



RECRUITING ASSISTANT FOR HR MANAGERS

Project Based Experiential Learning Program

Recruiting assistance for the HR managers

In this project, we use custom objects, relationships, page layouts to give the HR team easy access to data they need on an existing recruitment app.

To make the existing app more efficient for the HR team we create custom objects and relationships to store and access the data more efficiently. We install an unmanaged package in the org to get metadata that acts as existing data in the recruitment app.

<https://trailhead.salesforce.com/content/learn/projects/build-a-data-model-for-a-recruiting-app>

Milestone 1: Creation of developer account

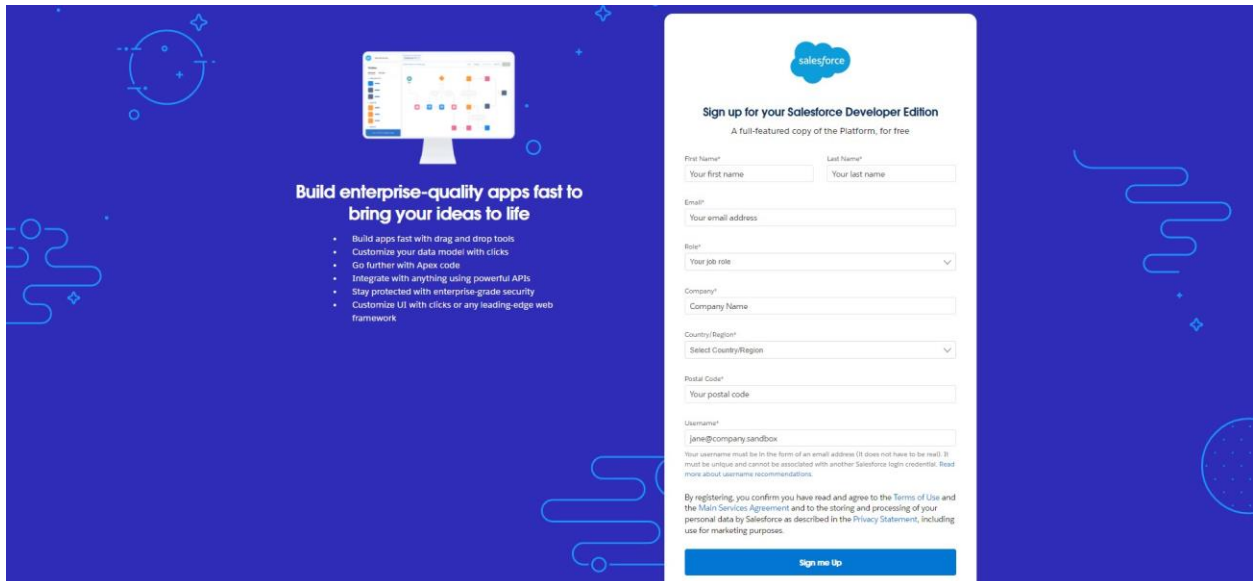
Create your Salesforce Developer Org to get Started

In order to start with this project you need to have a free salesforce developer account.

Activity-1

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

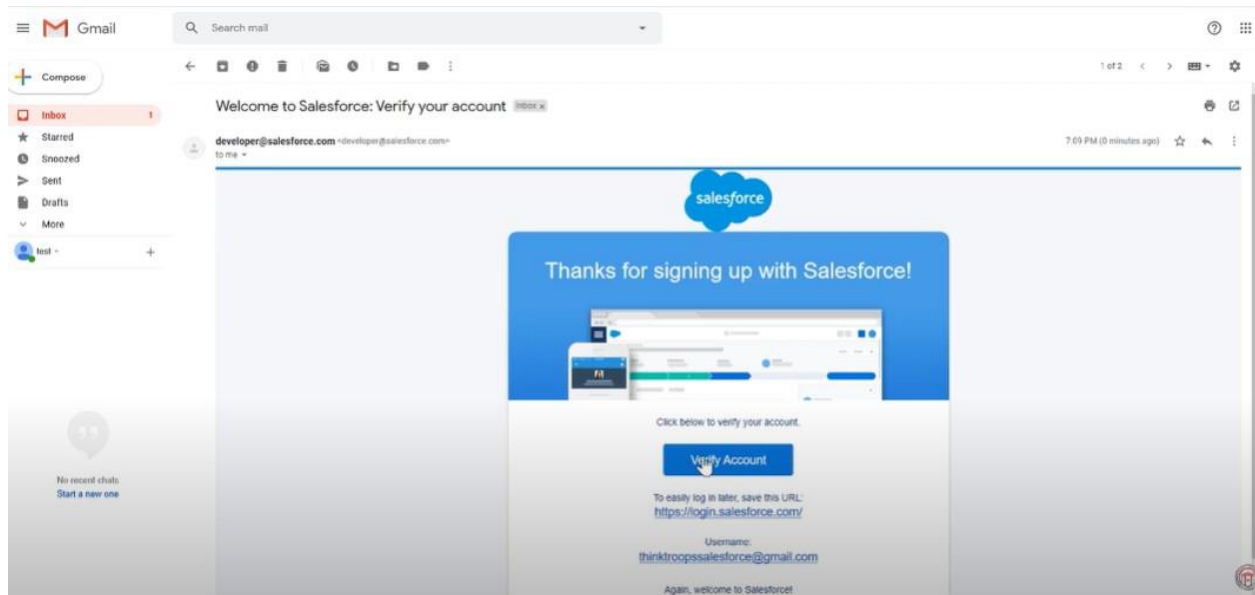
1. Search Developer.salesforce.com



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

3. Click sign me up, After a few min you will receive a mail salesforce org and by using the

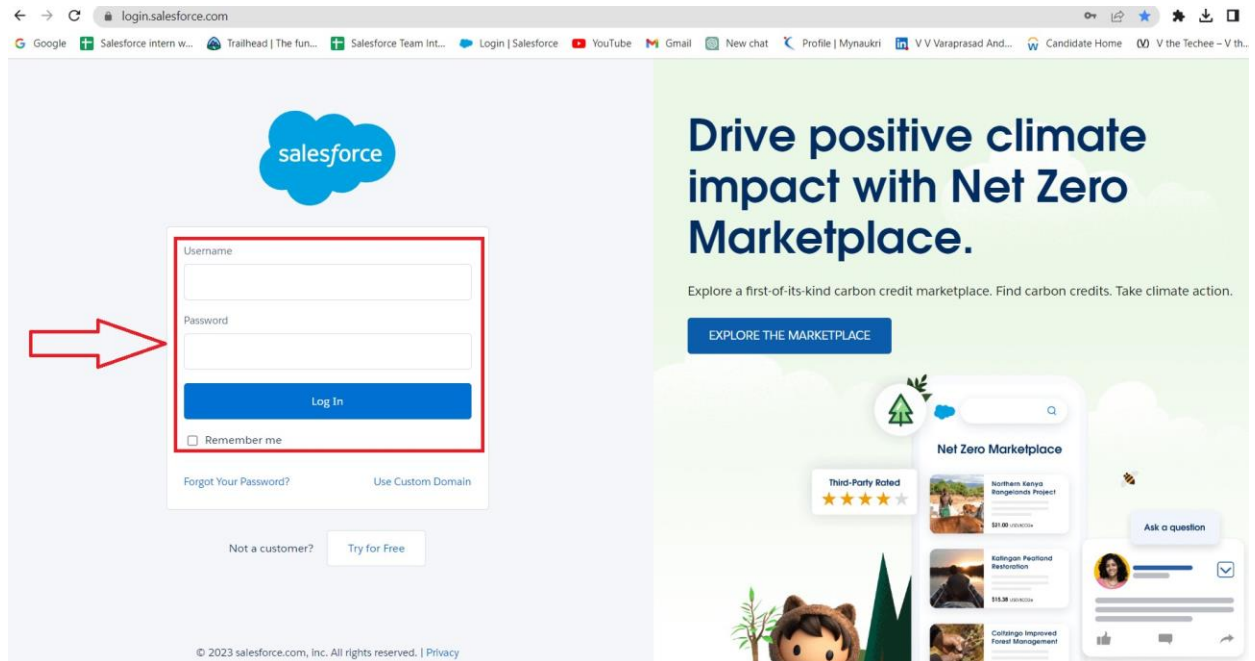
verify account link you can create your new password.



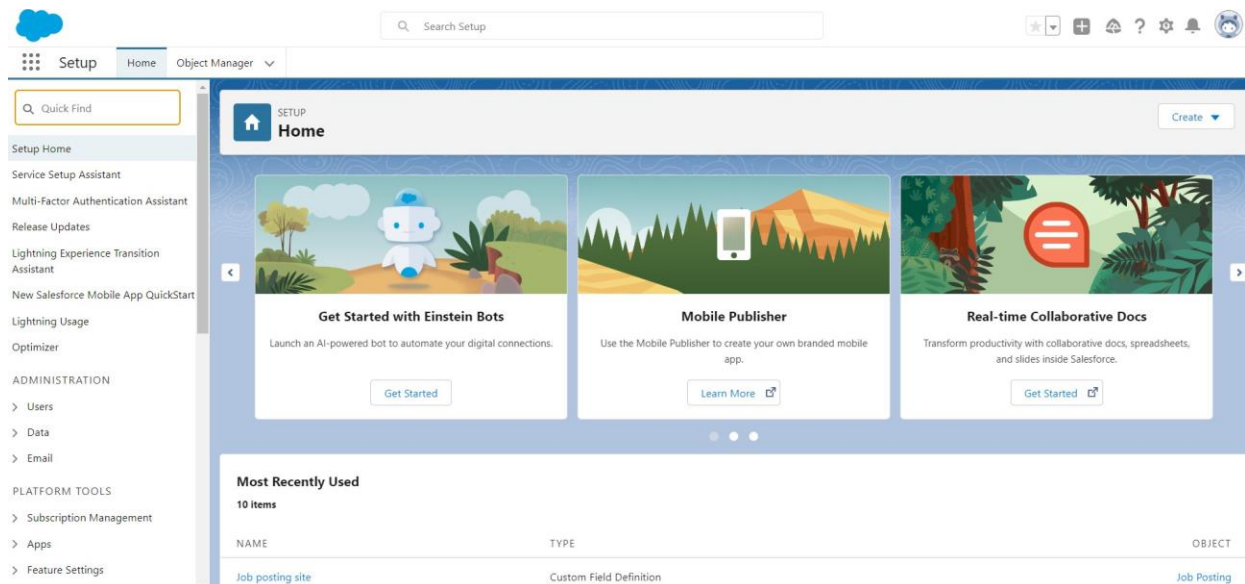
4. Click save.

5. Search login.salesforce.com

6. By using username and password you can into the salesforce org.



The setup page will appear as below.



Create a developer org and login with your login credentials.

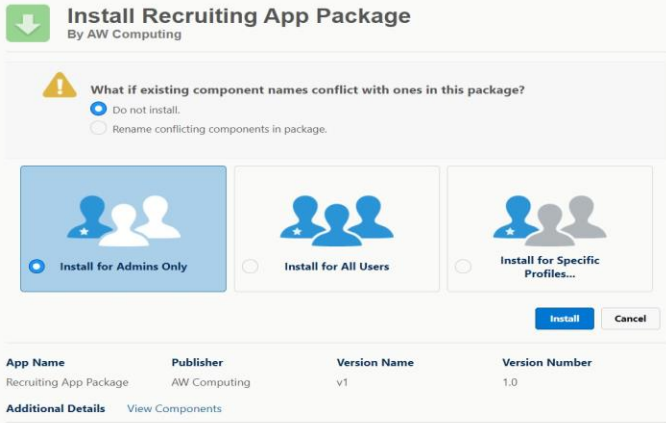
Milestone 2 : Package installation

Package installation for Recruiting App

In Salesforce, a package is a collection of Apex classes, triggers, Visualforce pages, and other components that can be installed into an organization. There are two types of packages: managed and unmanaged. Managed packages are developed and distributed by ISVs (Independent Software Vendors) and can be installed from the Salesforce AppExchange, while unmanaged packages are created and distributed by Salesforce administrators within an organization. To install a package, an administrator can navigate to the AppExchange, find the desired package, and click the "Install" button. The administrator will then be prompted to log in to their Salesforce organization and provide permission to install the package.

click  to launch the App Launcher, then click **Playground Starter** and follow the steps

1. Click the install a package tab.
2. Paste `04t0P00000N9rs` into the field.
3. Click install.
4. Select install for admins only,



App Name	Publisher	Version Name	Version Number
Recruiting App Package	AW Computing	v1	1.0

[Additional Details](#) [View Components](#)

Milestone 3: 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:

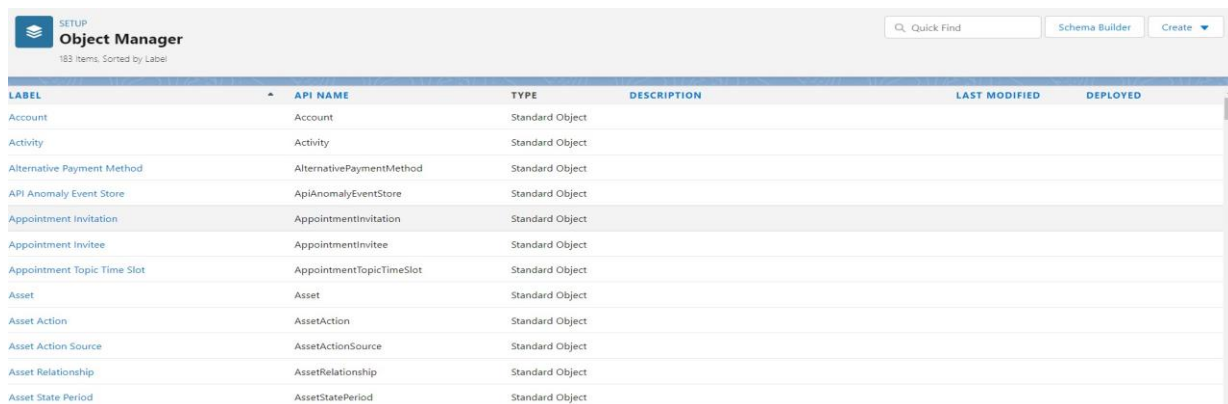
- **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

Activity-1

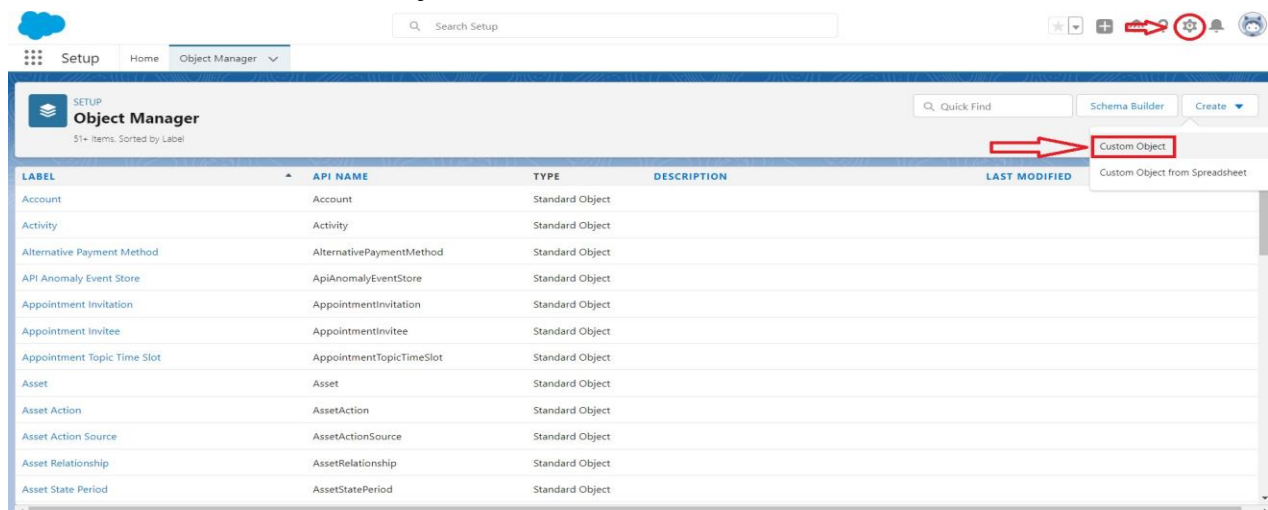
Create a custom object for Job Posting Sites

To create a custom object, follow these steps :

1. From setup click on object manager.



2. Click create, select custom object.

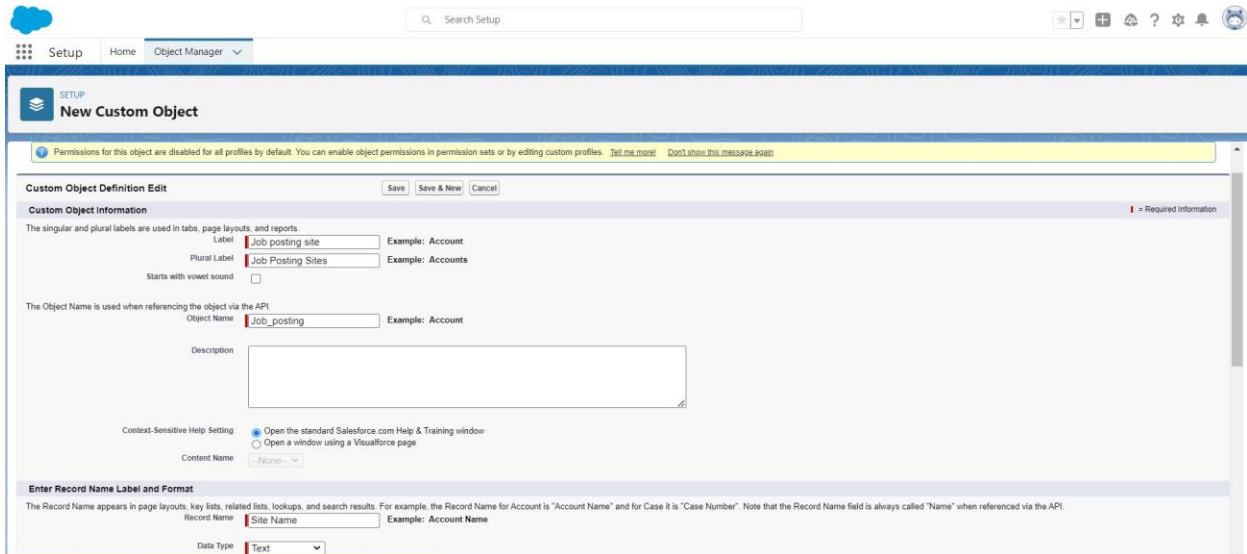


3. Fill in the label as "Job Posting Site".

4. Fill in the plural label as "Job Posting Sites".

5. Record name : "Site 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 these options:
Add Notes and Attachments related list to default page layout
Launch New Custom Tab Wizard after saving this custom object



Setup | Home | Object Manager

NEW **SETUP** **New Custom Object**

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Test me more](#) [Don't show this message again](#)

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information * Required information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Context Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

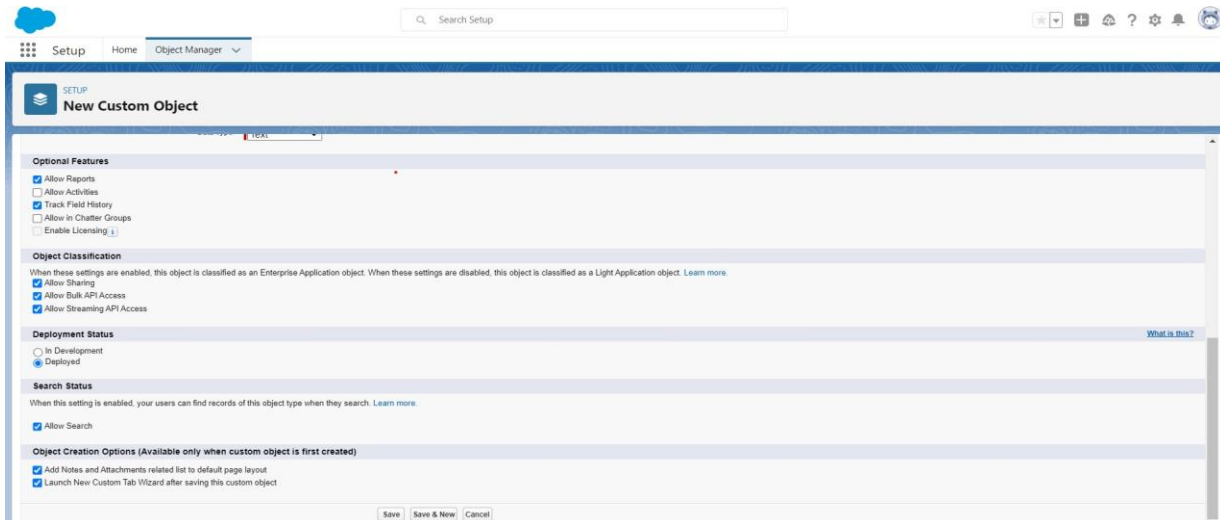
Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Example: Account Name

Data Type:



Setup | Home | Object Manager

NEW **SETUP** **New Custom Object**

Optional Features

☒ Allow Reports
☐ Allow Activities
☒ Track Field History
☐ Allow in Chatter Groups
☐ Enable Licensing [Learn more](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

☒ Allow Sharing
☒ Allow Bulk API Access
☒ Allow Streaming API Access

Deployment Status [What is this?](#)

☐ In Development
☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

☒ Allow Search

Object Creation Options (Available only when custom object is first created)

☒ Add Notes and Attachments related list to default page layout
☒ Launch New Custom Tab Wizard after saving this custom object

[Save] [Save & New] [Cancel]

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

Activity-2

Create a custom object for reviews

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 "Review".
4. Fill in the plural label as "Reviews".
5. Record name : "Review Number"
6. Select the data type as "Auto Number".
7. Under display format enter "REV-{0000}".
8. Enter the 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 4 : Tabs

What is Tab?

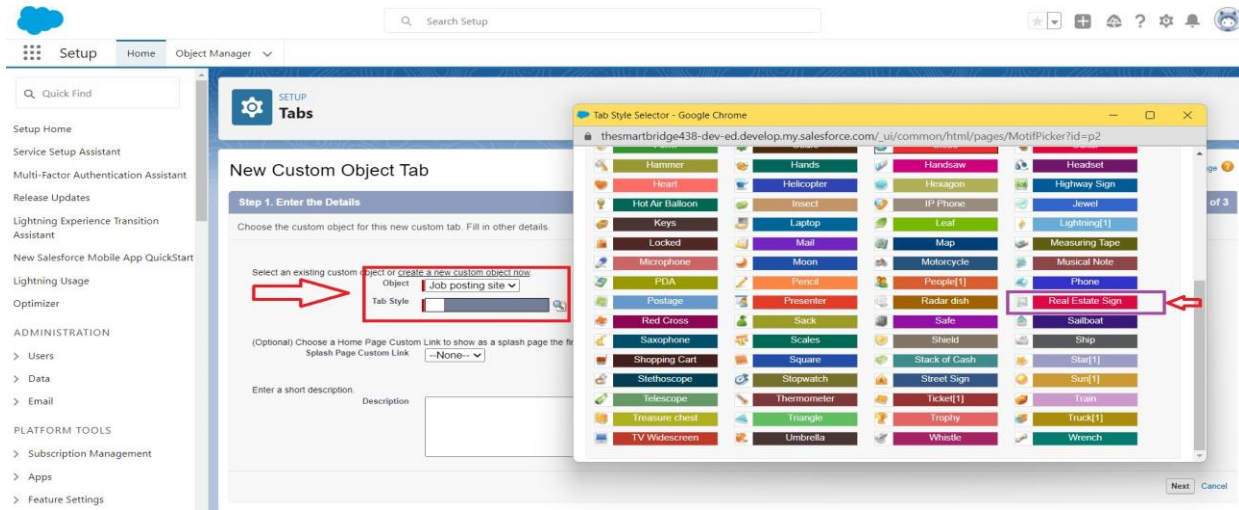
In Salesforce, a tab is a user interface element that allows users to navigate to different sections of the platform, such as Accounts, Contacts, Leads, and Opportunities. Tabs can also be used to access custom objects and custom pages. They are typically located at the top of the screen and can be customized to fit the needs of the organization.

Activity :

How to create a tab

As we selected to launch a custom tab wizard in step 10, a custom tab wizard appears wherein we customize the look of the Job posting site object's tab. To do that :

1. To Select the Tab Style: Click the magnifying glass and select Real Estate



2. Click Next.
3. Leave the profile as is and click Next.
4. In the Add to Custom Apps section:
5. Deselect Include Tab.
6. Select Append tab to users' existing personal customizations.
7. Click Save.

Milestone 5 : Fields

What are 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.

There are 2 types of fields in salesforce:

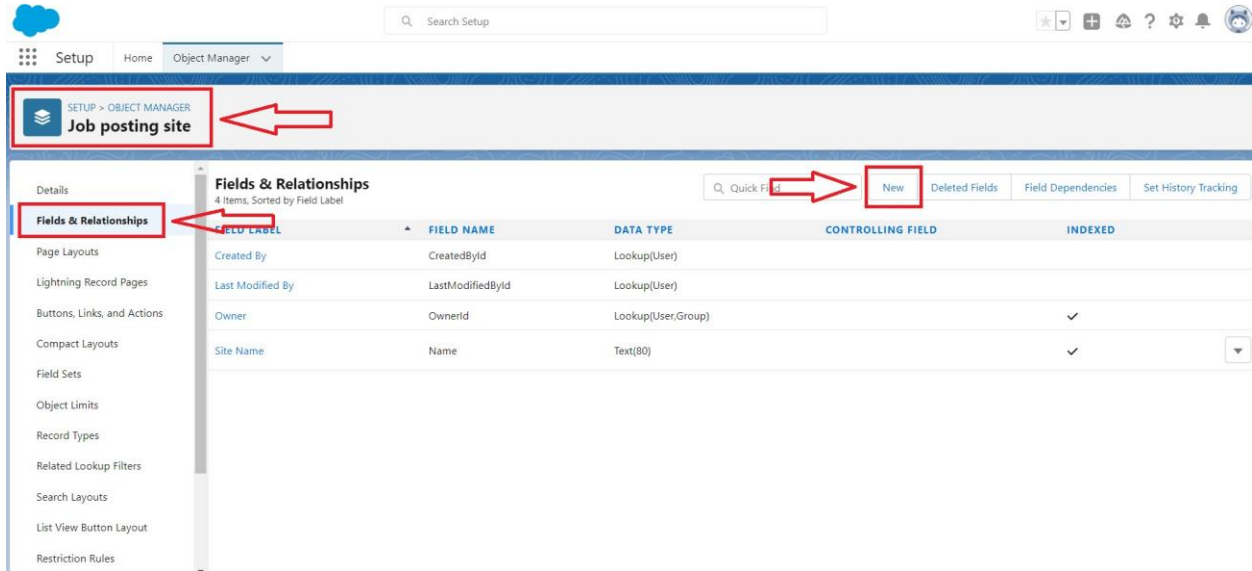
- **Standard fields:** There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are 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.

Activity-1

Create New Field for Job Posting site

From the object manager, click on the job posting site, then click on Fields & Relationships.

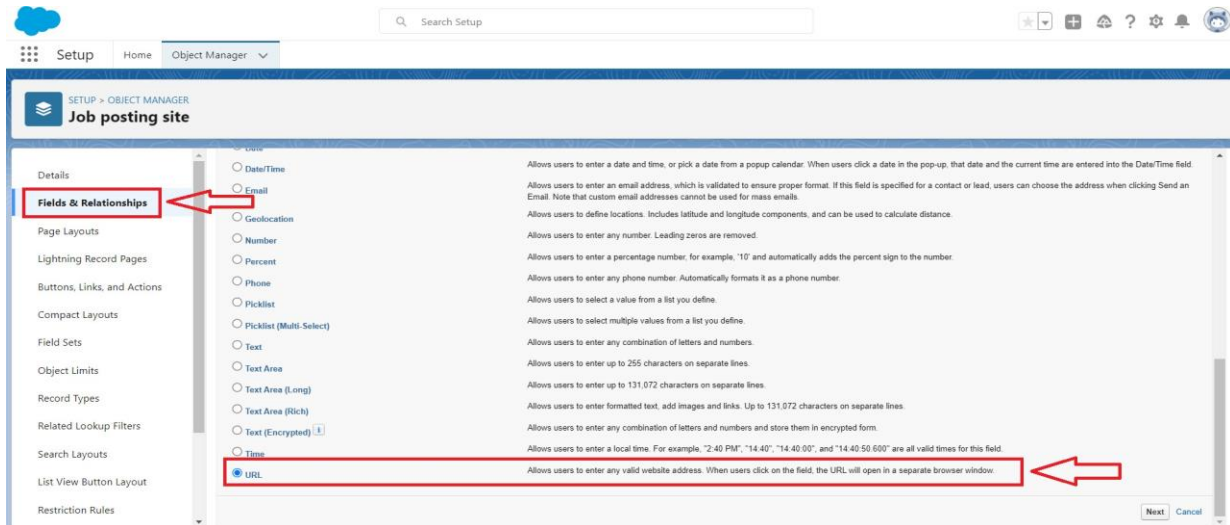
1. Click on new.



The screenshot shows the Salesforce Setup interface. The breadcrumb trail is 'Setup > OBJECT MANAGER > Job posting site'. The 'Job posting site' object is selected. The 'Fields & Relationships' tab is active, showing a table with 4 items. The 'New' button is highlighted with a red box and an arrow.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Site Name	Name	Text(80)		✓

2. Select the data type as URL.

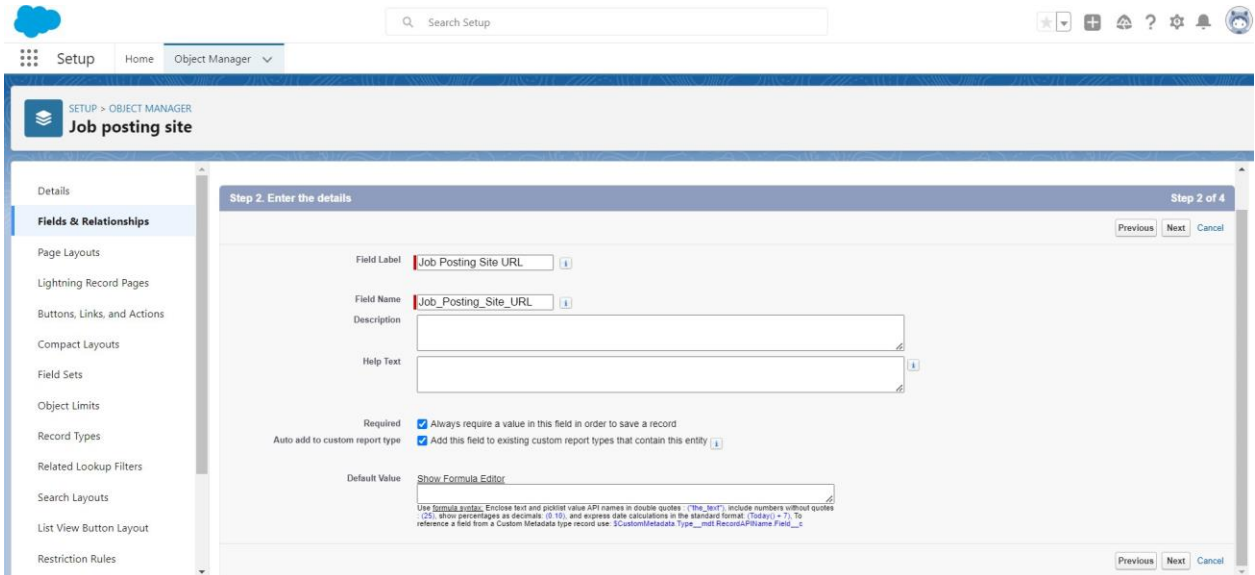


The screenshot shows the Salesforce Setup interface. The breadcrumb trail is 'Setup > OBJECT MANAGER > Job posting site'. The 'Job posting site' object is selected. The 'Fields & Relationships' tab is active, showing a list of data types. The 'URL' data type is highlighted with a red box and an arrow.

- ☐ Date/Time
- ☐ Email
- ☐ Geolocation
- ☐ Number
- ☐ Percent
- ☐ Phone
- ☐ Picklist
- ☐ Picklist (Multi-Select)
- ☐ Text
- ☐ Text Area
- ☐ Text Area (Long)
- ☐ Text Area (Rich)
- ☐ Text (Encrypted)
- ☐ Time
- ☒ URL

3. Click Next.

4. For Field Label, enter the Job Posting Site URL.



Setup > OBJECT MANAGER
Job posting site

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

Step 2. Enter the details Step 2 of 4

Field Label

Field Name

Description

Help Text

Required ☒ Always require a value in this field in order to save a record

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity

Default Value

Use formula syntax. Enclose text and picklist value API names in double quotes. ("the_text", include numbers without quotes). (%), show percentages as decimals (% 10), and express date calculations in the standard format: {Today} + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__metaRecordAPIName.Field__c

Previous Next Cancel

5. Click Next, Next, and click Save & New.

Create a Fields for Job Posting site

1. Status
2. Technical site
3. Description

Note: Follow the steps Create the left over fields

1. Status
2. Technical site
3. Description

Milestone 6 : Junction Object

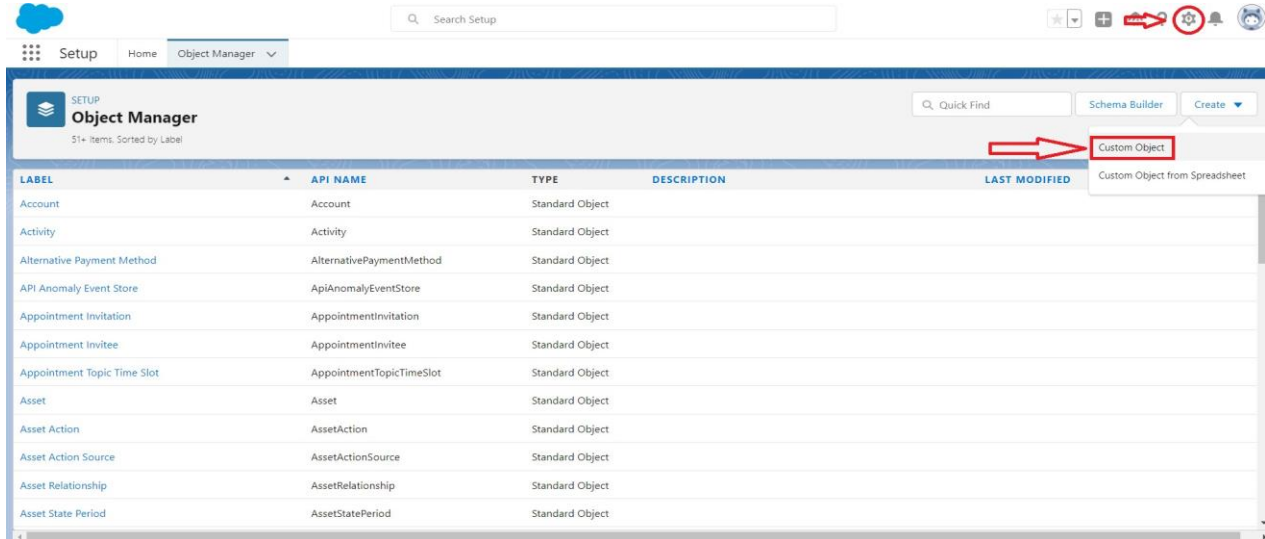
What is a Junction Object?

In Salesforce, a junction object is a custom object that is used to create a many-to-many relationship between two other objects. It connects two objects together by creating two one-to-many relationships, allowing data from both objects to be associated with each other in a single record. For example, if you have a custom object for "Projects" and another for "Teams," a junction object could be used to connect individual team members to multiple projects.

Activity

Creating a custom junction object :

1. From setup, click object Manager.
2. Click create, select custom object.



Object Manager

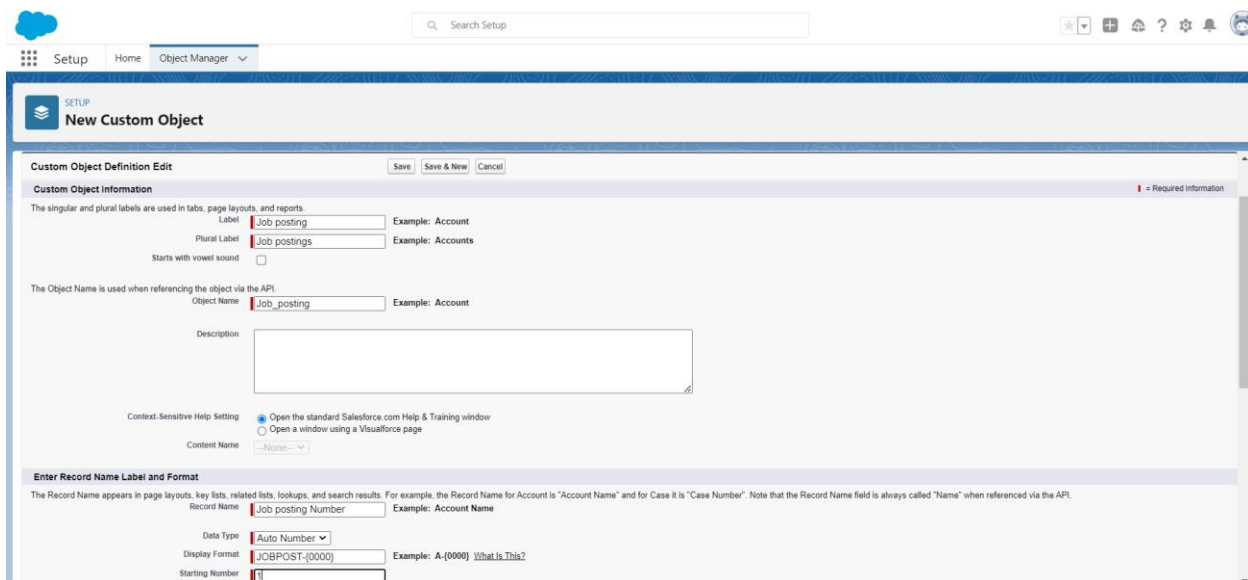
31+ Items. Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		
Asset Action Source	AssetActionSource	Standard Object		
Asset Relationship	AssetRelationship	Standard Object		
Asset State Period	AssetStatePeriod	Standard Object		

Custom Object

Custom Object from Spreadsheet

3. Enter the label as "Job posting".
4. Enter the plural label as "Job postings".
5. Enter the record name as "Job posting number".
6. select the data type as "Auto Number".
7. Enter the display format as "JOBPOST-{0000}"
8. Enter the Starting number as 1.



Setup

Search Setup

Object Manager

Setup

Quick Find

Schema Builder

Create

Custom Object

Custom Object from Spreadsheet

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

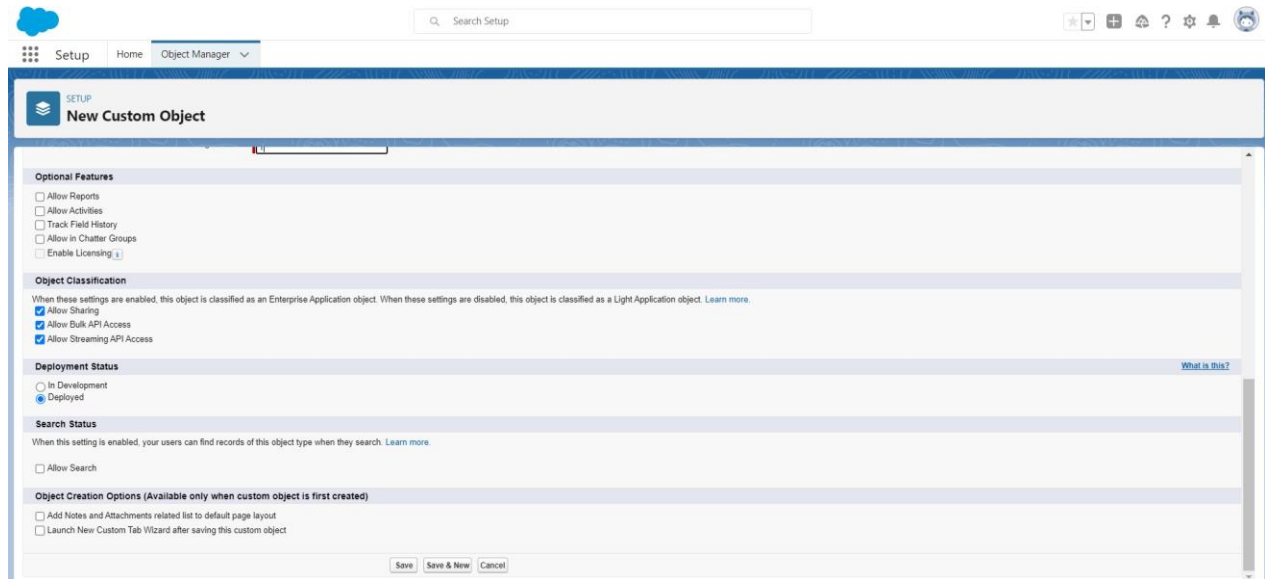
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type

Display Format Example: A (0000) What Is This?

Starting Number



The screenshot shows the 'New Custom Object' setup page in Salesforce. The page is titled 'New Custom Object' and includes a search bar at the top. The main content area is divided into several sections:

- Optional Features:** Includes checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'.
- Object Classification:** Includes a note about Enterprise vs. Light Application objects and checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'.
- Deployment Status:** Includes radio buttons for 'In Development' and 'Deployed'.
- Search Status:** Includes a checkbox for 'Allow Search'.
- Object Creation Options:** Includes checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'.

At the bottom of the page, there are three buttons: 'Save', 'Save & New', and 'Cancel'.

9. Leave everything else as is, and click save.

Activity: 2

Create a Relationships Object

Creating a master-detail relationship between Job posting and job posting site.

1. From setup, click object manager.
2. Select Job posting object, click on field and relationships, click new.

3. Select the data type as Master-detail relationship.
4. Click Next, relate to the Job posting site.
5. Enter the label Job Posting site.
6. Click next, next, next and save.

Creating a master-detail relationship between job posting and position.

1. From setup, click object manager.
2. Select Job posting object, click on field and relationships, click new.
3. Select the data type as Master-detail relationship.
4. Click Next, relate to position.
5. Enter the label Position.
6. Click next, next, next and save.

Milestone 7: Page Layout

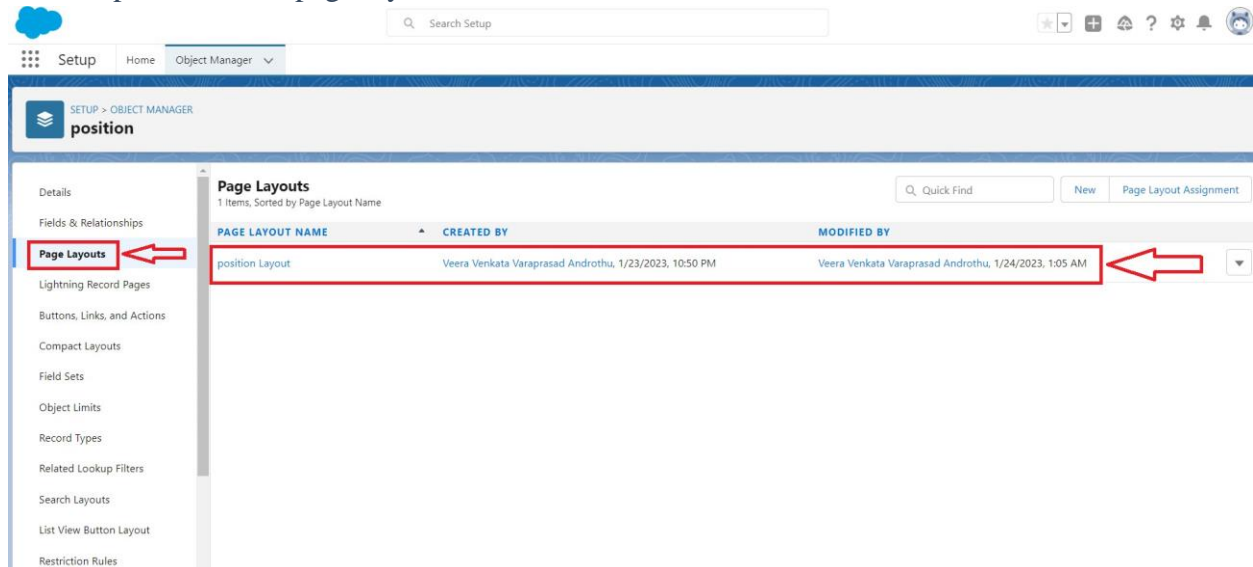
What is Page Layout?

In Salesforce, a page layout is a visual design of a page that determines the organization and arrangement of fields, buttons, and other components on a page. Page layouts can be customized to show the fields and related information that are most relevant to different users, roles, and record types. They can also be used to control the visibility and access to fields, buttons, and other components on a page.

Activity-1

Modifying the page layouts :

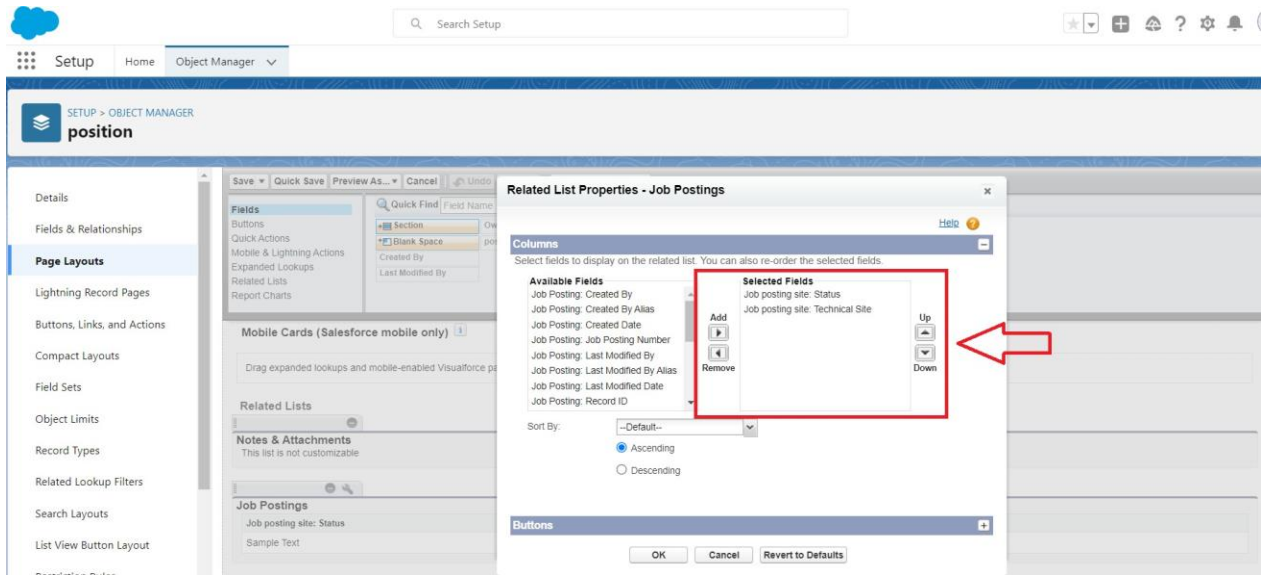
1. From setup, click on object manager.
2. Click position, then page layouts.



The screenshot shows the Salesforce Setup interface. The left sidebar has a red box around 'Page Layouts' with a red arrow pointing to it. The main content area shows 'Page Layouts' for the 'position' object. A table lists one layout: 'position Layout', created by 'Veera Venkata Varaprasad Androthu' on 1/23/2023 at 10:50 PM, and modified by the same user on 1/24/2023 at 1:05 AM. A red box highlights the 'position Layout' row, and a red arrow points to the edit icon (wrench) in the rightmost column.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
position Layout	Veera Venkata Varaprasad Androthu, 1/23/2023, 10:50 PM	Veera Venkata Varaprasad Androthu, 1/24/2023, 1:05 AM

3. Click down arrow next to the position layout and select edit.
4. Scroll down to the job posting related list, and click the wrench icon in the header to edit it.
5. From the available fields section, select
Job posting site : Status
Job posting site : Technical Site
6. Click add.
7. From the selected fields section, select job posting : Job posting number and click remove.



8. Click ok, then save.

Activity-2

Create a Page layout for Review Object

Milestone 8 : Validation Rules

What are Validations Rules?

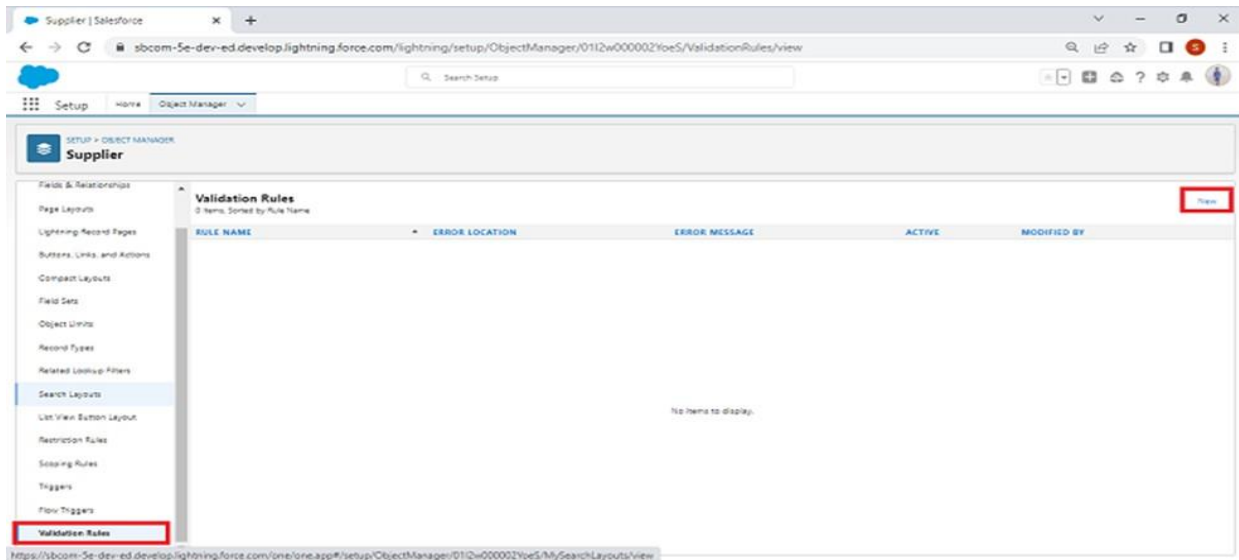
A validation rule is a process which checks out (validate) the inputs given by any user is correct or not according to your requirement.

Activity -1

Creating a Validation Rule:

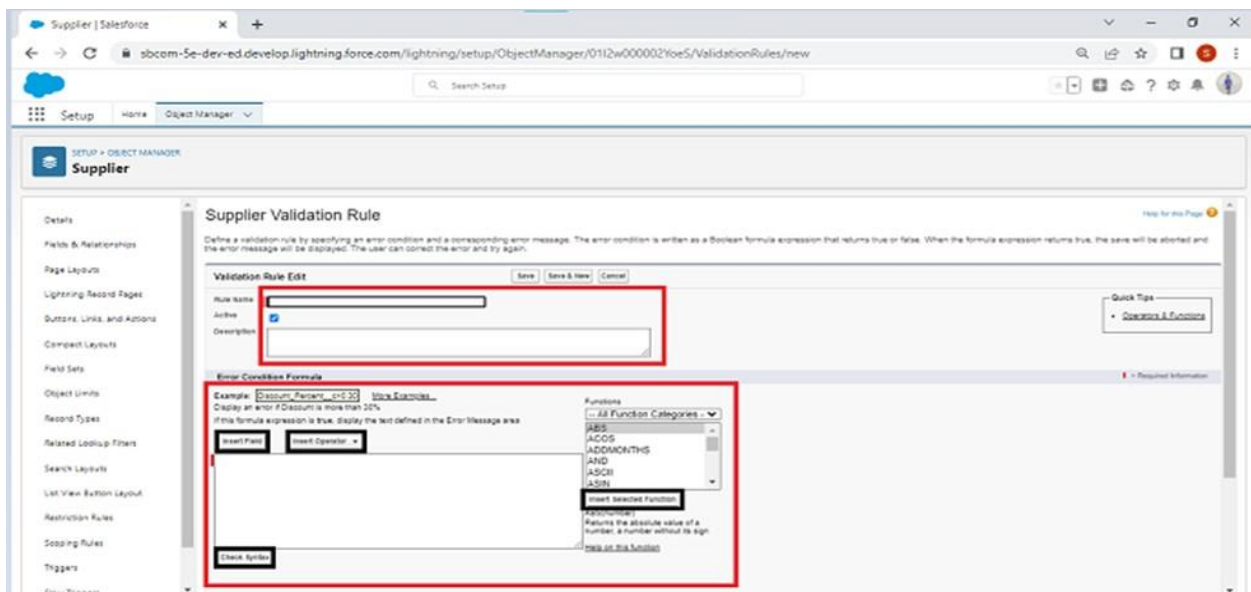
To create a validation rule:

Go to object manager, select the object on which validation rule has to be implemented, scroll down and click validation rule, New.

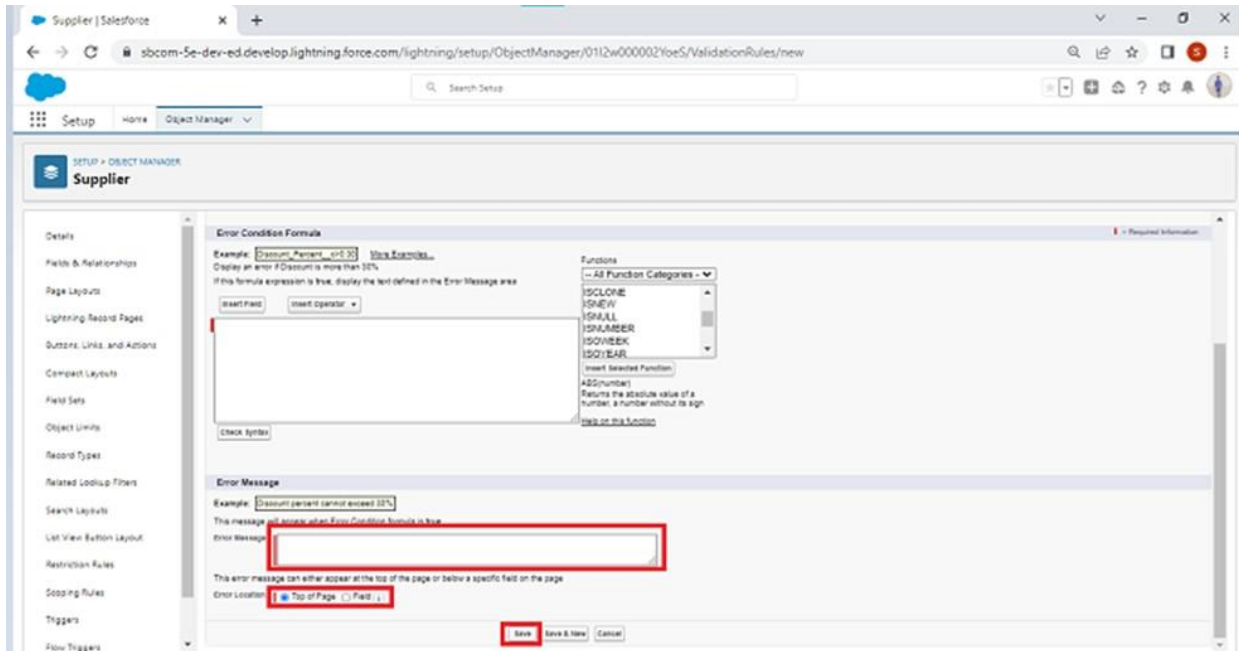


Give details as:

1. Rule name: Phone number validation rule.
2. Active: checked
3. Description: phone number should not be more than or less than 10 digits.
4. Under Error Condition Formula: write the condition using insert field, insert operator, insert function
5. Using check syntax: check if the formula you entered is valid or not.



6. Error Message: Please give a valid phone number
7. Error location: select field
8. Save



Supplier | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000002YoeS/ValidationRules/new

Setup

Supplier

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 Action Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Error Condition Formula

Example: `Discount_Percent > 30` [View Examples...](#)

Display an error if Discount is more than 30%.

If this formula expression is true, display the text defined in the Error Message area.

Insert text Insert operator

check syntax

Functions

— All Function Categories —

ISCLOSE

ISDATE

ISNULL

ISNUMBER

ISNONBLANK

ISOT/EAR

Insert function

ADDNUMBER

Returns the absolute value of a number, a number without its sign.

[Help on this Function](#)

Error Message

Example: `Discount percent cannot exceed 30%`

This message will appear when Error Condition Formula is true.

Error Message

This error message can either appear at the top of the page or below a specific field on the page.

Error Location: [Top of Page](#) [Field](#)

Save Save & New Cancel

Activity-2

Create a Validation rule For Technical Site Checkbox is equal to True.

Milestone 9 : Profile

What is a profile?

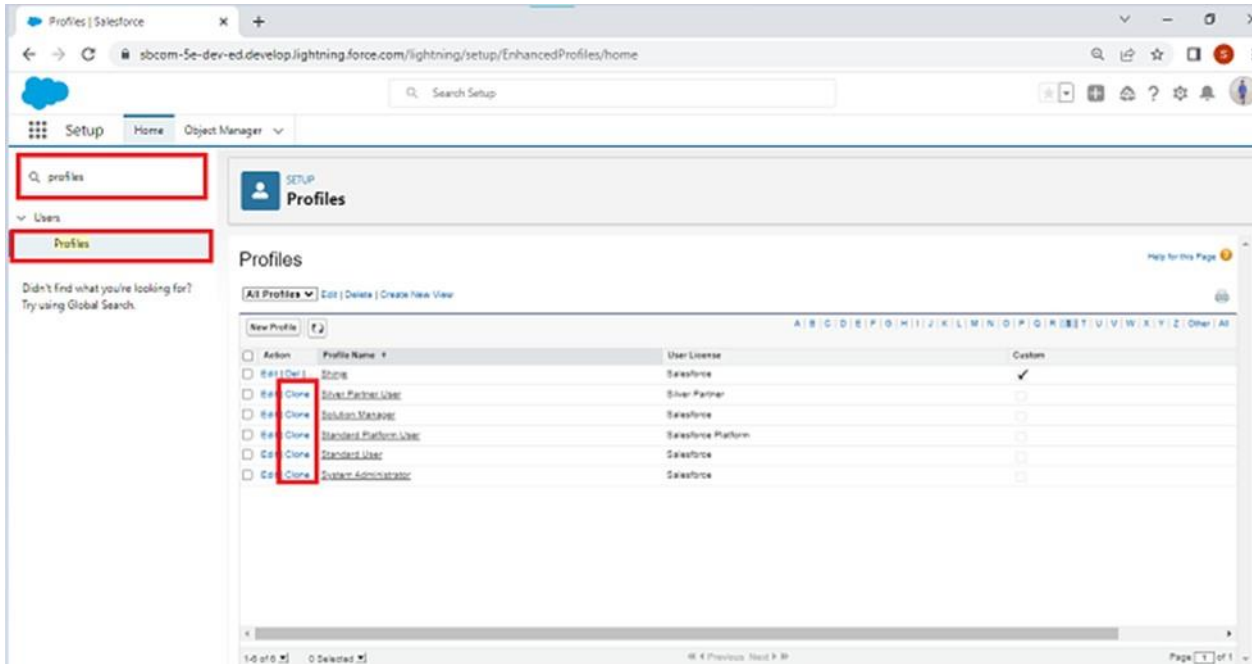
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

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

Activity

Creation on profile:

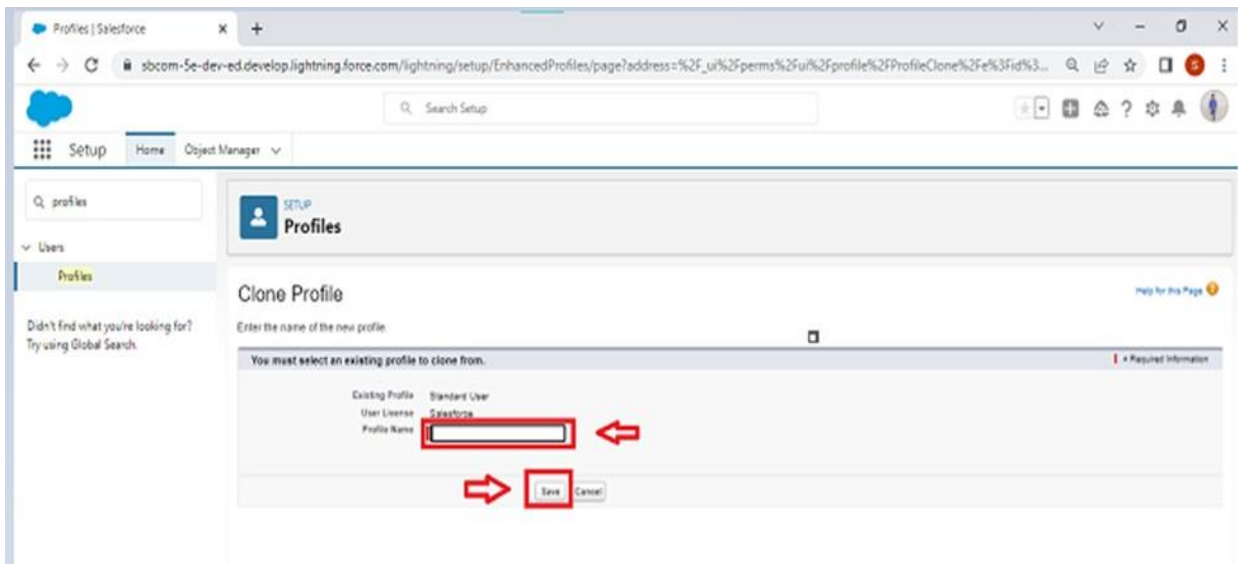
From Setup enter Profiles in the Quick Find box, and select Profiles.



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar has a search bar with 'profiles' entered and the 'Profiles' link highlighted. The main content area shows a table of profiles. The 'Standard User' profile is selected, and the 'Clone' button next to it is highlighted with a red box. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit	Shop	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Clone	Solution Master User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	System Administrator	Salesforce	<input type="checkbox"/>

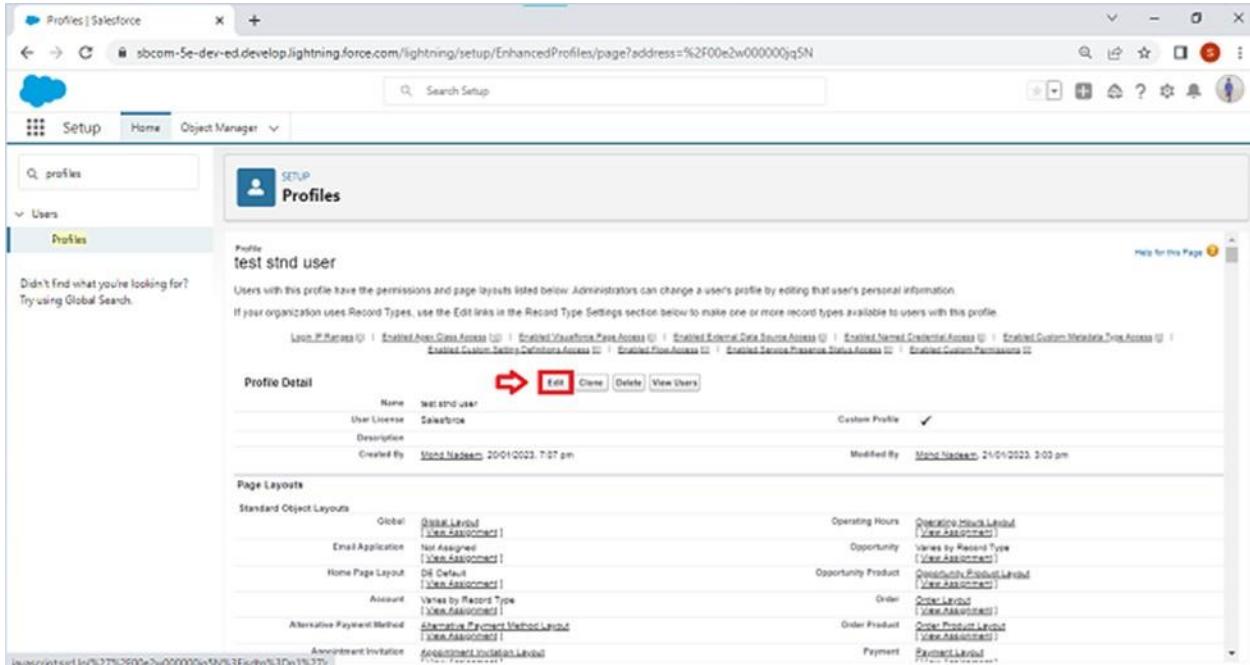
1. From the list of profiles, find Standard User.
2. Click Clone.
3. For Profile Name, enter Event user profile.
4. Click Save



The screenshot shows the 'Clone Profile' page in Salesforce Setup. The page title is 'Clone Profile'. Below the title, there is a section 'You must select an existing profile to clone from.' with a table showing the 'Existing Profile' as 'Standard User' and 'User License' as 'Salesforce'. The 'Profile Name' field is empty and highlighted with a red box. Below the table, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red arrow.

Existing Profile	User License	Profile Name
Standard User	Salesforce	

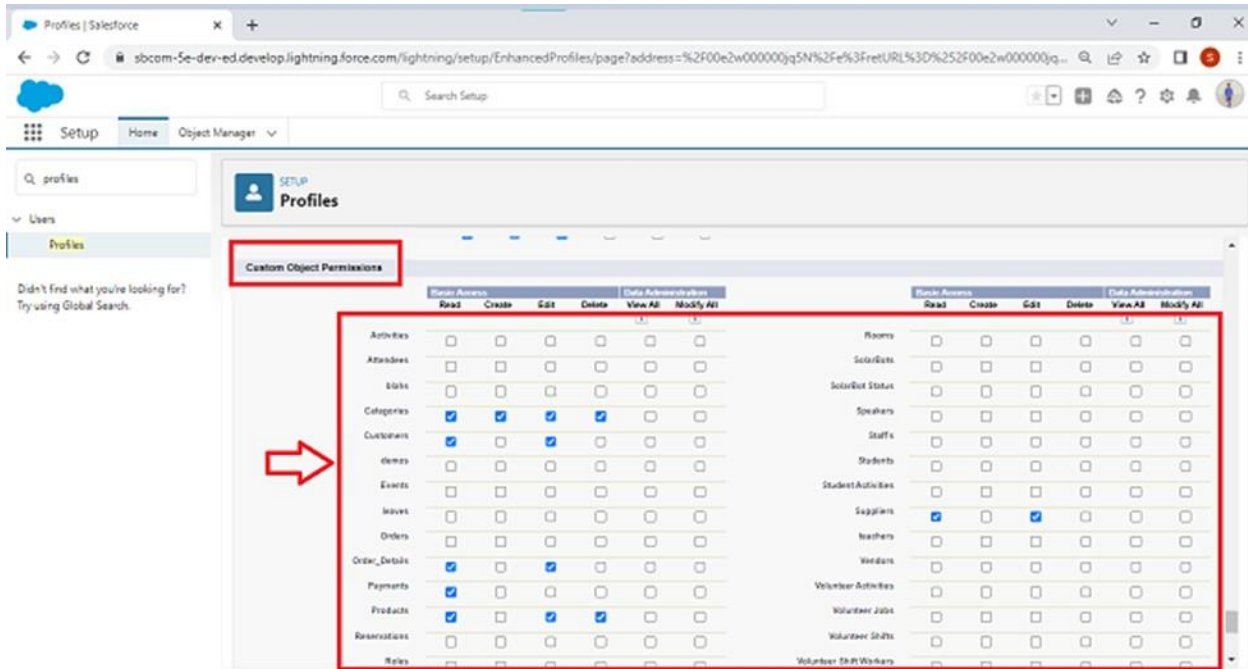
5. While still on the Event profile page, then click Edit.



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The profile being viewed is 'test stnd user'. The 'Edit' button is highlighted with a red box and a red arrow. Below the profile details, there is a 'Page Layouts' section with a table of layouts. The 'Standard Object Layouts' section is visible, showing various layouts for different objects.

Standard Object Layouts	Global	Operating Hours
Global	Global Layout [View Assignment]	Operating Hours Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Opportunity
Home Page Layout	DE Default [View Assignment]	Opportunity Product
Account	Views by Record Type [View Assignment]	Order
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order Product
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Payment

6. Scroll down to Custom Object Permissions and Give view all access permissions to the Order details, supplier, product, customer, category, payment.



The screenshot shows the Salesforce Setup interface for Profiles. The 'Custom Object Permissions' section is highlighted with a red box. A red arrow points to the 'Activities' row in the table.

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rooms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attendees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SolarBots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bids	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SolarBot Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Speakers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Staffs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Student Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leaves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order_Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Wardens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Volunteer Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Volunteer Jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reservations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Volunteer Shifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Relics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Volunteer Shift Workday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Activity-2

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

Milestone 10: User

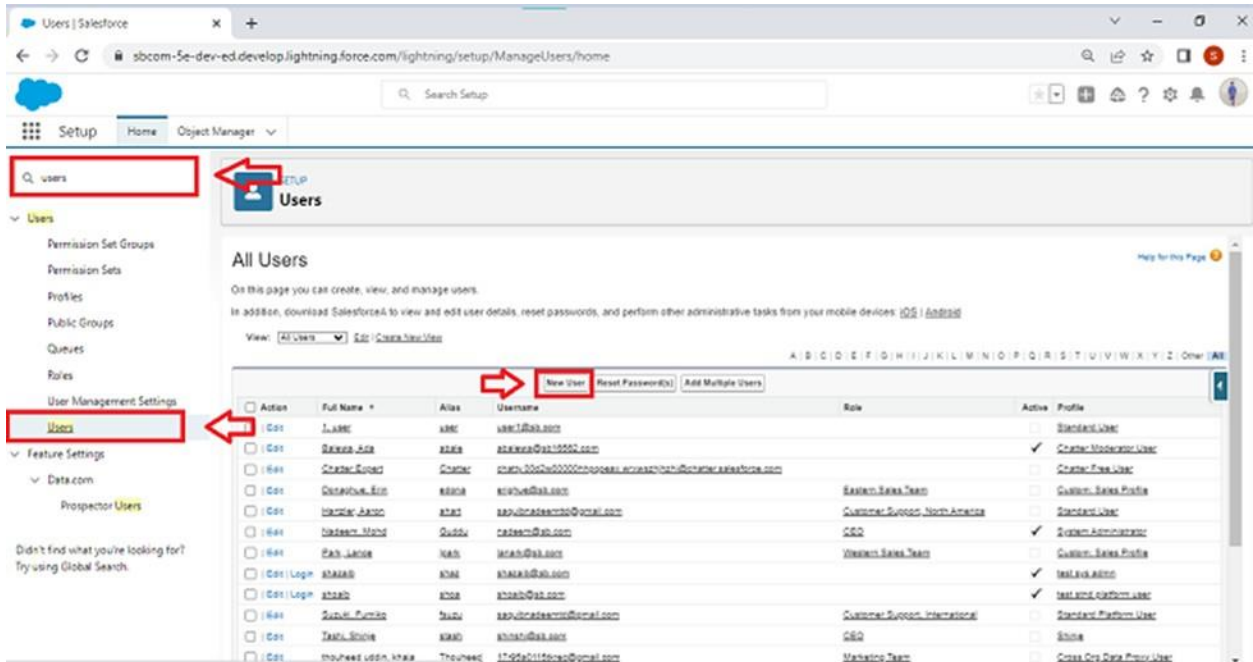
What is a user?

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.

Activity-1

Creating a User:

From setup type “users” in quick find and select users, then click New User



Users | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

users

Users

All Users

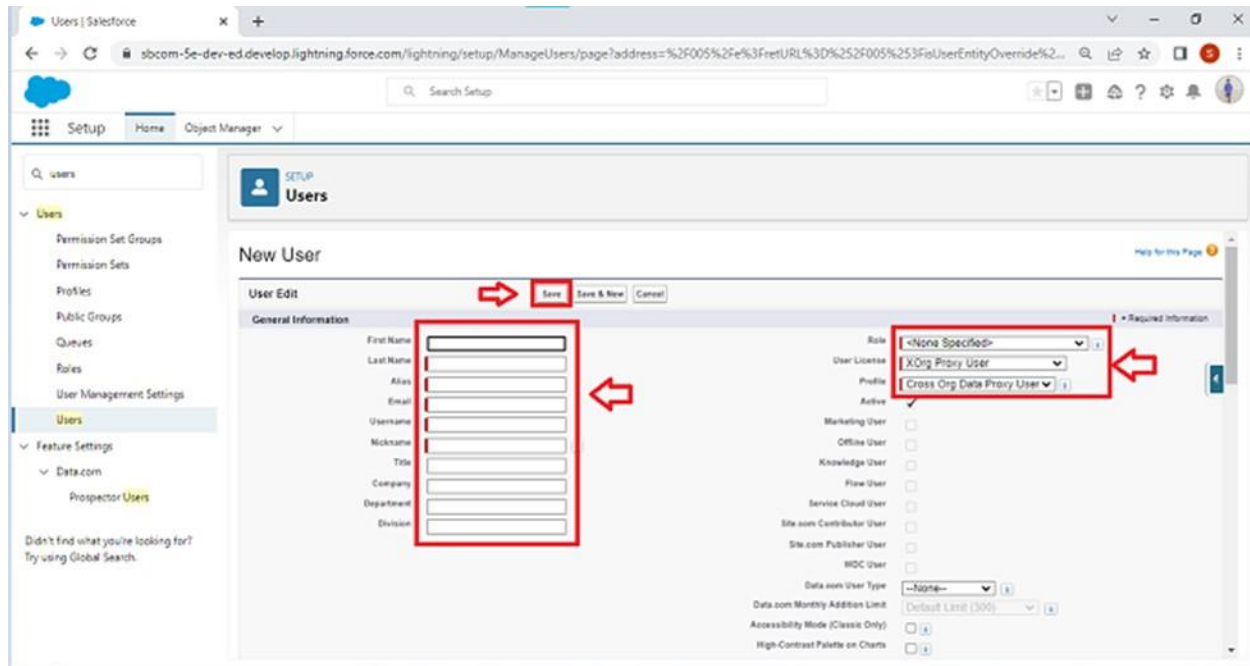
On this page you can create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices. [iOS](#) | [Android](#)

View: All Users | [Click to Create New User](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	John Doe	JDoe	john.doe@salesforce.com	Standard User	<input type="checkbox"/>	Standard User
<input type="checkbox"/>	Sanjay Gupta	SG	sanjaygupta@thesmartbridge.com	Customer Manager User	<input checked="" type="checkbox"/>	Customer Manager User
<input type="checkbox"/>	Chetan Kumar	CK	chetan.kumar@salesforce.com	Customer Free User	<input type="checkbox"/>	Customer Free User
<input type="checkbox"/>	Chetan Kumar	CK	chetan.kumar@salesforce.com	Customer Sales Profile	<input type="checkbox"/>	Customer Sales Profile
<input type="checkbox"/>	Chetan Kumar	CK	chetan.kumar@salesforce.com	Customer Support North America	<input type="checkbox"/>	Customer Support North America
<input type="checkbox"/>	Chetan Kumar	CK	chetan.kumar@salesforce.com	CEO	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chetan Kumar	CK	chetan.kumar@salesforce.com	Customer Sales Profile	<input type="checkbox"/>	Customer Sales Profile
<input type="checkbox"/>	Chetan Kumar	CK	chetan.kumar@salesforce.com	Customer Support International	<input type="checkbox"/>	Customer Support International
<input type="checkbox"/>	Chetan Kumar	CK	chetan.kumar@salesforce.com	CEO	<input type="checkbox"/>	CEO
<input type="checkbox"/>	Chetan Kumar	CK	chetan.kumar@salesforce.com	Marketing Team	<input type="checkbox"/>	Marketing Team

- First Name: Sanjay
- Last Name: Gupta
- Alias: Sanj
- Email: provide your personal email id for future reference
- Username: sanjaygupta@thesmartbridge.com
- Nickname: Sanju
- Role: leave it as default
- User License: Salesforce
- Profile: Event User Profile



Activity-2

Create a user with a username as “Abhilash Garapati”, and assign him the sales profile.

Milestone 11 : Permission set

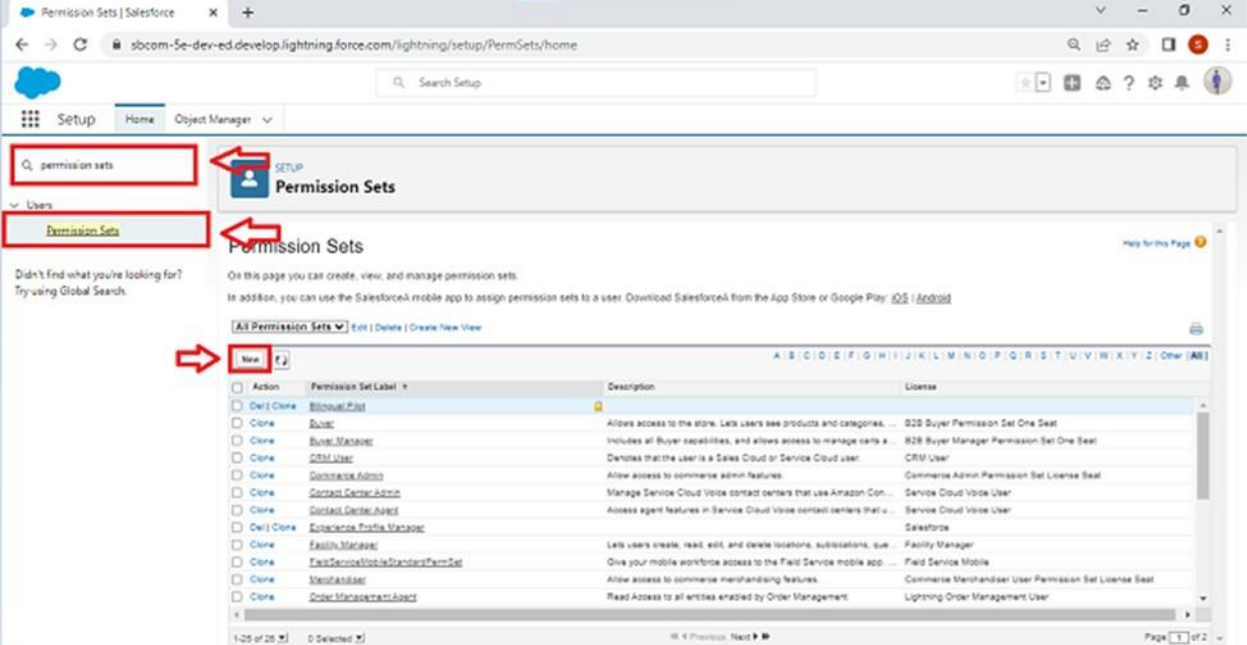
What is the Permission set?

In Salesforce, a permission set is a collection of settings and permissions that give users access to various tools and functionality in the platform. Permission sets can be used to grant additional access to users beyond what is included in their profile, without modifying the profile itself. This allows for granular control over user access and permissions within the Salesforce environment. Permission sets can be assigned to individual users or to a group of users.

Activity-1

Creating a Permission Set:

1. From setup search “permission sets” in quick find and select permission set then click on New.



Permission Sets | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

permission sets

Users

Permission Sets

On this page you can create, view, and manage permission sets. In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

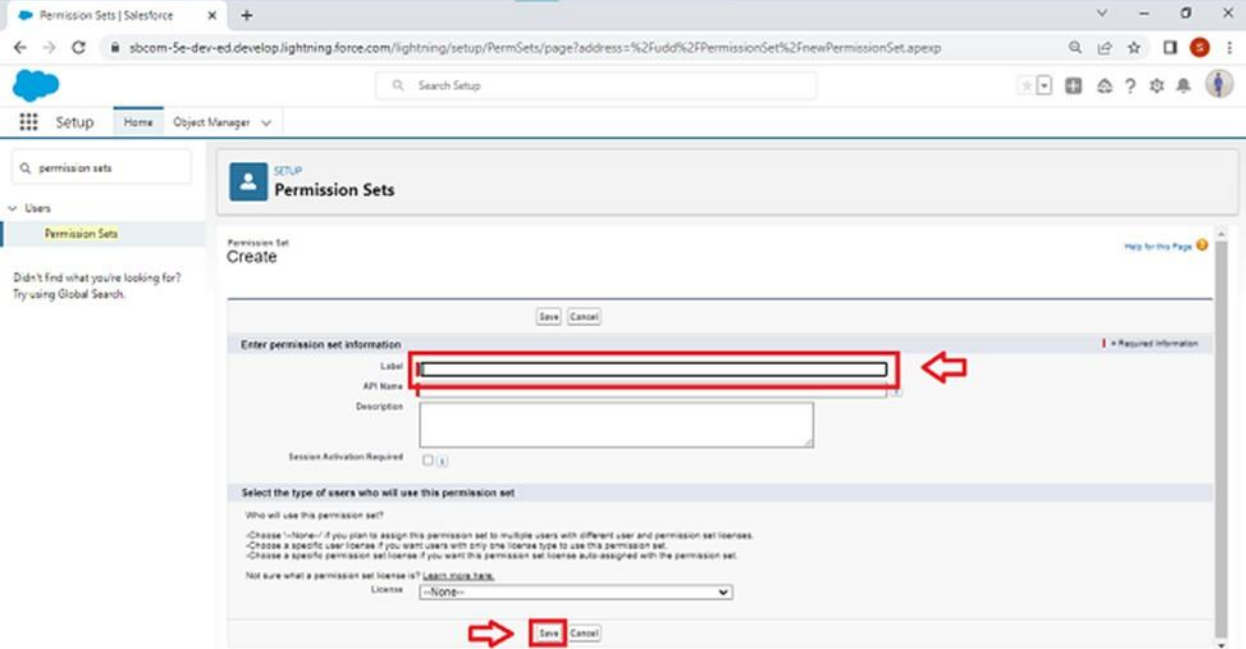
New

Action	Permission Set Label	Description	License
<input type="checkbox"/> Del Clone	Business Plan		
<input type="checkbox"/> Clone	Basic	Allows access to the store. Lets users see products and categories. ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Con...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
<input type="checkbox"/> Del Clone	Enterprise Profile Manager		Salesforce
<input type="checkbox"/> Clone	Field Manager	Lets users create, read, edit, and delete locations, subscriptions, que...	Field Manager
<input type="checkbox"/> Clone	Field Service Mobile Standard Perm Set	Give your mobile workforce access to the Field Service mobile app. ...	Field Service Mobile
<input type="checkbox"/> Clone	Merchant Admin	Allow access to commerce merchandising features.	Commerce Merchant User Permission Set License Seat
<input type="checkbox"/> Clone	Order Management Agent	Read Access to all entities enabled by Order Management.	Lightning Order Management User

1-20 of 20 0 Selected

Page 1 of 2

2. Enter label as: Supplier Permits and Save.



Permission Sets | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

permission sets

Users

Permission Sets

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

SETUP

Permission Sets

Permission Set Create

Save Cancel

Enter permission set information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

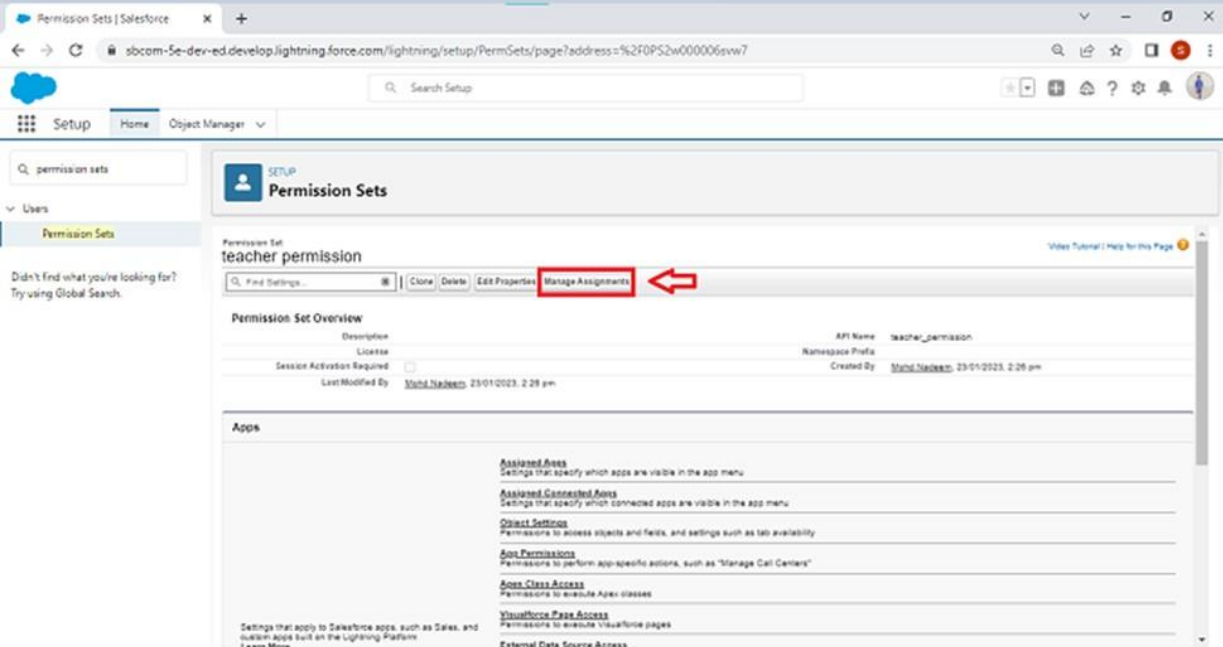
- Choose "None" if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License

Save Cancel

3. After saving the permission click on the Manage assignment



Permission Sets | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPS2w000006vww7

Setup Home Object Manager

permission sets

Users

Permission Sets

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

SETUP

Permission Sets

Permission Set teacher permission

Find Settings... Clone Delete Edit Properties **Manage Assignments**

Permission Set Overview

Description

License

Session Activation Required ☐

Last Modified By [Vishal Nadeem](#) 23/01/2023, 2:28 pm

API Name [teacher_permission](#)

Namespace Prefix

Created By [Vishal Nadeem](#) 23/01/2023, 2:28 pm

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

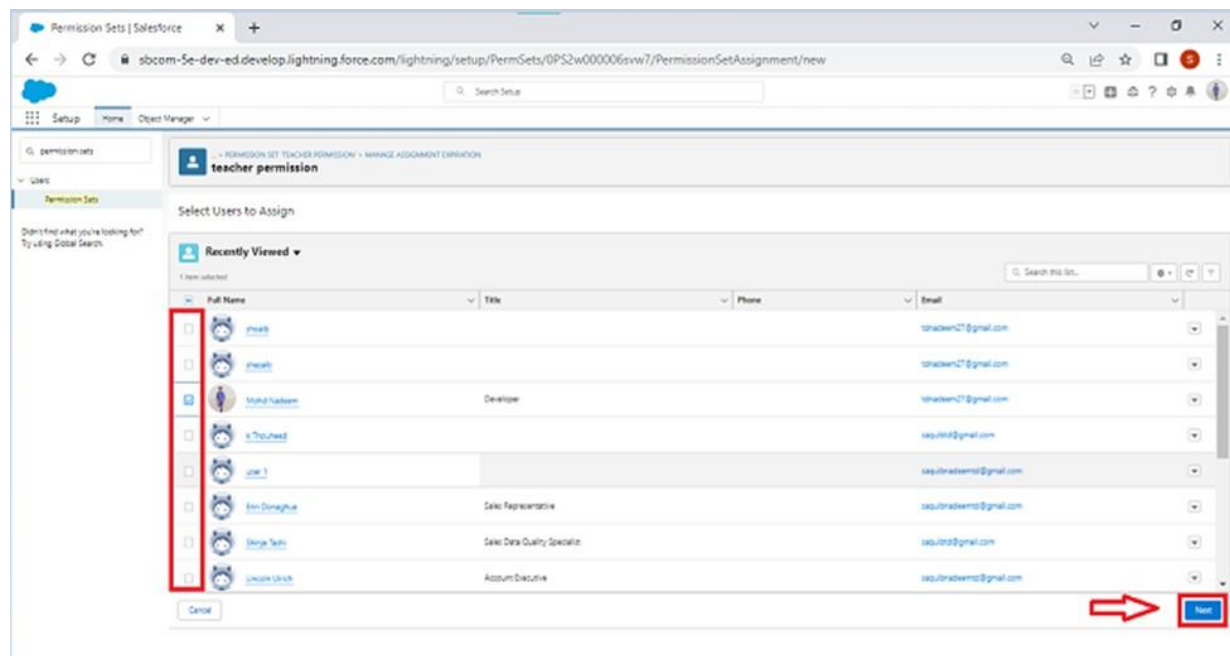
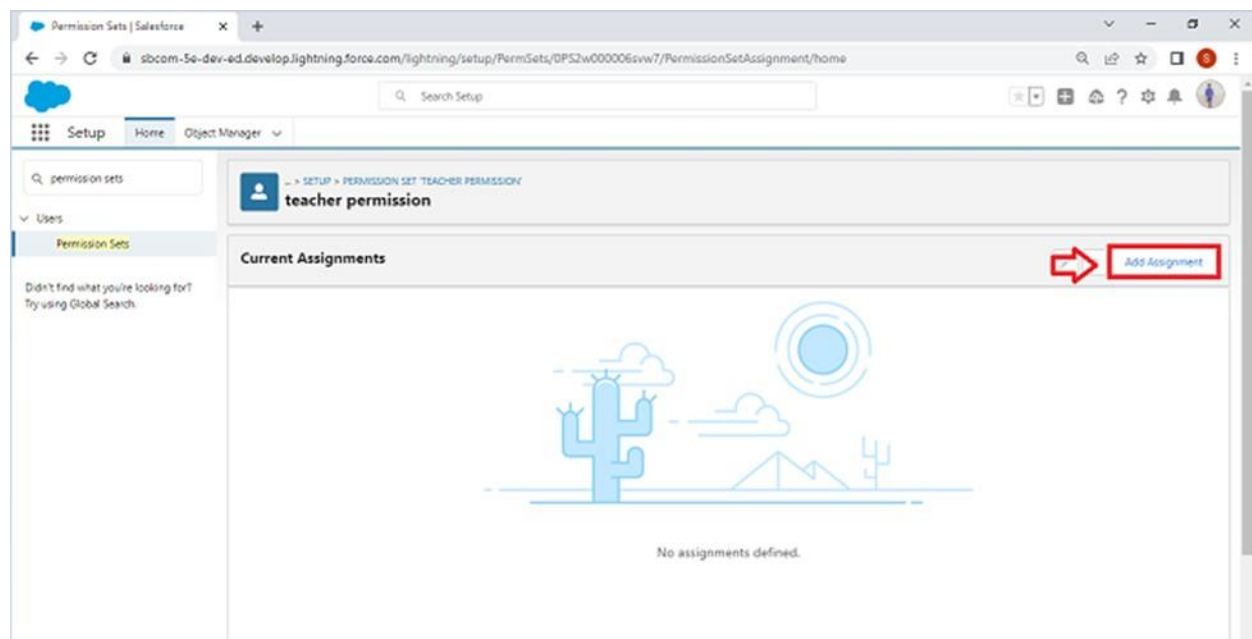
App Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform [Learn More](#)

External Data Source Access

4. Now click on the Add Assignment



Activity-2

Create a Permission set for Review object

Milestone 12: Reports

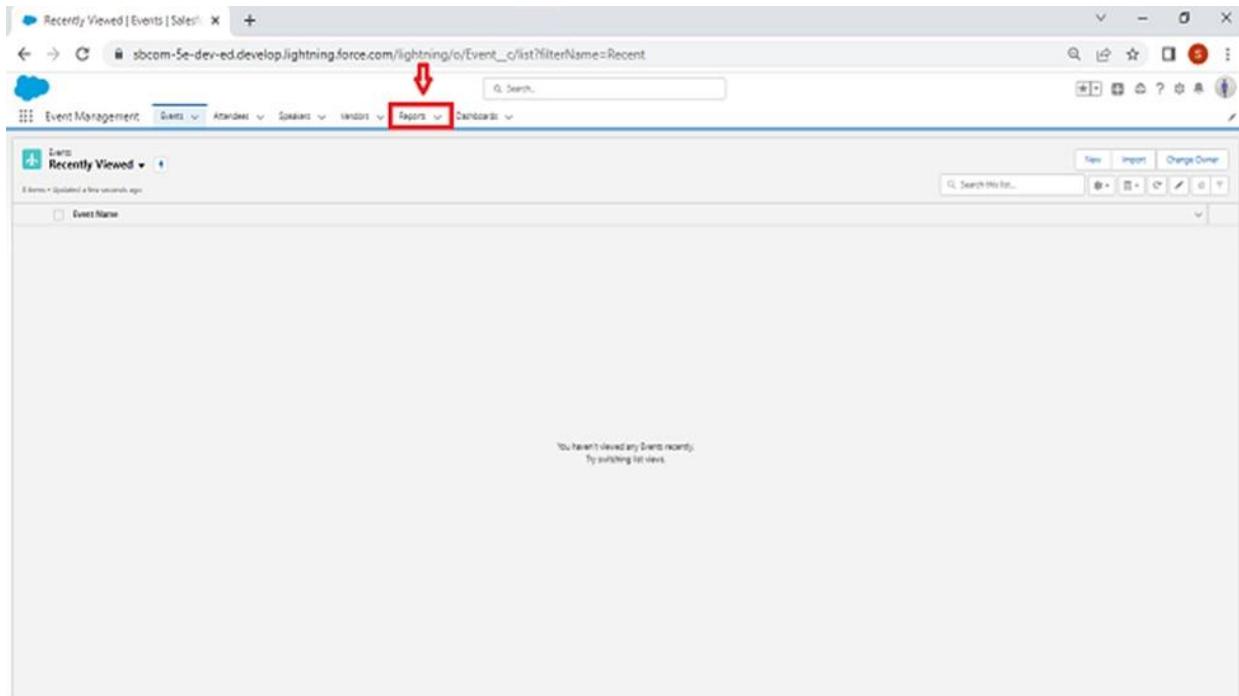
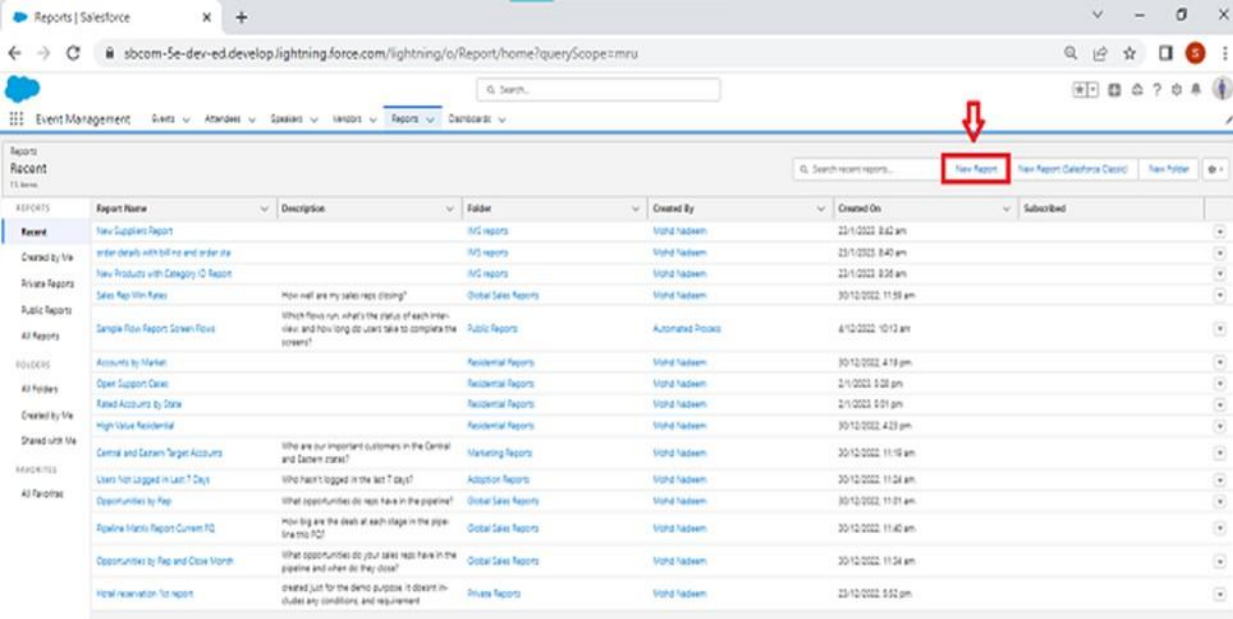
What are Reports?

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.

Activity-1

Reports:

1. From the Reports tab, click New Report.

Reports | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Event Management | Events | Attendees | Speakers | Vendors | **Reports** | Dashboards

Search recent reports...

New Report | New Report Salesforce Classic | New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Suppliers Report		MSG reports	Mohd Nadeem	23-11-2022 8:42 am	
Created by: Me	Order details with bill no and order id		MSG reports	Mohd Nadeem	23-11-2022 8:40 am	
Private Reports	New Products with Category ID Report		MSG reports	Mohd Nadeem	23-11-2022 8:26 am	
Public Reports	Sales Rep Win Rates	How well are my sales reps doing?	Global Sales Reports	Mohd Nadeem	30-12-2022 11:58 am	
All Reports	Sample Flow Report Screen Flow	Which flow runs, what's the status of each inter-view, and how long do users take to complete the screens?	Public Reports	Automated Process	4-12-2022 10:12 am	
FOCUS AREAS	Accounts by Market		Residential Reports	Mohd Nadeem	30-12-2022 4:19 pm	
All Folders	Open Support Cases		Residential Reports	Mohd Nadeem	2-11-2022 5:28 pm	
Created by: Me	Rated Accounts by State		Residential Reports	Mohd Nadeem	2-11-2022 5:01 pm	
Shared with Me	High Value Residential		Residential Reports	Mohd Nadeem	30-12-2022 4:23 pm	
MARKETING	Central and Eastern Target Accounts	Who are our important customers in the Central and Eastern states?	Marketing Reports	Mohd Nadeem	30-12-2022 11:16 am	
ADAPTIVITIES	Users Not Logged in Last 7 Days	Who hasn't logged in the last 7 days?	Adoption Reports	Mohd Nadeem	30-12-2022 11:24 am	
All Reports	Opportunities by Rep	What opportunities do reps have in the pipeline?	Global Sales Reports	Mohd Nadeem	30-12-2022 11:01 am	
	Pipeline Month Report Current PQ	How big are the deals at each stage in the pipeline this PQ?	Global Sales Reports	Mohd Nadeem	30-12-2022 11:42 am	
	Opportunities by Rep and Close Month	What opportunities do your sales reps have in the pipeline and when do they close?	Global Sales Reports	Mohd Nadeem	30-12-2022 11:24 am	
	Hotel reservation list report	created just for the demo purpose. It doesn't include any conditions and requirement	Private Reports	Mohd Nadeem	23-12-2022 5:52 pm	

2. Select the report type Attendees with events for the report, and click Create.

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

File and Content Reports

Individuals

Other Reports

Hidden Report Types

Select a Report Type

Search Report Types...

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard
Contacts with Assets	Standard
Accounts with SolarBots	Standard
Account History	Standard
Contact History	Standard
D&B Company with and without Accounts	Standard
Opportunities	Standard
Opportunities with Products	Standard
Opportunities with Contact Roles	Standard
Opportunities with Partners	Standard
Opportunities with Competitors	Standard
Opportunity History	Standard
Opportunity Field History	Standard
Opportunity Trends	Standard

Details

Accounts
Standard Report Type

Start Report

Details Fields (71)

Created By You

- Accounts by Market
Last Used 1/3/2023
- Rated Accounts by State
Last Used 1/2/2023
- High Value Residential
Last Used 1/2/2023

Created By Others
No Reports Yet

Objects Used in Report Type

- Role
- Account
- Operating Hours
- Asset

3. Customize your report accordingly and include all fields, then save or run it.

Report Builder | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/one/one.app#eyJb21wb251bnREZWY0YjZlbnRzOnlkcG9ydEJ1aWxkZXIiLCJhdHRyW1dGVzIjp7InltY29yZBkjoili...

Event Management | Events | Attendees | Speakers | Vendors | Reports | Campaigns

REPORT *
New Accounts Report / Accounts

Get Feedback? | Save | Save & Run | Run | Close | Run

Previewing a limited number of records. Run the report to see everything.

Lead Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	Muhd Nadeem	United DR & Gas, Singapore	-	Customer - Direct	Medium	15/01/2023
2	Muhd Nadeem	United DR & Gas, UK	-	Customer - Direct	Medium	15/01/2023
3	Muhd Nadeem	University of Arizona	-	Customer - Direct	Warm	15/01/2023
4	Muhd Nadeem	Whitney Kyles Household	-	Residential	Hot	15/01/2023
5	Muhd Nadeem	Whitney Kyles Household	-	Residential	Hot	15/01/2023
6	Muhd Nadeem	Reena parner	-	Customer - Direct	Warm	15/01/2023
7	Muhd Nadeem	guyz household	-	Homebased Partner	Cold	15/01/2023
8	Muhd Nadeem	Raj Health Household	-	Residential	Cold	15/01/2023

Fields: Groups | Columns

Columns: Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, Last Modified Date

Update Preview Automatically

Activity-2

Create a report for review and Job Posting Objects.