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

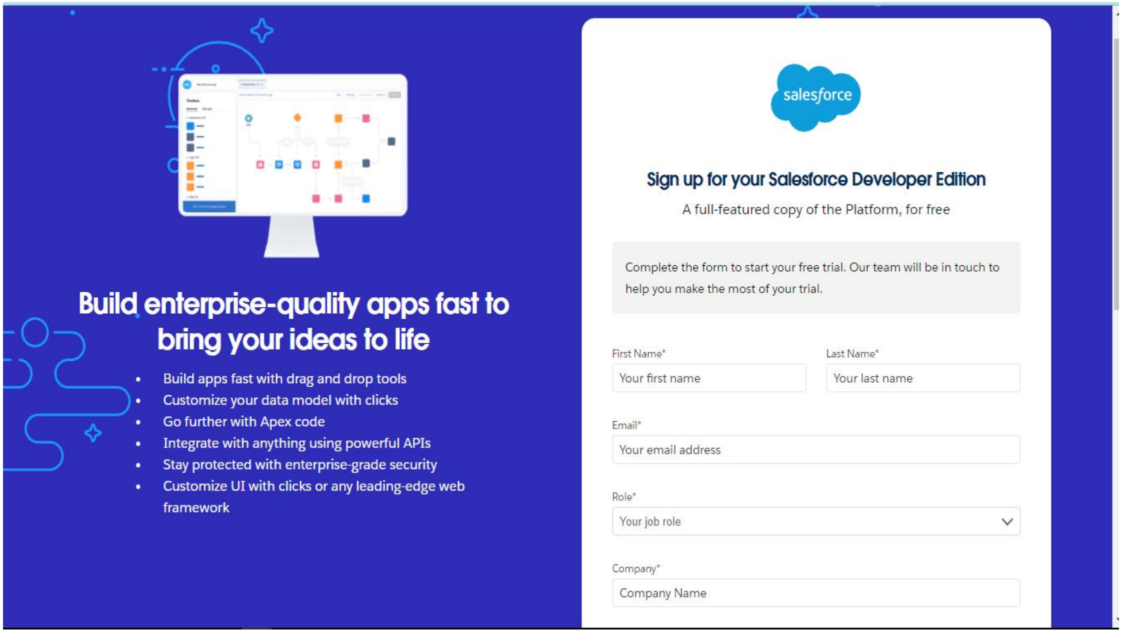
Members:
Tamilkumaran .S
Thulasi .S
Vignesh .A
Vinayagamoorthy .S

Milestone 1: Creation of developer account

Activity-1

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

- Search Developer.salesforce.com



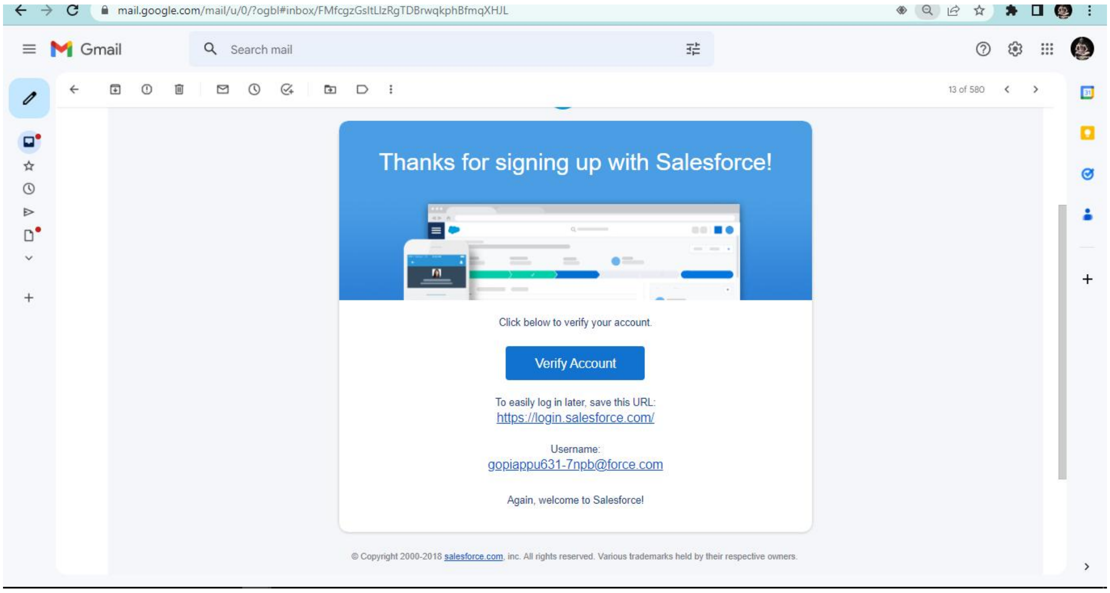
1. Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.

2. . Click sign me up, After a few min you will reserve a mail salesforce org and by using the can creatverify account link you e your new password.

3. Click save.

4. Search login.salesforce.com

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


mail.google.com/mail/u/0/?ogbl#inbox/FMfcgzGsltLlzRgTDBrwqkphBfmqXHJL
Gmail
Search mail
13 of 580
Thanks for signing up with Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://login.salesforce.com/
Username:
gopiappu631-7npb@force.com
Again, welcome to Salesforce!
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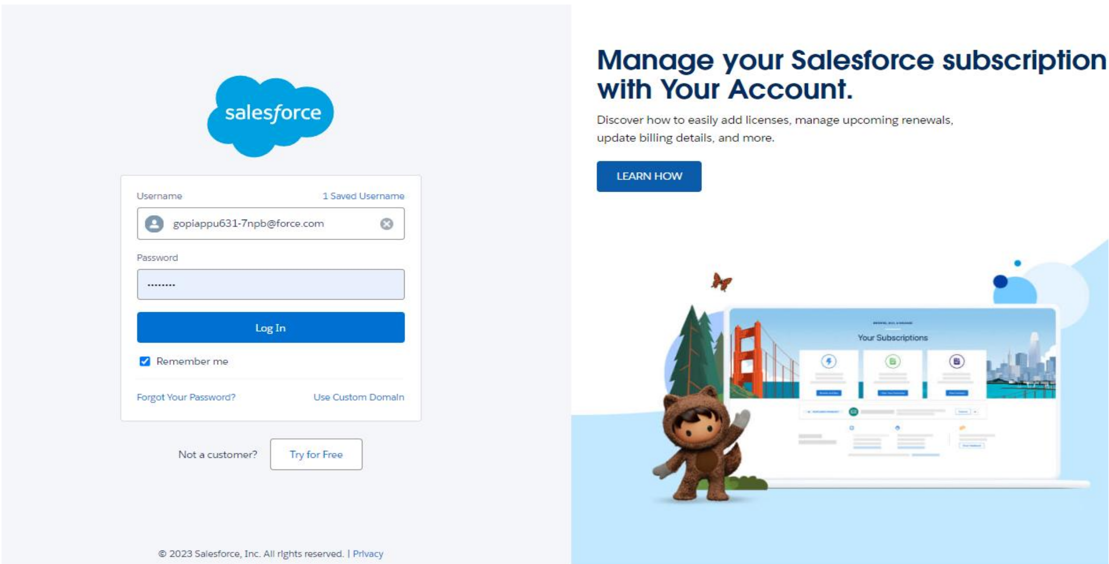
salesforce
Username
1 Saved Username
gopiappu631-7npb@force.com
Password
Log In
Remember me
Forgot Your Password?
Use Custom Domain
Not a customer?
Try for Free
© 2023 Salesforce, Inc. All rights reserved. | Privacy
Manage your Salesforce subscription with Your Account.
Discover how to easily add licenses, manage upcoming renewals, update billing details, and more.
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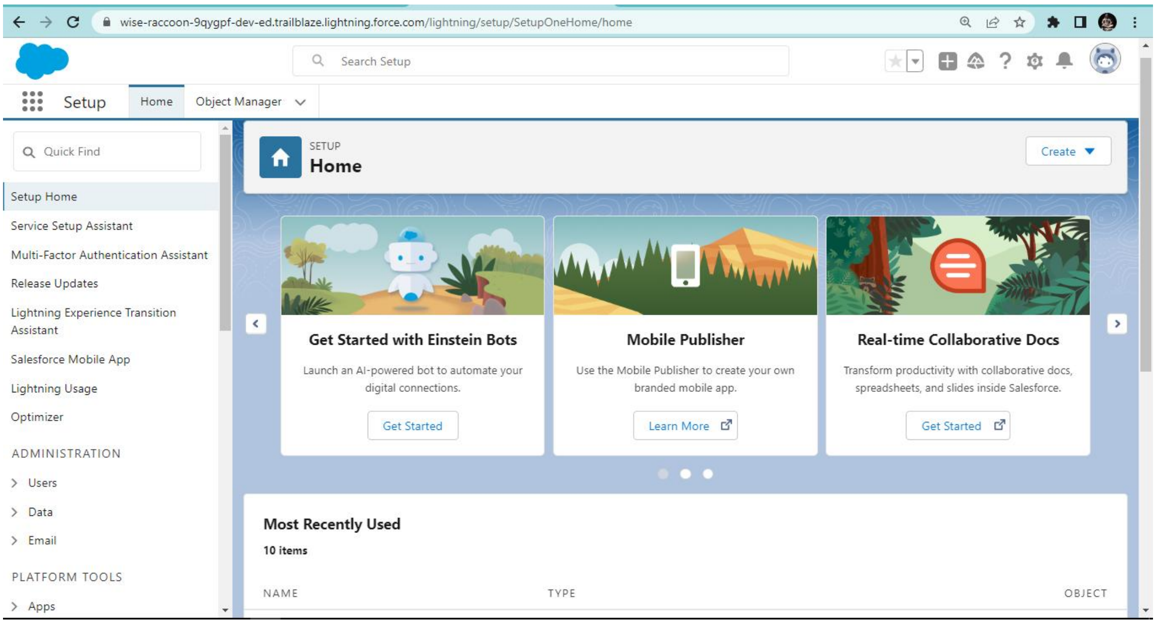
The setup page will appear as below.



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.

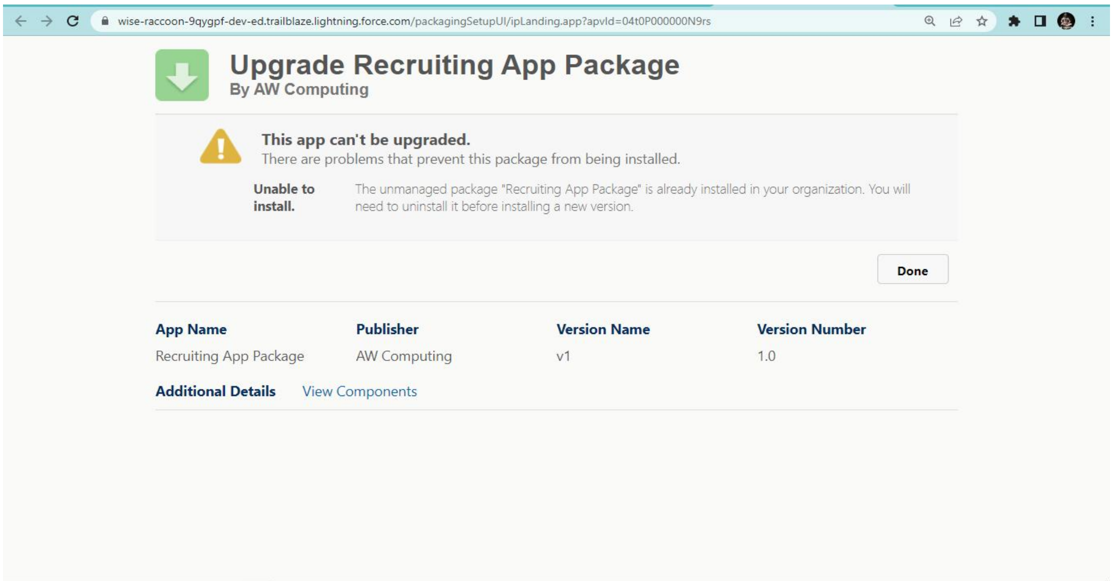
click to launch the App Launcher, then click Playground Starter and follow the steps

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.

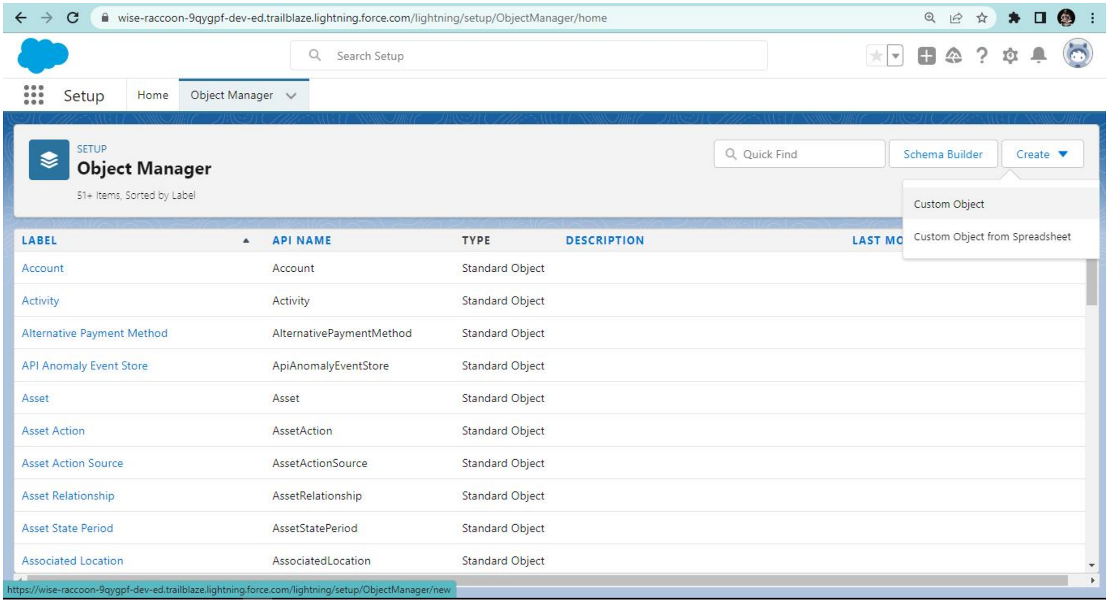
- **Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.**

Activity-1

Create a custom object for Job Posting Sites

1. From setup click on object manager.

2. Click create, select custom object.



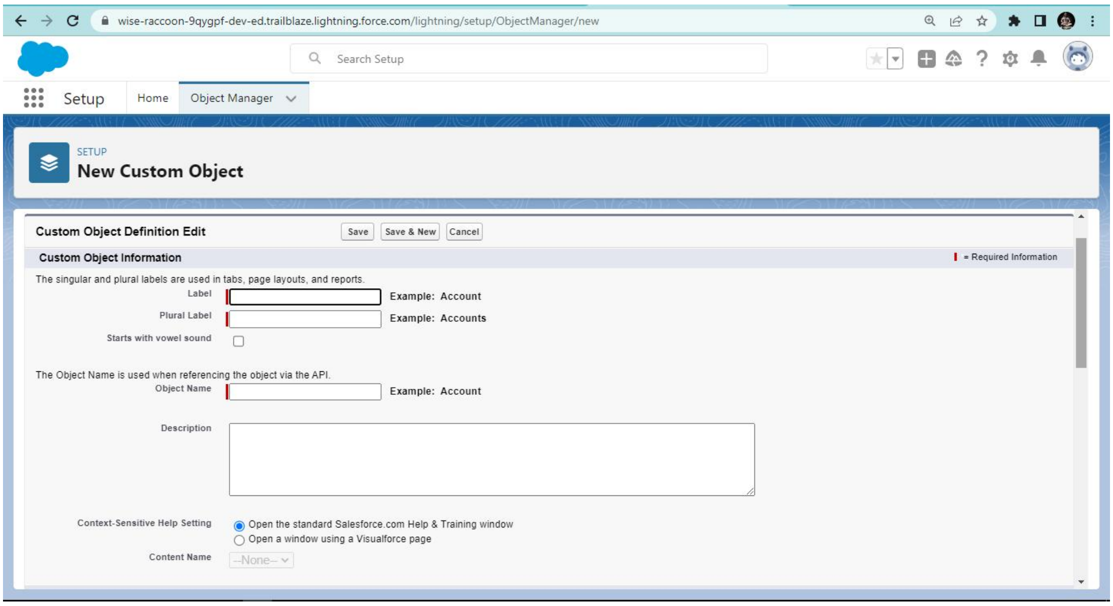
3. Fill in the label as "Job Posting Site".

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.



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?

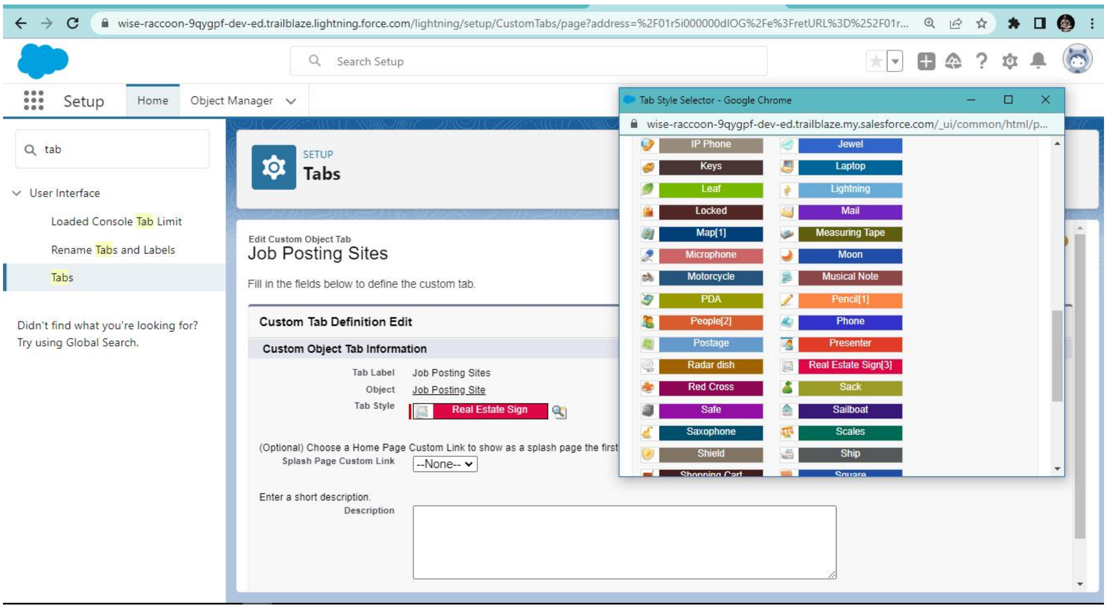
In Salesforce, a tab is a user interface element that allows users to navigate to different sections of the platform, such as Accounts, Contacts, Leads, and Opportunities. Tabs can also be used to access custom objects and custom pages. They are typically located at the top of the screen and can be customized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

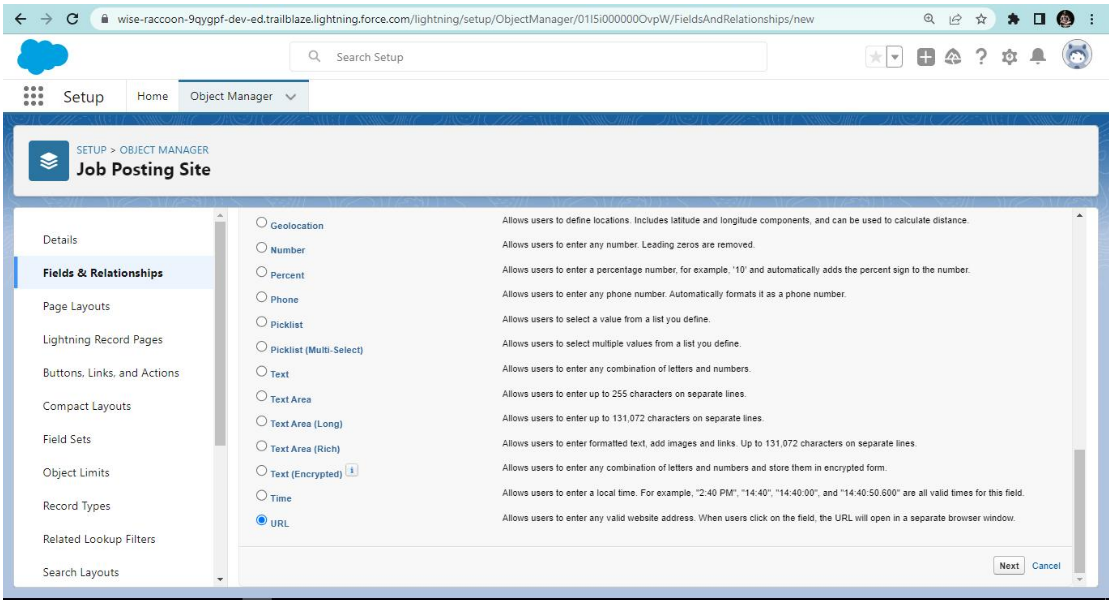
Activity-1

Create New Field for Job Posting site

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

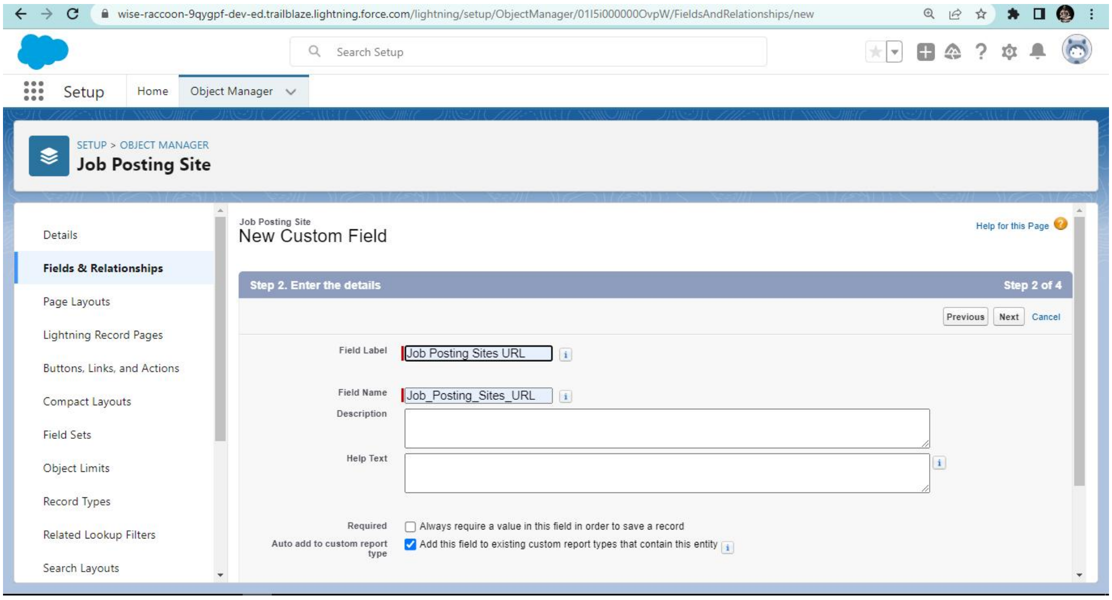
1. **Click on new**.

2. **Select the data type as URL**.



3. Click Next.

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



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?

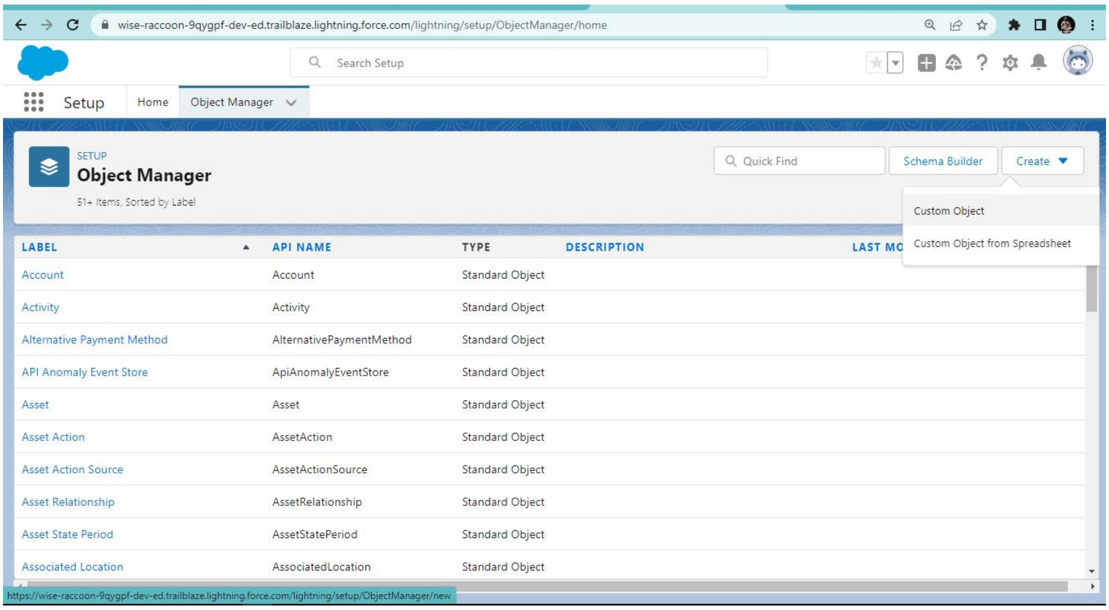
In Salesforce, a junction object is a custom object that is used to create a many-to-many relationship between two other objects. It connects two objects together by creating two one-to-many relationships, allowing data from both objects to be associated with each other in a single record. For example, 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.



3. Enter the label as "Job posting".

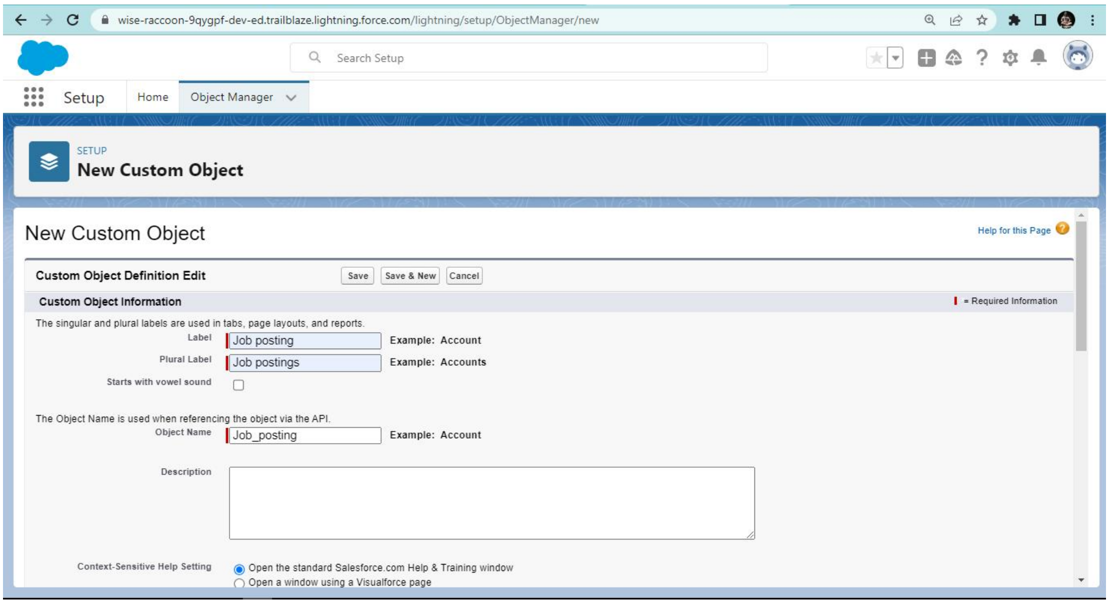
4. Enter the plural label as "Job postings".

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.



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?

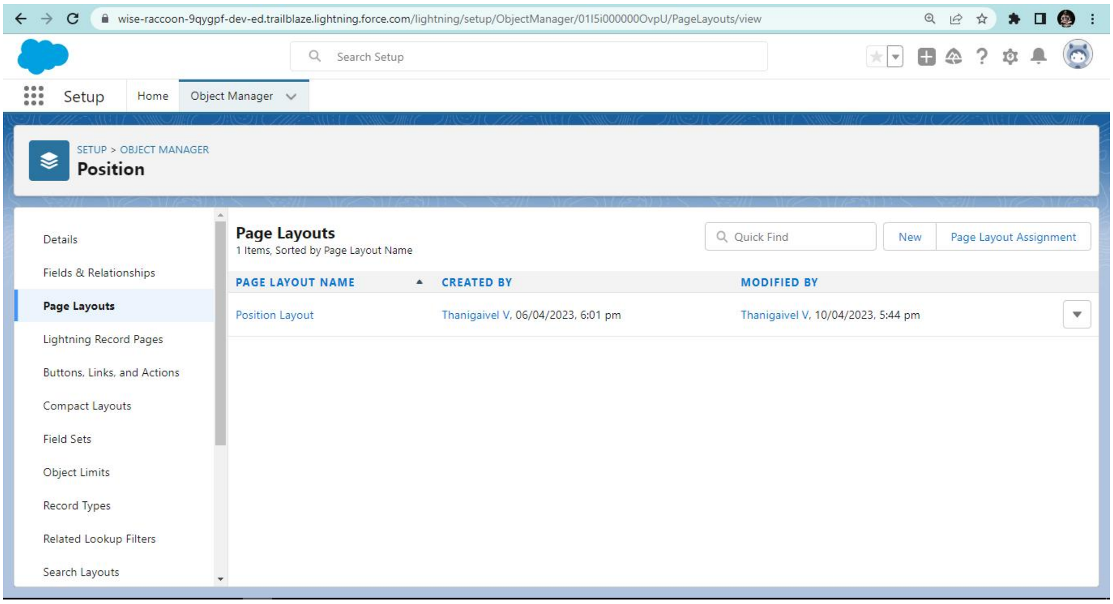
In Salesforce, a page layout is a visual design of a page that determines the organization and arrangement of fields, buttons, and other components on a page. Page layouts can be customized to show the fields and related information that are most relevant to different users, roles, and record types.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

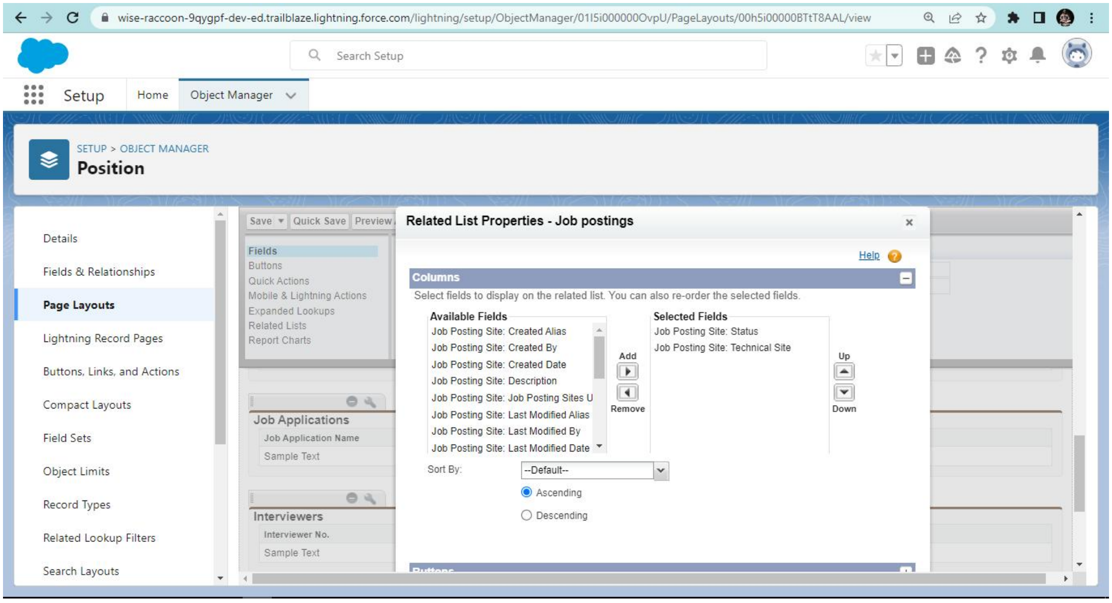
7. Job posting site : Status

8. Job posting site : Technical Site

9. Click add.

10. From the selected fields section,

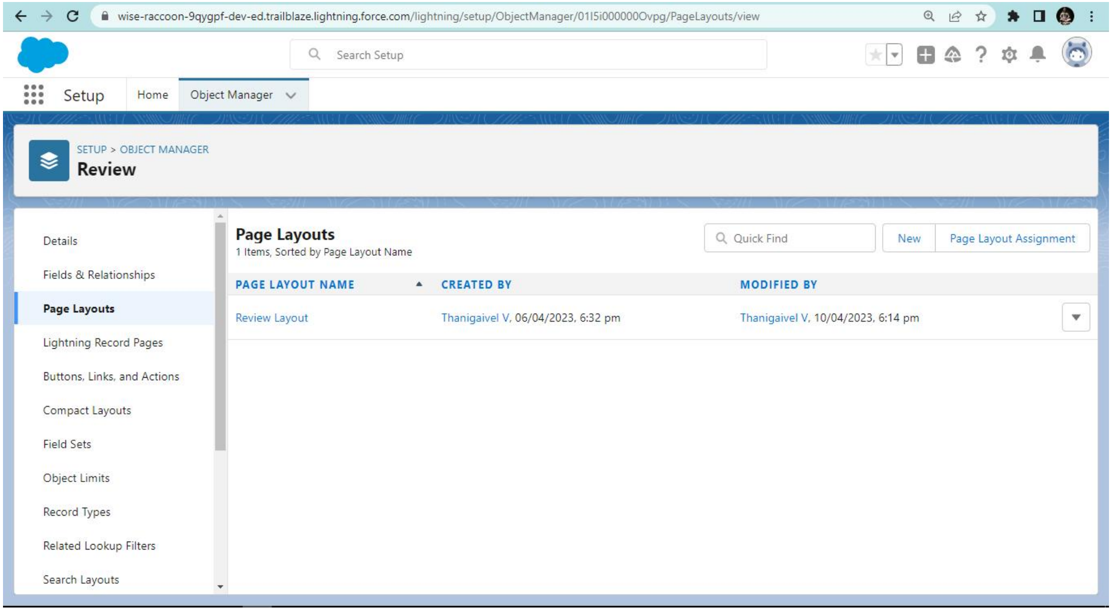
11. select job posting : Job posting number and click remove

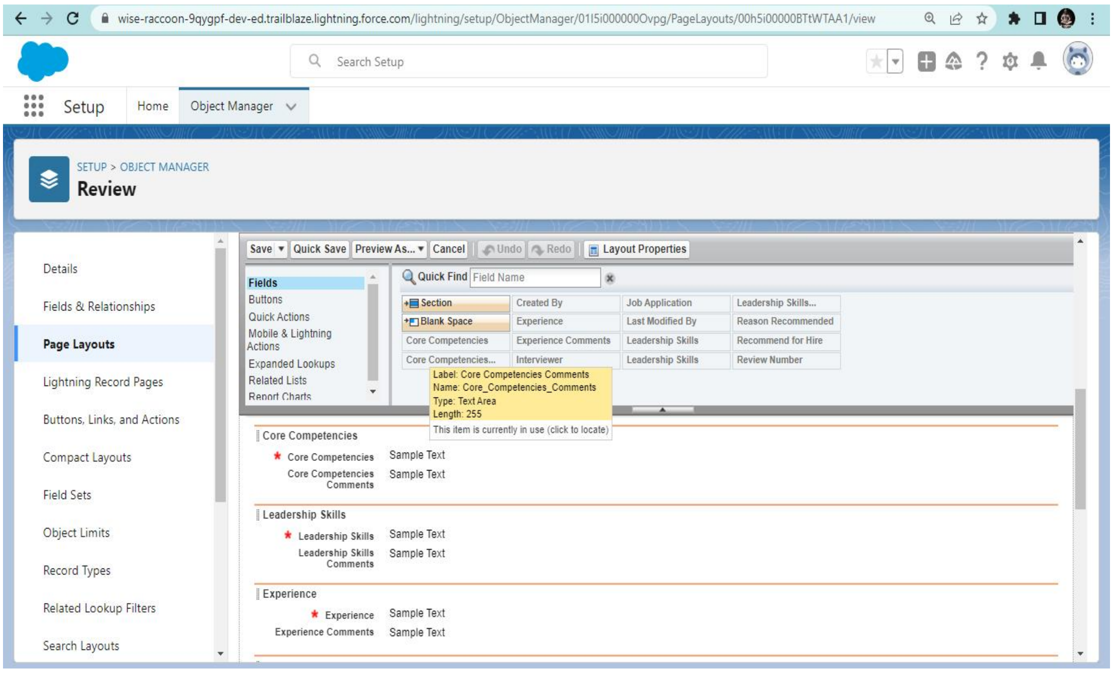


12. Click ok, then save.

Activity-2

Create a Page layout for Review Object





Milestone 8 : Validation Rule

What are Validations Rules?

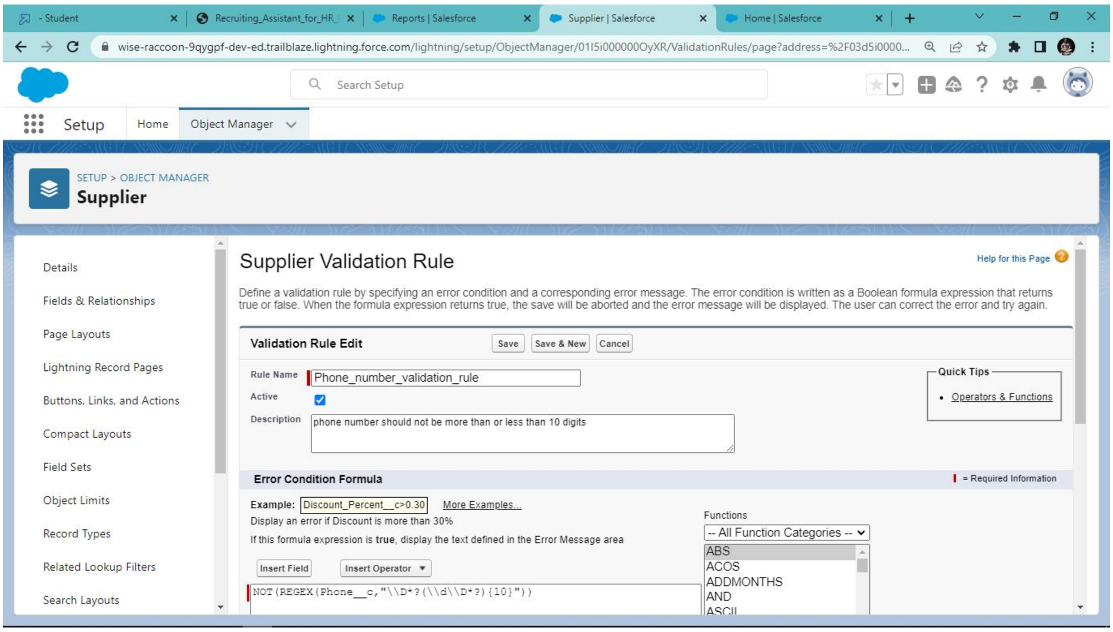
A validation rule is a process which checks out (validate) the inputs given by any user is correct or not according to your requirement.

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.



Give details as:

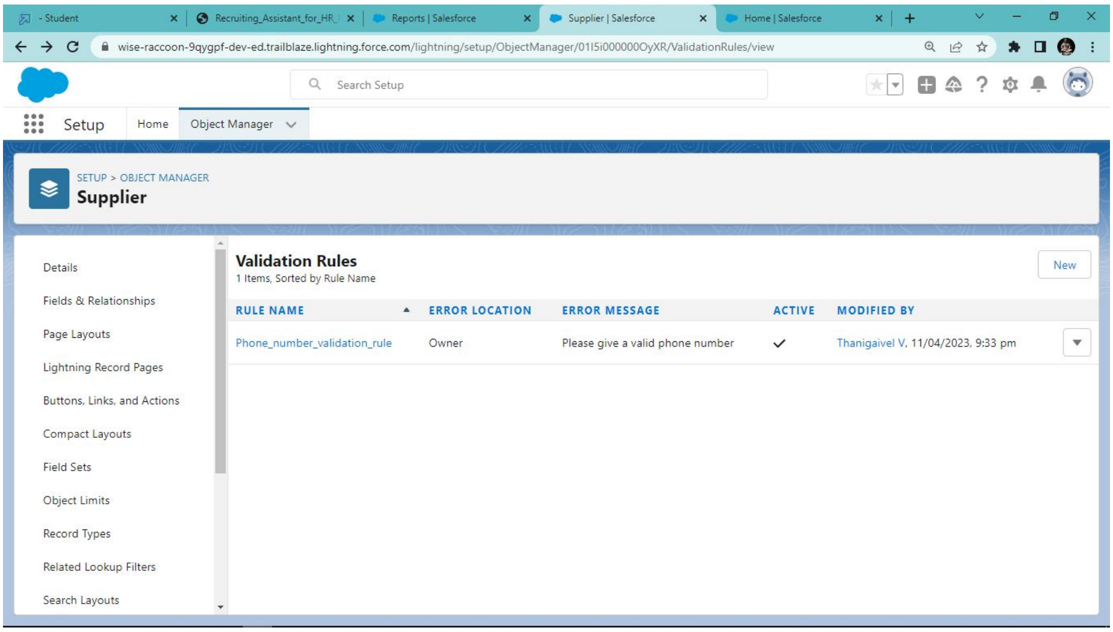
1. Rule name: Phone number validation rule.

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



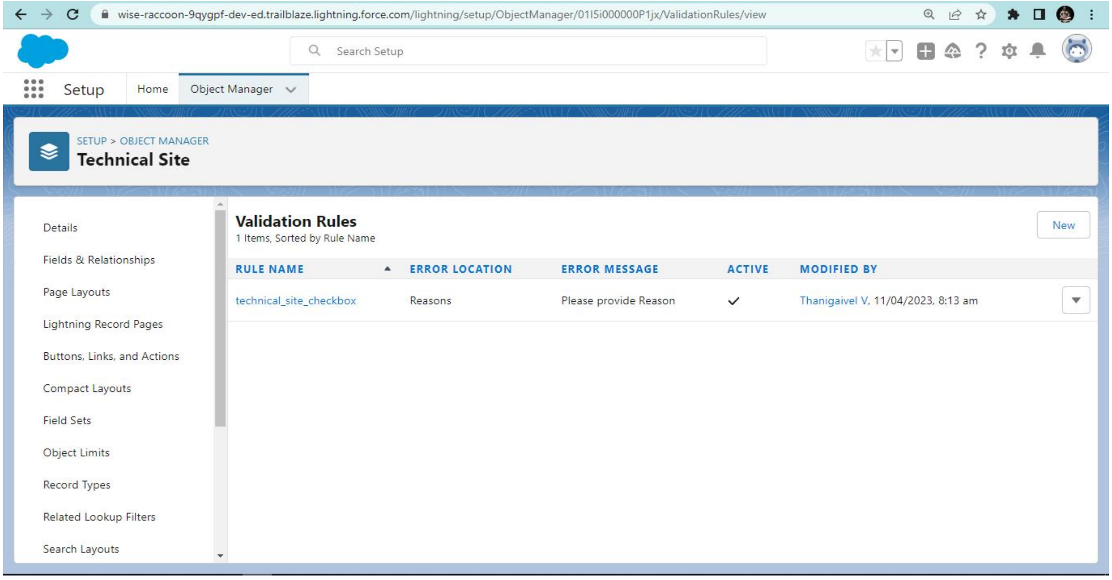
6. Error Message: Please give a valid phone number

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?

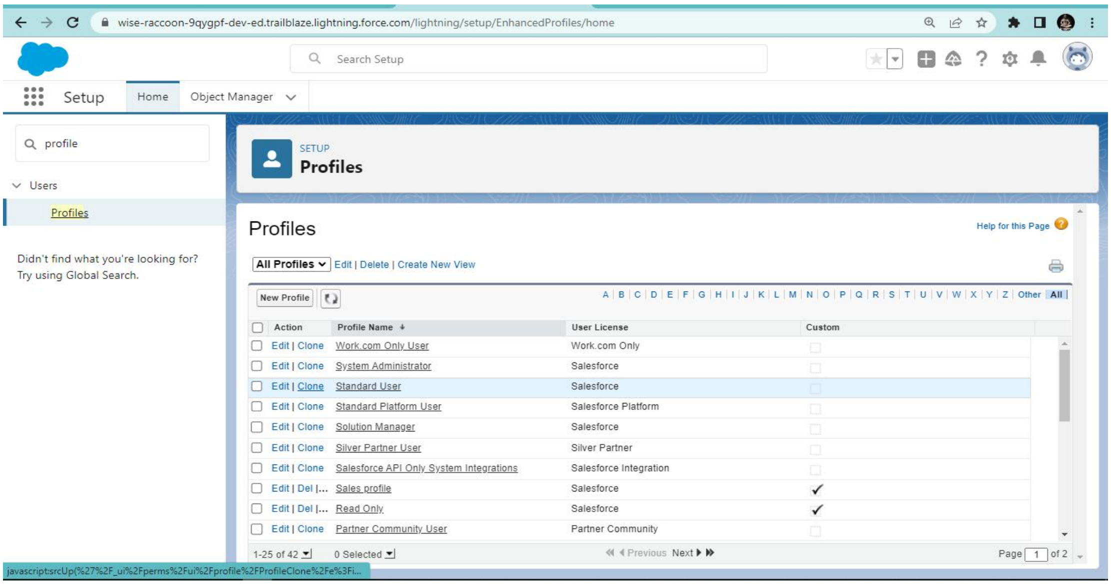
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

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

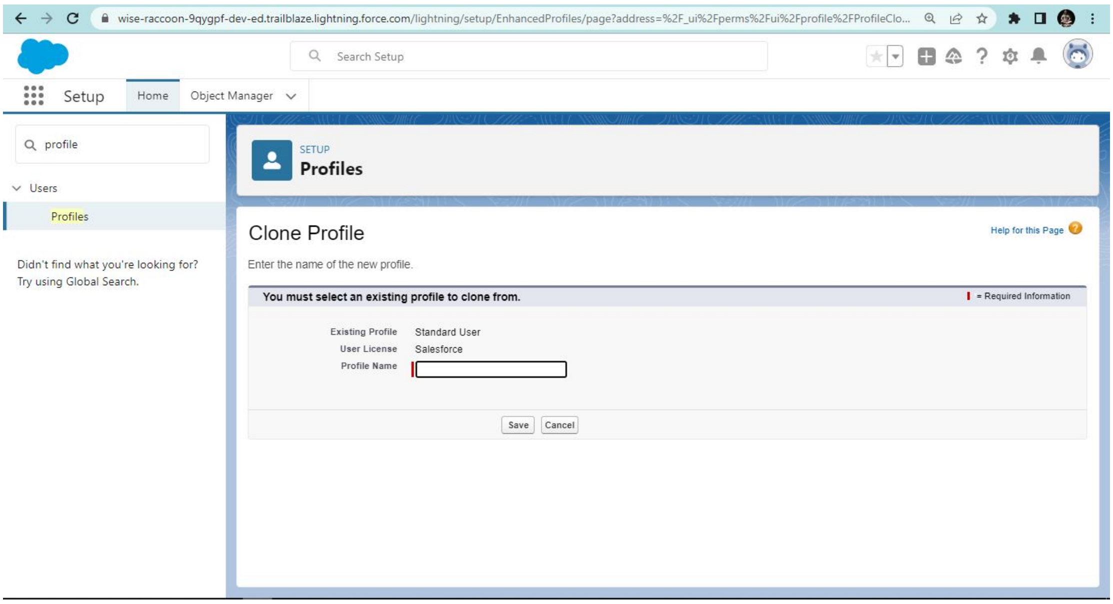
Activity

Creation on profile:

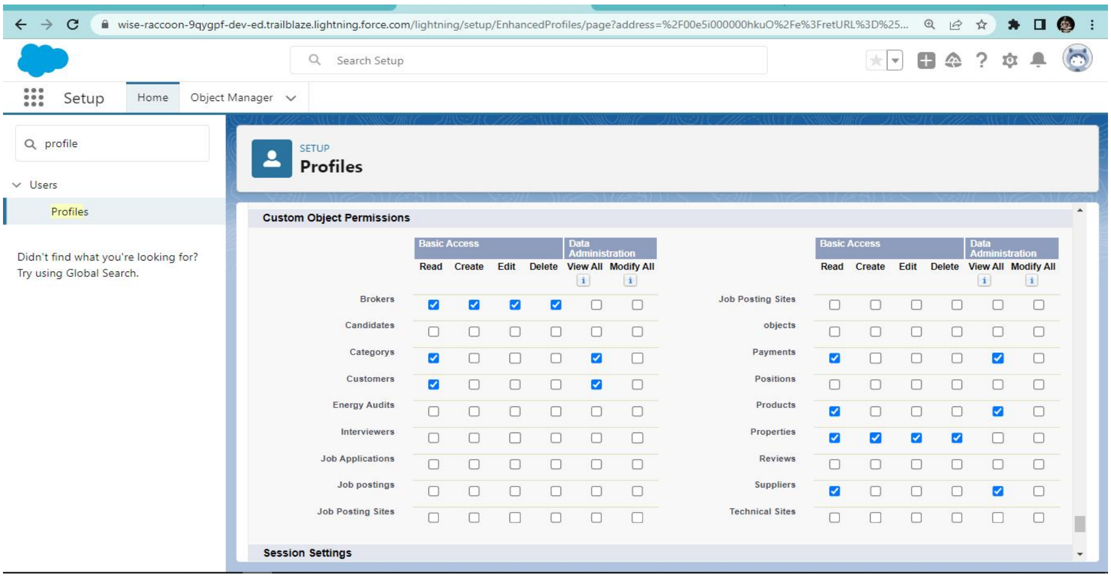
From Setup enter Profiles in the Quick Find box, and select Profiles.



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



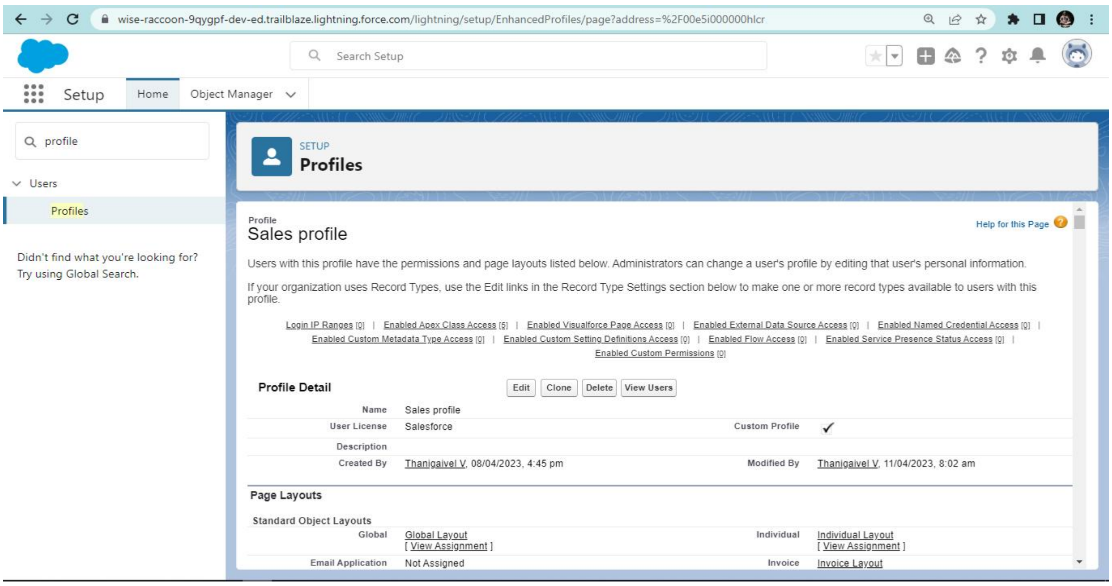
5. While still on the Event profile page, then click Edit.



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”.



Milestone 10: User

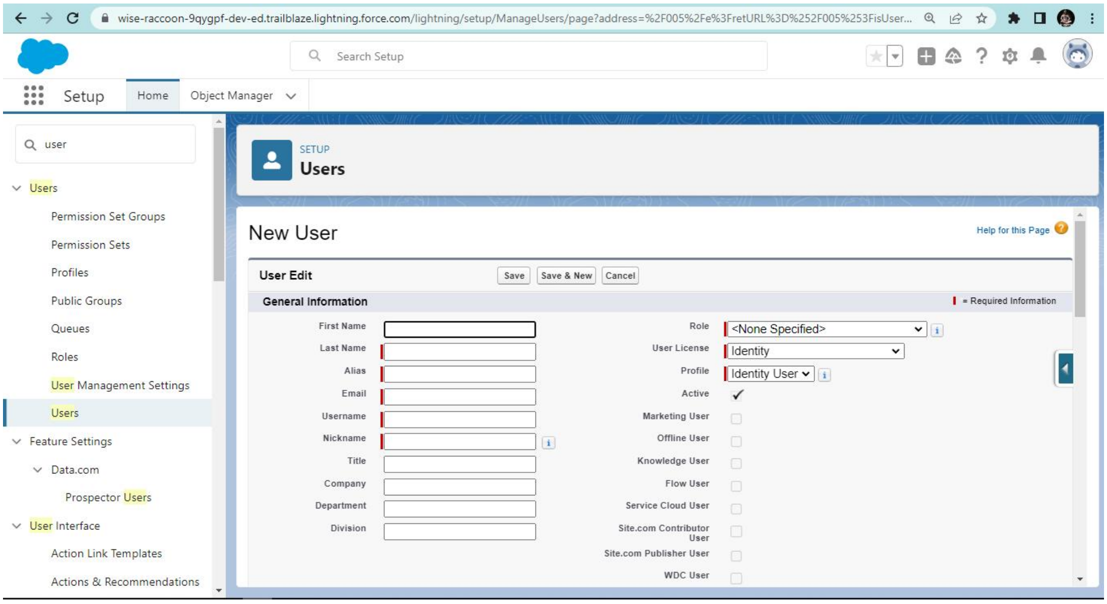
What is a user?

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



*** First Name: Sanjay**

*** Last Name: Gupta**

*** Alias: Sanj**

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

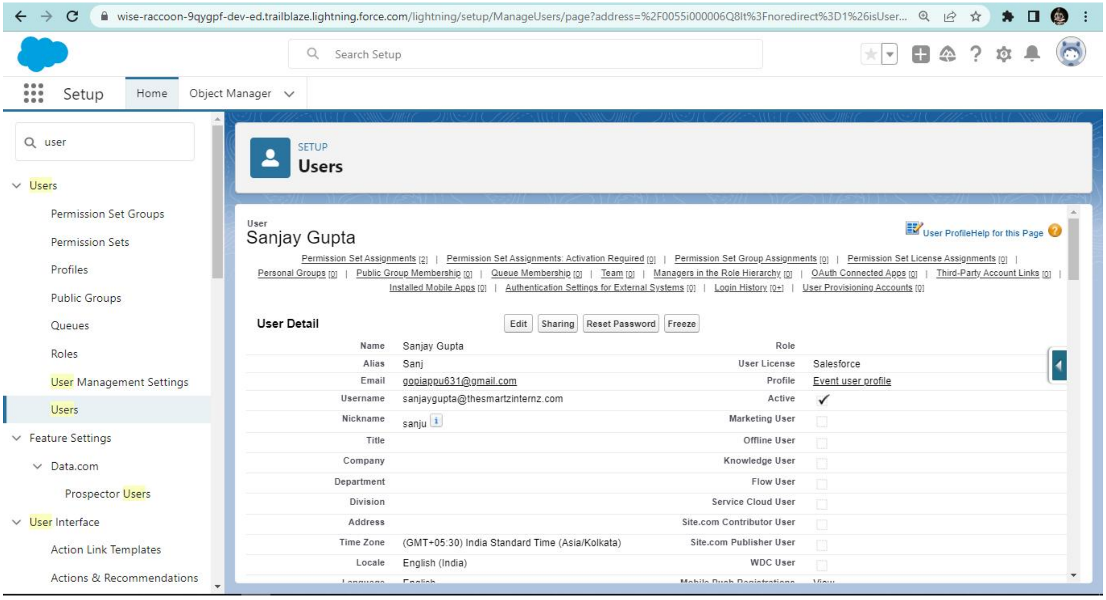
*** Username: sanjaygupta@thesmartbridge.com**

* Nickname: Sanju

* Role: leave it as default

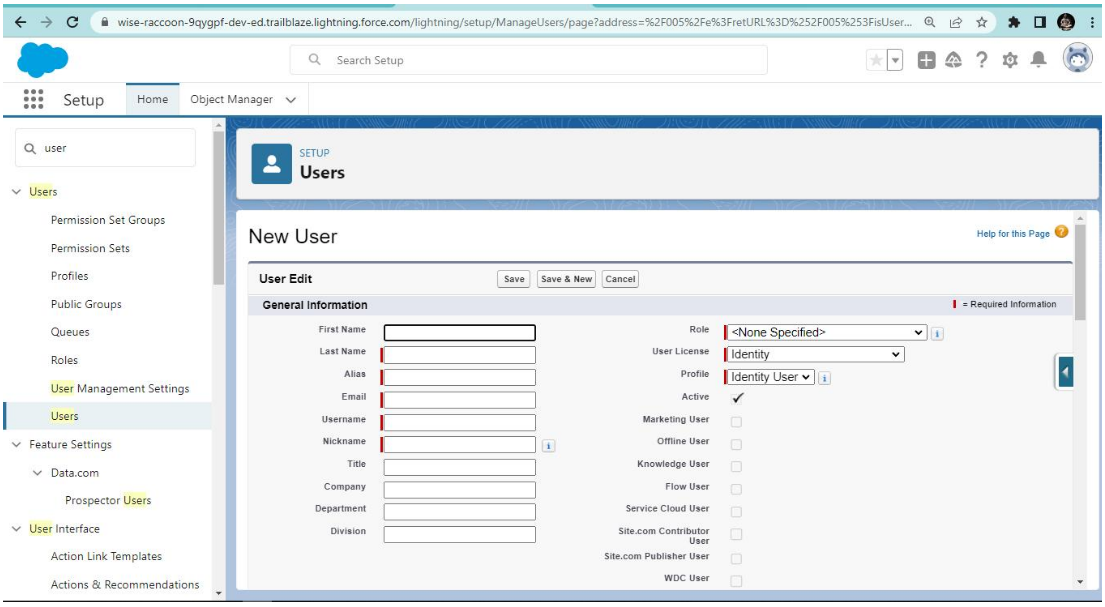
* User License: Salesforce

* Profile: Event User Profile

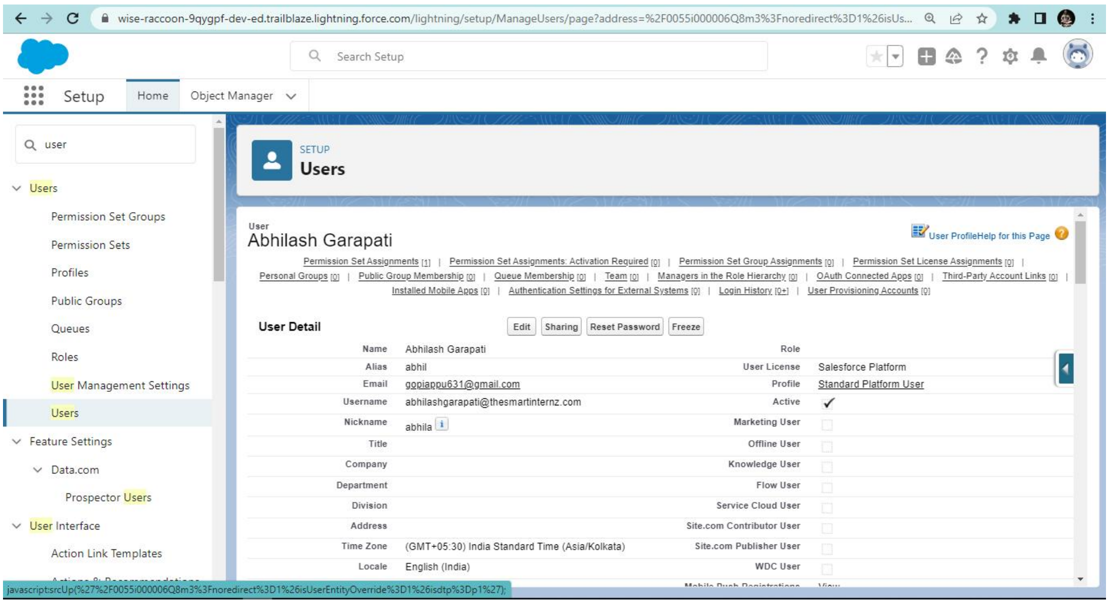


Activity-2

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



wise-raccoon-9qygpf-dev-ed.trailblaze.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUser...
Search Setup
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
Last Name
Alias
Email
Username
Nickname
Title
Company
Department
Division
Role
<None Specified>
User License
Identity
Profile
Identity User
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User



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Search Setup
Setup
Home
Object Manager
user
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Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
User Interface
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
Alias
abhil
Email
gopiappu631@gmail.com
Username
abhilashgarapati@thesmartinternz.com
Nickname
abhila
Title
Company
Department
Division
Address
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale
English (India)
Role
User License
Salesforce Platform
Profile
Standard Platform User
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
javascript:srcUp(%27%2F0055i000006Q8m3%3Fnoredirect%3D1%26isUserEntityOverride%3D1%26isdtp%3Dp1%27);

Milestone 11 : Permission set

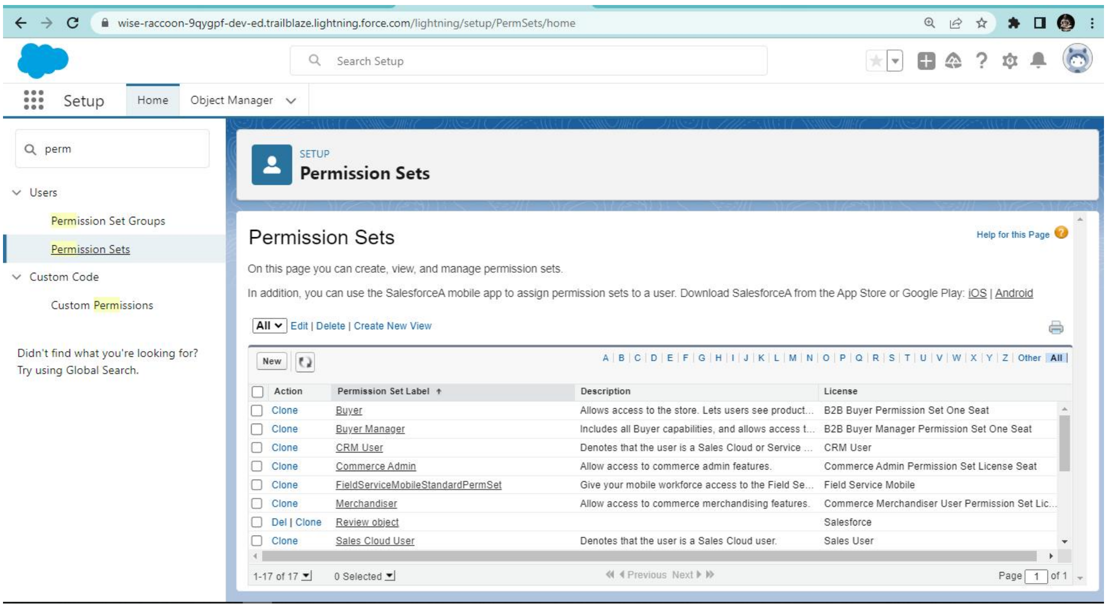
What is the Permission set?

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.

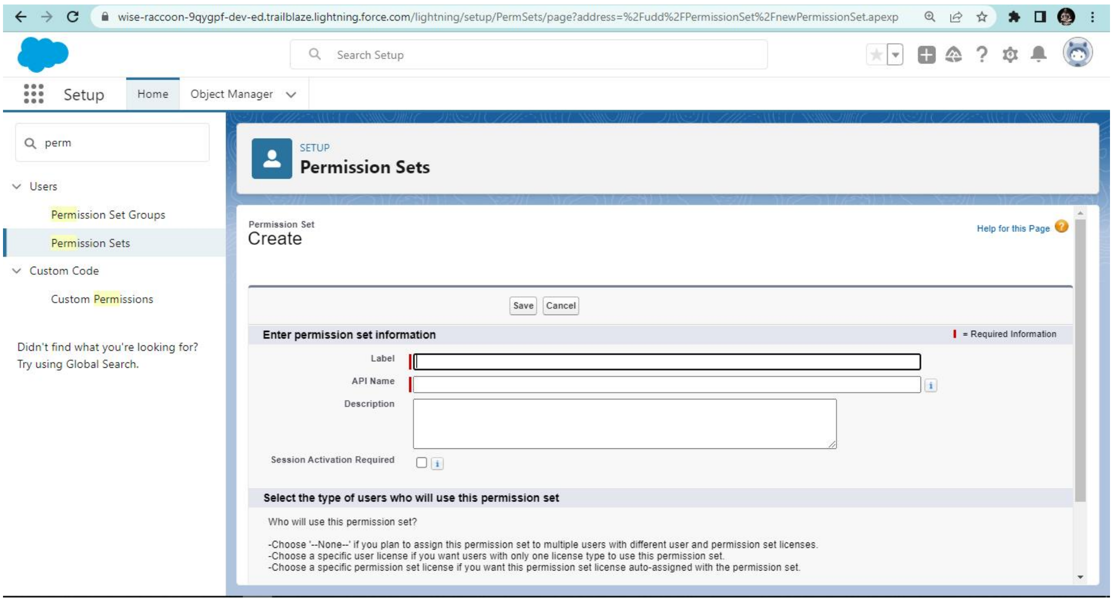
Activity-1

Creating a Permission Set:

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



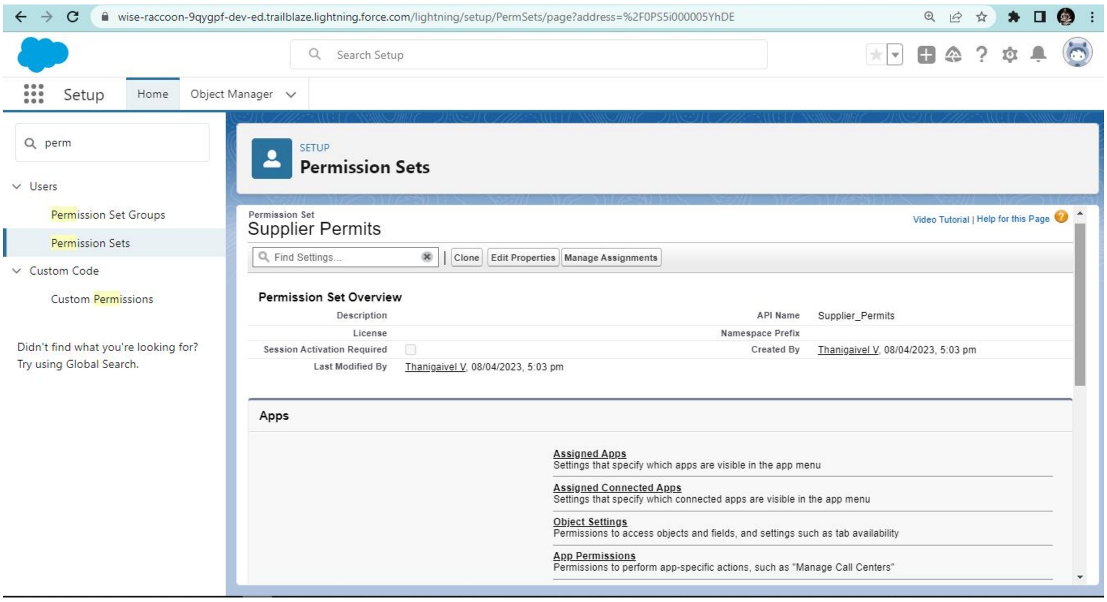
2. Enter label as: Supplier Permits and Save.



3. After saving the permission click on the Manage assignment

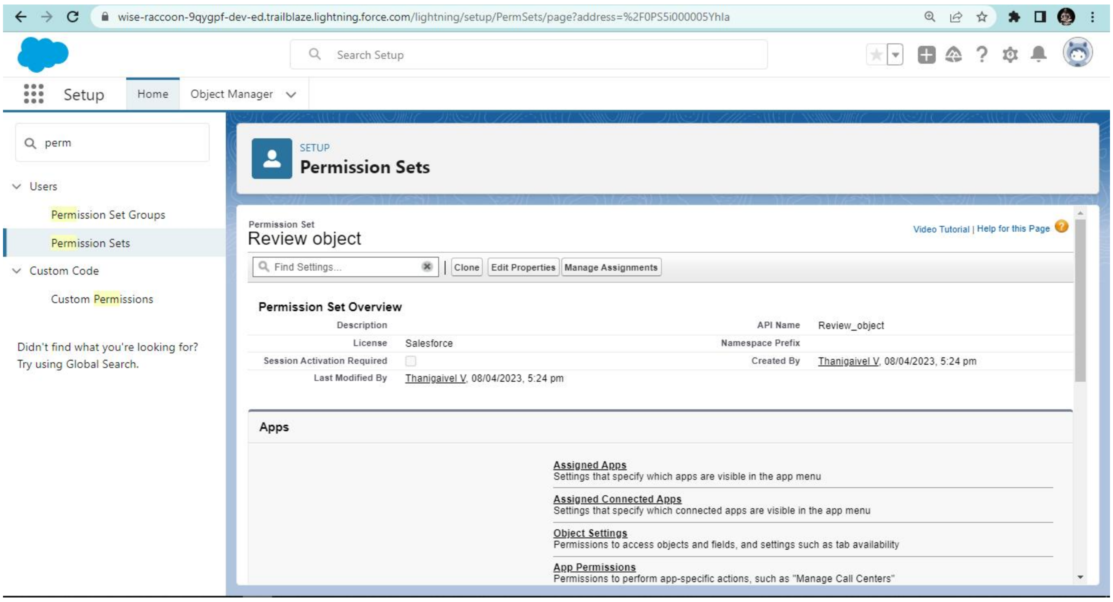
4. Now click on the Add Assignment

5. Now select the users and click on save



Activity-2

Create a Permission set for Review object



Milestone 12: Reports

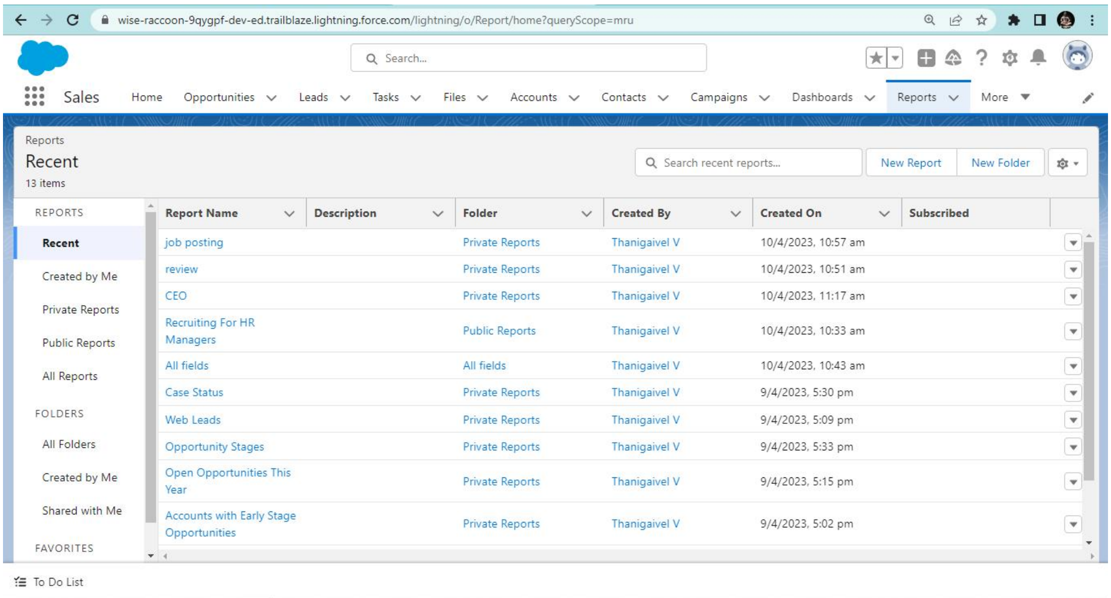
What are Reports?

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.

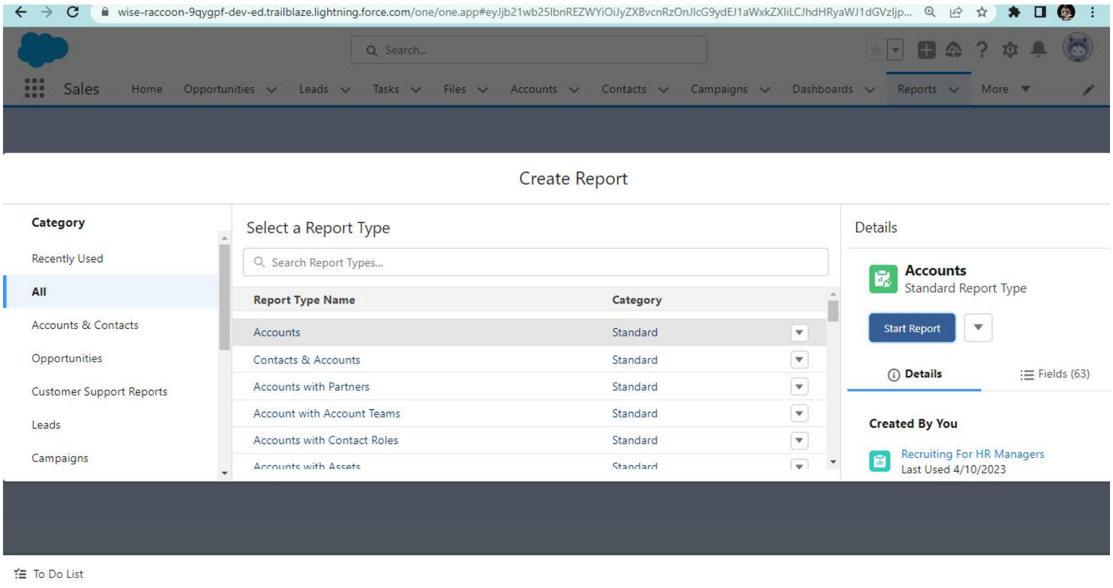
Activity-1

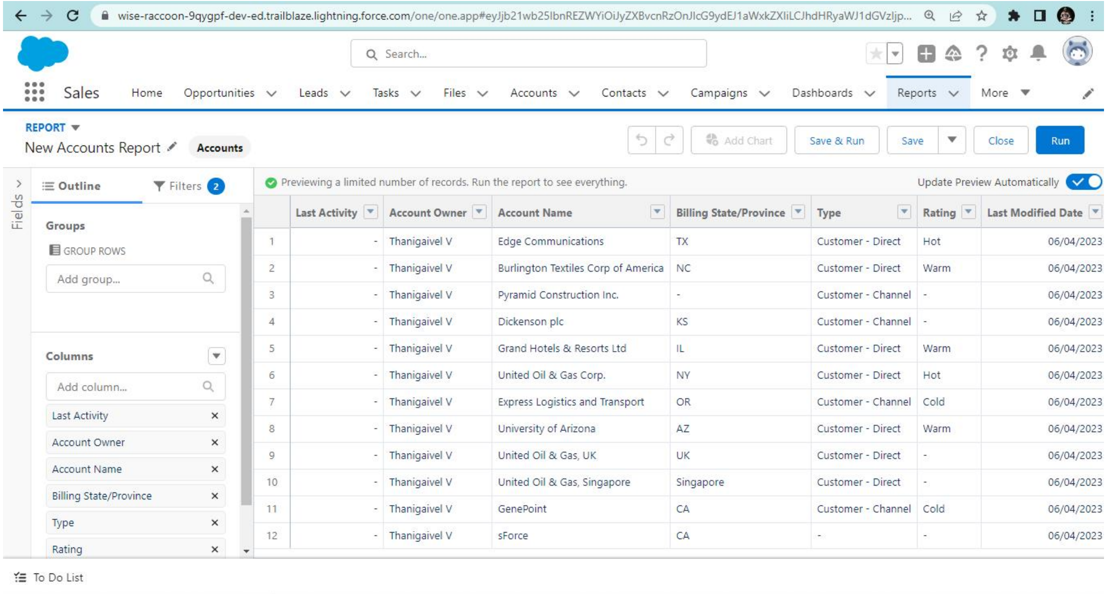
Reports:

1. From the Reports tab, click New Report.



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

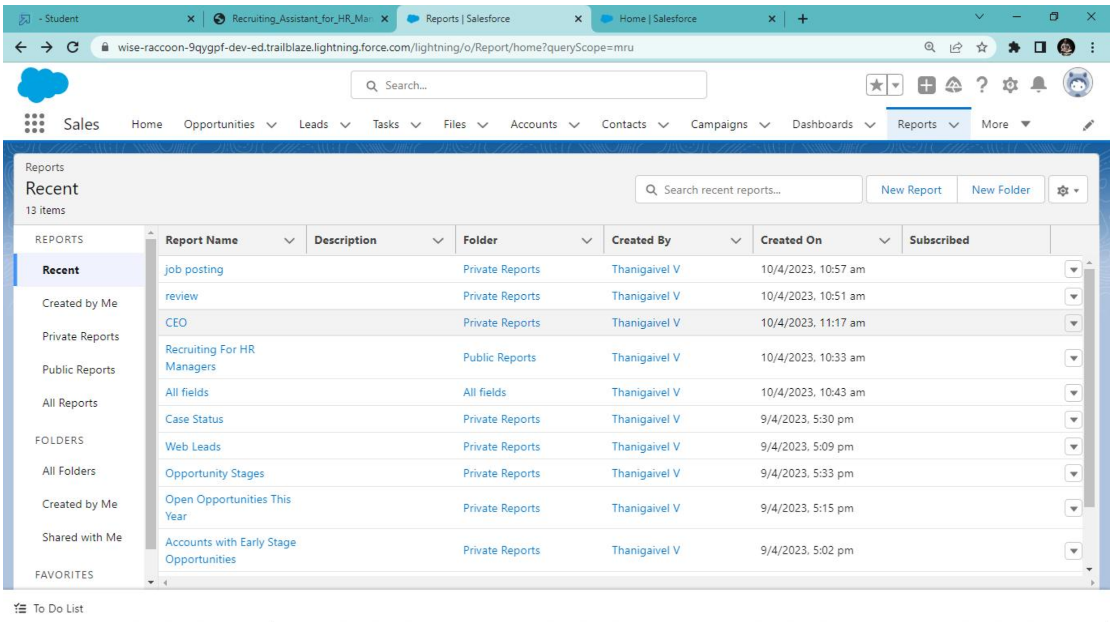




3. Customize your report accordingly and include all fields, then save or run it

Activity-2

Create a report for review and Job Posting Objects.



Thank you