

Job Application Tracking System

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.

Salesforce

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce 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.

Creating Developer Account

Creating a developer org in salesforce.

1.Go to [developers.salesforce.com/](https://developer.salesforce.com/)

2.Click on sign up.

3.On the sign up form, enter the following details :

a.First name & Last name

b.Email

c.Role : Developer

d.Company : College Name

e.County : India

f.Postal Code : pin code

g.Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :

username@organization.com

Object

What is an 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. They are the heart of any application and provide a structure for sharing data.

1.In This Application We Use 4 Custom Objects:

- 2.Recruiter
- 3.Jobs
- 4.Candidate
- 5.Job-Application

Create A Custom Object For Recruiter

Create a custom object for Recruiter:

To create a custom object, follow these steps:

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 Name"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

The screenshot shows the Salesforce Object Manager page for the 'Recruiter' object. The left sidebar lists various setup categories: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main 'Details' section shows the API Name as 'Recruiter__c'. Under the 'Custom' section, Singular Label is set to 'Recruiter' and Plural Label is set to 'Recruiters'. On the right, there are checkboxes for Enable Reports (checked), Track Activities, Track Field History (checked), Deployment Status (set to 'Deployed'), and Help Settings (set to 'Standard salesforce.com Help Window'). At the bottom right are 'Edit' and 'Delete' buttons.

The screenshot shows the 'New Custom Object' configuration page. It includes sections for Optional Features (Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, Enable Licensing), Object Classification (Allow Sharing, Allow Bulk API Access, Allow Streaming API Access), Deployment Status (In Development, Deployed), and Search Status (Allow Search). Under Object Creation Options, 'Add Notes and Attachments related list to default page layout' is checked. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

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

Creation Of Jobs Object

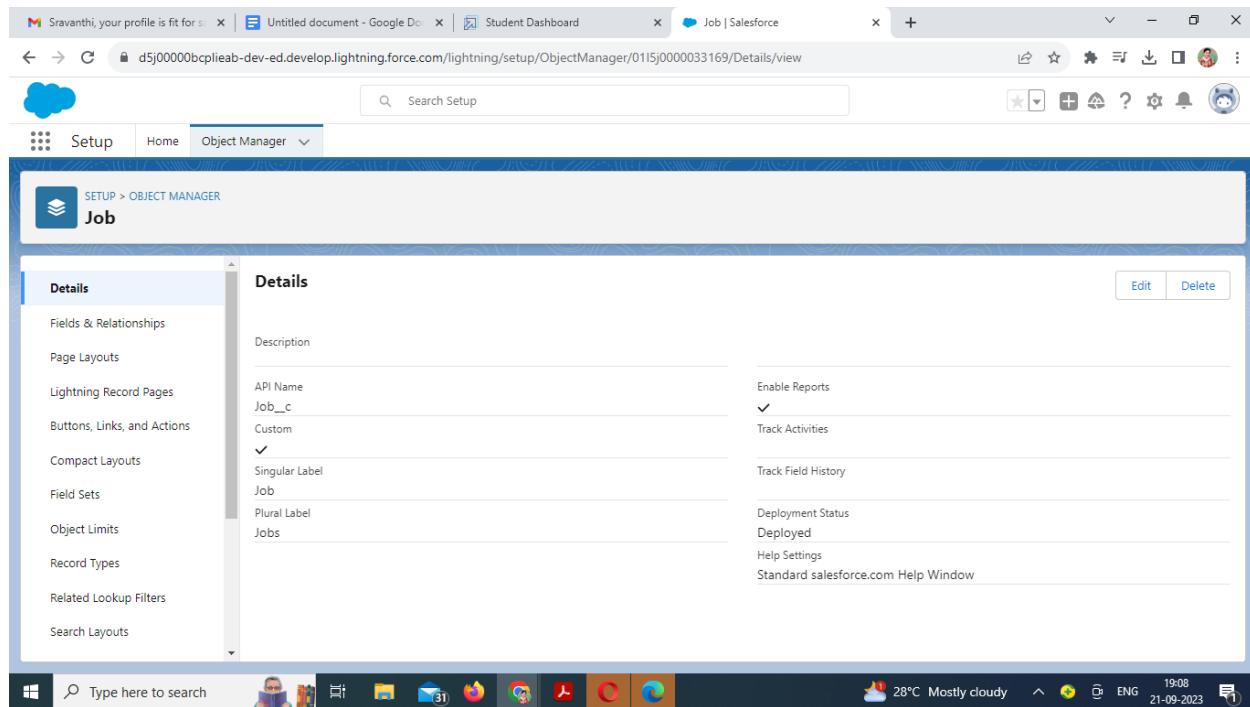
Click on the gear icon and then select Setup.

1. Click on the object manager tab just beside the home tab.

2. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

3. On the Custom Object Definition page, create the object as follows:

- Label: Job
- Plural Label: Jobs
- Record Name: Job Name
- Select the data type as "Text".
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- In the Object Creation Options section, select Add Notes and Attachments related list to default page layout
- Click Save.



Creation Of Candidate Object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
 - On the Custom Object Definition page, create the object as follows:
 - Label: Candidate
 - Plural Label: Candidates

- Record Name: Candidates Name
- Select the data type as "Text".
- Check the Allow Reports checkbox.
- Check the Allow Search checkbox.
- In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
- Click Save.

The screenshot shows the Salesforce Setup interface for the Candidate object. The left sidebar has tabs for Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area is titled 'Details' and shows the following configuration:

- Description:** Candidate
- API Name:** Candidate__c
- Singular Label:** Candidate
- Plural Label:** Candidates
- Enable Reports:** ✓
- Track Activities:**
- Track Field History:**
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

Creation Of Job Application Object

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
 - a. On the Custom Object Definition page, create the object as follows:
 - b. Label: Job Application
 - c. Plural Label: Job Applications
 - d. Record Name: Job Application Number
 - e. Select the data type as "Auto Number".
 - f. Under display format enter "JP-{0000}"
 - g. Enter starting number as 1
 - h. Check the Allow Reports checkbox.

- i. Check the Allow Search checkbox.
- j. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
- k. Click Save.

The screenshot shows the Salesforce Setup interface for the 'Job Application' object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main 'Details' tab is selected, displaying the following configuration details:

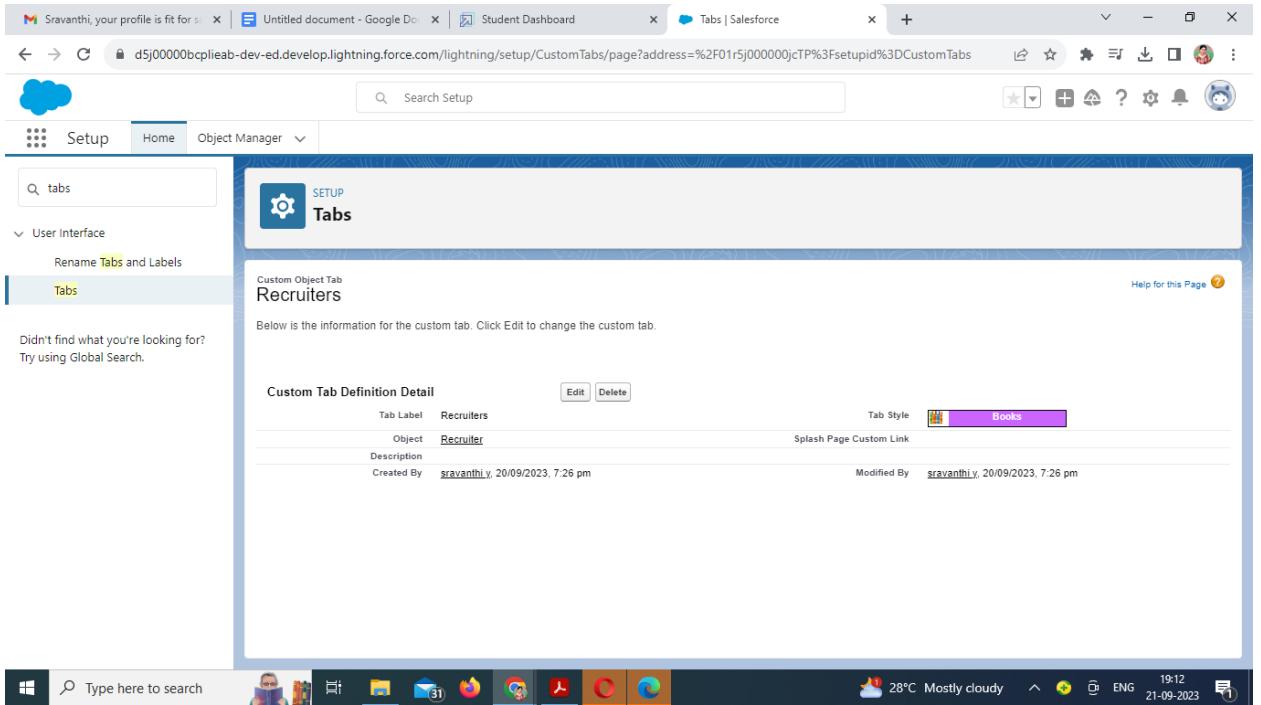
Setting	Value
Description	
API Name	Job_Application__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Job Application
Plural Label	Job Applications
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom of the screen, the Windows taskbar is visible with icons for File Explorer, Mail, and other applications. The system tray shows the date and time as 21-09-2023 at 19:10.

Creation Of Recruiter Tab

Now create a custom tab.

Click on Home tab, enter Tabs in Quick Find and select Tabs

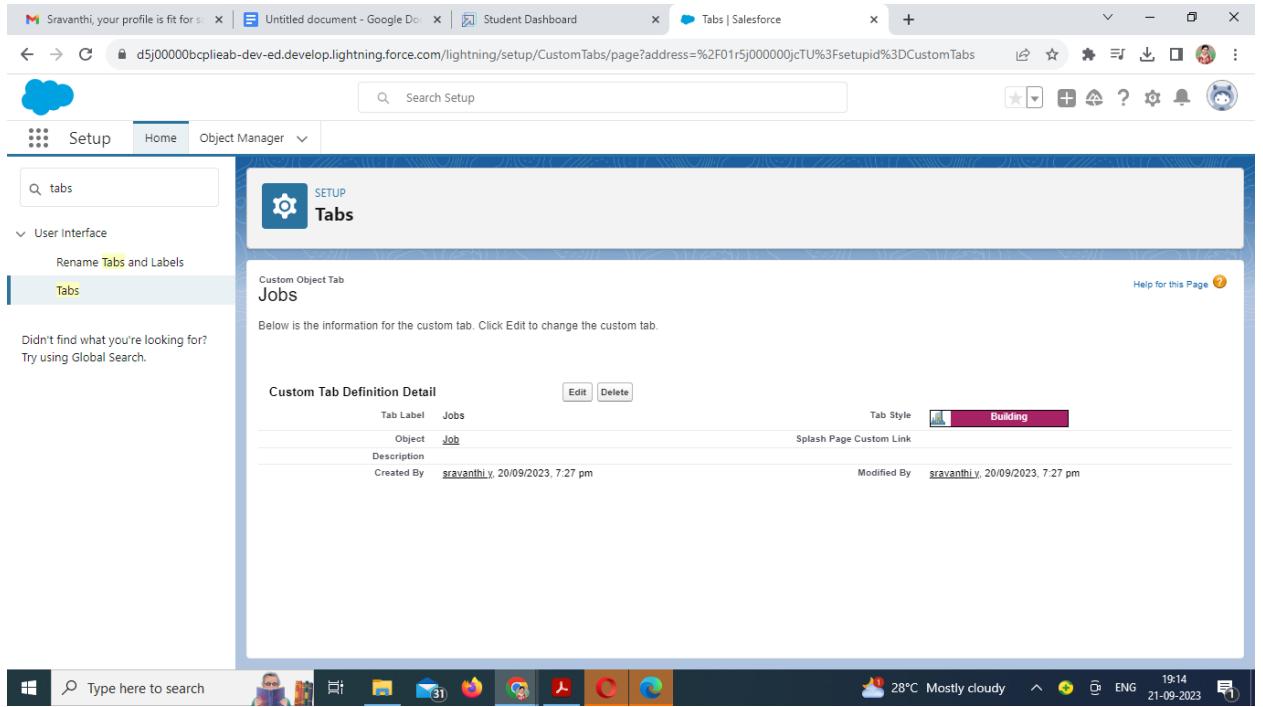


- 2.Under custom object tabs, click New.
- 3.For Object, select Recruiter.
- 4.For Tab Style, select any icon.
- 5.Leave all defaults as is. Click Next, Next, and Save.

Creation Of Job Tab

Now create a custom tab.

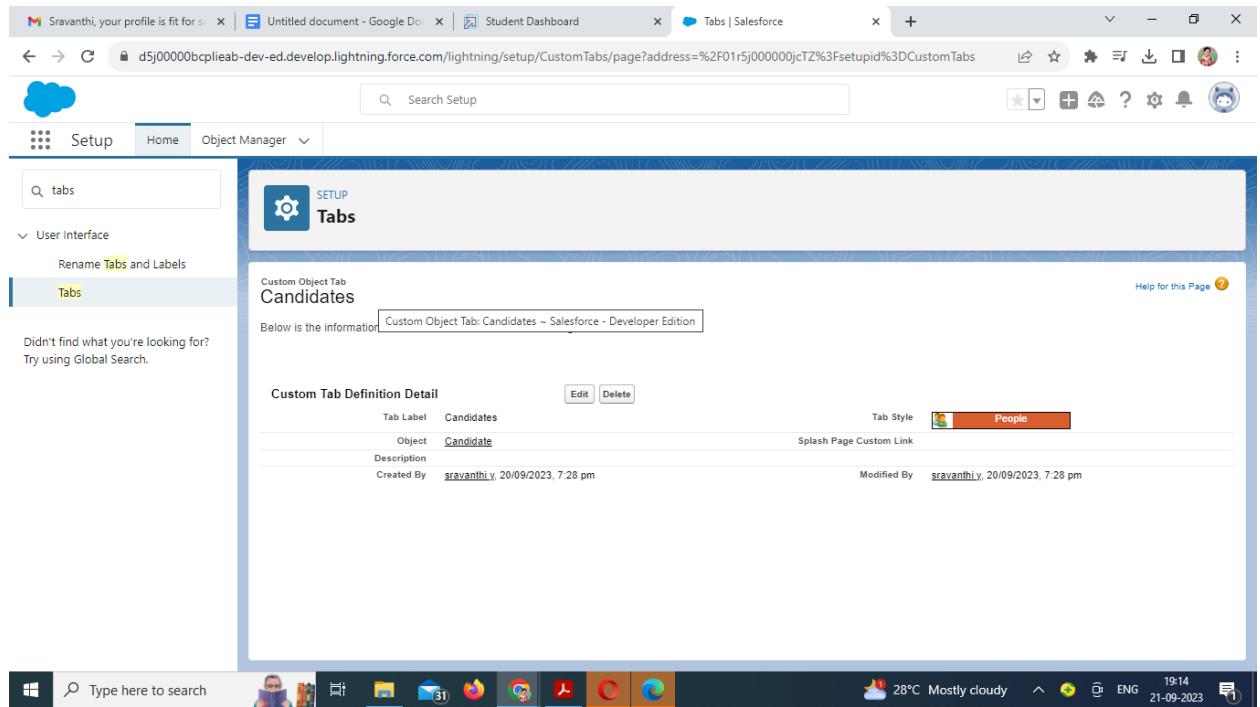
1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
2. Under custom object tabs, click New.
3. For Object, select Job.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.



Creation Of Candidate Tab

Now create a custom tab.

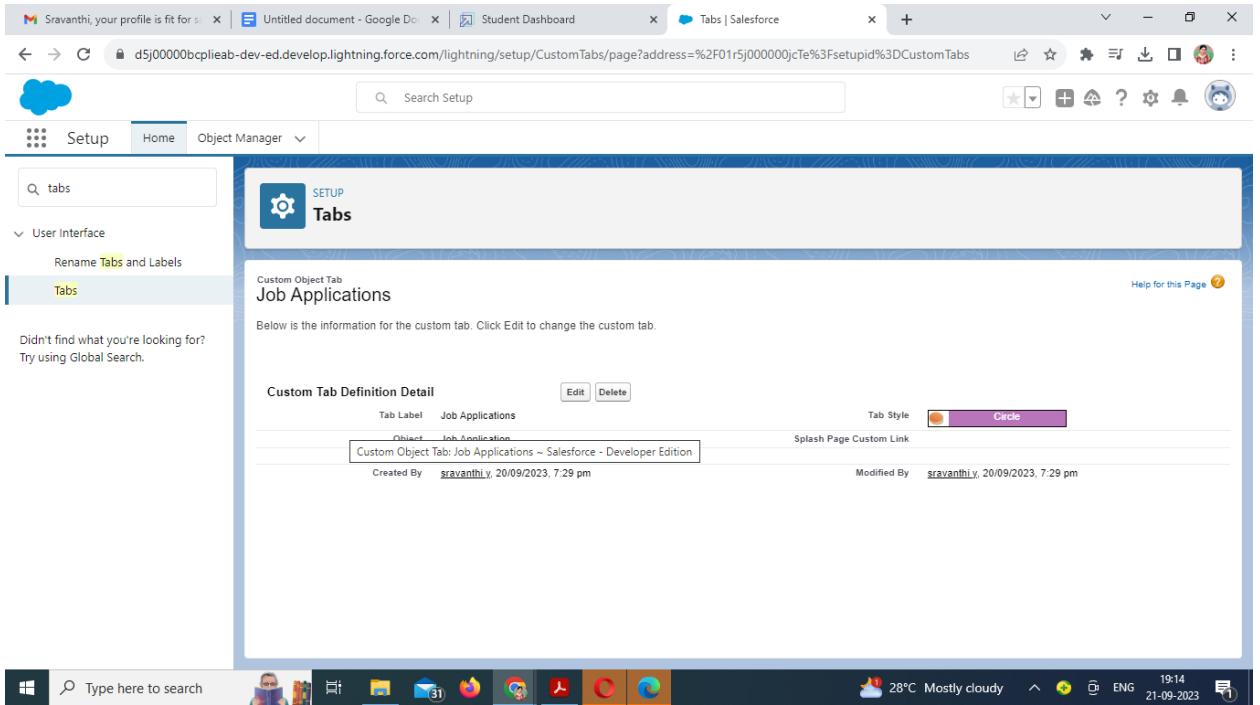
1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
2. Under custom object tabs, click New.
3. For Object, select Candidate.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.



Creation Of Job Application Tab

Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
2. Under custom object tabs, click New.
3. For Object, select Job Application.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.



Lightning App

What is an App?

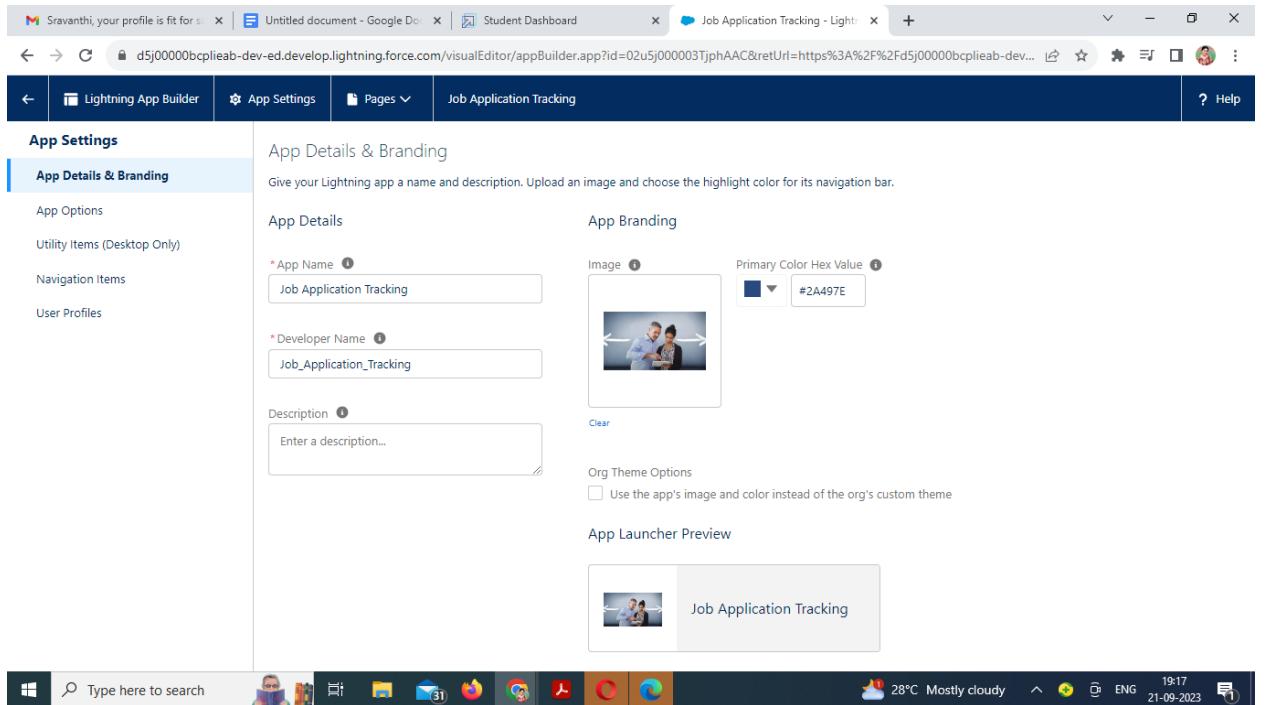
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

- Standard apps: these apps come with every occurrence of Salesforce as default. Community, Call Center, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.
- Custom apps: these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

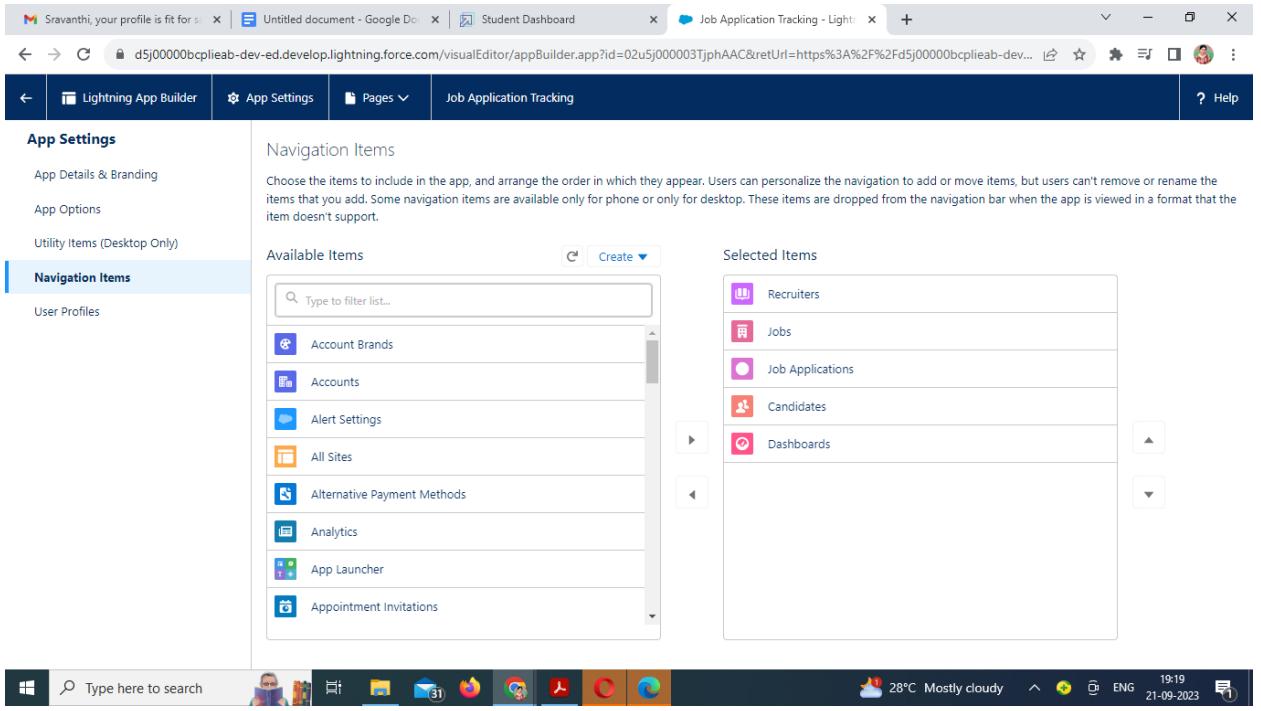
Create The Job Application Tracking App

- From Setup, enter App Manager in the Quick Find and select App Manager.

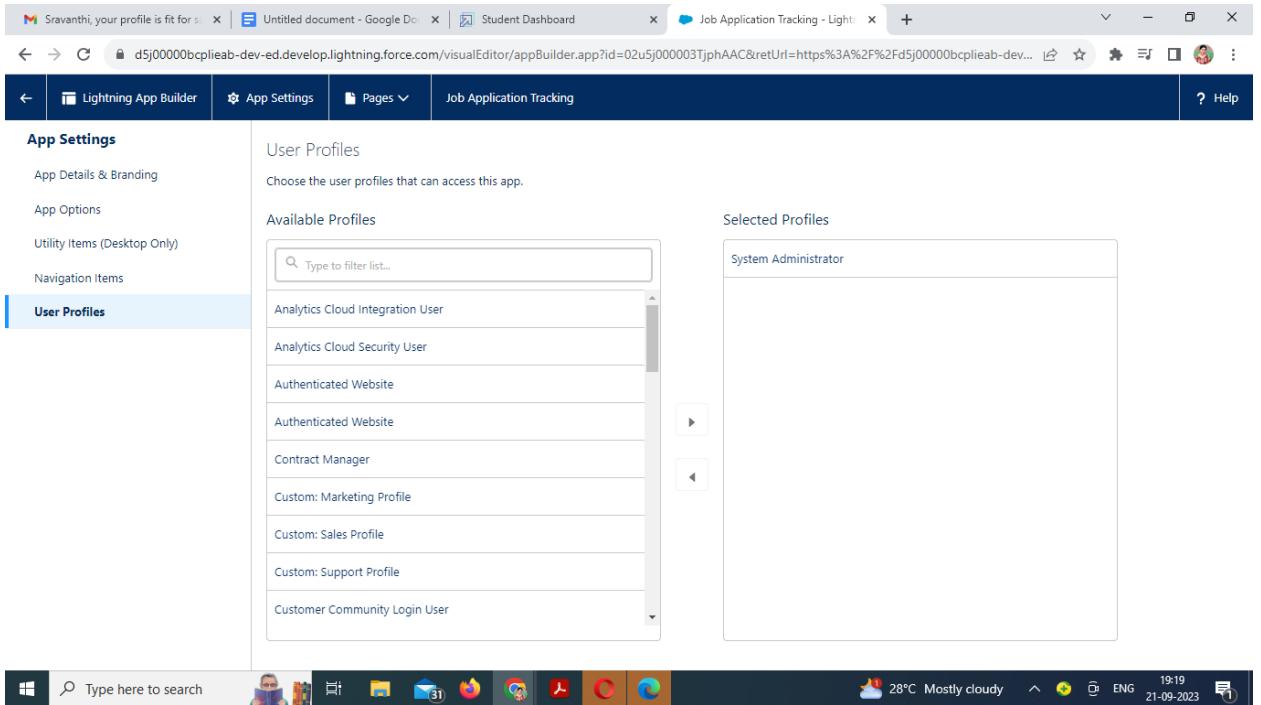


Click New Lightning App. Job Application Tracking as the App Name, then click Next

- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Recruiters, Jobs,Candidates,Job Application Reports, and Dashboards and move them to Selected Items. Click Next.



- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



- To verify your changes, click the App Launcher, type Job Application and select the Job Application app.

Fields And Relationship

What are fields?

Fields in Salesforce represent what the columns represent in relational databases. 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.

Creation Of Fields For The Recruiter Objects

click the gear icon and select Setup. This launches Setup in a new tab.

Click the Object Manager tab next to Home.

Select Recruiter.

Select Fields & Relationships from the left navigation, and click New

The screenshot shows the Salesforce Object Manager interface for the 'Recruiter' object. The left sidebar has 'Fields & Relationships' selected. The main area displays a table titled 'Fields & Relationships' with 12 items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes standard fields like Created By, Currency, Description, Email, Job Application Id, Job Title, Last Modified By, Location, and several custom fields starting with 'Recruiter_'. The 'CONTROLLING FIELD' column shows that some fields like Job Application Id and Job Title have their own controlling fields, while others like Owner and Phone do not.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Description.	Description__c	Text Area(255)		
Email	Email__c	Email		
Job Application Id	Job_Application_Id__c	Auto Number		
Job Title	Job_Title__c	Text(20)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Text(20)		

This screenshot is identical to the one above, showing the same list of fields for the 'Recruiter' object in the Salesforce Object Manager. The table structure and data remain the same, reflecting the standard fields available for the object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Description.	Description__c	Text Area(255)		
Email	Email__c	Email		
Job Application Id	Job_Application_Id__c	Auto Number		
Job Title	Job_Title__c	Text(20)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Text(20)		

From the sidebar, click Fields & Relationships. Notice that there are already some fields there. Those are the standard fields.

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.

5.Choose the data type as Auto number, click next

6.Enter field label(Recruiter Number), Display formate RN-{0000} Starting number(1) and click next

7.Next,Next and Click save.

Now let's create the other fields follow above Activity1 steps 1 to 4 and we must choose the data types of the fields carefully

Select the Text as the Data Type, then click Next. For Field Label, Job Title. Enter Length (20) Click Next, Next, then Save & New.

1. Select the Email as the Data Type, then click Next. For Field Label, Email.
2. Click Next, Next, then Save & New.
3. Select the phone as the Data Type, then click Next. For Field Label, Phone.
4. Click Next, Next, then Save & New.

Creation Of Fields For The Job Objects

Follow the above steps from 1 to 4 of activity 1

1.Select the Auto number as the Data Type, then click Next.

For Field Label, enter Job Application Id., Display format (J-{000}) starting number (001)
Click Next, Next, then Save & New

2.Select the Text area as the Data Type, then click Next. For Field Label, Description.

Click Next, Next, then Save & New.

3.Select the Text as the Data Type, then click Next. For Field Label, enter Location, and length (20) Click Next, Next, then Save & New

Description	Field Name	Type
Description	Description_c	Text Area(255)
Education	Education__c	Picklist
Email	Email__c	Email
Job Application Id	Job_Application_Id__c	Auto Number
Job Name	Name	Text(80)
Last Modified By	LastModifiedById	Lookup(User)
Location	Location__c	Text(20)
Phone	Phone__c	Phone

Creation Of Master-Detail Relationship For Job Object

- 1.From Setup, go to Object Manager
- 2.On the sidebar, click Fields & Relationships.
- 3.Click New.

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'Job' and includes sections for Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and lists 13 items, sorted by Field Label. The fields listed are:

Field Label	Type	Description
Email	Email	Email
Job Application Id	Auto Number	Job_Application_Id_c
Job Name	Text(80)	Name
Last Modified By	Lookup(User)	LastModifiedById
Location	Text(20)	Location_c
Phone	Phone	Phone_c
Recruiter Name	Master-Detail(Recruiter)	Recruiter_c
Skill Set	Text Area(255)	Skill_Set_c

- 4.Choose Master-detail Relationship and click Next

- 5.Choose the related object(Recruiter) and select that object.

- 6.Enter the label name(Recruiter Name)

- 7.Click Next, Next, and Save

Creation Of Fields For The Candidate Object

Follow the above steps from 1 to 4 of activity 1

- 1.Select the Text area as the Data Type, then click Next. For Field Label, Address,

Click Next, Next, then Save & New.

2. Select the Email as the Data Type, then click Next. For Field Label, enter Email.

Click Next, Next, then Save & New.

3. Select the Phone as the Data Type, then click Next. For Field Label, enter Phone.

Click Next, Next, then Save & New

4. Select Picklist as the Data Type and click Next. For Field Label enter Education.

Select Enter values, with each value separated by a new line and enter these values: Graduation , Post-Graduation. Click Next, Next, then Save & New.

5. Select the Text area as the Data Type, then click Next. For Field Label, enter Skill Set.

Click Next, Next, then Save & New

The screenshot shows the Salesforce Object Manager interface for the 'Candidate' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays the 'Fields & Relationships' section, which lists 11 items sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		
Candidate Name	Name	Text(80)		✓
City	City_c	Picklist	State	
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Education	Education_c	Picklist		
Email	Email_c	Email		

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Shows tabs for "Setup", "Home", and "Object Manager".
- Breadcrumbs:** "SETUP > OBJECT MANAGER" and "Candidate".
- Left Sidebar:** A navigation menu with options like "Details", "Fields & Relationships" (which is selected), "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", "Field Sets", "Object Limits", "Record Types", "Related Lookup Filters", and "Search Layouts".
- Table:** Titled "Fields & Relationships" with 11 items. It lists fields such as "Created By", "Currency", "Education", "Email", "Last Modified By", "Owner", "Phone", and "State". Each row includes the field name, its type (e.g., "CreatedBy", "CurrencyIsoCode", "Education__c", etc.), and its description (e.g., "Lookup(User)", "Picklist", etc.).
- Toolbar:** Includes "Quick Find", "New", "Deleted Fields", "Field Dependencies", and "Set History Tracking" buttons.
- System Bar:** Shows the search bar "Type here to search", system status icons, and a system status bar indicating "28°C Mostly cloudy" and the date "21-09-2023".

Create Picklist Fields On Candidate Object

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, Select candidate Object
- Now Select Fields and relationships from setup menu of the candidate object.
- Click new and select Picklist fields ????next and enter label name(State) and select enter values option

(Rajasthan, UP, MP, Punjab), next, next and Save.

The screenshot shows the Salesforce Setup interface for the Candidate object. The left sidebar has 'Fields & Relationships' selected. The main area displays a table of fields:

Created By	CreatedById	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Education	Education__c	Picklist
Email	Email__c	Email
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Phone	Phone__c	Phone
State	State__c	Picklist

Follow same above steps for create city and Education Picklist fields with their values.

1. Select Picklist as the Data Type and click Next. For Field Label name City

And Select Enter values, with each value separated by a new line and enter these values

(Jaipur, Jalandhar, Lucknow, Bhopal), next, next and Save.

2. Select Picklist as the Data Type and click Next. For Field Label enter Education.

Select Enter values, with each value separated by a new line and enter these values: Graduation , Post-Graduation. Click Next, Next, then Save & New

Create Field Dependency (On Candidate Object)

Create a dependency between these two picklists, so that when a state is selected, only respective Values are available.
The below steps will assist you in creating Field Dependencies.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, Select Candidate Object
- Now Select Fields and relationships from setup menu of the Candidate object.
- Click Field Dependencies.
- Click New.
- Select State as the Controlling Field and select City as the Dependent Field.

- Click Continue.
- Select the appropriate Value in each column by double-clicking them.
- For Ex. Rajasthan - Jaipur
- Click Include Values. And it is also same for UP, MP & Punjab with its city.
- Click Preview, then test the dependency by selecting different State and viewing the associate Values available for Particular state.
- Click Close to close the preview window.
- Click Save.

The screenshot shows the Salesforce setup interface for managing object relationships. The main area displays a dependency grid for the 'Candidate' object's 'State' field. The grid has four columns representing states: Rajasthan, UP, MP, and Punjab. Each column contains a list of cities: Jaipur, Jalandhar, Lucknow, and Bhopal. The 'Rajasthan' column is highlighted with a yellow background, indicating it is the selected controlling field. The 'UP' column is also highlighted with a yellow background. A legend in the top right corner defines 'Included Value' (yellow) and 'Excluded Value' (grey). Instructions at the bottom of the grid explain how to use the 'Include Values' and 'Exclude Values' buttons to manage dependencies.

Creation Lookup Relationship For The Job Application Objects

Let's create two lookup relationship on job application object First lookup relationship

From Setup, go to Object Manager

- On the sidebar, click Fields & Relationships.
- Select Lookup relationship & click next
- Choose the related object as Candidate & click next
- Give the field label(Candidate name) & click next, next, next and Save

Second lookup relationship

- From Setup, go to Object Manager
- On the sidebar, click Fields & Relationships.
- Select Lookup relationship & click next
- Choose the related object as Job & click next
- Give the field label(Job Name) & click next, next, next and Save

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Home, Object Manager, and a search bar. The main title is "Job Application". The left sidebar lists various setup options under "SETUP > OBJECT MANAGER". The central content area is titled "Fields & Relationships" and displays a table of fields for the "Job Application" object. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The listed fields are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate name	Candidate__c	Lookup(Candidate)		✓
Created By	CreatedById	Lookup(User)		✓
Currency	CurrencyIsoCode	Picklist		✓
Job Application Number	Name	Auto Number		✓
Job Name	Job__c	Lookup(Job)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Owner	OwnerId	Lookup(User,Group)		✓

Profile

What is a 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

- 1.From setup , enter profiles in Quick Find box
- 2.Select profiles (Standard user).
- 3.Click clone.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The 'Standard User' profile is displayed, showing its permissions and page layouts. The 'Edit' button is highlighted. The browser address bar shows the URL for the Enhanced Profiles page.

- 4.For Profile, enter Recruiter.

The screenshot shows the 'Clone Profile' screen in the Salesforce Setup. A red arrow points to the 'Profiles' link in the left sidebar. Another red arrow points to the 'Profile Name' input field, which contains the value 'Recruiter'. The 'Save' button is visible at the bottom of the form.

5.Click save.

Create A Custom Profile-2

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

- 1.From setup , enter profiles in Quick Find box
- 2.Select profiles (Standard user).
- 3.Click clone.

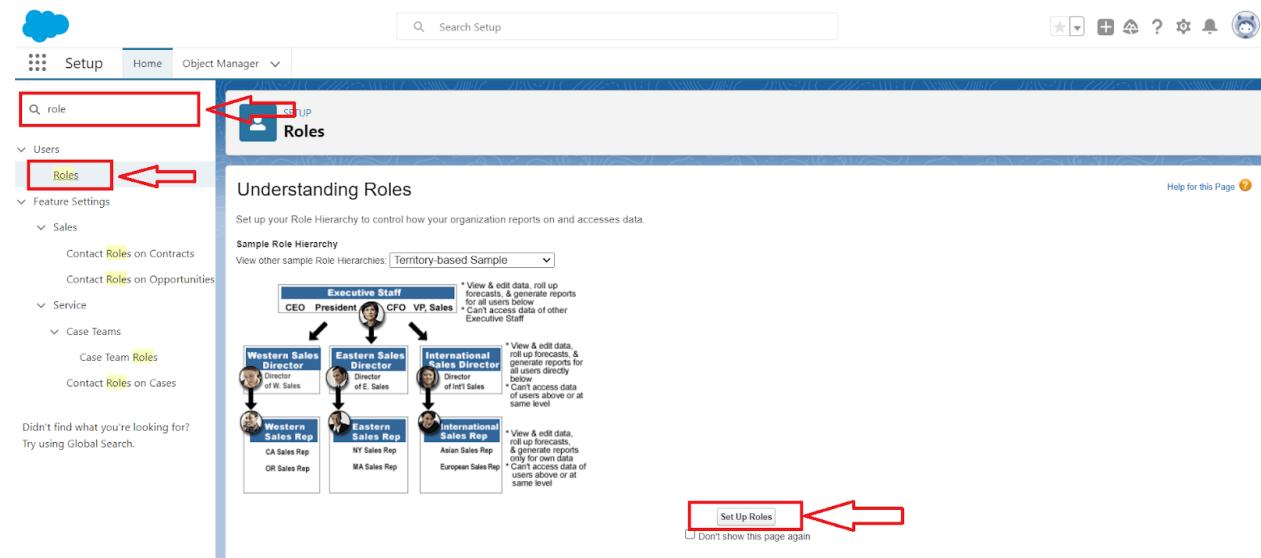
Follow the steps from above Activity

Role

In Salesforce, roles are used to determine which users have access to certain data and functions within the system. They are also used to define the reporting hierarchy within an organization. Users with higher roles have greater access to data and more control over the system.

Creation Of Role

- 1.From the Quick find box search for the role and click on the roles option
- 2.select the set up roles option



3.Below the CEO click on add role and enter the label name as a " HR Manager " and role name will be Automatically populated and click on save.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapsible All Expand All

- THESMARTBRIDGE
 - Add Role**
 - CEO** **Edit** | **Del** | **Assign**
 - Add Role**

Help for this Page ⓘ

Show in tree view ▾

Role **HR Manager**

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Accenture > **CEO** > HR Manager
Siblings: Sales Executive, SVP Sales & Marketing, SVP Customer Service & Support, CFO, SVP Human Resources, COO, Vehicle Manager

Users in HR Manager Role [?]

Role Detail

Label	HR Manager	Role Name	HR_Manager
This role reports to	CEO	Role Name as displayed on reports	
Modified By	saravanthi_y, 21/09/2023, 10:00 am	Sharing Groups	Role, Internal and Portal Subordinates, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		
Partner Role	<input type="checkbox"/>		
Customer Role	<input type="checkbox"/>		

Users in HR Manager Role

Assign Users to Role | New User

No records to display

User

What is a 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.

To Create A User

- 1.From Setup, enter Users in the Quick Find box, then select Users.
- 2.Click New User.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'User Management Settings', the 'Users' link is highlighted with a red box and a red arrow pointing to it. At the top of the main content area, there is a horizontal bar with three buttons: 'New User' (highlighted with a red box), 'Reset Password(s)', and 'Add Multiple Users'. The main table displays a list of users with columns for 'Action', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. Each user row has edit and delete icons. The 'Active' column contains checkmarks for most users. The 'Profile' column lists various profiles like 'System Administrator', 'Custom Profile', and 'Analytics Cloud Integration User'. At the bottom of the table, there are three buttons: 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

- 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(Recruiter).

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, there's a sidebar with various setup options like 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'New Salesforce Mobile App QuickStart', 'Lightning Usage', 'Optimizer', and sections for 'ADMINISTRATION' and 'Users'. The main area is titled 'New User' under 'User Edit'. It has a 'General Information' section with fields for First Name ('Ira'), Last Name ('Manager'), Alias ('Himana'), Email ('veruprakashd@outlook.com'), Username ('Himanager@example.com'), Nickname ('User167146303902005138'), Title (''), Company (''), Department (''), and Division (''). To the right, there are sections for 'Role' (set to '<None Specified>'), 'User License' (set to 'Salesforce Platform'), 'Profile' (set to 'Standard Platform User'), and 'Active' (checkbox checked). Below these are several checkboxes for user types: Marketing User, Offline User, Knowledge User, How User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type (set to '-None-'). There are also links for 'Data.com Monthly Addition Limit' (Default Limit (300)) and 'Accessibility Mode (Classic Only)'.

8.Click save

Create Another User

Create a user with a username as “Ganesh Gelli”, and assign him the sales Manager profile. Follow the steps from above Activity

Sharing Rules

What are Sharing Rules?

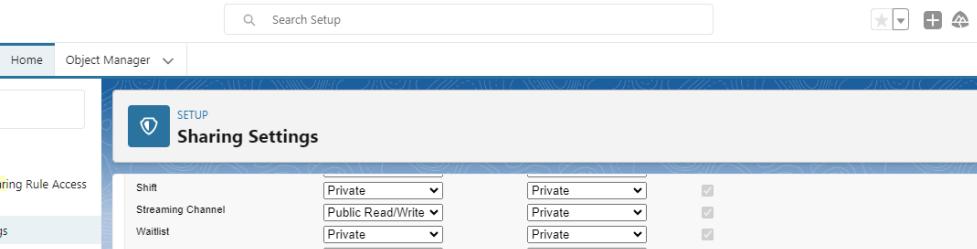
Sharing rules help users to share records based on conditions. It is basically created for objects whose organization-wide defaults (OWD) are set to public read-only or private because sharing rules can only extend the access and not restrict it.

Types of sharing rules,

- Owner-based Sharing Rules
- Criteria-based Sharing Rules

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.



The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar with 'shar' typed in, a 'Security' section, and a 'Sharing Settings' section which is currently selected. Below it is a note: 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Sharing Settings' and lists sharing rules for various objects. Each object has a dropdown menu for 'Shift' (Private, Public Read/Write, Candidate) and a checkbox for 'Share'. The objects listed are: Shift, Streaming Channel, Waitlist, Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Work Type, Work Type Group, bill, Candidate, Case, Course, Course Leads, customer_type__c, Department, and Driver.

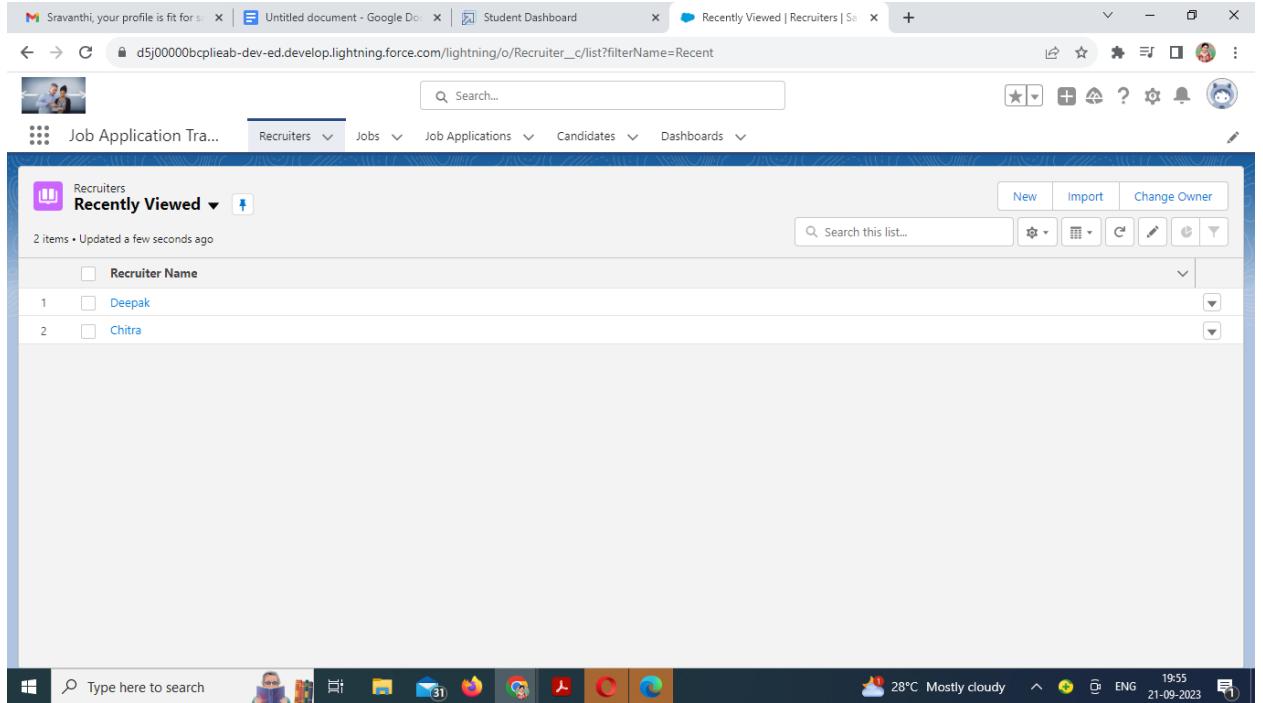
Object	Shift	Share
Shift	Private	<input checked="" type="checkbox"/>
Streaming Channel	Public Read/Write	<input checked="" type="checkbox"/>
Waitlist	Private	<input checked="" type="checkbox"/>
Web Cart Document	Private	<input checked="" type="checkbox"/>
Work Order	Private	<input checked="" type="checkbox"/>
Work Plan	Private	<input checked="" type="checkbox"/>
Work Plan Template	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	<input checked="" type="checkbox"/>
Work Type	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	<input checked="" type="checkbox"/>
bill	Public Read/Write	<input checked="" type="checkbox"/>
Candidate	Public Read/Write	<input checked="" type="checkbox"/>
Case	Public Read/Write	<input checked="" type="checkbox"/>
Course	Public Read/Write	<input checked="" type="checkbox"/>
Course Leads	Public Read/Write	<input checked="" type="checkbox"/>
customer_type__c	Public Read/Write	<input checked="" type="checkbox"/>
Department	Public Read/Write	<input checked="" type="checkbox"/>
Driver	Public Read/Write	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar and navigation links for Home, Object Manager, and Security. Under Security, 'Sharing Settings' is selected. The main content area is titled 'Sharing Settings' and lists sharing rules for various objects. Each row contains three dropdown menus: the first for object type, the second for sharing level (e.g., Public Read/Write, Private), and the third for sharing rule access (e.g., Public Read/Write, Private). A checkmark column indicates if a sharing rule is active. The objects listed include Case, Course, Course Leads, customer_type__c, Department, Driver, Instructor, Job Application, Man-Power, New Course, Property, Recruiter, Student, Subjects, Supply, Supply, and Travel Approval.

Object	Sharing Level	Access
Case	Public Read/Write	Private
Course	Public Read/Write	Private
Course Leads	Public Read/Write	Private
customer_type__c	Public Read/Write	Private
Department	Public Read/Write	Private
Driver	Public Read/Write	Private
Instructor	Public Read/Write	Private
Job Application	Public Read/Write	Private
Man-Power	Public Read/Write	Private
New Course	Public Read/Write	Private
New Course	Public Read/Write	Private
New Course	Public Read/Write	Private
Property	Public Read/Write	Private
Recruiter	Public Read/Write	Private
Student	Public Read/Write	Private
Subjects	Public Read/Write	Private
Supply	Public Read/Write	Private
Supply	Public Read/Write	Private
Travel Approval	Public Read/Write	Private

Create A Record(Recruiter)

- Click on App Launcher on left side of screen.
- Search Job Application Tracking & click on it.
- Click on Recruiter Tab.
- Click new and fill details & Save



View A Record(Recruiter)

- Click on App Launcher on left side of screen.
- Search Job Application Tracking & click on it.
- Click on Recruiter Tab.
- Click on any record name. you can see the details of the Event.

The screenshot shows a Salesforce Lightning interface with the following details:

Recruiter Name: Deepak

Owner: sravanthi.y

Currency: INR - Indian Rupee

Created By: sravanthi.y, 21/09/2023, 10:53 am

Last Modified By: sravanthi.y, 21/09/2023, 10:53 am

Recruiter Name: Chitra

Owner: sravanthi.y

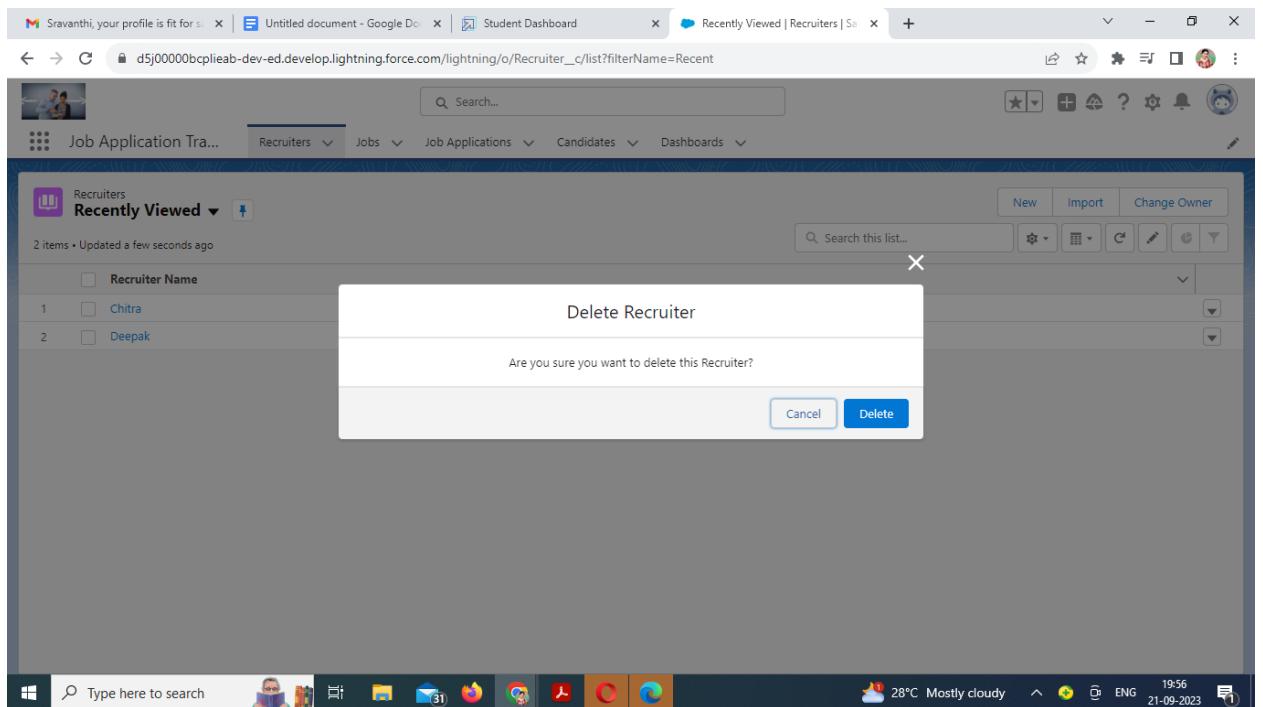
Currency: INR - Indian Rupee

Created By: sravanthi.y, 21/09/2023, 10:52 am

Last Modified By: sravanthi.y, 21/09/2023, 10:52 am

Delete A Record(Recruiter)

- Click on App Launcher on left side of screen.
- Search Job Application Tracking & click on it.
- Click on Recruiter Tab.
- Click on Arrow at right hand side on that Particular record.
- Click delete and delete again.



Reports

What are 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

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 job application with candidate name.

The screenshot shows the Salesforce Reports interface. The top navigation bar includes tabs for Recruiters, Jobs, Job Applications, Candidates, Dashboards, Reports, and a search bar. Below the navigation is a breadcrumb trail: Reports > Job Application Tra... The main content area displays a table of recent reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. One report, 'job application with candidate name', is highlighted in blue. The report details are visible in a tooltip: 'job application with candidate name. Which flows run, what's the status of each interview, and how long do users take to complete the screens?'. Other reports listed include 'Opportunity Details', 'Supply Costs', and various New Opportunities Reports.

3. In the details section select the option start report.
4. show me my job application and job application created date(All time)
5. In the outline pane, group rows select job application created date.

The screenshot shows the Salesforce Report builder for the 'Job Applications with Candidate Name' report. The top navigation bar is identical to the previous screenshot. The left sidebar contains an 'Outline' section where 'Job Application: Created Date' is selected as a group row. The main preview area shows a table with columns: Job Application: Created Date, Job Application: Job Application Id, Candidate Name: Candidate Name, Job Name, Candidate Name: State, and Candidate Name: Address. Two records are displayed: one for 08/04/2023 with Job Application Id J-001 and Candidate Name harry, and another for the same date with Job Application Id J-002 and Candidate Name sunny. The bottom of the screen shows report settings for Row Counts, Detail Rows, Subtotals, and Grand Total.

6. Save the report by giving label name(Job application wtih candidate name) and save the folder as a public folder and save the report.

Create Another Report

Create a Report using the Objects Jobs, Candidate and Job Application. Follow the steps from above Activity.

Dashboard

Dashboards provide more insights than reports as they combine the data from many reports and show a summarized result. Looking at many reports at a time gives the flexibility of combining the results from them quickly. Also summaries in dashboards help us decide on action plans quicker. The dashboards can contain charts, graphs and Tabular data.

Create A Dashboard

1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name the dashboard Job application wtih candidate name and click Create.
4. Click +Component.
5. Select the Job application wtih candidate name and click Select.
6. Select the Gauge chart and click Add.
7. Click Save and then Done.

Sravanti, your profile is fit for s | Untitled document - Google Doc | Student Dashboard | Dashboards | Salesforce

d5j000000bcplieab-dev.ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Job Application Tra... Recruiters Jobs Job Applications Candidates Dashboards Reports

Search...

Recent 6 items

DASHBOARDS Recent

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Opportunity and Dashboard	Private Dashboards	saravanti y	17/9/2023, 7:53 pm		
Job application wth candidate name	Private Dashboards	saravanti y	21/9/2023, 11:11 am		
Supply Costs Dashboard	Private Dashboards	saravanti y	9/8/2023, 11:52 am		
Dashboard	Private Dashboards	saravanti y	31/7/2023, 8:57 pm		
Dashboard 1	Private Dashboards	saravanti y	1/8/2023, 3:25 pm		
New Dashboard	Private Dashboards	saravanti y	1/8/2023, 3:23 pm		

Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites

Search here

28°C Mostly cloudy 19:59 21-09-2023

job application wtih candidate name



x



[View Report \(job application wtih candidate name\)](#)