

**CHIKKANNA GOVRNMENT ARTS COLLEGE**  
**TIRUPPUR-641602**

(AFFILIATED TO BHARATHIYAR UNIVERSITY)



**BACHELOR OF SCIENCE IN PHYSICS**

Naan mudhalvan project title: **RETAIL MANEGEMENT APPLICATION  
USING SALESFORCE**

**Submitted by**

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# **NAAN MUDHALVAN PROJECT WORK**

**TITLE: Recruiting Assistant for HR Managers**

This is to certify that this is a Bonafide record of work done by the above students of III B.Sc. PHYSICS Degree NAAN MUDHALVAN PROJECT during the year 2023

Submitted for the Naan Mudhalvan project work held on 21.04.2023

**MENTOR**



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# **INTRODUCTION:**

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.

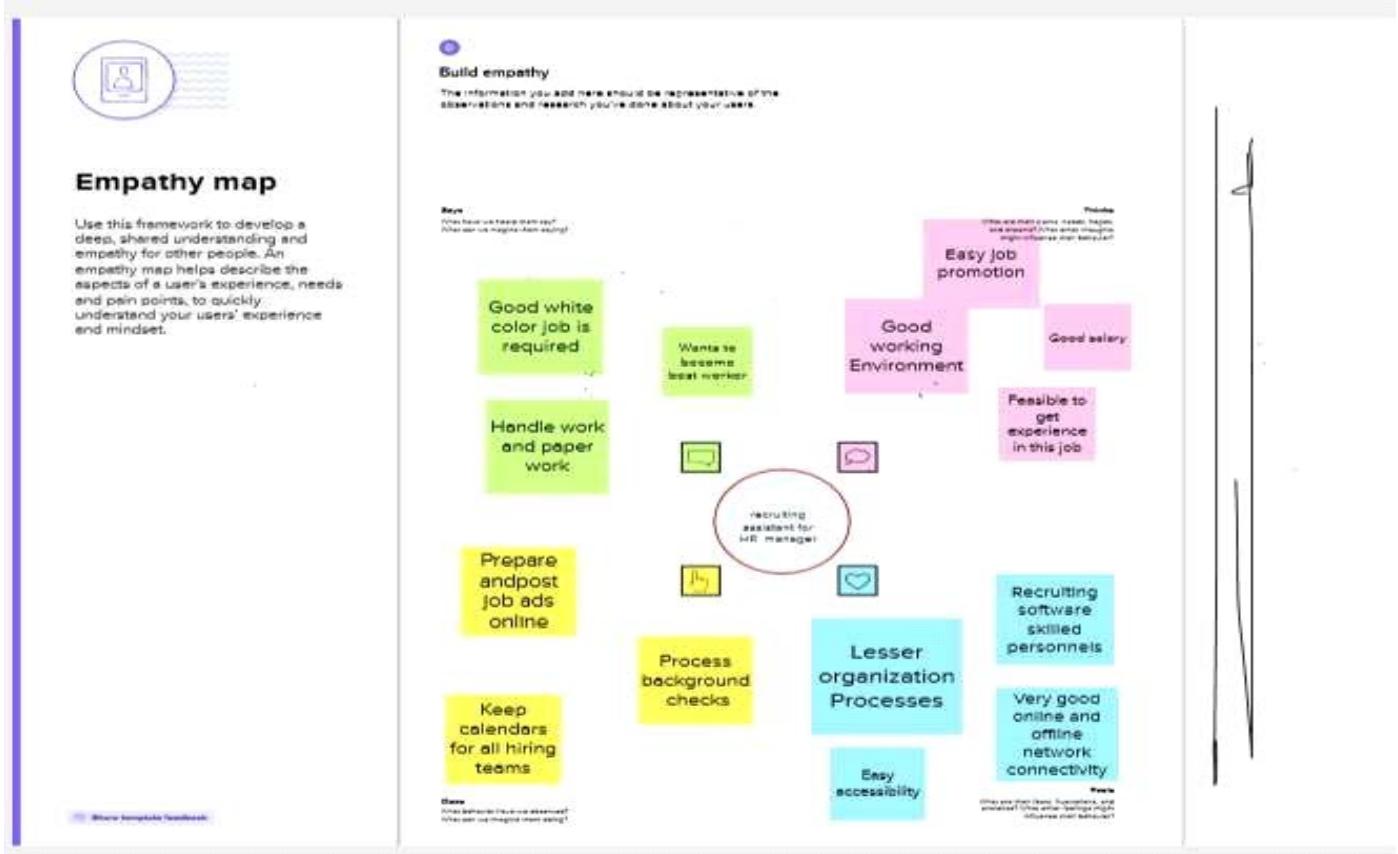
## **Overview:**

The Recruitment Process in human resource management starts with identification of job vacancy in the organization, later the HR department analyses the job requirement, review the job application, screen and shortlist the desirable candidates and the process ends with hiring of right and best candidate for the job.

## **Purpose:**

HR Recruiter responsibilities include sourcing candidates online, updating job ads and conducting background checks. If you have experience with various job interview formats, including phone screenings and group interviews, and can help us recruit faster and more effectively, we'd like to meet you.

# PROBLEM DEFINITION AND DESIGN THINKING EMPATHY MAP



## BRAIN STORMING :

Rajkumar N

Easy recruitment process	Effective Application tracking system	Timely announcements

Pugazhenthi R

Attracts candidates to recruit from student level	Approach colleges to student manifesto	Promoting online tracking feasibility

Rajkumar V

Developing Mobile App for applications	Less Application cost	Offline application mode

Rangasamy K

Interview process feasibility	Transparent candidate selection process	Prerequisite skill requirements

Person 5


Person 6


Person 7


Person 8


# 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 free salesforce developer account.

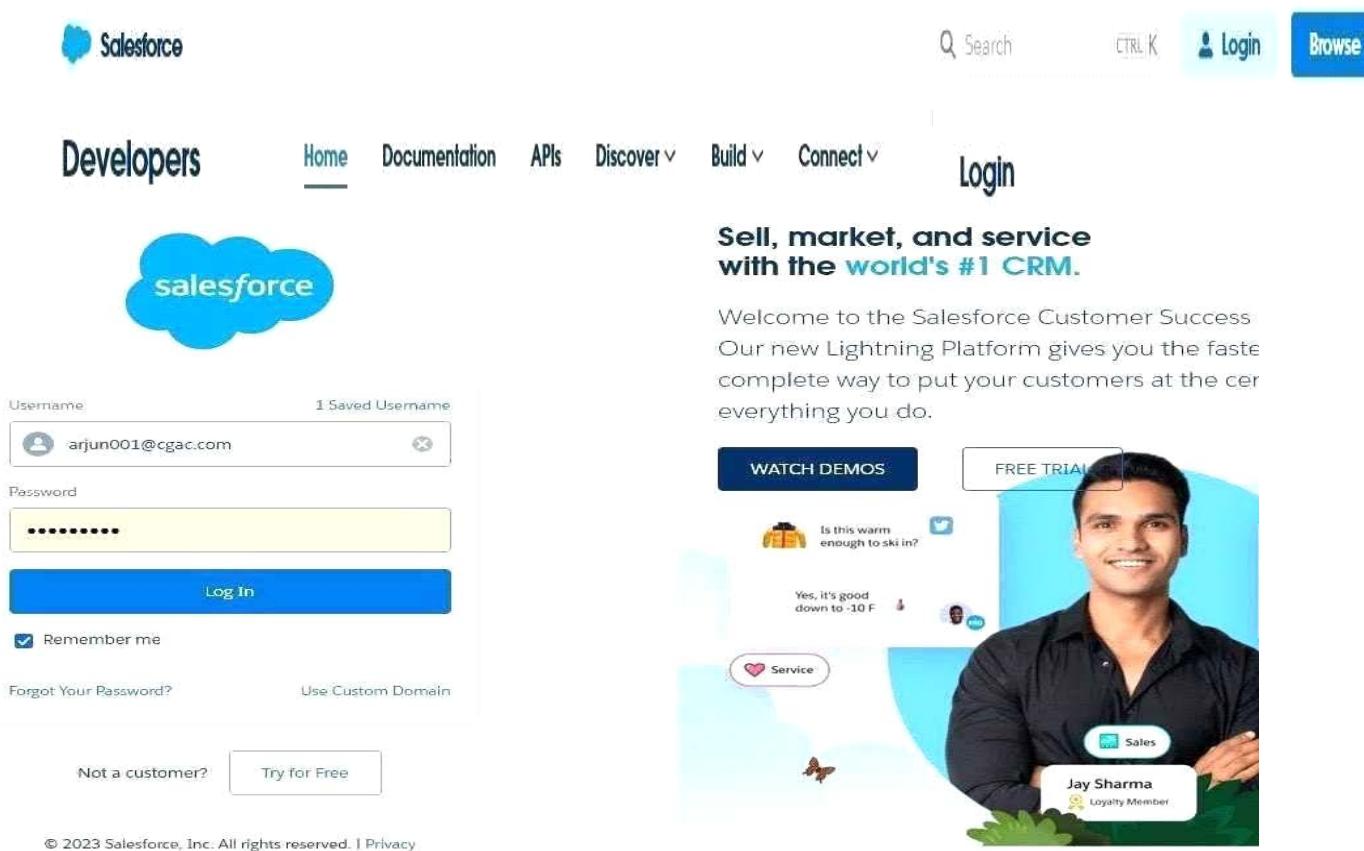
## Activity-1

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

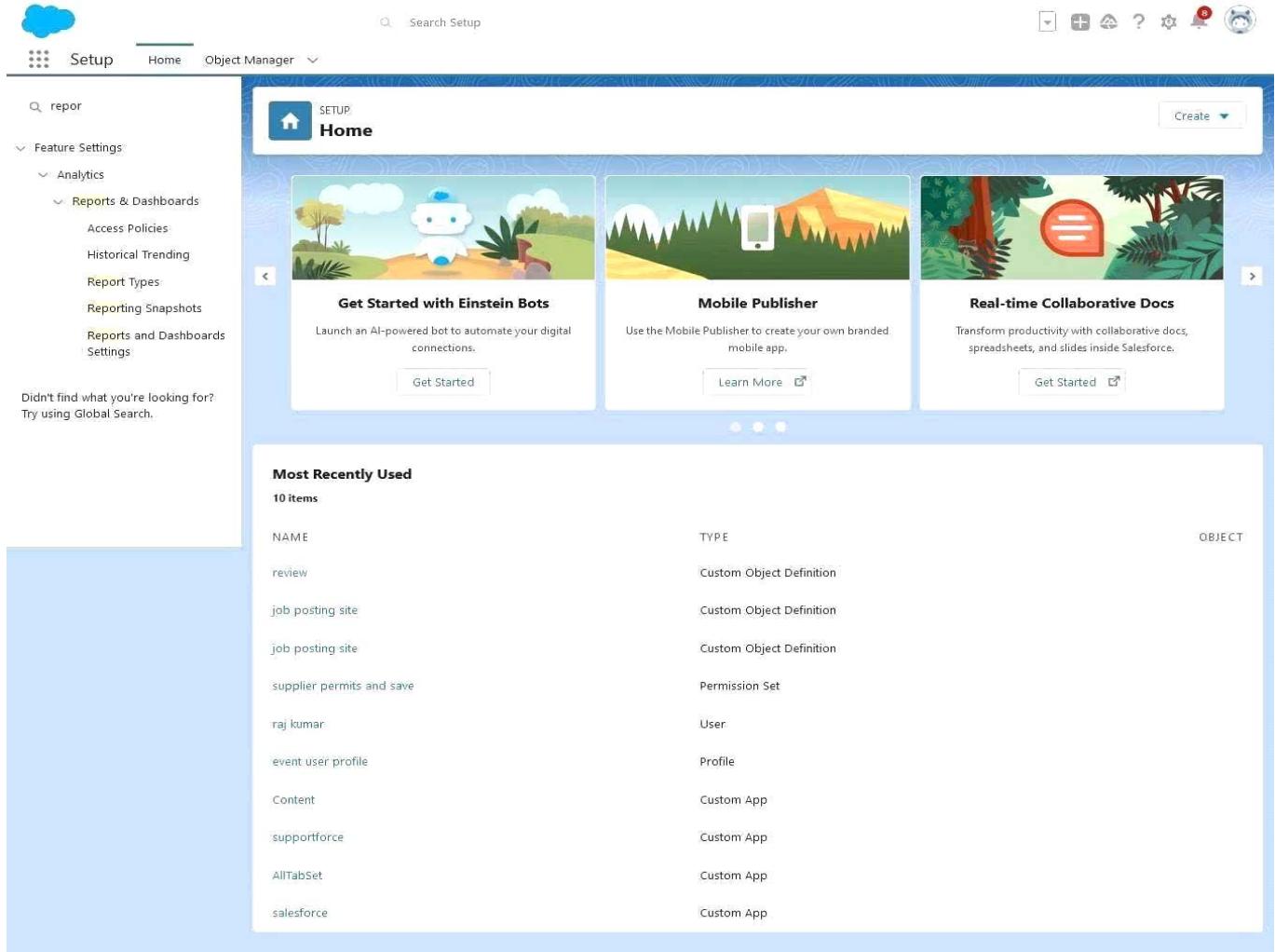
- Search Developer.salesforce.com
- Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.
- Click sign me up, after a few min you will reserve a mail salesforce org and by using the verify account link you can create your new password.

The screenshot shows a web-based application interface for 'Smart Internz'. At the top, there's a navigation bar with icons for Home, Projects, and Support. The main area is titled 'Project Workspace' and displays project details: Project Title (Recruiting Assistant For HR Managers), NM Id (7CCB794026285D3B0194BB6BE39105E8), and Industry Mentor(s) Name (Mentor-Salesforce). A progress bar indicates 'Project Progress' at 5%. Below this, there are buttons for 'Demo Link', 'View Mentor Comments' (with 0 notifications), and 'View Industry Mentor Comments' (with 0 notifications). The interface is divided into sections: 'PROJECT DETAILS', 'TASK & PROGRESS', and 'MENTOR REVIEW'. Under 'PROJECT DETAILS', there are tabs for 'Team Tasks' and 'My Tasks'. A large section titled 'CREATION OF DEVELOPER ACCOUNT' is visible. At the bottom, there's a sidebar with a tree view of 'PACKAGE INSTALLATION' components: OBJECT, TAB, FIELDS, JUNCTION OBJECT, PAGE LAYOUT, VALIDATION RULES, PROFILE, USER, PERMISSION SET, and REPORTS.

- Click save.
- Search login.salesforce.com
- 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

- Click the install a package tab.
- Paste 04t0P000000N9rs into the field.
- Click install.
- Select install for admins only,



### 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:

- From setup click on object manager.
- Click create, select custom object.
- Fill in the label as "Job Posting Site".
- Fill in the plural label as "Job Posting Sites".
- Record name: "Site Name"
- Select the data type as "Text".
- In the Optional Features section, select Allow Reports and Track Field History.
- In the Deployment Status section, ensure Deployed is selected.
- In the Search Status section, select Allow Search.
  - 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 the successfully create a custom object for job posting site is done.

## **Activity-2**

Create a custom object for reviews To create a custom object, follow these steps :

- From setup click on object manager.
- Click create, select custom object.
- Fill in the label as "Review".
- Fill in the plural label as "Reviews".
- Record name : "Review Number" .
- Select the data type as "Auto Number".
- Under display format enter "REV-{0000}".
- Enter the starting number as 1.
- In the Optional Features section, select Allow Reports and Track Field History.
- In the Deployment Status section, ensure Deployed is selected.
- In the Search Status section, select Allow Search.

- In the Object Creation

Options section, select Add Notes and Attachments related list to default page layout.

- Leave everything else as is, and click Save.

The screenshot shows the Salesforce Setup interface for creating a new custom object. The title bar reads "New Custom Object | Salesforce". The main page is titled "New Custom Object".

**Custom Object Information:**

- Label: Review (Example: Account)
- Plural Label: Reviews (Example: Accounts)
- Starts with vowel sound:
- Object Name: Review (Example: Account)
- Description: (Empty text area)
- Content Name: (Empty dropdown menu)

**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 is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name:	Review Number	Example: Account Name
Data Type:	Auto Number	(dropdown menu)
Display Format:	REV-(0000)	Example: A-(0000) What Is This?
Starting Number:	1	(text input field)

**Optional Features:**

- Allow Reports
- Allow Activities
- Track Field History

At the bottom, there is a Windows taskbar with icons for File Explorer, Edge browser, Mail, and Google Chrome. A search bar says "Type here to search".

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The 'Details' tab is active. Under 'Fields & Relationships', the 'Review\_\_c' field is selected, showing its details: API Name, Singular Label, and Plural Label. Other sections like Page Layouts, Record Types, and Validation Rules are also visible.



## Milestone 4 : Tabs

What is Tab?

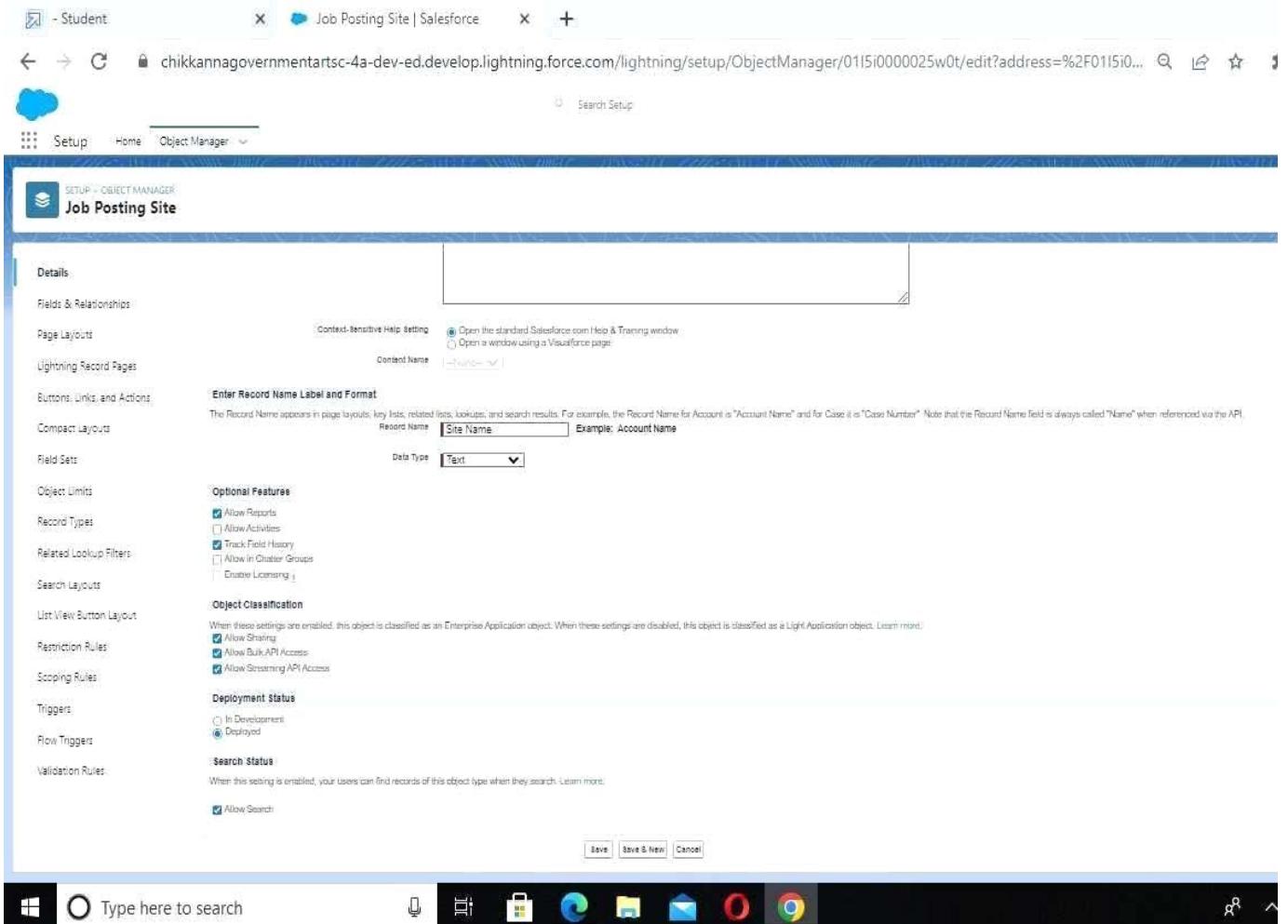
In Salesforce, a tab is a user interface element that allows users to navigate to different sections of the platform, such as Accounts, Contacts, Leads, and Opportunities. Tabs can also be used to access custom objects and custom pages. They are typically located at the top of the screen and can be customized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

## Activity:

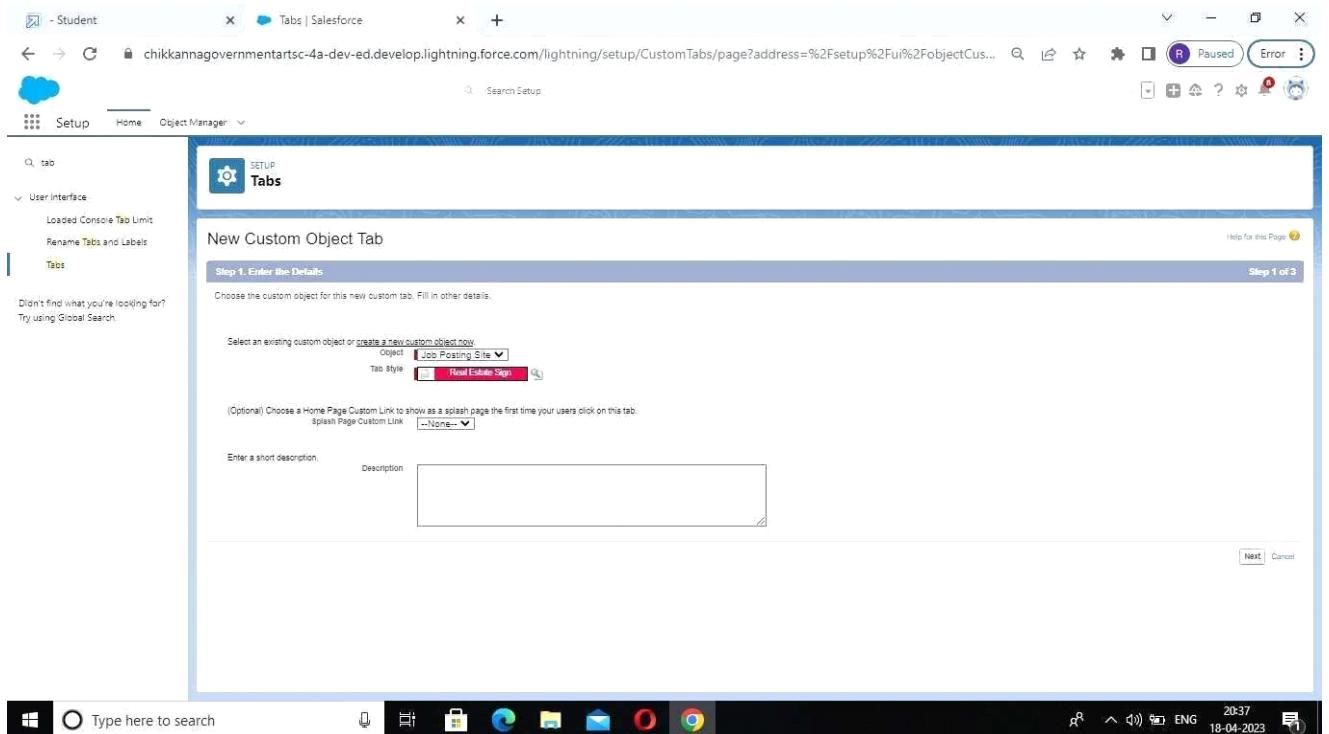
### How to create a tab

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:

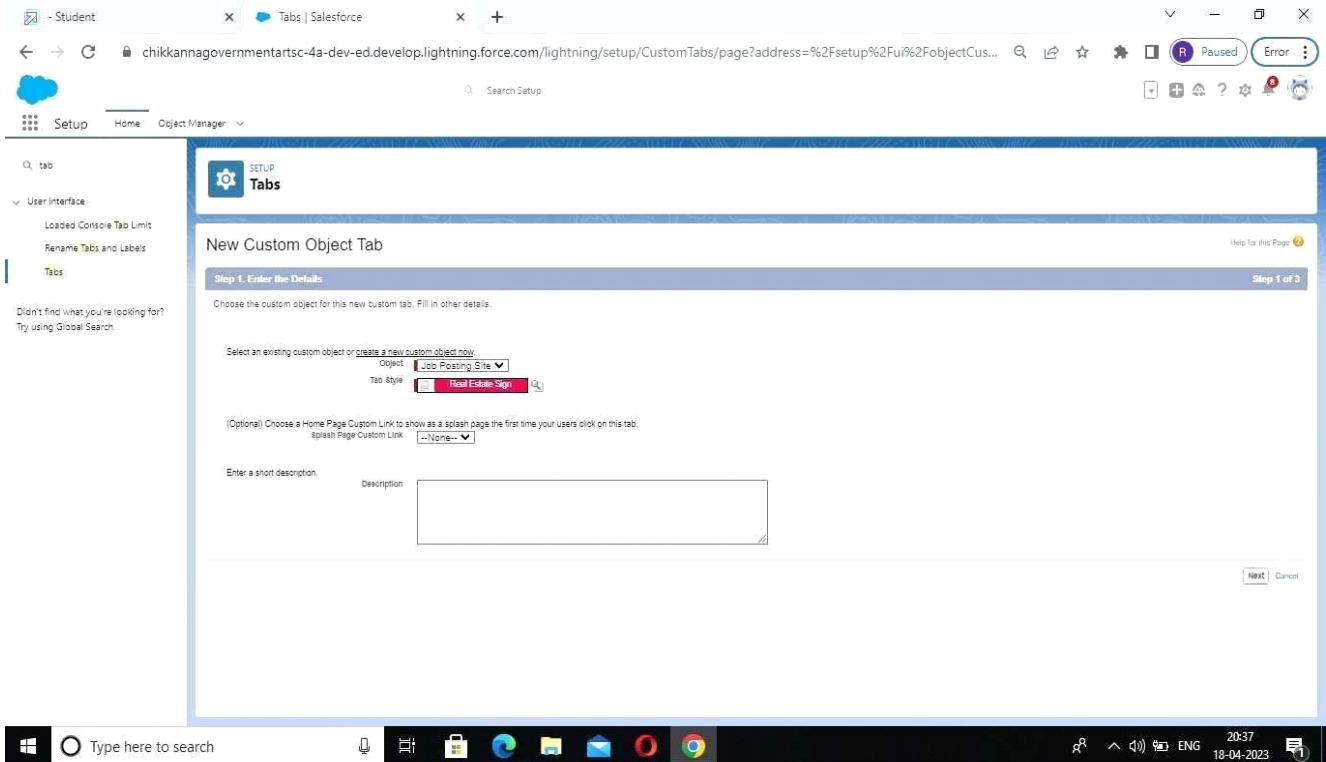
- To Select the Tab Style: Click the magnifying glass and select Real Estate



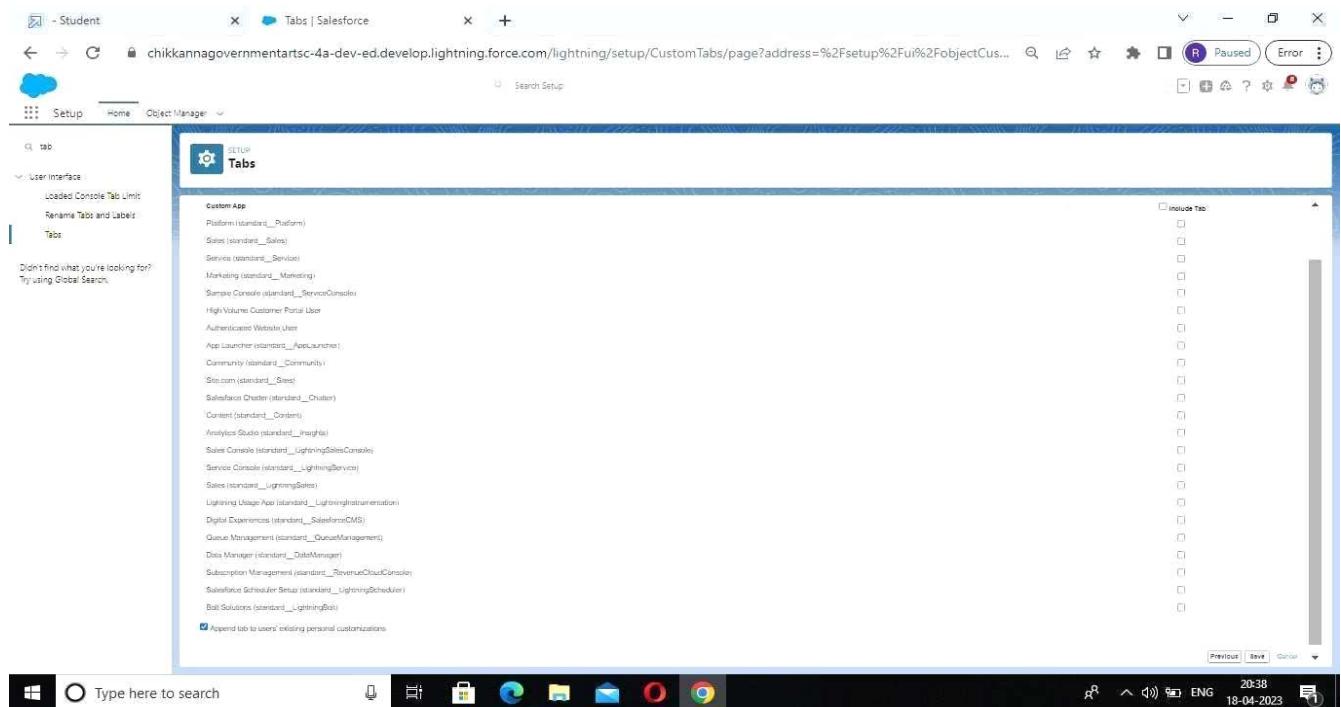
- Click Next.



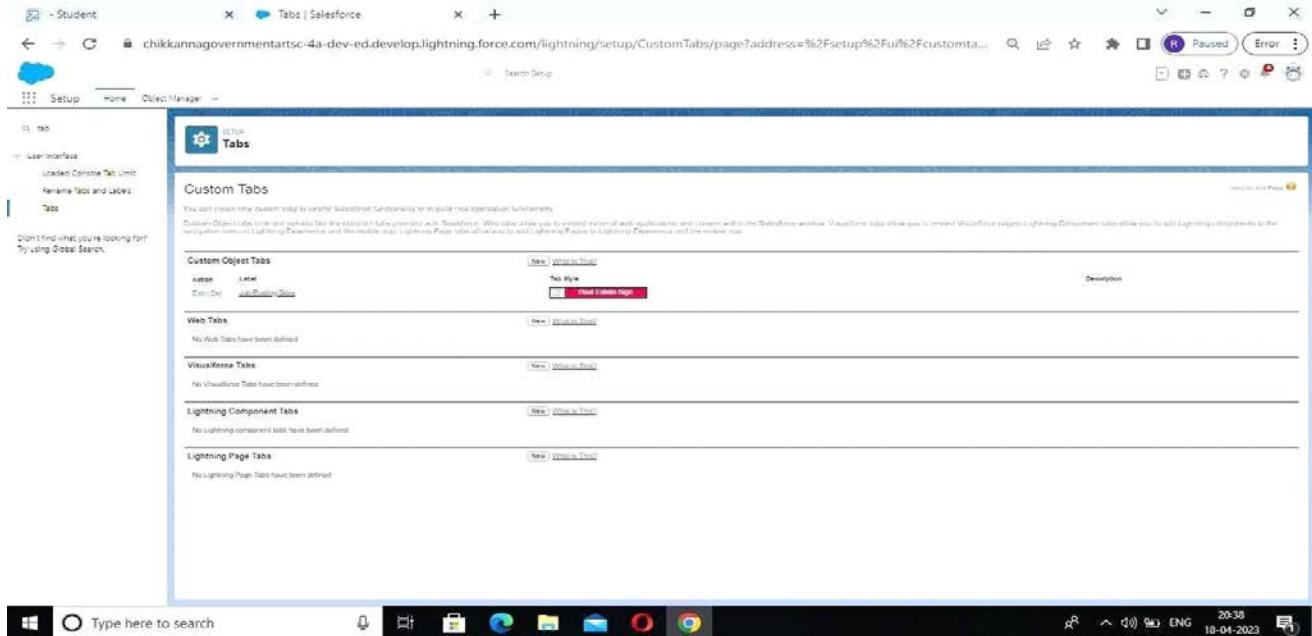
- Leave the profile as is and click Next



- In the Add to Custom Apps section:
- Deselect Include Tab.



- Select Append tab to users' existing personal customizations.
- Click Save.



create a tab is successfully done.

## 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 sales force:

- 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

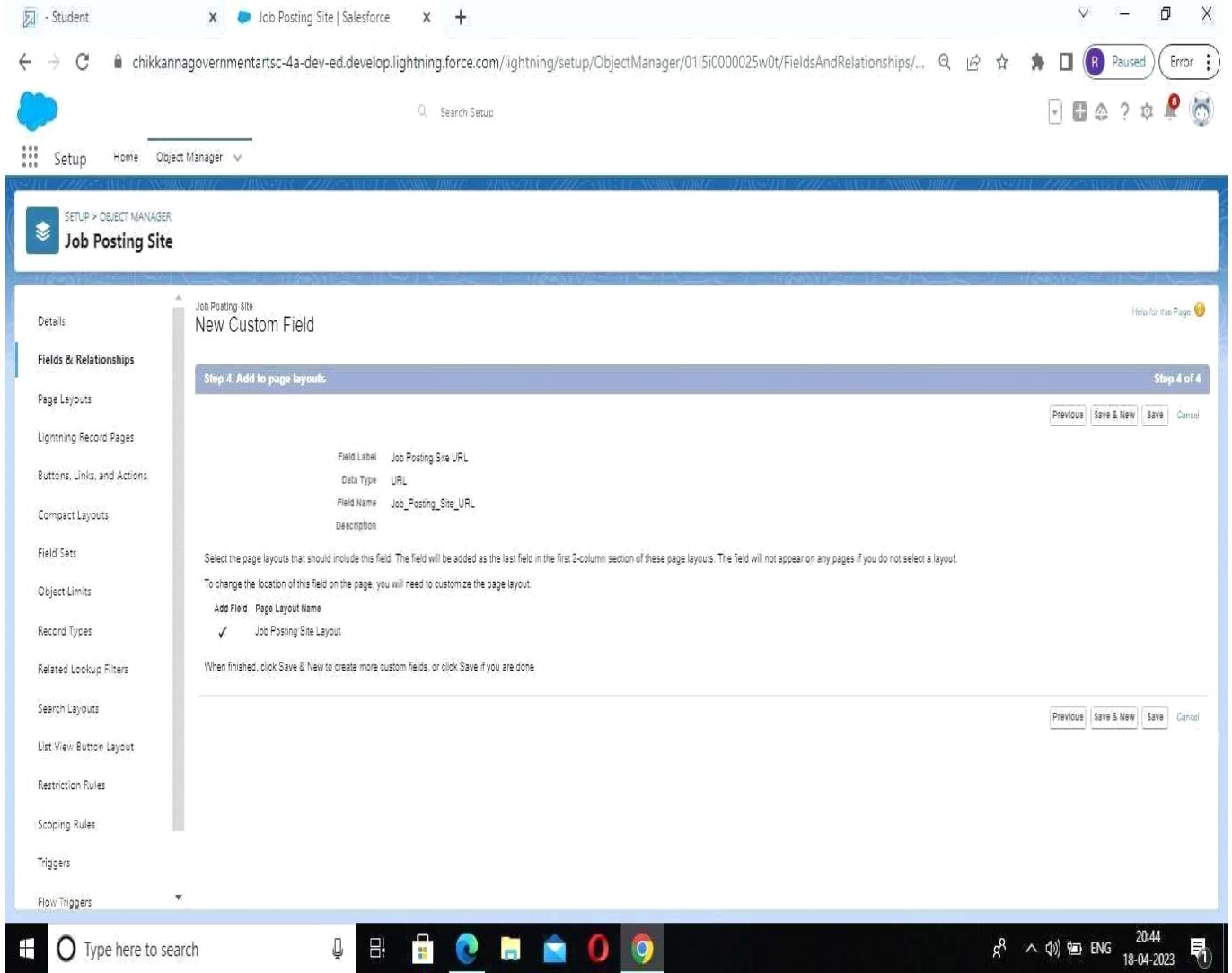
From the object manager, click on the job posting site, then click on Fields& Relationships.

- Click on new.

The screenshot shows the 'Job Posting Site' object setup page in Salesforce. The left sidebar has sections like 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, Scoping Rules, Triggers, Row Triggers, Validation Rules, and URL. The main content area is titled 'Roll-Up Summary' and describes 'Lookup Relationship'. Other sections include 'Master-Detail Relationship', 'External Lookup Relationship', 'Checkbox', 'Currency', 'Date', 'DateTime', 'Email', 'GeoLocation', 'Number', 'Percent', 'Phone', 'Picklist', 'Picklist (Multi-Select)', 'Text', 'Text Area (Long)', 'Text Area (Rich)', 'Text (Encrypted)', and 'Time'. Each section has a detailed description of its functionality.

The screenshot shows the 'New Custom Field' creation screen in Salesforce. The title is 'Job Posting Site' and the sub-section is 'New Custom Field'. The step is 'Step 2. Enter the details'. The 'Field Label' is set to 'Job Posting Site URL', 'Field Name' is 'Job\_Posting\_Site\_URL', and there is no 'Description' or 'Help Text'. Under 'Required', the checkbox 'Always require a value in this field in order to save a record' is checked. Under 'Auto add to custom report type', the checkbox 'Add this field to existing custom report types that contain this entry' is checked. At the bottom, there are 'Show Formula Editor' and 'Next' buttons.

- Click Next.
- For Field Label, enter the Job Posting Site URL.



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

Create New Field for Job Posting site is successfully done.

## Create a Fields for Job Posting site

- **Status**
- **Technical site**
- **Description**
- **Create a Fields for Job Posting site**
- **Status**

- Student Job Posting Site | Salesforce +

chikkannagovernmentartsc-4a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01i5i0000025w0t/FieldsAndRelationships/...

Paused Error

Setup Home Object Manager

SETUP > OBJECT MANAGER Job Posting Site

New Custom Field

Step 2. Enter the details Step 2 of 4

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lockup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules Triggers Flow Triggers

Field Label: Status URL  
Field Name: Status\_URL  
Description:  
Help Text:  
Required:  Always require a value in this field in order to save a record  
 Add this field to existing custom report types that contain this entity  
Default Value: Show Formula Editor  
Use formula syntax. Enclose text and picklist value API names in double quotes ("the\_field"), include numbers without quotes ("123"), and new line characters as line feeds (\n). Use standard date calculations in the formula syntax (TODAY), #1# to reference a field from a Custom Metadata type record via: \${CustomMetadataType\_\_r.Field\_\_c}, or \${CustomMetadataType\_\_r.m...}

Previous Next Cancel

- Student Job Posting Site | Salesforce +

chikkannagovernmentartsc-4a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01i5i0000025w0t/FieldsAndRelationships/...

Paused Error

Setup Home Object Manager

SETUP > OBJECT MANAGER Job Posting Site

New Custom Field

Step 4. Add to page layouts Step 4 of 4

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lockup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules Triggers Flow Triggers

Field Label: Status URL  
Data Type: URL  
Field Name: Status\_URL  
Description:  
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.  
To change the location of this field on the page, you will need to customize the page layout.  
Add Field: Page Layout Name:  Job Posting Site Layout  
When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

- Student Job Posting Site | Salesforce +

chikkannagovernmentartsc-4a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01i5i0000025w0t/FieldsAndRelationships/...

Paused Error

Setup Home Object Manager

SETUP > OBJECT MANAGER Job Posting Site

New Custom Field

Step 4. Add to page layouts Step 4 of 4

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lockup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules Triggers Flow Triggers

Field Label: Status URL  
Data Type: URL  
Field Name: Status\_URL  
Description:  
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.  
To change the location of this field on the page, you will need to customize the page layout.  
Add Field: Page Layout Name:  Job Posting Site Layout  
When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Technical site

Salesforce Setup - Job Posting Site | Salesforce

chikkannagovernmentarts-4a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01150000025w0t/FieldsAndRelationships/...

Setup Home Object Manager

Job Posting Site

New Custom Field

Step 2: Enter the details

Field Label: Technical Site URL

Field Name: Technical\_Site\_URL

Description:

Help Text:

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

Add this field to existing custom report types that contain this entry:

Default Value: [Formula Editor](#)

Previous Next Cancel

20:46 18-04-2023

Salesforce Setup - Job Posting Site | Salesforce

chikkannagovernmentarts-4a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01150000025w0t/FieldsAndRelationships/...

Setup Home Object Manager

Job Posting Site

New Custom Field

Step 3: Add to page layouts

Field Label: Technical Site URL

Data Type: URL

Field Name: Technical\_Site\_URL

Description:

Select the page layouts that should include this field. The field will be added as the last field in the first column section of these page layouts. The field will not appear on any pages if you do not select a layout.

Add Field: Page Layout Name:  Job Posting Site Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

20:47 18-04-2023

## • Description

Salesforce Setup - Job Posting Site | Salesforce

chikkannagovernmentarts-4a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01150000025w0t/FieldsAndRelationships/...

Setup Home Object Manager

Job Posting Site

New Custom Field

Step 2: Enter the details

Field Label: Description URL

Field Name: Description\_URL

Description:

Help Text:

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

Add this field to existing custom report types that contain this entry:

Default Value: [Formula Editor](#)

Previous Next Cancel

20:48 18-04-2023

Create a Fields for Job Posting site is successfully done

Note :

Follow the steps Create the left over fields

- Status
- Technical site
- 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. ,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:**

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:

- From setup, click object Manager.
- Click create, select custom object.

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'Job Posting Site' object. The page lists various fields and their properties:

	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Description URL	Description_URL__c	URL(255)		
Buttons, Links, and Actions	Job Posting Site URL	Job_Posting_Site_URL__c	URL(255)		
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Owner	OwnerId	Lookup(User/Group)		
Object Limits	Site Name	Name	Text(80)		
Record Types	Status URL	Status_URL__c	URL(255)		
Related Lookup Filters	Technical Site URL	Technical_Site_URL__c	URL(255)		
Search Layouts					
List View Button Layout					
Restriction Rules					
Scoping Rules					
Triggers					
Flow Triggers					

- Enter the label as "Job posting".

The screenshot shows the Salesforce Object Manager Edit Custom Object page for the 'Job Posting' object. The page displays the custom object definition:

**Custom Object Definition Edit**

**Custom Object Information**

- Label: Job Posting
- Plural Label: Job Postings
- Starts with vowel sound:

**Object Name**: Job\_Posting

**Description**:

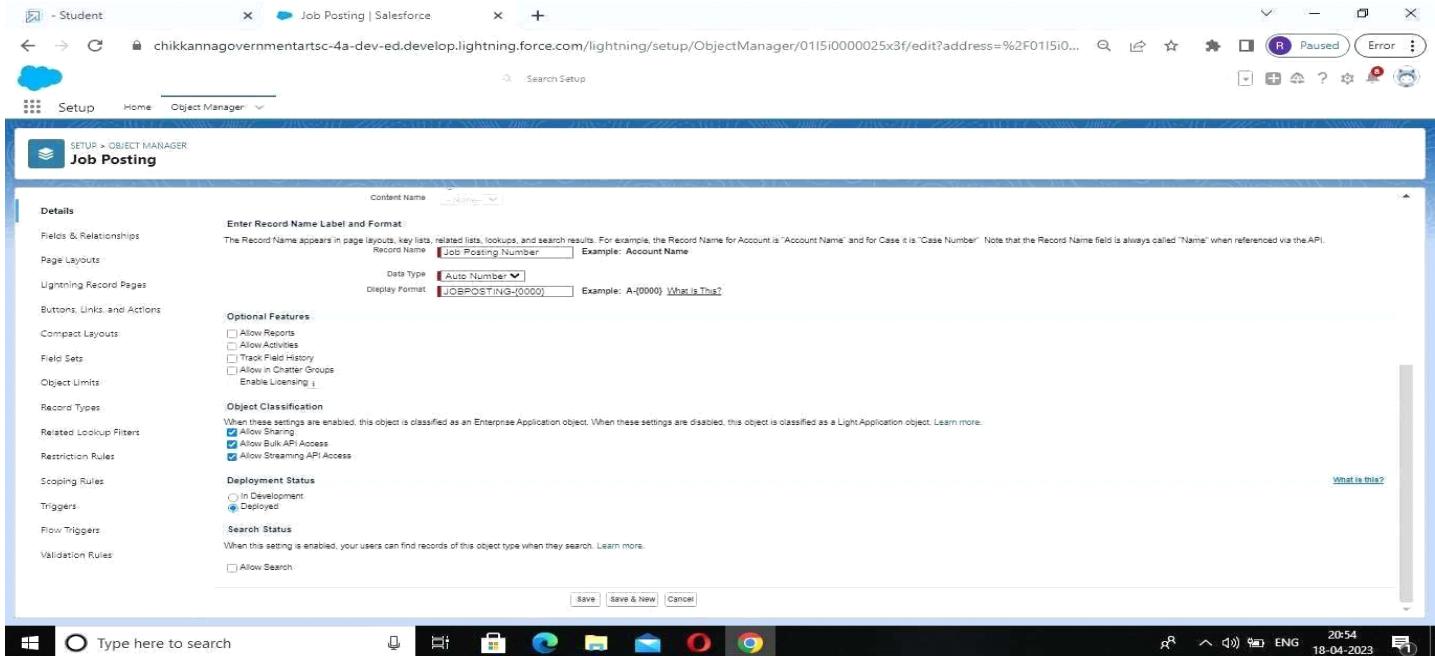
**Context-sensitive Help Setting**:  
Open the standard Salesforce.com Help & Training window  
Open a window using a Visualforce page

**Record Name**: Job Posting Number

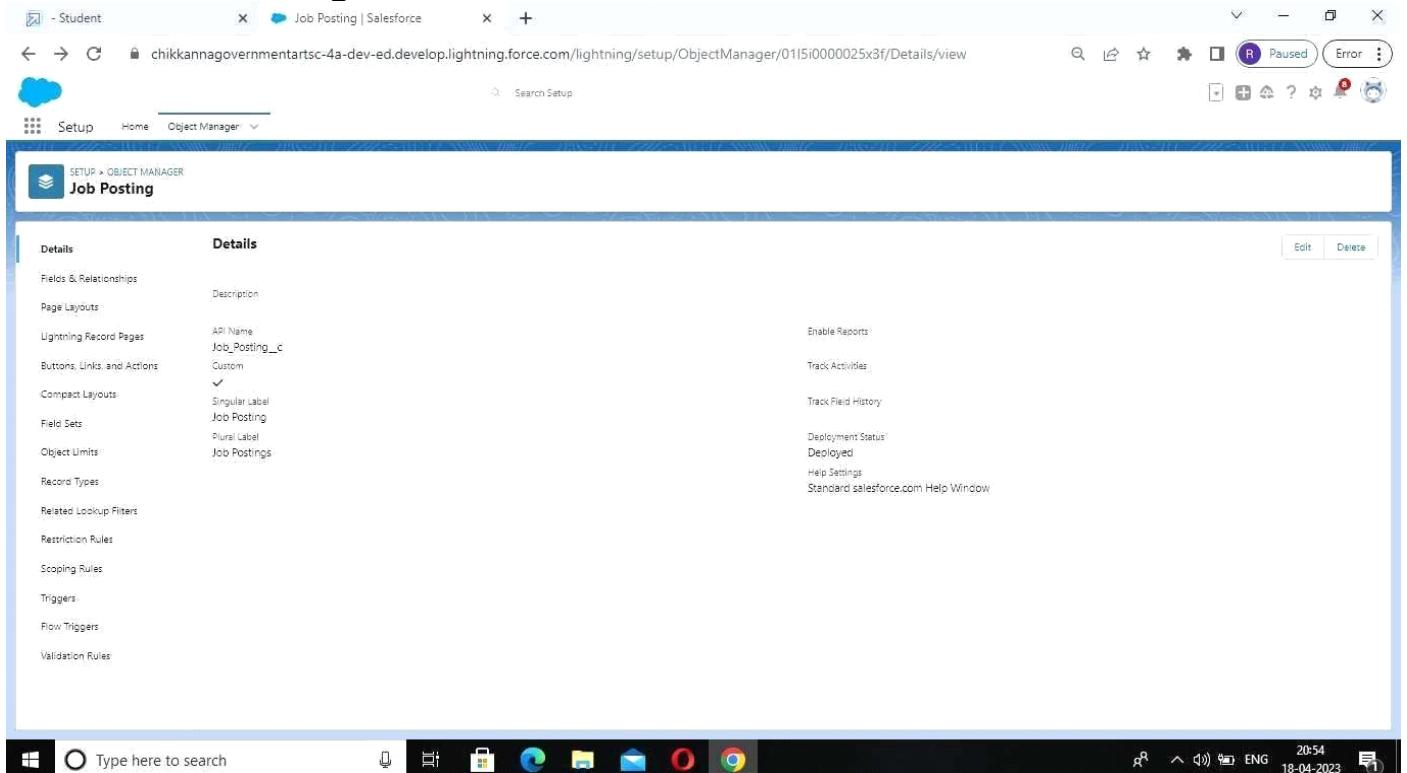
**Data Type**: Auto Number

- Enter the plural label as "Job postings".
- Enter the record name as "Job posting number".

- select the data type as "Auto Number".



- Enter the display format as "JOBPOST-{0000}"
- Enter the Starting number as 1



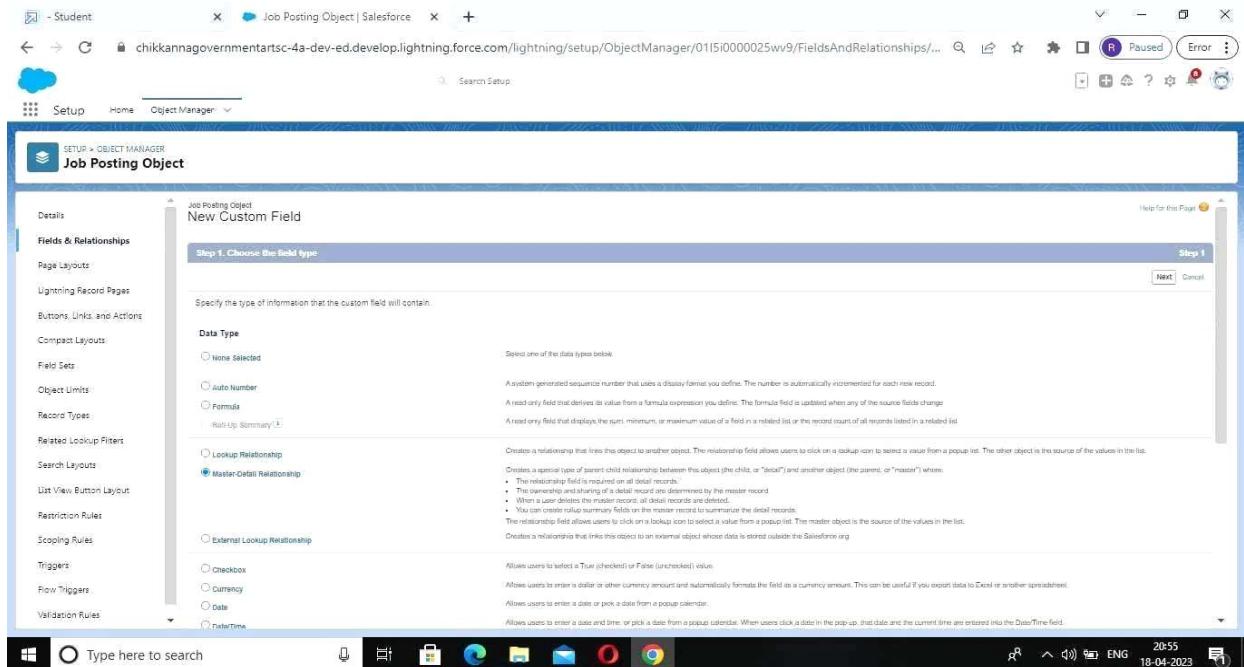
- Leave everything else as is, and click save .custom junction object is create successfully.

# Activity: 2

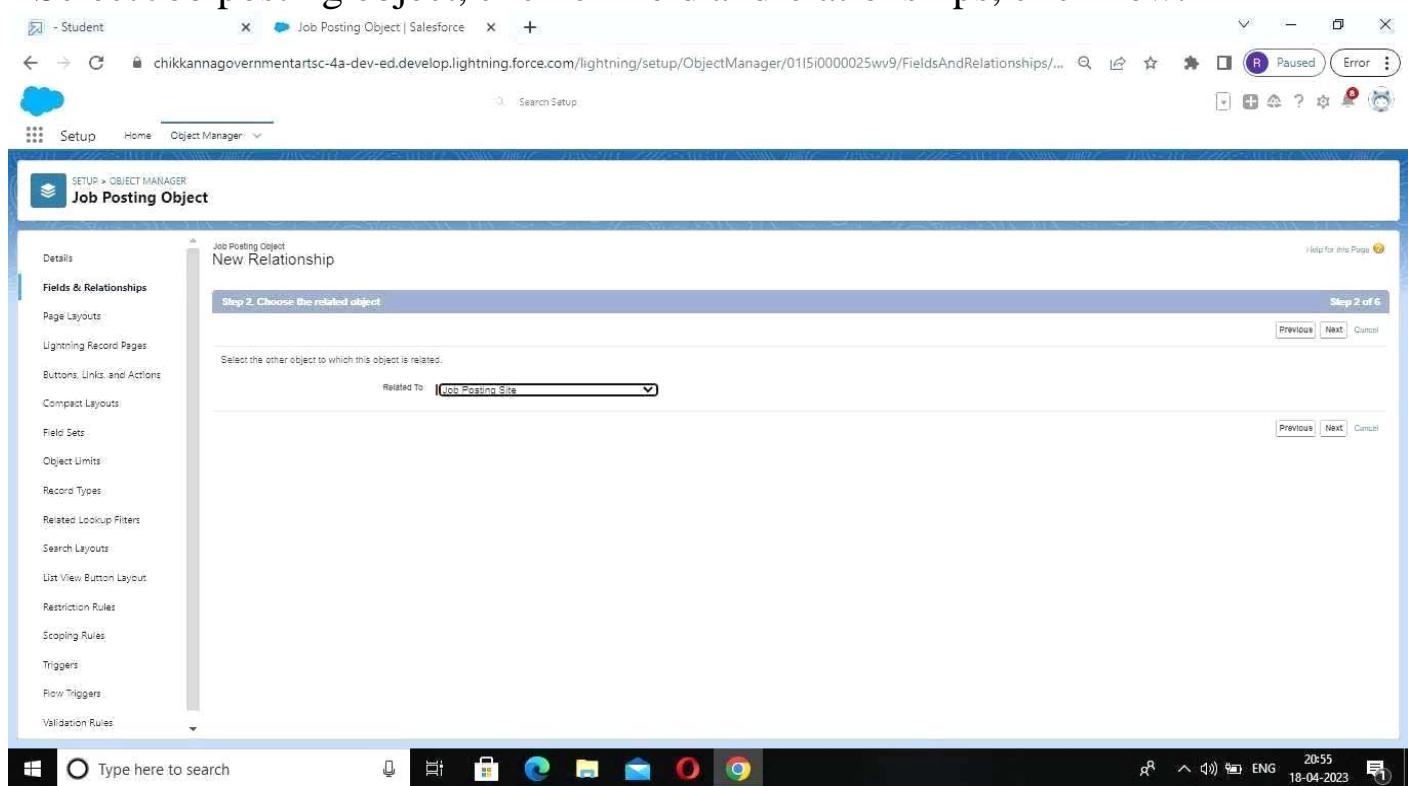
## Create a Relationships Object

### Creating a master-detail relationship between Jobpostingandjob posting site.

- From setup, click object manager.



- Select Job posting object, click on field andrelationships, click new.



- Select the data type as Master-detail relationship.

Job Posting Object | Salesforce

SETUP > OBJECT MANAGER

**Job Posting Object**

New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: Job Posting Site  
Field Name: Job\_Posting\_Site  
Description: Job Posting Site  
Help Text: Job Posting Site

Child Relationship Name: Job\_Posting\_Objects  
Sharing Setting:  Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.  
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

Allow reparenting:  Child records can be reparented to other parent records after they are created  
 Add this field to existing custom report types that contain this entry

Lookup Filter: Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

Step 3 of 6

Previous Next Cancel

- Click Next, relate to the Job posting site.

Job Posting Object | Salesforce

SETUP > OBJECT MANAGER

**Job Posting Object**

New Relationship

Step 6. Add custom related lists

Field Label: Job Posting Site  
Data Type: Master-Detail  
Field Name: Job\_Posting\_Site  
Description: Job Posting Site

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label: Job Posting Object

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.  
Add Related List: Page Layout Name:  Job Posting Site Layout  
 Append related list to users' existing personal customizations

Step 6 of 6

Previous Save & New Save Cancel

- Enter the label Job Posting site.

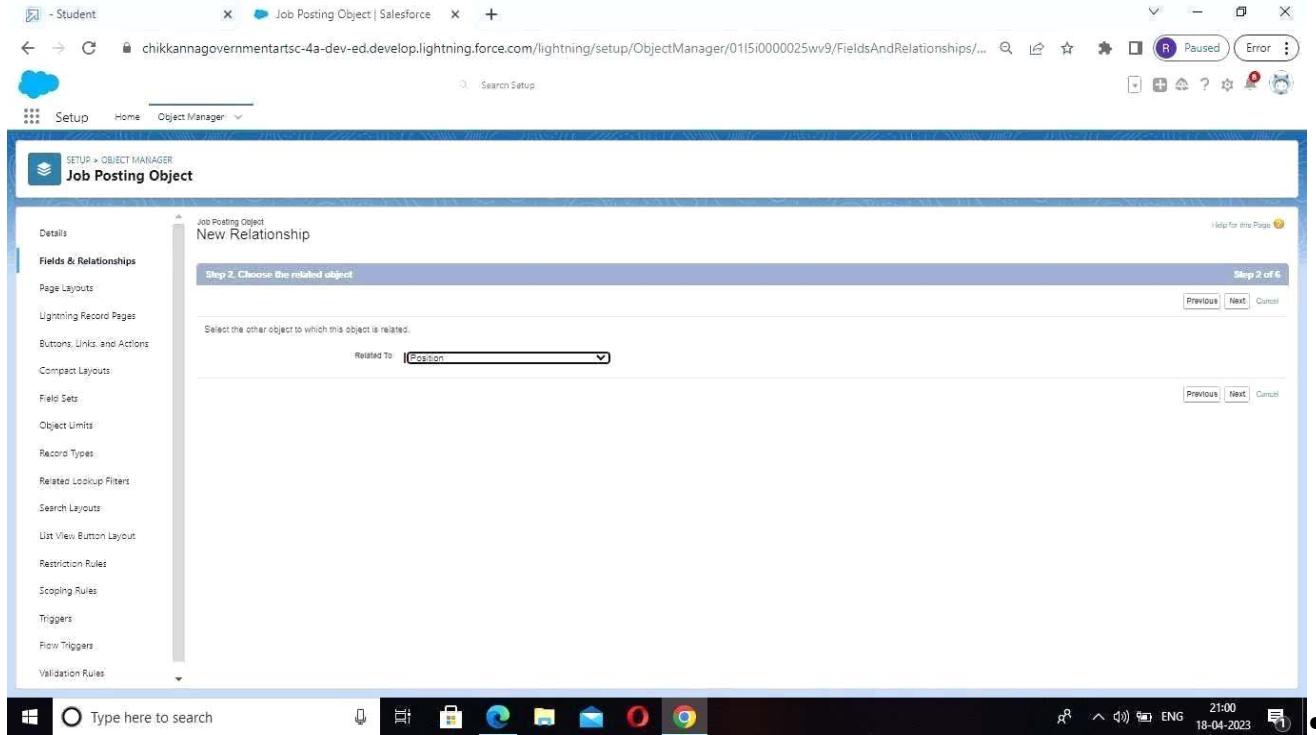
The screenshot shows the Salesforce Object Manager interface for the 'Job Posting Object'. The left sidebar lists various setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Fields & Relationships' and shows four items sorted by Field Label. The columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Created By (CreatedById, Lookup(User)), Name (Name, Text(80)), Job Posting Site (Job\_Posting\_Site\_\_c, Master-Detail(Job Posting Site)), and Last Modified By (LastModifiedBy, Lookup(User)).

- Click next, next, next and save.

## Creating a master-detail relationship between jobposting and position.

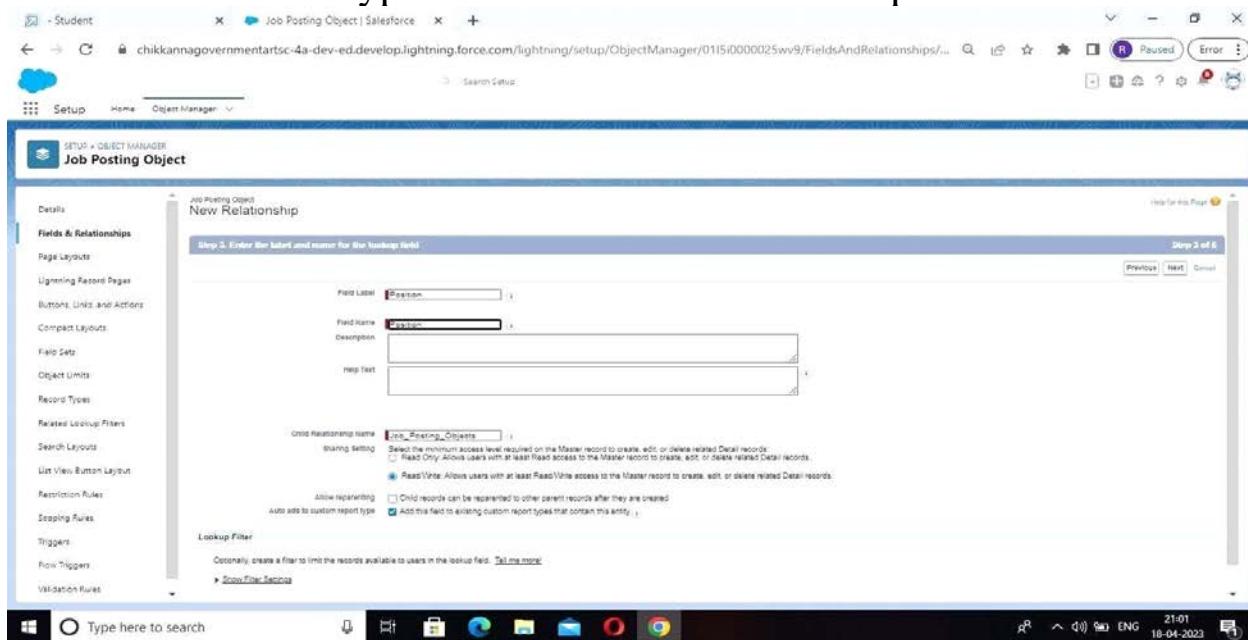
- From setup, click object manager.

The screenshot shows the 'New Custom Field' wizard for the 'Job Posting Object'. The first step, 'Step 1. Choose the field type', is active. It asks to specify the type of information the custom field will contain. The 'Data Type' section shows several options: None Selected, Auto Number, Formula, Roll-Up Summary, Lookup Relationship, Master-Detail Relationship (which is selected), and External Lookup Relationship. The 'Master-Detail Relationship' section explains it creates a relationship that links this object to another object. It requires a relationship field and a master record. The master object is the source of values in the list. The wizard also provides descriptions for other field types like Checkbox, Currency, Date, and Datetime.

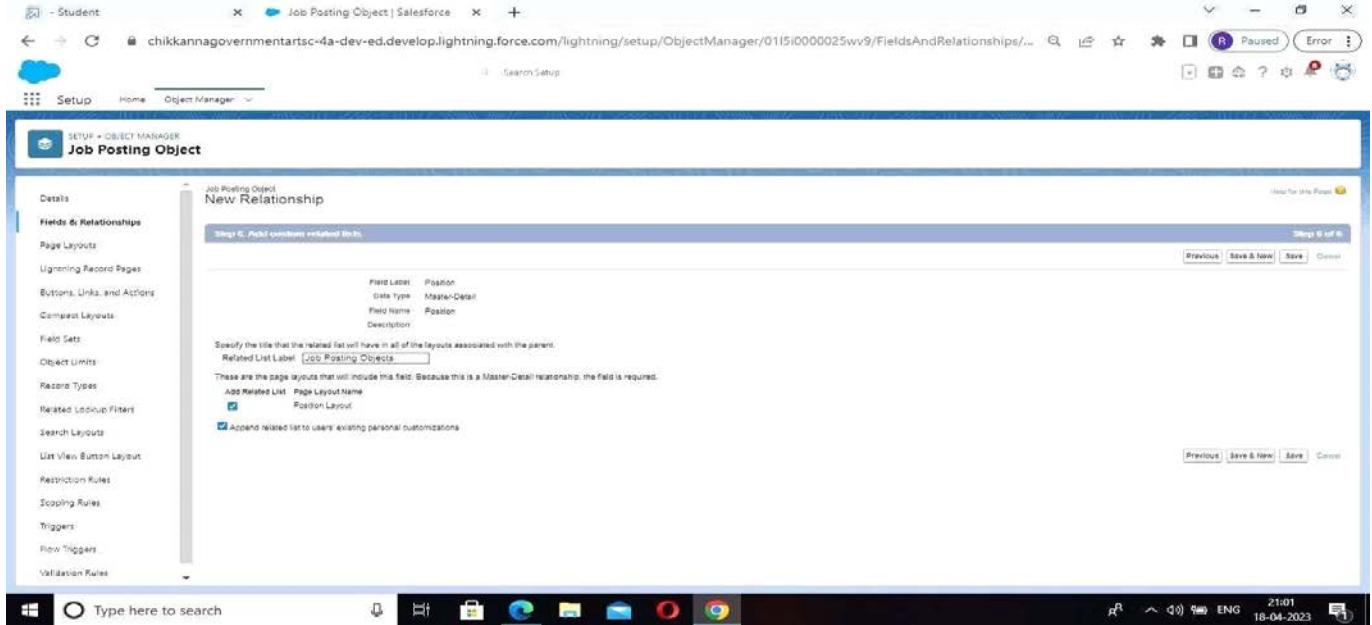


Select Job posting object, click on field and relationships,click new.

- Select the data type as Master-detail relationship.



- Click Next, relate to position.



- Enter the label Position.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Job Posting Object Number	Name	Text(50)		
Job Posting Site	Job_Posting_Site__c	Master-Detail(Job Posting Site)		
Last Modified By	LastModifiedById	Lookup(User)		
Position	Position__c	Master-Detail(Position)		

- Click next, next, next and save.

master-detail relationship between job posting and position is created successfully.

## Milestone 7: Page Layout

### what is Page Layout?

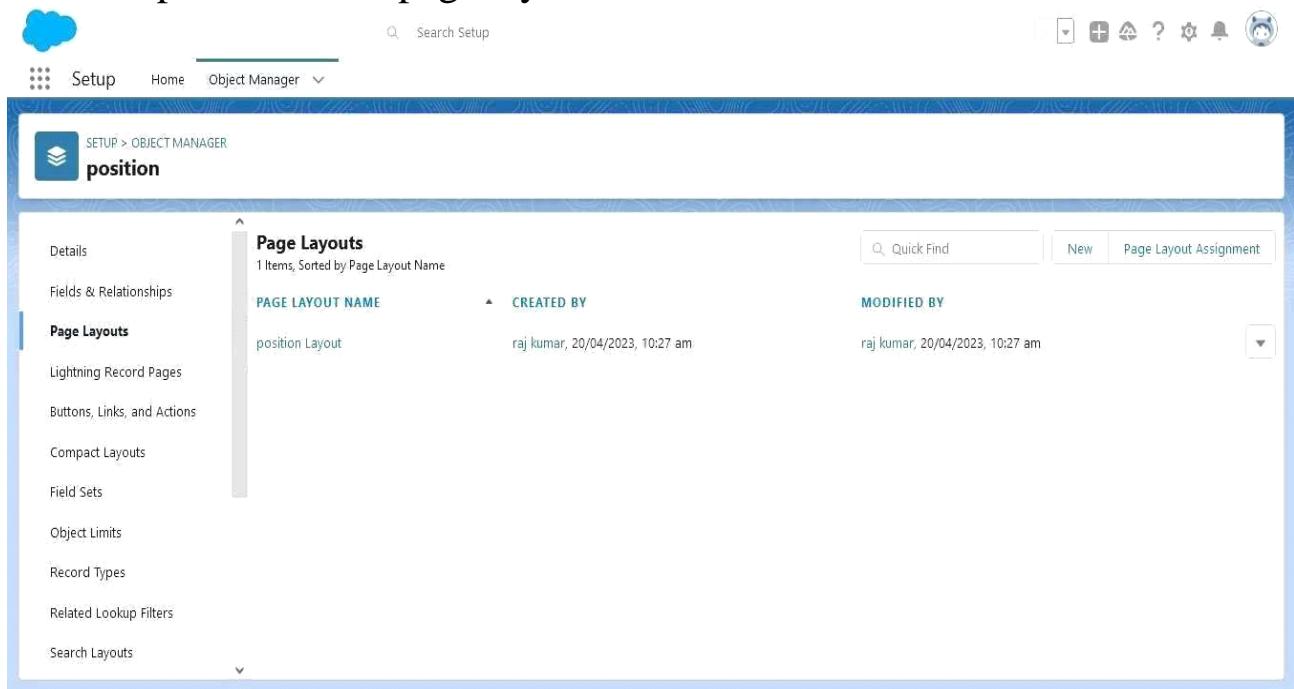
In Salesforce, a page layout is a visual design of a page that determines the organization and arrangement of fields, buttons, and other components on a page. Page layouts can

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

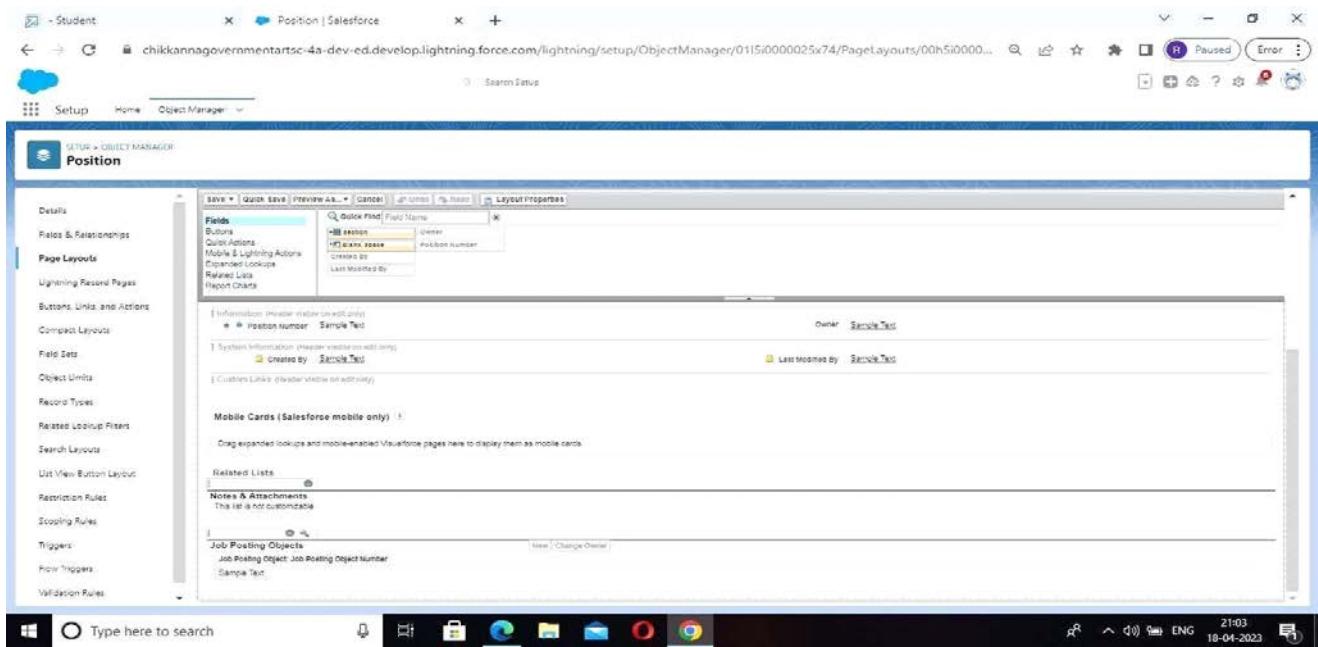
### Modifying the page layouts :

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



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes a cloud icon, 'Search Setup', and various global buttons. Below the bar, the 'Setup' tab is selected, followed by 'Object Manager'. The main content area is titled 'SETUP > OBJECT MANAGER' and shows the 'position' object. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts (which is selected and highlighted in blue), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main panel title is 'Page Layouts' with a subtitle '1 Items, Sorted by Page Layout Name'. It displays one item: 'position Layout' created by 'raj kumar, 20/04/2023, 10:27 am'. The interface includes standard Salesforce navigation and search tools like 'Quick Find', 'New', and 'Page Layout Assignment'.

- Click down array next to the position layout and select edit.
- Scroll down to the job posting related list, and click the wrench icon in the header to edit it.
  - From the available fields section, select Job posting site :Status Job posting site : Technical Site
- Click add.



From the selected fields section, select job posting : Job posting number and click remove.

- Click ok, then save.

page layouts is modified successfully.

## 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.

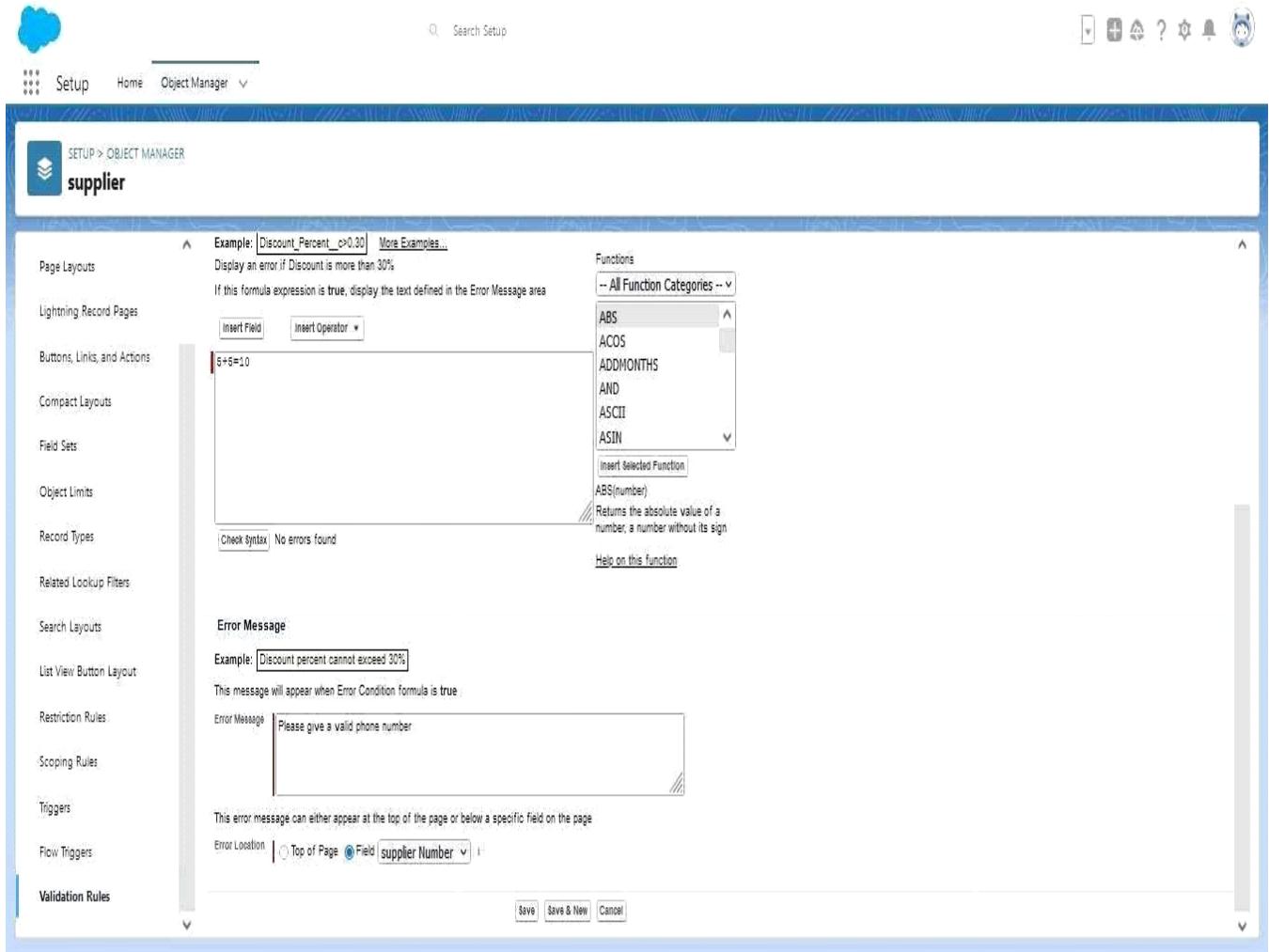
The screenshot shows the Salesforce Setup interface under Object Manager for the 'supplier' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Validation Rules' and displays a table with columns: RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. A message at the bottom states 'No items to display.'

Give details as:

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

The screenshot shows the 'Validation Rule Edit' screen for the 'supplier' object. It includes fields for Rule Name (Phone\_number\_validation\_rule), Active status (checked), and Description (Phone number should not be more than or less than 10 digits). The 'Error Condition Formula' section contains the formula '5+5=10'. A sidebar on the left lists other setup categories, and a help section on the right provides quick tips and links to operators and functions.

- Error Message: Please give a valid phone number
- Error location: select field
- Save



Validation Rule is created successfully.

## 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

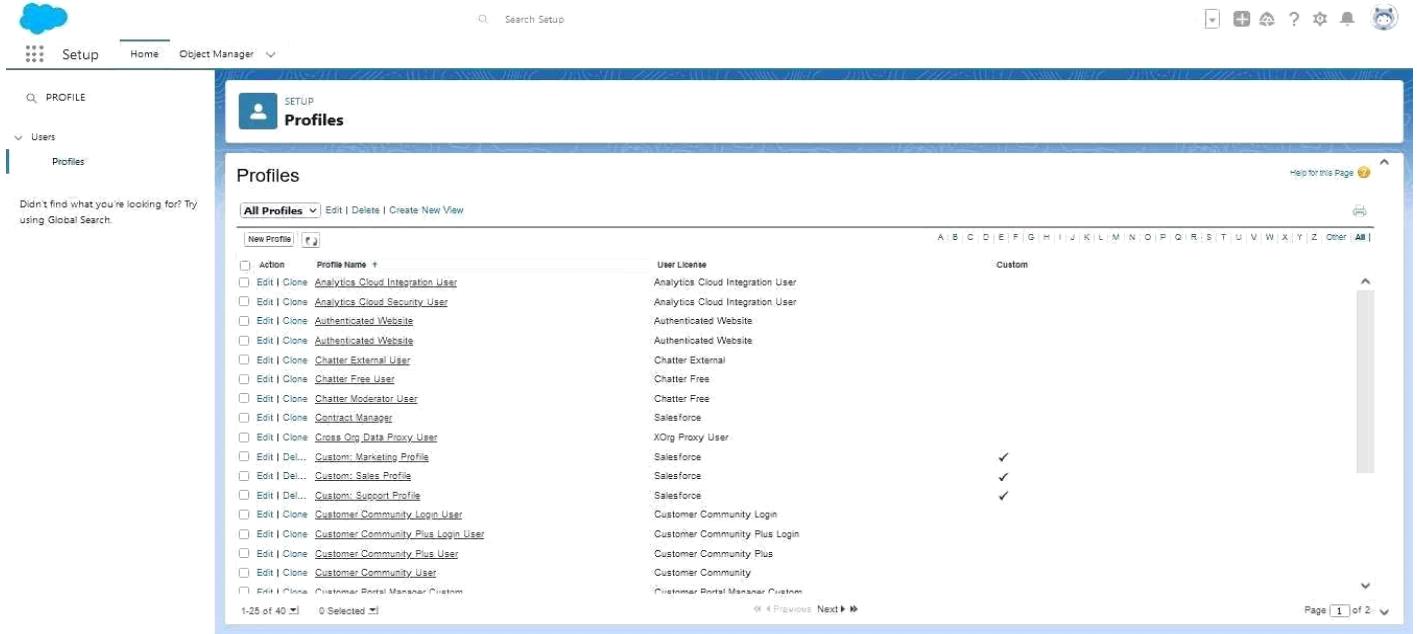
class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

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

## Activity

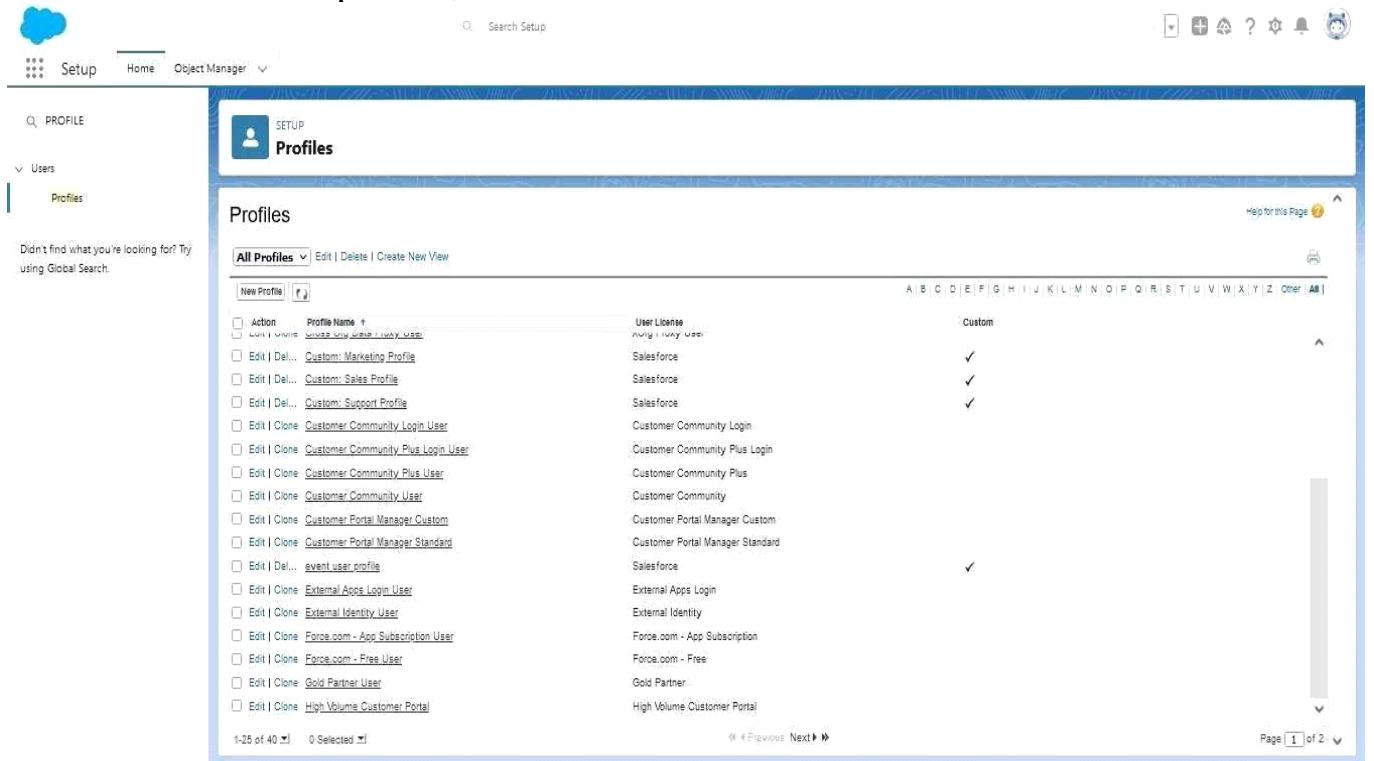
### Creation on profile:

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



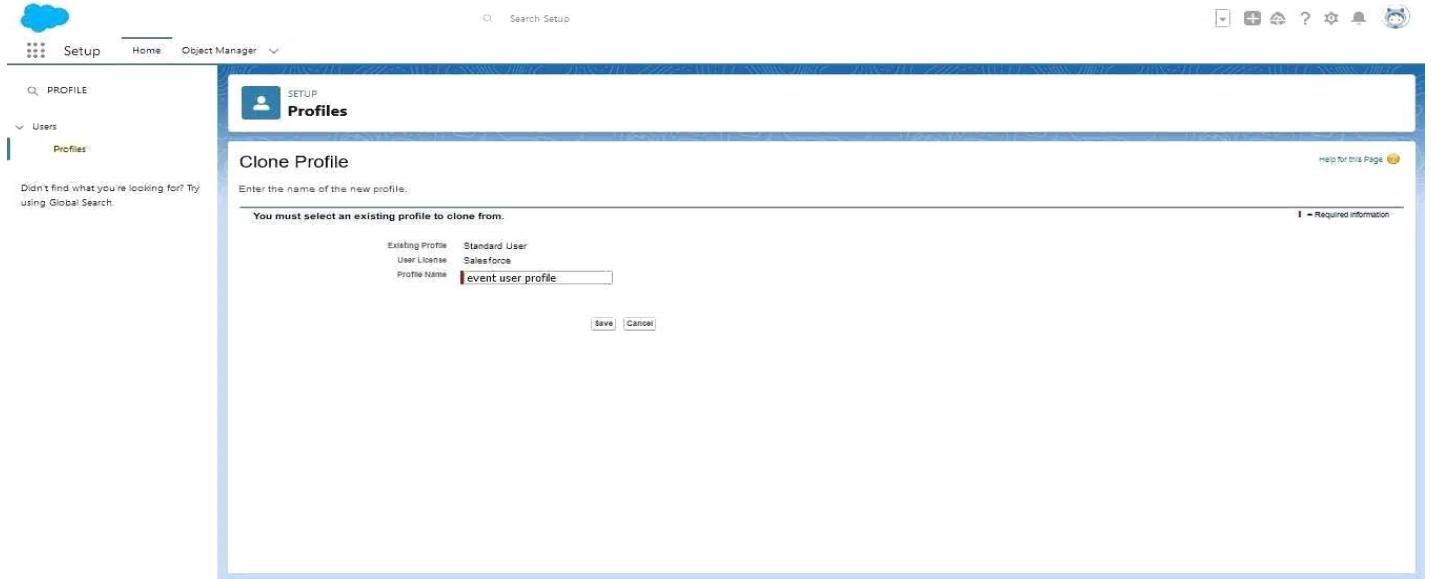
The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar shows 'PROFILE' under 'Users'. The main area has a title 'Profiles' with a search bar and a 'Help for this Page' link. Below the title is a table with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists 40 profiles, including standard and custom ones like 'Standard User', 'Salesforce', and 'Customer Portal Manager Custom'. A vertical scroll bar is visible on the right side of the table.

- From the list of profiles, find Standard User.



This screenshot is identical to the one above, showing the 'Profiles' page in the Salesforce Setup interface. It displays the same list of 40 profiles, including 'Standard User', 'Salesforce', and 'Customer Portal Manager Custom'. The interface includes a search bar, a help link, and a table with columns for Action, Profile Name, User License, and Custom.

- Click Clone.



- For Profile Name, enter Event user profile.
- Click Save
- While still on the Event profile page, then click Edit.

Object	Layout	Action
Global	Global Layout [View Assignment]	Object Milestone [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product [View Assignment]
Asset	Asset Layout [View Assignment]	Payment [View Assignment]

- 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 under the 'Profiles' section. On the left, there's a sidebar with 'PROFILE' and 'Users' selected. The main content area is titled 'SETUP Profiles'. It contains a 'Custom Object Permissions' grid where rows represent objects like 'job posting sites', 'positions', and 'suppliers'. Each row has tabs for 'Basic Access' (Read, Create, Edit, Delete, View All, Modify All) and 'Data Administration'. Below this is a 'Session Settings' section with 'Session Times Out After' set to '2 hours of inactivity' and 'Session Security Level Required at Login' set to '--None--'. Under 'Password Policies', various settings are configured: User passwords expire in 90 days, enforce 3 passwords remembered, minimum password length is 8, complexity must include alpha and numeric characters, password cannot contain the user's name, maximum invalid login attempts is 10, and lockout effective period is 15 minutes. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

profile is created successfully.

## Milestone10: User

### What is a user?

A user is anyone who logs in to Salesforce. User 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

- First Name :raj
- Last Name : kumar
- Alias :raj
- Email : [chocoraj001@gmail.com](mailto:chocoraj001@gmail.com)
- Username : [chocoraj001@gmail.com](mailto:chocoraj001@gmail.com)
- Nickname : arjun
- Role : leave it as default
- User License : Salesforce
- Profile : Event User Profile

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. Under 'ADMINISTRATION', there is a 'Users' section. The main content area displays a 'User Detail' form for a user named 'raj kumar'. The 'Role' section shows 'Salesforce' selected. Other roles listed include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Mobile Push Registrations. The 'User Detail' form contains fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, and various status indicators like Active, Marketing User, Offline User, etc.

This screenshot continues from the previous one, showing the user profile for 'raj kumar'. It displays basic profile information such as Email Encoding (Unicode (UTF-8)), Employee Number (0), Used Data Space (0 B), and Used File Space (0 B). It also shows the Last Login (16/04/2023, 3:07 pm), Failed Login Attempts (0), and Individual Modified By (raj kumar) on 19/04/2023, 11:22 am. Below this, two sections are shown: 'Permission Set Assignments' and 'Permission Set Assignments: Activation Required'. The 'Permission Set Assignments' section lists an action (Del) and a permission set label ('supplier permits and save'). The 'Permission Set Assignments: Activation Required' section shows 'No records to display'.

The user is created successfully.

## Milestone 11 : Permission set

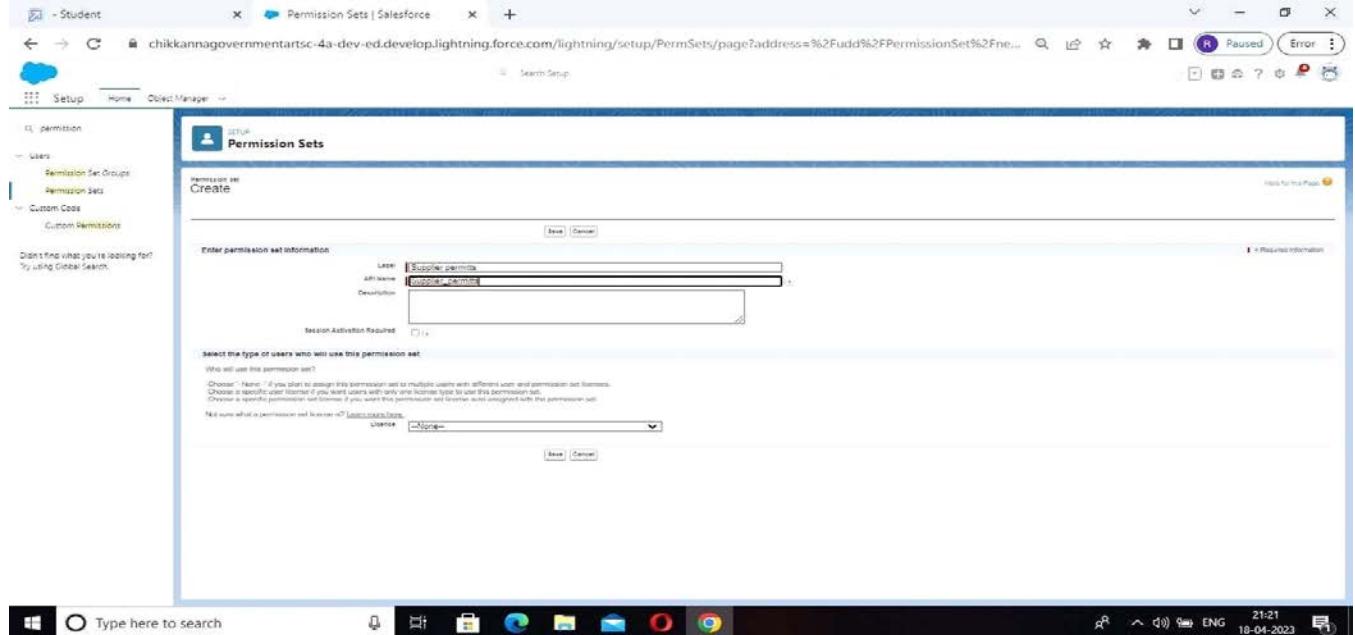
### What is the Permission set?

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 the 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.

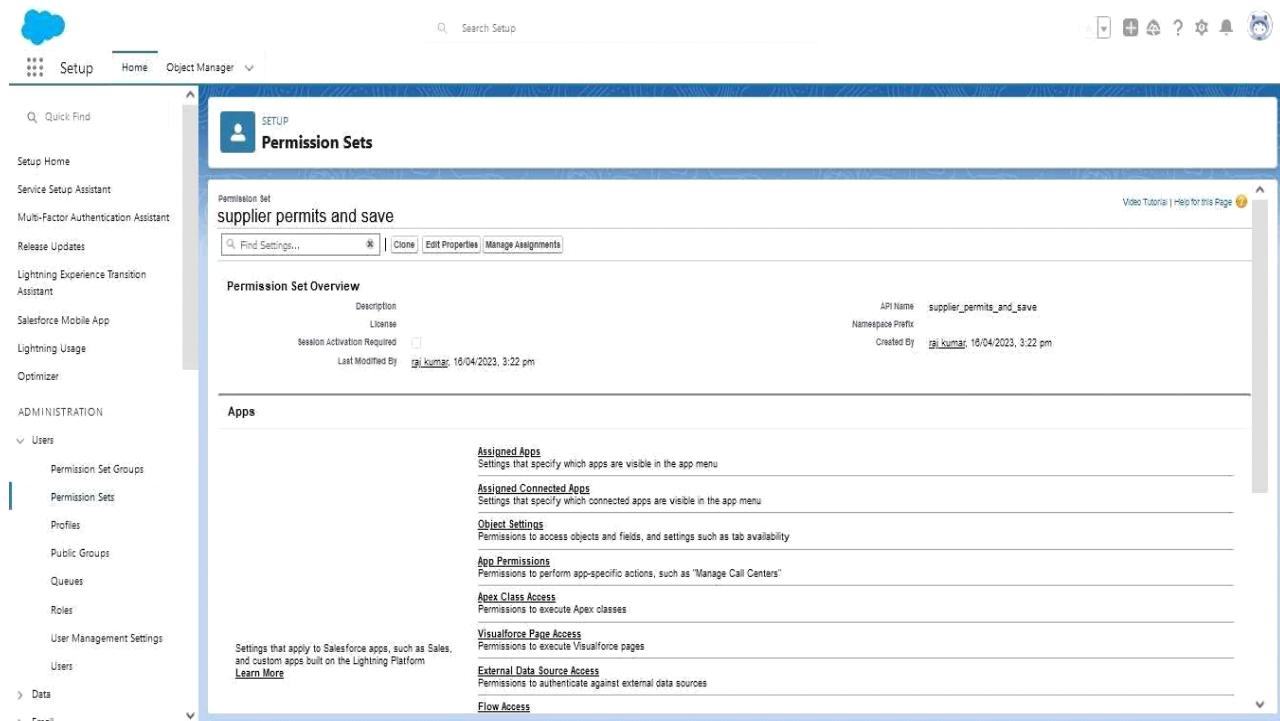
# Activity-1

## Creating a Permission Set:

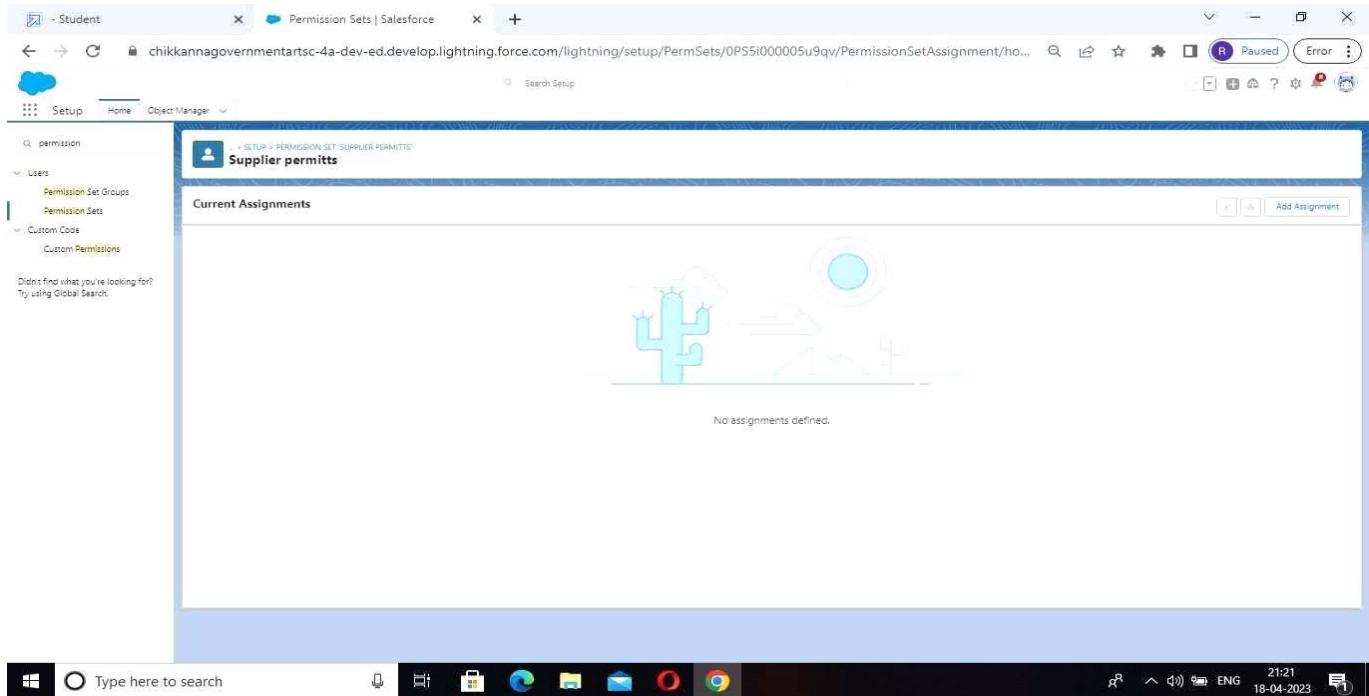
- From setup search “permission sets” in quick find and select permission set then click on New.



- Enter label as: Supplier Permits and Save.
- After saving the permission click on the Manage assignment



- Now click on the Add Assignment



- Now select the users and click on save permission set is created successfully.

## Activity-2

Create a Permission set for Review object the permission set for review object is created.

## Milestone12: 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:

- From the Reports tab, click New Report.

The screenshot shows the 'Recent' section of the Salesforce Reports interface. A single report titled 'job posting report' is listed. The report was created by 'raj kumar' on '19/4/2023, 10:03 am'. It is located in the 'Private Reports' folder. The sidebar on the left provides navigation links for 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', and 'Favorites'.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	job posting report		Private Reports	raj kumar	19/4/2023, 10:03 am	

The screenshot shows the 'All Reports' section of the Salesforce Reports interface. Two reports are listed: 'job posting report' and 'Sample Flow Report: Screen Flows'. The 'job posting report' was created by 'raj kumar' on '19/4/2023, 10:03 am'. The 'Sample Flow Report: Screen Flows' was created by 'Automated Process' on '15/4/2023, 8:12 am'. Both reports are located in the 'Public Reports' folder. The sidebar on the left provides navigation links for 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', and 'Favorites'.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	job posting report		Private Reports	raj kumar	19/4/2023, 10:03 am	
Created by Me	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	15/4/2023, 8:12 am	

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

The screenshot shows the Salesforce Report Builder interface. At the top, there's a search bar and a toolbar with icons for star, plus, question mark, gear, and a user profile. Below the toolbar, the navigation bar includes Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, and job posting sites. A 'REPORT' dropdown is open, showing 'job posting report' and 'Accounts'. On the left, a sidebar titled 'Fields' contains sections for 'Groups' (with 'GROUP ROWS' and 'Add group...'), 'Columns' (with 'Add column...'), and several filter fields: Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date. The main area displays a table with 12 rows of account data, each row starting with a number (1-12) and followed by columns for Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date. A message at the top of the table says 'Previewing a limited number of records. Run the report to see everything.' There's also a toggle switch for 'Update Preview Automatically'.

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

The screenshot shows the Salesforce report preview page. The title is 'Report: Accounts job posting report'. It includes a toolbar with 'Enable Field Editing', search, chart, and edit buttons. Below the toolbar, it says 'Total Records' and '12'. The main content is a table identical to the one in the Report Builder, displaying 12 rows of account data with columns for Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date.

**The report is created successfully.**

## TRAILHEAD PROFILE PUBLIC URL:

**TEAM LEADER : <https://trailblazer.me/id/rkumar5103>**  
**TEAM MEMBER 1 : <https://trailblazer.me/id/pugazh1816>**  
**TEAM MEMBER 2 : <https://trailblazer.me/id/rkumar5102>**  
**TEAM MEMBER 3 : <https://trailblazer.me/id/ranga12>**

## **ADVANTAGES OF THIS PROJECT:**

- **Reduce time to hire.**
- **Shorten onboarding times.**
- **Cost less.**
- **Strengthen employee engagement.**
- **Create resentment among employees and managers.**
- **Leave a gap in your existing workforce.**
- **Limit your pool of applicants.**
- **Result in inflexible culture.**

## **DISADVANTAGE OF THIS PROJECT**

- **There is no any specific disadvantage till now noticed.**
- **The features may be added in the future for collecting more information handling.**

## **APPLICATION:**

- This sales force will have a real time application in RETAIL MANAGEMENT APPLICATION USING SALESFORCE
- This will facilitate the young amateur students like us to improve this kind of sales force projects with more features in the future.
- For the current HR Assistant with Mega Industries they can undertake activities such as conducting background checks calling candidates and checking references.

## **CONCLUSION:**

We have successfully created the sales force project RETAIL MANEGEMENT APPLICATION USING SALESFORCE. This will have a real time application in retail management application using salesforce. This recruiting app is a software application will help companies for managing their recruiting and hiring processes. It typically includes features such as job posting, applicant tracking, resume management, and candidate communication.

## **FUTURE SCOPE:**

- The completed sales force project has real time application in RETAIL MANEGEMENT APPLICATION USING SALESFORCE.
- We are going to improve this project with more features and to upgrade this for a commercial application project with unlimited user information.

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