

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.*

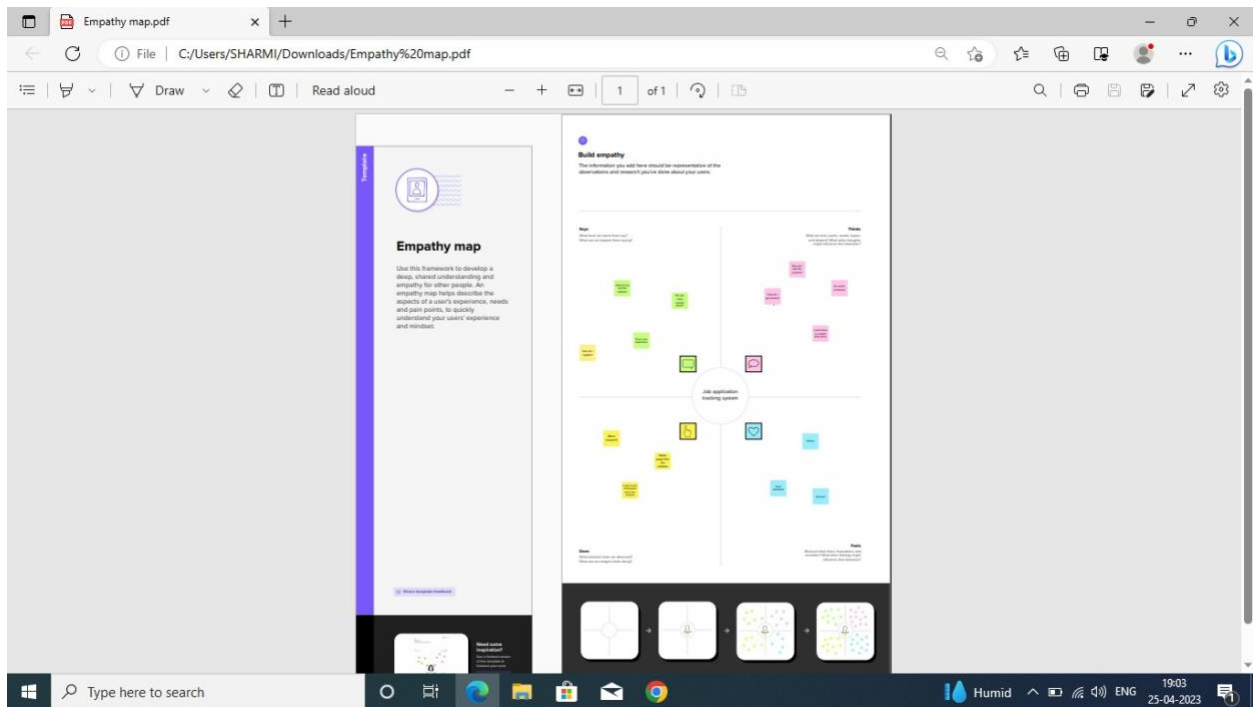
1.2 Purpose

- 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.

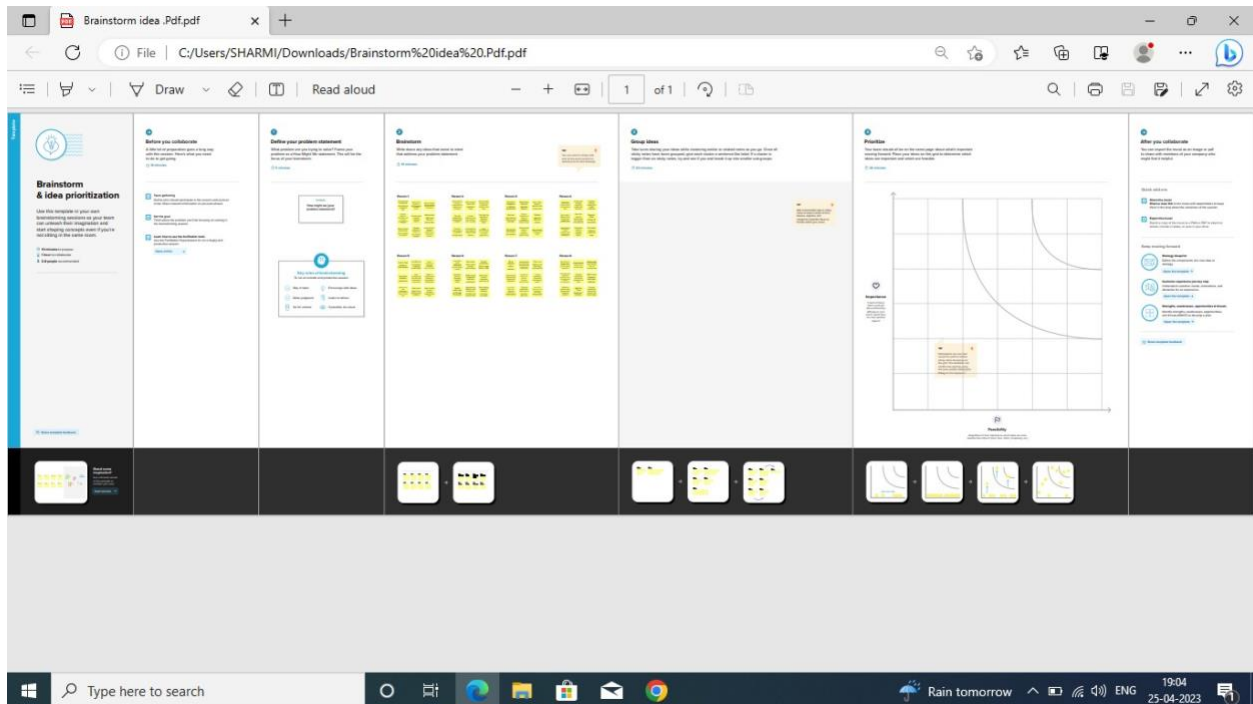
2.Problem Definition and Design Thinking

- *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	Fields in the Object	
Object 1 Recruiter	Field Label	Data Type
	created by	Lookup
	Last modified by	Lookup
	Owner	Date/Time
	Recruiter Number	Auto number
Object 2 Candidates	Field Label	Data Type
	Candidate	Text
Object 3 Job	Field Label	Data Type
	jobs number	Auto number
	Created by	Lookup
	Last modified by	Lookup

Object 4 Job application Object	Field Label	Data Type
	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.



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 receive 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.*



Username

sharmisf@gmail.com

Password

.....|

Log In

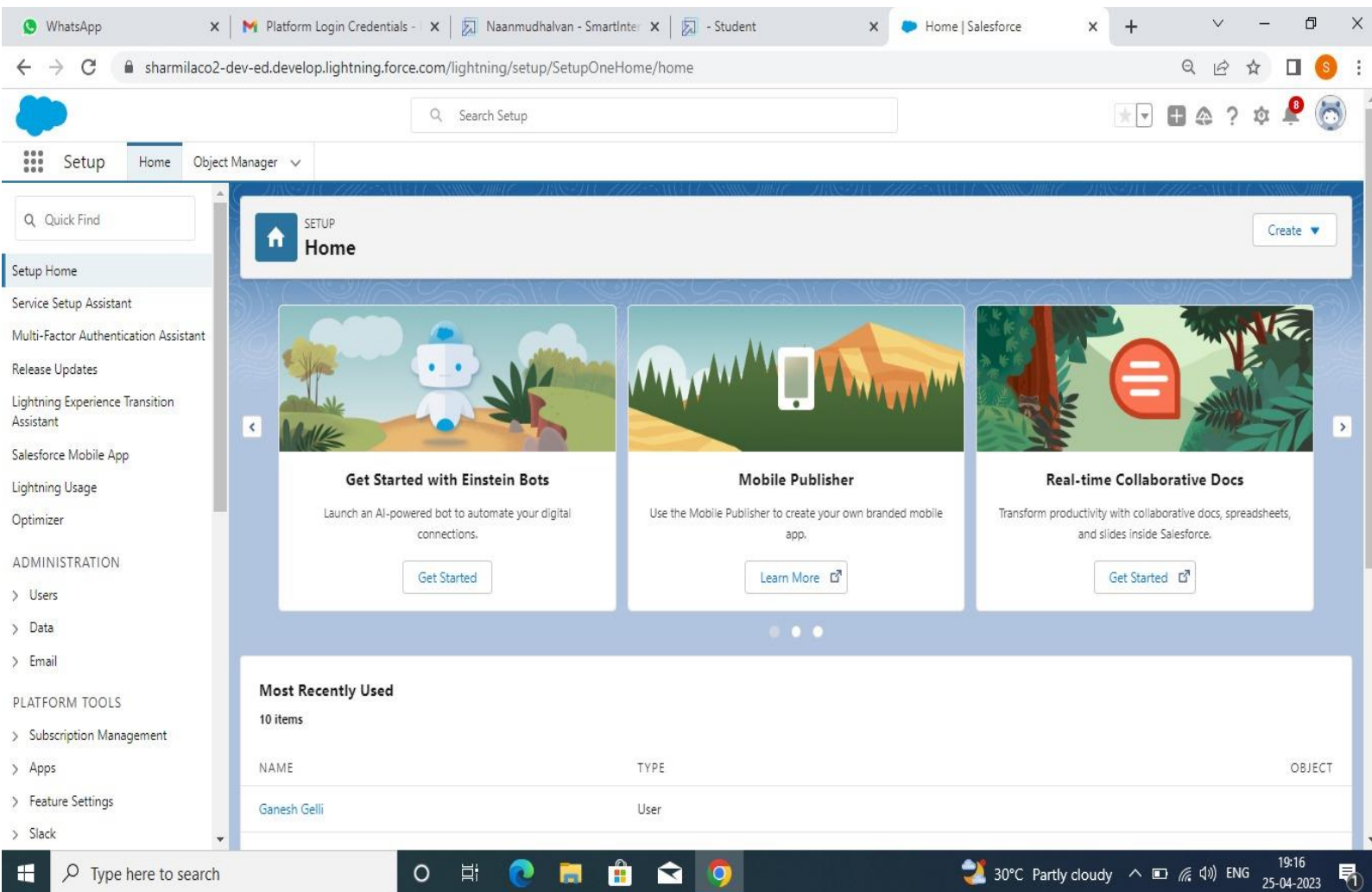
☐ Remember me

[Forgot Your Password?](#)

[Use Custom Domain](#)

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- The setup page will appear as below.



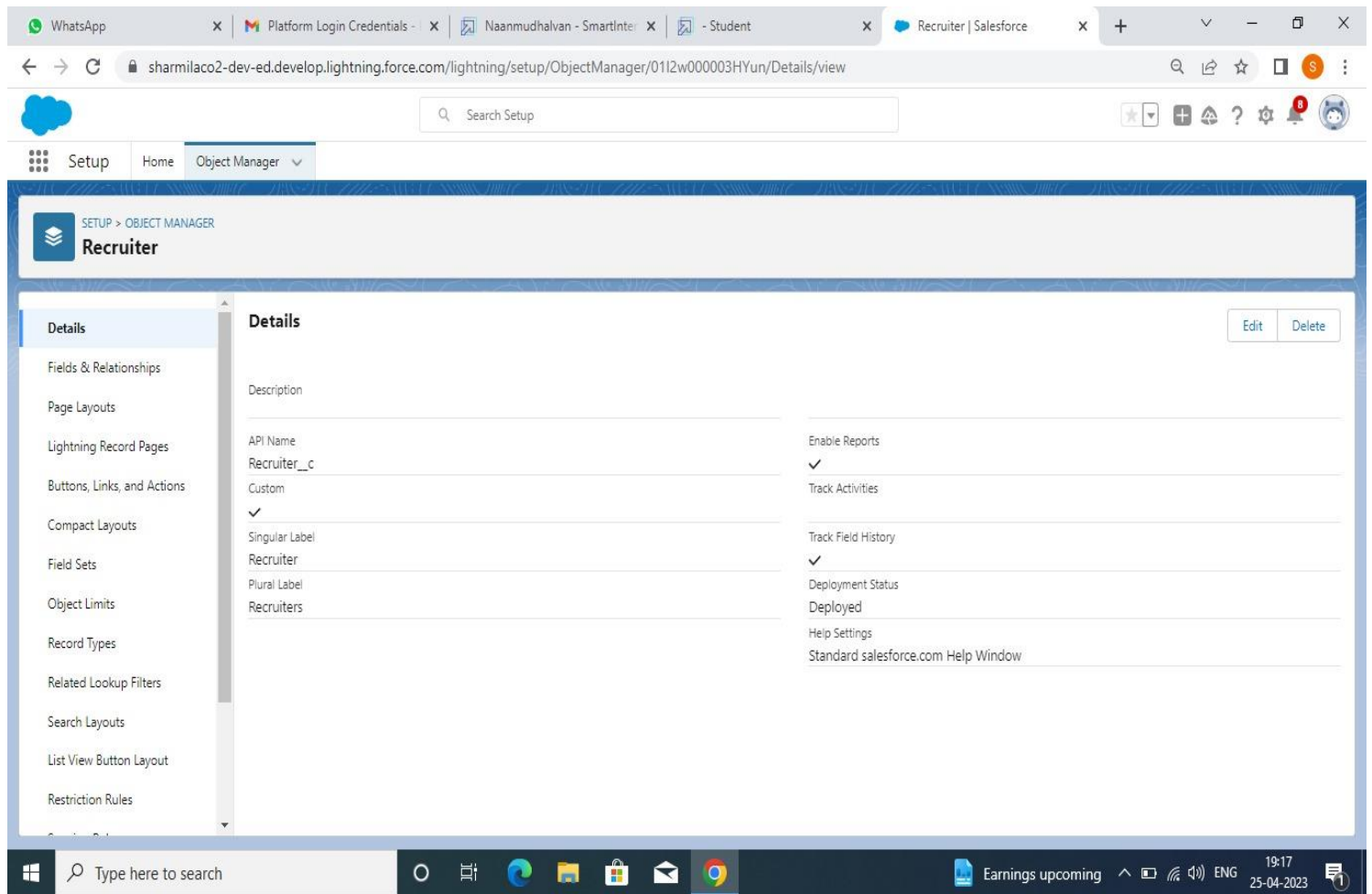
Milestone 2-Object

- *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).*
-
- ***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.

The screenshot shows the Salesforce Setup interface for the 'Job' object. The browser tabs include 'WhatsApp', 'Platform Login Credentials', 'Naanmudhalvan - SmartInte...', '- Student', and 'Job | Salesforce'. The address bar shows the URL: 'sharmilaco2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HaT8/Details/view'. The 'Setup' menu is open, showing 'Object Manager' selected. The 'Details' section on the left lists various configuration areas: Fields & Relationships, 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 'Details' section on the right shows the following configuration:

Field	Value
Description	
API Name	CREAT_A_JOBS__c
Custom	✓
Singular Label	Job
Plural Label	Jobs
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The bottom of the screen shows the Windows taskbar with the search bar, task view button, and several application icons. The system tray displays the temperature as 30°C, weather as 'Partly cloudy', and the time as 19:19 on 25-04-2023.

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.

The screenshot shows the Salesforce Setup interface. The browser tabs include WhatsApp, Platform Login Credentials, Naanmudhalvan - SmartInte, - Student, and Candidate | Salesforce. The address bar shows the URL: sharmilaco2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003HaTc/Details/view. The Salesforce logo and a search bar are at the top. The navigation menu on the left includes Setup, Home, and Object Manager. The main content area is titled 'Candidate' and shows the 'Details' tab. The left sidebar lists various configuration options: Details, Fields & Relationships, 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 'Details' section includes fields for Description, API Name (CREATE_CANDIDATES__c), Custom (checked), Singular Label (Candidate), Plural Label (Candidates), Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner of the details section. The Windows taskbar at the bottom shows the Start button, search bar, and several application icons. The system tray on the right shows the date and time: 19:17, 25-04-2023.

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.

The screenshot shows the Salesforce Setup interface for the 'Job application object'. The browser tabs include WhatsApp, Platform Login Credentials, Naanmudhalvan - SmartInte, - Student, and Job application object | Sale. The URL is sharmilaco2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HaTw/Details/view. The page title is 'Job application object' under 'SETUP > OBJECT MANAGER'. The left sidebar lists various configuration options: Details, Fields & Relationships, 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 shows the 'Details' section with the following fields:

Field	Value
Description	
API Name	Job_application_object_c
Custom	✓
Singular Label	Job application object
Plural Label	Job application objects
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The bottom of the screen shows the Windows taskbar with the search bar, task view button, and several application icons. The system tray displays the temperature as 30°C, weather as Partly cloudy, and the date and time as 19:19 on 25-04-2023.

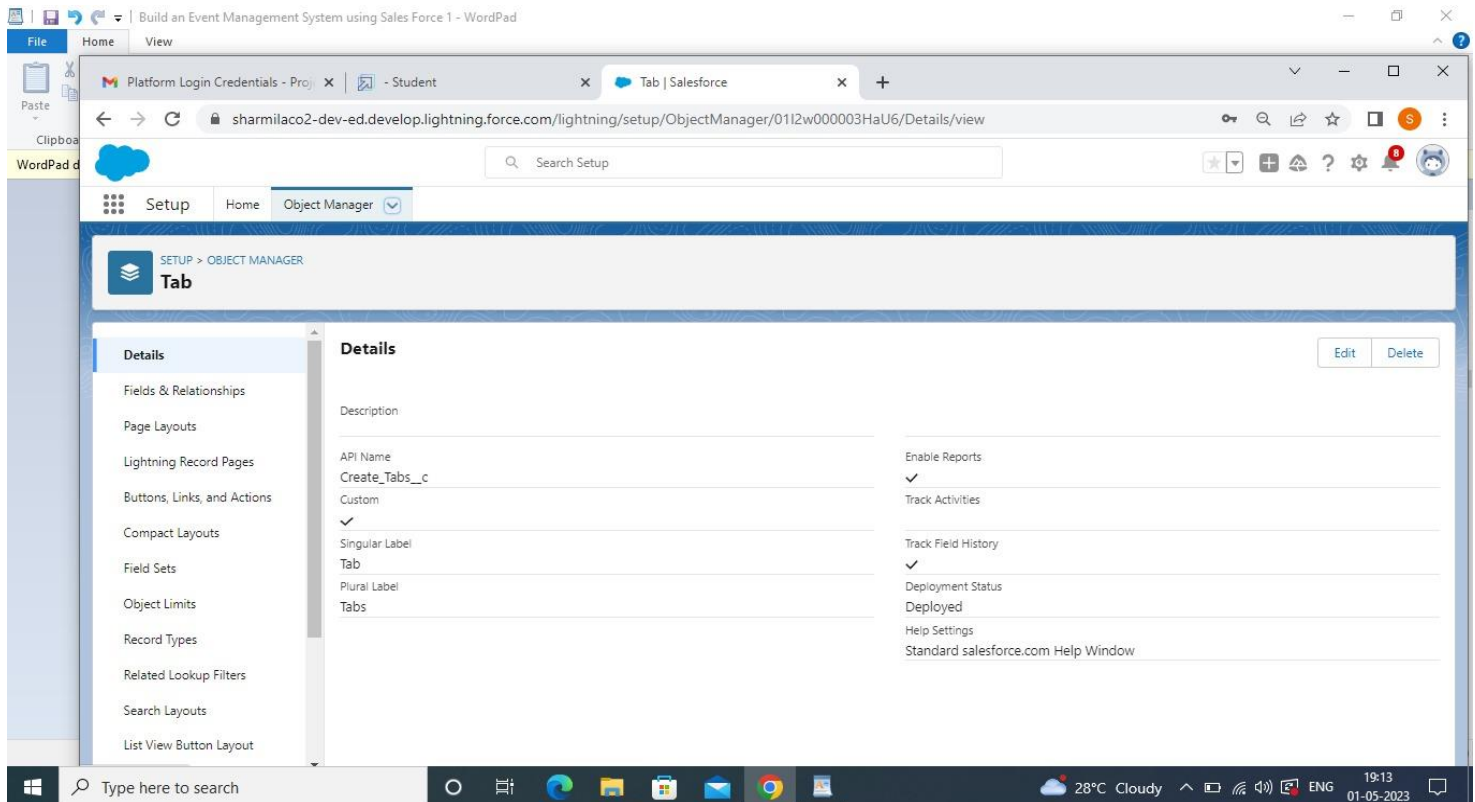
Activity-5

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.**

The screenshot shows the Salesforce Setup interface. The browser address bar indicates the URL: `sharmilaco2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HaU6/FieldsAndRelationships/new`. The page title is "New Custom Field". The sidebar on the left lists various setup options, with "Fields & Relationships" selected. The main content area shows "Step 3. Establish field-level security". Below this, there is a table for "Field-Level Security for Profile" with columns for "Visible" and "Read-Only".

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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.

Platform Login Credentials - Proj | - Student | Job | Salesforce

sharmilaco2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HaT8/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Job

Details

Fields & Relationships

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

Restriction Rules

Job

New Relationship

Step 5. Add reference field to Page Layouts

Step 5 of 6

Previous Next Cancel

Field Label	Job application object
Data Type	Master-Detail
Field Name	Job_application_object
Description	

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Job Layout

Previous Next Cancel

Type here to search

30°C Partly cloudy 19:22 27-04-2023

Activity-3

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

2. On the sidebar, click Fields & Relationships.

Platform Login Credentials - Proj | - Student | Tab | Salesforce

sharmilaco2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HaU6/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Tab

Details

Fields & Relationships

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

Restriction Rules

Date

Date/Time

Email

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted)

Time

URL

Allows users to enter a date and time, or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", and "14:40:00" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Type here to search

30°C Partly cloudy 19:26 27-04-2023

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.

The screenshot shows the Salesforce Setup interface. The browser address bar displays the URL: `sharmilaco2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HaTc/FieldsAndRelationships/new`. The page title is "Candidate" under the "SETUP > OBJECT MANAGER" breadcrumb. The left sidebar contains a list of navigation items: 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 shows a list of data types for the new field, with "Text" selected. The list includes: Currency, Date, Date/Time, Email, Geolocation, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text (selected), Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL. Each data type has a brief description of its functionality.

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.

The screenshot shows the Salesforce Setup interface for Custom Tabs. The browser address bar indicates the URL: `sharmilaco2-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home`. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Custom Tabs' and includes a search bar with 'tab' entered. Below the search bar, the 'User Interface' section is expanded, showing 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs'. The 'Custom Object Tabs' section is active, displaying a table with columns for Action, Label, Tab Style, and Description. The table lists several tabs: 'Candidates', 'Job application objects', 'Jobs', 'Recruiters', and 'Tabs'. Each tab has a corresponding icon and a color-coded label. The 'Web Tabs' and 'Visualforce Tabs' sections are also visible, both showing 'No Web Tabs have been defined' and 'No Visualforce Tabs have been defined' respectively. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

Action	Label	Tab Style	Description
Edit Del	Candidates	Building Block	
Edit Del	Job application objects	Glacier	
Edit Del	Jobs	Leaf	
Edit Del	Recruiters	Handcuff	
Edit Del	Tabs	Boat	

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.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'pro' entered and a list of categories: Users, Profiles (selected), Data, Feature Settings, Data.com, Marketing, Sales, and Products. The main content area is titled 'SETUP Profiles' and displays the 'Clone Profile' dialog box. The dialog box has a header 'Clone Profile' and a sub-header 'Enter the name of the new profile.' Below this, a message states 'You must select an existing profile to clone from.' The dialog box contains a table with the following information:

Existing Profile	User License	Profile Name
Analytics Cloud Integration User	Analytics Cloud Integration User	recruiter

At the bottom of the dialog box, there are 'Save' and 'Cancel' buttons. The bottom of the screen shows a Windows taskbar with the date and time '19:48 27-04-2023' and the system status '31°C Partly cloudy'.

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.

The screenshot displays the Salesforce Setup interface for managing profiles. The 'Profiles' section is active, showing a list of existing profiles. The 'Sales Manager' profile is selected, and the 'Custom' checkbox is checked. The page includes a search bar, navigation tabs (Setup, Home, Object Manager), and a sidebar with 'Users' and 'Profiles' sections.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Identity User	Identity	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Partner Community Login User	Partner Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Partner Community User	Partner Community	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Read Only	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	requirer	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Sales Manager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>

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 access.

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.

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains a search bar with 'users' entered and a list of navigation items including Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, and Data.com. The main content area is titled 'Users' and contains a form for creating a new user. The form fields are as follows:

Field	Value
First Name	HR
Last Name	Manager
Alias	hmana
Email	sharmiselvarsu@gmail.com
Username	sharmiselvarsu@gmail.com
Nickname	User168260659675890520
Title	
Company	
Department	
Division	
Role	CEO
User License	Salesforce Platform
Profile	Standard Platform User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	None
Data.com Monthly Addition Limit	Default Limit (300)
Accessibility Mode (Classic Only)	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>
Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Debug Mode	<input type="checkbox"/>
Quick Access Menu	<input checked="" type="checkbox"/>
Salesforce CRM Content User	<input checked="" type="checkbox"/>

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.

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Users' selected. The main content area is titled 'New User' and contains a 'User Edit' form. The form is divided into two columns. The left column, 'General Information', includes fields for First Name (Ganesh), Last Name (Gelli), Alias (ggelli), Email (sharmiselvarsu@gmail.com), Username (sharmiselvarsu@gmail.com), Nickname (User168260691668279388), Title, Company, Department, and Division. The right column includes fields for Role (CEO), User License (Salesforce), Profile (Standard User), Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (--None--), Data.com Monthly Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only), and High-Contrast Palette on Charts. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

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.**

Platform Login Credentials - Proj x - Student x Sharing Settings | Salesforce x +

sharmilaco2-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

Search Setup

Setup Home Object Manager

shar

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: Job application object

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults [Edit](#) [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Job application object	Public Read/Write	Private	<input checked="" type="checkbox"/>

Other Settings

[Other Settings Help](#)

Manager Groups ☐ [Help](#)

Secure guest user record access ☒ [Help](#)

Require permission to view record names in lookup fields ☐ [Help](#)

Sharing Rules

Job application object Sharing Rules [New](#) [Recalculate](#) [Job application object Sharing Rules Help](#)

Platform Login Credentials - Proj x - Student x Sharing Settings | Salesforce x +

sharmilaco2-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

Search Setup

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shar

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Sharing Settings

Manager Groups ☐ [Help](#)

Secure guest user record access ☒ [Help](#)

Require permission to view record names in lookup fields ☐ [Help](#)

Sharing Rules

[New](#) [Recalculate](#) [Candidate Sharing Rules Help](#)

Action	Criteria	Shared With	Access Level
Edit Del	(Candidate: Candidates Number EQUALS true) AND (Candidate: Last Modified By EQUALS true) AND (Candidate: Candidates Number EQUALS true) AND (Candidate: Created By EQUALS true) AND (Candidate: Last Modified By EQUALS true)	Role: CEO	Read/Write

Sharing Overrides

[Sharing Overrides Help](#)

Organization-wide permissions affect all objects in the organization. Object permissions affect only the given object.

[Tell me more!](#) [Don't show this message again](#)

Profile	Custom Profile	Organization-Wide Permissions	Candidate Permissions
		View All Data	View All
Analytics Cloud Integration User	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Administrator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
recruiter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
tab	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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.

The screenshot shows the Salesforce 'Sharing Settings' page for the 'Candidate' object. The page is titled 'Sharing Settings' and includes a search bar at the top. The left sidebar shows the 'Setup' menu with 'Security' > 'Sharing Settings' selected. The main content area displays the following settings:

- Manage sharing settings for:** Candidate
- Default Sharing Settings:**
 - Organization-Wide Defaults:** A table showing 'Candidate' object with 'Public Read/Write' internal access, 'Private' external access, and 'Grant Access Using Hierarchies' checked.
 - Other Settings:** Includes checkboxes for 'Manager Groups' (unchecked), 'Secure guest user record access' (checked), and 'Require permission to view record names in lookup fields' (unchecked).
- Sharing Rules:** A section for 'Candidate Sharing Rules' with 'New' and 'Recalculate' buttons.

The bottom of the screen shows the Windows taskbar with the search bar and system tray.

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.**

WhatsApp x Student x Reports | Salesforce x +

sharmilaco2-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

Reports

Recent 4 Items

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Job application objects Report		Public Reports	Sharmila Selvarasu	24/4/2023, 12:02 pm	
Created by Me	Candidates Report		Public Reports	Sharmila Selvarasu	24/4/2023, 11:59 am	
Private Reports	Jobs Report		Public Reports	Sharmila Selvarasu	24/4/2023, 11:56 am	
Public Reports	Contacts & Accounts Report		Public Reports	Sharmila Selvarasu	24/4/2023, 11:35 am	
All Reports						

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

To Do List

Type here to search

30°C Cloudy 12:28 02-05-2023

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.