JOB APPLICATION TRACKING SYSTEM

SALESFORCE NAAN MUDHALVAN
PROJECT REPORT

Submitted By

HEMALATHA R (611420205012)
JEYABHARATHI G (611420205016)
THENMOZHI M (611420205042)
THIRISHA S (611420205043)
VINITHA R (611420205048)

in partial fulfilment for the award of the degree
of

BACHELOR OF TECHNOLOGY

in

INFORMATION TECHNOLOGY

MAHENDRA ENGINEERING COLLEGE FOR WOMEN
NAMAKKAL-637205

BONAFIDE CERTIFICATE

Certified that this project report titled **"JOB APPLICATION TRACKING SYSTEM"** is the BonafIde work of **"HEMALATHA R (611420205012), JEYABHARATHI G (611420205016), THENMOZHI M (611420205042), THIRISHA S (611420205043), VINITHA R (611420205048)"** who carried out the project work under my supervision.

SIGNATURE	**SIGNATURE**
Dr.SUBARNA	Mr.K.A.KARTHICK.M.E.,
HEAD OF THE DEPARTMENT	**FACULTY MENTOR**
PROFESSOR	**ASSISTANT PROFESSOR**
Department of Information Technology,	Department of Information Technology,
Mahendra Engineering College for Women,	Mahendra Engineering College For Women
Kumaramangalam,	Kumaramangalam,
Namakkal- 637 205.	Namakkal- 637 205.

--	--
SPOC	**HEAD OF THE DEPARTMENT**

ACKNOWLEDGEMENT

At the outset, we express our heartfelt gratitude to **GOD,** who has been our strength to bring this project to light.

At this pleasing moment of having successfully completed our project, we wish to convey our sincere thanks and gratitude to our beloved president **Mr. C. Balakrishnan,** who has provided all the facilities to us. We would like to convey our sincere thanks to our beloved Principal **Dr. B. Dora Arul Selvi, B.E., M.E., PH.D.,** for forwarding us to do our project and offering adequate duration in completing our project.

We express our sincere thanks to our Head of the Department **Dr. Subarna** Department of Information Technology for fostering the excellent academic climate in the Department.

We express our pronounced sense of thanks with deepest respect and gratitude to our Faculty Mentor **Mr.K.A. Karthick., M.E.,** Department of Information Technology for their valuable and precious guidance and for having amicable relation.

With deep sense of gratitude, we extend our earnest and sincere thanks to our SPOC **Dr. S. Manimegalai.,** Head of the Department of Information Technology for his guidance and encouragement during this project. We would also like express our thanks to all the faculty members of our Department, friends and students who helped us directly and indirectly in all aspects of the project work to get completed successfully.

TABLE OF CONTENTS

1.INTRODUCTION

Salesforce, a leading cloud-based Customer Relationship Management (CRM) platform, is a pivotal tool for organizations to manage customer data, optimize sales processes, and elevate customer interactions. Its multifaceted features include Sales Cloud, which enhances sales management through lead tracking, opportunity management, and seamless email integration. Service Cloud focuses on exceptional customer support, featuring case management, knowledge base development, and multi-channel support. Marketing Cloud empowers businesses with marketing automation, email campaigns, social media engagement, and in-depth analytics. Salesforce's hallmark is its customizability, allowing businesses to tailor the platform to meet specific requirements, while robust integration capabilities facilitate seamless connections with other business applications.

The platform equips businesses with powerful reporting and analytics tools, enabling data-driven decisions and insightful, customized reports and dashboards. Salesforce ensures mobile accessibility, enabling users to stay connected and productive while on the move. A paramount emphasis on data security and compliance guarantees data protection and privacy. Whether you're a small start-up or a large enterprise, Salesforce offers scalability to accommodate your evolving needs.

Through Salesforce, organizations foster improved customer relationships, increased sales efficiency, and superior customer support. It empowers businesses to make data-driven decisions, streamline operations, and create impactful, targeted marketing campaigns. This introduction encapsulates Salesforce's capabilities and benefits, offering a concise overview for your project document, allowing for a better understanding of how the platform can contribute to your specific project goals.

2.PROJECT SPECIFICATIONS

2.1 Project Goal

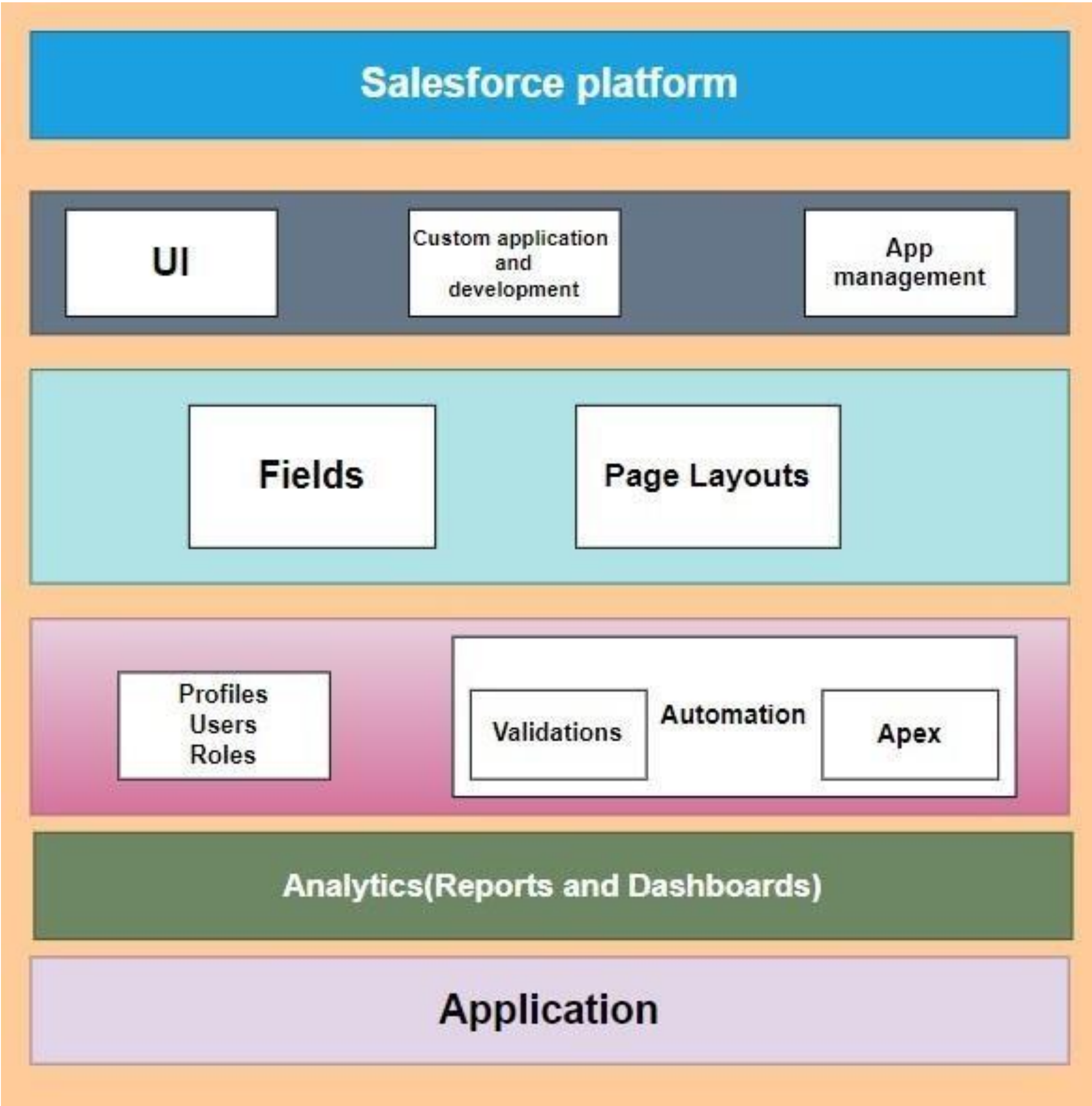
The goal of this project is to create a CRM (Customer Relationship Management) application tailored for job applicants, designed to streamline the job application process. The application will allow users to track the number of job applications they have submitted and provide easy access to job postings from various recruiters. The project involves technical components such as creating a developer account, defining custom objects and relationships, configuring tabs, and building an application. Additionally, it covers user management, access control, reporting, and dashboards. The objective is to empower users to efficiently manage their job applications and access relevant job listings within the Salesforce platform.

2.2 Project Scope

- **Creation of Developer Account (Milestone 1):** This involves setting up a developer account on the Salesforce platform, which will serve as the foundation for building the CRM application.
- **Object Creation (Milestone 2):** Custom objects and relationships will be defined to efficiently store and manage data related to job applications, recruiters, and other relevant information.
- **Tabs Creation (Milestone 3):** Tabs will be configured to provide user-friendly access to different sections and functionalities within the CRM application.
- **Create App (Milestone 4):** The CRM application will be created, and it will serve as the central hub for managing job applications and accessing job postings.

- **Fields & Relationships (Milestone 5):** Custom fields and relationships will be established to capture specific data attributes related to job applications and recruiters.
- **Profile (Milestone 6):** User profiles will be configured to define access permissions and roles within the application.
- **Role and Role Hierarchy (Milestone 7):** Role-based access control will be set up to determine who can view and edit specific data within the CRM.
- **Users (Milestone 8):** User management will involve adding and configuring user accounts, specifying their roles and access levels.
- **Sharing Rules (Milestone 9):** Sharing rules will be defined to ensure that users can appropriately share and access data based on predefined criteria.
- **User Adoption (Milestone 10):** Strategies and tools will be implemented to encourage user adoption and make the application user-friendly.
- **Reports (Milestone 11):** Custom reports will be created to track and analyse job application data, providing valuable insights for users.
- **Dashboards (Milestone 12):** Dashboards will be designed to display key performance indicators and visual summaries of application data.
- The project aims to create a comprehensive CRM application that helps job applicants track their applications and access job postings from recruiters. It covers the technical architecture, data modeling, and user adoption aspects of Salesforce. The scope is to deliver an efficient, user-friendly, and productive tool for managing the job application process within the Salesforce platform.

2.3 Technical Requirements



2.4 Functional Requirements

- **User Registration and Authentication:** Users should be able to create accounts with unique usernames and passwords. User authentication and authorization should be implemented to ensure data security.
- **Dashboard:** Users should have a personalized dashboard displaying key metrics such as the number of job applications submitted and the status of each application.
- **Job Application Tracking:** Users should be able to record details of each job application, including the job title, company, date applied, application status, and any related notes. Users should be able to filter and search through their job applications.
- **Job Postings:** Job postings from various recruiters should be accessible within the application. Users should be able to view details of job postings, such as job descriptions, qualifications, and application deadlines.
- **Custom Objects and Relationships:** Custom objects for job applications, job postings, and recruiters should be defined with appropriate relationships. Relationships between applicants and their job applications, as well as between job applications and job postings, should be established.
- **Profile Management:** Users should have the ability to edit their profiles and update personal information. Profiles should include user-specific settings and preferences.
- **Role-Based Access Control:** Access permissions should be defined based on user roles (e.g., applicant, recruiter). Users should only have access to data and features relevant to their roles.
- **User Management:** Administrators should be able to add, modify, or deactivate user accounts. User roles and permissions should be customizable.
- **Sharing Rules:** Sharing rules should be configured to allow data sharing based on predefined criteria, ensuring privacy and data access control.

- **Reporting:** Users should be able to generate custom reports based on their job application data. Standard reports and report templates should be available for common use cases.
- **Notifications and Reminders:** Users should receive notifications and reminders for application deadlines, interview schedules, and other important events. Notifications can be delivered via email or within the application.
- **Integration with External Platforms:** Integration with job search platforms or websites to import job postings automatically. Integration with email services to track application-related correspondence.
- **Data Import and Export:** Users should have the capability to import and export their application data for backup or transfer purposes.
- **User Adoption Features:** Onboarding guides, tutorials, and tooltips to help users navigate and effectively use the system. Feedback mechanisms to collect user suggestions and improve the application.
- **Customization and Configuration:** Administrators should be able to customize the application's appearance, fields, and workflows to suit their organization's needs.
- **Mobile Accessibility:** The application should be accessible on mobile devices to allow users to track job applications on the go.
- **Security and Data Privacy:** Data encryption, secure connections, and compliance with data privacy regulations (e.g., GDPR) should be implemented to protect user data.
- **Scalability:** The system should be scalable to accommodate a growing number of users, job applications, and job postings.
- **Backup and Recovery:** Regular data backups and a disaster recovery plan should be in place to prevent data loss.

3.PREPARATION DATA MODELING

Objects:

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:

1.Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

2.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.

In This Application We Use 4 Custom Objects:

1.Recruiter

2.Jobs

3.Candidate

4.Job-Application

1)Create A Custom Object for Recruiter:

1.From setup click on object manager.

2.Click create, select custom object.

3.Fill in the label as " Recruiter ".

4.Fill in the plural label as " Recruiters".

5.Record name: " Recruiter Name"

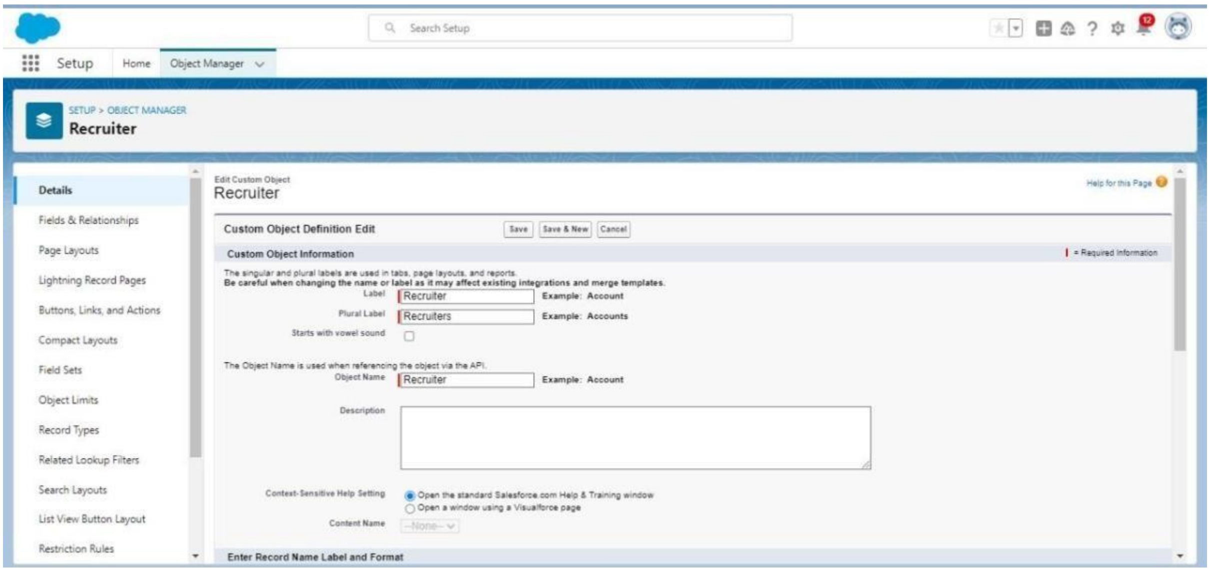
6.Select the data type as "Text".

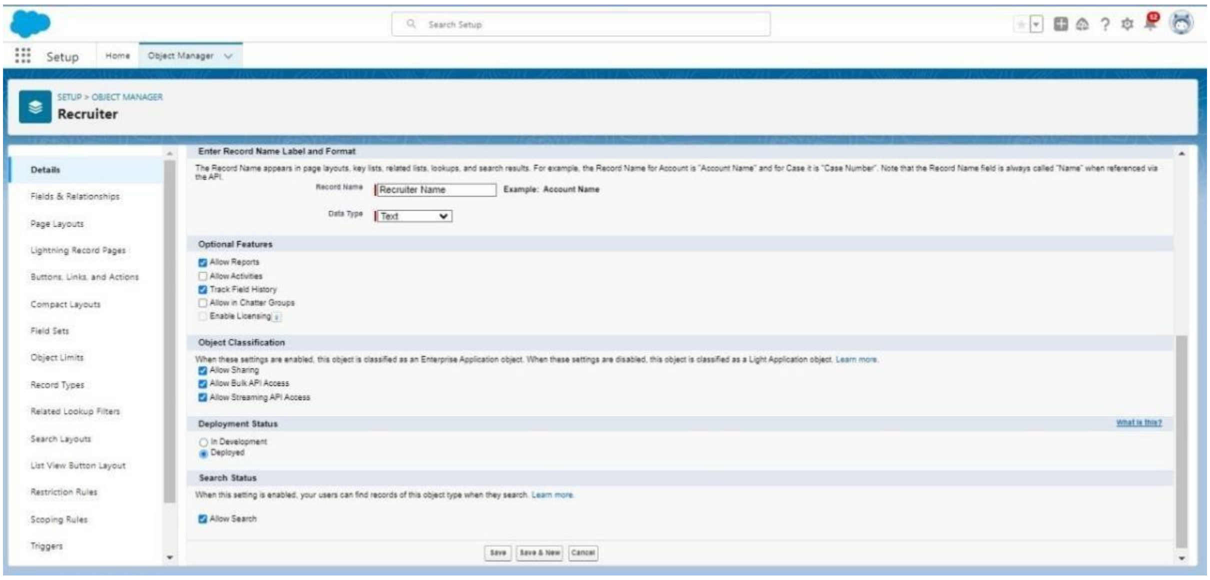
7.In the Optional Features section, select Allow Reports and Track Field History.

8.In the Deployment Status section, ensure Deployed is selected.

9.In the Search Status section, select Allow Search.

10.In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.





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

2)Creation of Jobs Object

1.Click on the gear icon and then select Setup.

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

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

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

5.Label: Job

6.Plural Label: Jobs

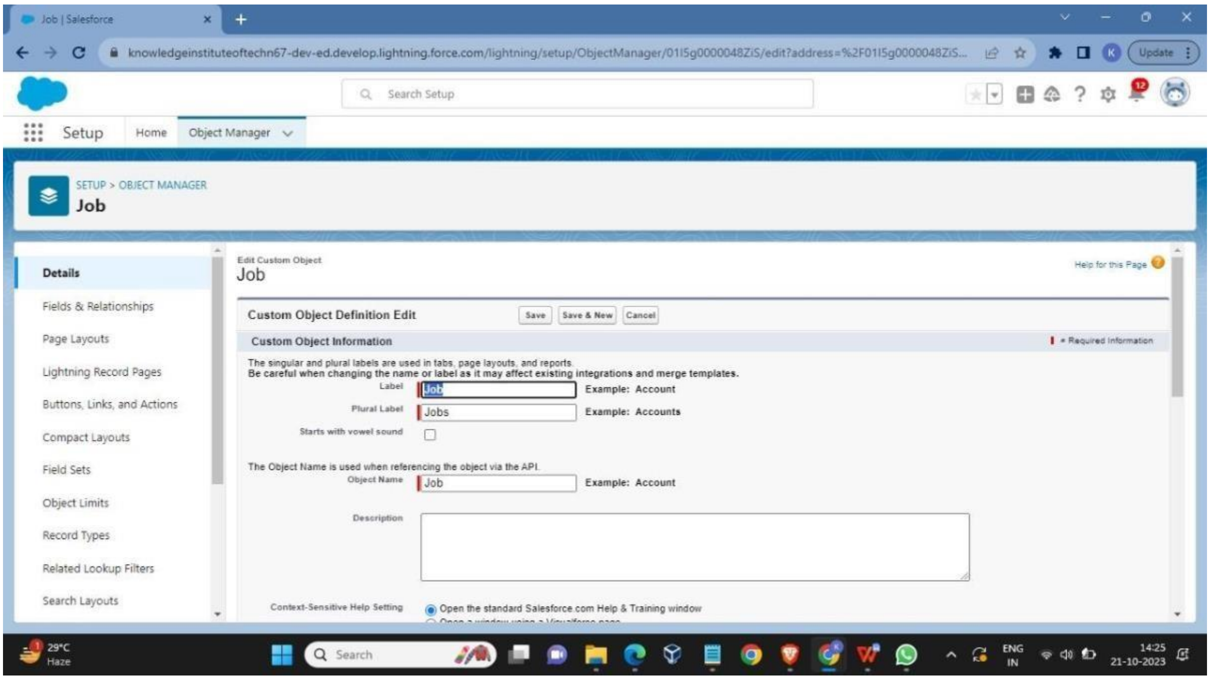
7.Record Name: Job Name

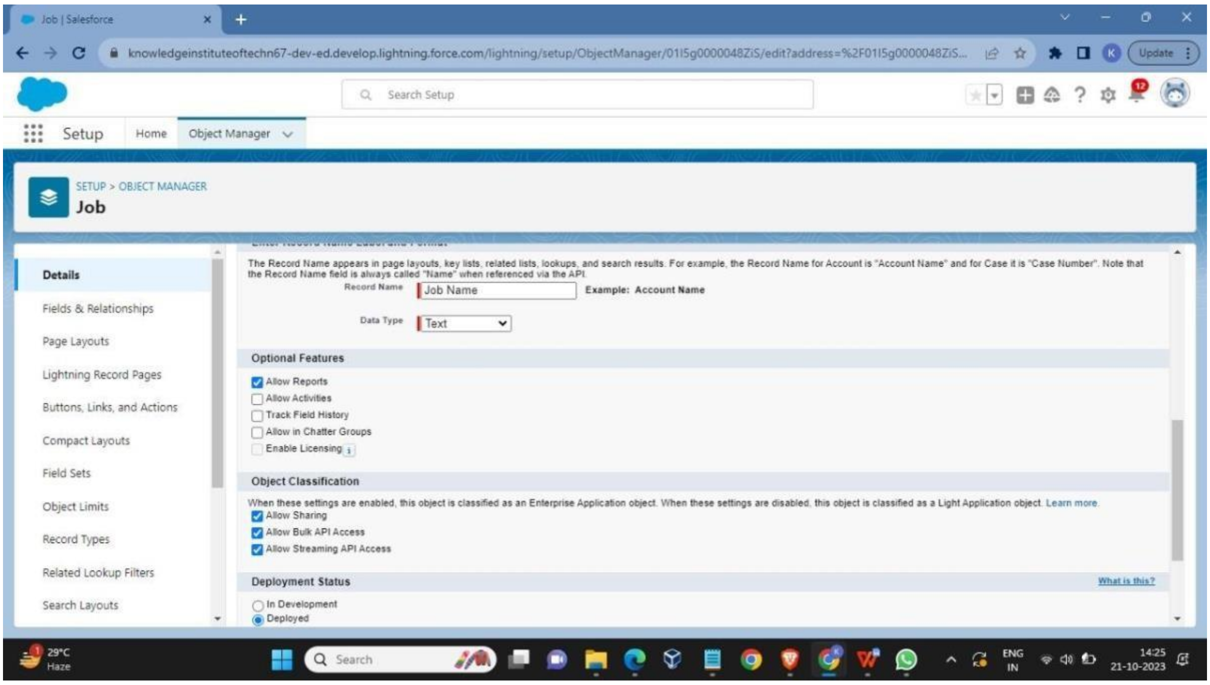
8.Select the data type as "Text".

9.Check the Allow Reports checkbox

10.Check the Allow Search checkbox

11.In the Object Creation Options section, select Add Notes and Attachments related list to default page layout 12.Click Save.





3)Creation of Candidate Object

1.Click on the gear icon and then select Setup.

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

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

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

5.Label: Candidate

6.Plural Label: Candidates 7.Record Name:

Candidates Name

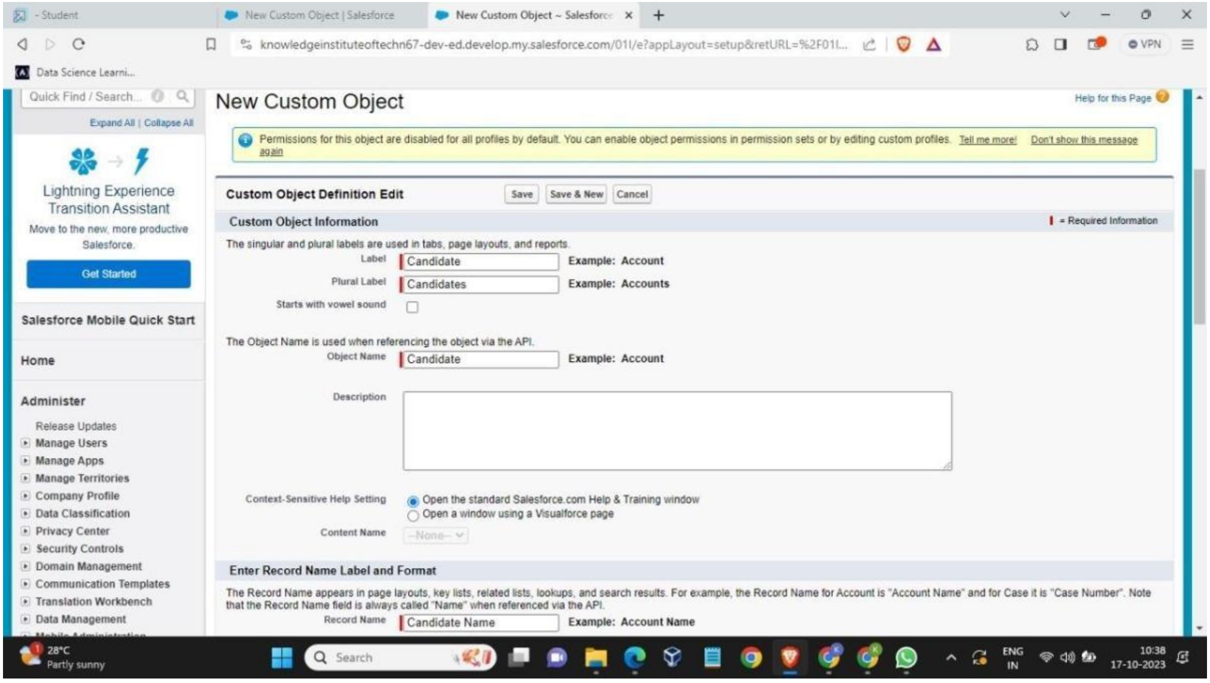
8.Select the data type as "Text".

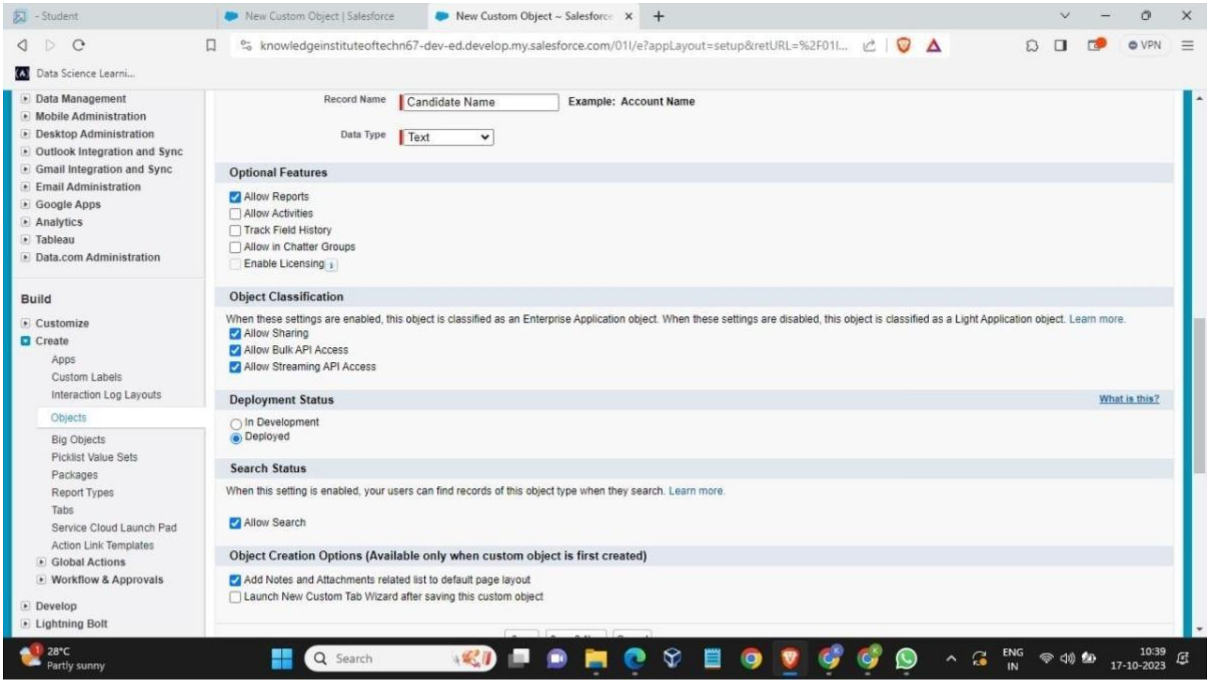
9.Check the Allow Reports checkbox.

10.Check the Allow Search checkbox.

11.In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

12.Click Save.





4)Creation of Job Application Object

1.Click on the gear icon and then select Setup.

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

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

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

5.Label: Job Application

6.Plural Label: Job Applications 7.Record Name:

Job Application Number

8.Select the data type as "Auto Number".

9.Under display format enter "JP- {0000}"

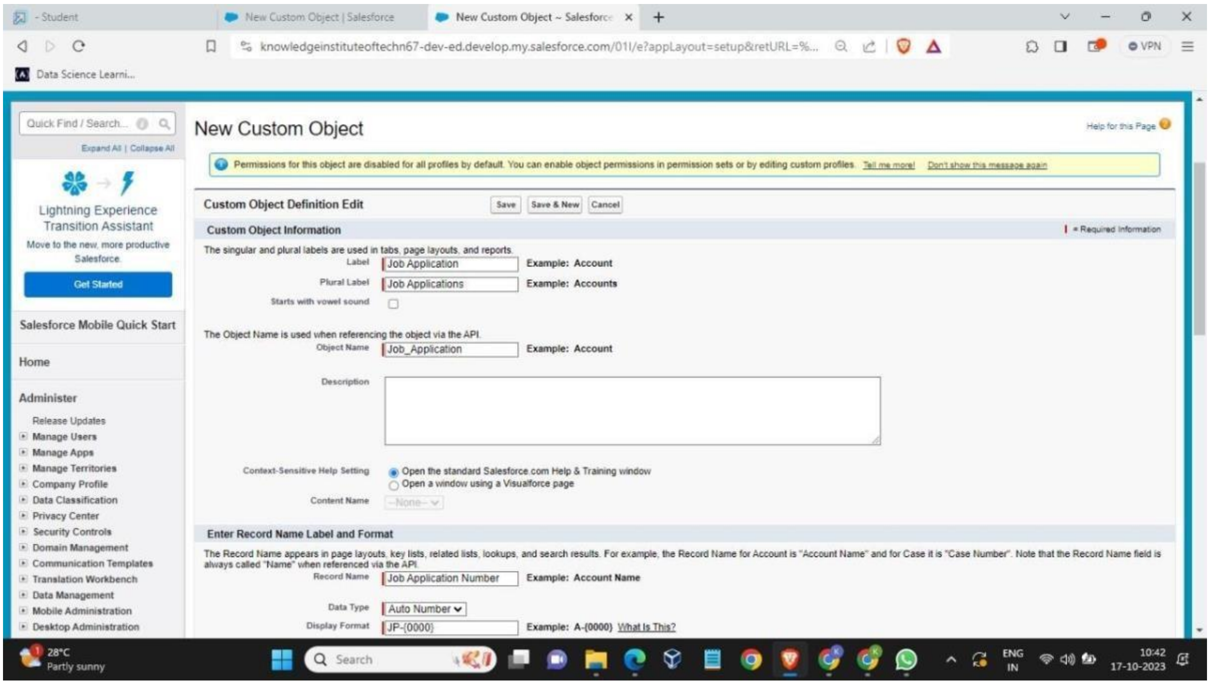
10.Enter starting number as 1 11.Check the

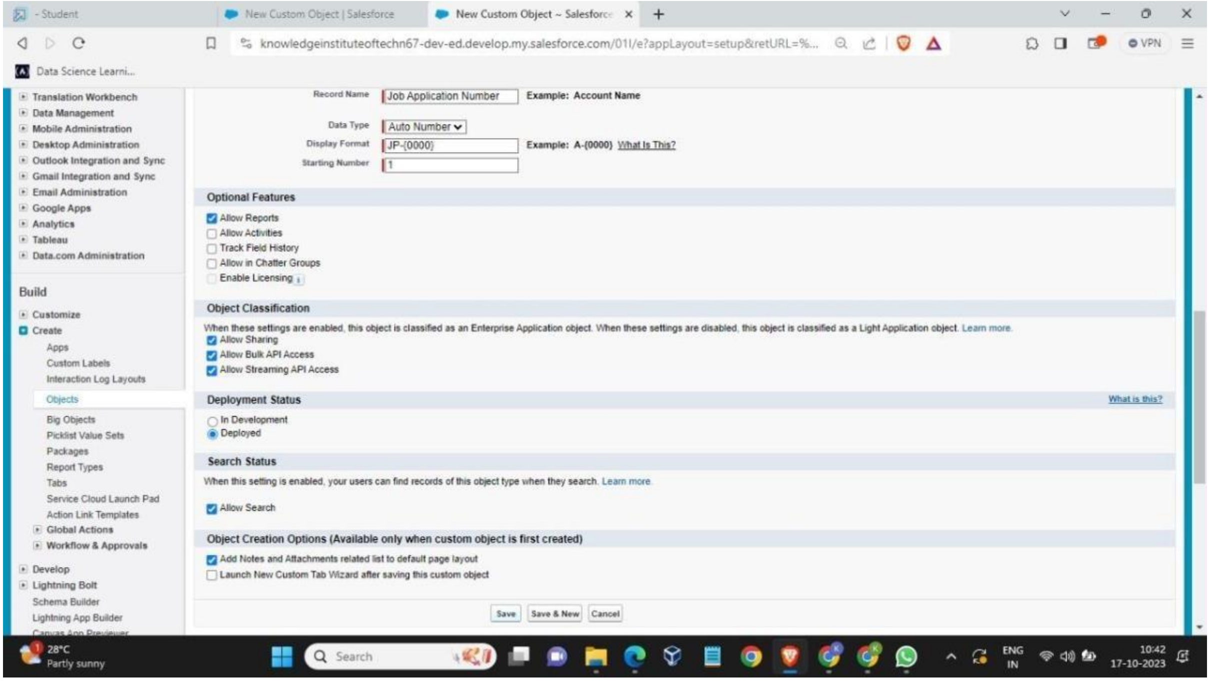
Allow Reports checkbox.

12.Check the Allow Search checkbox.

13.In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

14.Click Save.





Tabs:

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

1.**Standard Object Tabs:** Standard object tabs display data related to standard objects.

2.**Custom Object Tabs:** Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.

3.**Web Tabs:** Web Tabs display any external Web-based application or Web page in a Salesforce tab.

4.**Visualforce Tabs:** Visualforce Tabs display data from a Visualforce Page.

1)Creation of Recruiter Tab

1.Now create a custom tab.

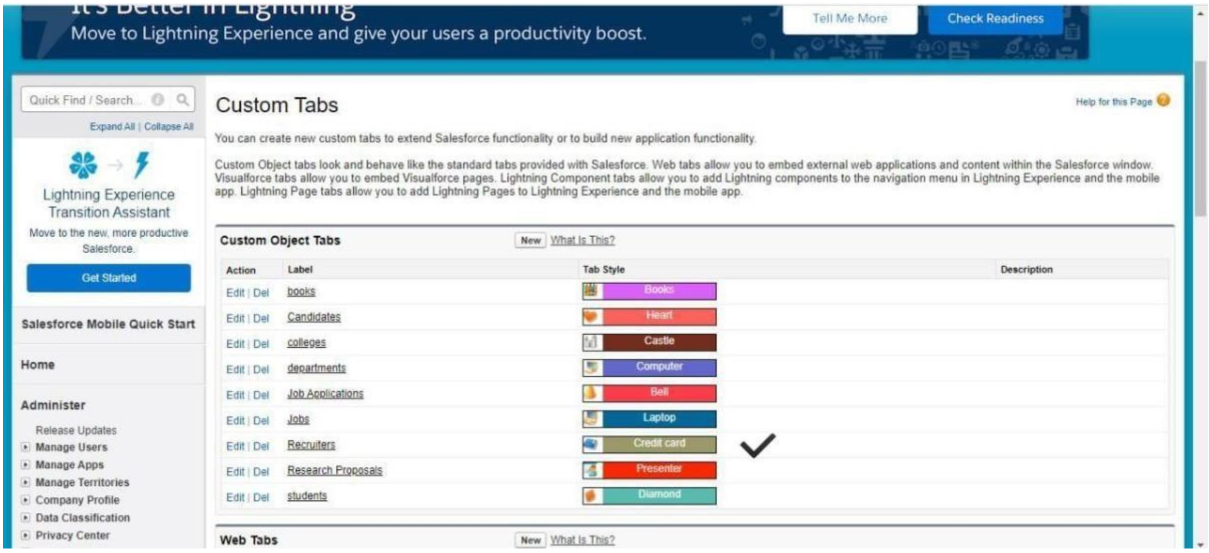
2.Click on Home tab, enter Tabs in Quick Find and select Tabs.

Under custom object tabs, click New

3.For Object, select Recruiter.

4.For Tab Style, select any icon.

5.Leave all defaults as is. Click Next, Next, and Save.



2)Creation of Job Tab

1.Now create a custom tab.

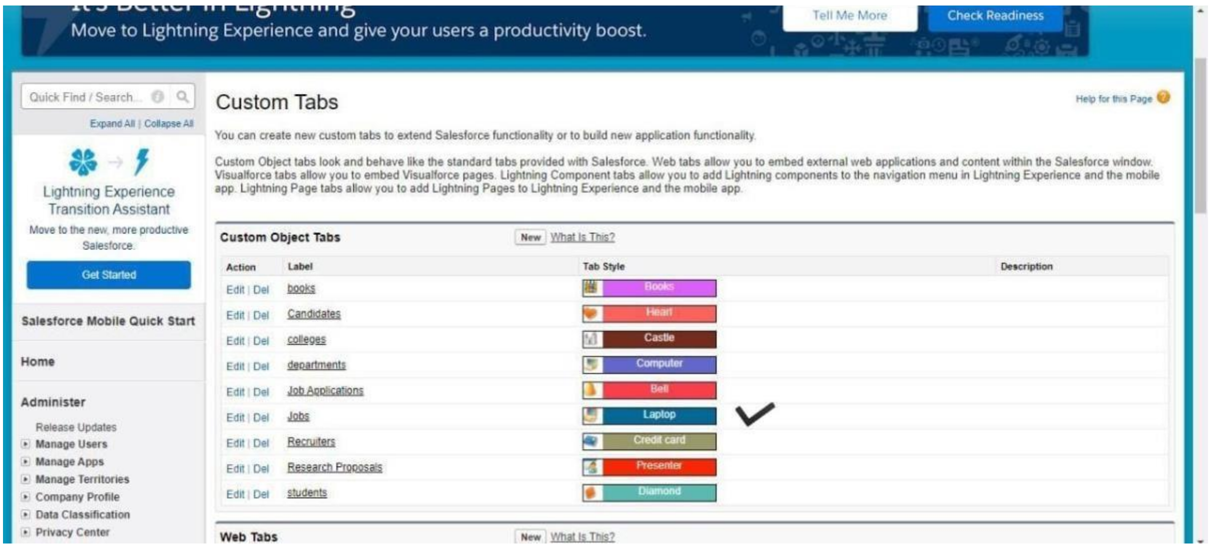
2.Click on Home tab, enter Tabs in Quick Find and select Tabs.

3.Under custom object tabs, click New.

4.For Object, select Job.

5.For Tab Style, select any icon.

6.Leave all defaults as is. Click Next, Next, and Save.



3)Creation of Candidate Tab

1.Now create a custom tab.

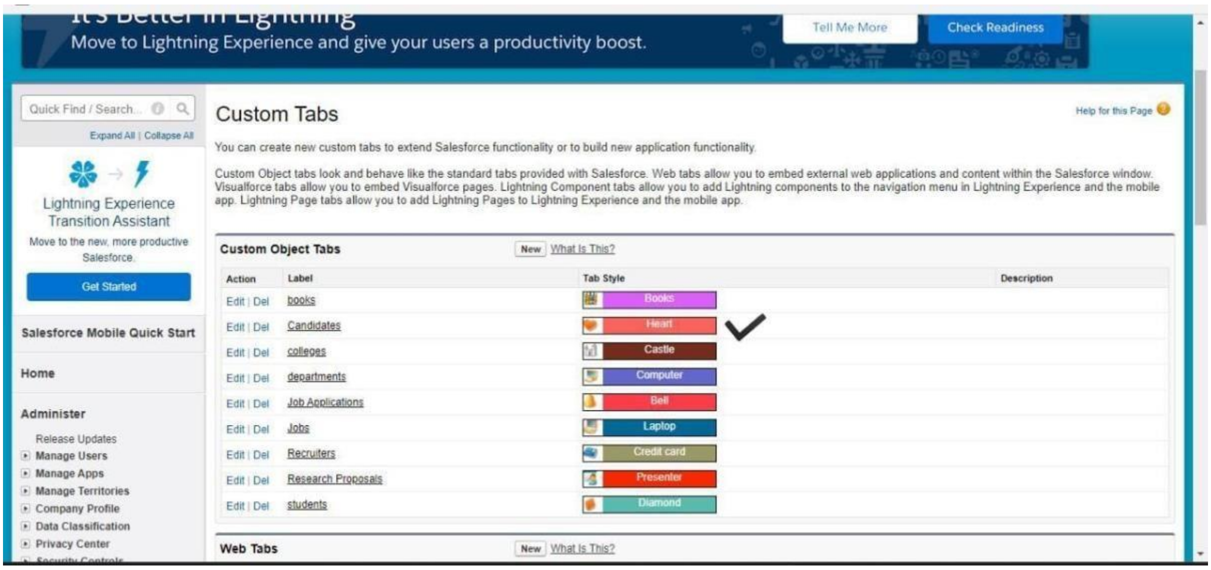
2.Click on Home tab, enter Tabs in Quick Find and select Tabs.

3.Under custom object tabs, click New.

4.For Object, select Candidate.

5.For Tab Style, select any icon.

6.Leave all defaults as is. Click Next, Next, and Save



4)Creation of Job Application Tab

1.Now create a custom tab.

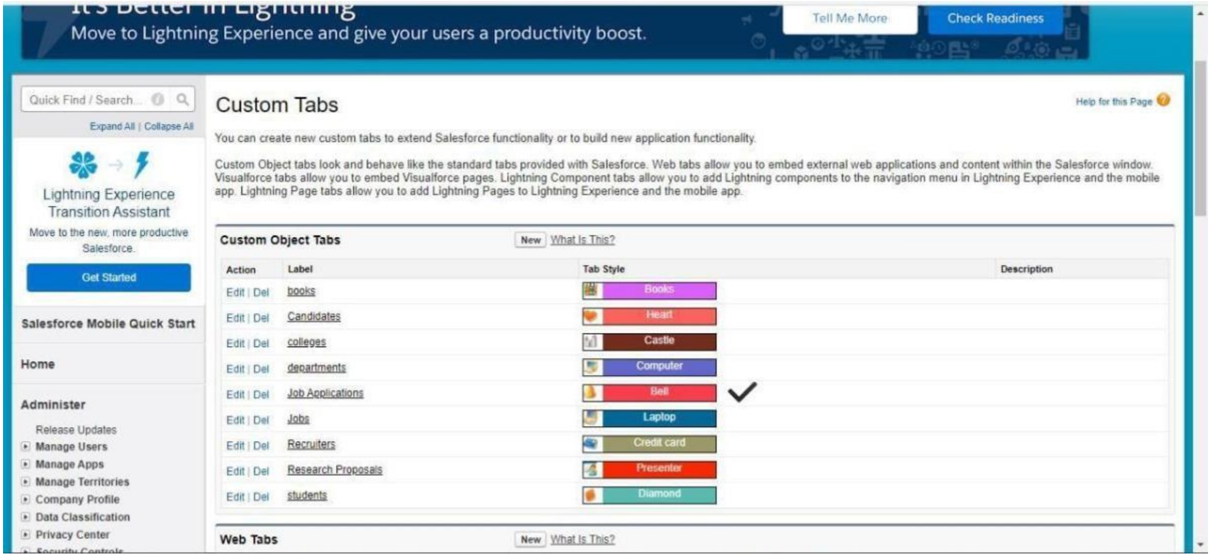
2.Click on Home tab, enter Tabs in Quick Find and select Tabs.

3.Under custom object tabs, click New.

4.For Object, select Job Application.

5.For Tab Style, select any icon.

6.Leave all defaults as is. Click Next, Next, and Save.



Lightning App:

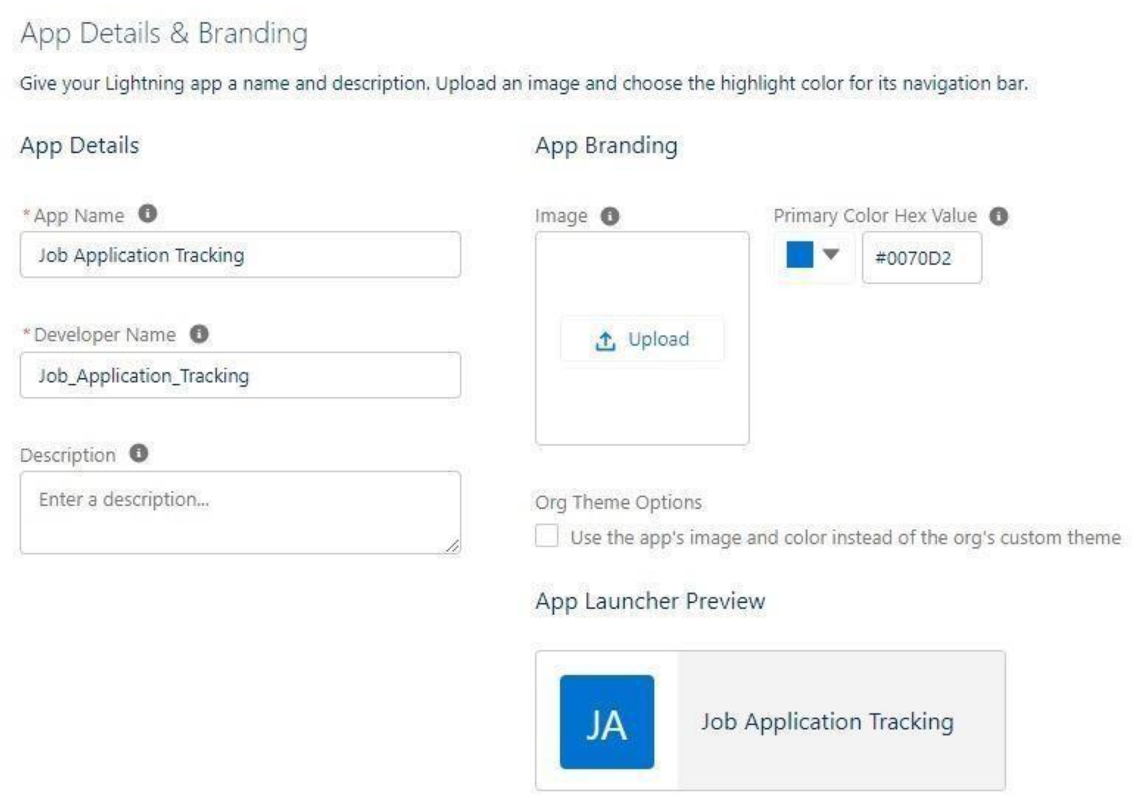
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

Standard apps: these apps come with every occurrence of Salesforce as default. Community, Call Centre, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.

Custom apps: these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

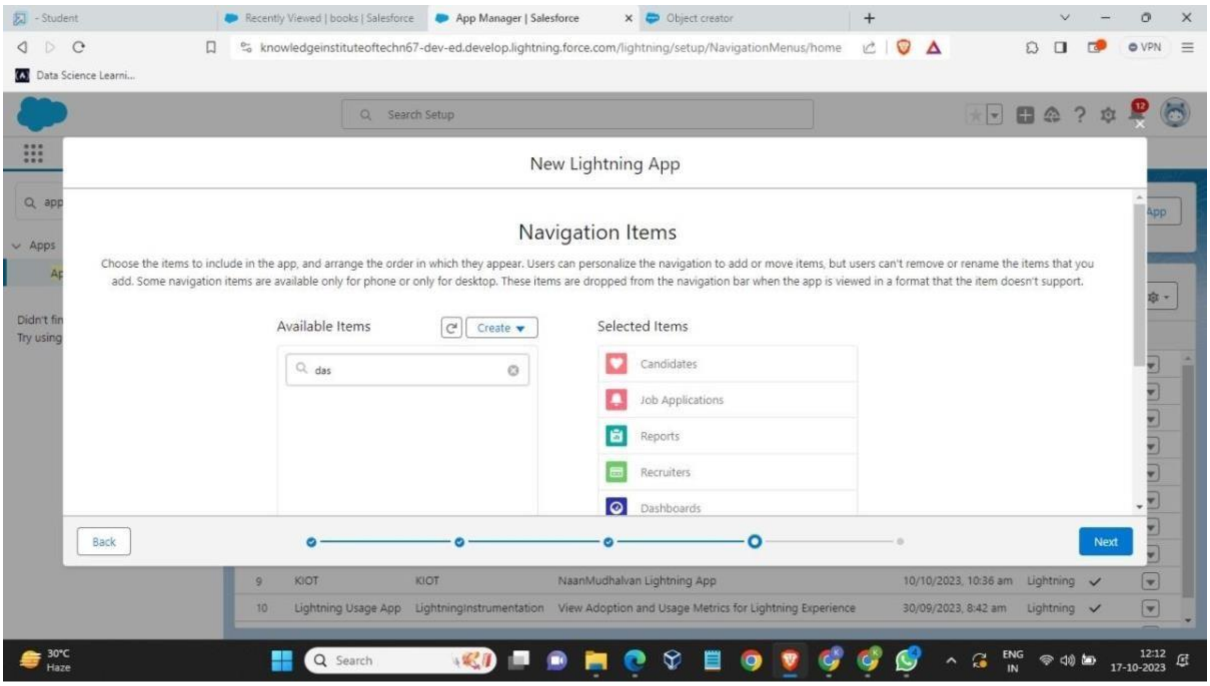
1.Click New Lightning App. Job Application Tracking as the App Name, then click Next



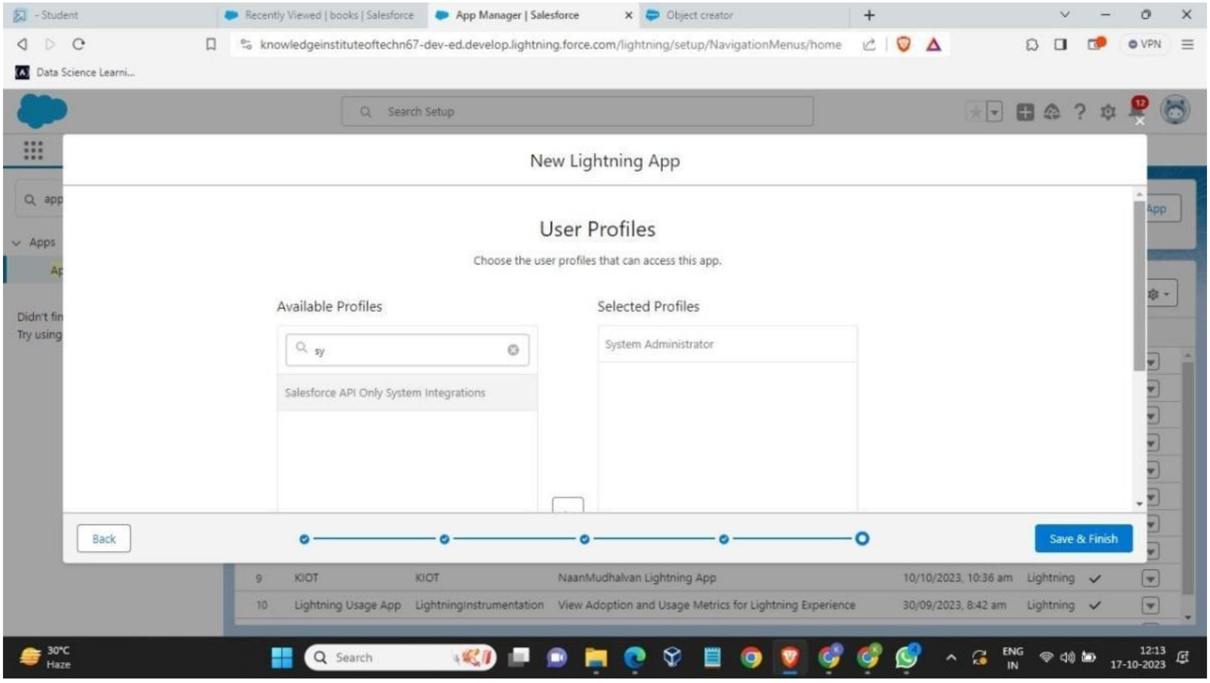
2.Under App Options, leave the default selections and click Next.

3.Under Utility Items, leave as is and click Next.

4.From Available Items, select Recruiters, Jobs, Candidates, Job Application Reports, and Dashboards and move them to Selected Items. Click Next.



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



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

Fields and Relationship:

Fields in Salesforce represent what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in salesforce:

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

Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required. **1)Creation of Fields for The Recruiter Objects**

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

2.Click the Object Manager tab next to Home.

3.Select Recruiter.

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

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

--Click New to create a custom field. Tip: Before creating a new field, do a quick search to make sure a similar one doesn' t already exist.

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

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

7.Next, Next and Click save.

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

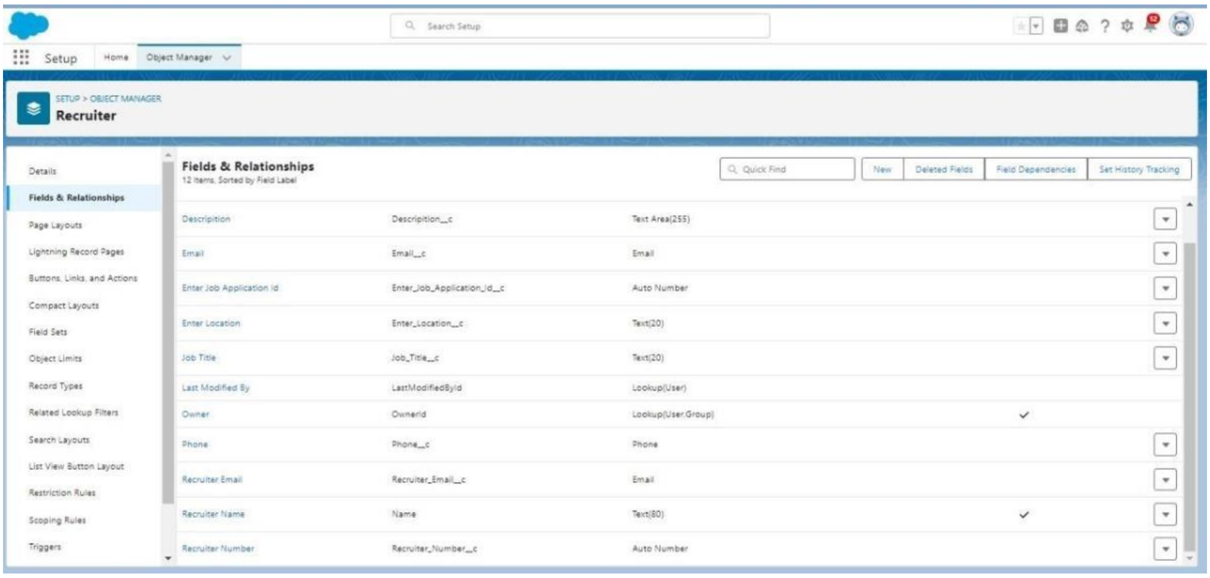
--Select the Text as the Data Type, then click Next. For Field Label, Job Title. Enter Length (20) Click Next, Next, then Save & New.

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

9.Click Next, Next, then Save & New.

--Select the phone as the Data Type, then click Next. For Field Label, Phone.

10.Click Next, Next, then Save & New.



2)Creation of Fields for The Job Objects

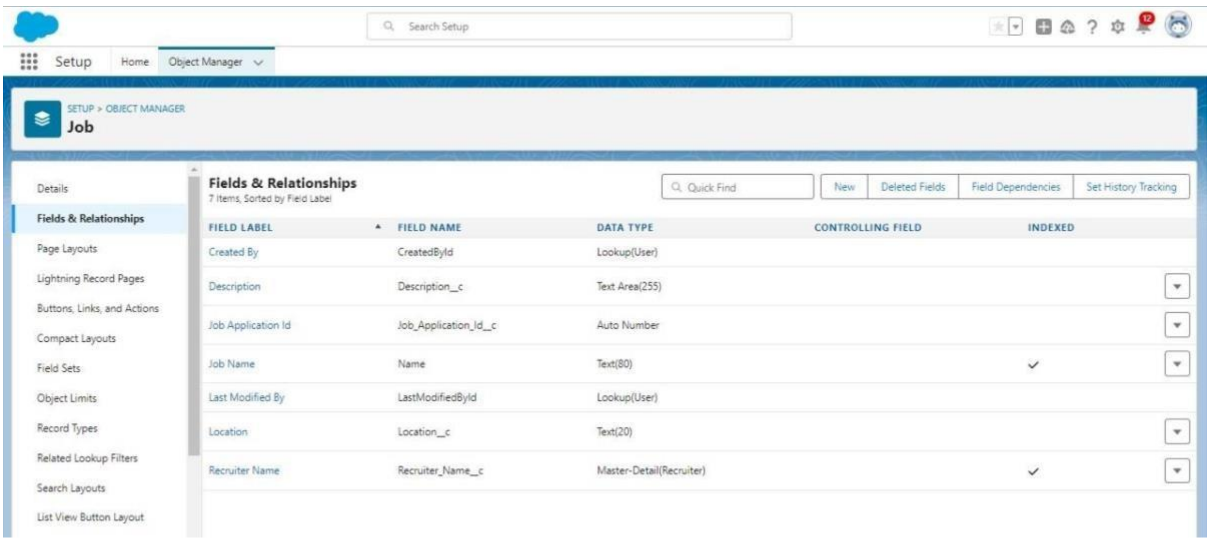
1.Select the Auto number as the Data Type, then click Next.

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

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

4.Click Next, Next, then Save & New.

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



3)Creation of Master-Detail Relationship for Job Object

1.From Setup, go to Object Manager

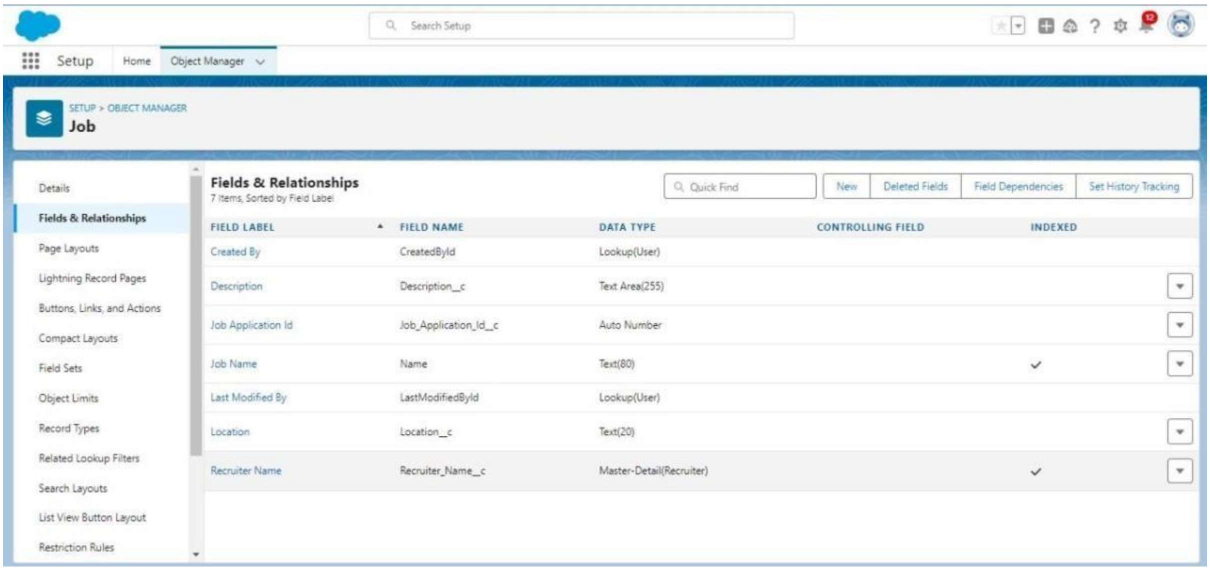
2.On the sidebar, click Fields & Relationships.

3.Click New.

4.Choose Master-detail Relationship and click Next

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

6.Enter the label name (Recruiter Name)



4)Creation of Fields for The Candidate Object

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

2.Click Next, Next, then Save & New.

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

4.Click Next, Next, then Save & New.

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

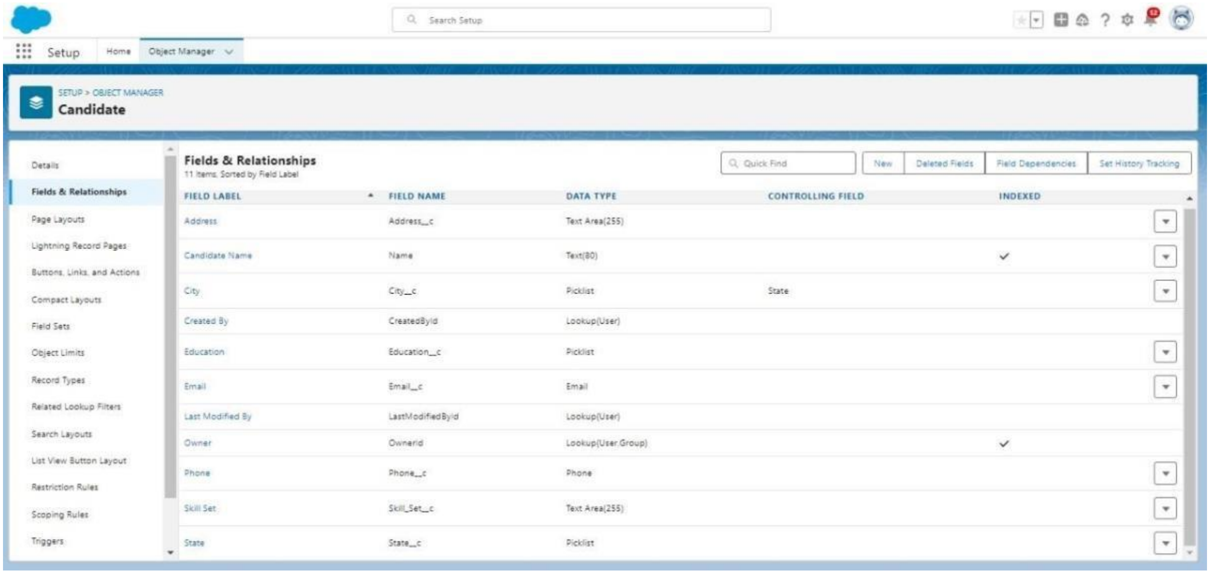
6.Click Next, Next, then Save & New

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

8.Select Enter values, with each value separated by a new line and enter these values: Graduation, 9.Post-Graduation. Click Next, Next, then Save & New.

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

11.Click Next, Next, then Save & New



5)Create Picklist Fields on Candidate Object

1.Click on the gear icon and then select Setup.

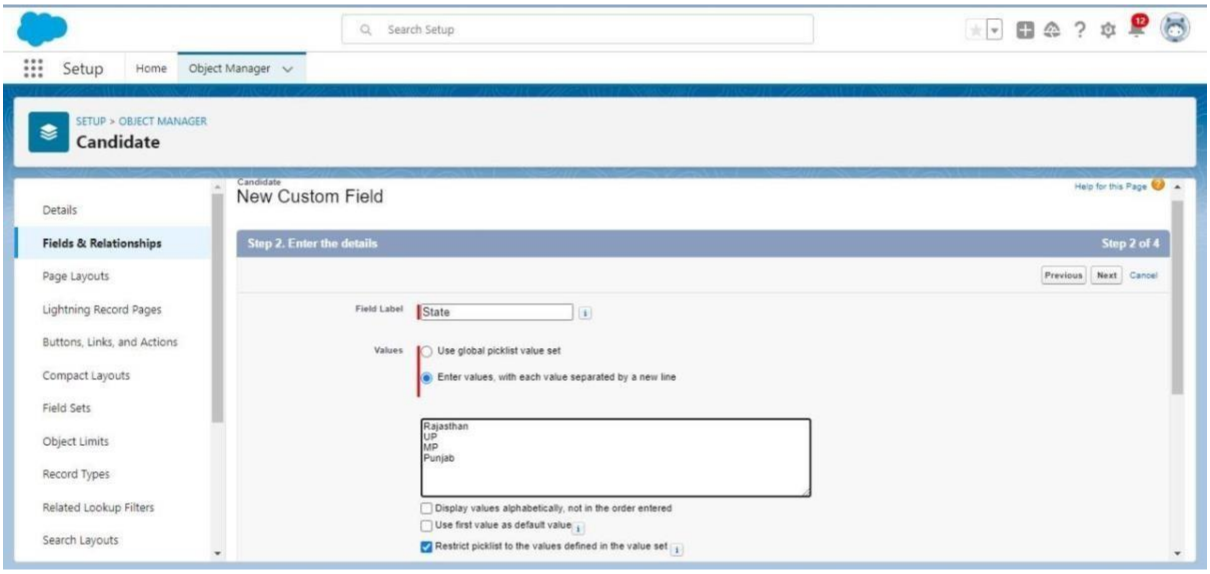
2.Click on the object manager tab just beside the home tab.

3.After the above steps, Select candidate Object

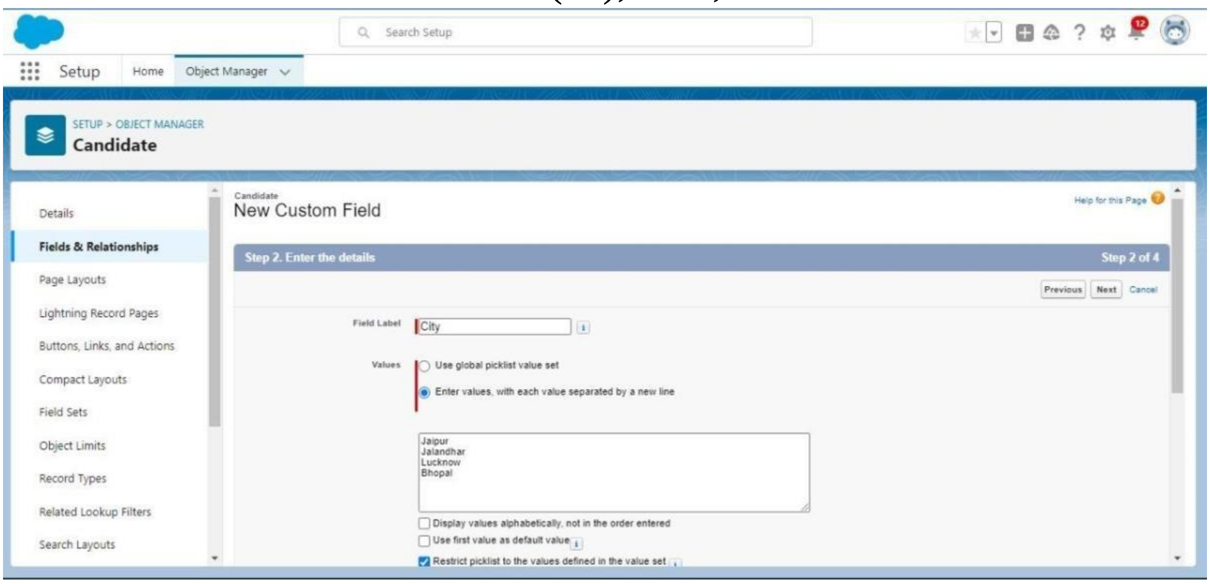
4.Now Select Fields and relationships from setup menu of the candidate object.

5.Click new and select Picklist fields ????next and enter label name (State) and select enter values option

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

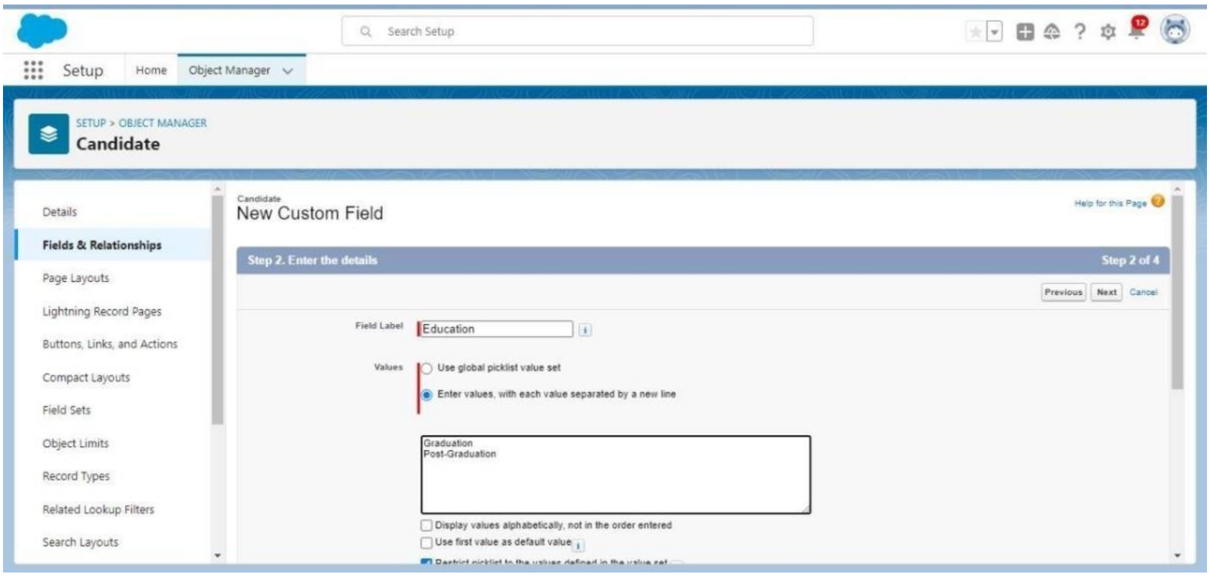


7.Select Picklist as the Data Type and click Next. For Field Label Name City and Select Enter values, with each value separated by a new line and enter these values (JS), next, next and Save.



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

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



6)Create Field Dependency (On Candidate Object)

1.Create a dependency between these two picklists, so that when a state is selected, only respective Values are available.

2.The below steps will assist you in creating Field Dependencies.

3.Click on the gear icon and then select Setup.

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

5.After the above steps, Select Candidate Object

6.Now Select Fields and relationships from setup menu of the Candidate object.

7.Click Field Dependencies.

8.Click New.

9.Select State as the Controlling Field and select City as the Dependent Field.

10.Click Continue.

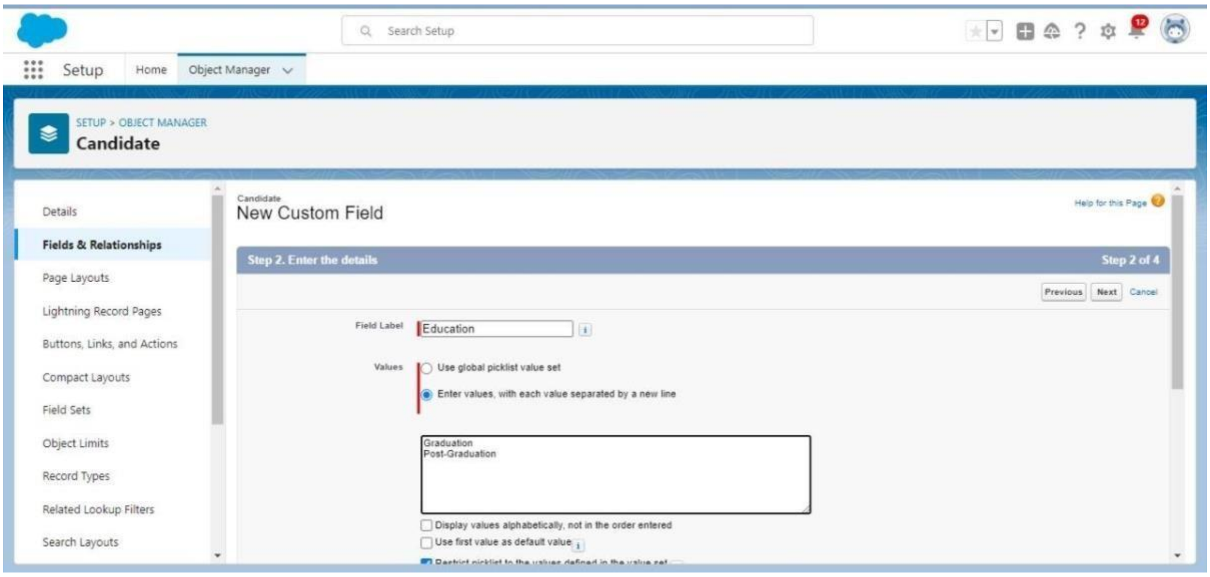
11.Select the appropriate Value in each column by double-clicking them. For Ex. Rajasthan – Jaipur

12.Click Include Values. And it is also same for UP, MP& Punjab with its city.

13.Click Preview, then test the dependency by selecting different State and viewing the associate Values available for Particular state.

14.Click Close to close the preview window.

15.Click Save.



7)Create Field Dependency (On Candidate Object)

1.Create a dependency between these two picklists, so that when a state is selected, only respective Values are available.

2.The below steps will assist you in creating Field Dependencies.

3.Click on the gear icon and then select Setup.

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

5.After the above steps, Select Candidate Object

6.Now Select Fields and relationships from setup menu of the Candidate object.

7.Click Field Dependencies.

8.Click New.

9.Select State as the Controlling Field and select City as the Dependent Field.

10.Click Continue.

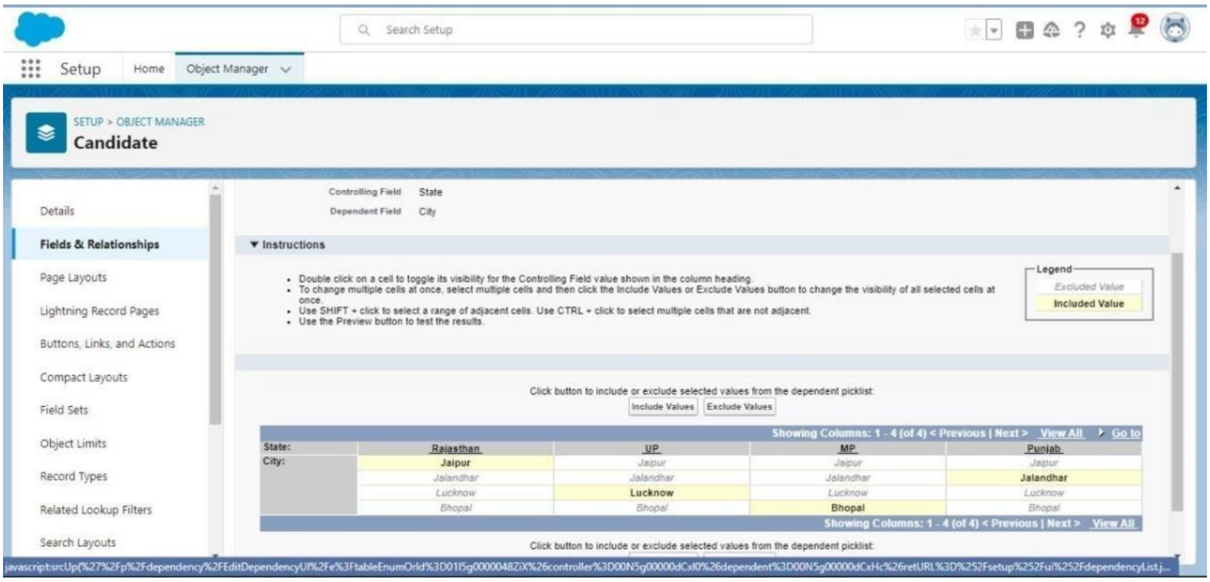
11.Select the appropriate Value in each column by double-clicking them. For Ex. Rajasthan - Jaipur

12.Click Include Values. And it is also same for UP, MP& Punjab with its city.

13.Click Preview, then test the dependency by selecting different State and viewing the associate Values available for Particular state.

14.Click Close to close the preview window.

15.Click Save.



8)Creation Lookup Relationship for The Job Application Objects

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

1.From Setup, go to Object Manager

2.On the sidebar, click Fields & Relationships.

3.Select Lookup relationship & click next

4.Choose the related object as Candidate & click next

5.Give the field label (Candidate name) & click next, next, next and Save

Second lookup relationship

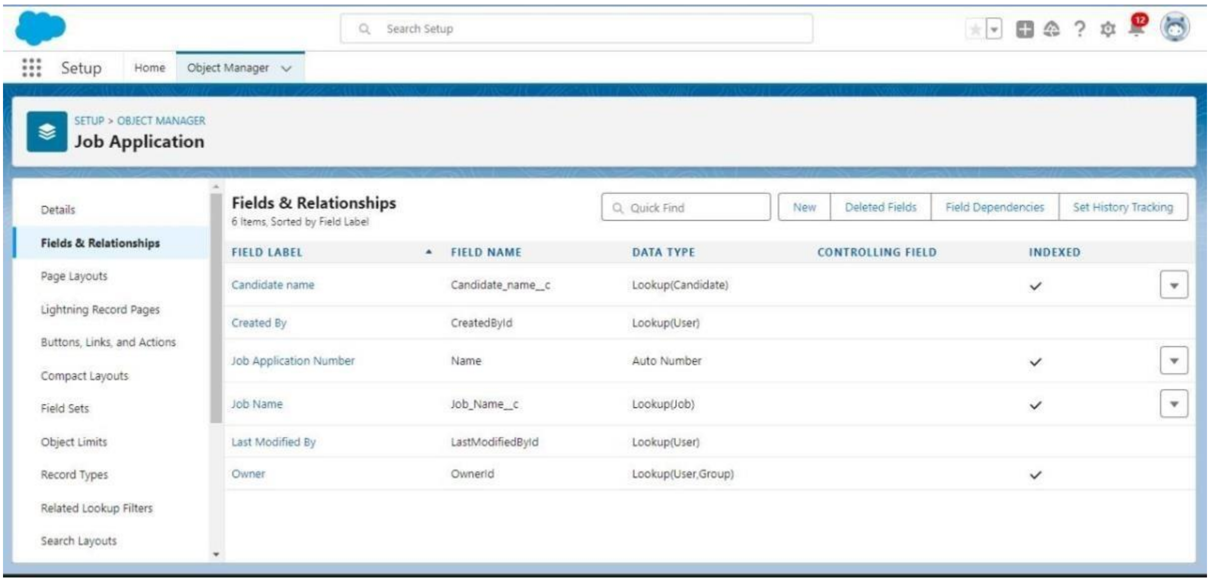
1.From Setup, go to Object Manager

2.On the sidebar, click Fields & Relationships.

3.Select Lookup relationship & click next

4.Choose the related object as Job & click next

5.Give the field label (Job Name) & click next, next, next and Save



4. USERS & DATA SECURITY

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.

1)Create A Custom Profile

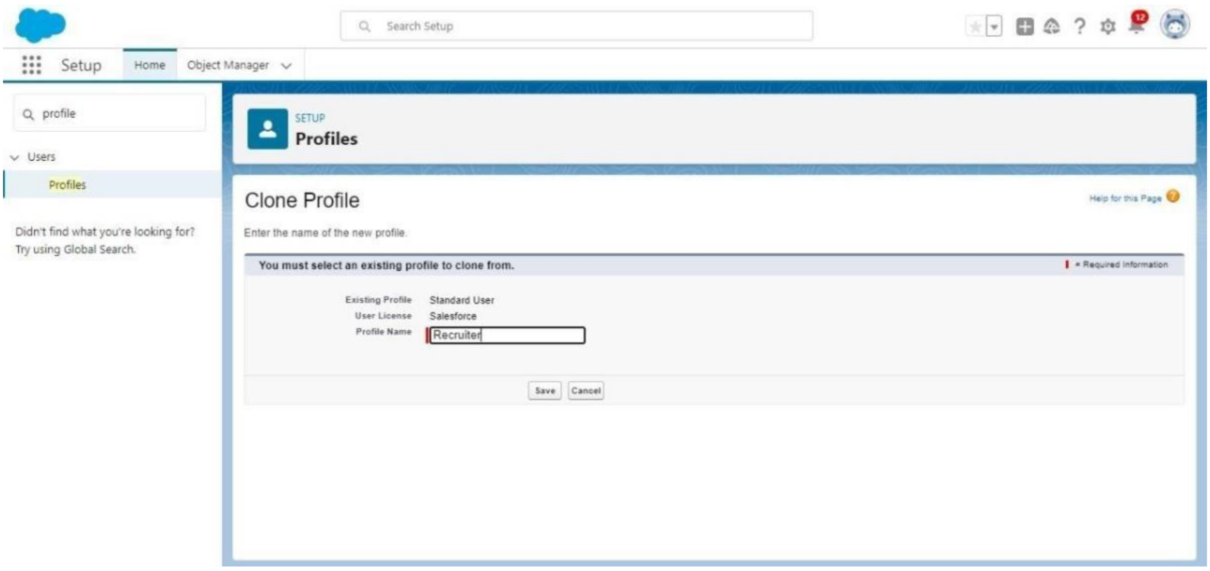
1.From setup, enter profiles in Quick Find box

2.Select profiles (Standard user).

3.Click clone.

4.For Profile, enter Recruiter.

5.Click save.



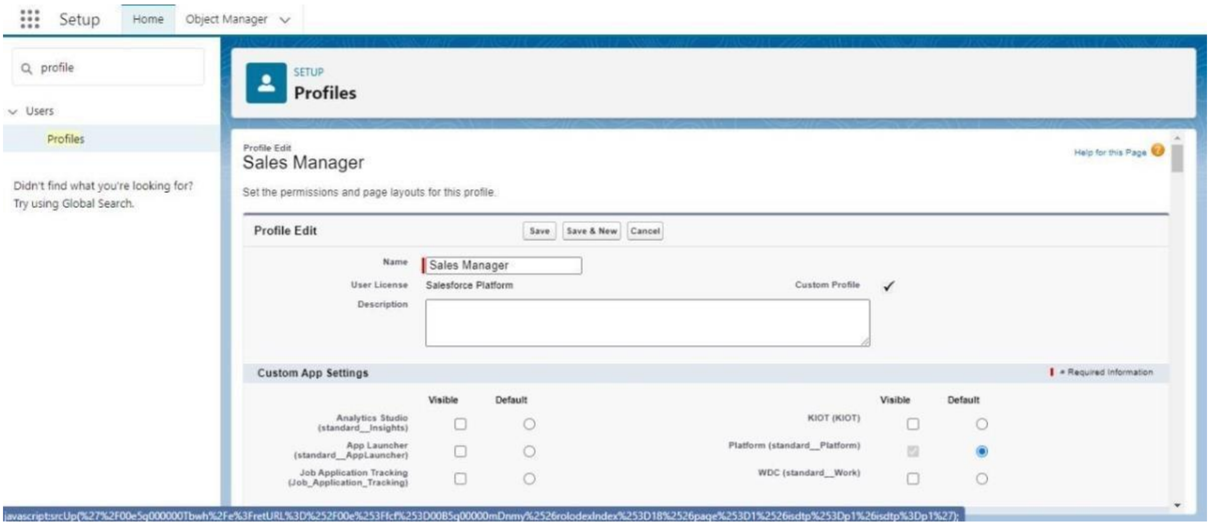
2)Create A Custom Profile-2

1.Create a profile with the profile name as " Sales Manager" .

2.From setup, enter profiles in Quick Find box

3.Select profiles (Standard user).

4.Click clone.



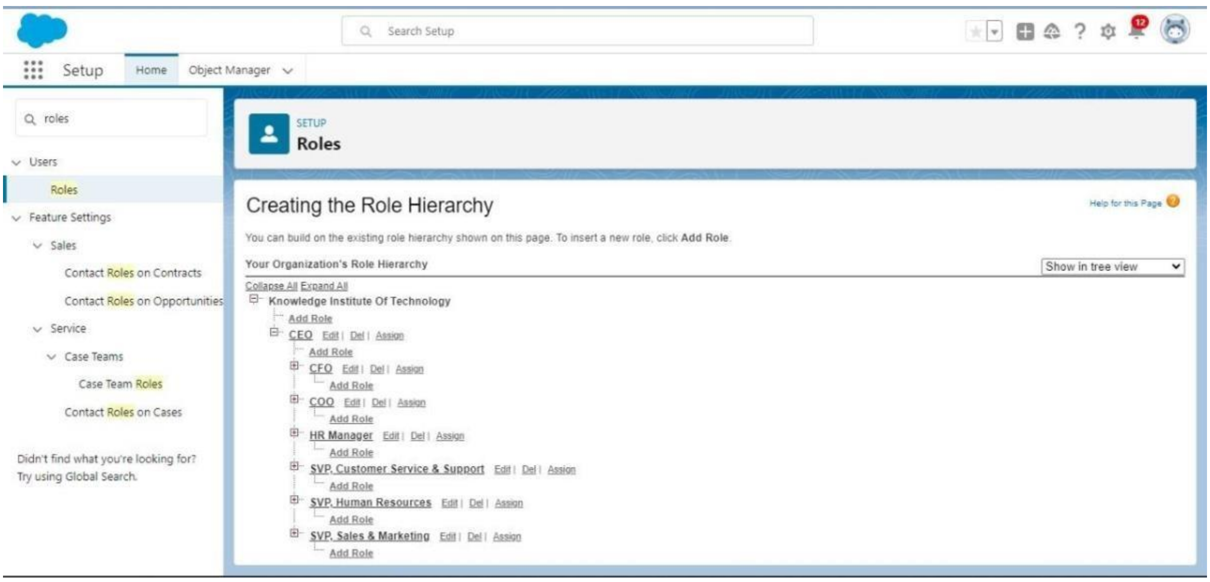
Role

In Salesforce, roles are used to determine which users have access to certain data and functions within the system. They are also used to define the reporting hierarchy within an organization. Users with higher roles have greater access to data and more control over the system **1)Creation of Role**

1.From the Quick find box search for the role and click on the roles option

2.select the set-up roles option

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



User

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.

1)To Create A User

1.From Setup, enter Users in the Quick Find box, then select Users.

2.Click New User.

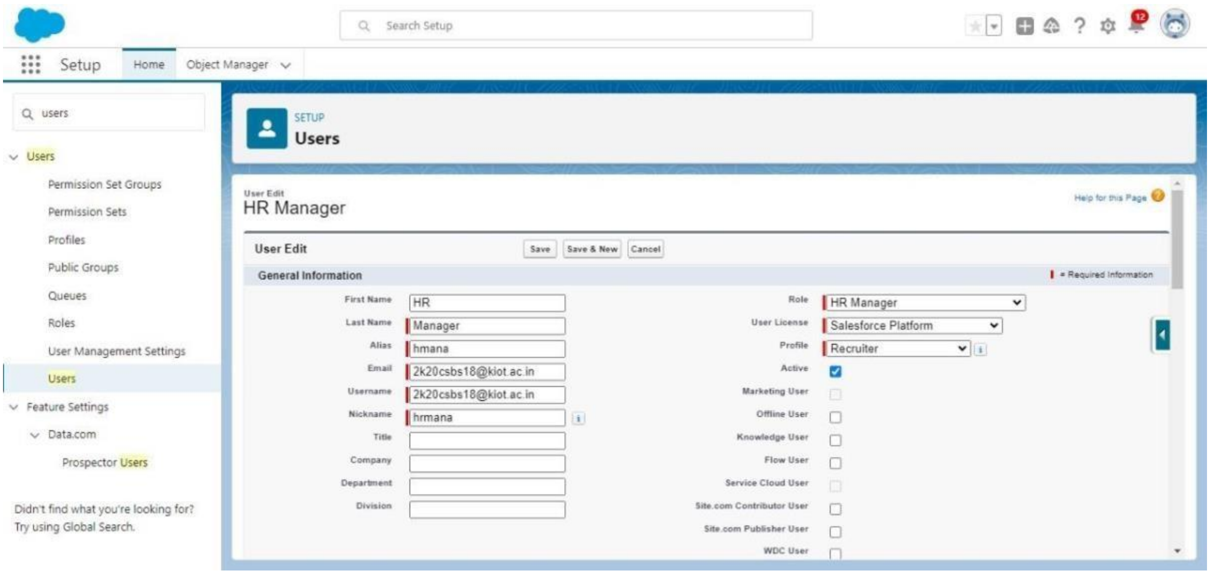
3.Enter First name as HR and last name as Manager.

4.Enter the user’ s name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.

5.Then create a new role HR Manager.

6.Select user License as Standard Platform User.

7.Select profile (Recruiter).



8.Click save

2)To Create A User

1.From Setup, enter Users in the Quick Find box, then select Users.

2.Click New User.

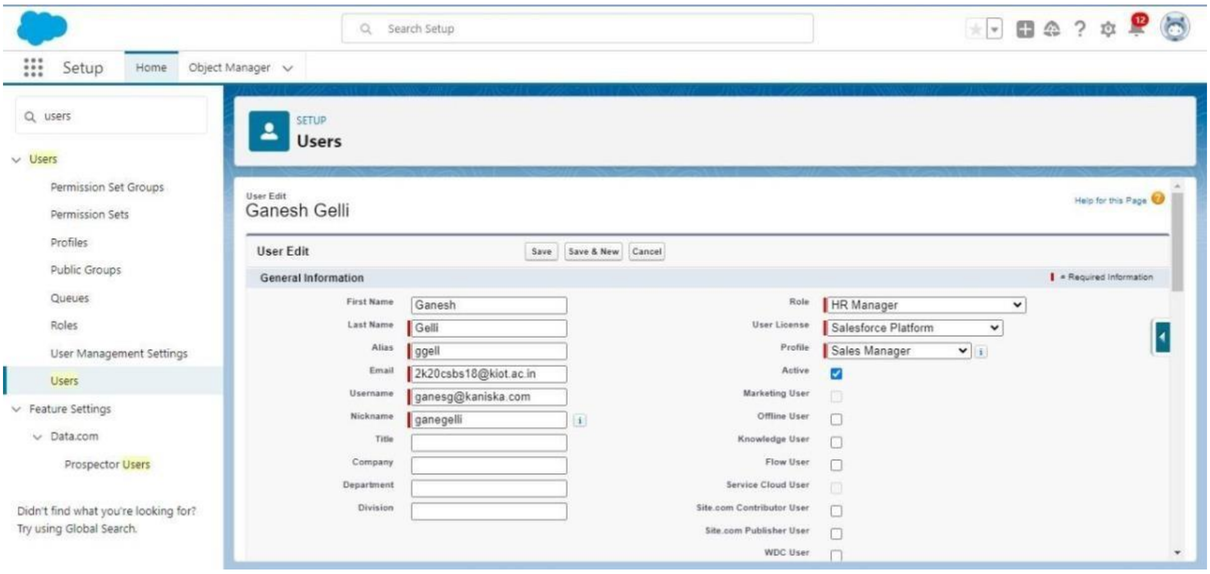
3.Enter First name as Ganesh and last name as Gili.

4.Enter the user’ s name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.

5.Then create a new role HR Manager.

6.Select user License as Standard Platform User.

7.Select profile (Sales Manager).



8.Click save

Sharing Rules

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

1.Owner-based Sharing Rules

2.Criteria-based Sharing Rules

1)Create A Sharing Rule

1.Go to Sharing Settings, which can be found under the Quick Find section.

2.Scroll down and find the candidate object where a sharing rule needs to be added, and then click on New to create a new sharing rule.

3.Add the label of the sharing rule you want to make.

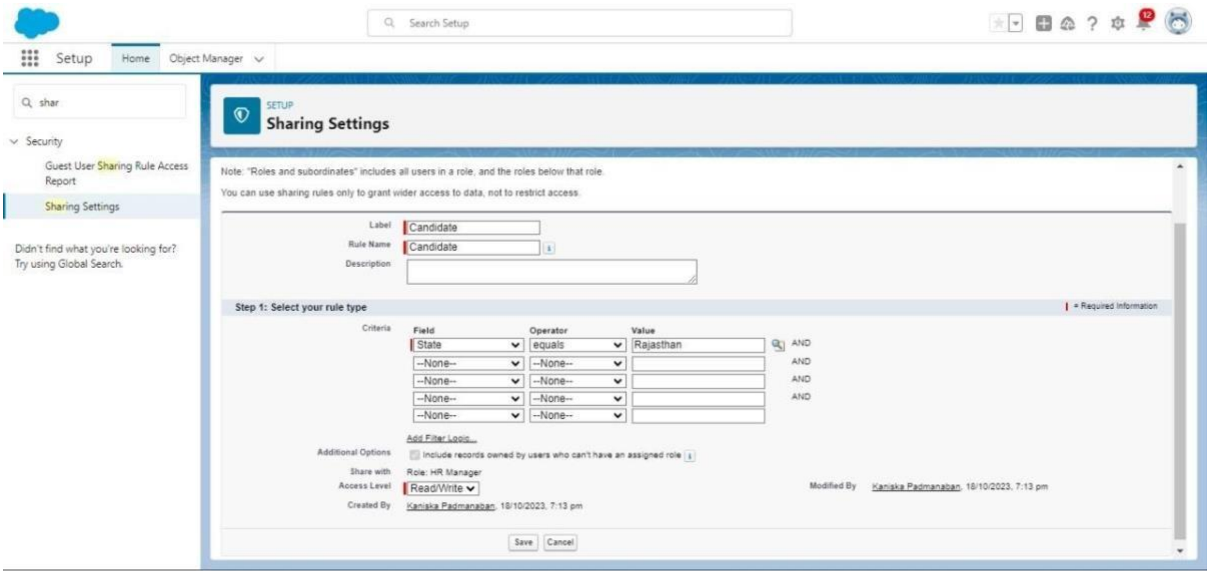
4.Select your rule type based on the criteria.

5.Select the field can join immediately check field from the candidate object.

6.Select the State as equal and value is Rajasthan.

7.And in selecting the users to share with the section select roles and in that select Hr Manager.

8.And in the section of select the level of access for the users give the access Read/Write. 9.And save the rule.



2)Activity 2

Create a Sharing Rule to Share the records of Job Application to Hr Manager with the Access of Read/Write.

Create A Sharing Rule

1.Go to Sharing Settings, which can be found under the Quick Find section.

2.Scroll down and find the Job Application object where a sharing rule needs to be added, and then click on New to create a new sharing rule.

3.Add the label of the sharing rule you want to make.

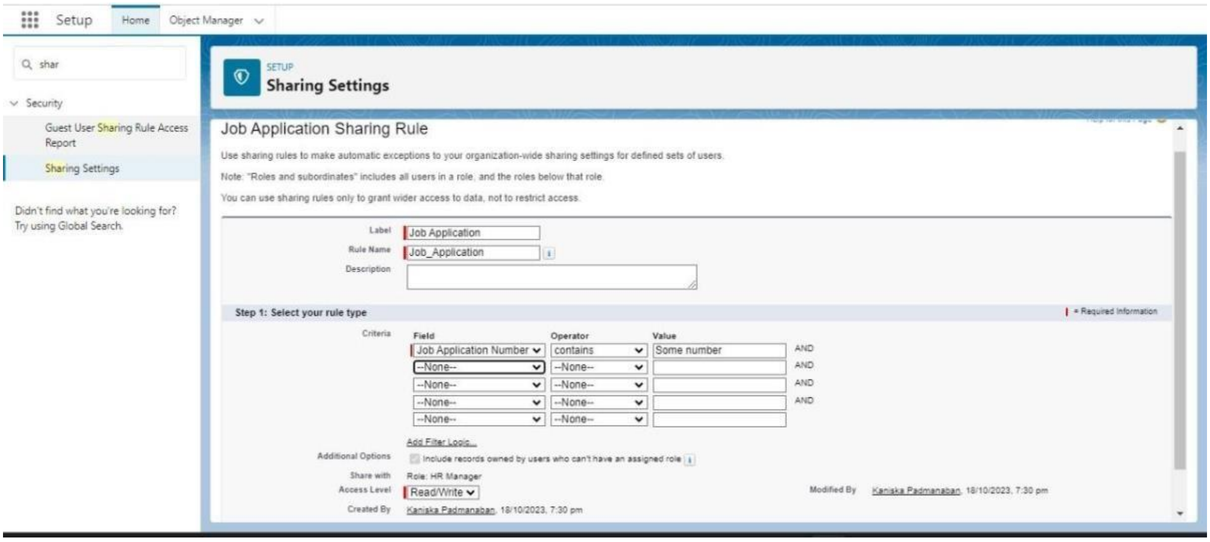
4.Select your rule type based on the criteria.

5.Select the field can join immediately check field from the Job Application object.

6.Job application number contains some number.

7.And in selecting the users to share with the section select roles and in that select Hr Manager.

8.And in the section of select the level of access for the users give the access Read/Write. 9.And save the rule.



5.AUTOMATION

Flow:

Flows in Salesforce, a flow is a tool that automates complex business processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows. Flow Builder can be used to build code-like logic without using a programming language. Flows fall into five categories:

1.Screen Flows

2.Schedule-Triggered Flows

3.Autolaunched Flows

4.Record-Triggered Flows

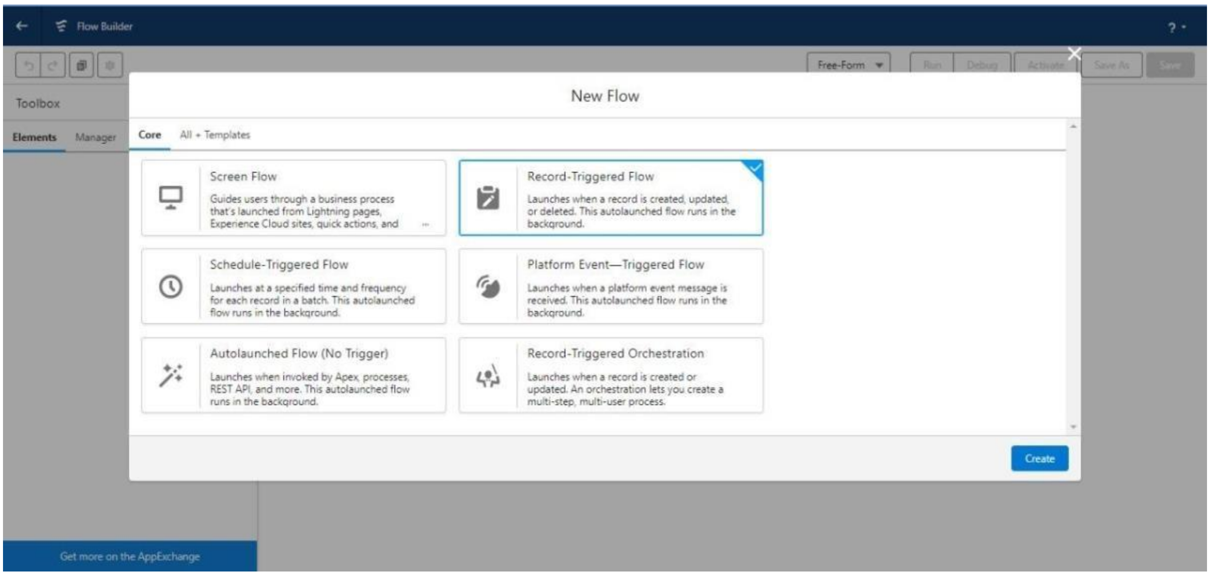
5.Platform Event-Triggered Flows

1)Create A Record Trigger Flow on Job Object

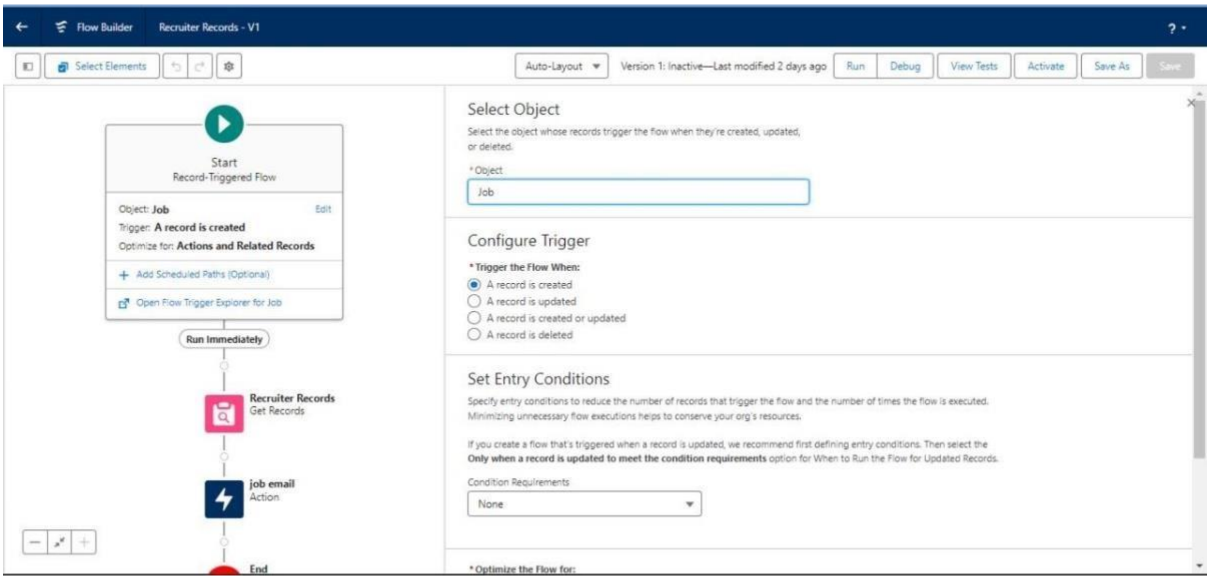
1.Click on Gear icon and select setup

2.In Quick find Box enter flow and select the flows

3.Click on New flow and Select Record triggered Flows.



4.In the search bar type job and click done.



5.Add an element called Get record.

6.Label name as Recruiter Records.

7.Select the object as Recruiter.

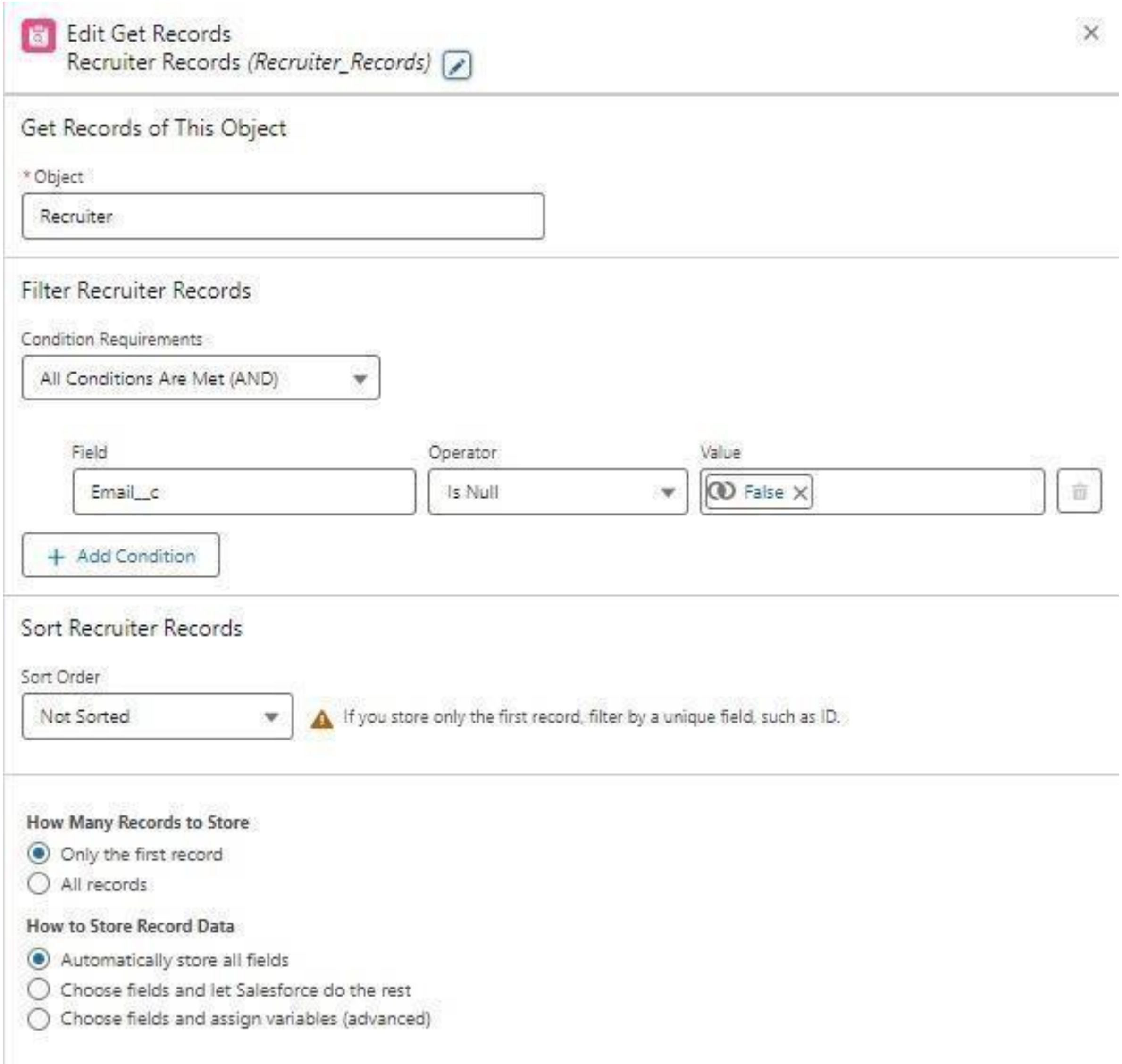
8.After entering the object follow the steps.

10.Conditional requirements should be all conditions are met (AND).

11.Select the field as Recruiter_Email__c.

12.Operation should be Is Null.

13.Value should be False. And click done.



14.Add another element called Action.

15.Click on the Action and start creating new action

16.Select the action as Send Email.

17.Enter the label name job email, API name is auto populated.

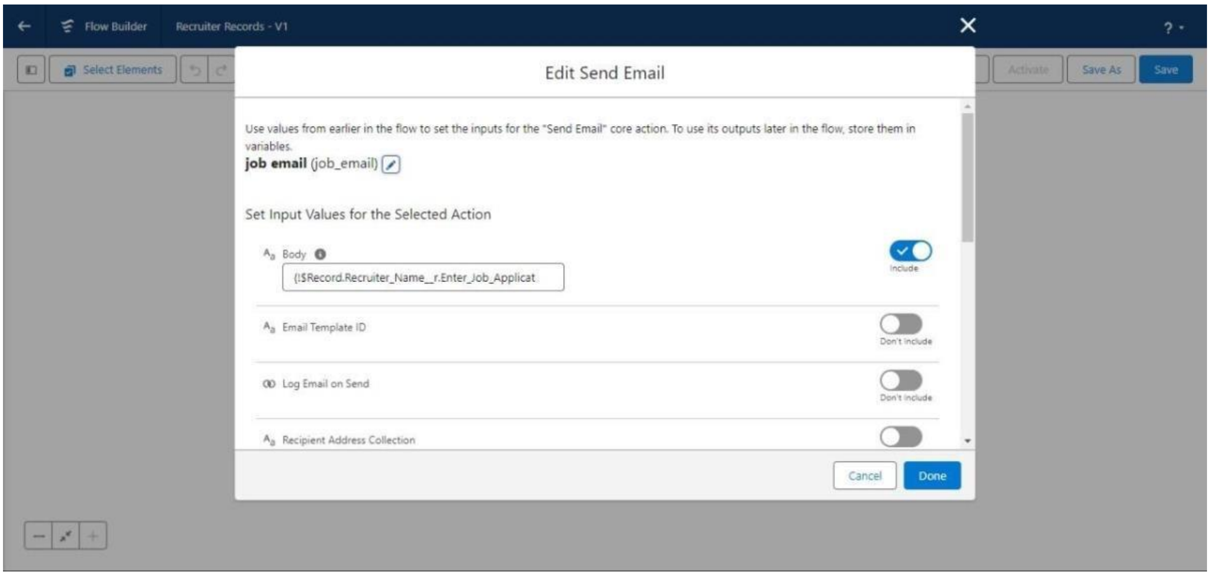
18.Set input values as

a. Body: {!$Record.Name} with {!$Record.Job_Application_Id__c} is available. Please find the suitable candidates for the position.

b. Subject: {!$Record.Name}

19.Recipient Email Addresses (comma-separated) should be included for that turn it on.

20.Recipient Email Addresses:
{!$Record.Recruiter_Name__r.Recruiter_Email__c}



21.Click on done.

22.After the completion of flow, check whether the flow is running and click save.

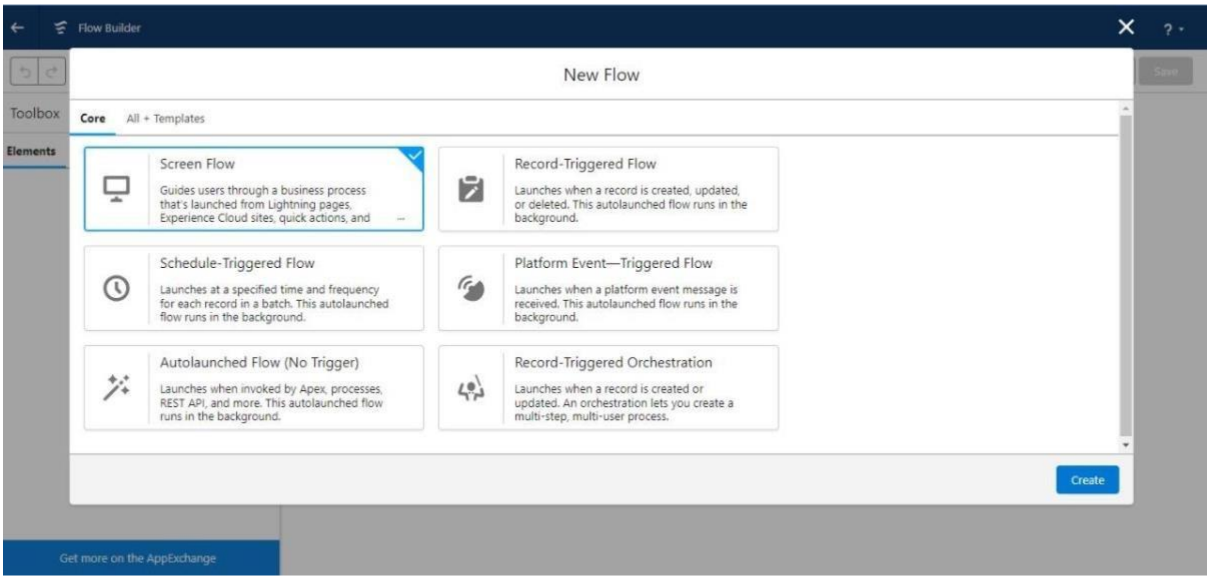
23.And Activate the flow.

2)Create Another Flow

1.Click on Gear icon and select setup

2.In Quick find Box enter flow and select the flows

3.Click on New flow and Select Screen Flows.



4.Add an element called screen.

5.Screen label should be Candidate details.

6.API name is auto populated.

7.Add the components in canvas.

8.Select the text from the components.

9.Label name as Candidate name.

10.API name is auto populated.

11.Select the text area from the components.

12.Label name as Address.

13.API name is auto populated.

14.Select the email from the components.

15.Label name as Email.

16.API name is auto populated.

17.Select the Phone from the components.

18.Label name as Phone.

19.API name is auto populated.

20.Select the picklist from the components.

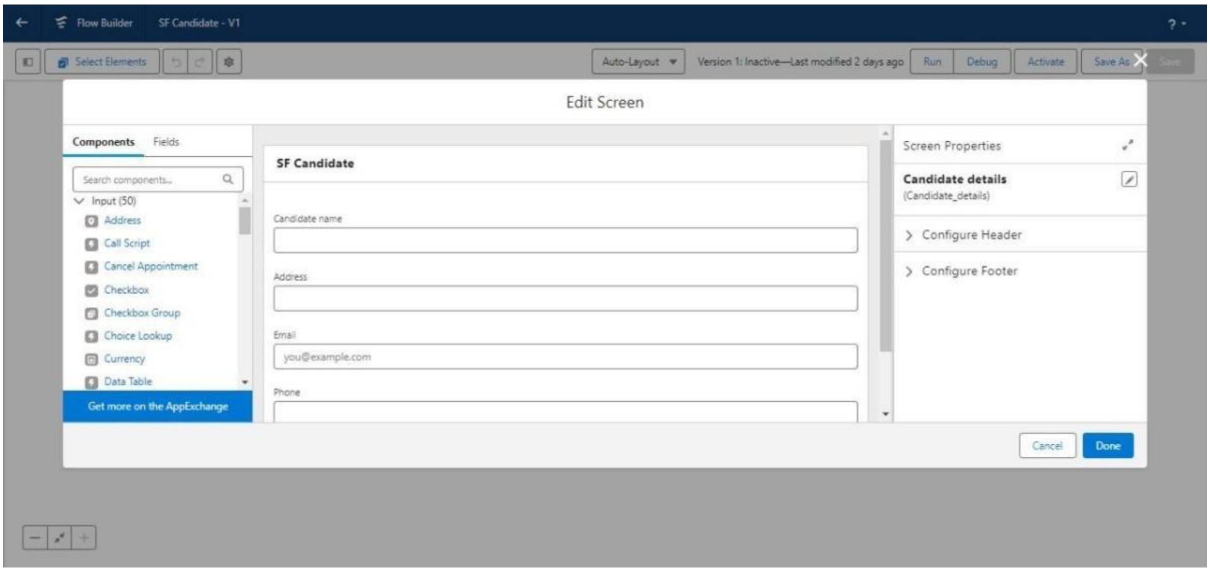
21.Label name as Education.

22.API name is auto populated.

23.And select the choice as {!pick}.

24.Add a header to the canvas candidate flow for job application.

25.Click on save.



26.Next, add another element called create record.

27.Label name should be Create candidate record.

28.API is auto populated. and change the How to Set the Record Fields to Use separate resources, and literal values.

29.Select the object Candidate1.

30.Set the values for the candidate1 as

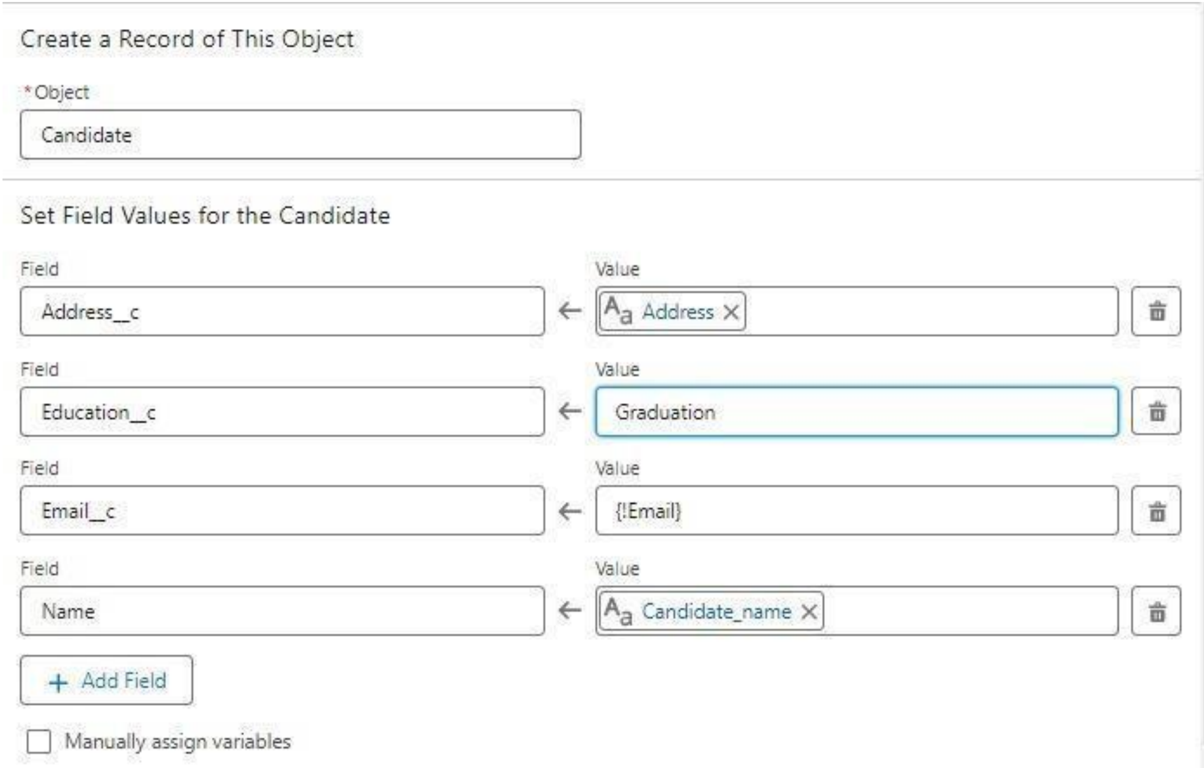
31.Field is Address__c and value should be {!Address}.

32.Field is Education__c and value should be {!Education}.

33.Field is Email__c and value should be {!Email.value}.

34.Field is Name and value should be {!Candidate_name}.

35.After that click on done.



36.Run the flow and check whether the flow is working and click on save.

37.And activate the flow.

6.REPORTS & DASHBOARD

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.

1)Create A Report

1.Create a report that displays rating of the account and which has type and account name.

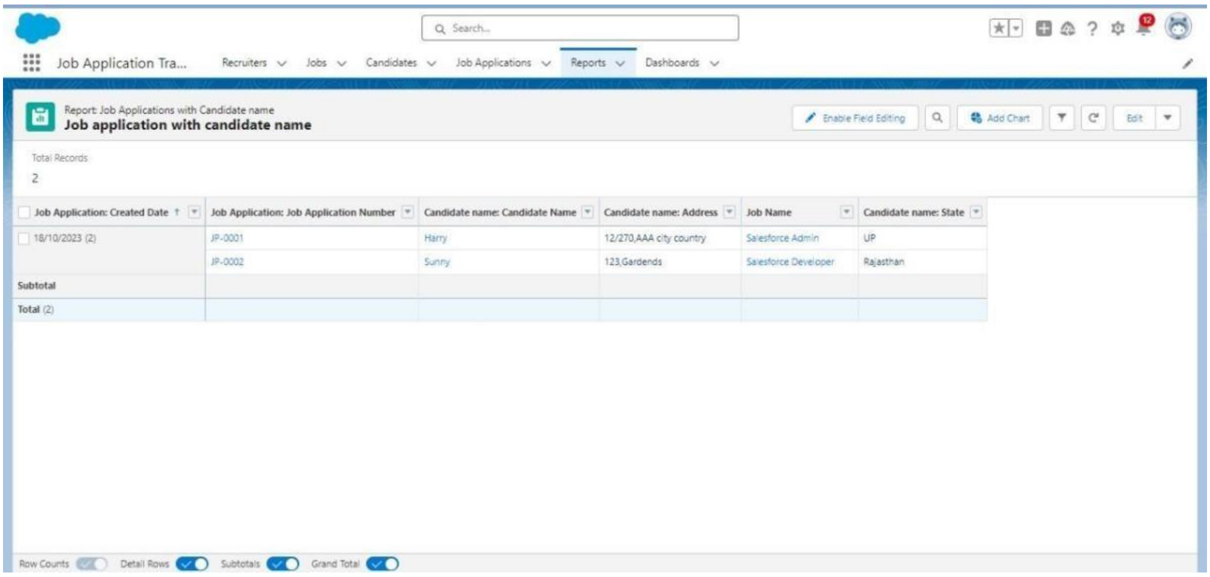
2.Click on app launcher search for reports.

3.Click on the new report and select the category has job application with candidate name.

4.In the details section select the option start report.

5.show me my job application and job application created date (All time)

6.In the outline pane, group rows select job application created date.



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

Dashboard

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

1)Create A Dashboard

1.Click the Dashboards tab.

2.Click New Dashboard.

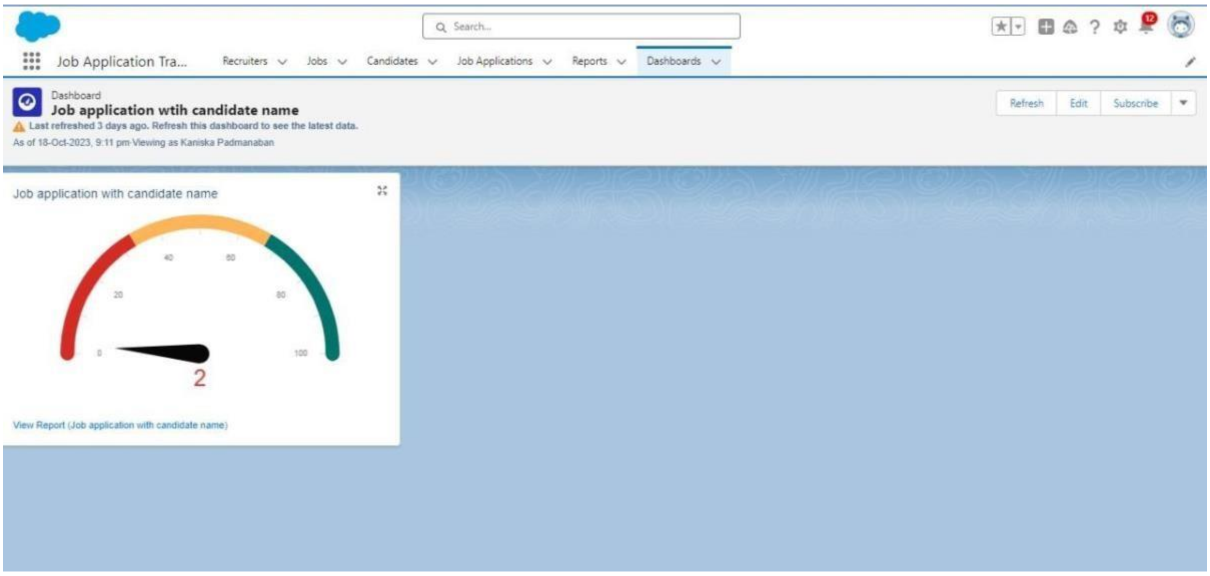
3.Name the dashboard Job application with candidate name and click Create.

4.Click +Component.

5.Select the Job application with candidate name and click Select.

6.Select the Gauge chart and click Add.

7.Click Save and then Done.



GitHub & Project Video Demo Link

1.GitHub Link- **https://github.com/Vinitha1011/Naan-Mudhalvan-SFD-NM2023TMID02917-MECWKarthickka-mecw.org**

2.Video Demo Link-

https://drive.google.com/file/d/1LIqb7KeD0j3sw9R1A7h6V7MC5VEfLW8x/view?usp=drivesdk