

# CRM Project – HR Recruitment Process

## Phase 1: Problem Understanding & Industry Analysis

### Goal:

Identify why organizations require a Salesforce-based HR Recruitment CRM and analyze the recruitment challenges in modern enterprises.

### Problem Statement:

Organizations face delays in filling critical job positions due to fragmented recruitment processes, reliance on emails and spreadsheets, and poor visibility into candidate pipelines. These manual methods increase the risk of miscommunication, missed follow-ups, and inconsistent candidate evaluations. High attrition rates or rapid business expansion amplify these challenges, leading to prolonged vacancies, higher recruitment costs, and reduced productivity.

### Solution:

A Salesforce-based HR Recruitment CRM will centralize job requisitions, candidate profiles, and interview schedules. It automates workflows such as candidate status tracking, interview reminders, and offer approvals. Dashboards and reports will give HR managers and recruiters real-time insights to optimize hiring cycles, improve candidate experience, and ensure data security.

### Stakeholders:

- ✓ HR Manager → Creates and manages job openings, monitors KPIs, and approves offers.
- ✓ Recruiters → Source candidates, update statuses, and coordinate interviews.
- ✓ Department Heads → Approve job requisitions and participate in interview panels.
- ✓ IT Admin → Maintains CRM configuration, permissions, and integrations.
- ✓ Candidates → Apply for positions and track their application status.

### Business Process Flow:

Job Request Raised → HR Creates Job Opening → Recruiters Source Candidates

(LinkedIn, Referrals, Portals) → Screening and Shortlisting → Interview Scheduling &

Feedback → Department Head Approval → Offer Generation & Communication →

Candidate Onboarding → Job Opening Closed.

**KPIs:**

- Time-to-Hire (average days to fill a role)
- Offer Acceptance Rate
- Candidate Conversion Rate (screened to hired)
- Recruiter Productivity (applications processed per recruiter)
- Employee Retention Rate post-hire

**Requirement Gathering Highlights:**

- Functional Requirements: Job creation, candidate management, interview scheduling, approvals, and dashboards.
- Non-Functional Requirements: Secure access, scalability for high-volume hiring, and mobile-friendly UI.
- Pain Points Identified: Lack of automated notifications, inefficient approval workflows, and scattered candidate data.

**Industry-Specific Use Case Analysis:**

- Benchmarked against popular ATS tools (e.g., Workday, LinkedIn Recruiter).
- Identified trends like AI-powered resume screening and automated reminders.
- Ensured compliance with data protection regulations (e.g., GDPR for candidate data privacy).

**AppExchange Exploration:**

- Reviewed Salesforce AppExchange for HR solutions such as Applicant Tracking Systems and Resume Parsers.
- Found potential integrations like LinkedIn Connector for Salesforce and resume parsing utilities.
- Selected components that could complement our custom recruitment workflow.

## Phase 2: Org Setup & Configuration

### Goal:

Prepare the Salesforce org for implementing the HR Recruitment Process CRM by configuring company settings, user roles, permissions, and foundational security measures.

### Salesforce Edition:

- Developer Edition Org used for development and testing.
- Includes custom objects, Flows, Apex, Approval Processes, and Lightning components.
- Sandbox is used for testing automation and deployment before production.

### Company Profile Setup:

- Navigated to Setup → Company Information.
- Updated organization name to “HR Recruitment CRM”.
- Currency: INR, Locale: India, Time zone: IST.
- Ensured reports and currency fields reflect correct region settings.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar and a list of setup categories: Company Settings, Calendar Settings, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and displays the organization's profile for 'HR Recruitment CRM'. The profile includes details such as Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, and various system settings like Newsletter, Admin Newsletter, and Locale Formats. A table at the bottom shows the User Licenses, including the Name, Status, Total Licenses, Used Licenses, Remaining Licenses, and Expiration Date.

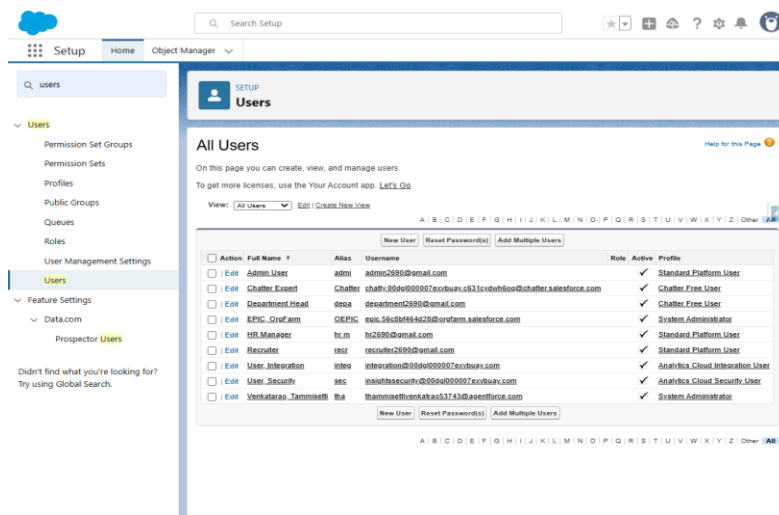
Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	4	2	2	
Analytics Cloud Information Store	Active	2	2	0	

## Fiscal Year Settings & Business Hours:

- Fiscal Year: Standard, starting from January.
- Defined Business Hours: Monday–Friday, 9 AM–6 PM.
- Added Key Holidays: Republic Day, Diwali, Independence Day.

## User Setup & Licenses:

- Created test users for role-based testing:
  - Admin User – Full system access.
  - HR Manager – Approve offers and manage openings.
  - Recruiter – Manage candidate records and schedule interviews.
  - Department Head – View job openings and approve requisitions.
- Assigned Standard User licenses and mapped them to roles.



## Profiles:

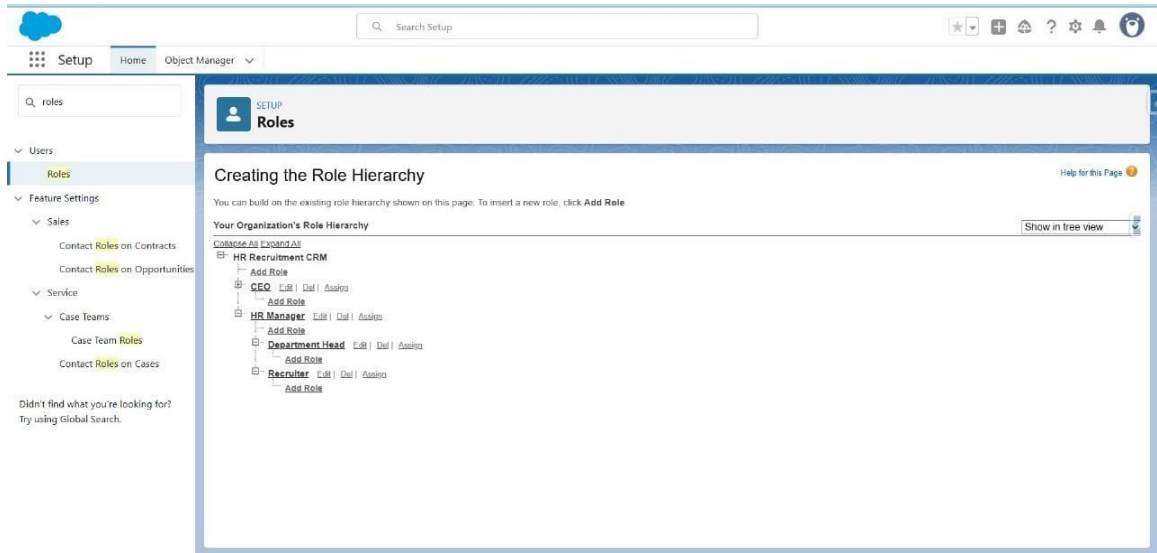
- Recruiter Profile → CRUD on Candidate & Interview objects, Read-only on Job Opening.
- HR Manager Profile → Full access on Job Openings, Candidates, and Interviews.
- Department Head Profile → Read/Edit on Job Openings and Interviews.
- Admin Profile → Full system access.

The screenshot shows the Salesforce Setup interface with the 'Profiles' section selected. The 'HR Manager' profile is displayed. The profile details include the name 'HR Manager', user license 'Salesforce', and a custom profile. The page layouts section shows various standard object layouts assigned to the profile, including Global, Email Application, Home Page Layout, Account, and Alternative Payment Method. The page also includes a search bar and a sidebar with navigation options like Setup, Home, and Object Manager.

The screenshot shows the Salesforce Setup interface with the 'Profiles' section selected. The 'Recruiter Profile' is displayed. The profile details include the name 'Recruiter Profile', user license 'Salesforce', and a custom profile. The page layouts section shows various standard object layouts assigned to the profile, including Global, Email Application, Home Page Layout, Account, and Alternative Payment Method. The page also includes a search bar and a sidebar with navigation options like Setup, Home, and Object Manager.

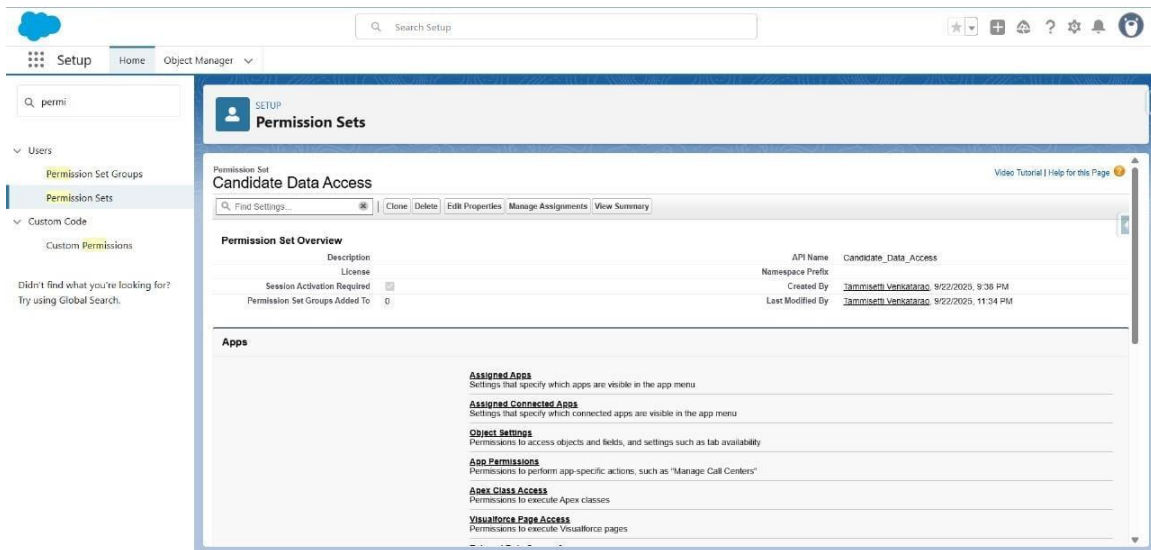
## Roles & Role Hierarchy:

- Admin → HR Manager → Recruiter / Department Head.
- Ensures managers can view and approve records owned by subordinates.



## Permission Sets:

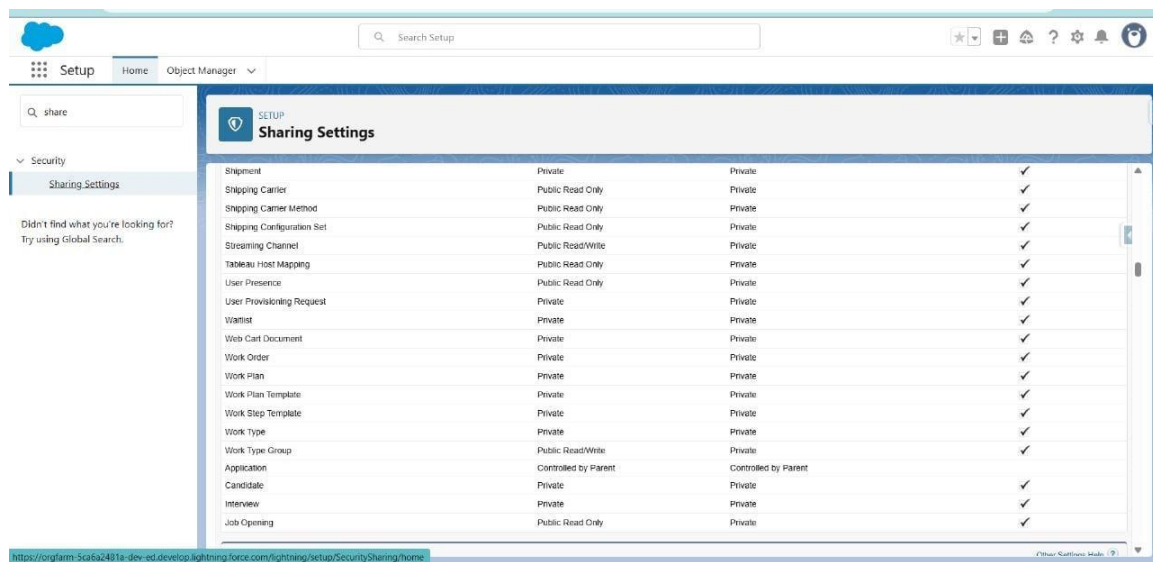
- Created a “Candidate Data Access” permission set to grant temporary or additional permissions.
- Assigned permission sets for testing advanced access scenarios.



## OWD (Organization-Wide Defaults) & Sharing Rules:

- Sharing Settings:
  - Job Openings = Private.
  - Candidates = Private.

- Interviews = Controlled by Parent (Candidate).
- Sharing Rules:
  - Share Candidate records owned by Recruiters with HR Managers (Read/Write).
  - Share Job Openings with Department Heads for visibility.



## Login Access Policies:

- Default policies retained (Admins can log in as users to troubleshoot issues).
- Enabled IP restrictions for added security.

## Sandbox Usage & Deployment Basics:

- Created a Developer Sandbox for testing automation and approval flows.
- Deployment Basics:
  - Used Change Sets to migrate configurations to production.
  - Validated deployments before applying to the live environment.

**Deliverables:**

- Configured Salesforce org with company profile, business hours, and fiscal year.
- Defined user roles, profiles, and permission sets.
- Established OWD, sharing rules, and login policies for secure data access.
- Sandbox created and deployment steps documented.



## Phase 3: Data Modeling & Relationships

### Goal:

Build a robust data model that represents jobs, candidates, applications, interviews, and related entities. Create relationships (master-detail, lookup, junction), record types, page layouts, compact layouts, and ensure the model supports reporting and automation.

### 1. Create Custom Objects (core objects)

**Purpose:** Create objects to store recruitment data.

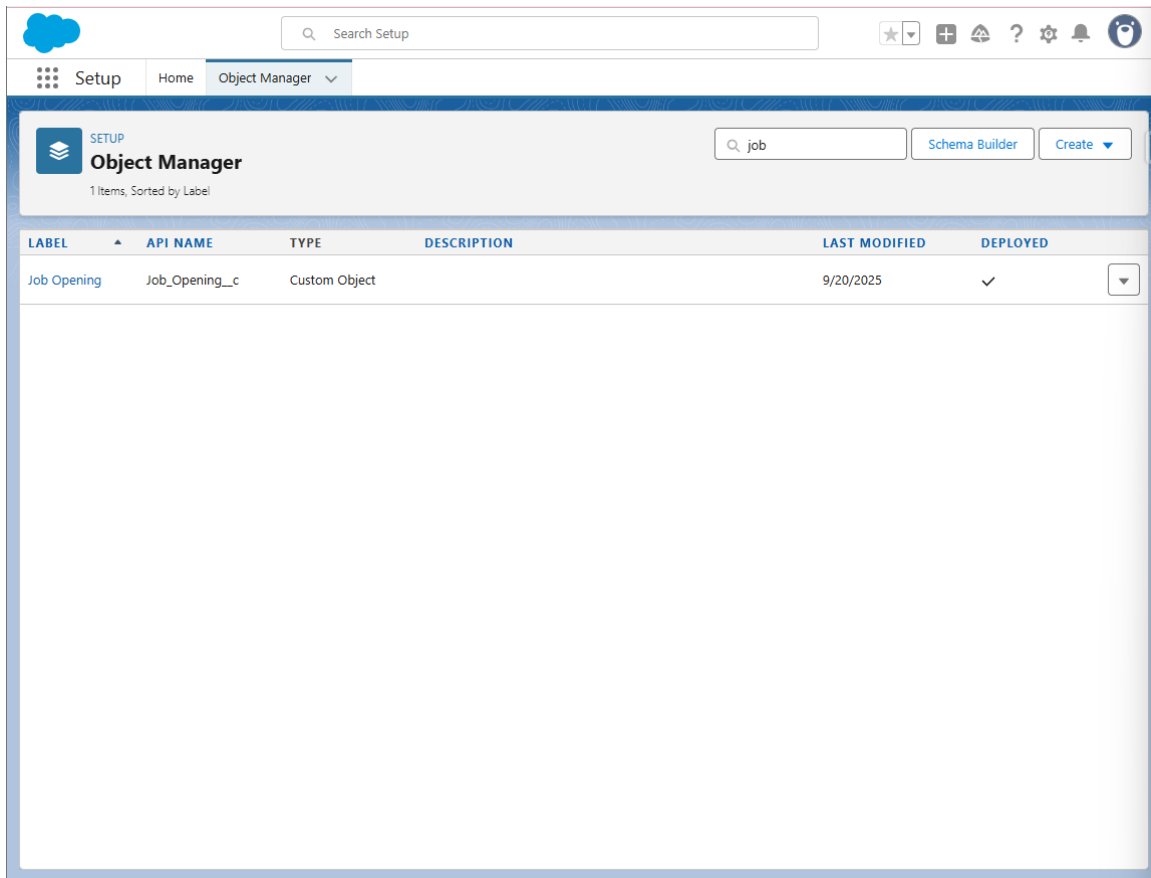
#### Objects to create (recommended):

- **Job\_Opening\_\_c** — stores job requisitions.
- **Candidate\_\_c** — stores candidate profile & contact info.
- **Application\_\_c** — *junction object* between Candidate and Job Opening (one candidate can apply to many jobs, one job can have many candidates).
- **Interview\_\_c** — interview records linked to Application (or Candidate).
- **Resume\_\_c** (optional) — file/reference to candidate resume or parsed data.

#### Steps (example for Job\_Opening\_\_c):

1. Click **Setup** → enter **Object Manager** in Quick Find → **Object Manager**.
2. Click **Create** → **Custom Object**.
3. For **Label** enter: Job Opening  
**Plural Label:** Job Openings  
**Object Name (API):** Job\_Opening\_\_c  
**Record Name:** Job Opening Name (Auto-Number or Text)
4. Check **Allow Reports**, **Allow Activities**, and **Track Field History** (as needed).
5. Click **Save**.

Repeat the same for **Candidate\_\_c**, **Application\_\_c**, **Interview\_\_c**, etc.



## 2. Add Fields to Objects (detailed examples)

**General:** For each object, create fields with clear API names and types.

### **Job\_Opening\_\_c — suggested fields**

- Job\_Code\_\_c — Auto Number JOB-{0000}
- Job\_Title\_\_c — Text (255)
- Department\_\_c — Picklist (e.g., Sales, Engineering, HR, Finance)
- Hiring\_Manager\_\_c — Lookup(User)
- Positions\_Open\_\_c — Number (Integer)
- Status\_\_c — Picklist (Draft, Open, Closed, On Hold)
- Location\_\_c — Text or Picklist
- Salary\_Range\_Low\_\_c & Salary\_Range\_High\_\_c — Currency

### **Candidate\_\_c — suggested fields**

- FirstName\_\_c, LastName\_\_c — Text (or use Contact standard object)
- Email\_\_c — Email (Required)
- Phone\_\_c — Phone
- Resume\_Link\_\_c — URL or File (use Files)
- Source\_\_c — Picklist (LinkedIn, Referral, Job Portal, Walk-in)
- Current\_Status\_\_c — Picklist (Applied, Screened, Interview, Offered, Hired, Rejected)
- Current\_Score\_\_c — Number (3,1) — optional scoring field.

### **Application\_\_c (junction between Candidate & Job)**

- Candidate\_\_c — Master-Detail → Candidate\_\_c
- Job\_Opening\_\_c — Master-Detail → Job\_Opening\_\_c
- Application\_Date\_\_c — Date
- Stage\_\_c — Picklist (Applied, Screening, Interviewing, Offer, Hired, Rejected)
- Resume\_Attached\_\_c — Checkbox

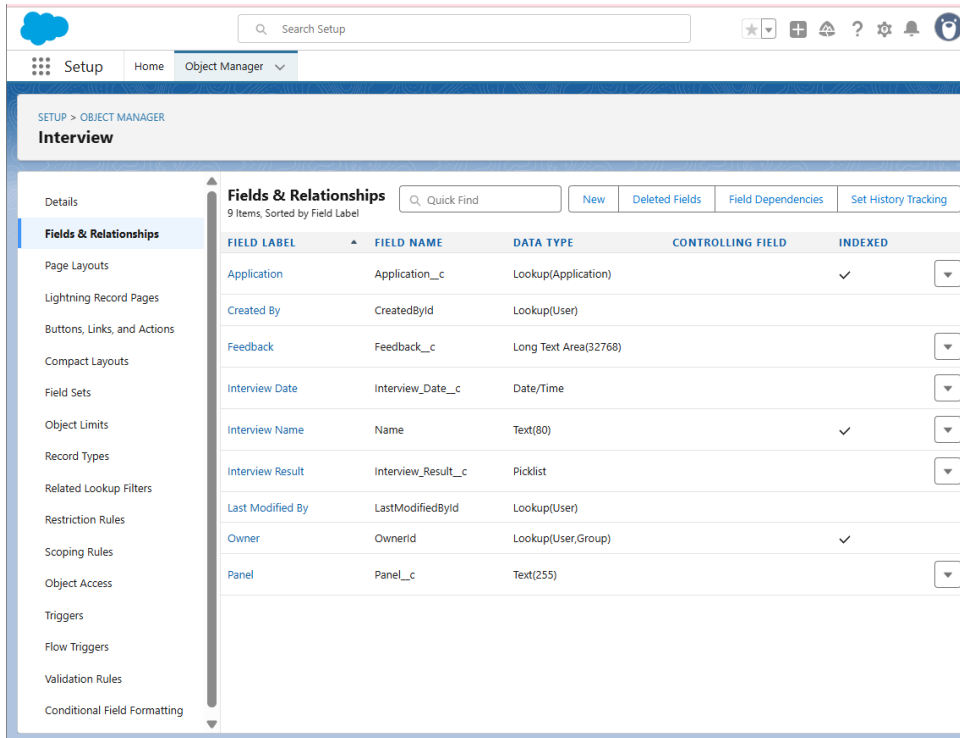
### **Interview\_\_c**

- Application\_\_c — Lookup(Application\_\_c) or Master-Detail to Application
- Interview\_Date\_\_c — Date/Time
- Panel\_\_c — Text / Related Users (could be a multi-select picklist of panel members or create Interview\_Panel\_\_c child records)
- Feedback\_\_c — Long Text Area
- Interview\_Result\_\_c — Picklist (Pass, Fail, Hold)

### **Steps to add a field (example Email on Candidate\_\_c):**

1. Setup → Object Manager → open **Candidate** → **Fields & Relationships** → **New**.
2. Choose **Email** type → Next.

Field Label: Email → Field Name: Email\_\_c → Set **Required** if desired → Next → Set field-level security → Next → Add to Page Layouts → Save.



### 3. Create Relationships (lookup, master-detail, junction)

#### When to use which:

- **Master-Detail:** Use when child record should inherit parent sharing and be deleted when parent deleted (e.g., Application as master-detail both Candidate & Job).
- **Lookup:** Use when child should be independent (e.g., Interview may be a lookup to Application if you want interviews to survive application deletion).
- **Junction Object:** Use Application\_\_c to model many-to-many between Job and Candidate.

#### Step to create a Master-Detail (Application → Candidate):

1. Setup → Object Manager → **Application** → **Fields & Relationships** → **New**.
2. Choose **Master-Detail Relationship** → Next.
3. Related To: **Candidate** → Next.
4. Field Label: Candidate → Field Name: Candidate\_\_c → Next → Set sharing and behavior → Save.
5. Repeat for **Job\_Opening** master-detail.

**Result:** Application now shows as related list on both Candidate and Job Opening pages.

The screenshot shows the Salesforce Setup interface for the 'Candidate' custom field definition. The left sidebar contains a navigation menu with options like Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area is titled 'Application Custom Field Candidate' and includes a 'Back to Application' link. It features tabs for 'Custom Field Definition Detail' (selected), 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab shows 'Field Information' with fields like Field Label (Candidate), Field Name (Candidate), API Name (Candidate\_\_c), Object Name (Application), and Data Type (Master-Detail). It also displays 'Master-Detail Options' with fields like Related To (Candidate), Child Relationship Name (Applications), and a 'Reparentable Master Detail' checkbox. A 'Lookup Filter' section indicates 'No lookup filters defined.' At the bottom, there is a 'Validation Rules' section with a 'New' button and a message 'No validation rules defined.' The page footer includes a 'Back To Top' link and a note 'Always show me more records per related list'.

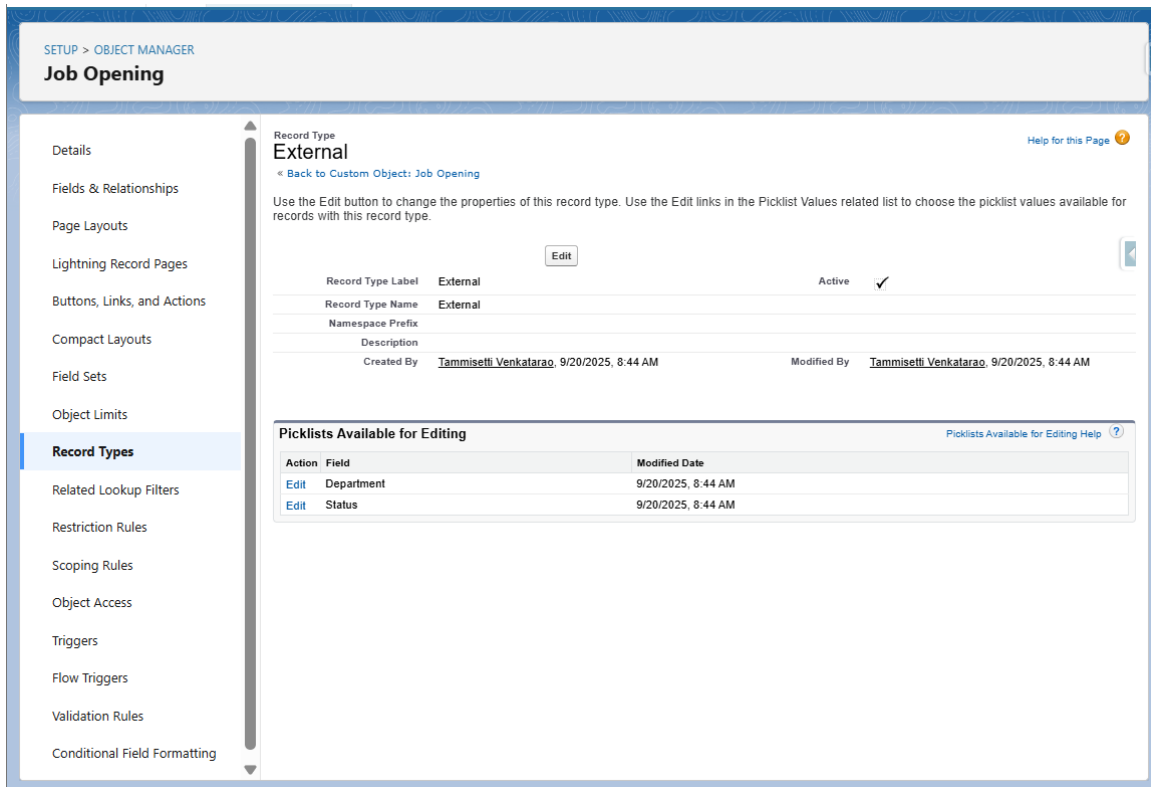
#### 4. Create Record Types & Picklist Variants

**Use case:** Show different fields or page layouts for **Internal Hiring vs External Hiring or Referral vs Open Application**.

##### Steps:

1. Setup → Object Manager → **Job Opening** → **Record Types** → **New**.
2. Select existing profile defaults to clone.
3. Enter Record Type Label: Internal and API name: Internal.
4. Repeat to create External.
5. For each Record Type, assign Page Layouts and set picklist value availability.

**Tip:** Use record types when fields, picklist values, or required fields differ by hiring type.



## 5. Page Layouts & Compact Layouts

**Page Layouts** control detail page appearance; **Compact Layouts** control highlights on record cards & mobile.

### Create/Edit Page Layout:

1. Setup → Object Manager → Job Opening → **Page Layouts** → **New** (or edit existing).
2. Drag/Drop fields, Related Lists (Applications, Interviews), Buttons.
3. Save.
4. Assign page layout to profiles and record types (Page Layout Assignment).

### Create Compact Layout:

1. Setup → Object Manager → Job Opening → **Compact Layouts** → **New**.
2. Choose fields shown in the highlights panel (Job Title, Status, Hiring Manager).

Save → Set as the org default or assign by record type.

SETUP > OBJECT MANAGER

Job Opening

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Applications

Mini Page LayoutMini Console ViewVideo TutorialHelp for this Page

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find

Field Name

\*

Section

Hiring Manager

Last Modified By

Record Type

Blank Space

Job Code

Location

Salary Range High

Created By

Job Opening Name

Owner

Salary Range Low

Department

Job Title

Positions Open

Status

Job Opening Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce

Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning

Experience Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Job Opening Detail

Standard Buttons

SETUP > OBJECT MANAGER

Job Opening

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Job Opening Compact Layout

Job Title

Back to Job Opening

Compact Layout Detail

EditCloneDeleteCompact Layout Assignment

Label

Job Title

Object Name

Job Opening

API Name

Job\_Title

Included Fields

Job Title

Status

Hiring Manager

Created By

Tammiseti Venkatarao

9/20/2025, 8:53 AM

Modified By

Tammiseti Venkatarao

9/20/2025, 8:53 AM

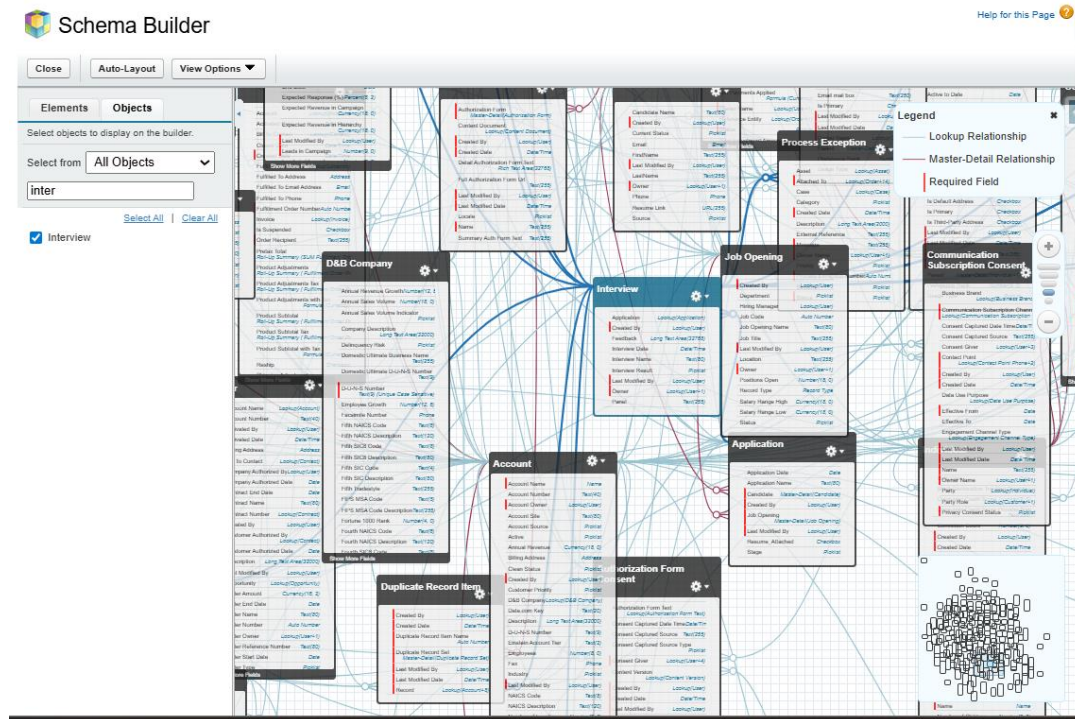
EditCloneDeleteCompact Layout Assignment

## 6. Schema Builder (visualize & adjust)

### Steps:

1. Setup → enter **Schema Builder** in Quick Find → **Schema Builder**.
2. From the left pane, check the objects you created (Job\_Opening, Candidate, Application, Interview).
3. Drag objects onto canvas to view relationships.
4. You can also create fields or relationships from Schema Builder (click on object → Add field).

Use it to verify your ERD and to export/interpret model when writing documentation.

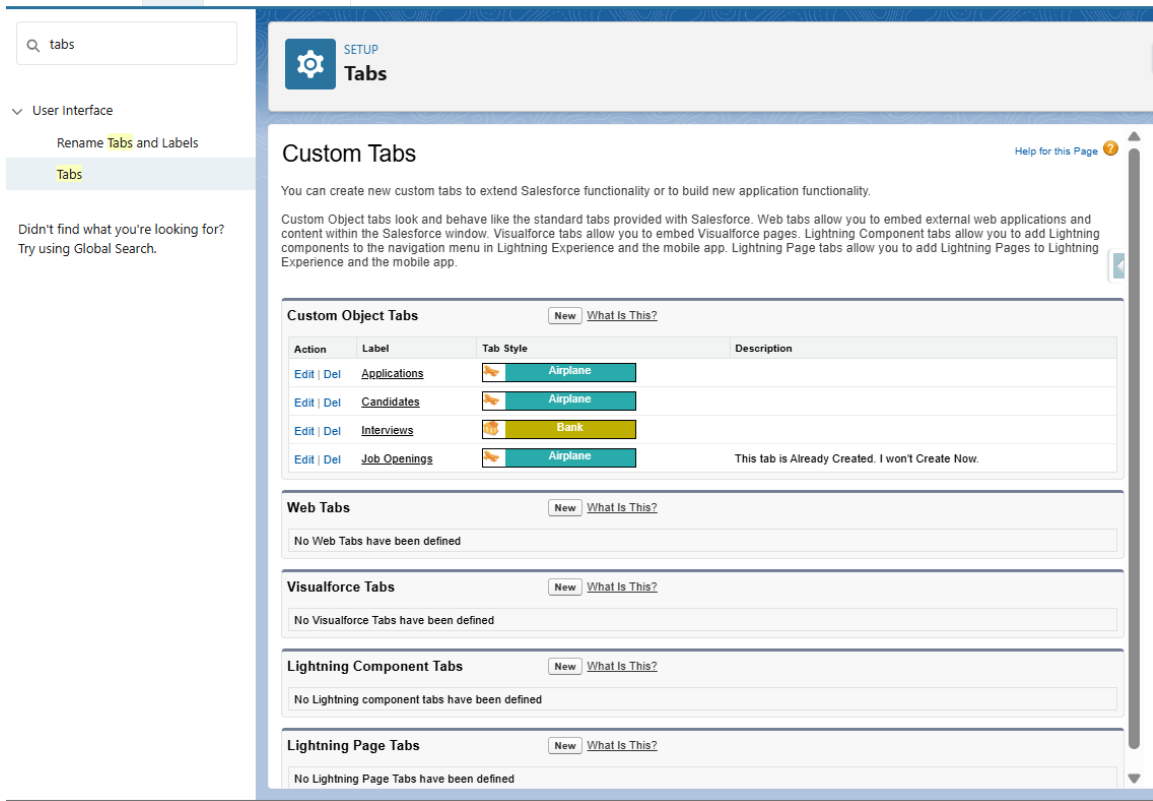


## 7. Create Tabs & Add to App

### Steps:

1. Setup → Quick Find → **Tabs** → **New** (Custom Object Tabs).
2. Select **Job Opening** → Choose tab style → Next → Add to desired Apps (Recruitment App) → Save.
3. Repeat for Candidate and Application.

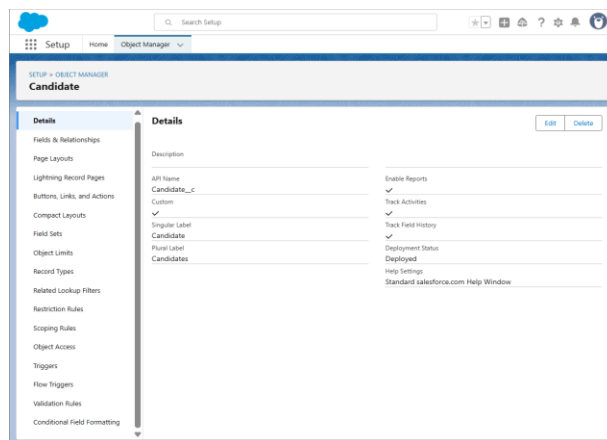




## 8. Search Layouts & List Views

- Setup → Object Manager → Candidate → **Search Layouts for Salesforce Classic / Search Layouts for Lightning Experience** → Configure fields that show in search results.

Create List Views for hiring managers: e.g., Open Applications, Interviews Today, Offers Pending.



## 9.Validation Rules (examples)

### Example 1 — Require Email or Phone for Candidate:

- Setup → Object Manager → Candidate → **Validation Rules** → **New**.
- Rule Name: Require\_Email\_or\_Phone
- Formula:

AND( ISBLANK( Email\_\_c ), ISBLANK( Phone\_\_c ) )

Error Message: Either Email or Phone must be provided. → Error Location: Top of Page  
→ Save.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, **Validation Rules**, and Conditional Field Formatting. The main content area is titled 'Candidate' and 'Validation Rules'. It shows a table with 1 item, sorted by Rule Name. The table has columns: RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The row shows 'Require\_Email' as the rule name, 'Top of Page' as the error location, 'Either Email or Phone must be provided. → Error Location: Top of Page → Save.' as the error message, and 'Tammisetti Venkatarao, 9/20/2025, 9:12 AM' as the modified by. There is a 'New' button in the top right corner of the table.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Require_Email	Top of Page	Either Email or Phone must be provided. → Error Location: Top of Page → Save.	✓	Tammisetti Venkatarao, 9/20/2025, 9:12 AM

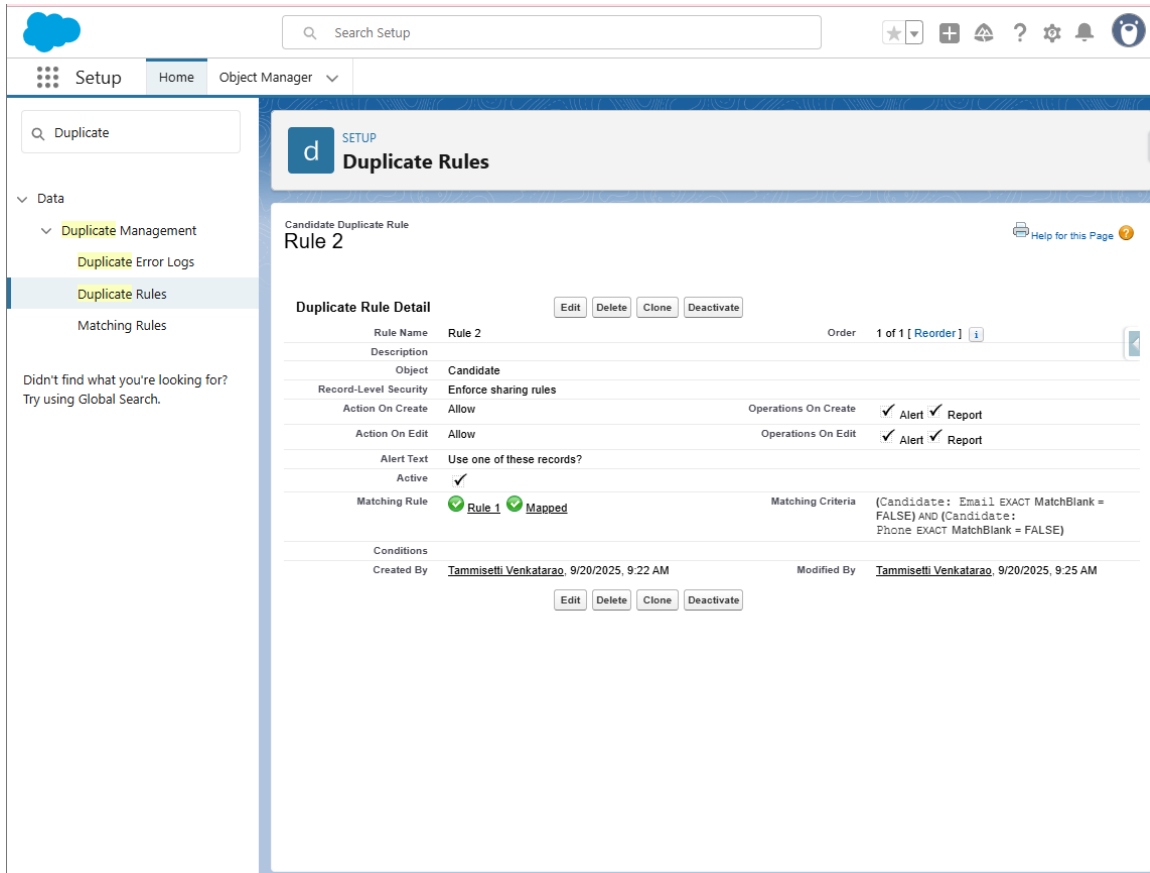
## 10.Duplicate Management (Matching & Duplicate Rules)

### Create Matching Rule (Candidate by Email & Phone):

1. Setup → Quick Find: **Matching Rules** → **New Rule**.
2. Object: Candidate. Matching Criteria: Email (Exact), Phone (Exact).
3. Save → Activate.

## Create Duplicate Rule:

1. Setup → Quick Find: **Duplicate Rules** → **New Rule**.
2. Object: Candidate. Rule Type: Use the matching rule just created.
3. Action on Create/Edit: Block or Allow and Report (choose Allow and Report during testing).
4. Save → Activate.



## 11.Import Sample Data

### Small import (Data Import Wizard):

1. Setup → Quick Find → **Data Import Wizard** → Launch Wizard.
2. Choose object: Candidates (or Accounts/Contacts if using Contact).
3. Upload CSV file with mapped headers (FirstName, LastName, Email, Phone, Source).
4. Map CSV columns to Salesforce fields → Start Import.
5. Review import results.

The screenshot shows the Salesforce Setup interface. On the left, there's a navigation menu with 'Setup', 'Home', and 'Object Manager'. Below this is a search bar for 'Data import' and a section for 'Integrations' with a 'Data Import Wizard' link. The main content area is titled 'Bulk Data Load Jobs' and shows details for a specific job: '750gL00000DnuWG'. The job details include a table with various metrics such as Job ID, Submitted By, Start Time, End Time, Time to Complete, Object, External ID Field, Content Type, Concurrency Mode, API Version, Job Type, Bulk V1, Operation, Status, and Closed. Below the job details is a 'Batches' table showing a single batch with its own set of metrics.

Bulk Data Load Job Detail											
Job ID	750gL00000DnuWG			Job Type	Bulk V1			Status	Closed		
Submitted By	Tammisetti Venkatarao			Operation	Insert			Total Processing Time (ms)	192		
Start Time	9/20/2025, 9:50 AM PST			Queued Batches	0			API Active Processing Time (ms)	118		
End Time	9/20/2025, 9:50 AM PST			In Progress Batches	0			Apex Processing Time (ms)	39		
Time to Complete (hh:mm:ss)	00:00			Completed Batches	1						
Object	Candidate			Failed Batches	0						
External ID Field				Progress	100%						
Content Type	CSV			Records Processed	4						
Concurrency Mode	Parallel			Records Failed	0						
API Version	64.0			Retries	0						

Batches										
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count
<a href="#">View Request</a>	<a href="#">View Result</a>	751gL00000BQG1B	9/20/2025, 9:50 AM	9/20/2025, 9:50 AM	192	118	39	4	0	0

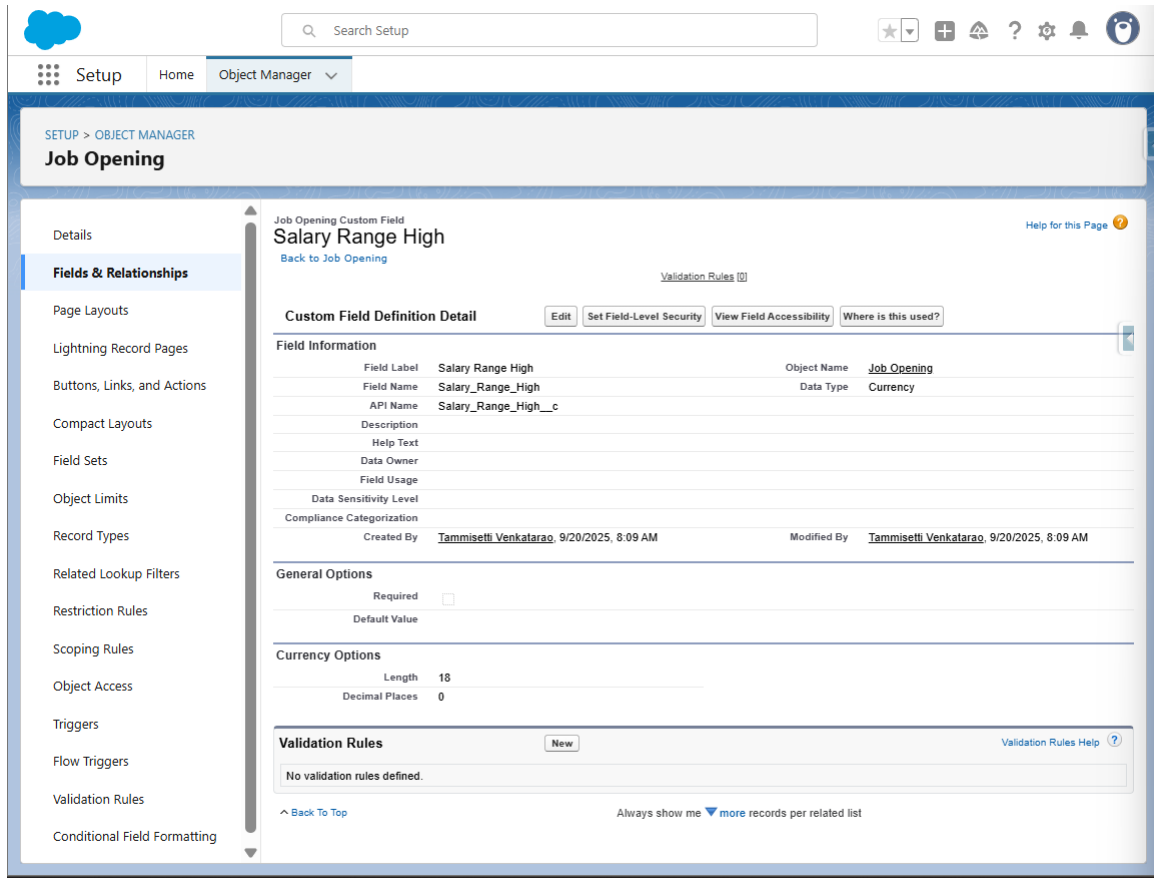
## Large imports (Data Loader):

- Use Data Loader to insert Application records or historical data; map lookup fields using external IDs or Salesforce IDs.

**Tip:** For Master-Detail relationships during import, either import parent records first (Candidate, Job) and use their Salesforce IDs in child records, or use External ID fields to match.

## 12.Security for Objects & Fields

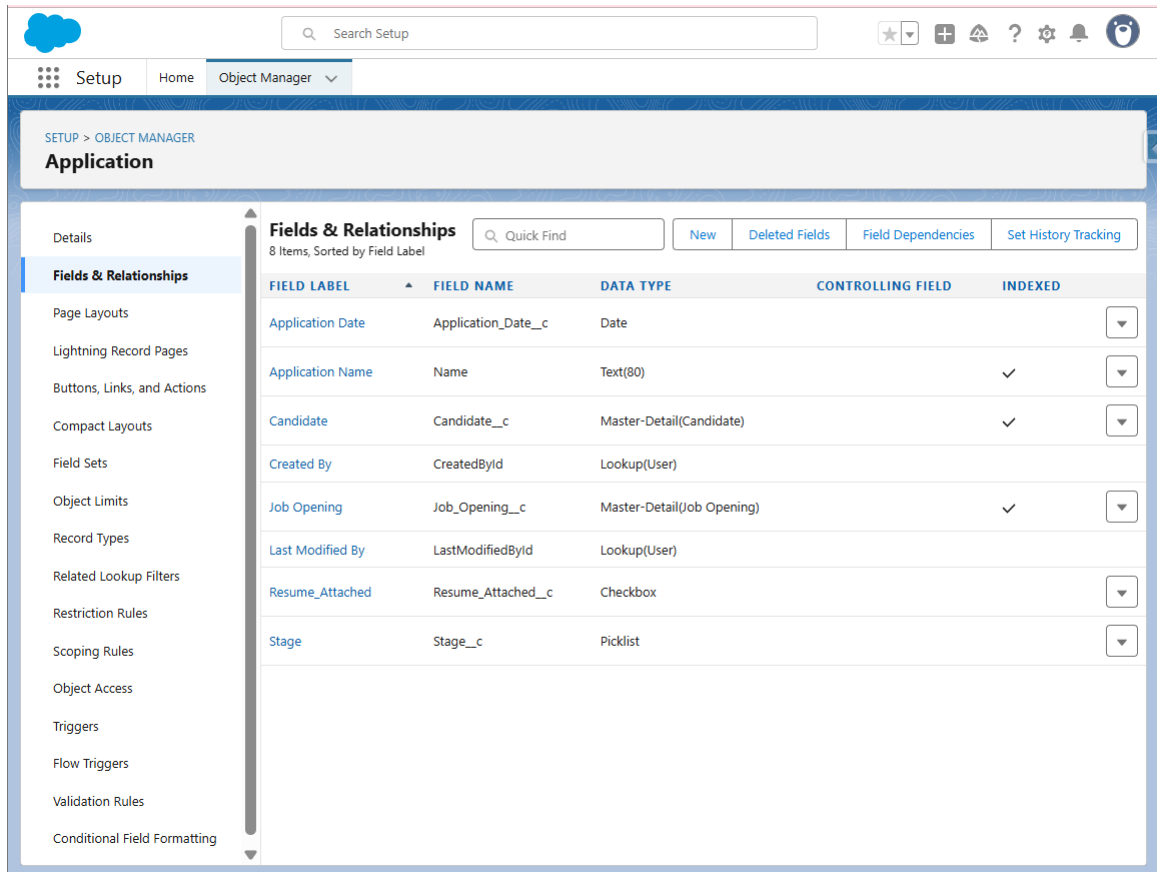
- For each sensitive field (e.g., Salary\_Range), set **Field-Level Security**: Setup → Object Manager → Field → **Set Field-Level Security** — hide for recruiter if needed.
- Use **Permission Sets** to grant special access to certain users.



### 13. Use a Junction Object for Many-to-Many (Application example)

**Why Application\_\_c:** A Candidate can apply to multiple Job Openings and each Job Opening can have many Candidates.

- Create Application\_\_c → two master-detail fields: Candidate\_\_c and Job\_Opening\_\_c.
- This makes Applications appear in related lists on both Candidate and Job Opening pages and supports per-application stages.



## Documenting the Model & Deliverables

### Deliverables for Phase 3:

- ERD (Entity Relationship Diagram) — can export from Schema Builder or draw in Visio/Miro.
- Object & field dictionary (table with Field Label, API Name, Type, Description, Required?).
- Record Type list & page layout assignment matrix (which profile sees which layout).
- Validation rules list with formulas and purpose.
- Duplicate/matching rules configuration.
- Sample CSV files used to import test data and import logs.
- Screenshots of key configurations (Object Manager, schema builder, page layout).

## Phase 4: Process Automation (Admin)

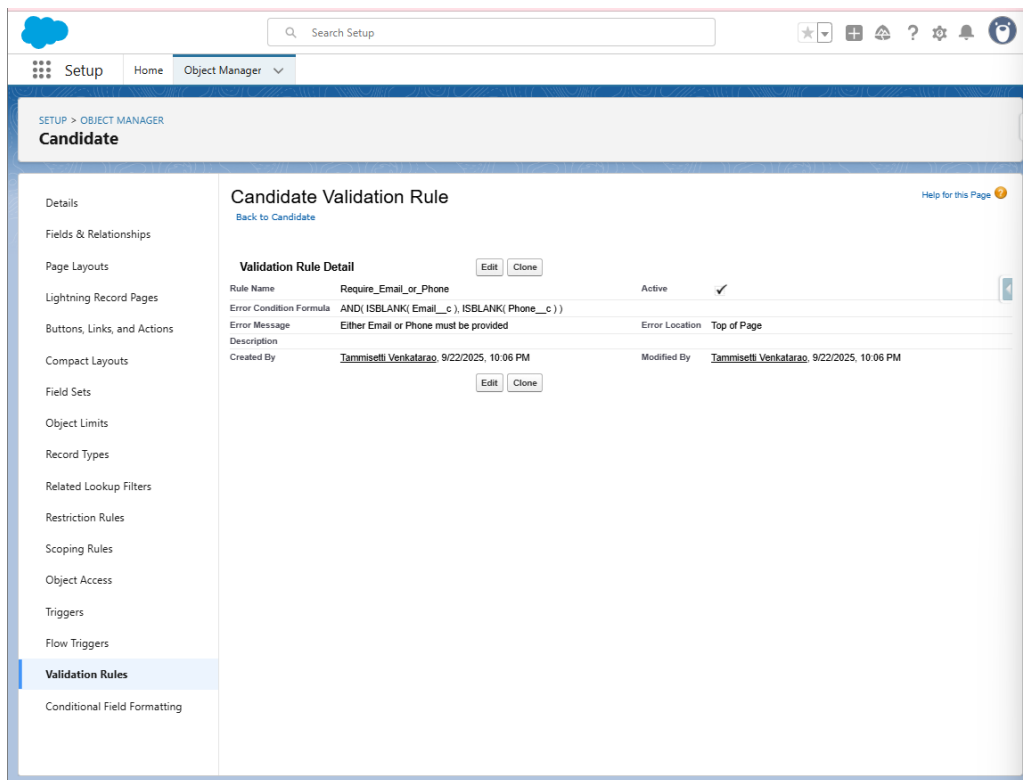
### Goal:

Automate recruitment workflows using declarative Salesforce tools (Validation Rules, Flows, Approval Processes, Email Alerts, Tasks, and Scheduled Automations). Ensure automations are maintainable, tested in Sandbox, and documented.

### 1) Validation Rules (examples)

#### Example A — Require Email OR Phone on Candidate

1. Click **Setup** → **Object Manager** → **Candidate** → **Validation Rules** → **New**.
2. Rule Name: `Require_Email_or_Phone`
3. Error Condition Formula:  
$$\text{AND}(\text{ISBLANK}(\text{Email\_c}), \text{ISBLANK}(\text{Phone\_c}))$$
4. Error Message: Either Email or Phone must be provided.
5. Error Location: **Top of Page** → **Save**.



## 2) Create Email Templates & Alerts (prepare first)

### Create a Lightning Email Template (Congratulate Hired)

1. App Launcher → **Email Templates** → **New Email Template**.

2. Name: Candidate\_Hired\_Congrats

3. Related Entity Type: **Application** (or Candidate)

4. Subject: Congratulations — Offer Accepted for  
{!Application\_\_c.Job\_Opening\_\_r.Job\_Title\_\_c}

5. Body (example):

Hi {!Application\_\_c.Candidate\_\_r.FirstName},

Congratulations! Your application for  
{!Application\_\_c.Job\_Opening\_\_r.Job\_Title\_\_c} has been successful.

Your expected joining date: {!Application\_\_c.Joining\_Date\_\_c}.

HR Manager: {!User.FirstName} {!User.LastName}

6. Save.

The screenshot shows the Salesforce Lightning interface for creating an email template. The top navigation bar includes a search bar and various utility icons. The main header shows the current page is 'Candidate Hired Congrats' under the 'Email Template' section. The 'Details' tab is active, displaying the following information:

Information	
Email Template Name	Candidate Hired Congrats
Description	Email sent to candidate when an offer is accepted
Made in Email Template Builder	<input type="checkbox"/>
Related Entity Type	Application
Folder	Public Email Templates

Message Content	
Subject	Enhanced Letterhead
HTML Value	

Additional Information	
Created By	Tammisetti Venkatarao, 9/21/2025, 7:06 AM
Last Modified By	Tammisetti Venkatarao, 9/21/2025, 7:10 AM



## Create an Email Alert to use in Flows

1. Setup → **Email Alerts** → **New Email Alert**.
2. Description: Send Congratulation to Candidate on Hired
3. Object: **Application**
4. Email Template: Candidate\_Hired\_Congrats
5. Recipient Type: Related Contact / Email Field → choose Candidate Email (or related Contact)
6. Save.

The screenshot shows the Salesforce Setup interface for Email Alerts. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Email Alerts' and displays details for a specific alert named 'Send Congratulation to Candidate on Hired'. The details include the description, unique name, from email address, recipients, and creation/modification information. Below the details are sections for 'Rules Using This Email Alert', 'Approval Processes Using This Email Alert', 'Entitlement Processes Using This Email Alert', and 'Flows Using This Email Alert'. The 'Flows Using This Email Alert' section shows a table with columns for Flow Name, Version, Description, Object, and Active status.

**Email Alert Detail**

Field	Value
Description	Send Congratulation to Candidate on Hired
Unique Name	Send_Congratulation_to_Candidate_on_Hired
From Email Address	Current User's email address
Recipients	
Additional Emails	tammisettilivenkatrao53@gmail.com
Created By	Tammisettil Venkatarao, 9/21/2025, 7:13 AM
Modified By	Tammisettil Venkatarao, 9/21/2025, 7:13 AM

**Rules Using This Email Alert**

This alert is currently not used by any rules

**Approval Processes Using This Email Alert**

This alert is currently not used by any approval processes

**Entitlement Processes Using This Email Alert**

This alert is currently not used by any entitlement processes

**Flows Using This Email Alert**

Flow Name	Version	Description	Object	Active
-----------	---------	-------------	--------	--------

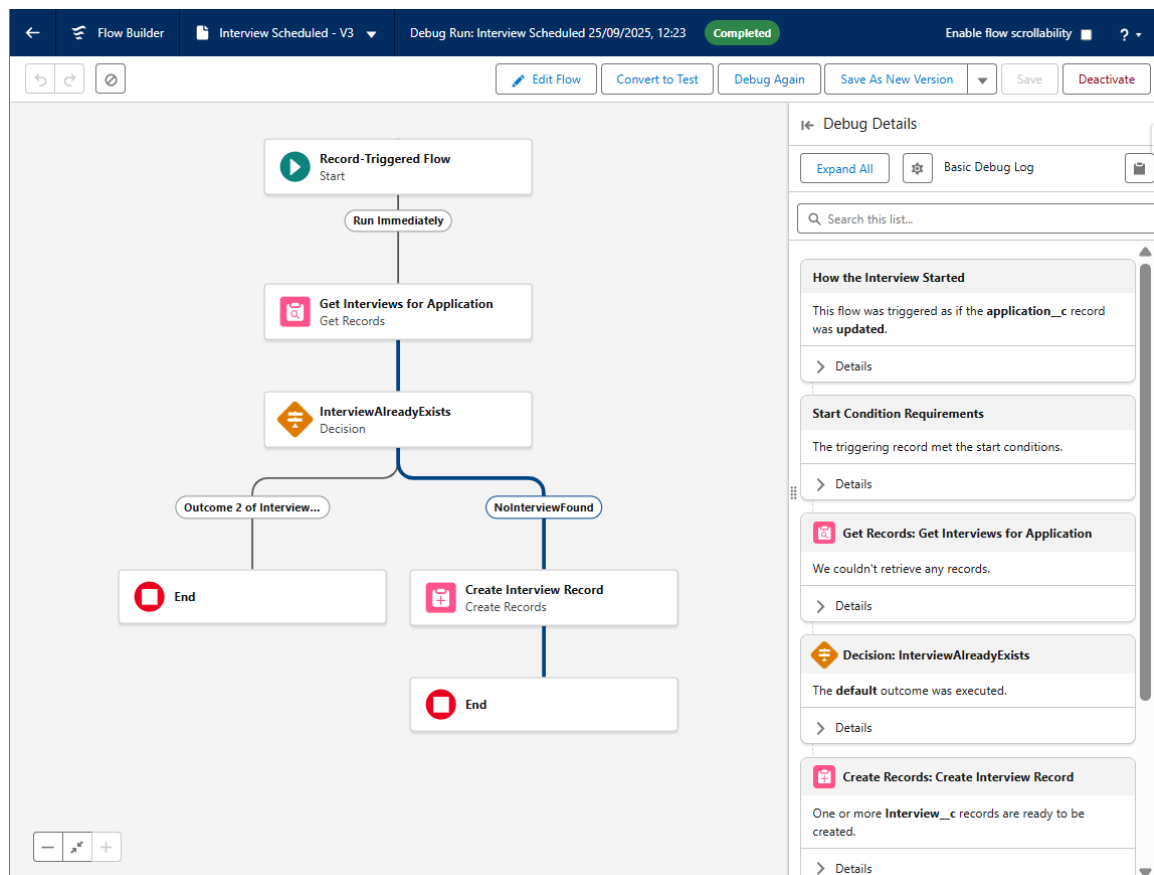
Always show me [more](#) records per related list

## 3) Record-Triggered Flow: Auto-create Interview when Stage = Interview Scheduled

1. Setup → **Flows** → **New Flow** → **Record-Triggered Flow**.
2. Object: **Application\_\_c**. Trigger: **A record is updated**.

3. Entry Condition: Stage\_\_c Equals Interview Scheduled. Optimize for: **Actions and Related Records**.
4. (Optional) Add **Decision**: InterviewAlreadyExists? to prevent duplicates.
5. Add **Create Records**: Object = **Interview\_\_c**. Map fields:
  - Application\_\_c = \$Record.Id
  - Interview\_Date\_\_c = \$Record.Interview\_Date\_\_c
  - Interview\_Result\_\_c = Scheduled
  - Panel\_\_c = \$Record.Panel\_\_c
6. (Optional) Add **Send Email Alert** or **Send Custom Notification** to notify panel/recruiter.
7. Save → Name: AutoCreateInterview\_On\_InterviewScheduled → **Activate**.

**Test:** In Sandbox, update an Application to Stage = Interview Scheduled; verify Interview appears in related list and notification/email is received.



Interview  
**a03gL00000D9gPQ**

[New Contact](#)
[Edit](#)
[New Opportunity](#)

Related

Details

Interview Name

a03gL00000D9gPQ

Application

[Java Developer](#)

Interview Date

9/24/2025, 5:00 PM

Panel

Venkatrao

Feedback

Interview Result

Created By

[Tammiseti Venkatarao](#)

9/24/2025, 11:55 PM

Last Modified By

[Tammiseti Venkatarao](#)

9/24/2025, 11:57 PM

Owner

[Tammiseti Venkatarao](#)

Activity

Calendar

Tasks

WhatsApp

Email

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

#### 4) Record-Triggered Flow: Auto-create Task for Recruiter on Stage = Screening

1. Setup → Flows → New → Record-Triggered Flow.
2. Object: **Application\_\_c** → Trigger when record is created or updated.
3. Entry Condition: Stage\_\_c Equals Screening.
4. Add **Create Records** → Object: **Task**. Fields:
  - Subject: Screen Candidate - { !\$Record.Candidate\_\_r.Name }
  - WhoId / WhatId: set to Candidate or Application as appropriate
  - OwnerId: \$Record.OwnerId (or specific recruiter)
  - Status: Not Started
  - Priority: Normal
5. Save & Activate.

**Test:** Change Stage to Screening → confirm Task appears under related Tasks.

Flow Builder

Creation New Task - V1

Your automation was activated.

?

↩

↶

⊗

Edit Flow

Convert to Test

Debug Again

Save As New Version

Save

Deactivate

Record-Triggered Flow

Start

Run Immediately

Task

Create Records

End

Debug Details

Expand All

Basic Debug Log

Search this list...

How the Interview Started

This flow was triggered as if the **application\_c** record was **updated**.

Details

Start Condition Requirements

The triggering record met the start conditions.

Details

Create Records: Task

One or more **Task** records are ready to be created.

Details

Rollback

Details

How the Interview Finished

Details

The flow interview ran for 0.83 seconds and finished on 25 September 2025 at 12:51.

Salesforce

Search...

Star

Grid

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Applications

More

Application

Salesforce

New Contact

Edit

New Opportunity

Related

Details

Application Name

Salesforce

Candidate

Gopi

Job Opening

Salesforce

Application Date

9/25/2025

Stage

Screening

Resume\_Attached

Created By

Tammiseti Venkatarao, 9/24/2025, 10:07 AM

Last Modified By

Tammiseti Venkatarao, 9/25/2025, 12:22 AM

Activity

Calendar

Tasks

Messages

Filters: All time • All activities • All types

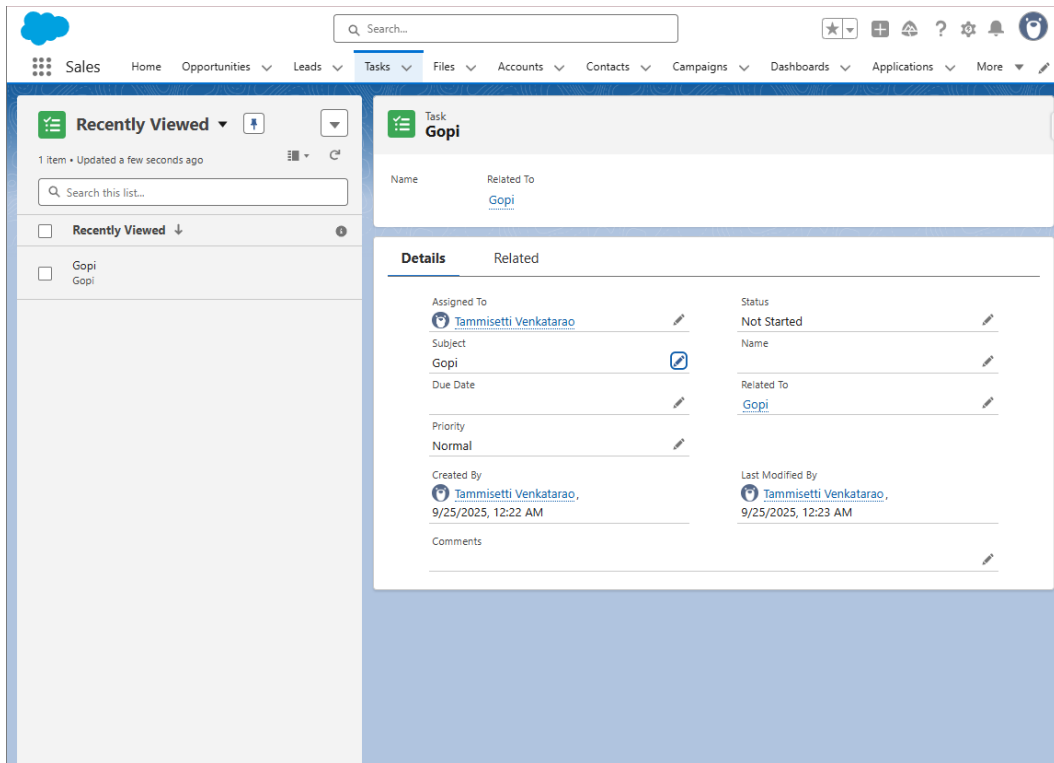
Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

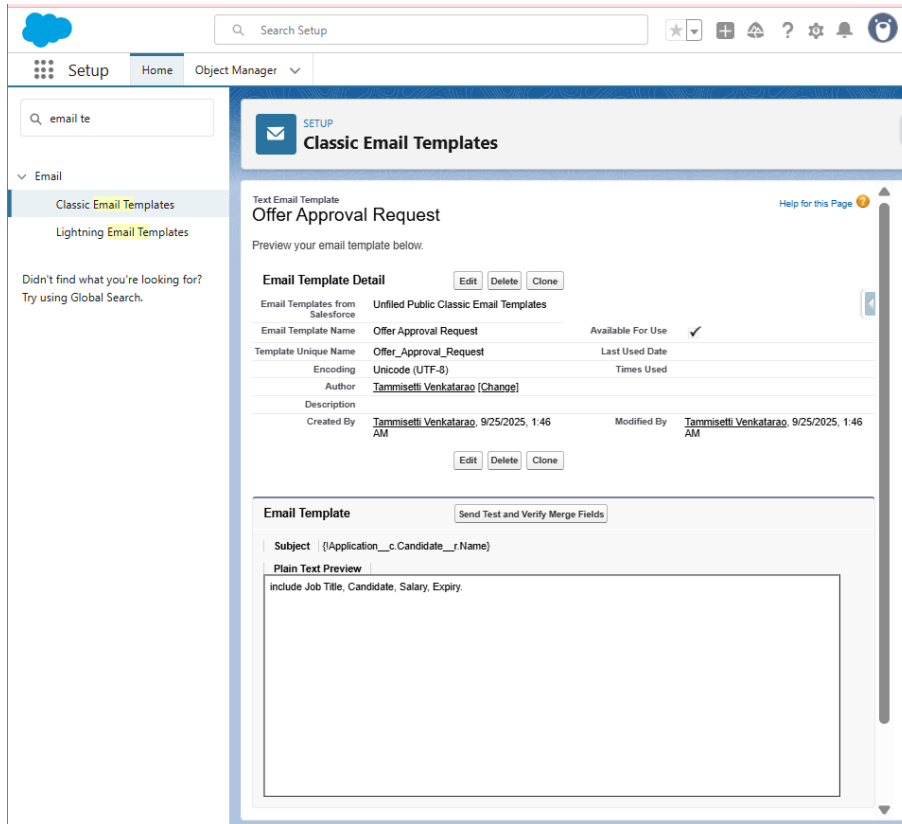
No past activity. Past meetings and tasks marked as done show up here.



## 5) Approval Process: Offer Approval (Department Head)

### Create Email Template (Offer Approval Request)

1. Setup → Email Templates → New Email Template.
  - Name: Offer\_Approval\_Request
  - Subject: Approval Required: Offer for {!Application\_\_c.Candidate\_\_r.Name}
  - Body: include Job Title, Candidate, Salary, Expiry.
2. Save.



## Create Approval Process

1. Setup → **Approval Processes** → Select object **Application** → **Create New Approval Process** → Standard Wizard.
2. Name: Offer Approval Process.
3. Entry Criteria: `ISPICKVAL(Stage__c, "Offer")` (or add threshold: `AND(ISPICKVAL(Stage__c, "Offer"), Salary_Offered__c > 50000)`).
4. Approver: Record Owner's Manager or a specified Department Head.
5. Initial Submitters: Application Owner.
6. Initial Submission Actions: Field Update → `Approval_Status__c = Pending`.
7. Final Approval Actions: Field Update → `Offer_Status__c = Approved`; Send Email Alert to Candidate.
8. Final Rejection Actions: Field Update → `Offer_Status__c = Rejected`; Send Email Alert.
9. Activate Approval Process.

**Optional:** Create a Record-Triggered Flow that submits the Application for approval automatically when Stage changes to Offer.

**Test:** Move Application Stage to Offer → approver receives email and can approve or reject; check field updates.

**Approval Processes**

Unique Name	Offer_Approval_Process	Next Automated Approver Determined By	Manager of Record Owner
Description			
Entry Criteria	ISPICKVAL(Stage__c, "Offer")		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	Offer Approval Request		
Initial Submitters	Candidate Owner		
Created By	Tammiseti Venkatarao, 9/25/2025, 2:05 AM	Modified By	Tammiseti Venkatarao, 9/25/2025, 2:05 AM

**Initial Submission Actions**

Action	Type	Description
Record Lock		Lock the record from being edited

**Approval Steps**

You have not yet defined any approval steps

**Final Approval Actions**

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

**Final Rejection Actions**

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

**Recall Actions**

Action	Type	Description
Record Lock		Unlock the record for editing

## 6) Scheduled Path in Record-Triggered Flow (Reminders / SLA)

**Use case:** Remind recruiter/candidate 3 days before Offer expiry or remind if no response.

1. Create Record-Triggered Flow on **Application\_\_c** (trigger on create or update).
2. Add **Scheduled Path**: Run after Offer\_Expiry\_Date\_\_c - 3 Days.
3. In scheduled path add **Decision**: If Stage\_\_c = Offer AND Offer\_Accepted\_\_c = false, then **Create Task** or **Send Email Alert** to candidate & recruiter.
4. Save & Activate.

**Test:** Create an Application with Offer Expiry in near future and debug scheduled path or wait for execution.

The screenshot displays the Flow Builder interface. At the top, a green notification bar states "Your automation was activated." The main workspace shows a flow diagram with the following steps: "Record-Triggered Flow" (Start), "Run Immediately", "Task" (Create Records), and "End". The right sidebar, titled "Debug Details", contains a search bar and three expandable sections: "How the Interview Started" (explaining the flow was triggered by an update to application\_\_c), "Start Condition Requirements" (stating the triggering record didn't meet the start conditions), and "How the Interview Finished" (reporting the flow ran for 2.99 seconds and finished on 25 September 2025 at 14:45).

## 7) Auto-update Job Opening Positions (Roll-up)

### Option A — Roll-Up Summary (if Master-Detail exists)

1. If Application\_\_c is master-detail to Job\_Opening\_\_c, create **Roll-Up Summary** on Job\_Opening\_\_c:
  - Summarized Object: Application\_\_c
  - Roll-up Type: COUNT where Stage\_\_c = Hired.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays the 'Job Opening' object with a custom field named 'Number of Hired Applications'. The field details include its label, name, API name, and description. The 'Roll-Up Summary Options' section shows the field is a roll-up summary of the 'Application' object, with the filter criteria 'Stage EQUALS Hired'.

Job Opening Custom Field  
**Number of Hired Applications**  
[Back to Job Opening](#) [Help for this Page](#)

**Custom Field Definition Detail** [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

**Field Information**

Field Label	Number of Hired Applications	Object Name	Job Opening
Field Name	Number_of_Hired_Applications		
API Name	Number_of_Hired_Applications__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Tammiseti Venkatarao, 9/25/2025, 2:25 AM	Modified By	Tammiseti Venkatarao, 9/25/2025, 2:25 AM

**Roll-Up Summary Options**

Data Type	Roll-Up Summary	Summary Type	COUNT
Summarized Object	Application		
Filter Criteria	Stage EQUALS Hired		

**Test:** Mark Application as Hired → Job Opening counters update.

## 8) Auto-convert Leads to Candidates (incoming from LinkedIn / Site)

1. Create Record-Triggered Flow on **Lead** when Status = Closed - Converted or a custom checkbox `Convert_to_Candidate__c` = true.
2. Add **Create Records** → Object: **Candidate\_\_c**. Map fields from Lead: FirstName, LastName, Email, Phone, Source = LinkedIn.
3. Optionally create **Application\_\_c** to link Candidate → Job\_Opening if Lead included interested job.
4. Update Lead to mark converted. Save & Activate.

**Note:** For robust lead conversion (account/contact/opportunity creation) consider Apex Database.LeadConvert or an invocable Apex class.

## 9) Subflows (Reusable) & Best Practices

- Create reusable subflows for repeated actions (e.g., Notify\_Recruiter\_Subflow to send email & custom notification).
- Name flows clearly and add descriptions (purpose, owner, inputs/outputs).
- Add **Fault Paths** on actions to log errors to a custom object (e.g., Flow\_Error\_\_c) for admin review.
- Avoid heavy synchronous processing; for bulk operations use scheduled flows or Batch Apex.
- Test flows with bulk updates to ensure governor limits are respected.

The screenshot displays the Salesforce Flow Builder interface. At the top, a green notification banner states "Your automation was activated." The main workspace shows a flow diagram with three steps: "Autolaunched Flow Start", "Send Email Action", and "End". The right sidebar is titled "Debug Details" and shows a search bar and a list of debug logs. The first log entry is "How the Interview Started" with a "Details" link. The second log entry is "Send Email: Send Email Action" with a "Details" link. The third log entry is "How the Interview Finished" with a "Details" link. The bottom of the sidebar shows the flow execution summary: "The flow interview ran for 0.97 seconds and finished on 25 September 2025 at 18:12."

## 10) Send Custom Notifications (In-app)

1. Setup → **Notification Builder** → **Notification Types** → **New**.
  - Label: Recruitment\_Update → Save.
2. In Flow add **Action** → **Send Custom Notification**, select Recruitment\_Update, set title/body and recipient (e.g., recruiter or panel member).
3. Test: Notification shows in Salesforce bell icon and mobile app.

## 11) Test & Debug Flows

- Use **Debug** in Flow Builder to step through flow execution with sample input.
- Monitor **Paused and Failed Flow Interviews** (Setup → Paused & Failed Flow Interviews).
- Use **Debug Logs** (Setup → Debug Logs) especially when flows invoke Apex or platform events.
- Run bulk tests (update multiple records) to validate performance and bulk-safety.

## 12) Deployment of Flows & Automation

- In Sandbox: Create an **Outbound Change Set** → add Flows, Email Templates, Email Alerts, Approval Processes, Notification Types.
- Upload Change Set to Production. In Production, **Validate** and **Deploy**.
- Alternatively: use **SFDX / CI-CD** for version-controlled deployments.
- Post-deployment: run smoke tests (create sample records and exercise each automation path).

## 13) Monitoring & Maintenance

- Build an **Admin Dashboard** with Flow error counts, paused flows, and pending approvals.
- Document flow owners, inputs/outputs, and purpose in project documentation.
- Schedule periodic reviews to ensure automations reflect business needs.

- Keep a change log for all flow/config updates for audit/tracking.

#### **14) Sample Deliverables for Phase 4**

- List of Validation Rules (names, formulas, purpose).
- Flow names, diagrams (Visio/Miro) and descriptions.
- Email Templates and Email Alerts list with bodies.
- Approval Process specification and email templates.
- Custom Notification types and usage doc.
- Test cases and sandbox testing logs.
- Deployment Change Set or SFDX manifest.

#### **15) Quick Checklist (perform in Sandbox first)**

- Create and test Validation Rules.
- Create Email Templates and Email Alerts.
- Build and activate Record-Triggered Flows (Interview creation, Task creation, Submit for Approval).
- Build Scheduled Paths for reminders.
- Create Approval Process for Offers and test approval/rejection.
- Implement Roll-up/Flow to update Job Opening counts.
- Create Notification Types and test in-app/mobile notifications.
- Create Change Set and validate deployment.

