

PROJECT REPORT TEMPLATE

1. INTRODUCTION

1.1 OVERVIEW

CREATE A CRM APPLICATION WHICH HELPS THE APPLICANT TO TRACK THE NUMBER OF JOBS HE APPLIED AND HELPS HIM TO FIND THE JOB POSTED BY THE VARIOUS RECRUITERS, FIND THE BEST ATTRIBUTES TO BE INVOLVED TO BE INVOLVED.

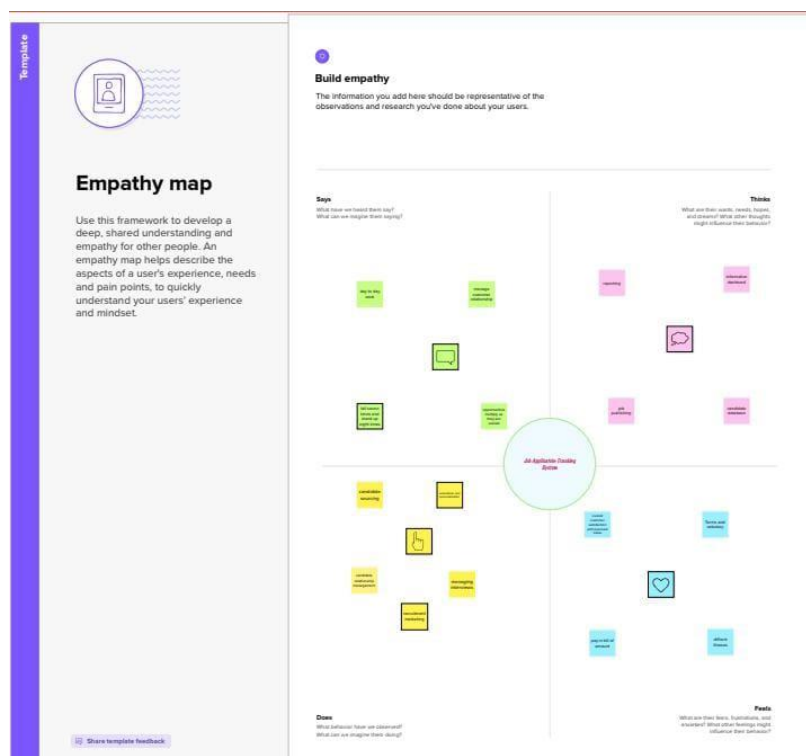
1.2 PURPOSE

ARE YOU NEW TO SALESFORCE? NOT SURE EXACTLY WHAT IT IS, OR HOW TO USE IT? DON'T KNOW WHERE YOU SHOULD START ON YOUR LEARNING JOURNEY? IF YOU'VE ANSWERED YES TO ANY OF THESE QUESTIONS, THEN YOU'RE IN THE RIGHT PLACE. THIS MODULE IS FOR YOU.

WELCOME TO SALESFORCE! SALESFORCE IS GAME-CHANGING TECHNOLOGY, WITH A HOST OF PRODUCTIVITY -BOOSTING FEATURES, THAT WILL HELP YOU SELL SMARTER AND FASTER. AS YOU WORK TOWARD YOUR BADGE FOR THIS MODULE, WILL TAKE YOU THROUGH THESE FEATURES AND ANSWER THE QUESTION, "WHAT IS SALESFORCE, ANYWAY?"

2. PROBLEM DEFINITION & DESIGN THINKING

EMPATHY MAP



2.2 IDEATION & BRAINSTORMING MAP



3. RESULT

3.1 DATA MODEL

OBJECT NAME	FIELDS IN THE OBJECT	
OBJ 1	FIELD LABEL	DATA TYPE
	CREATED BY	LOOKUP (USER)
	LAST MODIFIED BY	LOOK UP (USER)
	OWNER	LOOKUP (USER, GROUP)
	RECRUITER NUMBER	AUTO NUMBER
OBJ 2	FIELD LABEL	DATA TYPE
	CREATED BY	LOOKUP (USER)
	JOBS NUMBER	AUTO NUMBER
	LAST MODIFIED BY	LOOKUP (USER)
	OWNER	LOOKUP (USER, GROUP)

3.2 ACTIVITY & SCREENSHOT

Creating a Salesforce Developer Org:

A DEVELOPER ORG HAS ALL THE FEATURES AND LICENSES YOU NEED TO GET STARTED WITH SALESFORCE.

1. SEARCH DEVELOPER.SALESFORCE.COM

2. ENTER THE FOLLOWING DETAILS LIKE FIRST NAME, LAST NAME, EMAIL, ROLE, COMPANY, COUNTRY/REGION, POSTAL CODE, AND USERNAME MUST BE UNIQUE.

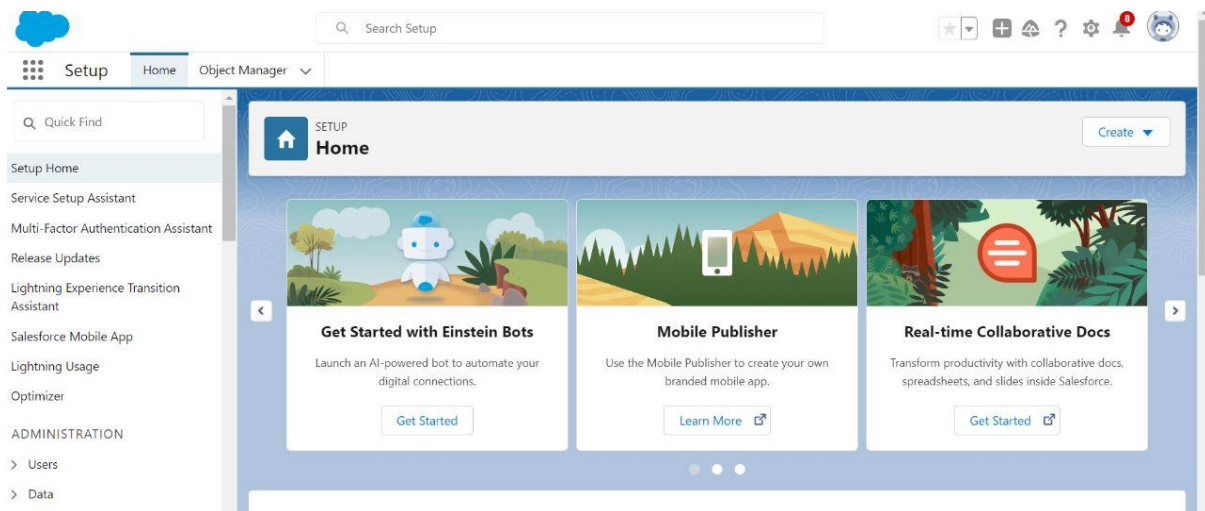
3. CLICK SIGN ME UP, AFTER A FEW MINS YOU WILL RESERVE A MAIL SALESFORCE ORG AND BY USING THE VERIFY ACCOUNT LINK YOU CAN CREATE YOUR NEW PASSWORD.

4. CLICK SAVE.

5. SEARCH LOGIN.SALESFORCE.COM

6. BY USING USERNAME AND PASSWORD YOU CAN INTO THE SALESFORCE ORG.

THE SETUP PAGE WILL APPEAR AS BELOW.



MILESTONE 2-OBJECT:

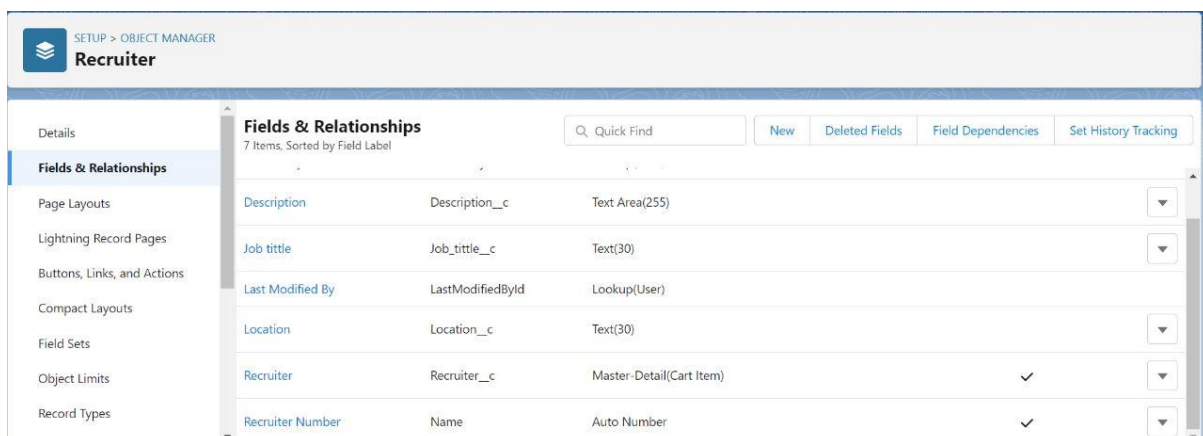
ACTIVITY 1:

CREATE A CUSTOM OBJECT FOR RECRUITER:

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 LABELS AS “RECRUITER”.
4. FILL IN THE PLURAL LABEL AS “RECRUITER”.
5. RECORD NAME: “RERECRUITER NUMBER”.
6. SELECT THE DATA TYPE AS “AUTO NUMBER”.
7. UNDER DISPLAY FORMAT ENTER “REC –{0000}”.
8. ENTER STARTING NUMBER AS 1.
9. IN THE OPTIONAL FEATURES SECTION, SELECT ALL 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 3- FIELDS:

ACTIVITY 1:

CREATE THE CUSTOM FIELDS:

1. CLICK THE OBJECT MANAGER TAB, SELECT THE OBJECT FOR WHICH YOU HAVE TO CREATE THE FIELDS AND RELATIONSHIPS.
2. FROM THE SIDEBAR, CLICK FIELDS & RELATIONSHIPS. NOTICE THAT THERE ARE ALREADY SOME FIELDS THERE. THOSE ARE THE STANDARD FIELDS.
3. CLICK NEW TO CREATE A CUSTOM FIELD. TIP: BEFORE CREATING A NEW FIELD, DO A QUICK SEARCH TO MAKE SURE A SIMILAR ONE DOESN'T ALREADY EXIST.

4. CLICK ON THE NEW TO CREATE A FIELD.
5. CHOOSE THE DATA TYPE AS A TEXT, CLICK NEXT
6. ENTER FIELD LABEL, LENGTH AND NAME AND CLICK NEXT.
7. SELECT THE PROFILES TO WHICH YOU WANT TO GRANT EDIT ACCESS TO THIS FIELD VIA FIELD-LEVEL SECURITY. THE FIELD WILL BE HIDDEN FROM ALL PROFILES IF YOU DO NOT ADD IT TO FIELD-LEVEL SECURITY. CLICK NEXT.
8. SELECT THE PAGE LAYOUTS THAT SHOULD INCLUDE THIS FIELD.
9. CLICK SAVE.

SETUP > OBJECT MANAGER
Recruiter

Fields & Relationships
7 Items, Sorted by Field Label

Q Quick Find [New](#) [Deleted Fields](#) [Field Dependencies](#) [Set History Tracking](#)

Field Label	Field Name	Data Type	Relationship	Required	Actions
Description	Description__c	Text Area(255)			▼
Job title	Job_title__c	Text(30)			▼
Last Modified By	LastModifiedById	Lookup(User)			
Location	Location__c	Text(30)			▼
Recruiter	Recruiter__c	Master-Detail(Cart Item)	✓		▼
Recruiter Number	Name	Auto Number	✓		▼

ACTIVITY 2:

CREATION OF MASTER-DETAIL RELATIONSHIP:

1. FROM SETUP, GO TO OBJECT MANAGER
2. ON THE SIDEBAR, CLICK FIELDS & RELATIONSHIPS.
3. CLICK NEW.
4. CHOOSE MASTER-DETAILS RELATIONSHIP AND CLICK NEXT
5. CHOOSE THE RELATED OBJECT AND SELECT THAT OBJECT.
6. ENTER THE LABEL AND NAME FOR THE LOOKUP FIELD
7. CLICK NEXT, NEXT AND SAVE

SETUP > OBJECT MANAGER

Jobs

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

Jobs

New Relationship

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

Step 3 of 6

Field Label: Recruiter

Field Name: Recruiter

Description:

Help Text:

Child Relationship Name: Jobs

Sharing Setting: ☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records. ☒ Read/Write: Allows users with at least Read/Write 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.

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity.

Lookup Filter

ACTIVITY 3:

CREATE A NEW CUSTOM FILED:

1. FROM SETUP, GO TO OBJECT MANAGER
2. ON THE SIDEBAR, CLICK FIELDS & RELATIONSHIPS.
3. CLICK NEW.
4. CHOOSE THE DATA TYPE TEXT AREA CLICK NEXT
5. ENTER THE FIELD LABEL AND FIELD NAME CLICK NEXT
6. CLICK NEXT AND SAVE.

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Jobs

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

Jobs

New Custom Field

Step 2. Enter the details

Step 2 of 4

Field Label: Description

Field Name: Description

Description:

Help Text:

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

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity.

Default Value: Show Formula Editor

Use formulas to create, update, or delete record values. Enclose text and picklist value API names in double quotes. "The Name". Include numbers without quotes. 123. Whole percentages as decimals. 0.10, and express date calculations in the standard format: Today() - 7. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__cmetRecord.PickName_Field__c

ACTIVITY 4:

CREATE A NEW CUSTOM FIELD:

1. FROM THE SETUP, GO TO OBJECT MANAGER
2. ON THE SIDEBAR, CLICK FIELDS & RELATIONSHIPS.
3. CLICK NEW.
4. CHOOSE THE DATA TYPE TEXT CLICK NEXT.
5. ENTER THE FIELD LABEL AND FIELD NAME CLICK NEXT
6. CLICK NEXT AND SAVE.

The screenshot shows the Salesforce 'New Custom Field' setup page. The sidebar on the left lists various setup options, with 'Fields & Relationships' selected. The main form contains fields for 'Field Label' (Location), 'Length' (30), 'Field Name' (Location), 'Description', and 'Help Text'. There are checkboxes for 'Required', 'Unique', and 'External ID'. The 'Default Value' field is empty, and a 'Show Formula Editor' link is visible at the bottom.

MILESTONE 4-TAB:

ACTIVITY 1 :

CREATE A TAB :

1. CLICK SETUP
2. SEARCH TAB IN QUICK BOX THEN, SELECT TAB
3. CLICK NEW CUSTOM OBJECT TAB SECTION
4. SELECT THE CREATED OBJECT RECRUITER AND TAB STYLE FOR THE NEW CUSTOM TAB.
5. SELECT THE PROFILES THAT VISIBLE IN THE TAB.

6. CLICK ON CUSTOM APPS TO MAKE VISIBLE.

7. CLICK SAVE.

SETUP
Tabs

Custom Tabs

[Help for this Page](#)

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs [New](#) [What Is This?](#)

Action	Label	Tab Style	Description
Edit Del	Recruiters	Globe	

Web Tabs [New](#) [What Is This?](#)

No Web Tabs have been defined

MILESTONE 5- PROFILE:

ACTIVITY 1:

CREATE A CUSTOM PROFILE:

1. FROM SETUP, ENTER PROFILES IN QUICK FIND BOX
2. SELECT PROFILES.
3. CLICK CLONE
4. FOR PROFILE, ENTER RECRUITER.
5. CLICK SAVE.

Profiles

Step 1. Enter View Name ! = Required

View Name

Created By [lakshmi R](#), 28/03/2023, 2:26 pm

Last Modified By [lakshmi R](#), 28/03/2023, 2:26 pm

Step 2. Specify Filter Criteria [Clear All Rows](#)

Setting	Operator	Value
<input type="text"/>	equals	<input type="text"/>

[Add Row](#)

Examples

- Modify All Data equals False
- Contact: Modify All equals True

Step 3. Select Columns to Display

MILESTONE 6-USER

ACTIVITY 1:

TO CREATE A USER:

1. FROM SETUP, ENTER USERS IN THE QUICK FIND BOX, THEN SELECT USERS.
2. CLICK NEW USER.
3. ENTER FIRST NAME AS Hr AND LAST NAME AS MANAGER.
4. ENTER THE USER'S NAME AND EMAIL ADDRESS AND A UNIQUE USERNAME IN THE FORM OF AN EMAIL ADDRESS. BY DEFAULT, THE USERNAME IS THE SAME AS THE EMAIL ADDRESS.
5. THEN CREATE A NEW ROLE Hr MANAGER.
6. SELECT USER LICENSE AS STANDARD PLATFORM USER.
7. SELECT PROFILE.
8. CLICK SAVE.

The screenshot displays the Salesforce Setup interface. On the left, the 'Setup' menu is visible with options like 'Home', 'Object Manager', and 'Users'. The 'Users' section is expanded, showing a list of users. The 'New User' form is open, showing the 'General Information' tab. The form fields are as follows:

Field	Value
First Name	Hr
Last Name	Manager
Alias	hmana
Email	varaprasadandrothu@gmail.com
Username	Hrmanager@example.com
Nickname	User167446303932035136
Title	
Company	
Department	
Division	
Role	<None Specified>
User License	Salesforce Platform
Profile	Standard Platform User
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"/>
Data.com User Type	--None--
Data.com Monthly Addition Limit	Default Limit (300)
Accessibility Mode (Classic Only)	<input type="checkbox"/>

MILESTONE 7-SHARING RULES

ACTIVITY 1:

CREATE A SHARING RULE

1. GO TO SHARING SETTINGS, WHICH CAN BE FOUND UNDER THE QUICK FIND SECTION.
2. SCROLL DOWN AND FIND THE CANDIDATE OBJECT WHERE A SHARING RULE NEEDS TO BE ADDED, AND THEN CLICK ON NEW TO CREATE A NEW SHARING RULE.
3. ADD THE LABEL OF THE SHARING RULE YOU WANT TO MAKE.
4. SELECT YOUR RULE TYPE BASED ON THE CRITERIA.
5. SELECT THE FIELD CAN JOIN IMMEDIATELY CHECK FILED FROM THE CANDIDATE OBJECT.
6. SELECT THE OPERATOR AS EQUAL AND VALUE IS TRUE.
7. AND IN SELECTING THE USERS TO SHARE WITH THE SECTION ROLES AND IN THAT SELECT Hr MANAGER.
8. AND IN THE SECTION OF SELECT THE LEVEL OF ACCESS FOR THE USERS GIVE THE ACCESS READ/WRITE.
9. AND SAVE THE RULE.

user

users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

SETUP

Users

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 (10+) | User Provisioning Accounts (0)

User Detail

Edit Sharing Change Password

Name	lakshmi R	Role	
Alias	IR	User License	Salesforce
Email	rameshlakshmi374@gmail.com	Profile	System Administrator
Username	rameshlakshmi374@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16799938006444012145	Marketing User	<input checked="" type="checkbox"/>
Title		Offline User	<input checked="" type="checkbox"/>
Company	puratchi thalaivar Dr. M.G.R govt arts and science college	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input checked="" type="checkbox"/>

MILESTONE 8-REPORTS:

ACTIVITY 1:

CREATE A REPORT:

CREATE A REPORT THAT DISPLAYS RATING OF THE ACCOUNT AND WHICH HAS TYPE AND ACCOUNT NAME.

1. CLICK ON APP LAUNCHER SEARCH FOR REPORTS.
2. CLICK ON THE NEW REPORT AND SELECT THE CATEGORY HAS ACCOUNTS AND CONTACTS.
3. AND THE REPORT TYPE HAS ACCOUNTS.
4. IN THE DETAILS SECTION SELECT THE OPTION START REPORT.
5. IN THE FILTER PANE SELECT ALL THE ACCOUNTS TO SHOW ME.
6. AND ALL TIME IS CREATED.
7. IN THE OUTLINE PANE, GROUP ROWS SELECT RATING AND IN GROUP COLUMNS SELECT ACCOUNT NAME.
8. IN THE COLUMNS SECTON ADD TYPE AND BILLING CITY.
9. SAVE THE REPORT BY GIVING LABEL NAME AND SAVE THE FOLDER AS A PUBLIC FOLDER AND SAVE THE REPORT.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Lakshmi		Public Reports	lakshmi R	28/3/2023, 7:36 pm	

4. TRAIHEAD PUBLIC PROFILE PUBLIC URL

TEAM LEADER – <https://trailblazer.me/id>

TEAM MEMBER 1- <https://trailblazer.me/id/laksr21>

TEAM MEMBER 2- <https://trailblazer.me/id/ssrivinya>

TEAM MEMBER 3- <https://trailblazer.me/id/thilaga2003>

5. ADVANTAGES & DISADVANTAGE

ADVANTAGES

- ✓ IT IS USED TO DETERMINE THE BEST CANDIDATE TO FILL A SPECIFIC ROLE WITH IN THE COMPANY.

- ✓ A GOOD JOB SEARCH BEGINS WITH SUFFICIENT PLANNING AND OVER ALL KNOWLEDGE OF THE RECRUITMENT PROCESS.
- ✓ TRACKER TOOLS MAKE IT EASIER TO REACH POTENTIAL EMPLOYERS.
- ✓ FLEXIBLE SYSTEM FOR BOTH EMPLOYERS AND THE AGENCY.
- ✓ IMPROVED CANDIDATE EXPERIENCE.
- ✓ EASY INTERVIEW SCHEDULING.

DISADVANTAGES

- ✓ A DISADVANTAGE OF ATS IS MISSING QUALIFIED APPLICANTS DUE TO WRONG KEYWORD SELECTION.
- ✓ AUTOMATIC ELIMINATION OF RESUMES THAT SOFTWARE CANNOT RECGNIZE AND INTERPRET IS ANOTHER DRAWBACK OF ATS.
- ✓ AN APPLICANT TRACKING SYSTEM DISADVANTAGE IS THAT THEY ARE OPEN TO MANIPULATION.

6. APPLICATION

AN JOB APPLICATION TRACKING SYSTEM CREATES OPPORTUNITIES TO AUTOMATE MANUAL PROCESSES, INCREASE VISIBILITY INTO THE

HIRING CYCLE FOR THE ENTIRE RECRUITING TEAM, AND INCREASE OPPORTUNITES FOR COMMUNICATION THROUGHOUT THE CANDIDATE JOURNEY. 78%

OF RECRUTEERS USING AN ATS REPORT THAT IT HAS IMPROVED THE QUALITY OF THE CANDIDATES THEY HIRE.

7. CONCLUSION

APPLICATION TRACKING SYSTEM FOR THE RECRUITERS IS A VERY EFFECTIVE HIRING SOLUTION THAT MOST OF THE SUCCESFUL RECRUITERS UTILIZE.

8. FUTURE SCOPE

ACCORDING TO A RECENTLY RELEASED SURVEY REPORT, THE MAJORITY OF STAFFING FIRMS WORLDWIDE WILL OPT FOR AN APPLICANT TRACKING SYSTEM BY THE END FOF 2023 TO IMPROVE THE OVERALL TALENT ADQUISITION EFFICACY, IN THIS SCOPE THE FUTURE OF ATS DEFINITELY LOOK BRIGHT.

END