# 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/
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:

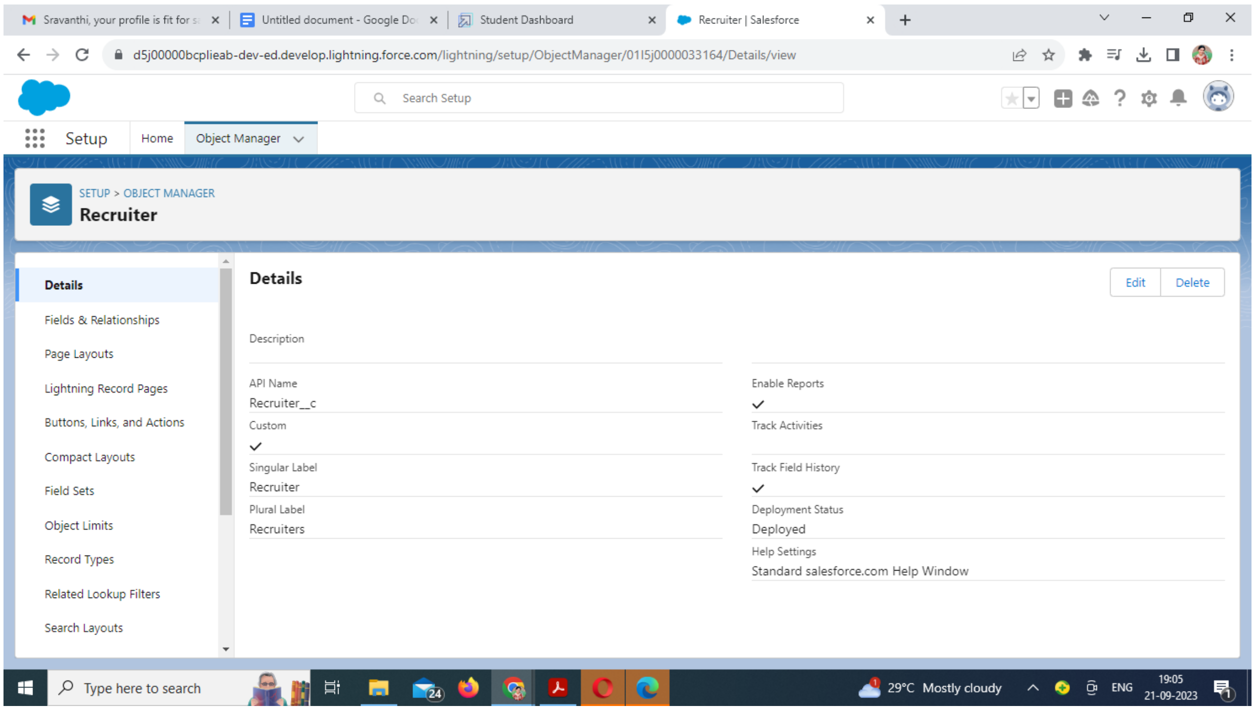
Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

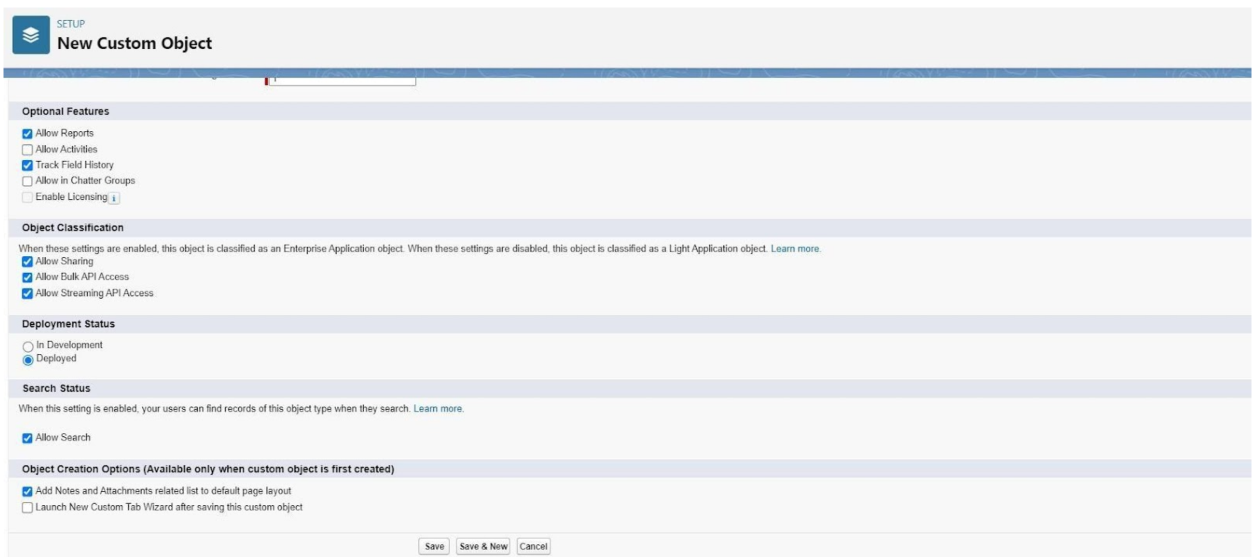
1.In This Application We Use 4 Custom Objects:
2.Recruiter
3.Jobs
4.Candidate
5.Job-Application

# 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.




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

# Creation Of Jobs Object

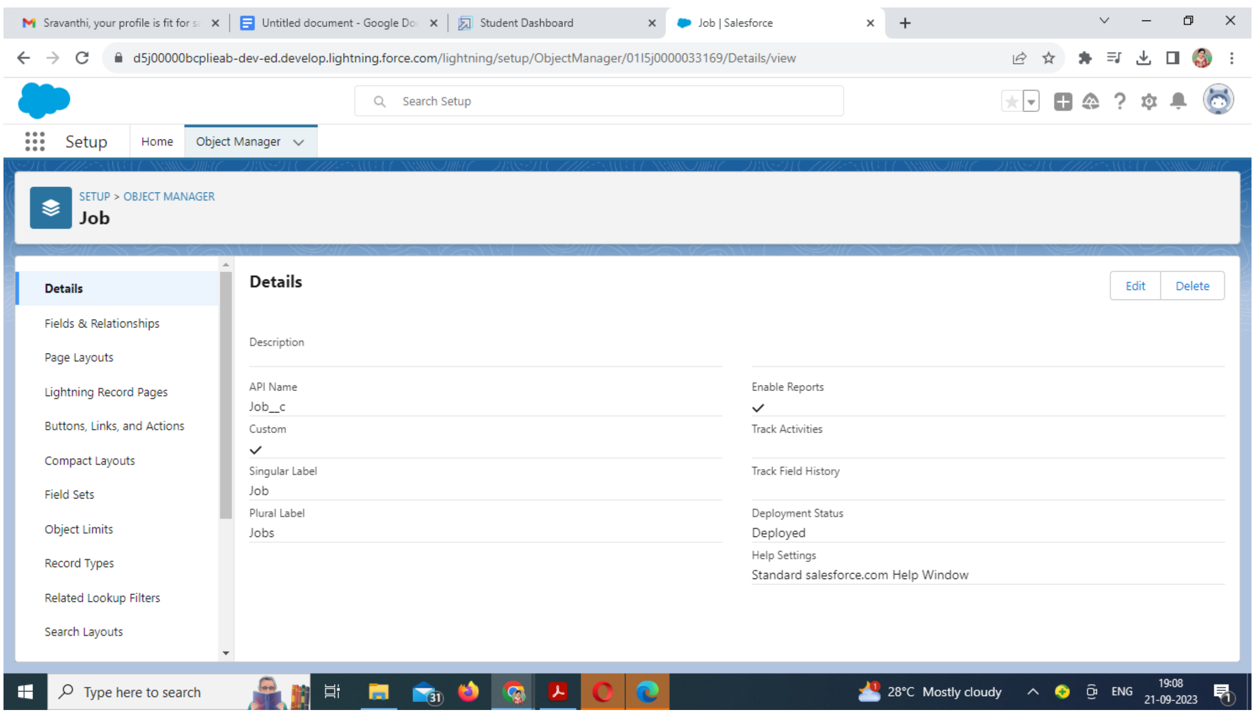
Click on the gear icon and then select Setup.

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.

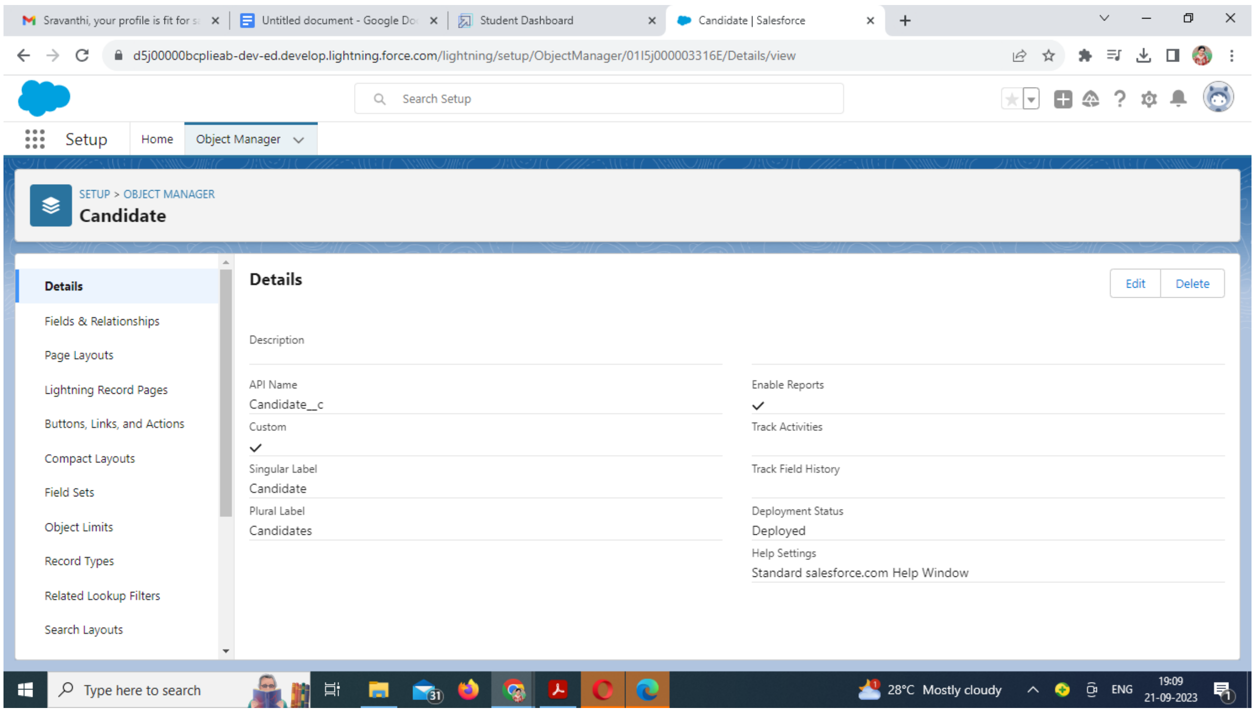



# Creation Of Candidate Object

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

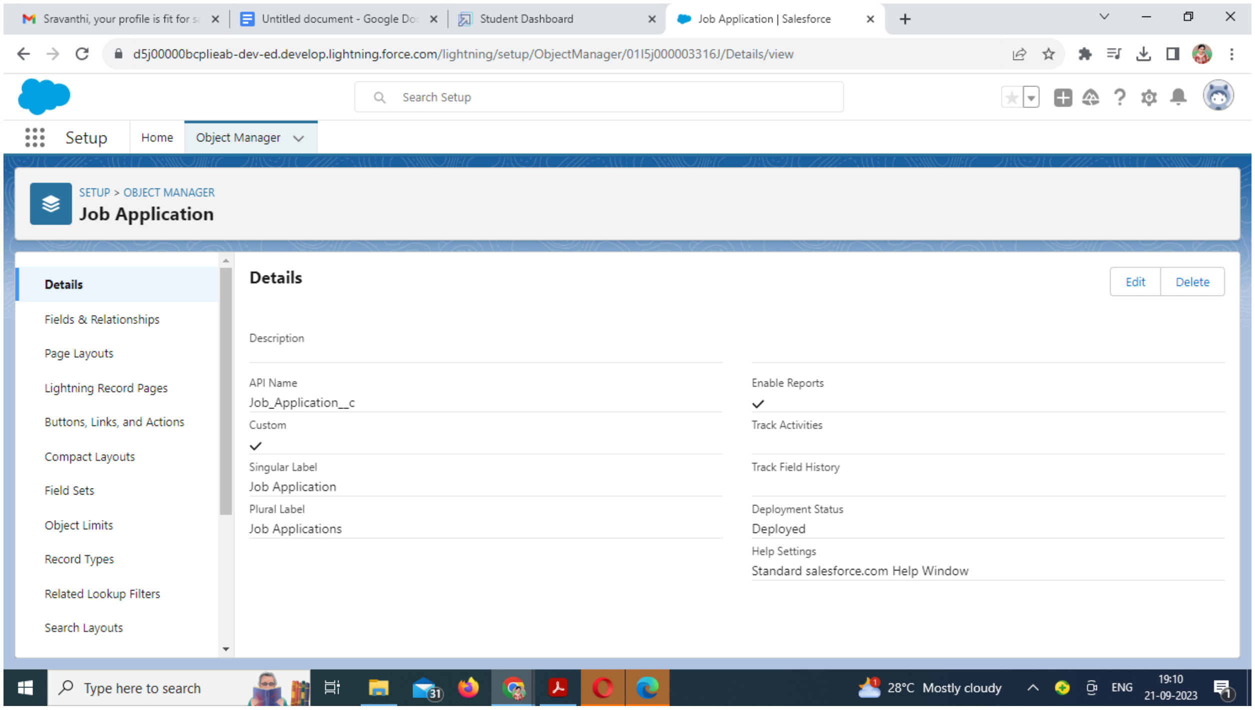
- Record Name: Candidates Name
- Select the data type as "Text".
- Check the Allow Reports checkbox.
- Check the Allow Search checkbox.
- In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
- Click Save.




# 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.

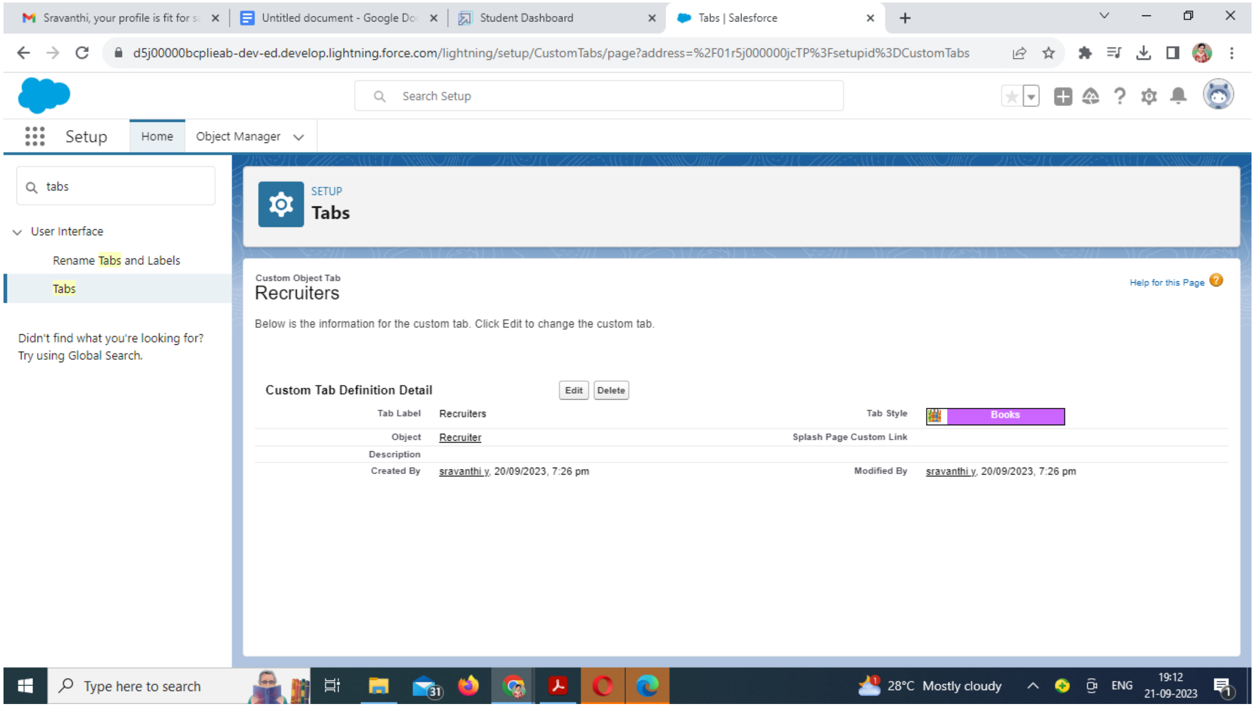
i. Check the Allow Search checkbox.
j. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
k. Click Save.




# Creation Of Recruiter Tab

Now create a custom tab.

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

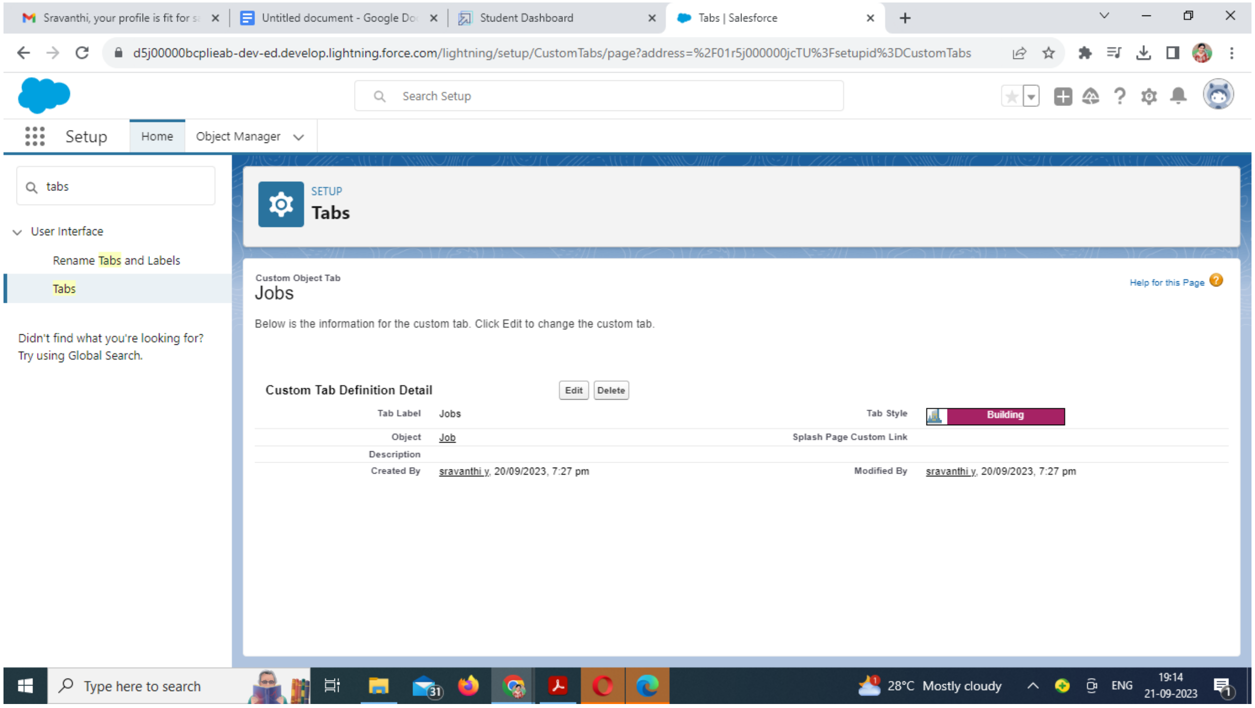


2.Under custom object tabs, click New.
3.For Object, select Recruiter.
4.For Tab Style, select any icon.
5.Leave all defaults as is. Click Next, Next, and Save.

# Creation Of Job Tab

Now create a custom tab.

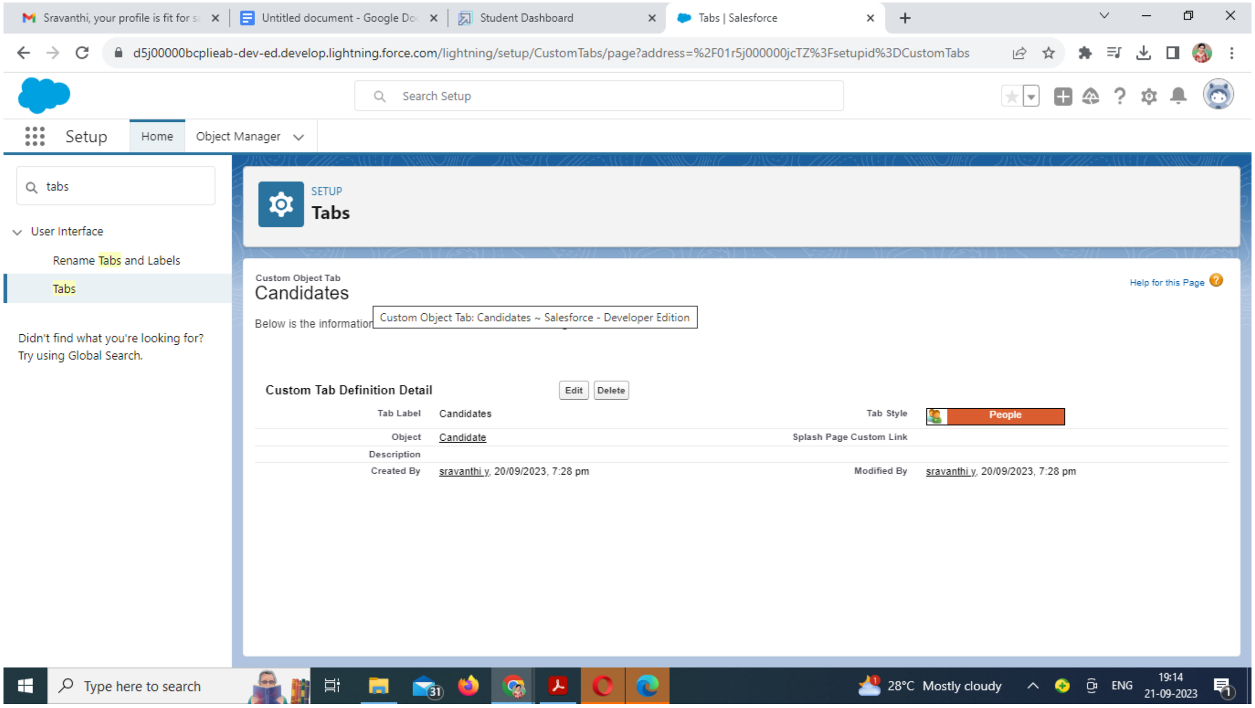
1. Click on  Home tab, enter Tabs in Quick Find and select Tabs.
2. Under custom object tabs, click New.
3. For Object, select Job.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.



# Creation Of Candidate Tab

Now create a custom tab.

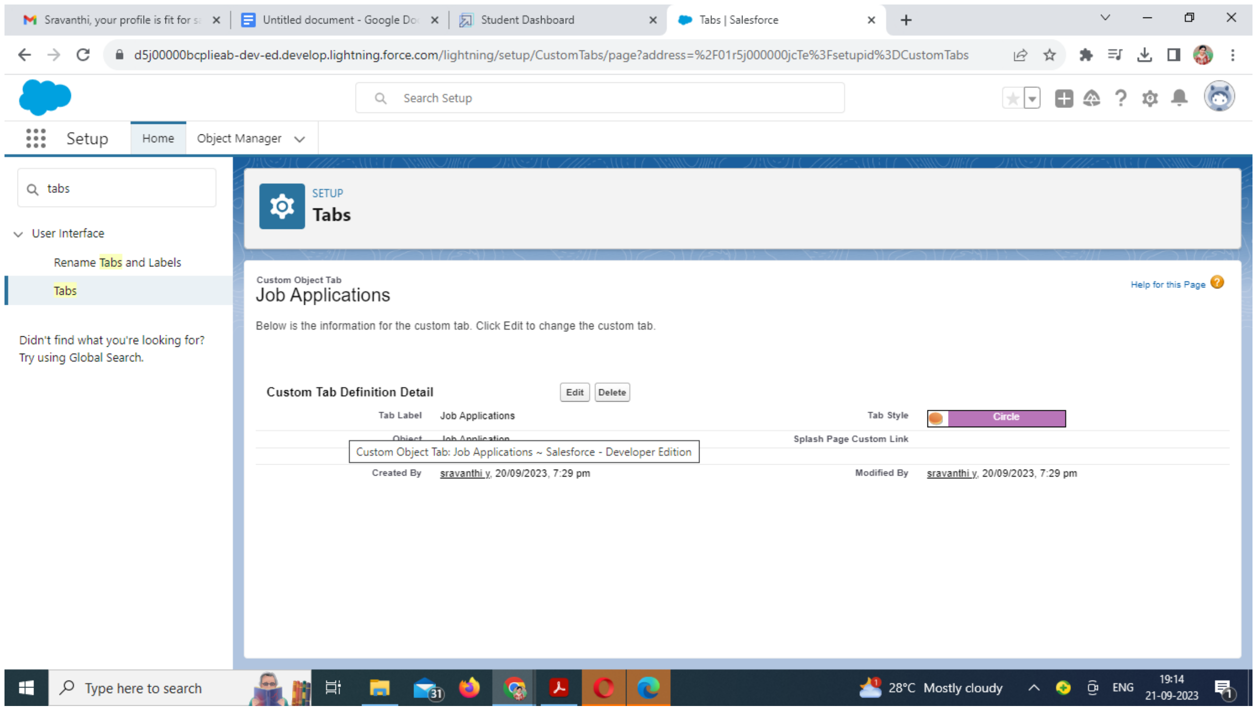
1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
2. Under custom object tabs, click New.
3. For Object, select Candidate.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.



# 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?

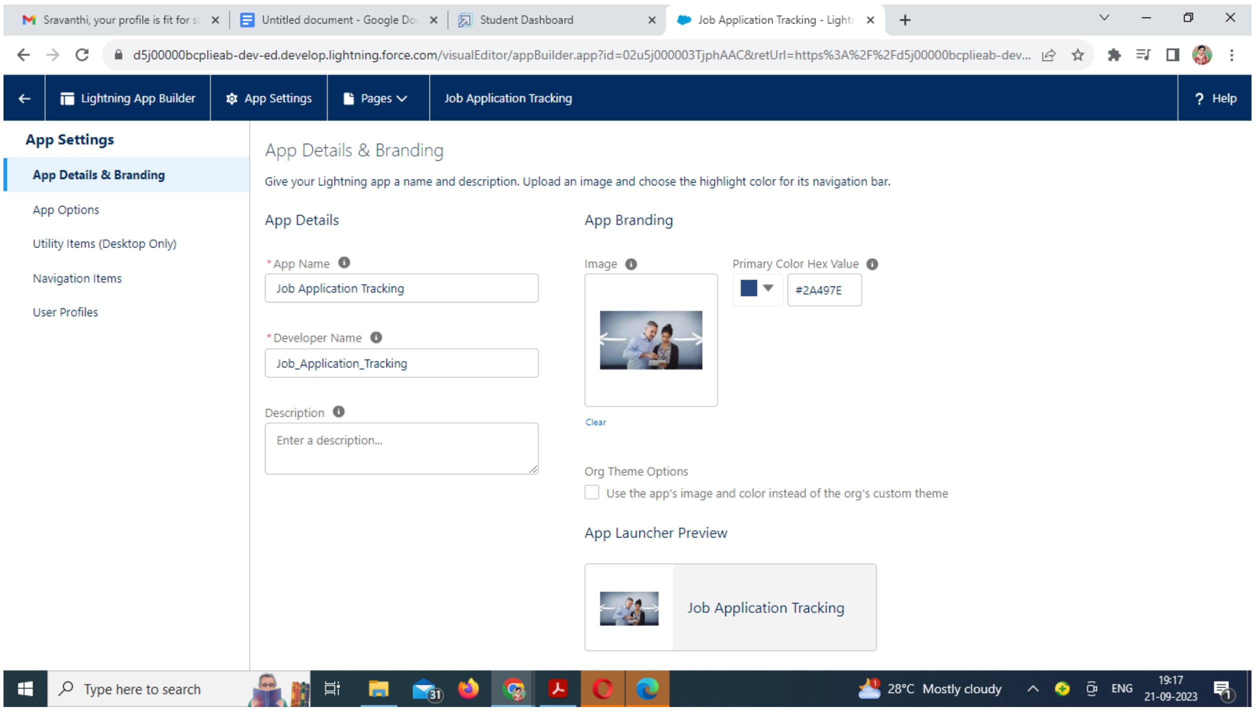
Apps in Salesforce are a group of tabs that help the application function by working together asa unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

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.

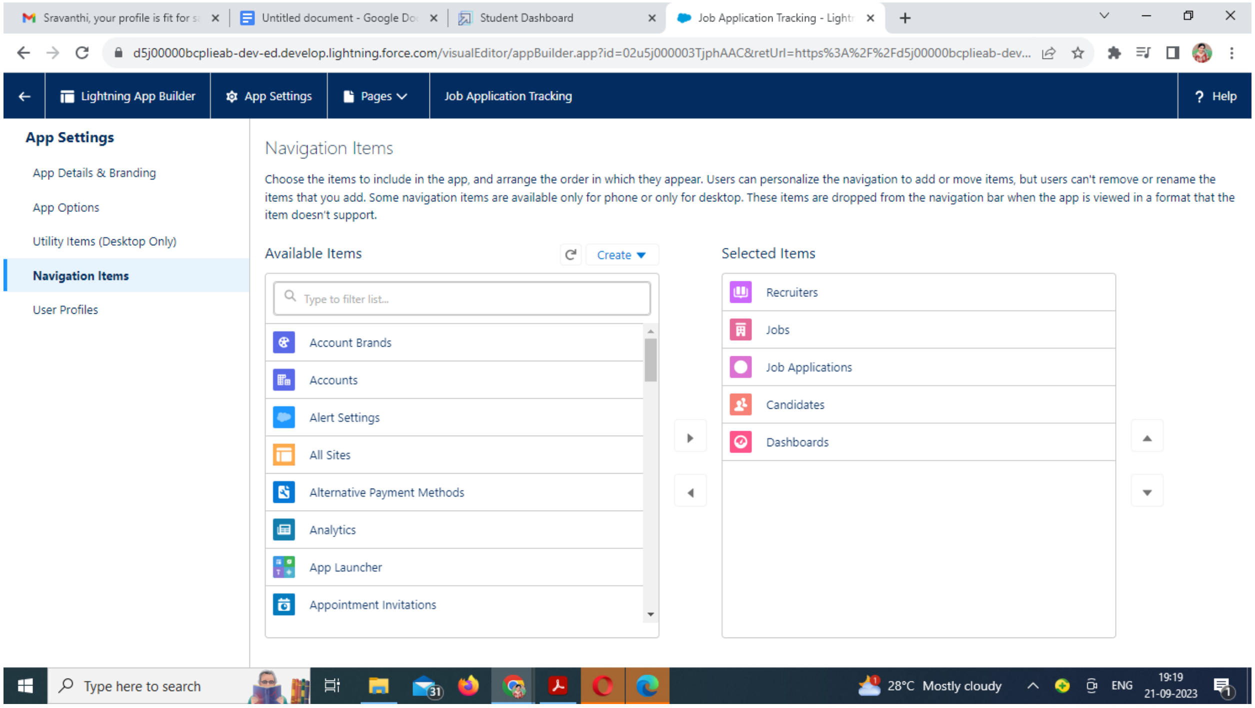
# Create The Job Application Tracking App

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

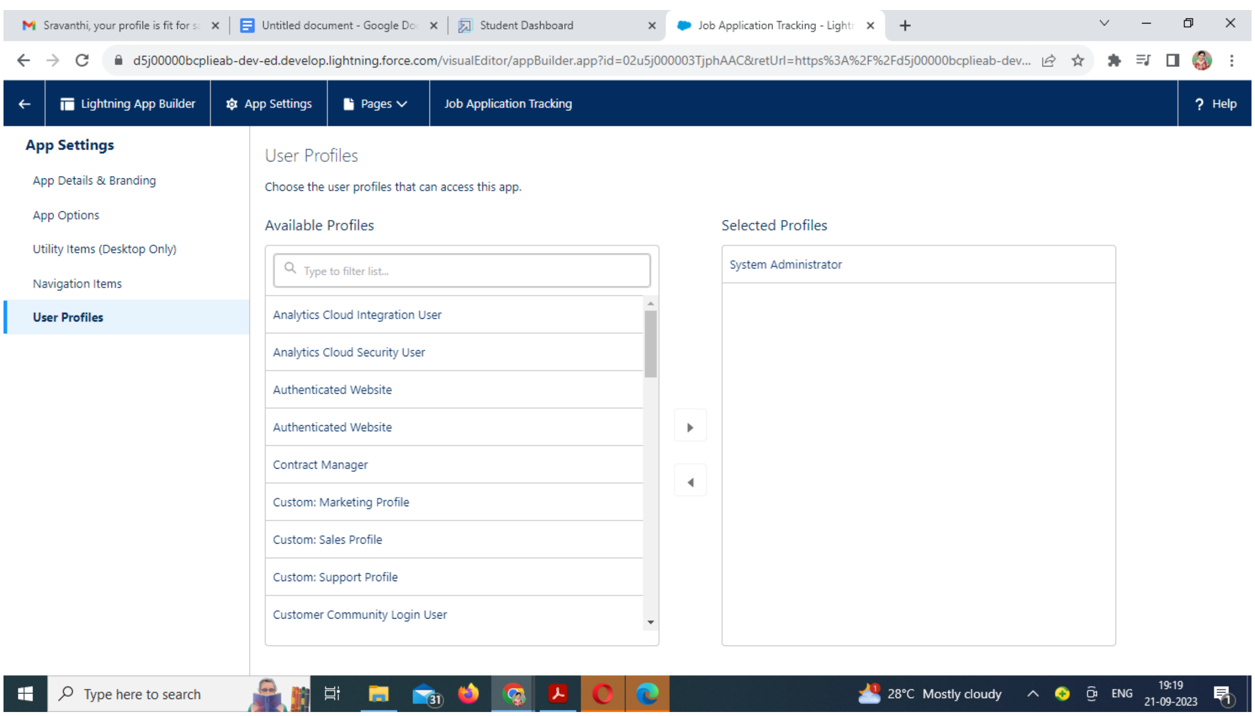



Click New Lightning App. Job Application Tracking as the App Name, then click Next

- 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

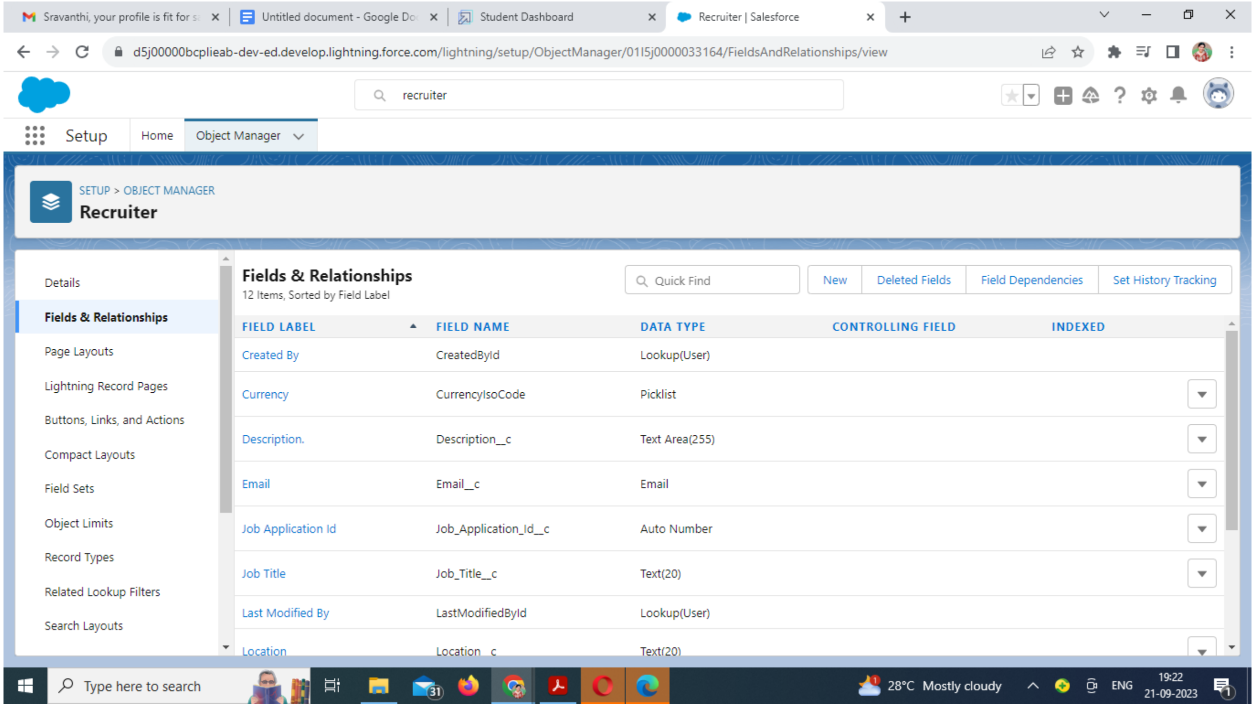
What are fields?

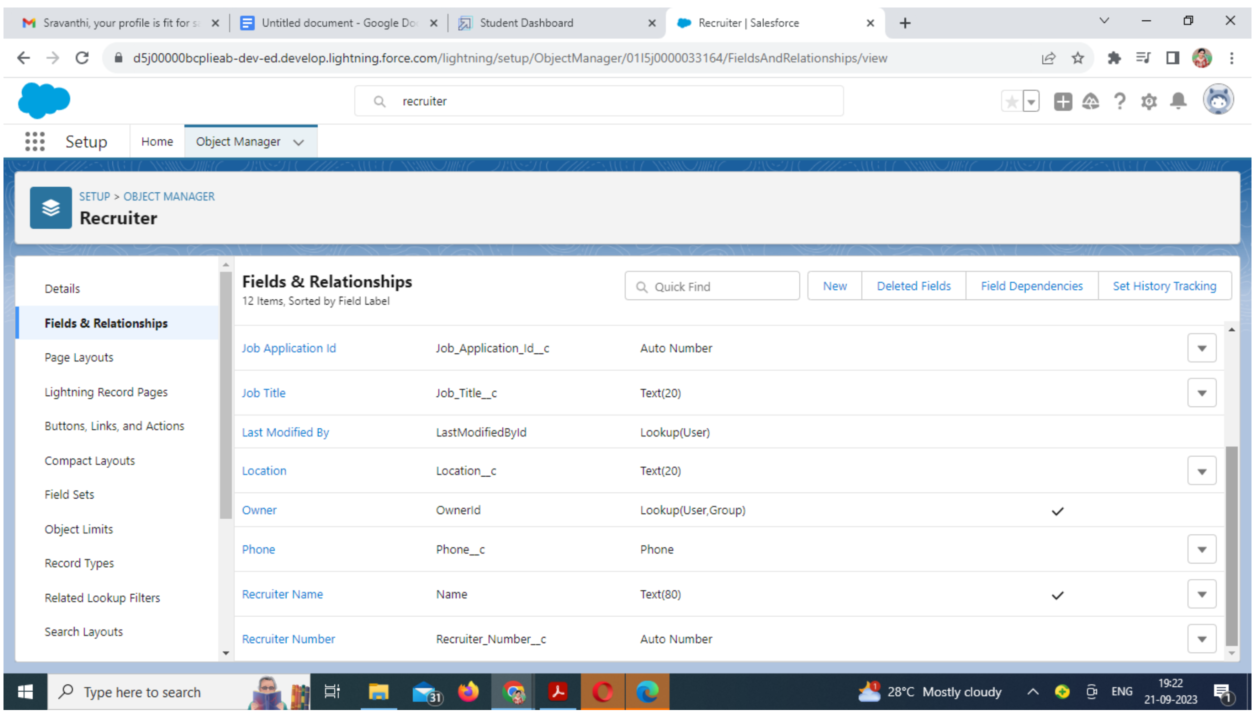
Fields in Salesforce represent what the columns represent in relational databases. It can store data values which are required for a particular object in a record.
There are 2 types of fields in salesforce:

- 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




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.

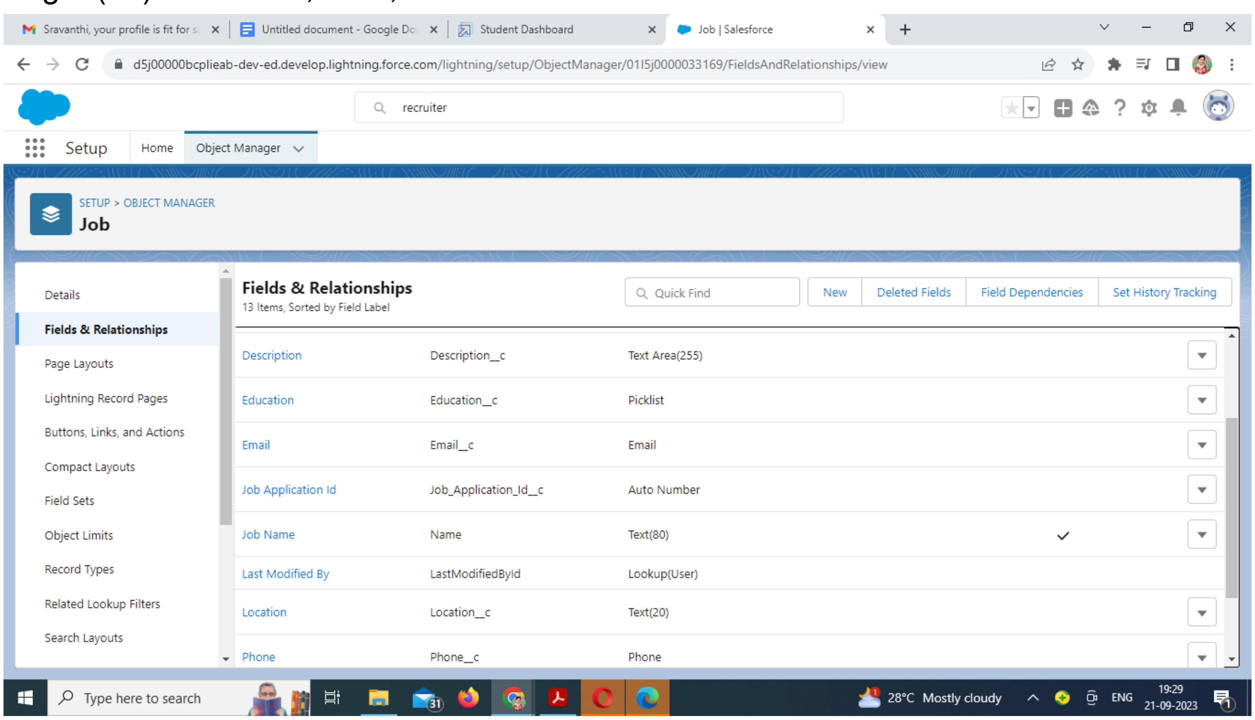
# Creation Of Fields For The Job Objects

**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

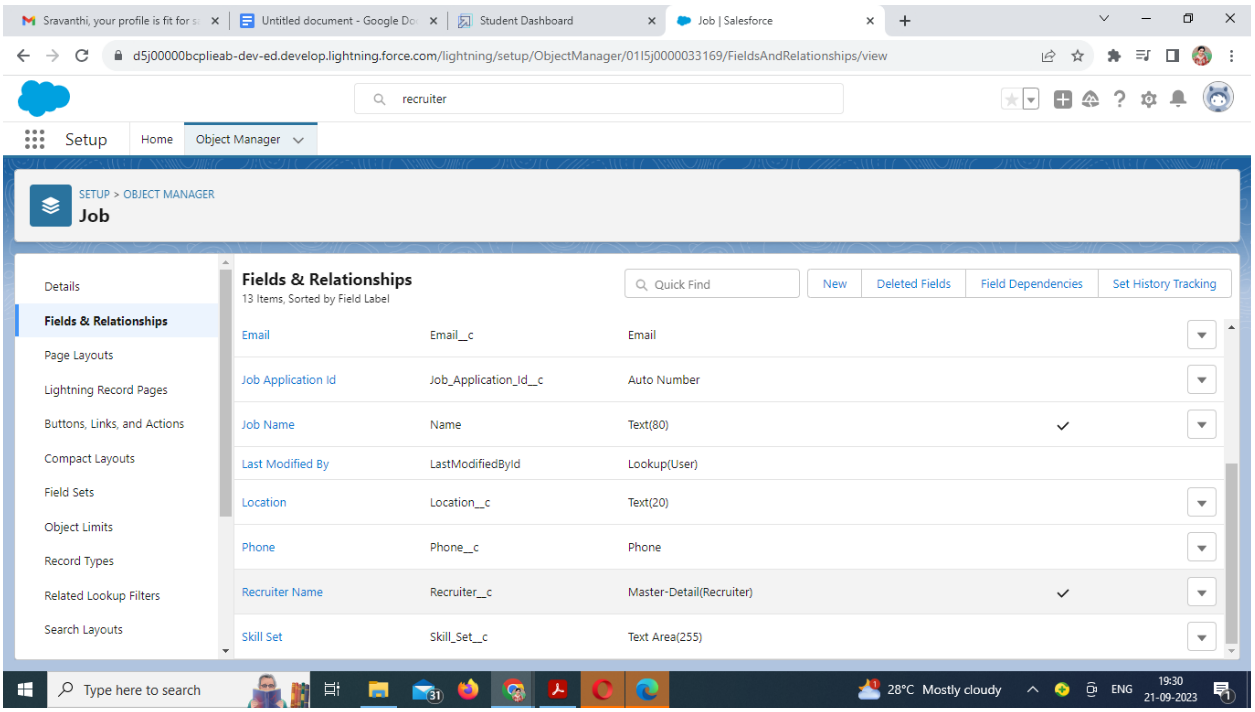
2.Select the Text area as the Data Type, then click Next. For Field Label, Description.
Click Next, Next, then Save & New.

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



# 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.




4.Choose Master-detail Relationship and click Next

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

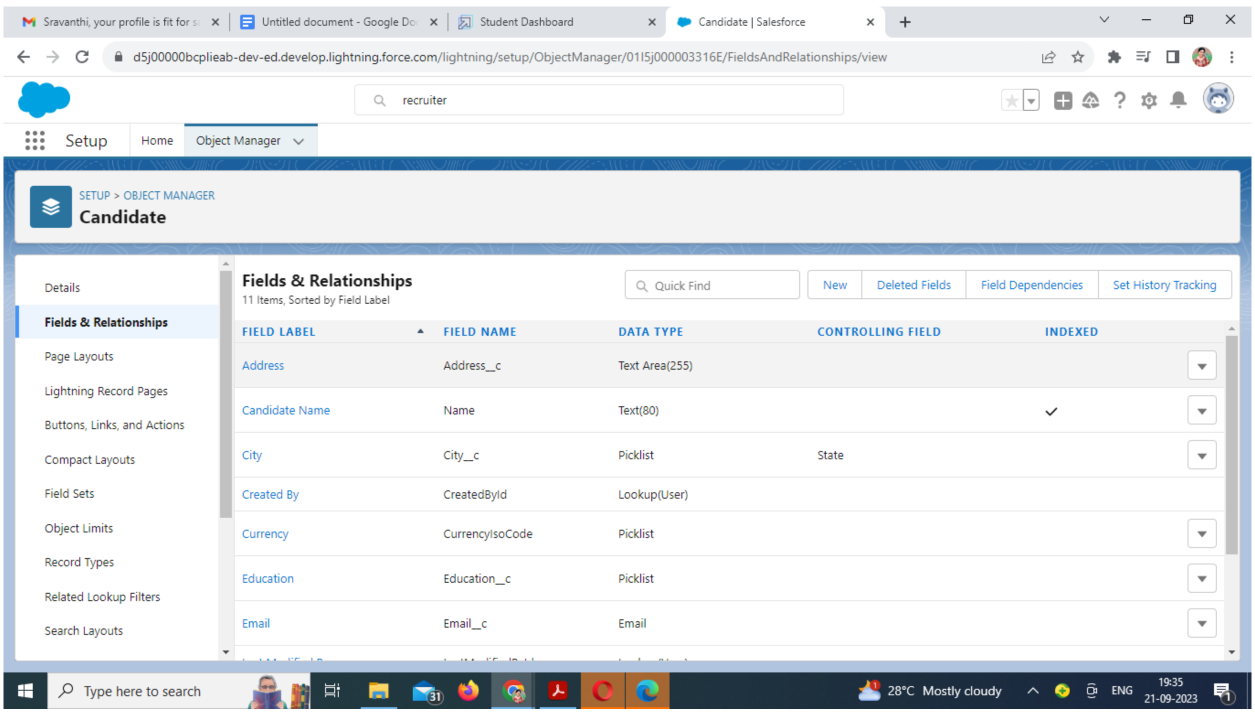
6.Enter the label name(Recruiter Name)

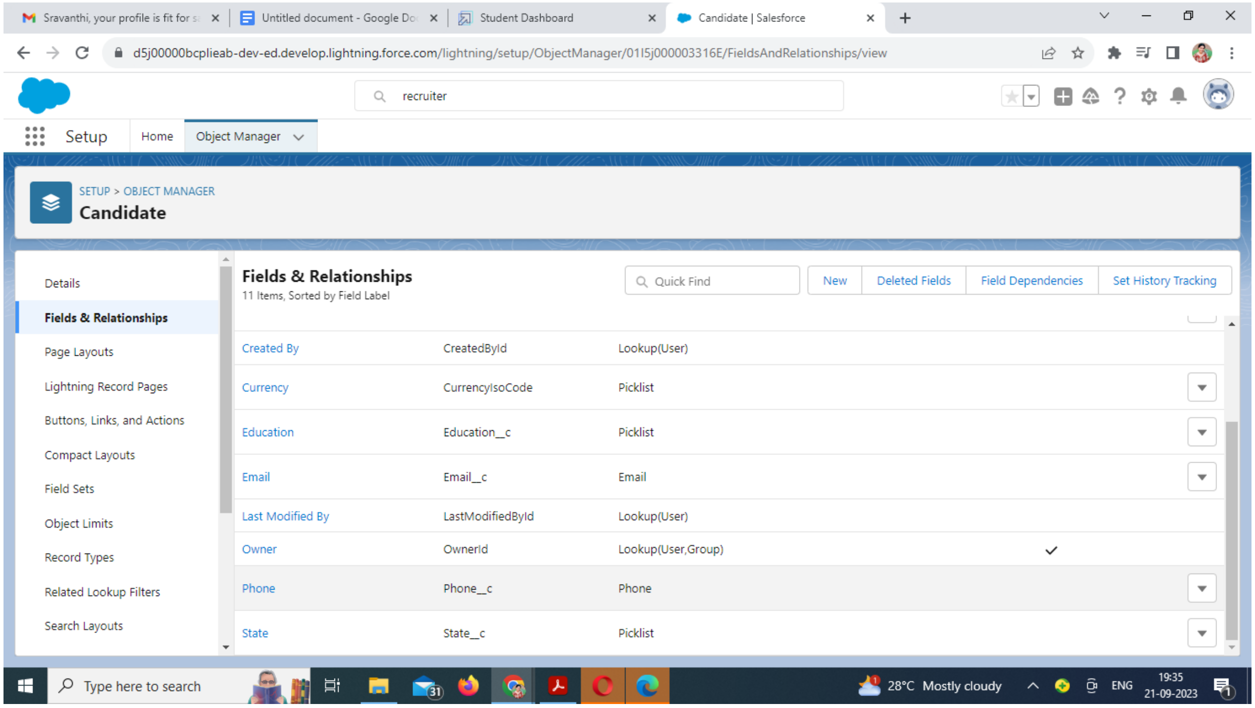
7.Click Next, Next, and Save

# 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

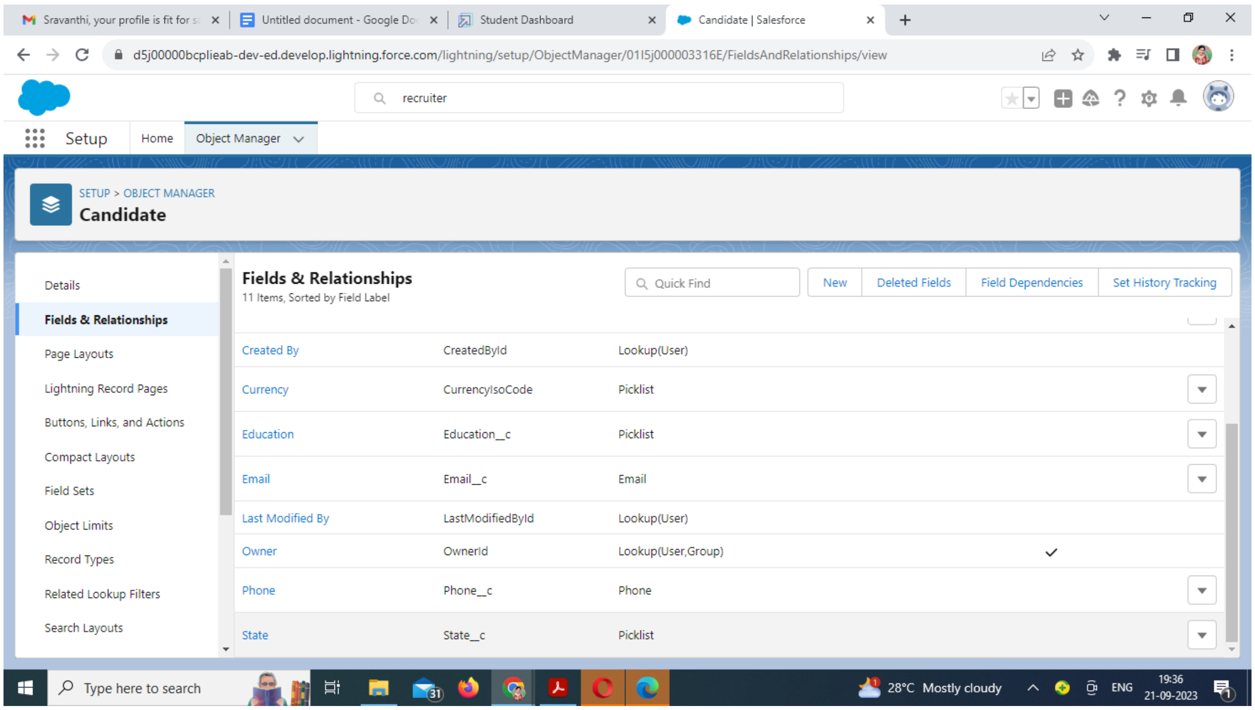





# Create Picklist Fields On Candidate Object

- 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.




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.

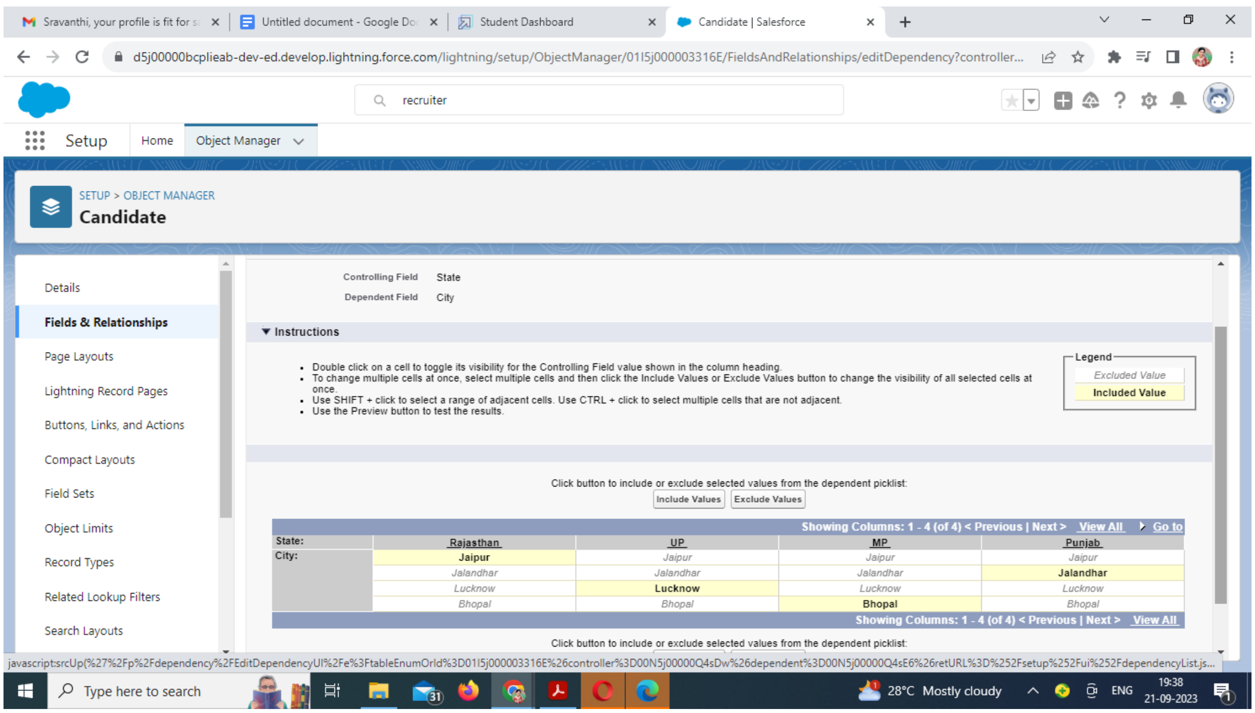
Select Enter values, with each value separated by a new line and enter these values: Graduation , Post-Graduation. Click Next, Next, then Save & New

# 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.




# Creation Lookup Relationship For The Job Application Objects

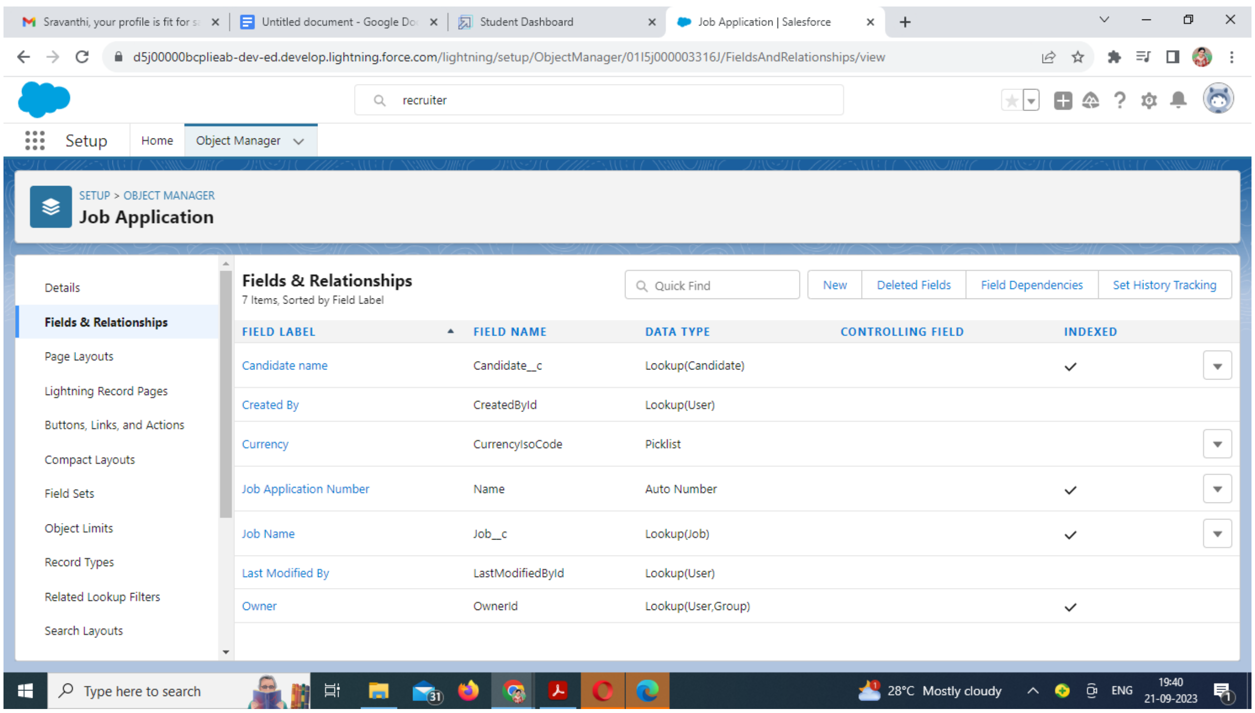
**Let's create two lookup relationship on job application object First lookup relationship**

**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




# Profile

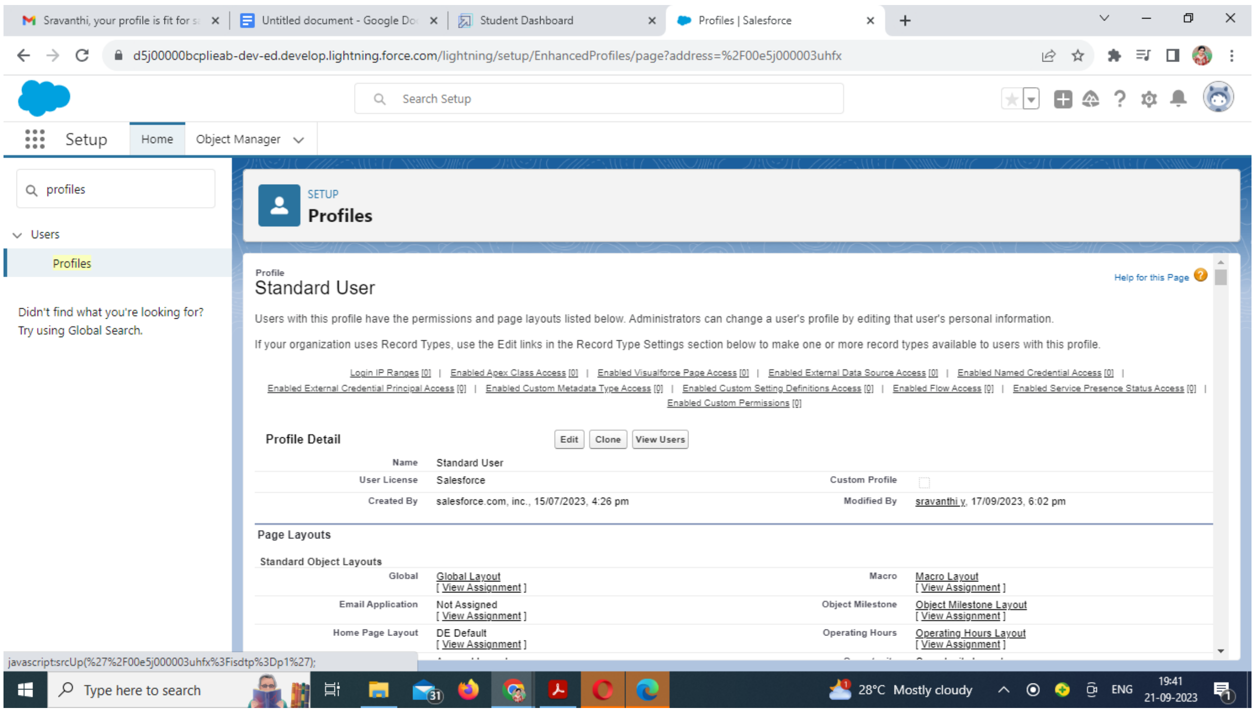
What is a profile?

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.

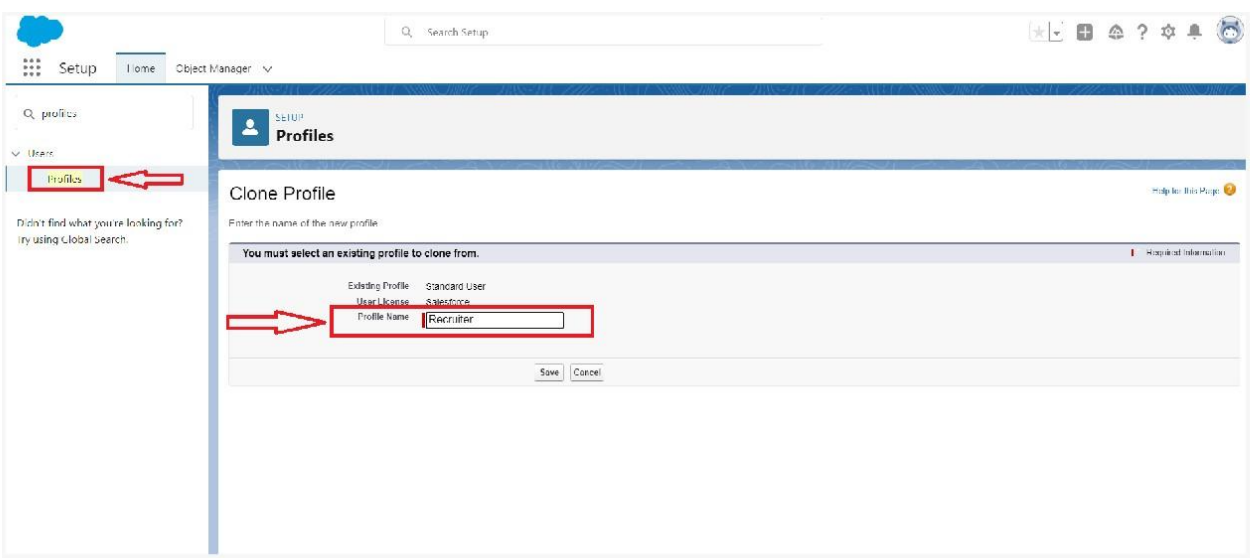
A profile can be assigned to many users, but user can be assigned single profile at a time.

# Create A Custom Profile

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




4.For Profile, enter Recruiter.



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.

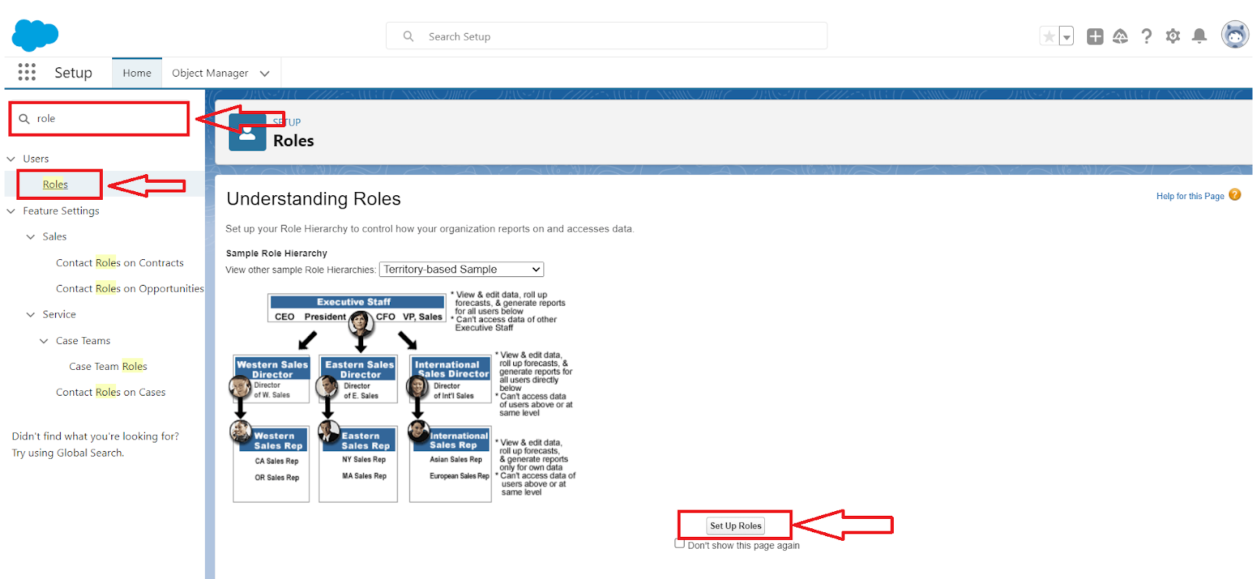
Follow the steps from above Activity

# Role

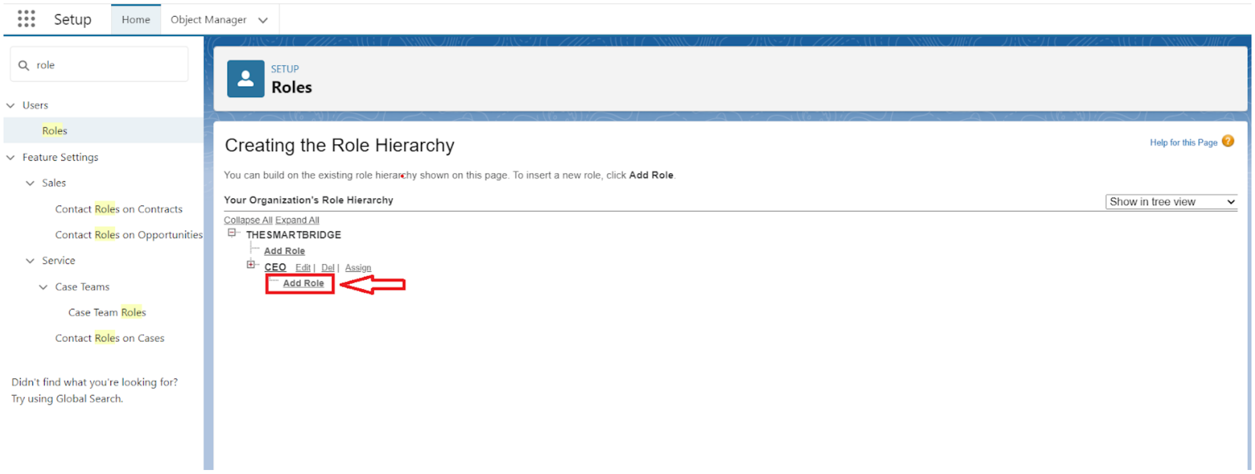
In Salesforce, roles are used to determine which users have access to certain data and functions within the system. They are also used to define the reporting hierarchy within an organization. Users with higher roles have greater access to data and more control over the system.

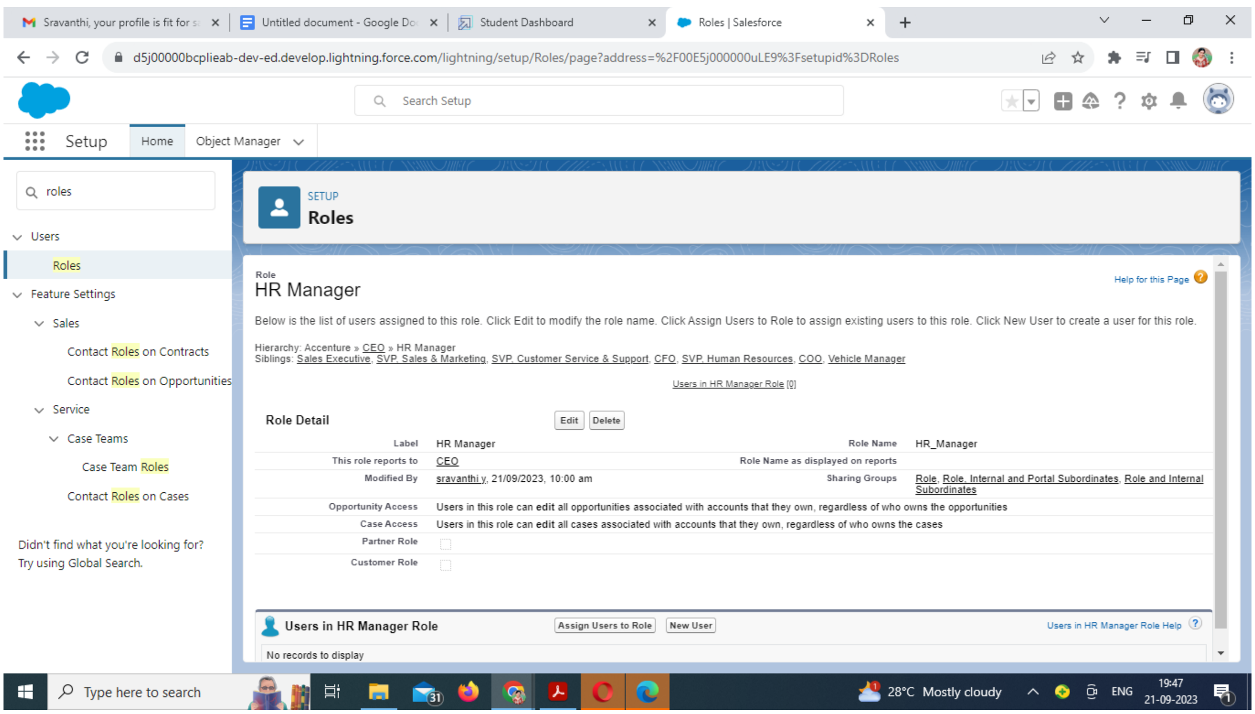
# Creation Of Role

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.



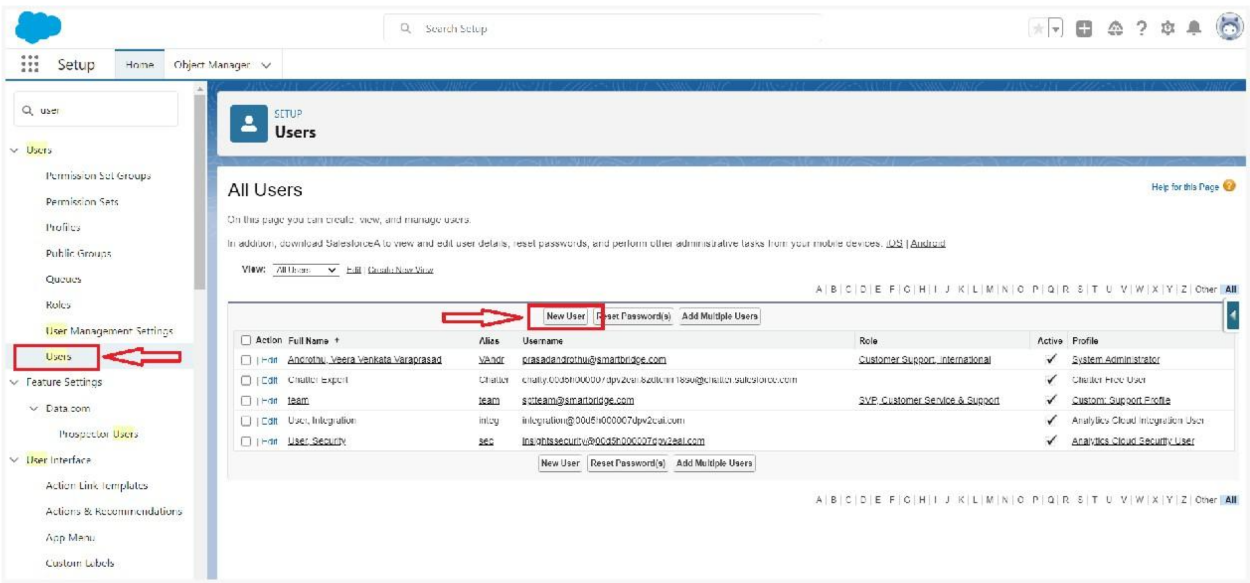

# User

### 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.

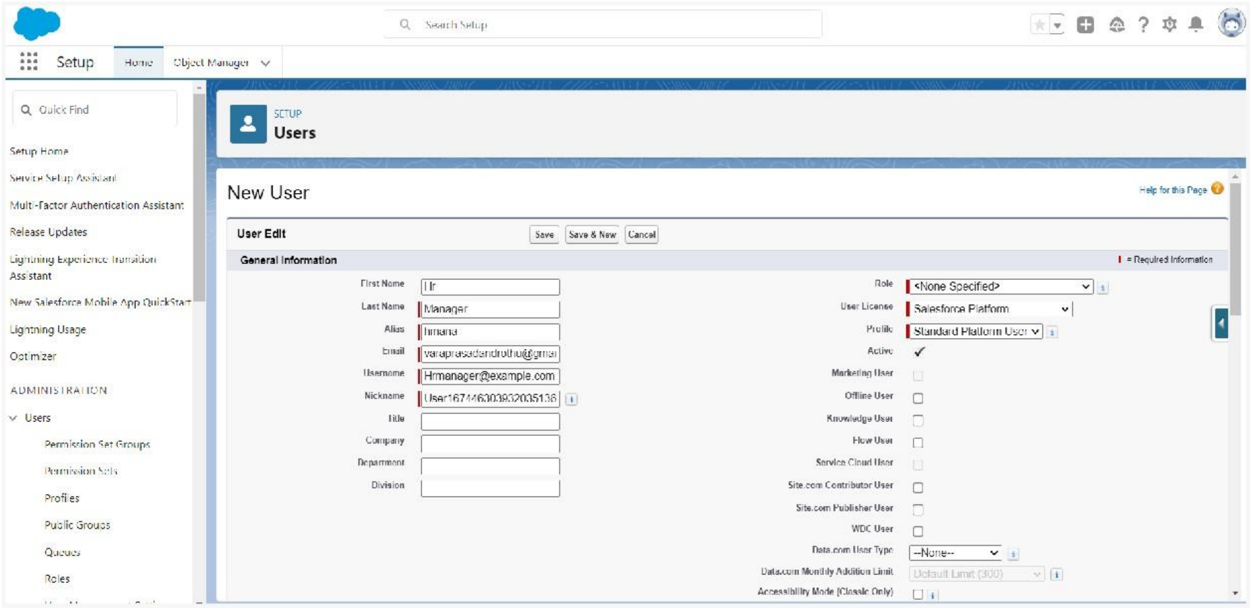
# To Create A User

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




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).


Setup
Home
Object Manager
Quick Find
Setup Home
Multi-Factor Authentication Assistant
Release Updates
Lightning Usage
Optimizer
ADMINISTRATION
Users
Permission Set Groups
Profiles
Public Groups
Queues
Roles
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Last Name
Manager
Alias
Email
Username
Hrmanager@example.com
Nickname
Title
Company
Department
Division
Role
<None Specified>
User License
Salesforce Platform
Profile
Active
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
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?

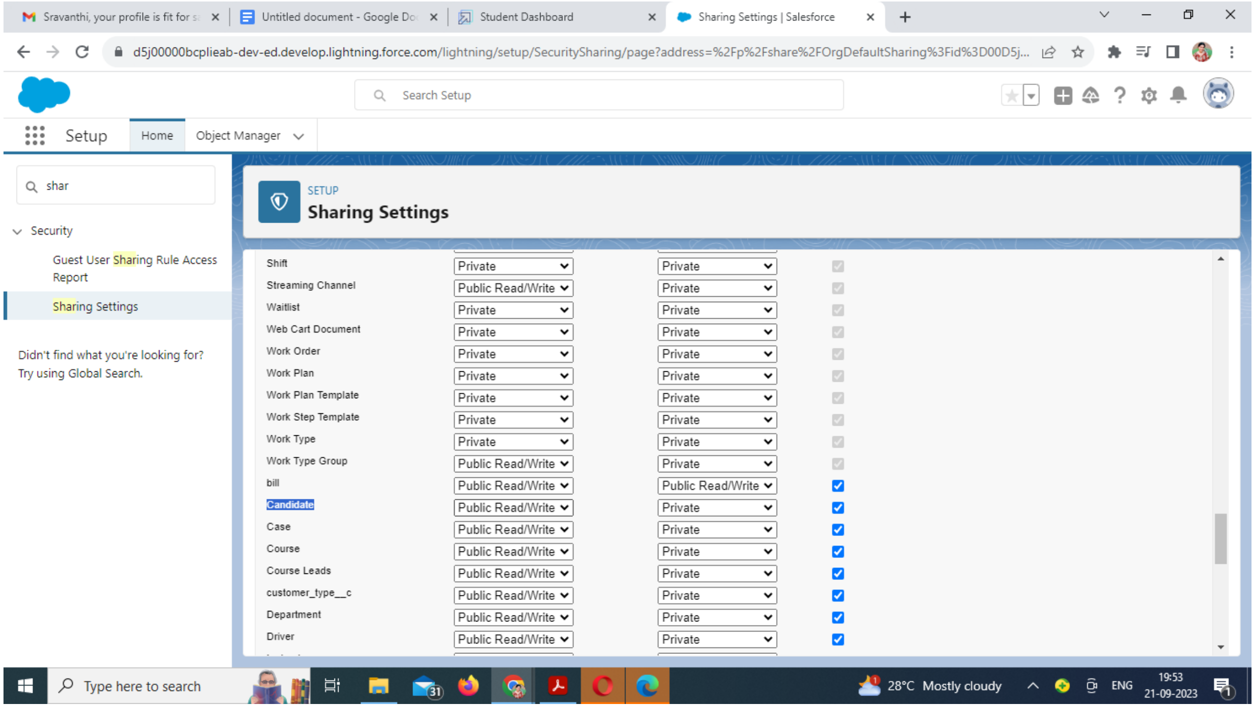
Sharing rules help users to share records based on conditions. It is basically created for objects whose organization-wide defaults (OWD) are set to public read-only or private because sharing rules can only extend the access and not restrict it.

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.


Sravanthi, your profile is fit for s
Untitled document - Google Do
Student Dashboard
Sharing Settings | Salesforce
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Search Setup
Setup
Home
Object Manager
shar
Security
Guest User Sharing Rule Access Report
Sharing Settings
Didn't find what you're looking for? Try using Global Search.
SETUP
Sharing Settings
Shift Private Private
Streaming Channel Public Read/Write Private
Waitlist Private Private
Web Cart Document Private Private
Work Order Private Private
Work Plan Private Private
Work Plan Template Private Private
Work Step Template Private Private
Work Type Private Private
Work Type Group Public Read/Write Private
bill Public Read/Write Public Read/Write
Candidate Public Read/Write Private
Case Public Read/Write Private
Course Public Read/Write Private
Course Leads Public Read/Write Private
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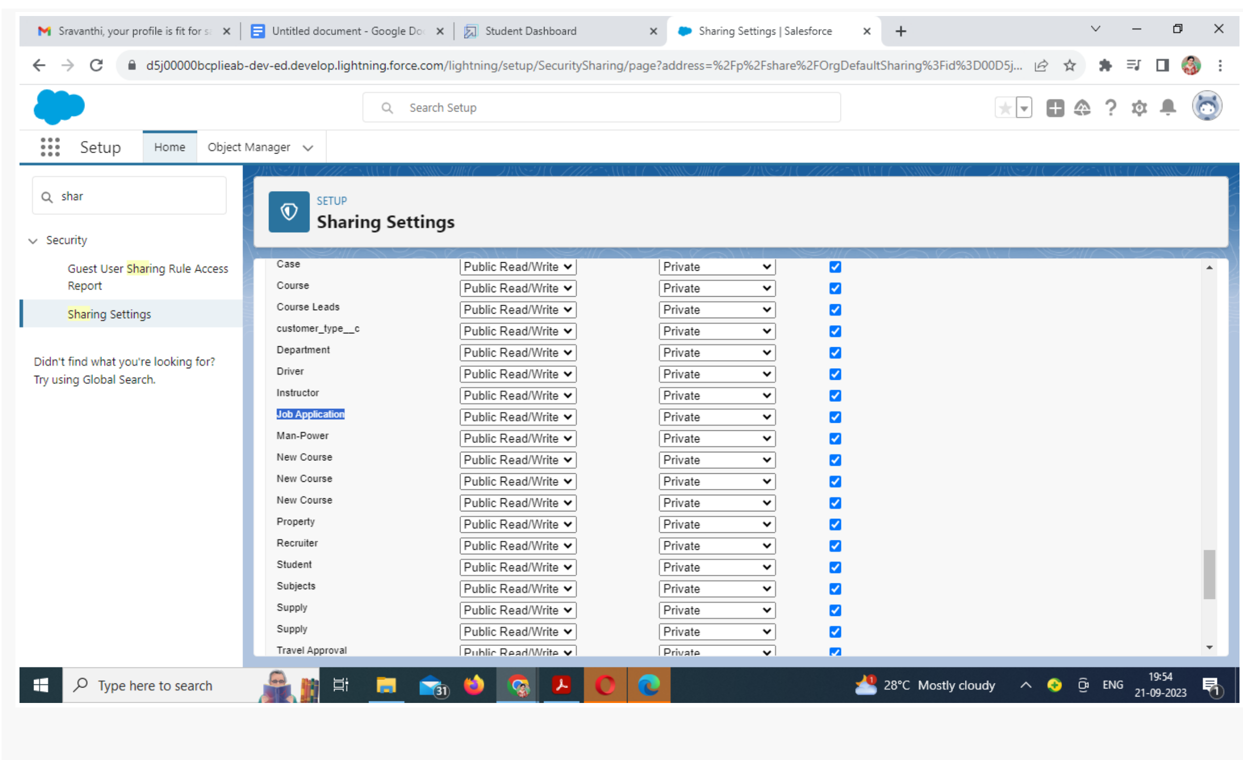
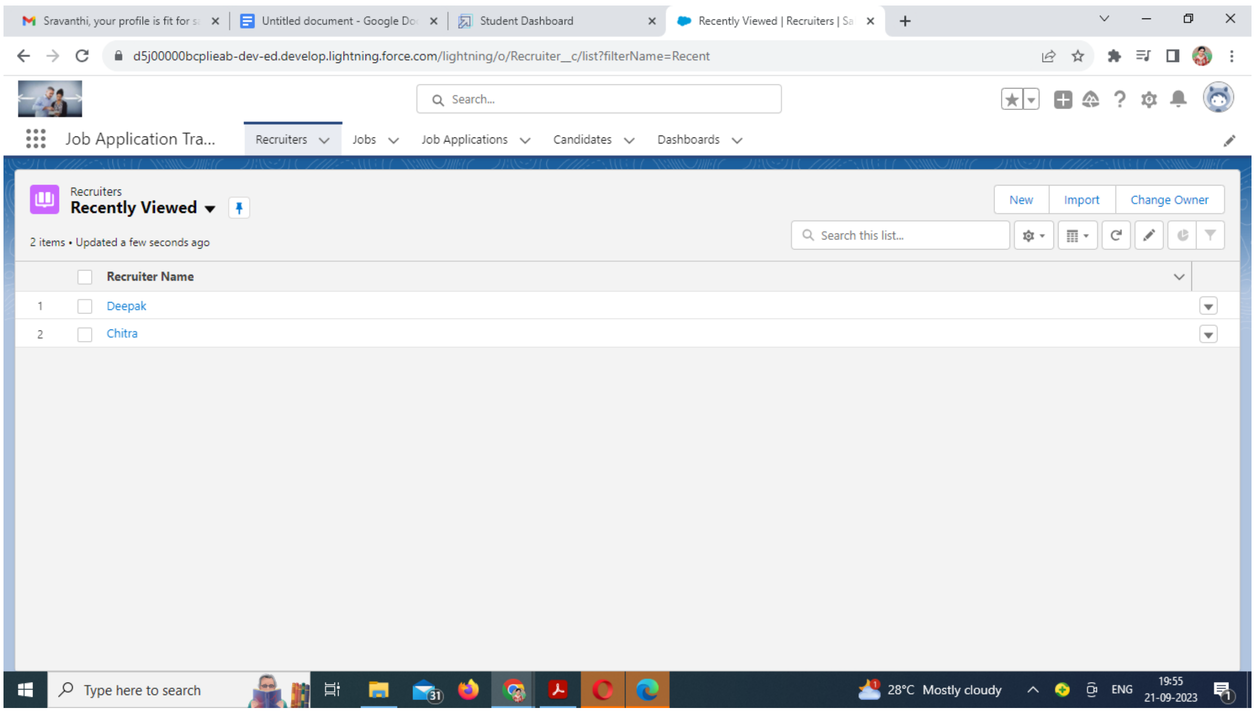

Sravanthi, your profile is fit for s
Untitled document - Google Do
Student Dashboard
Sharing Settings | Salesforce
d5j00000bcplieab-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fp%2Fshare%2FOrgDefaultSharing%3Fid%3D00D5j...
Search Setup
Setup
Home
Object Manager
shar
Security
Guest User Sharing Rule Access Report
Sharing Settings
Didn't find what you're looking for? Try using Global Search.
SETUP
Sharing Settings
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
Type here to search
28°C Mostly cloudy
ENG
19:54
21-09-2023

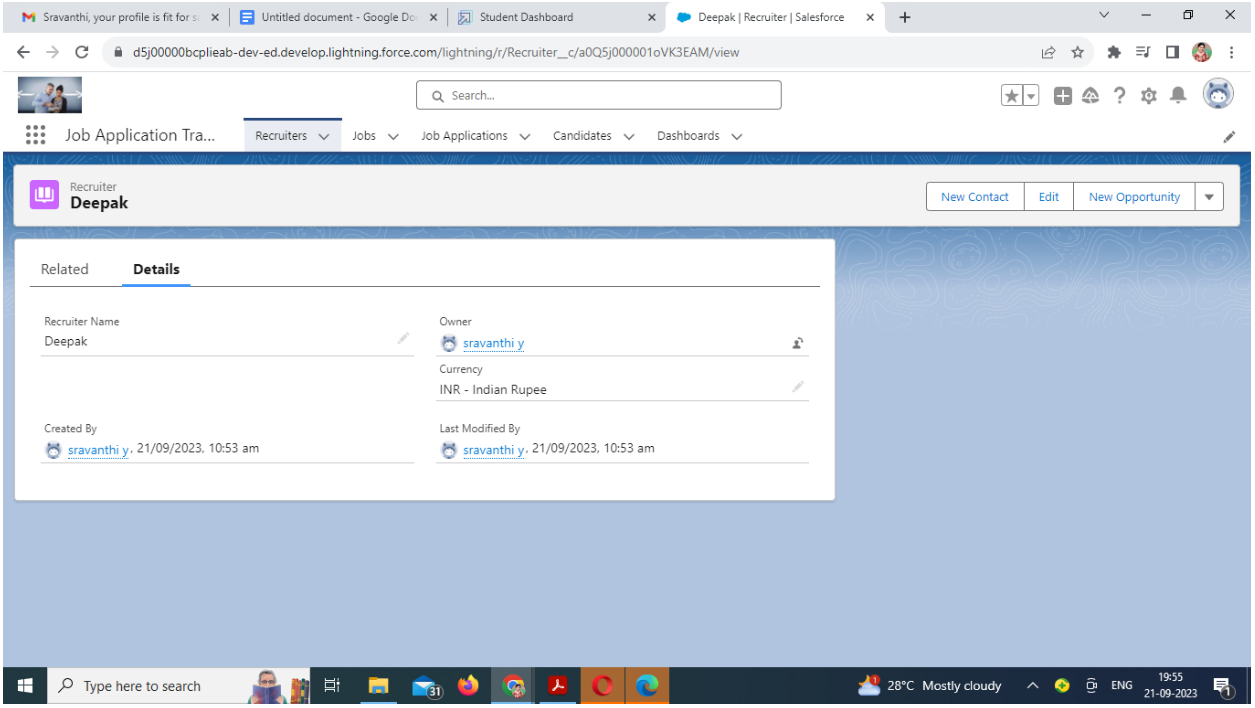
# Create A Record(Recruiter)

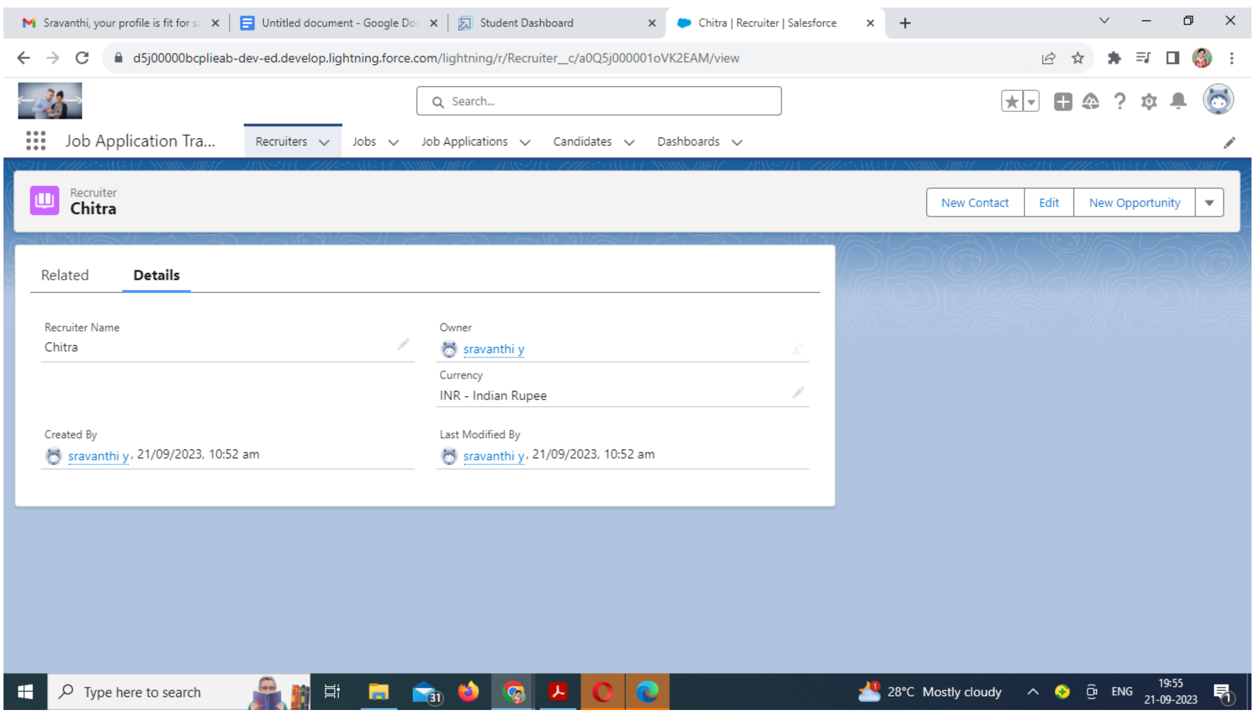
- Click on App Launcher on left side of screen.
- Search Job Application Tracking & click on it.
- Click on Recruiter Tab.
- Click new and fill details & Save




# View A Record(Recruiter)

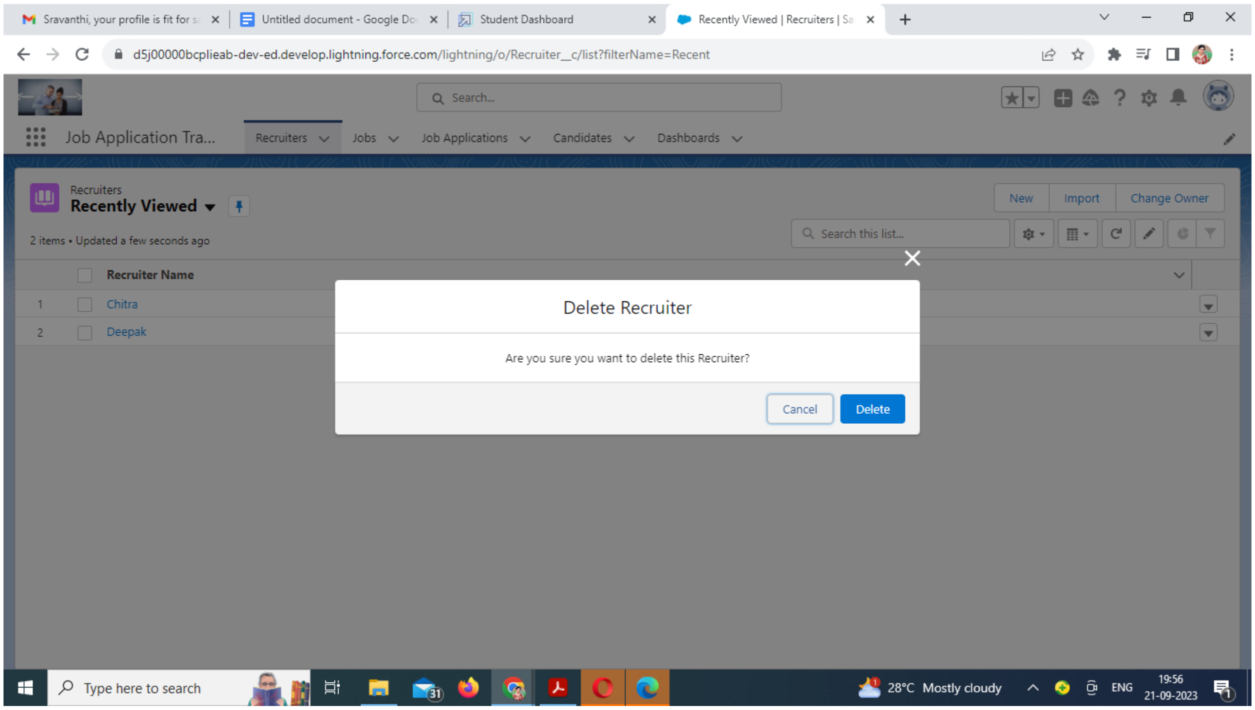
- Click on App Launcher on left side of screen.
- Search Job Application Tracking & click on it.
- Click on Recruiter Tab.
- Click on any record name. you can see the details of the Event.




# 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.



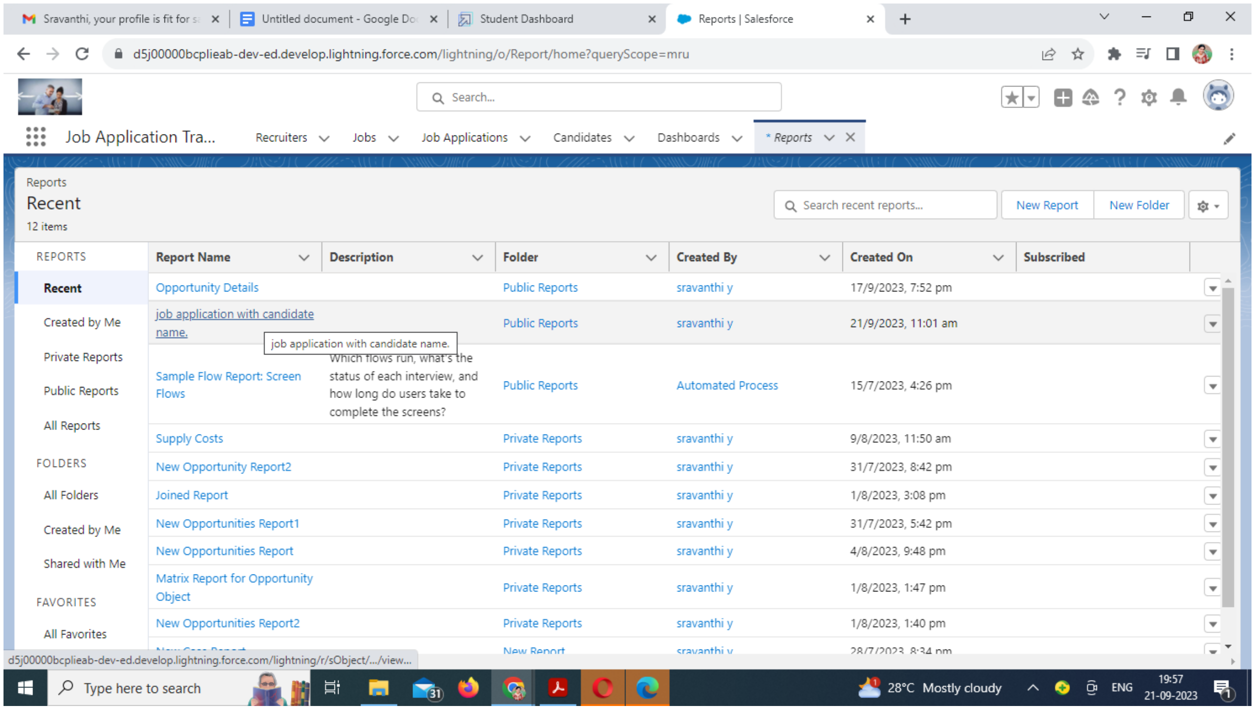

# Reports

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.

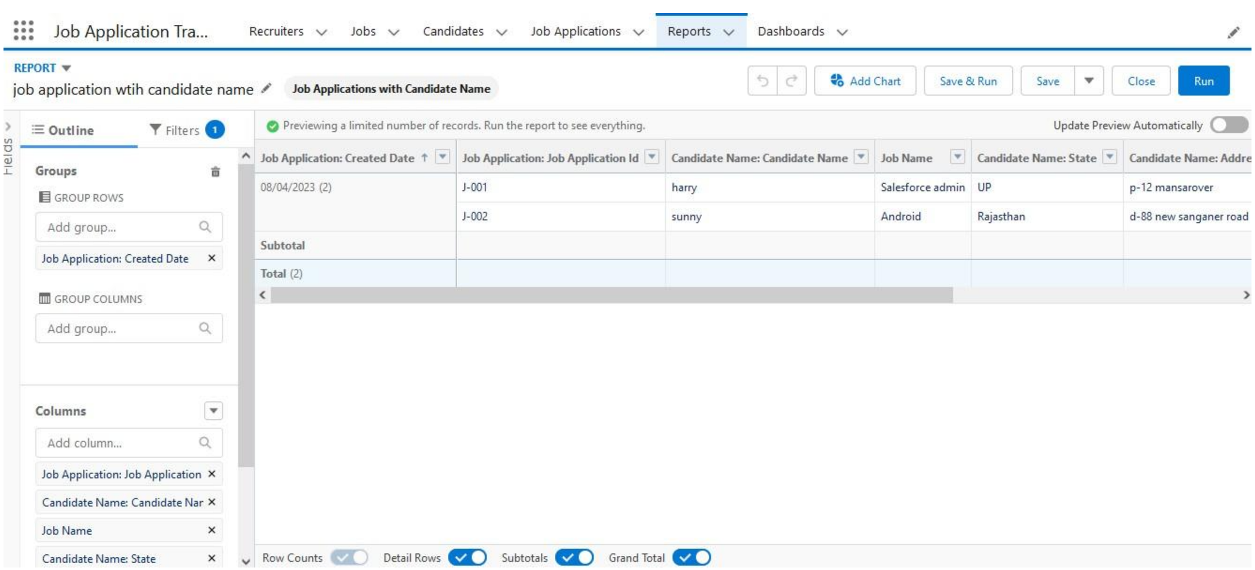
# Create A Report

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.



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.



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

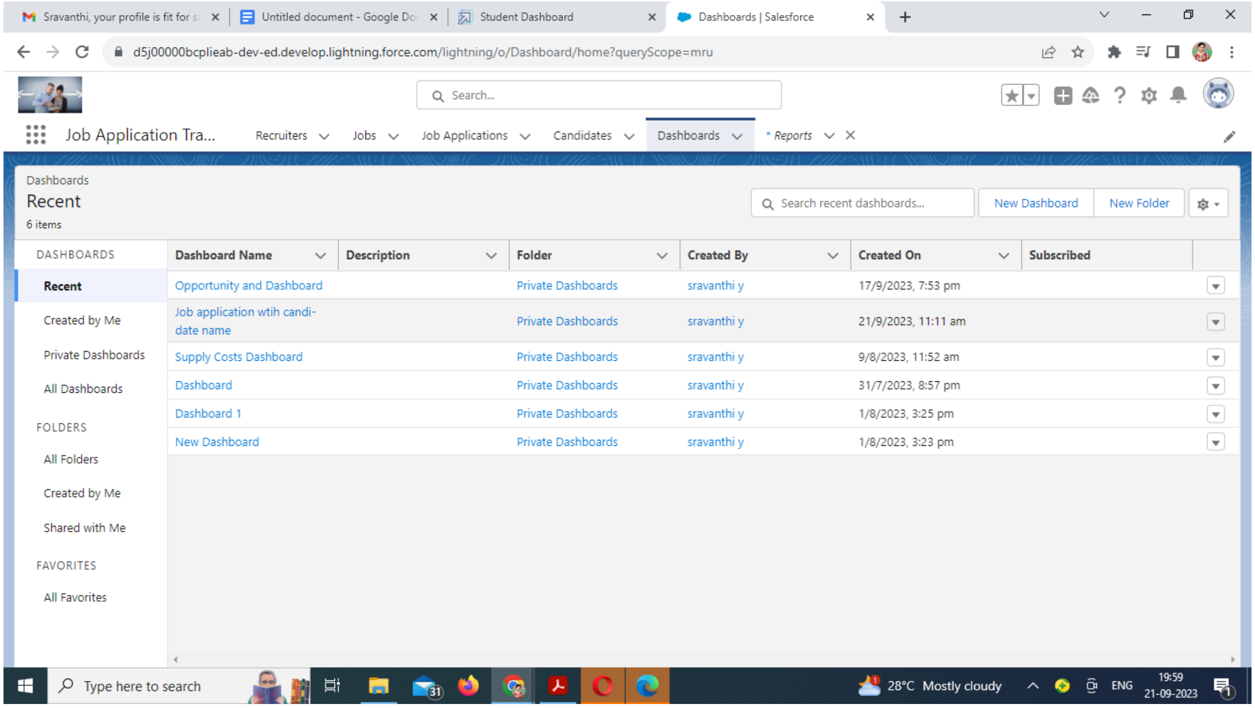
Create a Report using the Objects Jobs, Candidate and Job Application. Follow the steps from above Activity.

## 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.


Sravanthi, your profile is fit for s
Untitled document - Google Do
Student Dashboard
Dashboards | Salesforce
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Search...
Job Application Tra...
Recruiters
Jobs
Job Applications
Candidates
Dashboards
* Reports
Dashboards
Recent
6 items
Search recent dashboards...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Dashboard Name
Description
Folder
Created By
Created On
Subscribed
Opportunity and Dashboard
Private Dashboards
sravanthi y
17/9/2023, 7:53 pm
Job application wtih candi-date name
Private Dashboards
sravanthi y
21/9/2023, 11:11 am
Supply Costs Dashboard
Private Dashboards
sravanthi y
9/8/2023, 11:52 am
Dashboard
Private Dashboards
sravanthi y
31/7/2023, 8:57 pm
Dashboard 1
Private Dashboards
sravanthi y
1/8/2023, 3:25 pm
New Dashboard
Private Dashboards
sravanthi y
1/8/2023, 3:23 pm
Type here to search
28°C Mostly cloudy
ENG
19:59
21-09-2023

job application wtih candidate name


View Report (job application wtih candidate name)