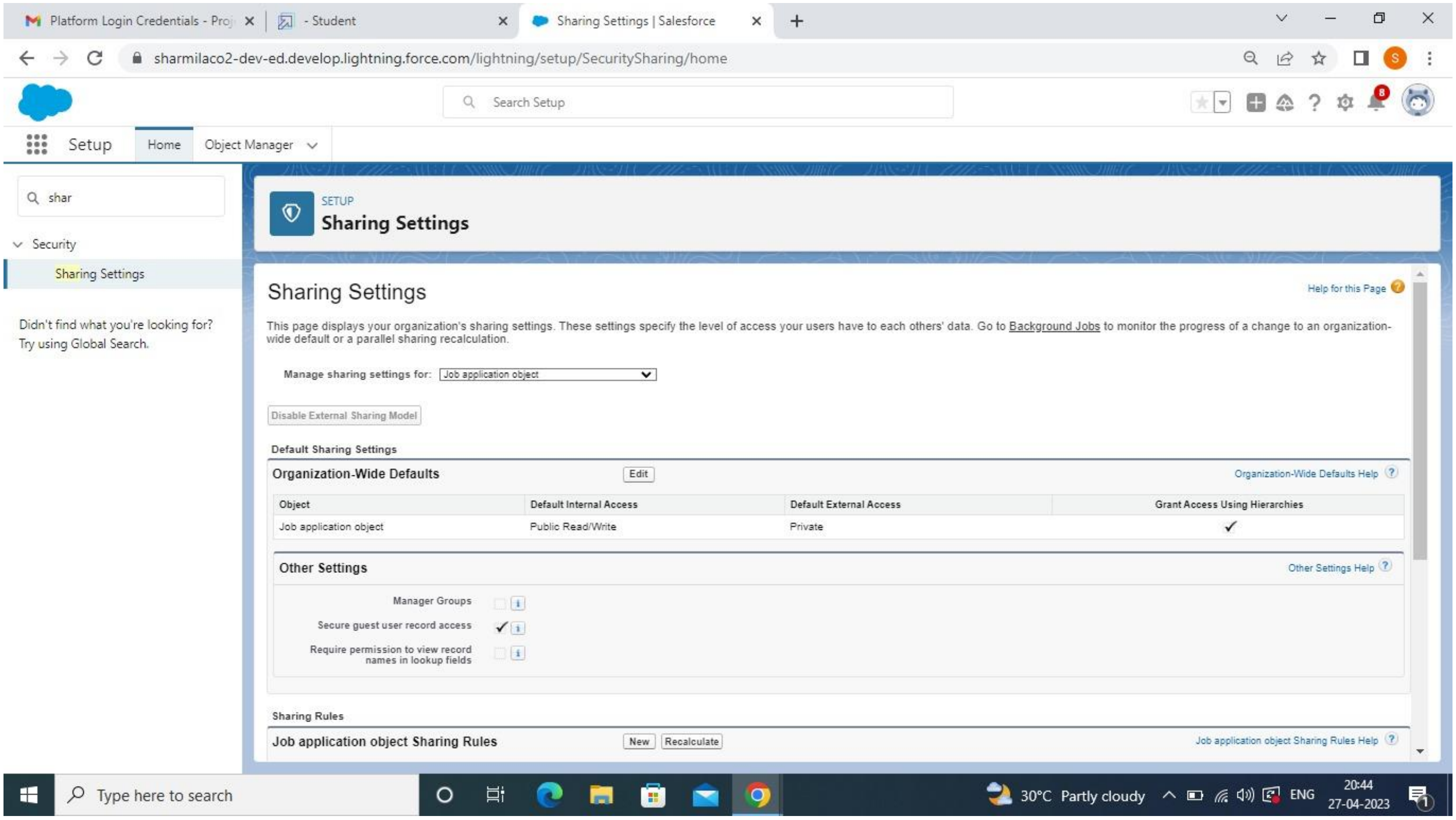
5) **Select the field can join immediately check field from the candidate object.**

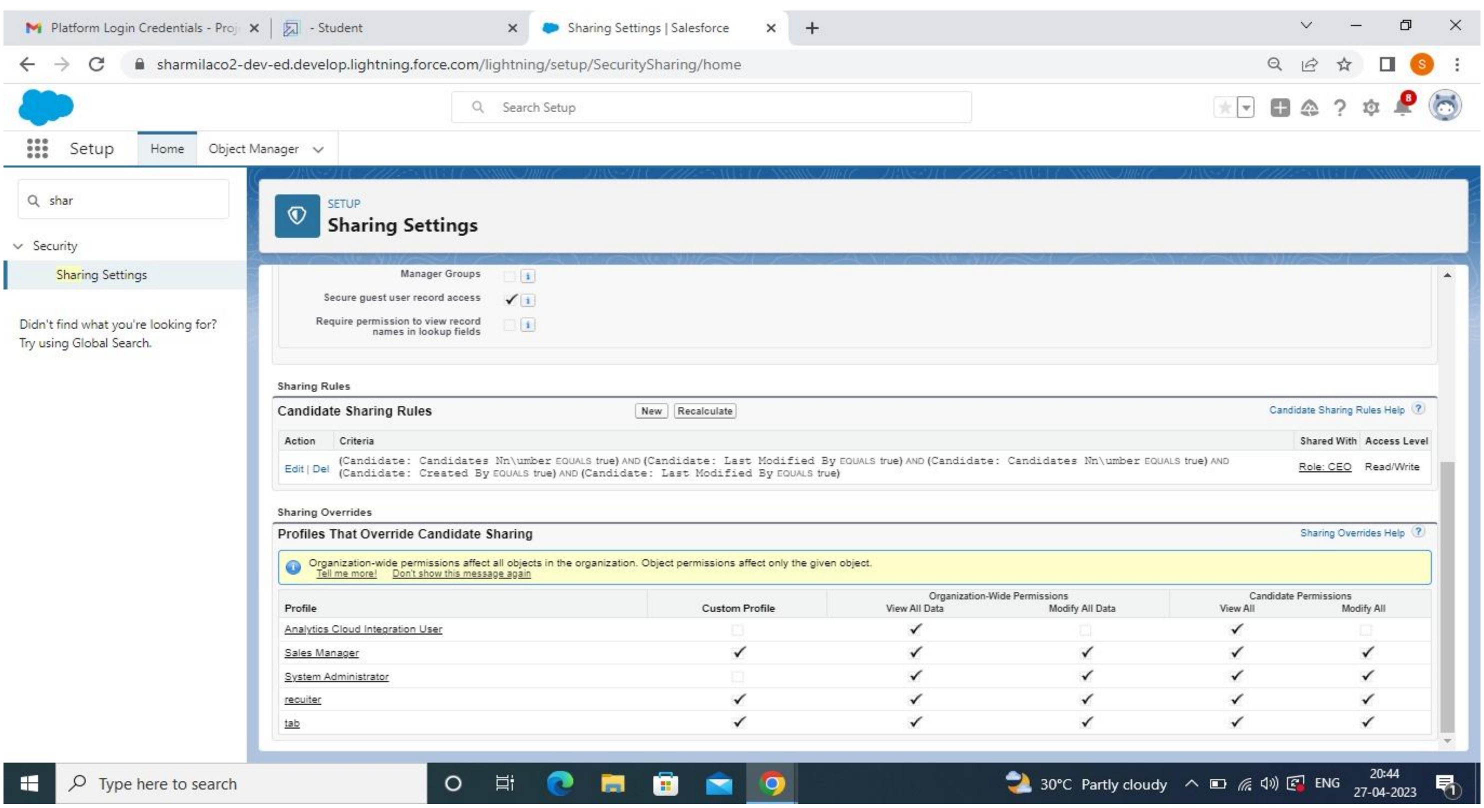
6) **Select the operator as equal and value is true.**

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.**

9) **And save the rule.**





Activity -2

Create a Sharing Rule To Share The Records of job Application To HR manager

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.

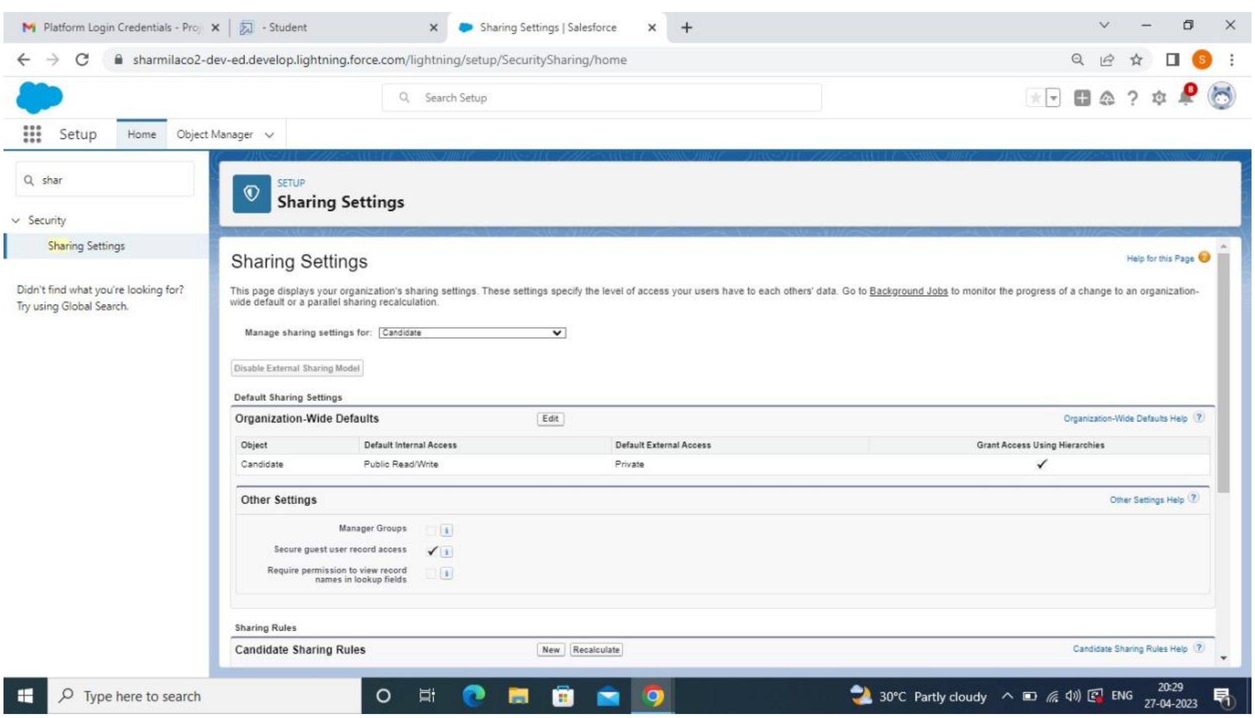
5) Select the field can join immediately check field from the candidate object.

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.

9) And save the rule.



Milestone 8- 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.

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.**

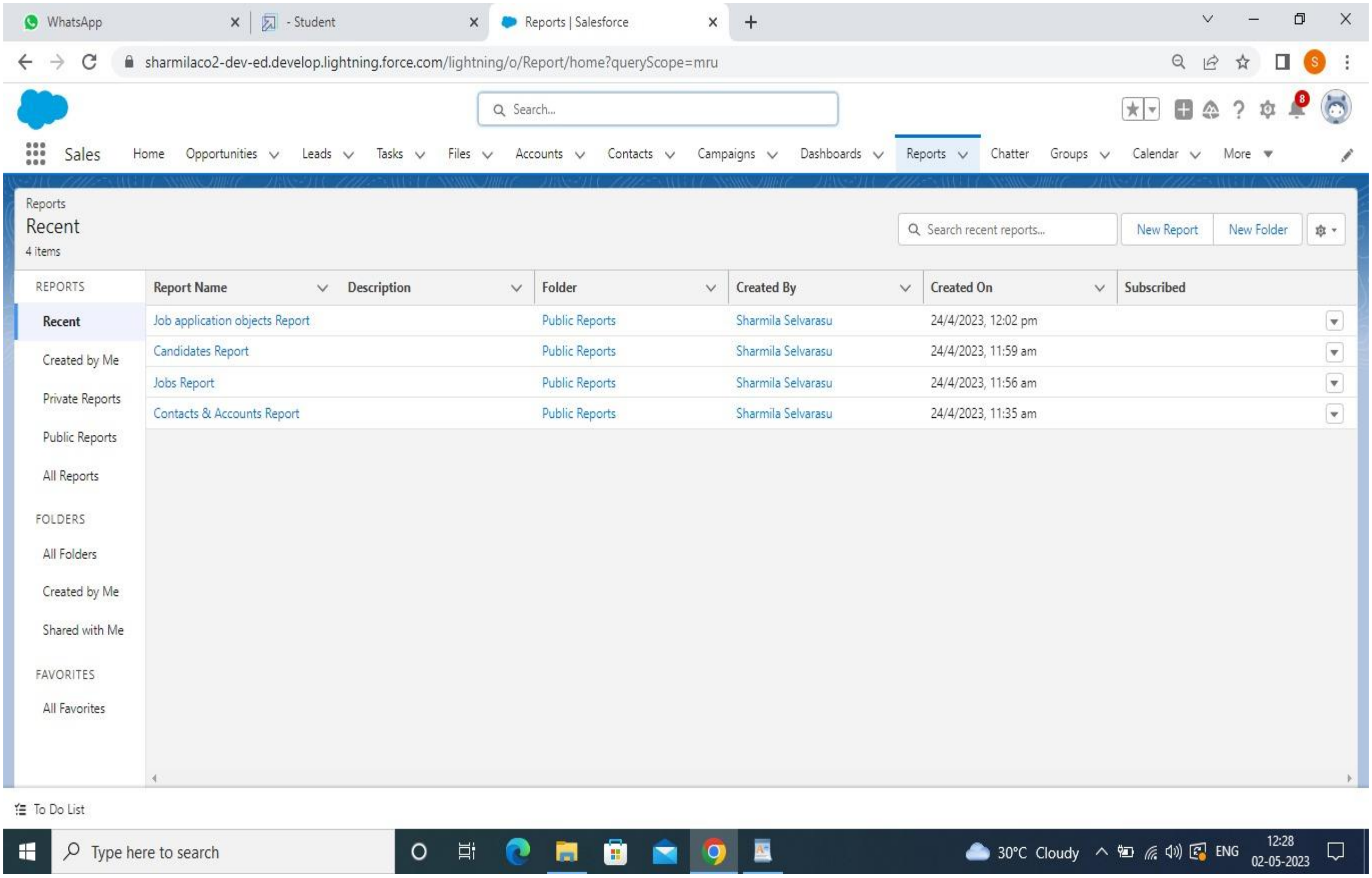
8) **In the columns section add Type and Billing city.**

9) **Save the report by giving label name and save the folder as a public folder and save the report.**

Activity -2

Create a report using the objects jobs , Candidate and job application.

Create a report using the objects jobs, Candidate and job application.
Follow the steps from above Activity.



4.4.Trailhead Profile Public URL

Team Lead - https://trailblazer.me/id/sselvarasu2
Team member 1-https://trailblazer.me/id/navel3012
Team member 2-https://trailblazer.me/id/kalaa19
Team member 3-https://trailblazer.me/id/craja75

5.Advantages and Disadvantages

Advantages

- **Reduces time spent on admin tasks.**
- **Resume and CV screening.**
- **Speeds up the recruitment cycle.**
- **Improves the quality of hire.**
- **Enhances reporting and compliance.**

Disadvantages

- **Could filter out good candidates.**
- **Communications can be less personalized.**
- **Configuration and Setup is complex and time -consuming.**
- **Expensive**

6.Applications

- **Sales force Adoption Dashboards**
- **User Access and Permissions Assistant**
- **Query Studio for Marketing Cloud**
- **LinkedIn Sales Navigator for Sales force**
- **Project Management Tool – PMT**
- **Agile Accelerator.**

7.Conclusion

The recruitment process is Streamlined and made simpler through application tracking system.

Which aid recruiters.it facilitates in the employment of qualified individuals by collecting and

Screening thousands of resumes for job applications.

8.Future Scope

- **Demand for Sales force developers will skyrocket in 2023, and the manufacturing and banking sectors are the two that are growing fastest.**
- **That being said, a Sales force developer's job is extremely broad. These individuals can deal with a variety of tasks.**

- **For example: Venture applications, online stores , and CRMs.**