

Recruiting Assistance For The HR Managers

[In this project, we use custom objects, relationships, page layouts to give the HR team easy access to data they need on an existing recruitment app. To make the existing app more efficient for the HR team we create custom objects and relationships to store and access the data more efficiently. We install an unmanaged package in the org to get metadata that acts as existing data in the recruitment app]

Team ID :
NM2023TMID03497

Team Leader:
Thanigaivel .V

Members:
Tamilkumaran .S
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Milestone 1: Creation of developer account

Activity-1

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

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Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

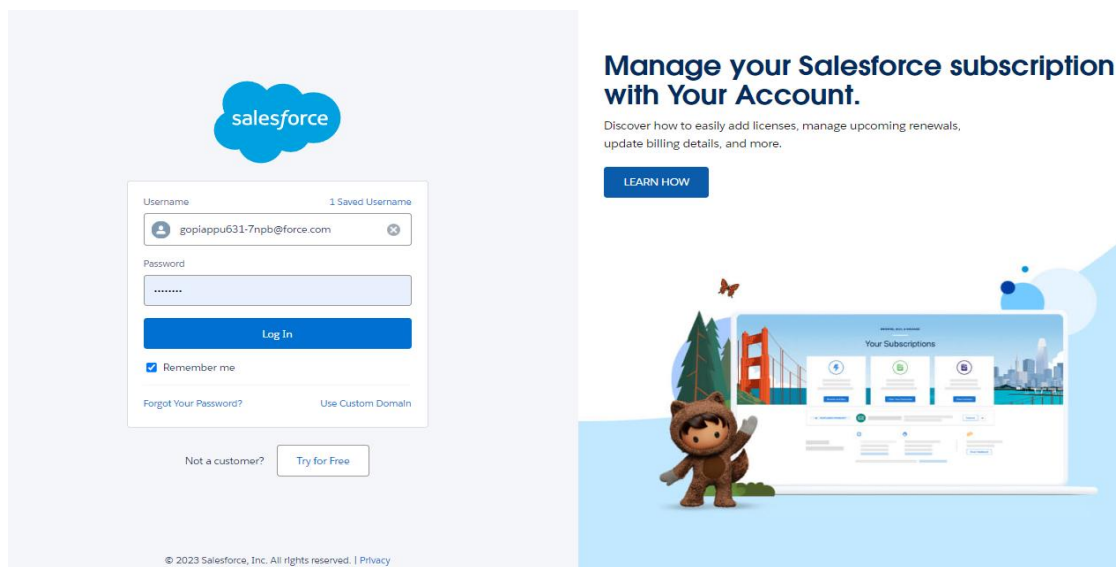
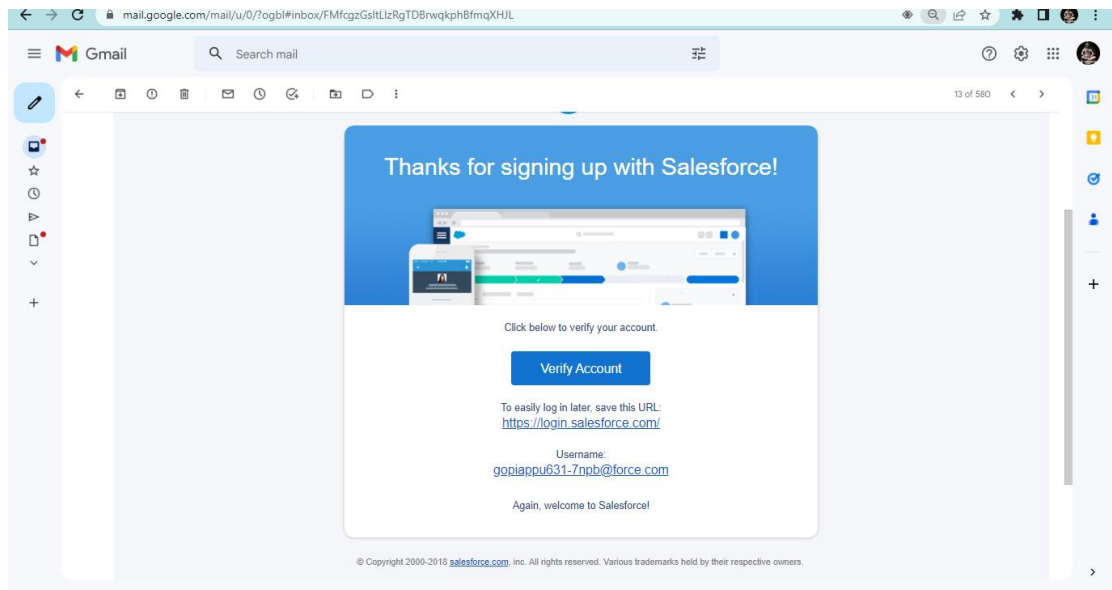
Last Name*
Your last name

Email*
Your email address

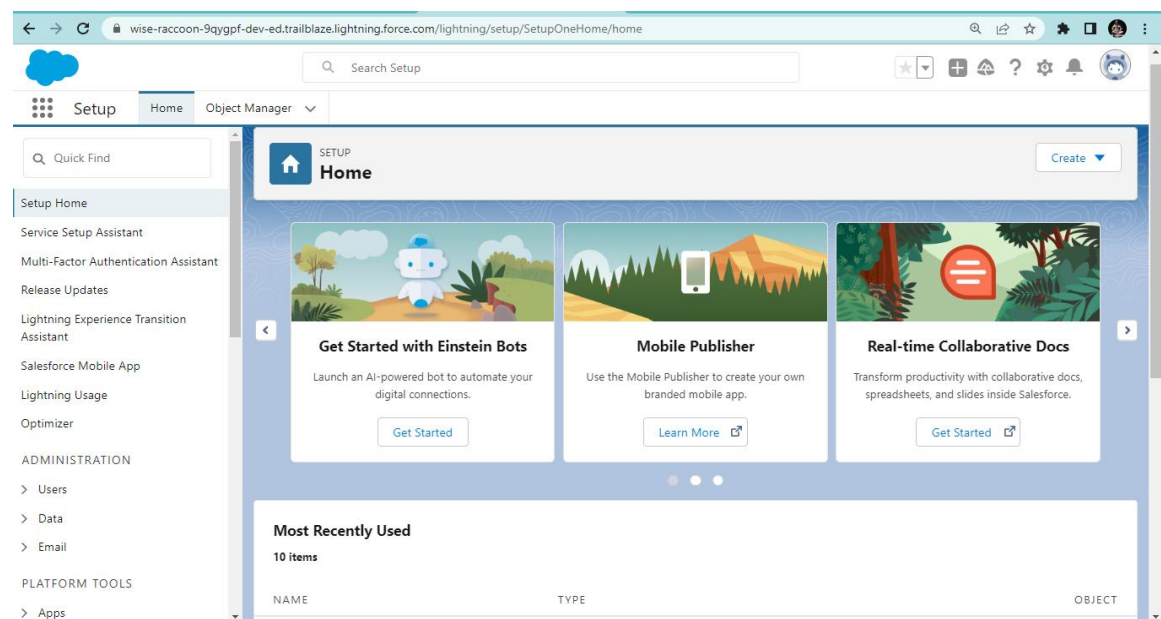
Role*
Your job role

Company*
Company Name

1. Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.
2. . Click sign me up, After a few min you will receive a mail from salesforce org and by using the email verification account link you can create your new password.
3. Click save.
4. Search login.salesforce.com
5. By using username and password you can log into the salesforce org.



The setup page will appear as below.



Create a developer org and login with your login credentials.

Milestone 2 : Package installation

Package installation for Recruiting App

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

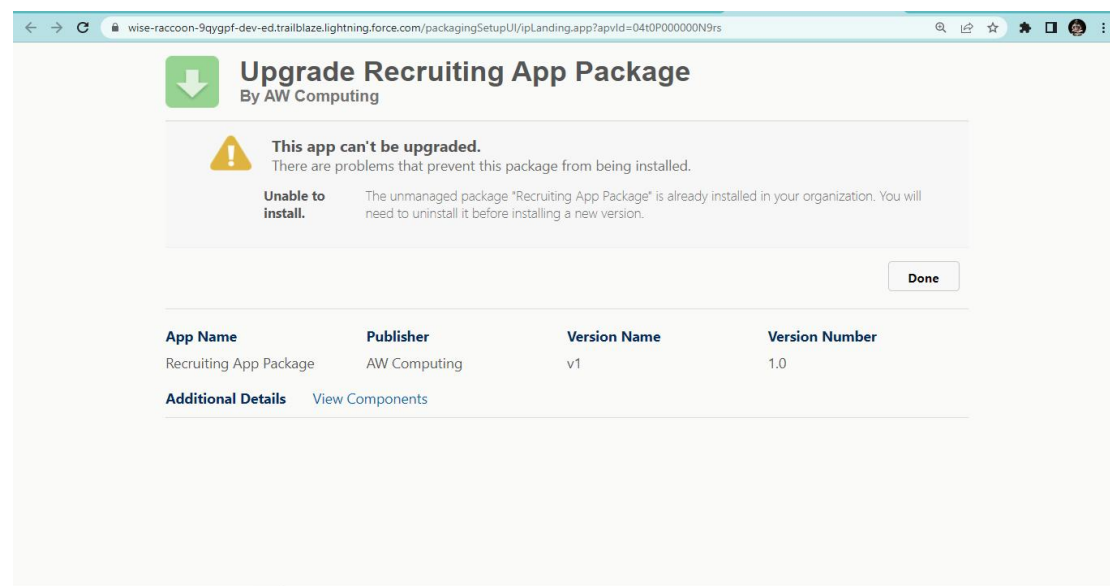
click to launch the App Launcher, then click Playground Starter and follow the steps

1. Click the install a package tab.

2. Paste **04t0P000000N9rs** into the field.

3. Click install.

4. 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

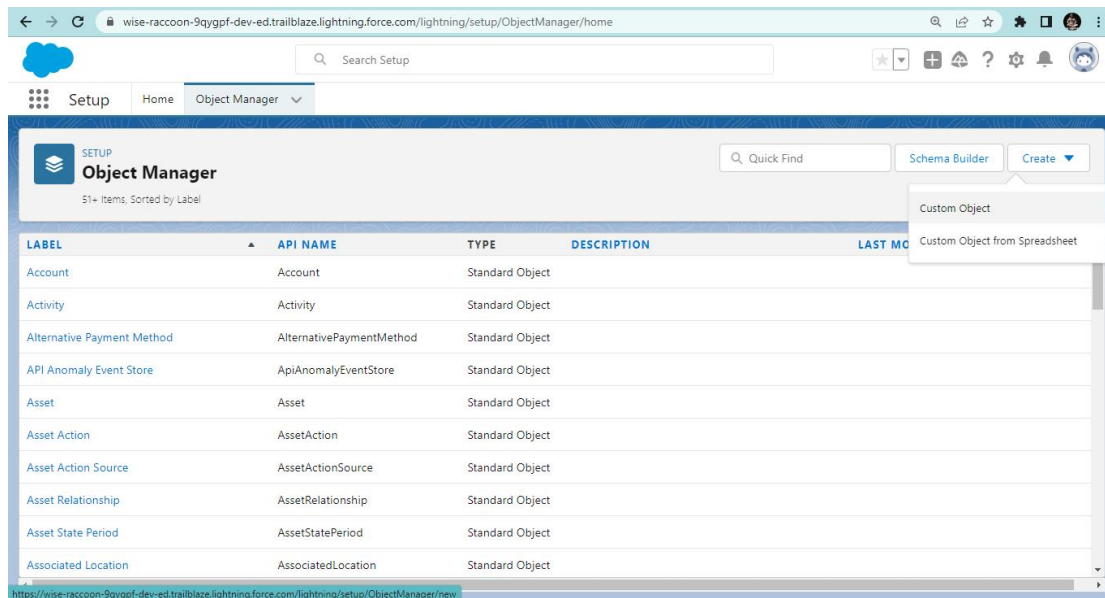
by salesforce.com such as users, contracts, reports, dashboards, etc.

● **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

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



3. Fill in the label as "Job Posting Site".
4. Fill in the plural label as "Job Posting Sites".
5. Record name : "Site Name"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.

The screenshot shows the Salesforce Setup interface for creating a new custom object. The browser address bar displays the URL: `wise-raccoon-9qygpf-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/new`. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The main content area is titled "New Custom Object" and contains the "Custom Object Definition Edit" form. The form includes sections for "Custom Object Information" and "Context-Sensitive Help Setting".

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

Custom Object Information ⓘ = Required Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

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

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

Activity-2

Create a custom object for reviews

To create a custom object, follow these steps :

- 1. From setup click on object manager.**
- 2. Click create, select custom object.**

3. Fill in the label as "Review".
4. Fill in the plural label as "Reviews".
5. Record name : "Review Number"
6. Select the data type as "Auto Number".
7. Under display format enter "REV-{0000}".
8. Enter the starting number as 1.
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

Milestone 4 : Tabs

What is Tab?

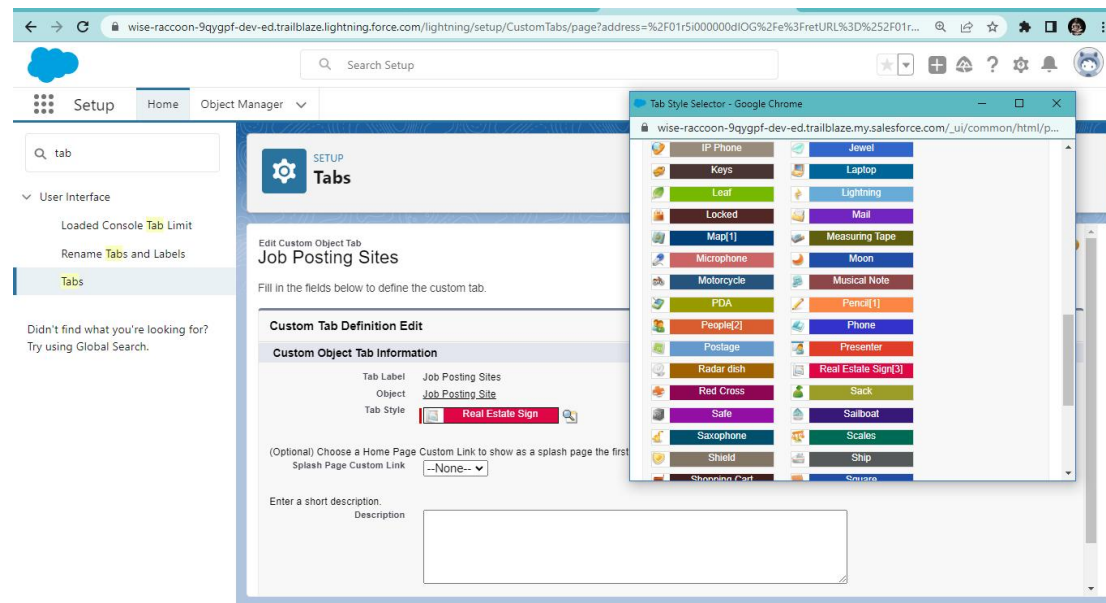
In Salesforce, a tab is a user interface element that allows users to navigate to different sections of the platform, such as Accounts, Contacts, Leads, and Opportunities. Tabs can also be used to access custom objects and custom pages. They are typically located at the top of the screen and can be customized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

Activity :

How to create a tab

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

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



2. Click Next.

3. Leave the profile as is and click Next.

4. In the Add to Custom Apps section:

5. Deselect Include Tab.

6. Select Append tab to users' existing personal customizations.

7. Click Save.

Milestone 5 : Fields

What are fields?

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

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

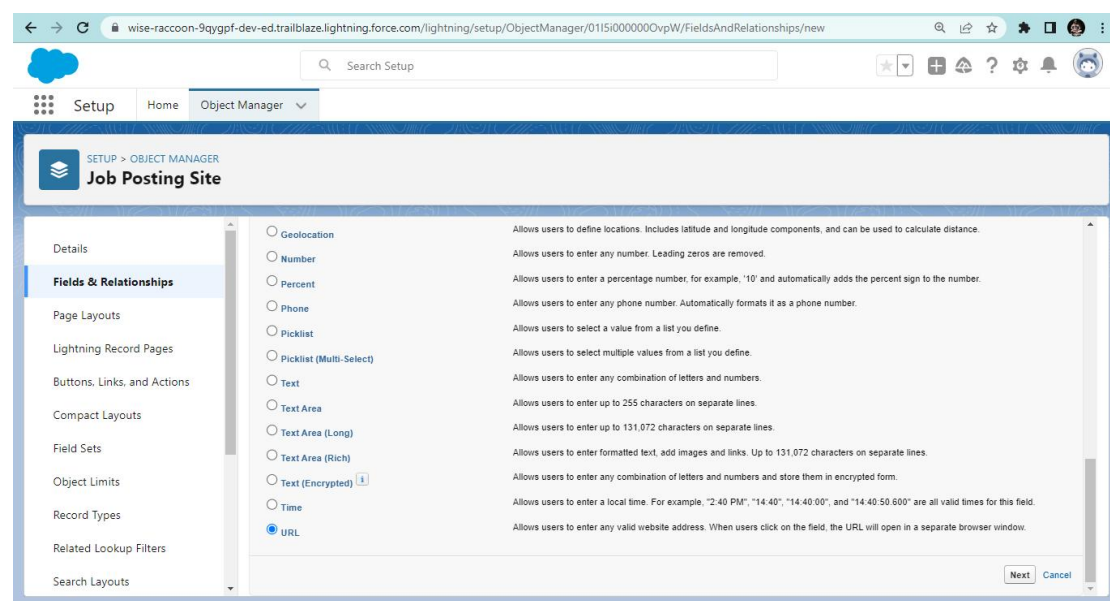
● **Custom fields:** The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

Activity-1

Create New Field for Job Posting site

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

1. **Click on new.**
2. **Select the data type as URL.**



3. Click Next.

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

The screenshot shows the Salesforce Setup interface for creating a new custom field. The breadcrumb trail is 'Setup > OBJECT MANAGER > Job Posting Site'. The left sidebar shows the 'Fields & Relationships' section selected. The main content area is titled 'New Custom Field' and shows 'Step 2. Enter the details' of a 4-step process. The 'Field Label' is 'Job Posting Sites URL', the 'Field Name' is 'Job_Posting_Sites_URL', and the 'Description' is empty. The 'Help Text' field is also empty. The 'Required' checkbox is unchecked, and the 'Auto add to custom report type' checkbox is checked.

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

Create a Fields for Job Posting site

- 1. Status**
- 2. Technical site**
- 3. Description**

Note: Follow the steps Create the left over fields

- 1. Status**
- 2. Technical site**
- 3. Description**

Milestone 6 : Junction Object

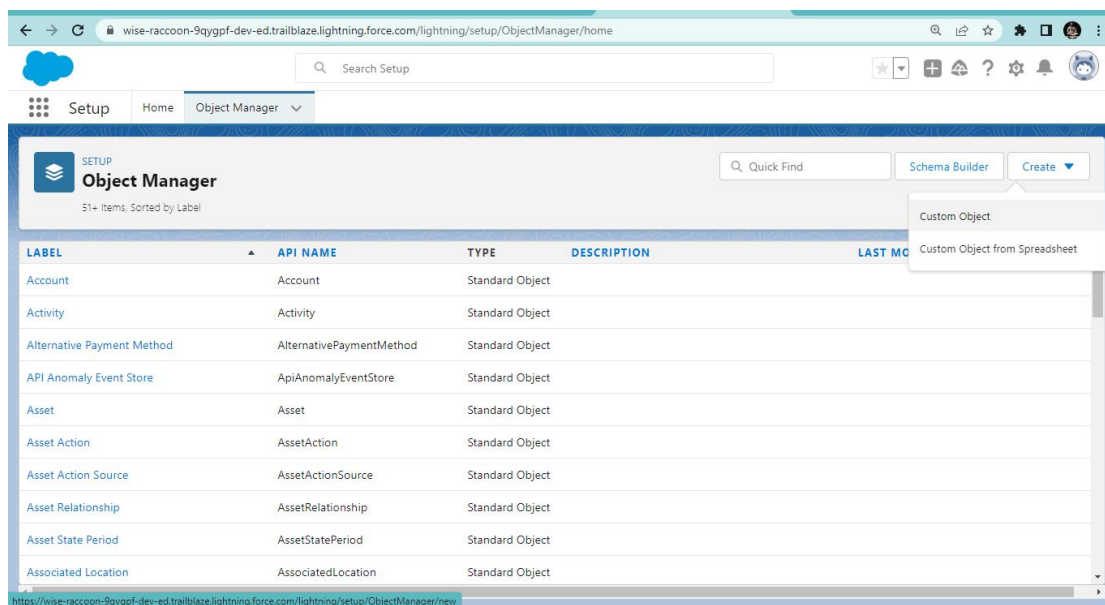
What is a Junction Object?

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

Activity

Creating a custom junction object :

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



The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: <https://wise-raccoon-9qygp-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/home>. The page header includes the Salesforce logo, a search bar, and navigation tabs for Setup, Home, and Object Manager. The Object Manager section shows a list of standard objects with columns for LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. A 'Create' button is visible in the top right corner, and a dropdown menu is open, showing options for 'Custom Object' and 'Custom Object from Spreadsheet'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		
Asset Action Source	AssetActionSource	Standard Object		
Asset Relationship	AssetRelationship	Standard Object		
Asset State Period	AssetStatePeriod	Standard Object		
Associated Location	AssociatedLocation	Standard Object		

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

The screenshot shows the Salesforce 'New Custom Object' setup page. The browser address bar displays the URL: `wise-raccoon-9qygp-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/new`. The page title is 'New Custom Object'. The main form is titled 'Custom Object Definition Edit' and includes buttons for 'Save', 'Save & New', and 'Cancel'. The 'Custom Object Information' section contains the following fields:

- Label:** Job posting (Example: Account)
- Plural Label:** Job postings (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** Job_posting (Example: Account)
- Description:** (Empty text area)

At the bottom, the 'Context-Sensitive Help Setting' section has two radio buttons: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'.

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

Activity: 2

Create a Relationships Object

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

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

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

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

Milestone 7: Page Layout

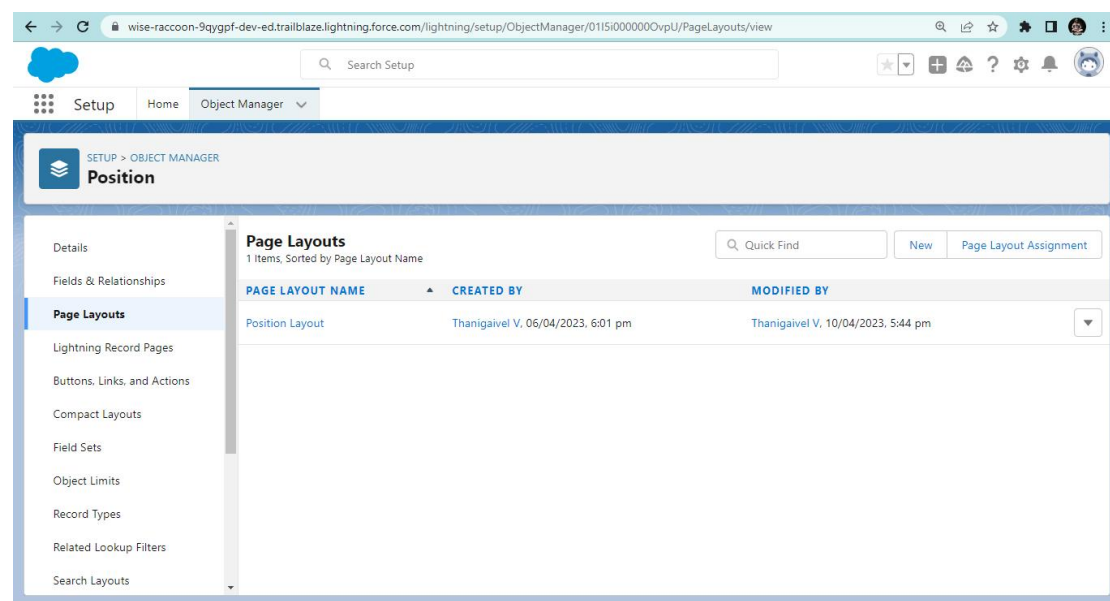
What is Page Layout?

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

Activity-1

Modifying the page layouts :

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



3. Click down arrow next to the position layout and select edit.
4. Scroll down to the job posting related list, and click the wrench icon in the header to edit it.

5. From the available fields section,

6. select

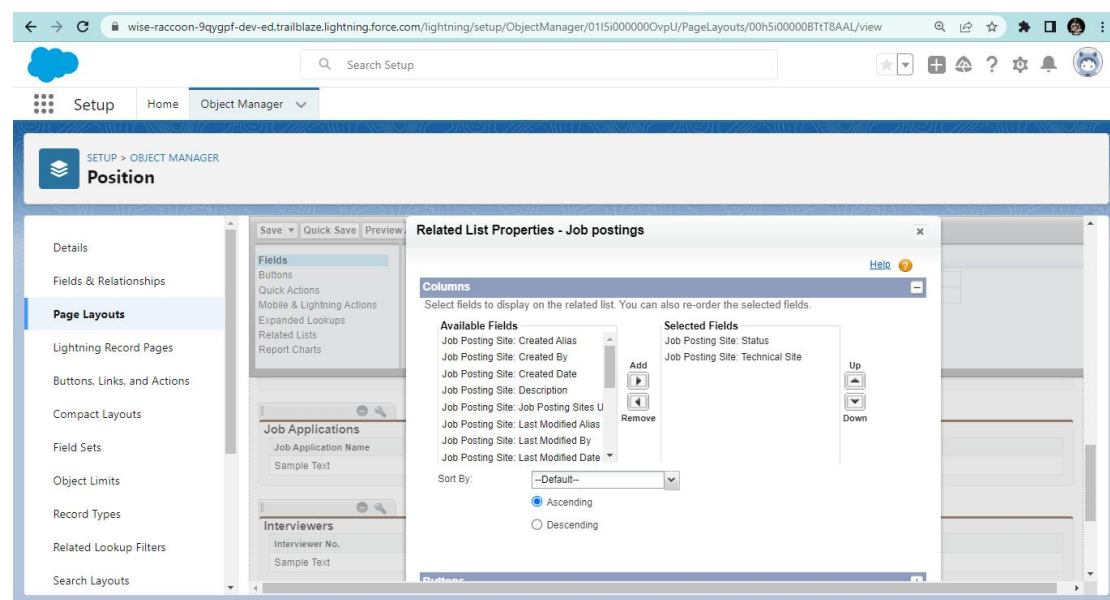
7. Job posting site : Status

8. Job posting site : Technical Site

9. Click add.

10. From the selected fields section,

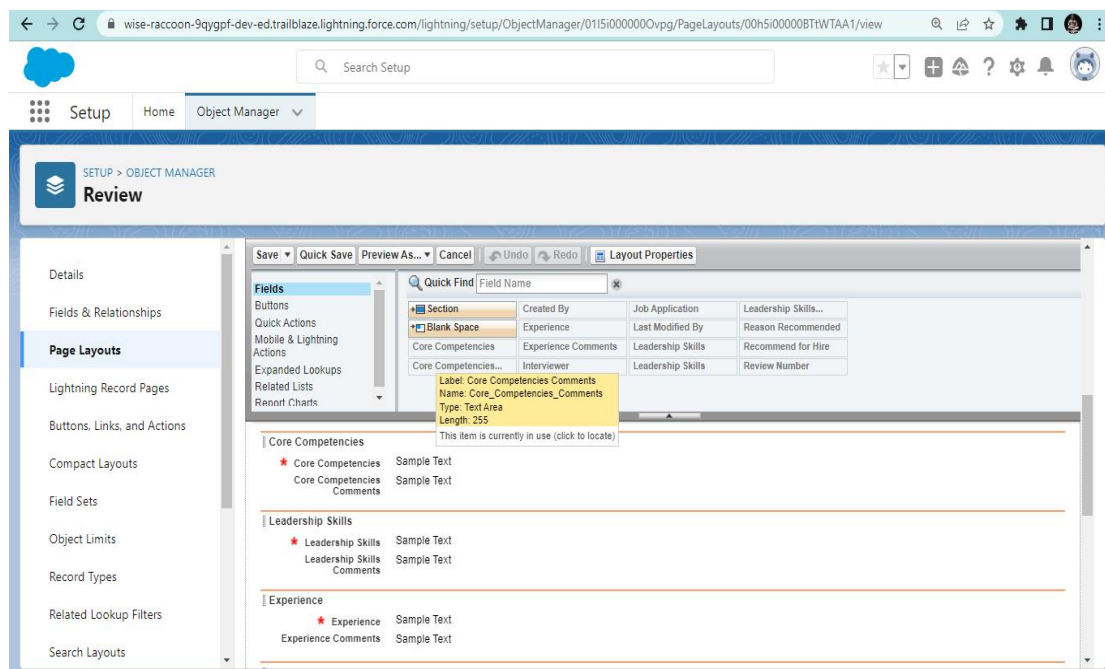
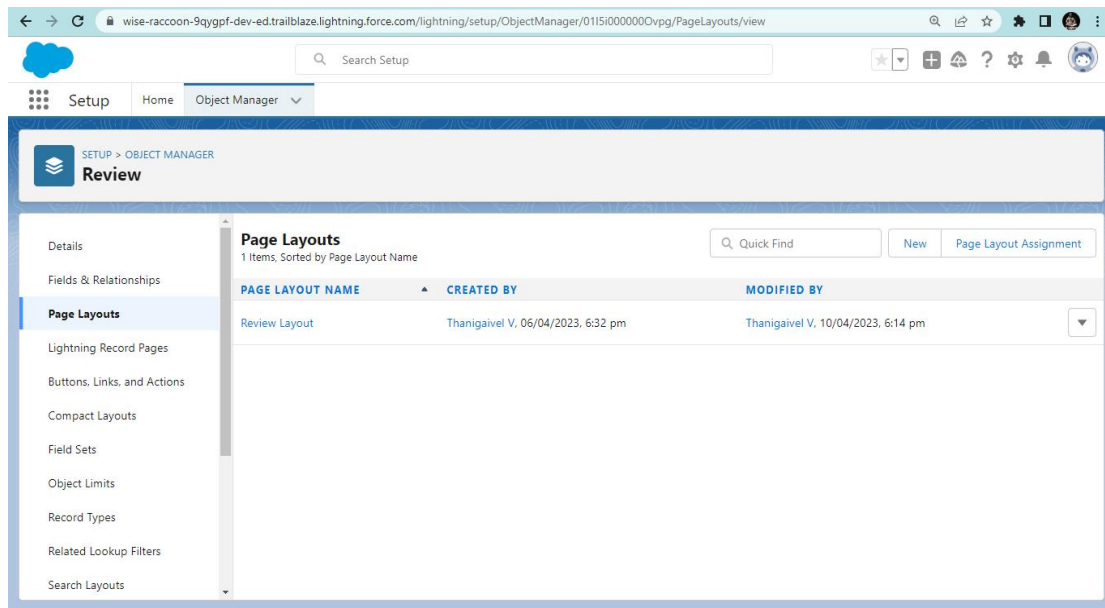
11. select job posting : Job posting number and click remove



12. Click ok, then save.

Activity-2

Create a Page layout for Review Object



Milestone 8 : Validation Rule

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.

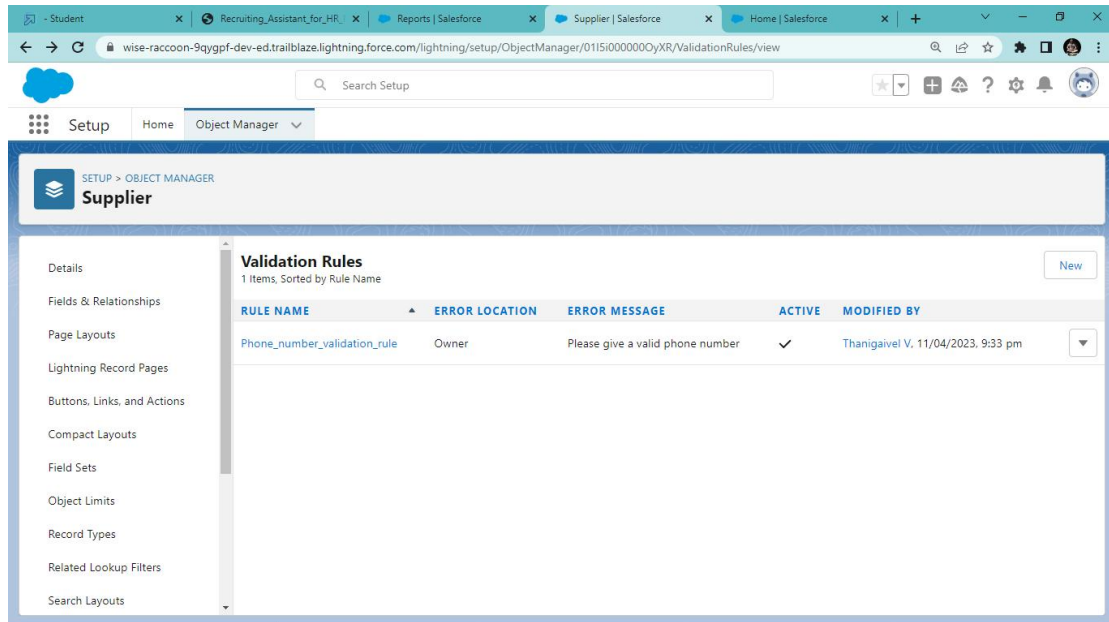
The screenshot shows the Salesforce 'Supplier Validation Rule' configuration page. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Supplier Validation Rule' and includes a 'Validation Rule Edit' section with buttons for 'Save', 'Save & New', and 'Cancel'. The 'Rule Name' field is set to 'Phone_number_validation_rule'. The 'Active' checkbox is checked. The 'Description' field contains the text 'phone number should not be more than or less than 10 digits'. Below this is the 'Error Condition Formula' section, which includes an example formula and a 'More Examples...' link. The formula field contains the expression: `{!NOT (REGEX (Phone__c, "\d*? (\d\d*?) {10}*))}`. To the right of the formula field is a 'Functions' dropdown menu showing a list of functions: ABS, ACOS, ADDMONTHS, AND, and ASCII. A 'Quick Tips' box with a link to 'Operators & Functions' is also visible.

Give details as:

- 1. Rule name: Phone number validation rule.**
- 2. Active: checked**
- 3. Description: phone number should not be more than or less than 10 digits.**

4. Under Error Condition Formula: write the condition using insert field, insert operator, insert function

5. Using check syntax: check if the formula you entered is valid or not



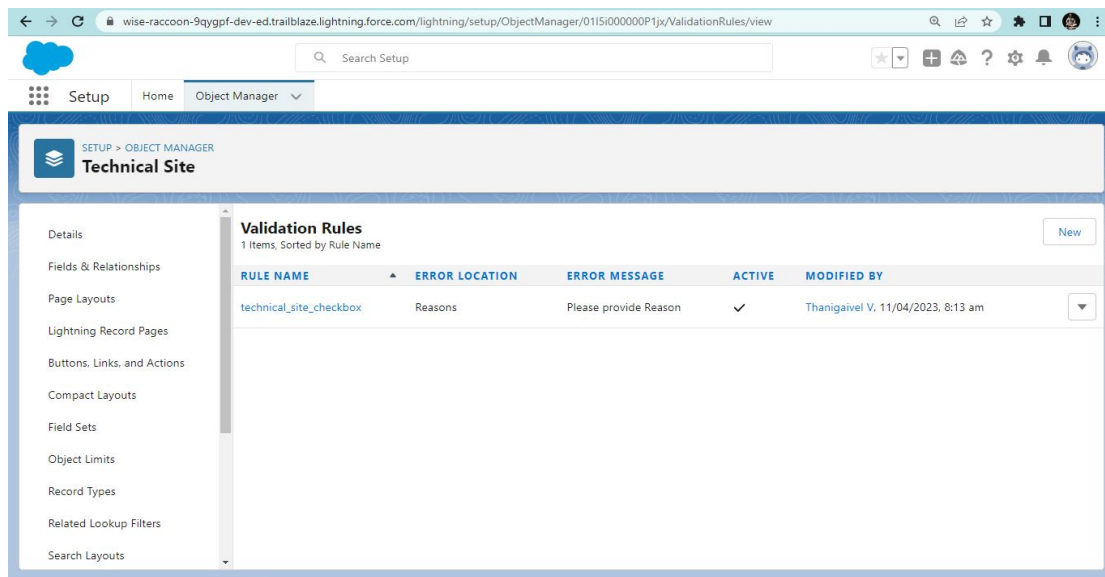
6. Error Message: Please give a valid phone number

7. Error location: select field

8. Save

Activity-2

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



Milestone 9 : Profile

What is a profile?

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

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

Activity

Creation on profile:

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

wise-raccoon-9qygpf-dev-ed.trailblaze.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

profile

Users

Profiles

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

Profiles

All Profiles Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
Edit Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Del ...	Sales profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Read Only	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Partner Community User	Partner Community	<input type="checkbox"/>

1-25 of 42 0 Selected Page 1 of 2

1. From the list of profiles, find Standard User.

2. Click Clone.

3. For Profile Name, enter Event user profile.

4. Click Save

wise-raccoon-9qygpf-dev-ed.trailblaze.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_u%2Fperms%2Fui%2Fprofile%2FProfileClo...

Search Setup

Setup Home Object Manager

profile

Users

Profiles

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

Clone Profile

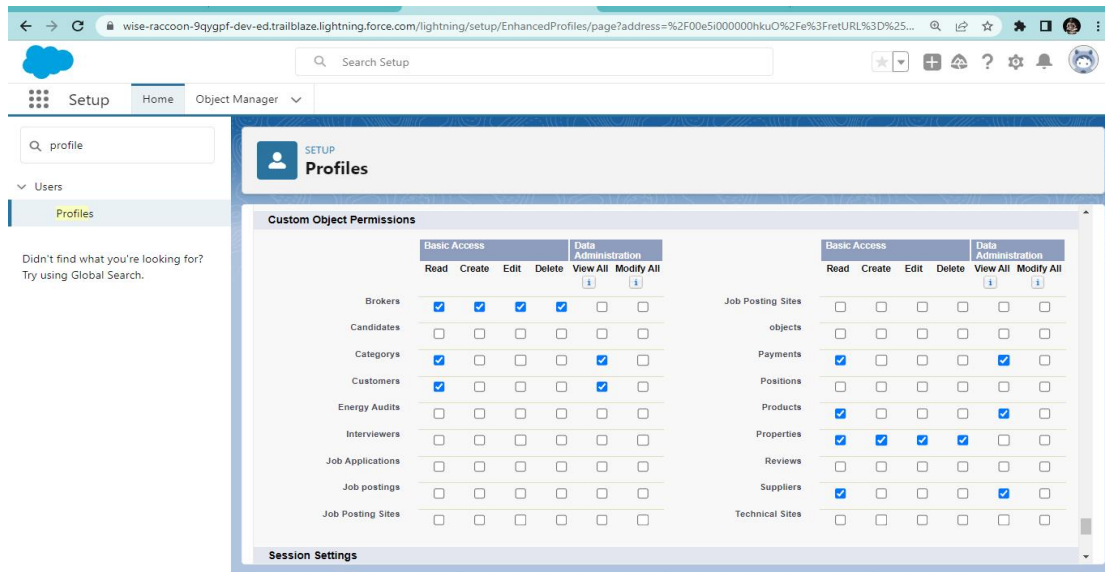
Enter the name of the new profile.

You must select an existing profile to clone from. Required Information

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text"/>

Save Cancel

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



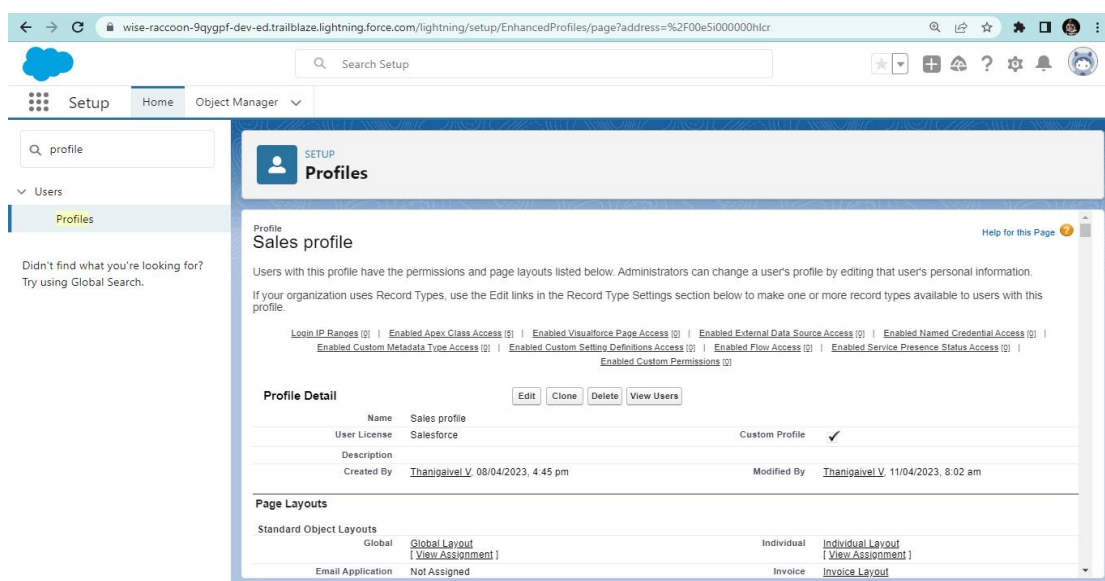
The screenshot shows the Salesforce Setup page for a profile. The left sidebar contains a search bar and a list of items: Users, Profiles, and a search result for 'profile'. The main content area is titled 'Profiles' and shows a table of 'Custom Object Permissions'. The table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The 'View All' column is highlighted for several objects, indicating that all permissions are granted.

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Brokers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Candidates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Categories	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Energy Audits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interviewers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job Applications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job postings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job Posting Sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job Posting Sites objects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Properties	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Technical Sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Activity-2

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



The screenshot shows the Salesforce Setup page for a profile. The left sidebar contains a search bar and a list of items: Users, Profiles, and a search result for 'profile'. The main content area is titled 'Profiles' and shows the 'Sales profile' details. The profile name is 'Sales profile', the user license is 'Salesforce', and the custom profile checkbox is checked. The page layouts section shows the standard object layouts and the individual layouts for the profile.

Profile Detail

Name: Sales profile
User License: Salesforce
Description: Salesforce
Created By: Thanigaiavel V. 08/04/2023, 4:45 pm
Modified By: Thanigaiavel V. 11/04/2023, 8:02 am

Page Layouts

Standard Object Layouts	Individual
Global: Global Layout View Assignment	Individual: Individual Layout View Assignment
Email Application: Not Assigned	Invoice: Invoice Layout

Milestone 10: User

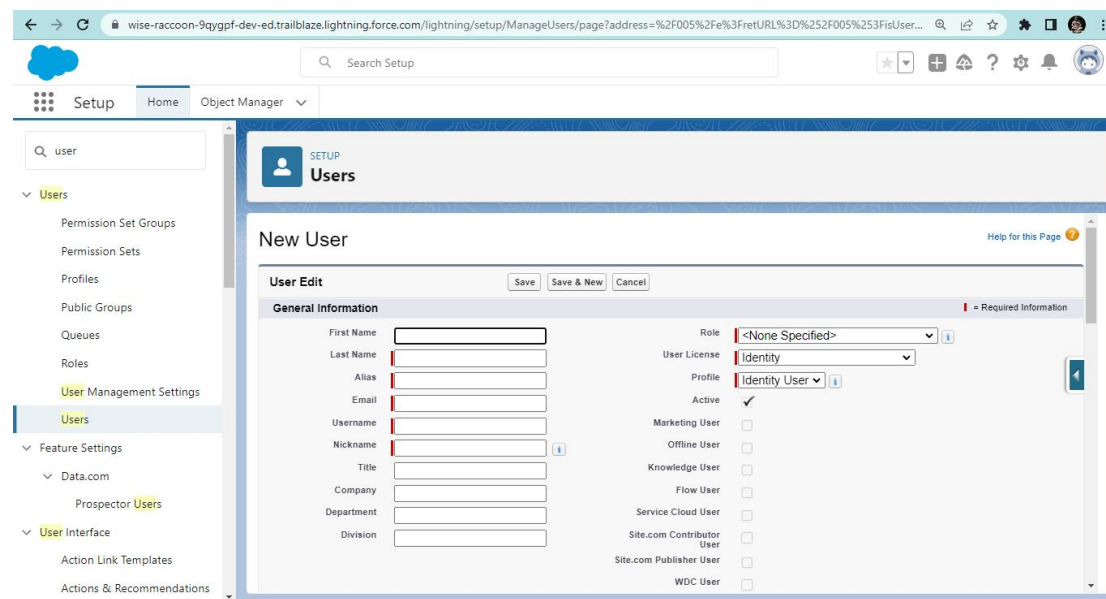
What is a user?

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Activity-1

Creating a User:

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



The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'user' entered and a list of navigation items including Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled 'New User' and contains a 'User Edit' form. The form has tabs for 'General Information' and 'Advanced Information'. The 'General Information' tab is active, showing fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. On the right side of the form, there are dropdown menus for Role (set to '<None Specified>'), User License (set to 'Identity'), and Profile (set to 'Identity User'). Below these are checkboxes for Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User.

* **First Name:** Sanjay

* **Last Name:** Gupta

* **Alias:** Sanj

* **Email:** provide your personal email id for future reference

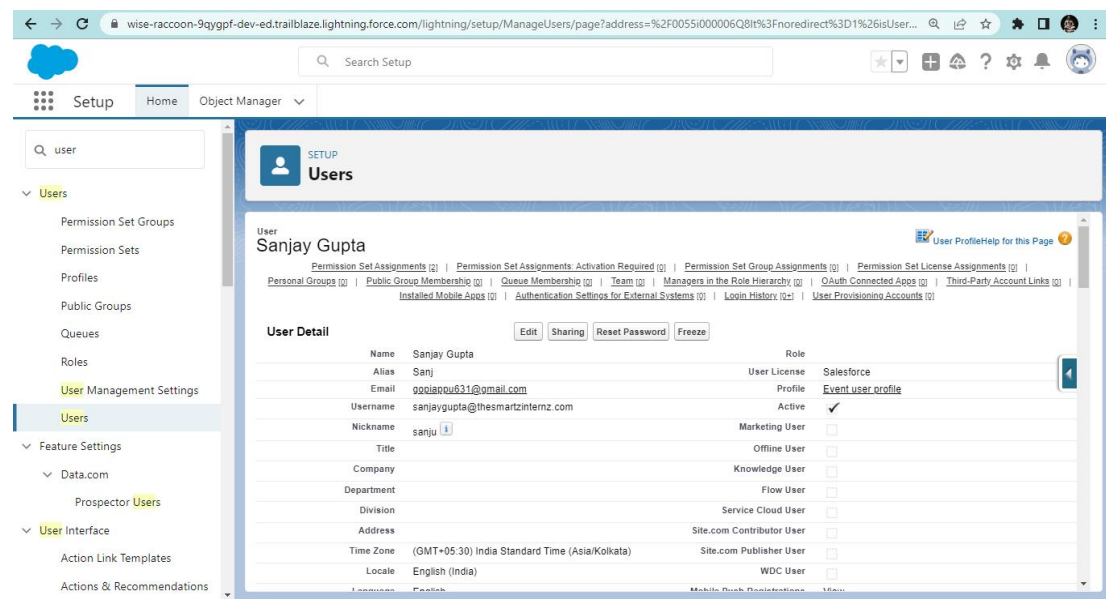
* **Username:** sanjaygupta@thesmartbridge.com

* **Nickname:** Sanju

* **Role:** leave it as default

* **User License:** Salesforce

* **Profile:** Event User Profile



The screenshot shows the Salesforce Setup page for User Management. The left sidebar contains a search bar and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospectors, User Interface, Action Link Templates, and Actions & Recommendations. The main content area displays the 'User Detail' for 'Sanjay Gupta'. The user's details are as follows:

User Detail	
Name	Sanjay Gupta
Alias	Sanj
Email	ggolacou631@gmail.com
Username	sanjaygupta@thesmartinternz.com
Nickname	sanju
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Role	Salesforce
User License	Salesforce
Profile	Event user profile
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Notification User	<input type="checkbox"/>

Activity-2

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

wise-raccoon-9qygp-dev-ed.trailblaze.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%2F005%253FisUser...

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

SETUP Users

New User

Help for this Page

User Edit Save Save & New Cancel

General Information Required Information

First Name		Role	<None Specified>
Last Name		User License	Identity
Alias		Profile	Identity User
Email		Active	<input checked="" type="checkbox"/>
Username		Marketing User	<input type="checkbox"/>
Nickname		Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>

wise-raccoon-9qygp-dev-ed.trailblaze.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2F00006Q8m3%3Fnoredirect%3D1%26isUs...

Setup Home Object Manager

user

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Data.com

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Action Link Templates

SETUP Users

User Abhilash Garapati

User Profile Help for this Page

Permission Set Assignments (1) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Connected Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail Edit Sharing Reset Password Freeze

Name	Abhilash Garapati	Role	
Alias	abhil	User License	Salesforce Platform
Email	ggqiaqpu631@gmail.com	Profile	Standard Platform User
Username	abhilashgarapati@thesmartinternz.com	Active	<input checked="" type="checkbox"/>
Nickname	abhila	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>

Mobile Book Distribution

Milestone 11 : Permission set

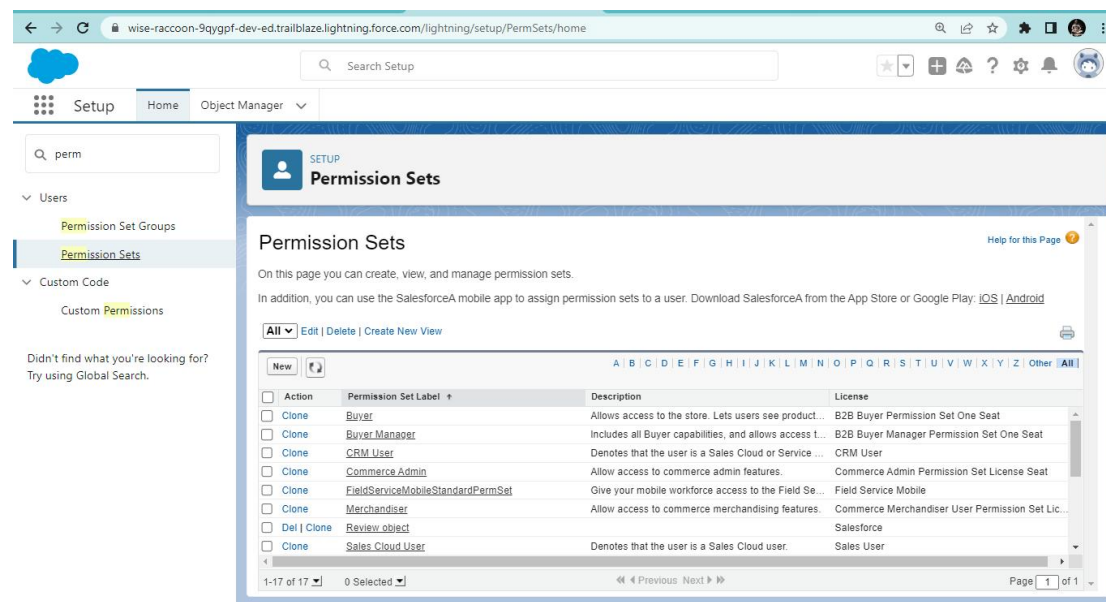
What is the Permission set?

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

Activity-1

Creating a Permission Set:

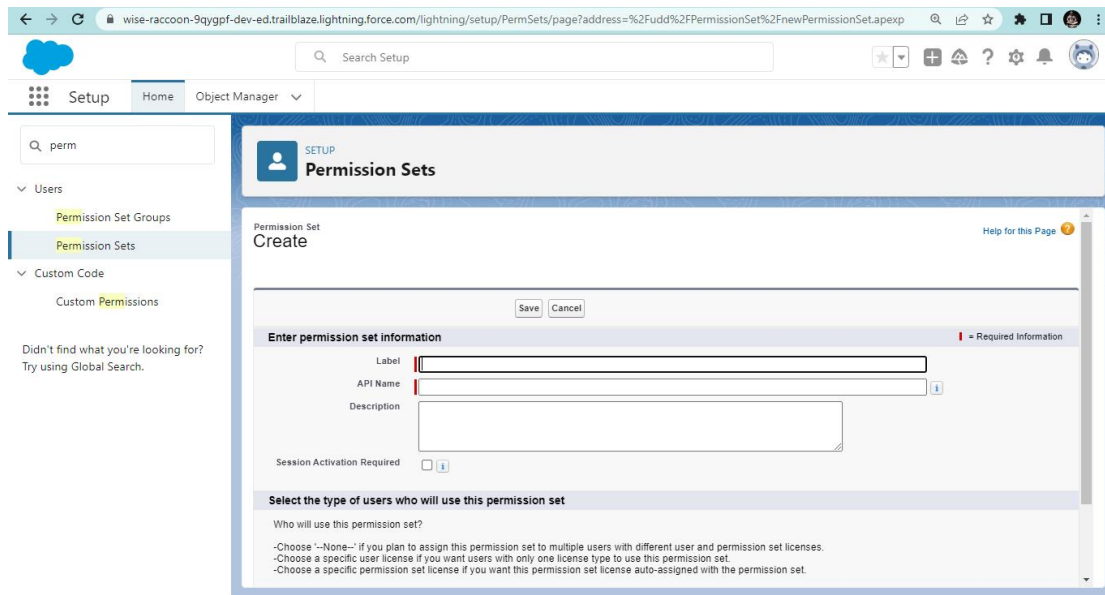
1. From setup search “permission sets” in quick find and select permission set then click on New.



The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'perm' entered and a list of categories: Users, Permission Set Groups, Permission Sets (highlighted), Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and includes a 'New' button. Below the title is a table of existing permission sets.

Action	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see product...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access t...	B2B Buyer Manager Permission Set One Seat
Clone	CRM User	Denotes that the user is a Sales Cloud or Service ...	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Se...	Field Service Mobile
Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set Lic...
Del Clone	Review object		Salesforce
Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User

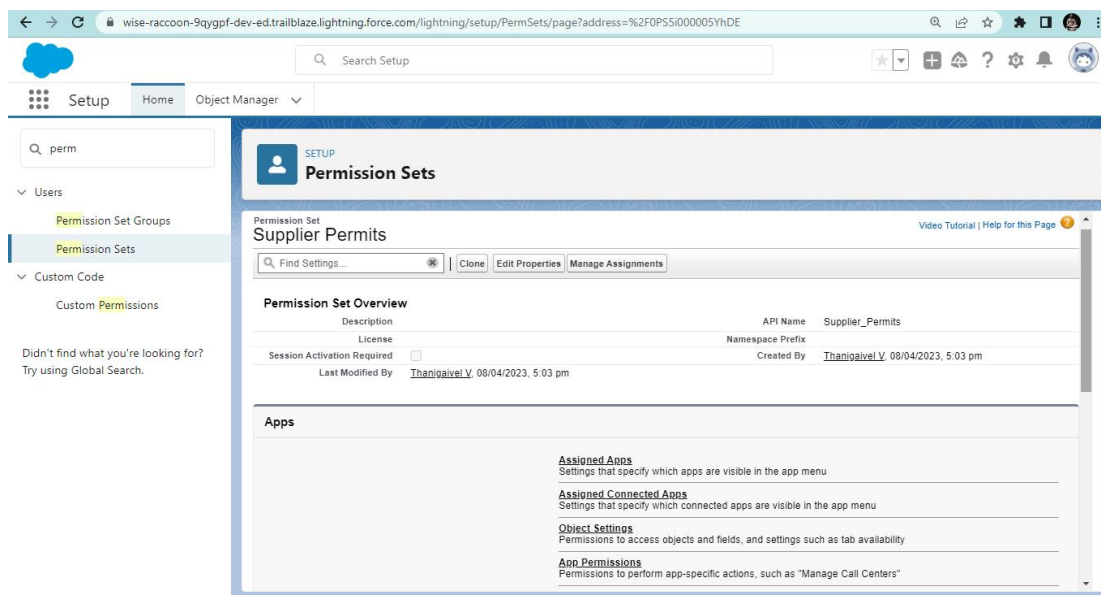
2. Enter label as: Supplier Permits and Save.



3. After saving the permission click on the Manage assignment

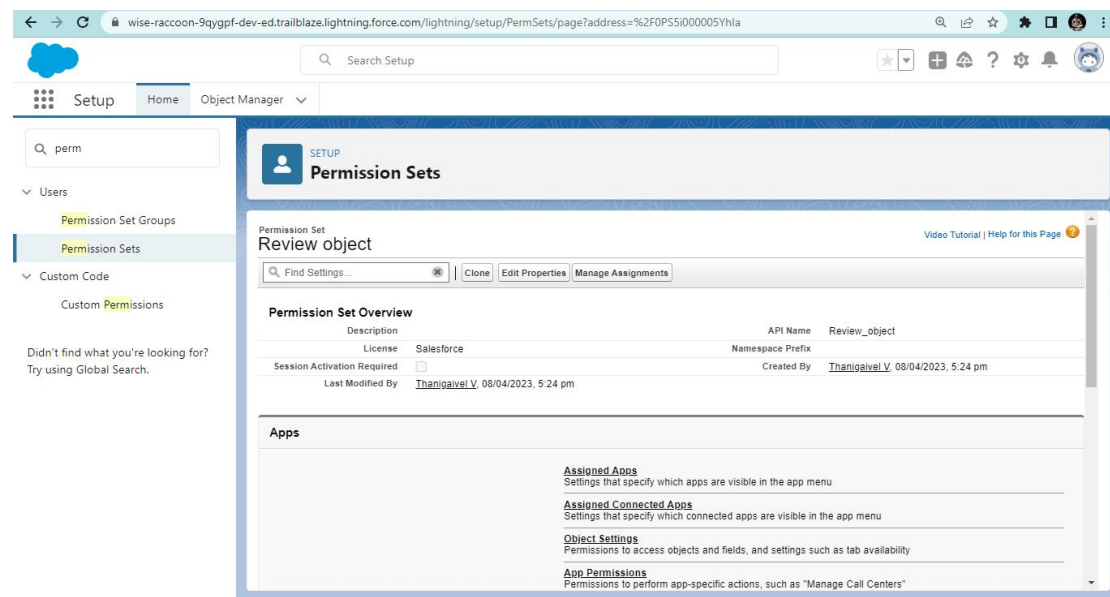
4. Now click on the Add Assignment

5. Now select the users and click on save



Activity-2

Create a Permission set for Review object



Milestone 12: Reports

What are Reports?

A report is a list of records that meet the criteria you define. It's displayed in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity-1

Reports:

1. From the Reports tab, click New Report.

← → ↻ wise-raccoon-9qygpf-dev-ed.trailblaze.lightning.force.com/lightning/o/Report/home?queryScope=mrui

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports More

Reports

Recent

13 items

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	job posting		Private Reports	Thanigaivel V	10/4/2023, 10:57 am	
Created by Me	review		Private Reports	Thanigaivel V	10/4/2023, 10:51 am	
Private Reports	CEO		Private Reports	Thanigaivel V	10/4/2023, 11:17 am	
Public Reports	Recruiting For HR Managers		Public Reports	Thanigaivel V	10/4/2023, 10:33 am	
All Reports	All fields		All fields	Thanigaivel V	10/4/2023, 10:43 am	
	Case Status		Private Reports	Thanigaivel V	9/4/2023, 5:30 pm	
FOLDERS	Web Leads		Private Reports	Thanigaivel V	9/4/2023, 5:09 pm	
All Folders	Opportunity Stages		Private Reports	Thanigaivel V	9/4/2023, 5:33 pm	
Created by Me	Open Opportunities This Year		Private Reports	Thanigaivel V	9/4/2023, 5:15 pm	
Shared with Me	Accounts with Early Stage Opportunities		Private Reports	Thanigaivel V	9/4/2023, 5:02 pm	
FAVORITES						

To Do List

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

← → ↻ wise-raccoon-9qygpf-dev-ed.trailblaze.lightning.force.com/one/app#eyJjb21wb251bnREZWY0IjYXZBvcnRzOnJlcG9ydEJ1aWw6ZXIiLCJhdHRyaWV1dGVzZjpw...

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports More

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Select a Report Type

Search Report Types...

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Accate	Standard

Details

Accounts

Standard Report Type

Start Report

Details

Fields (63)

Created By You

Recruiting For HR Managers

Last Used 4/10/2023

To Do List

wise-raccoon-9qygpf-dev-ed.trailblaze.lightning.force.com/one/app#eyJjb21wb25lbnREZWYiOiJyZXhvcnRzOnJlcG9ydeE1aWxkZXIiLCJhdHRyaWJ1dGVzIjp...

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports More

REPORT New Accounts Report Accounts Add Chart Save & Run Save Close Run

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

Outline Filters 2

Groups

GROUP ROWS

Add group...

Columns

Add column...

Last Activity x

Account Owner x

Account Name x

Billing State/Province x

Type x

Rating x

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1		- Thanigaivel V	Edge Communications	TX	Customer - Direct	Hot	06/04/2023
2		- Thanigaivel V	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	06/04/2023
3		- Thanigaivel V	Pyramid Construction Inc.	-	Customer - Channel	-	06/04/2023
4		- Thanigaivel V	Dickenson plc	KS	Customer - Channel	-	06/04/2023
5		- Thanigaivel V	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	06/04/2023
6		- Thanigaivel V	United Oil & Gas Corp.	NY	Customer - Direct	Hot	06/04/2023
7		- Thanigaivel V	Express Logistics and Transport	OR	Customer - Channel	Cold	06/04/2023
8		- Thanigaivel V	University of Arizona	AZ	Customer - Direct	Warm	06/04/2023
9		- Thanigaivel V	United Oil & Gas, UK	UK	Customer - Direct	-	06/04/2023
10		- Thanigaivel V	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	06/04/2023
11		- Thanigaivel V	GenePoint	CA	Customer - Channel	Cold	06/04/2023
12		- Thanigaivel V	sForce	CA	-	-	06/04/2023

To Do List

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

Activity-2

Create a report for review and Job Posting Objects.

Student Recruiting_Assistant_for_HR_Ms- Reports | Salesforce Home | Salesforce

wise-raccoon-9qygpf-dev-ed.trailblaze.lightning.force.com/lightning/o/Report/home?queryScope=mru

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports More

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Search recent reports...

New Report New Folder

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Shared with Me	Open Opportunities This Year		Private Reports	Thanigaivel V	9/4/2023, 5:15 pm	
FAVORITES	Accounts with Early Stage Opportunities		Private Reports	Thanigaivel V	9/4/2023, 5:02 pm	

To Do List

Thank
you

