



RECRUITING ASSISTANT FOR HR MANAGERS

Project Based Experiential Learning Program

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.

<https://trailhead.salesforce.com/content/learn/projects/build-a-data-model-for-a-recruiting-app>

Milestone 1: Creation of developer account

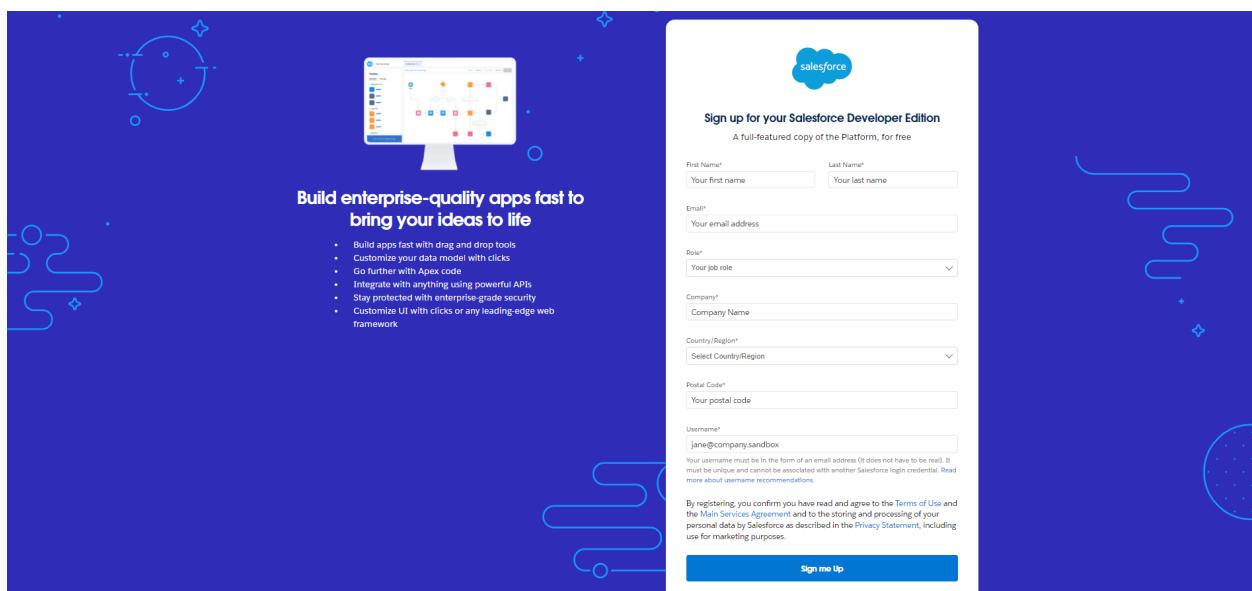
Create your Salesforce Developer Org to get Started

In order to start with this project you need to have a free salesforce developer account.

Activity-1

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

1. Search Developer.salesforce.com

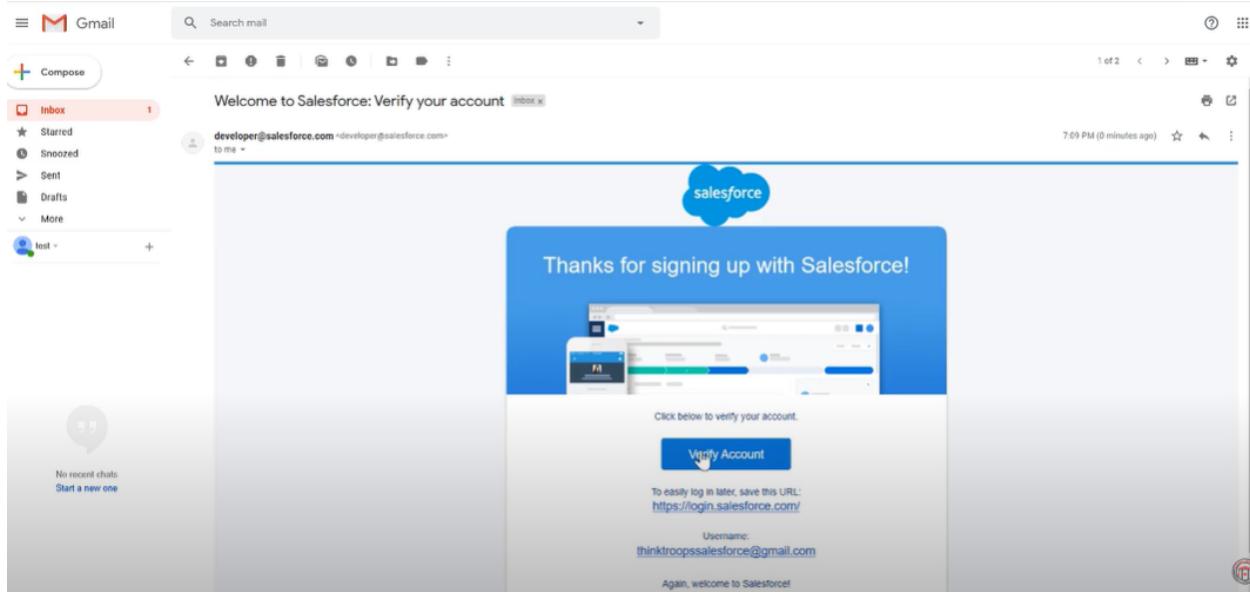


2. Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.

3. Click sign me up, After a few min 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.



login.salesforce.com

Google Salesforce intern w... Trailhead | The fun... Salesforce Team Int... Login | Salesforce YouTube Gmail New chat Profile | Mynaukri V. V Varaprasad And... Candidate Home V the Techee – V th...

The screenshot shows the Salesforce login page. A red arrow points to the login form area, which includes fields for 'Username' and 'Password', a 'Log In' button, and a 'Remember me' checkbox. To the right of the login form, there is a promotional banner for the 'Net Zero Marketplace' with the text 'Drive positive climate impact with Net Zero Marketplace.' and a 'EXPLORE THE MARKETPLACE' button. Below the login form, there are links for 'Forgot Your Password?' and 'Use Custom Domain'. At the bottom, there are links for 'Not a customer?' and 'Try for Free', along with copyright information: '© 2023 salesforce.com, inc. All rights reserved. | Privacy'.

The setup page will appear as below.

The screenshot shows the Salesforce Setup Home page. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. Under 'Setup', there are links for 'Quick Find', 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'New Salesforce Mobile App QuickStart', 'Lightning Usage', 'Optimizer', 'ADMINISTRATION', 'Users', 'Data', 'Email', 'PLATFORM TOOLS', 'Subscription Management', 'Apps', and 'Feature Settings'. The main content area features three cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections), 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app), and 'Real-time Collaborative Docs' (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). Below these cards is a section titled 'Most Recently Used' with a table showing 10 items: 'Job posting site' (NAME), 'Custom Field Definition' (TYPE), and 'Job Posting' (OBJECT). There is also a 'Create' button in the top right corner of the main content area.

Create a developer org and login with your login credentials.

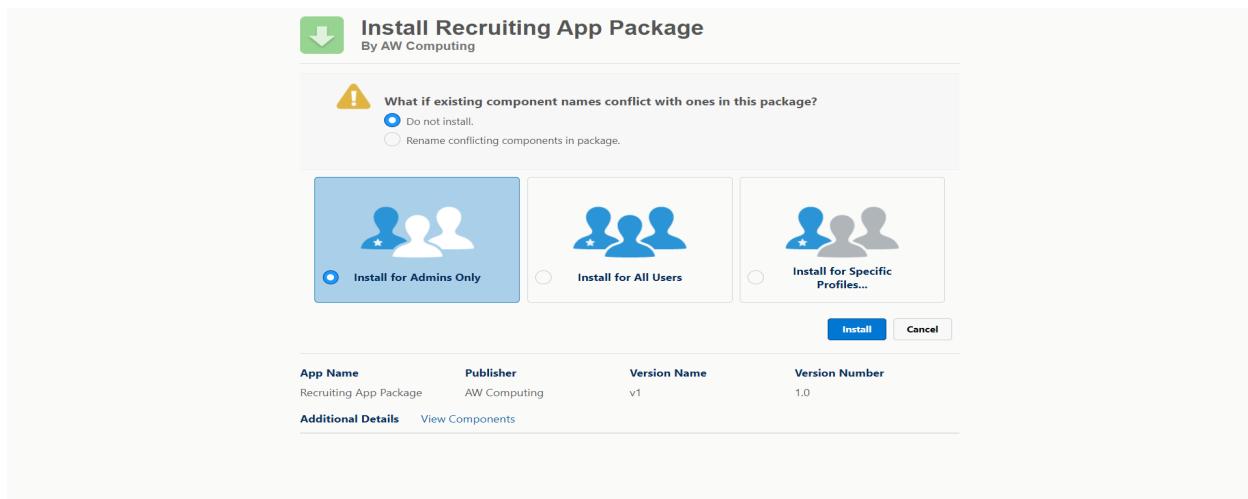
Milestone 2 : Package installation

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:

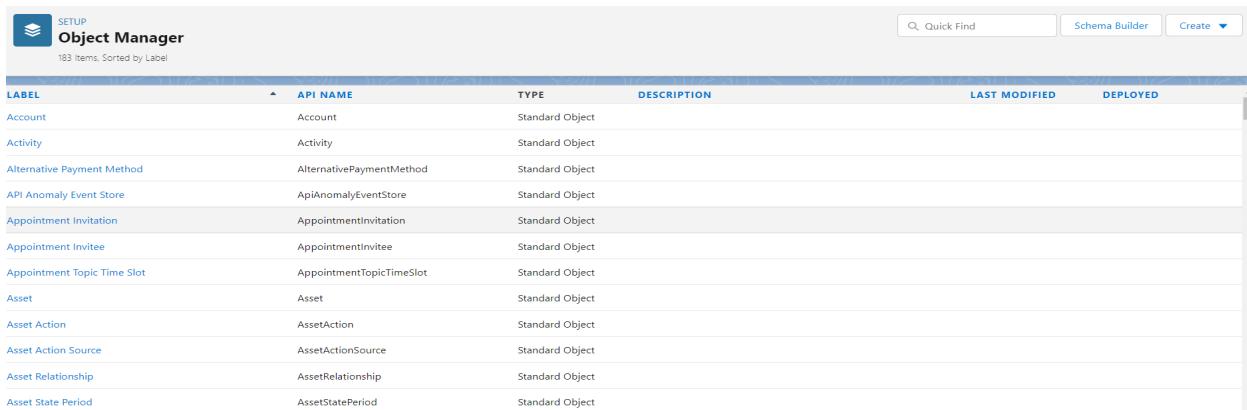
- Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Activity-1

Create a custom object for Job Posting Sites

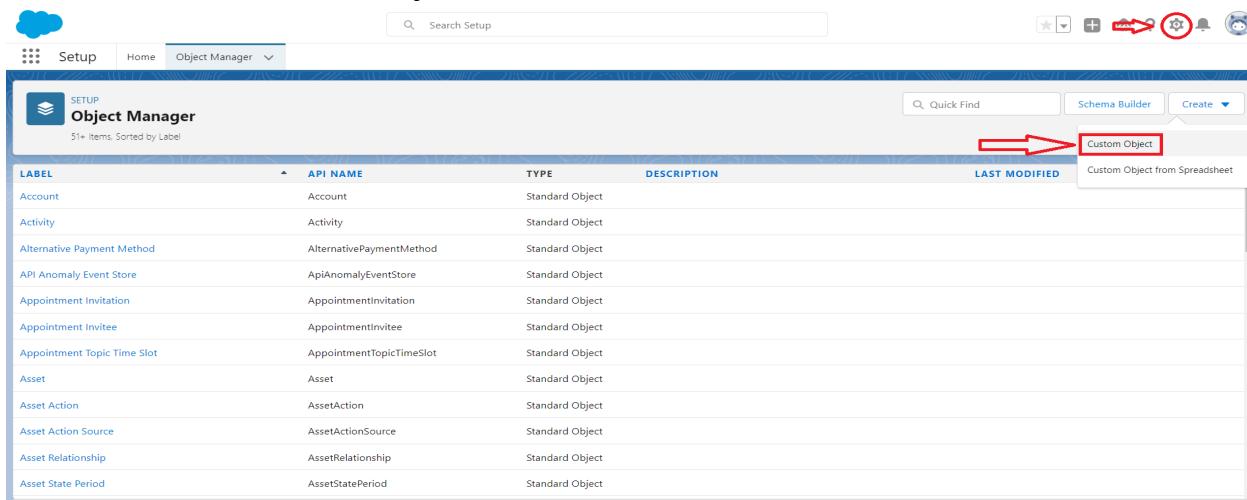
To create a custom object, follow these steps :

1. From setup click on object manager.



The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for 'SETUP' and 'Object Manager'. Below the tabs, it says '183 items. Sorted by Label'. On the right side, there are buttons for 'Quick Find', 'Schema Builder', and 'Create'. The main area is a table with columns: 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The table lists various standard objects like Account, Activity, Alternative Payment Method, etc. The 'Create' button is highlighted with a red circle.

2. Click create, select custom object.



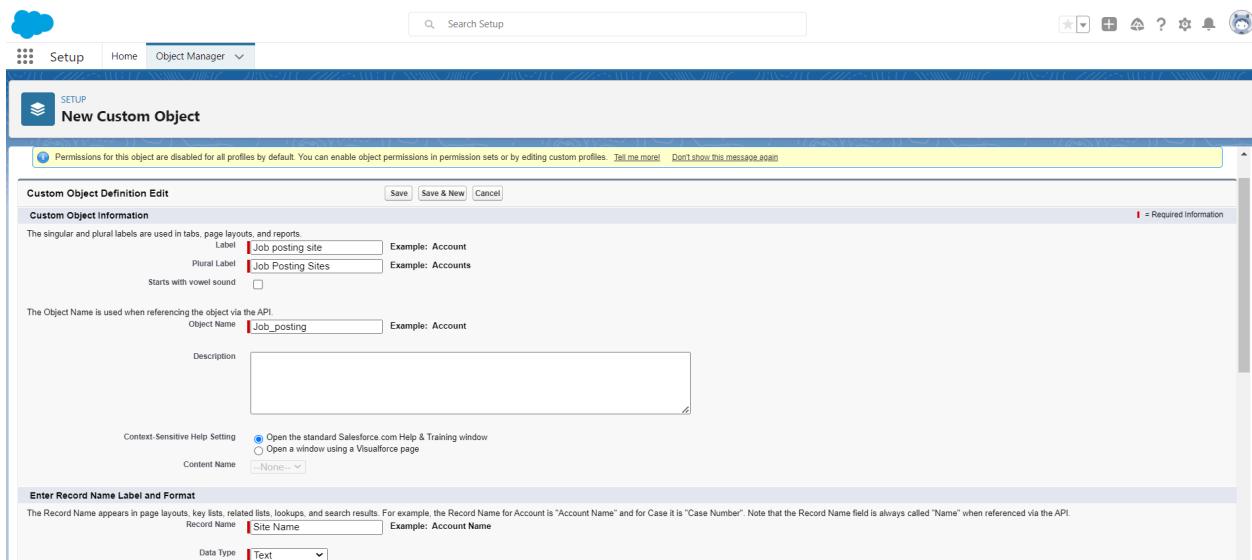
The screenshot shows the same Salesforce Object Manager interface after creating a new custom object. The 'Create' button is now highlighted with a red arrow pointing to it. The table still lists standard objects, but the 'Create' button is now clearly visible and highlighted.

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



Custom Object Definition Edit

Custom Object Information

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

Label	Job posting site	Example: Account
Plural Label	Job Posting Sites	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

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

Object Name	Job_posting	Example: Account
-------------	-------------	------------------

Description

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name

None

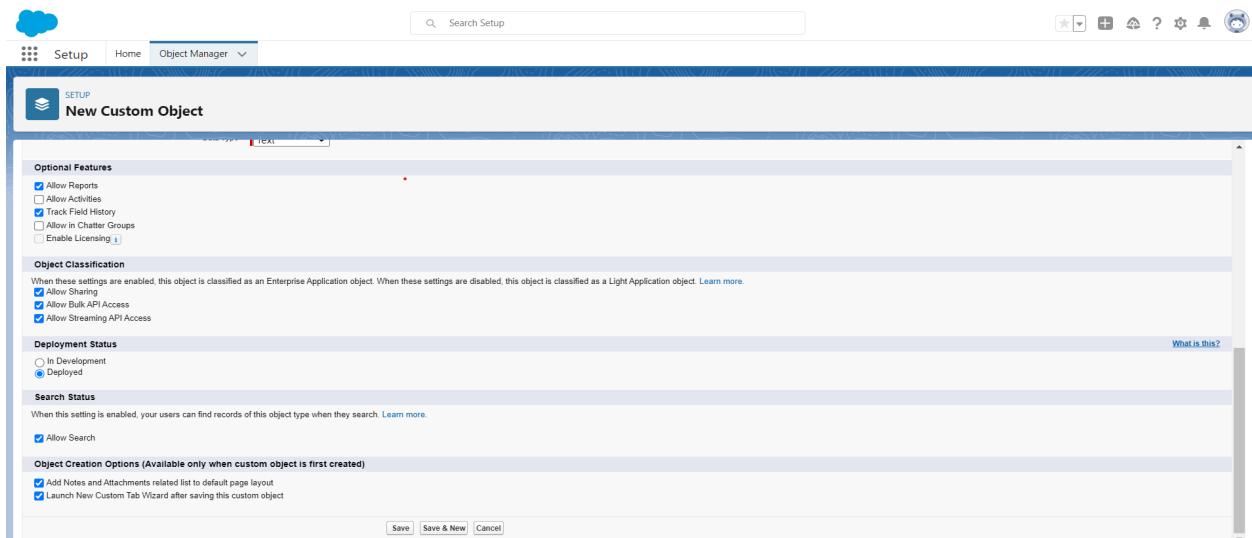
Enter Record Name Label and Format

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

Record Name	Site Name	Example: Account Name
-------------	-----------	-----------------------

Data Type

Text



Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Enable in Chatter Groups
- Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

- In Development
- Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

- Allow Search

Object Creation Options (Available only when custom object is first created)

- 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?

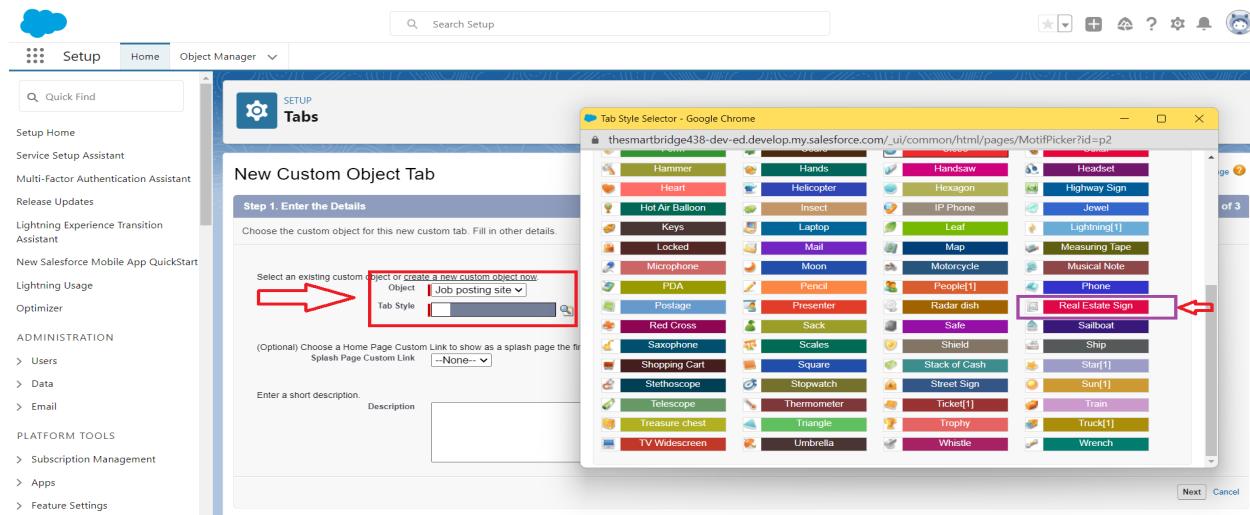
In Salesforce, a tab is a user interface element that allows users to navigate to different sections of the platform, such as Accounts, Contacts, Leads, and Opportunities. Tabs can also be used to access custom objects and custom pages. They are typically located at the top of the screen and can be customized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

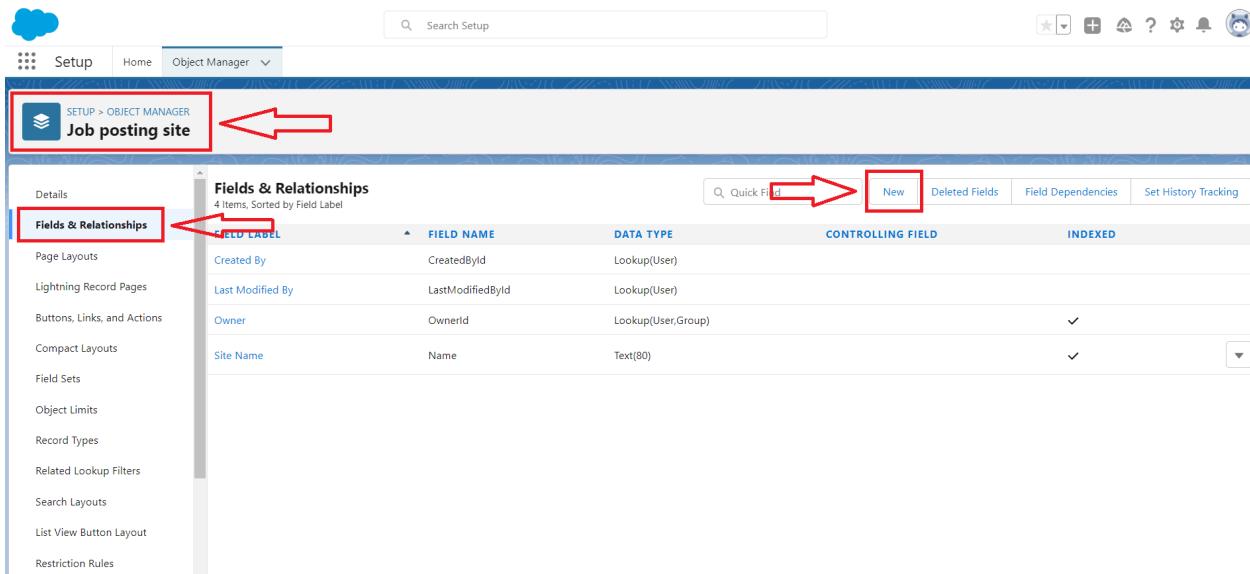
- Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present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



Setup > OBJECT MANAGER
Job posting site

Fields & Relationships

Details

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

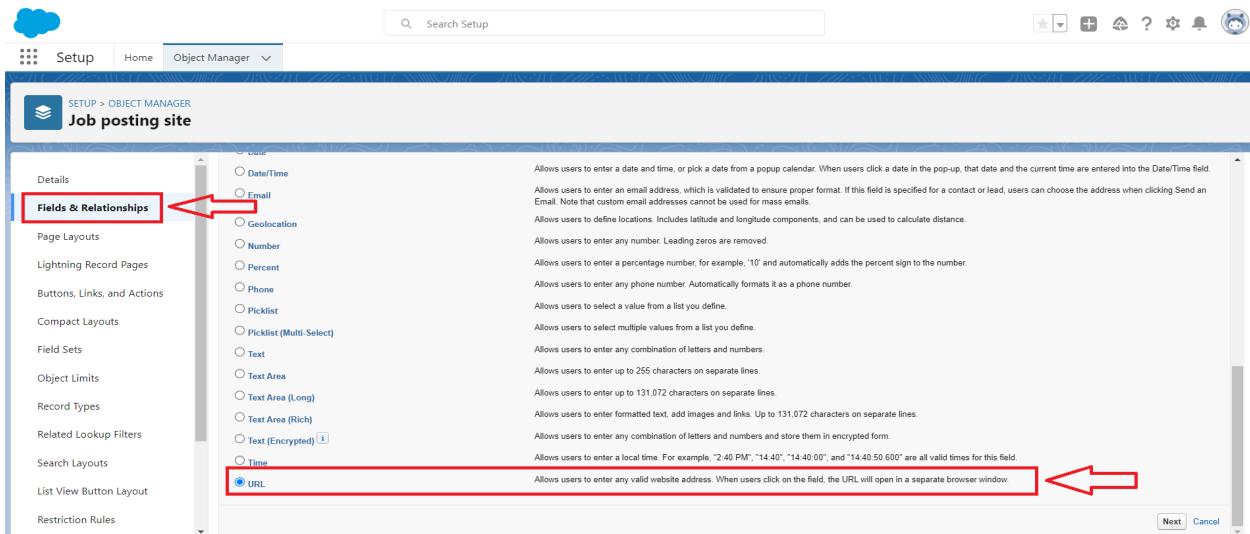
Fields & Relationships

FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED

Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	✓
Site Name	Name	Text(80)	✓

Quick Find New Deleted Fields Field Dependencies Set History Tracking

2. Select the data type as URL.



Setup > OBJECT MANAGER
Job posting site

Details

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

Fields & Relationships

Date/Time

Email

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted)

Time

URL

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define location. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

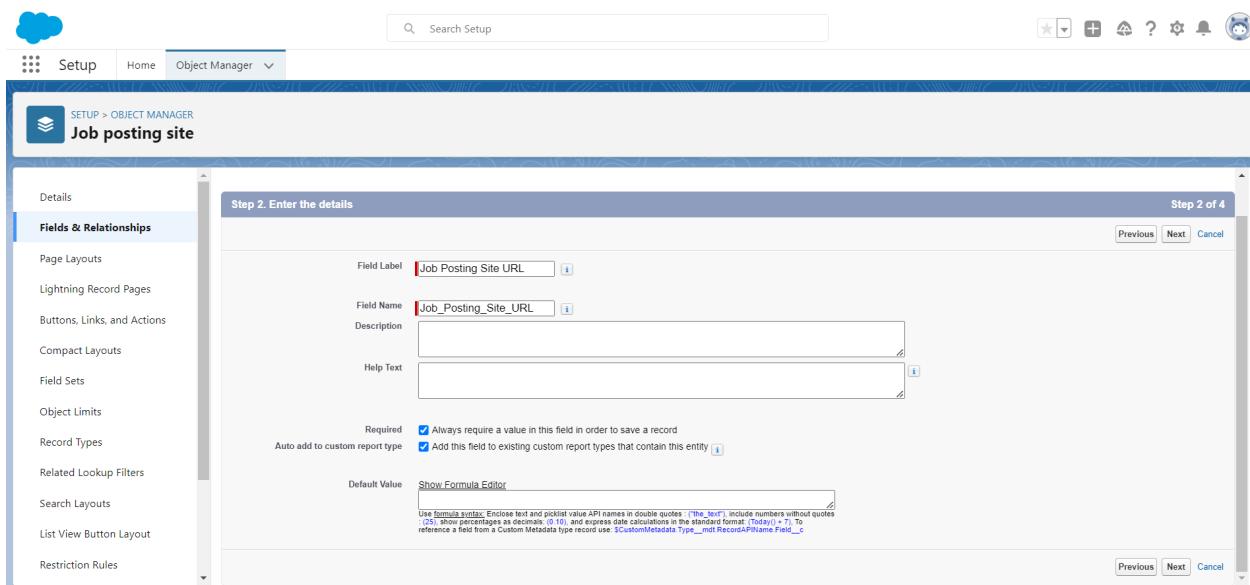
Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40:00', and '14:40:50.600' are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

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

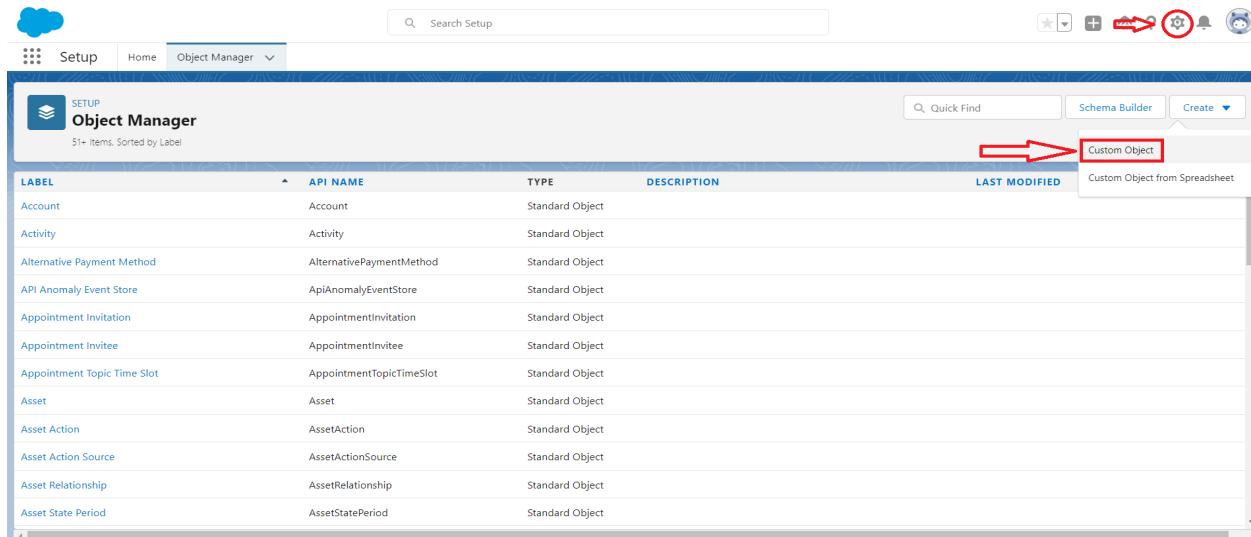
What is a Junction Object?

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

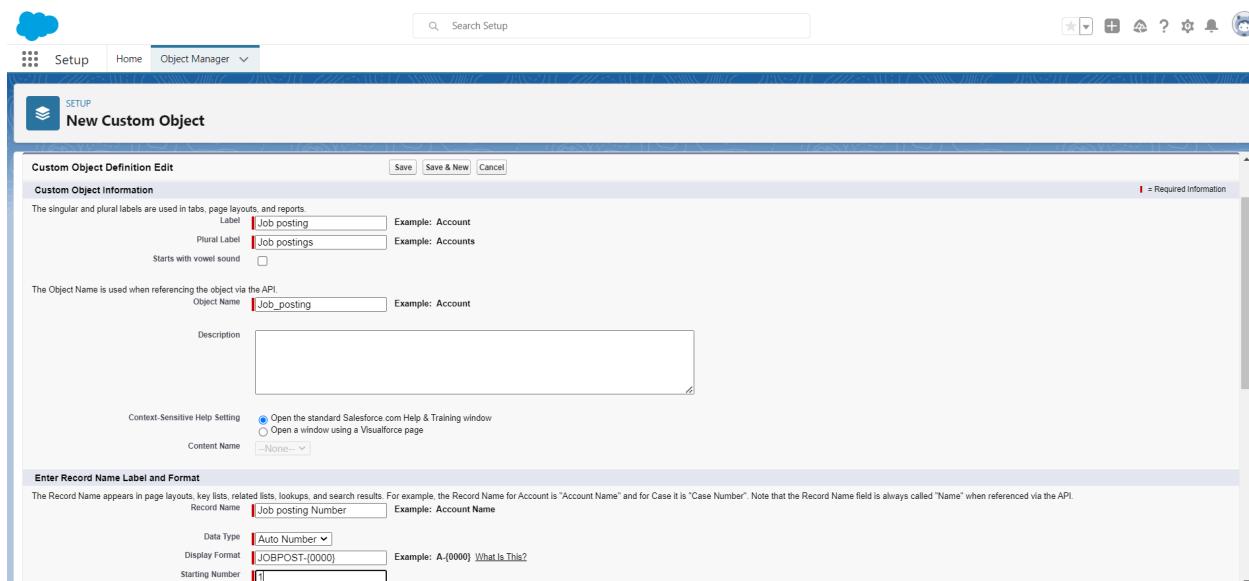
Creating a custom junction object :

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



The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar and a toolbar with various icons. Below the toolbar, the title 'Object Manager' is displayed. A red arrow points to the 'Custom Object' button in the top right corner of the main content area. The main area lists various standard objects like Account, Activity, and Asset, along with their API names, types, descriptions, and last modified dates. The 'Custom Object' button is located at the bottom right of this list.

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 'New Custom Object' definition edit page. At the top, there's a header with tabs for 'Custom Object Definition Edit' and buttons for 'Save', 'Save & New', and 'Cancel'. A red arrow points to the 'Record Name' field, which contains 'Job posting Number'. The page includes sections for 'Custom Object Information' (Label: Job posting, Plural Label: Job postings, Starts with vowel sound: unchecked), 'Object Name' (Object Name: Job_posting), 'Description' (empty text area), 'Context-Sensitive Help Setting' (radio buttons for opening the standard help window or a Visualforce page), and 'Content Name' (dropdown menu set to 'None'). At the bottom, there's a section for 'Enter Record Name Label and Format' with fields for 'Record Name' (Job posting Number), 'Data Type' (Auto Number), 'Display Format' (JOBPOST-{0000}), and 'Starting Number' (1).



A screenshot of the Salesforce Setup interface. At the top, there's a navigation bar with icons for Setup, Home, and Object Manager. A search bar says "Search Setup". On the right, there are various system status icons. The main content area is titled "SETUP New Custom Object". It contains several sections: "Optional Features" (checkboxes for Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, and Enable Licensing), "Object Classification" (checkboxes for Allow Sharing, Allow Bulk API Access, and Allow Streaming API Access, with a note that it classifies as an Enterprise Application object if enabled), "Deployment Status" (radio buttons for In Development and Deployed, with "Deployed" selected), "Search Status" (checkbox for Allow Search, which is unchecked), "Object Creation Options" (checkboxes for Add Notes and Attachments related list to default page layout and Launch New Custom Tab Wizard after saving this custom object, both unchecked), and finally a row of buttons at the bottom: Save, Save & New, and Cancel.

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

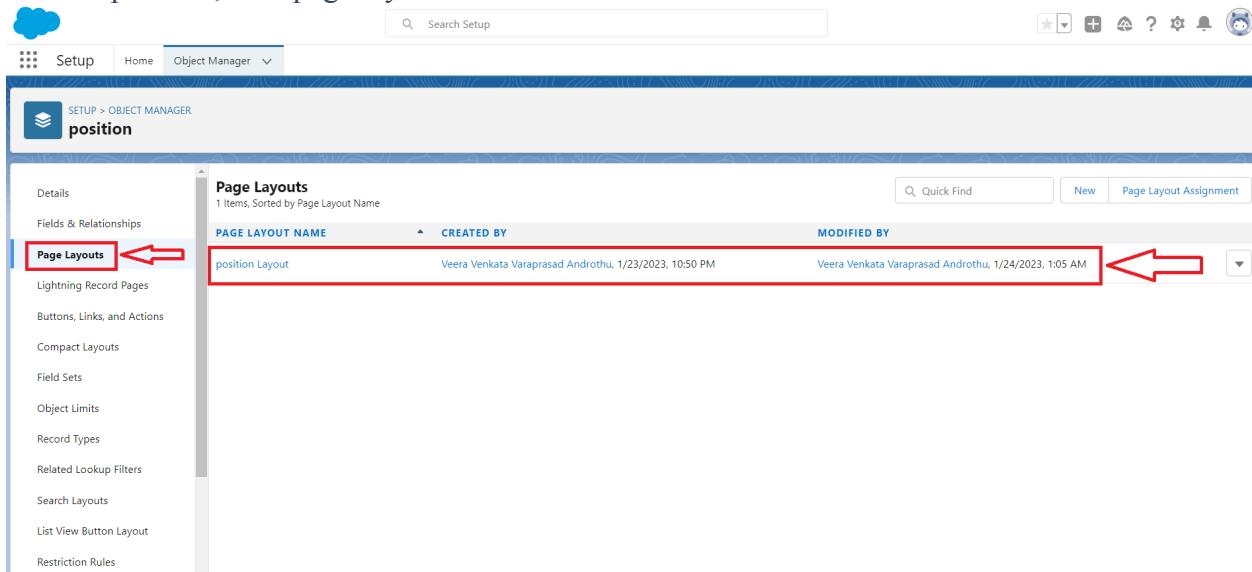
What is Page Layout?

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

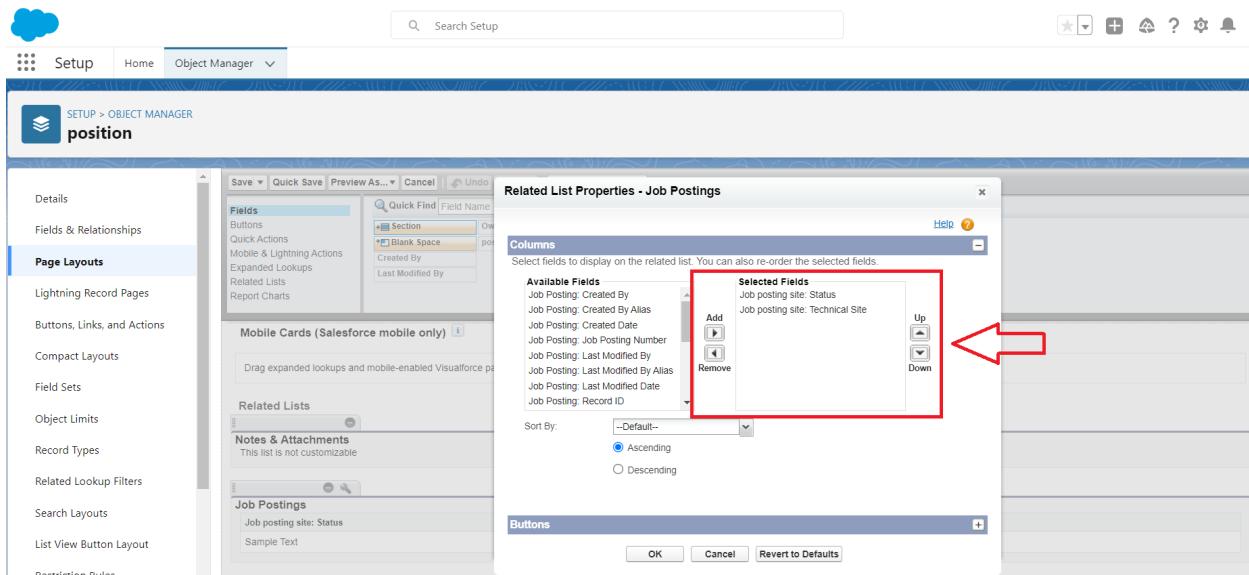
Modifying the page layouts :

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



PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
position Layout	Veera Venkata Varaprasad Androthu, 1/23/2023, 10:50 PM	Veera Venkata Varaprasad Androthu, 1/24/2023, 1:05 AM

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, select
 - Job posting site : Status
 - Job posting site : Technical Site
6. Click add.
7. From the selected fields section, select job posting : Job posting number and click remove.



8. Click ok, then save.

Activity-2

Create a Page layout for Review Object

Milestone 8 : Validation Rules

What are Validation Rules?

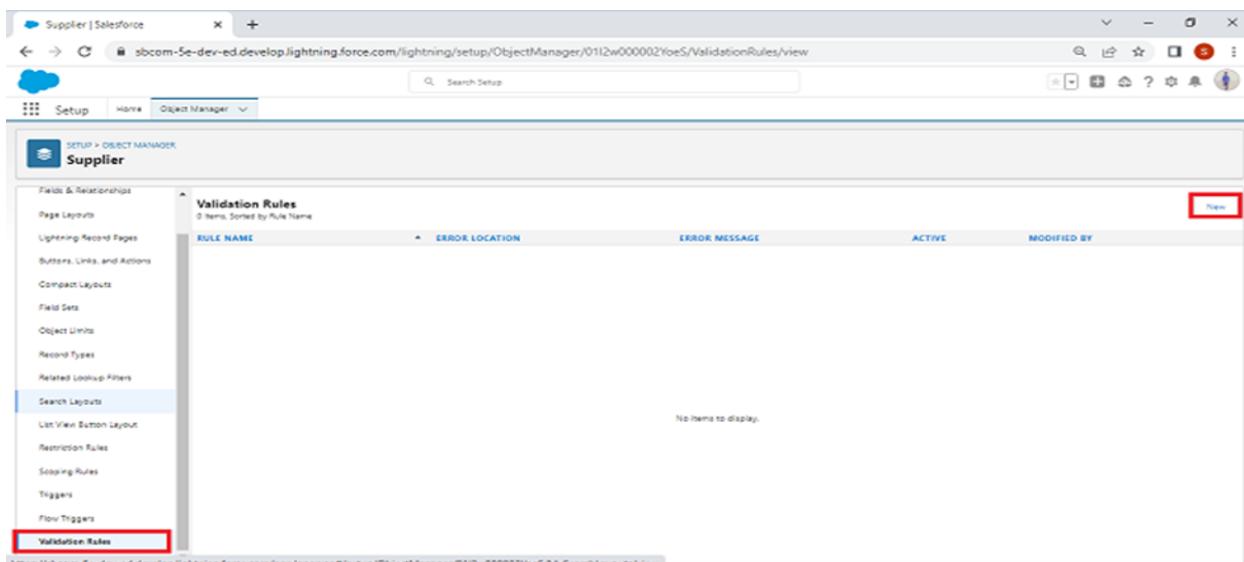
A validation rule is a process which checks out (validate) the inputs given by any user is correct or not according to your requirement.

Activity -1

Creating a Validation Rule:

To create a validation rule:

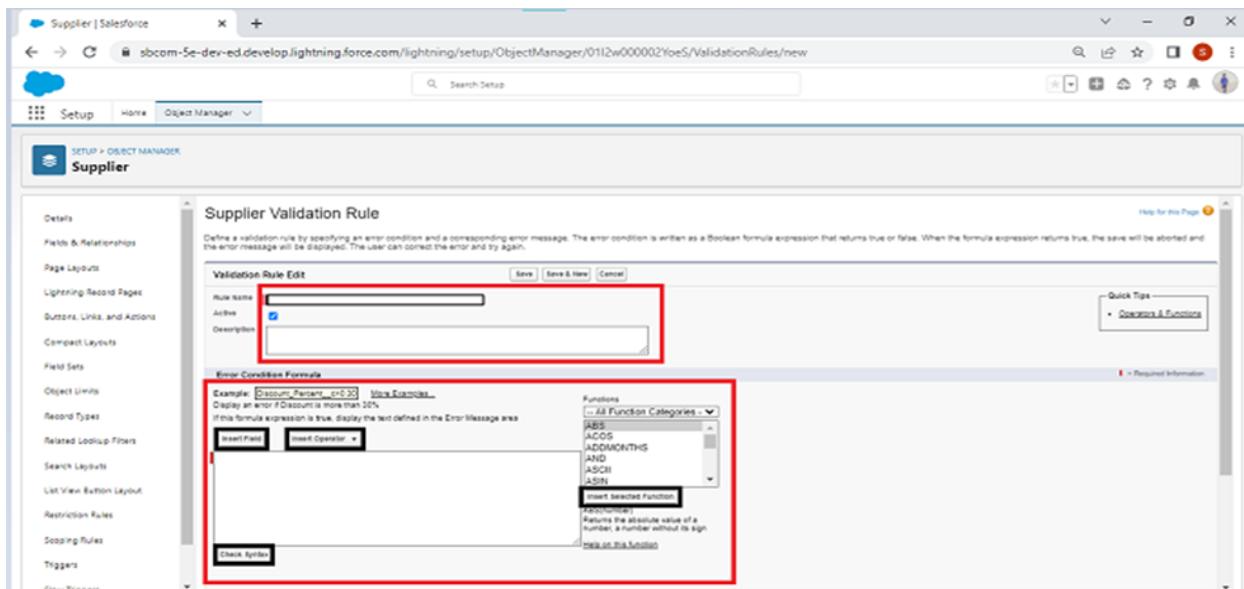
Go to object manager, select the object on which validation rule has to be implemented, scroll down and click validation rule, New.



The screenshot shows the Salesforce Object Manager interface for the 'Supplier' object. On the left, a sidebar lists various object settings like Fields & Relationships, Page Layouts, and Validation Rules. The 'Validation Rules' item is highlighted with a red box. The main content area displays a table titled 'Validation Rules' with one column: 'RULE NAME'. A red box highlights the 'New' button at the top right of the table header.

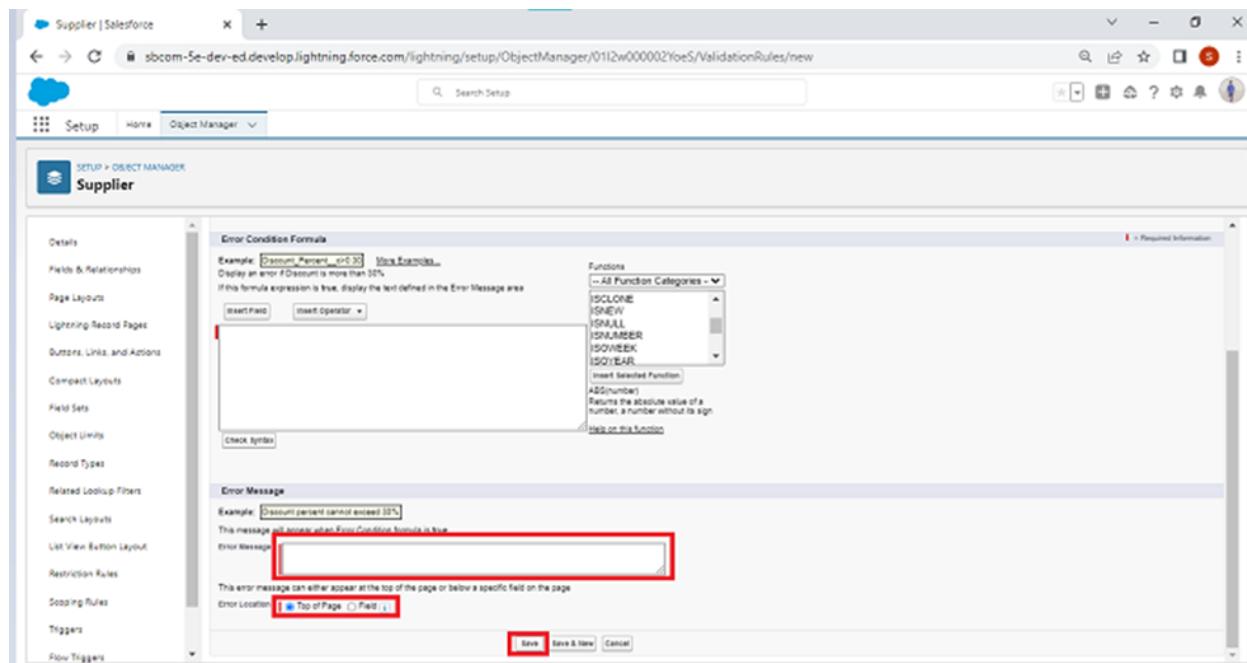
Give details as:

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.



The screenshot shows the 'Supplier Validation Rule' creation page. The 'Rule Name' field is populated with 'Phone number validation rule' and has a red box around it. The 'Active' checkbox is checked. The 'Description' field is empty. In the 'Error Condition Formula' section, the formula 'InsertField > Insert Operator > Check Syntax' is entered, and a red box surrounds this entire area. A tooltip for 'Check Syntax' is visible, stating: 'Example: <InsertField>>10> Displays an error if the value is more than 10.' A dropdown menu for 'Functions' is open, showing options like ABS, ACOS, ADDITION/THS, AND, ASCII, ASIN, etc., with 'Insert selected Function...' highlighted by a red box.

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?

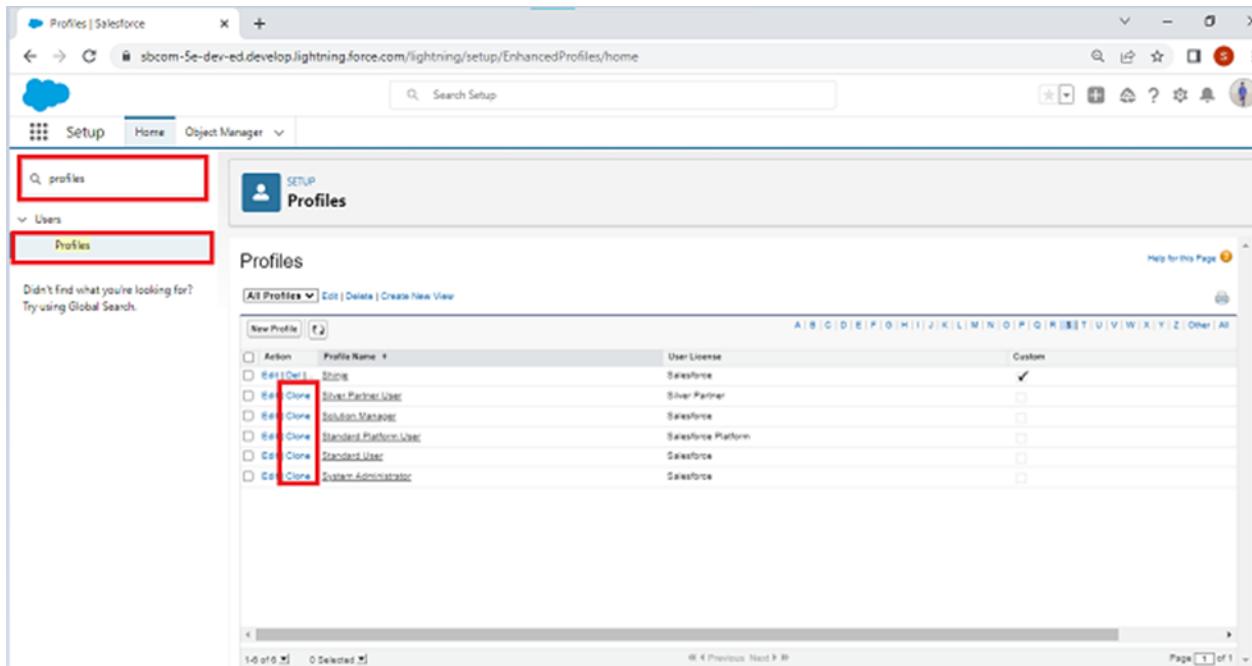
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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



The screenshot shows the Salesforce Setup interface under the Profiles section. A red box highlights the search bar at the top left with the text "profiles". Another red box highlights the "Profiles" link in the sidebar under the "Users" category.

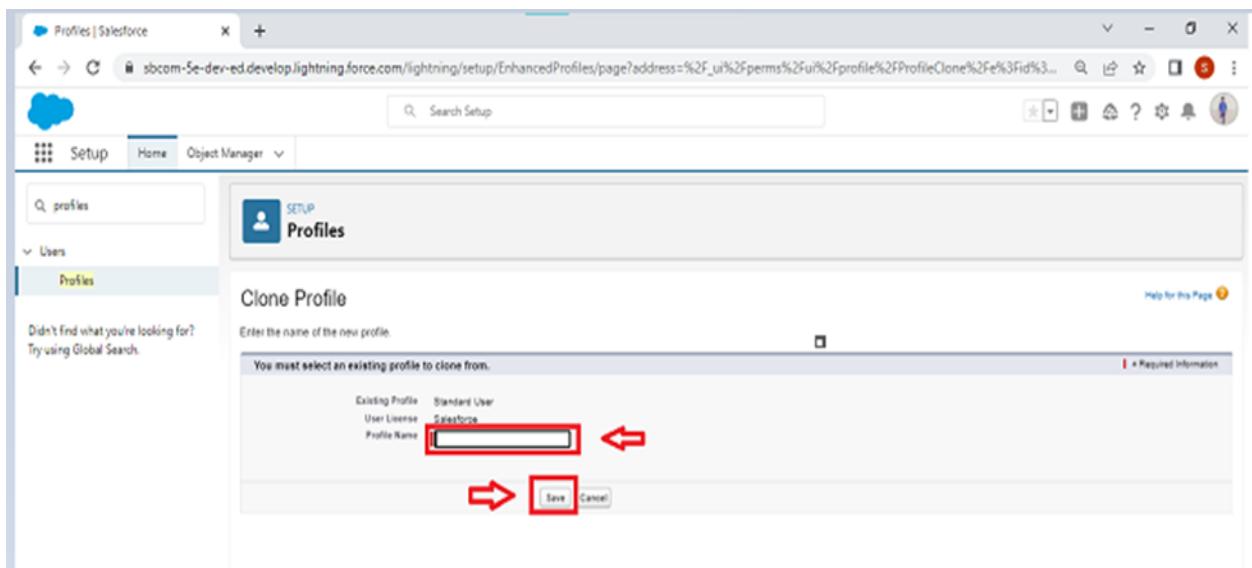
Profiles

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

All Profiles | Edit | Delete | Create New View

Action	Profile Name	User License	Custom
<input type="checkbox"/>	6411Def1	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	6411Clone	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	6411Clone	Solution Manager	<input type="checkbox"/>
<input type="checkbox"/>	6411Clone	Standard Platform User	<input type="checkbox"/>
<input type="checkbox"/>	6411Clone	Standard User	<input type="checkbox"/>
<input type="checkbox"/>	6411Clone	System Administrator	<input type="checkbox"/>

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



The screenshot shows the "Clone Profile" dialog box. A red box highlights the "Profile Name" input field, which contains "Event user profile". Two red arrows point from the bottom of the input field towards the "Save" button. The "Save" button is highlighted with a red box.

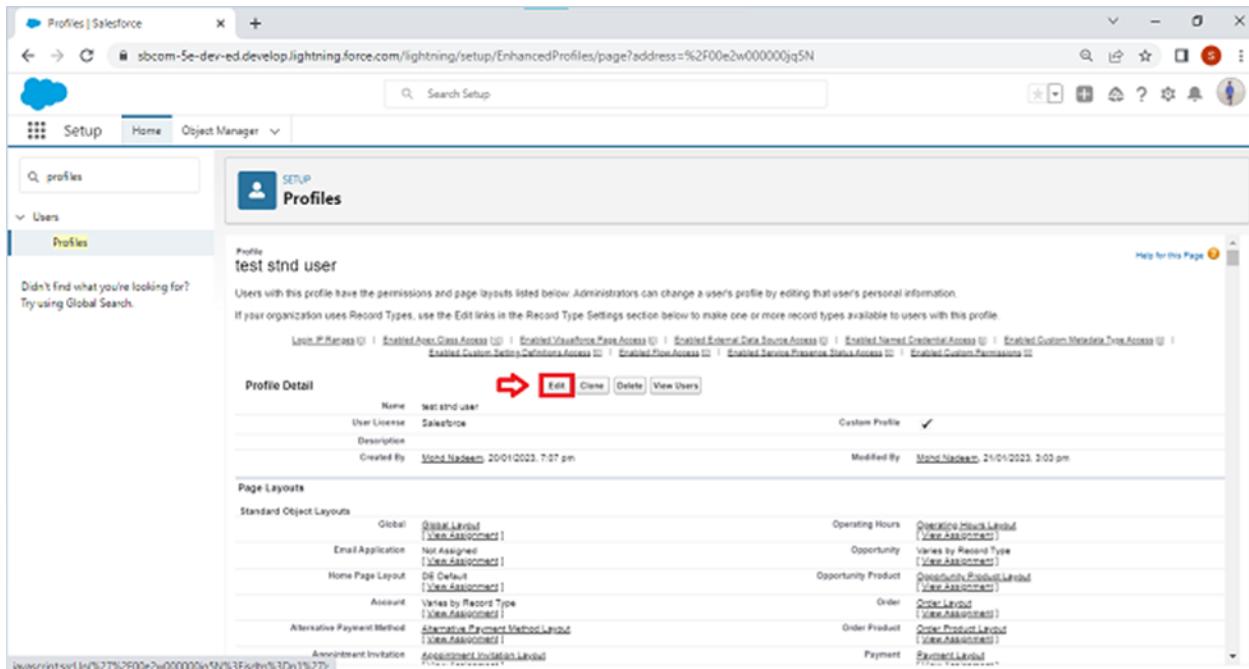
Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

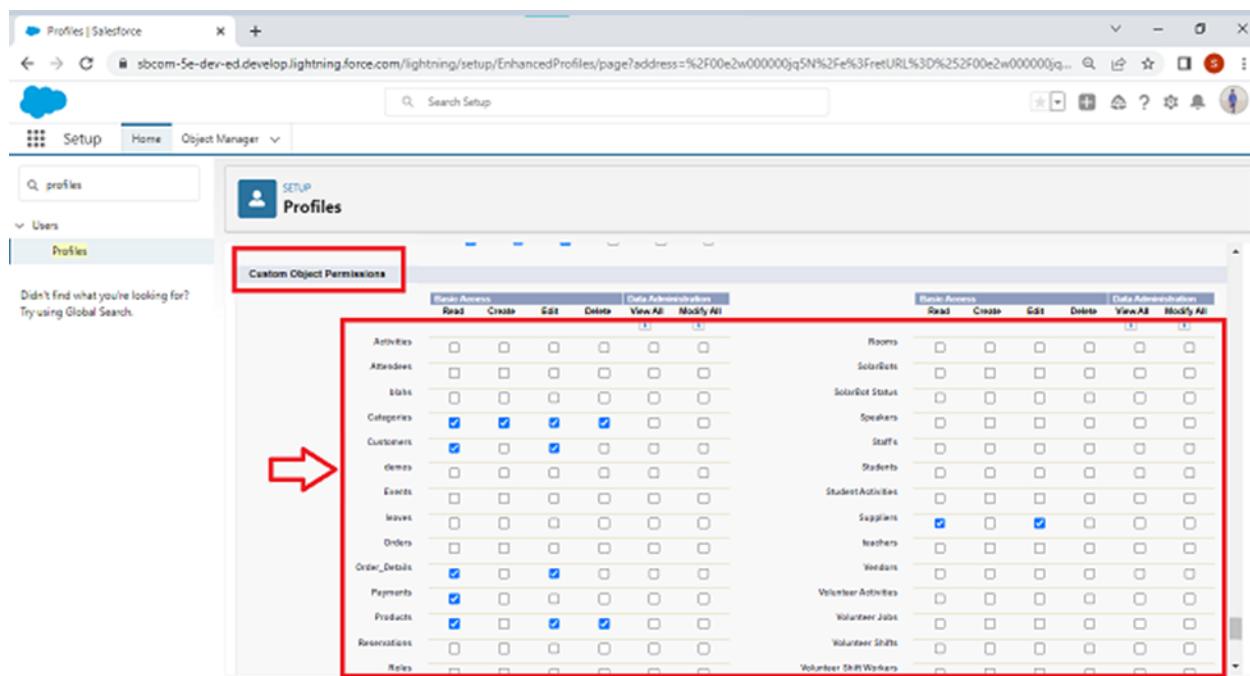
Existing Profile	Standard User
User License	Standard
Profile Name	<input type="text" value="Event user profile"/>

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



The screenshot shows the Salesforce Setup interface under the Profiles section. A specific profile named "test stdnd user" is selected. The "Profile Detail" section displays the profile's name, standard user status, and various permissions. Below this, the "Page Layouts" section lists standard object layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation. The "Edit" button is highlighted with a red arrow.

6. 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. A red box highlights the 'Custom Object Permissions' section. An arrow points from the text 'Activity-1' below to this highlighted area. The permissions grid includes columns for Read, Create, Edit, Delete, View All, and Modify All.

Object	Basic Access						Data Administrations					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Attendees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Blanks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Demands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Leaves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Order_Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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 type="checkbox"/>	<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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Reservations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Roles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

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

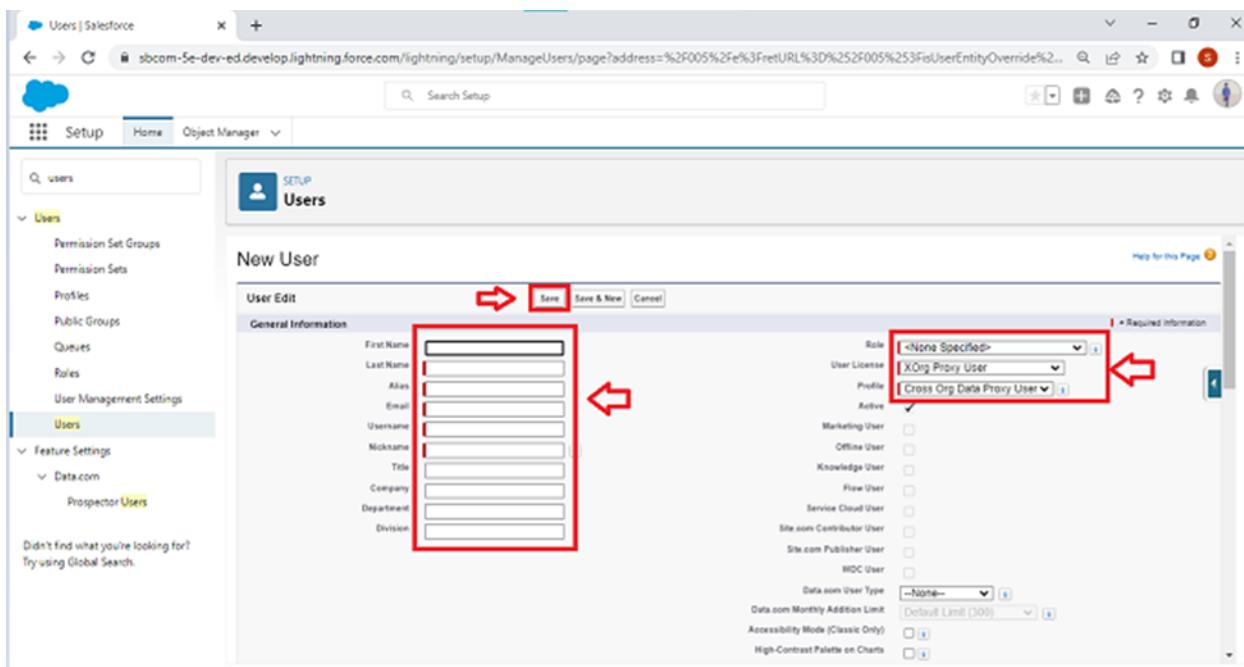
All Users

On this page you can create, view, and manage users.

In addition, download Salesforce® to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices. [iOS](#) | [Android](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Jeanne	jean	jeanne1@salesforce.com		<input type="checkbox"/>	Standard User
Edit	Rebecca Ade	rebe	rebeccaade1@salesforce.com		<input checked="" type="checkbox"/>	Charger Moderator User
Edit	Chatter_Eduard	Chatter	chatter_002@salesforce.com#research.chatter.salesforce.com		<input type="checkbox"/>	Chatter Free User
Edit	Rebecca Ade	rebe	rebeccaade1@salesforce.com	System Admin Team	<input type="checkbox"/>	Custom Sales Profile
Edit	Rebecca Ade	rebe	rebeccaade1@salesforce.com	Customer Support - North America	<input type="checkbox"/>	Standard User
Edit	Rebecca Ade	rebe	rebeccaade1@salesforce.com	CEO	<input checked="" type="checkbox"/>	System Administrator
Edit	Rebecca Ade	rebe	rebeccaade1@salesforce.com	Western Sales Team	<input type="checkbox"/>	Custom Sales Profile
Edit	Rebecca Ade	rebe	rebeccaade1@salesforce.com	CEO	<input checked="" type="checkbox"/>	Mobile Admin
Edit	Rebecca Ade	rebe	rebeccaade1@salesforce.com	Customer Support - International	<input type="checkbox"/>	test_and_platform_user
Edit	Rebecca Ade	rebe	rebeccaade1@salesforce.com	CEO	<input type="checkbox"/>	Shane
Edit	Rebecca Ade	rebe	rebeccaade1@salesforce.com	Marketing Team	<input type="checkbox"/>	Cross-Org Data Privacy User
Edit	Rebecca Ade	rebe	rebeccaade1@salesforce.com		<input type="checkbox"/>	

- 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.

Milestone 11 : Permission set

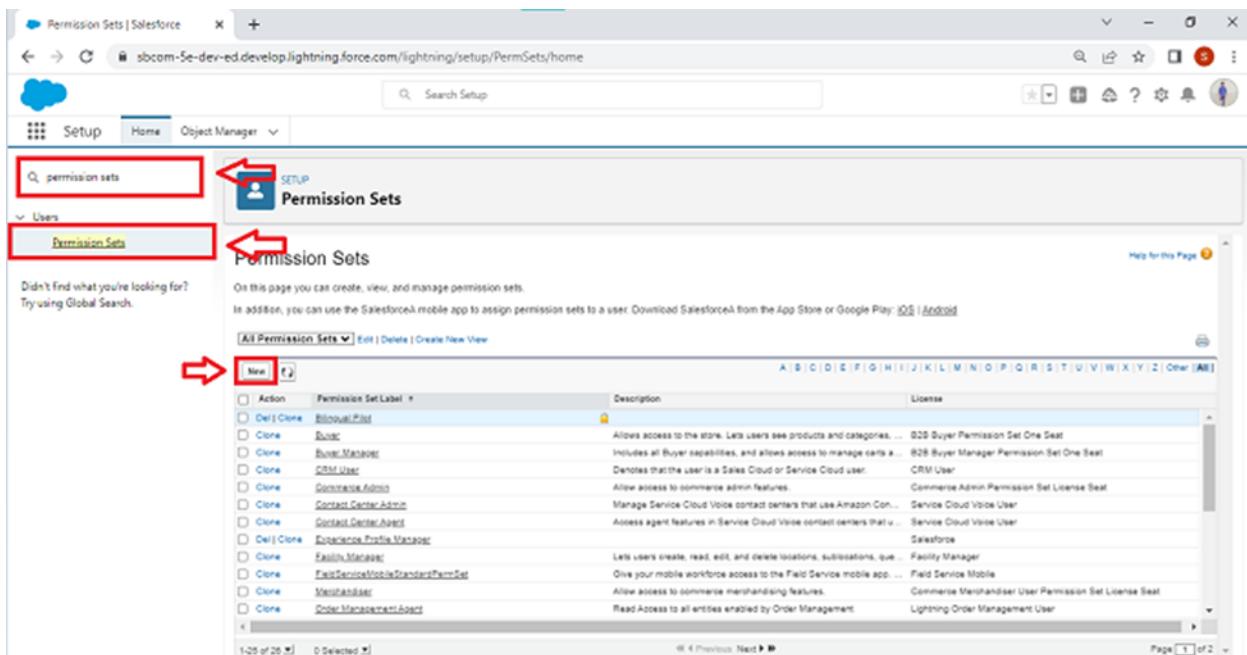
What is the Permission set?

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.



Q: permission sets

permission sets

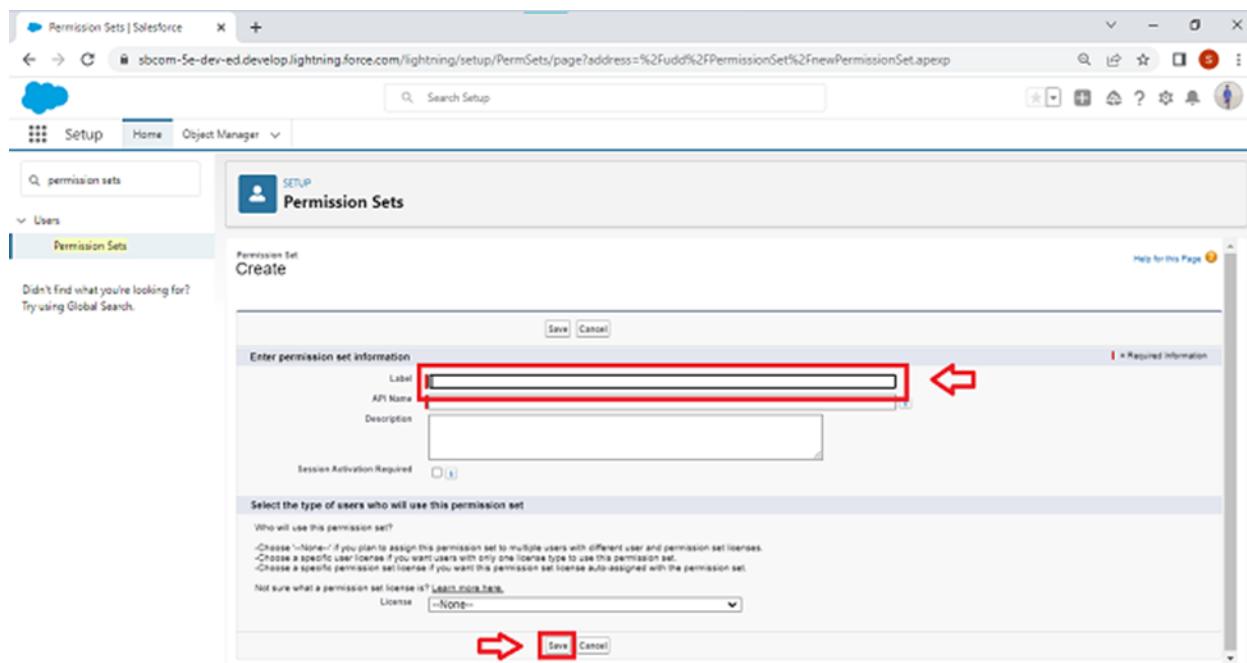
Users

Permission Sets

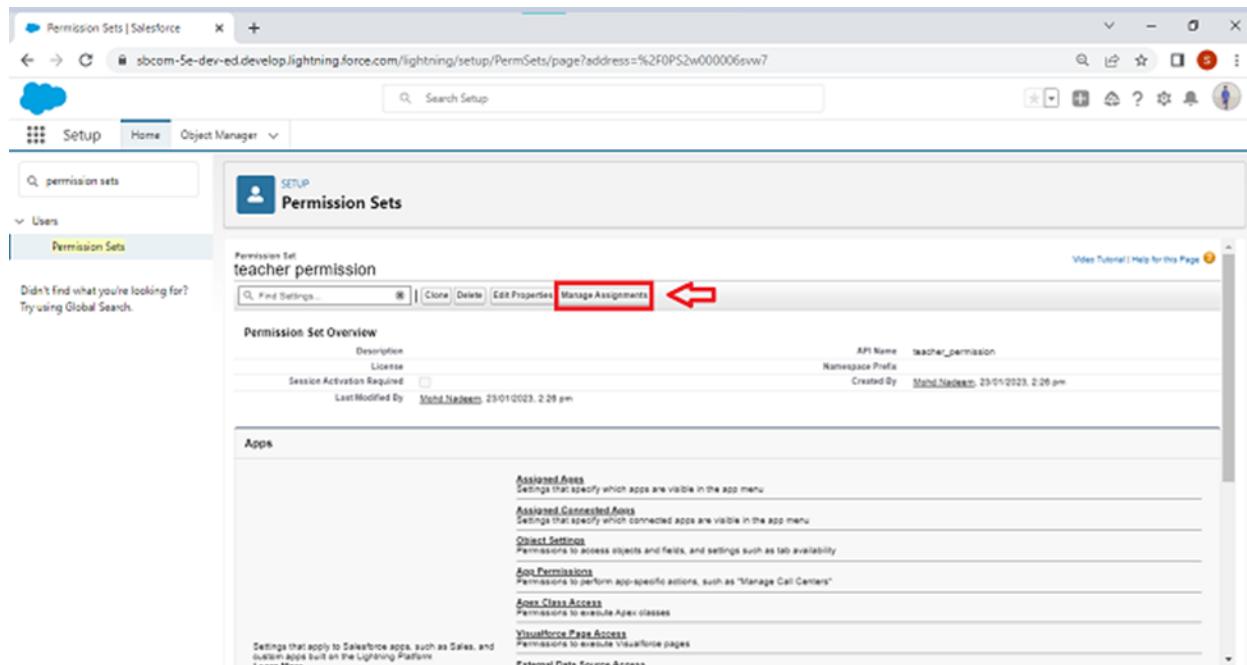
New

Action	Permission Set Label	Description	License
<input type="checkbox"/>	<input checked="" type="checkbox"/> Buyer_Permissions	Allows access to the store. Lets users see products and categories. Includes all Buyer capabilities, and allows access to manage carts and...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	<input checked="" type="checkbox"/> Buyer	Includes all Buyer capabilities, and allows access to manage carts and...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	<input checked="" type="checkbox"/> CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	<input checked="" type="checkbox"/> Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	<input checked="" type="checkbox"/> Contact_Center_Admin	Manage Service Cloud Voice contact centers that use Amazon Con...	Service Cloud Voice User
<input type="checkbox"/>	<input checked="" type="checkbox"/> Contact_Center_Agent	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
<input type="checkbox"/>	<input checked="" type="checkbox"/> Experience_Profile_Manager	Let's users create, read, edit, and delete locations, sublocations, que...	Salesforce
<input type="checkbox"/>	<input checked="" type="checkbox"/> Facility_Manager	Give your mobile workforce access to the Field Service mobile app.	Field Service Mobile
<input type="checkbox"/>	<input checked="" type="checkbox"/> FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	<input checked="" type="checkbox"/> Merchandise	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	<input checked="" type="checkbox"/> Order_Management_Admin		

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

A screenshot of the Salesforce Setup interface. The title bar shows 'Permission Sets | Salesforce'. The left sidebar has 'Setup' selected under 'Permission Sets'. The main area shows a permission set named 'teacher permission'. Below it, a section titled 'Current Assignments' displays a cactus illustration and the message 'No assignments defined.' A red arrow points to a blue 'Add Assignment' button at the top right of this section.

5. Now select the users and click on save

The screenshot shows the 'Permission Sets' page in Salesforce. A specific permission set named 'teacher permission' is selected. The 'Select Users to Assign' section displays a list of users from the 'Recently Viewed' list. On the left, there are checkboxes for selecting users, and a red box highlights the checkboxes for the first two users in the list. The list includes the following users:

Full Name	Title	Email
Sohadeen Zafar		sohadeen27@gmail.com
Sohadeen Zafar		sohadeen27@gmail.com
Mohd Nadeem	Developer	mo.nadeem27@gmail.com
Asif Hussain		asif.hussain27@gmail.com
user 1		sayluradeem27@gmail.com
Asif Hussain	Sales Representative	sayluradeem27@gmail.com
Saylur Adeem	Sales Data Quality Specialist	sayluradeem27@gmail.com
Sohadeen Zafar	Account Executive	sohadeen27@gmail.com
Lakshmi Unnik		lakshmi.unnik@gmail.com

A red arrow points to the 'Next' button at the bottom right of the user selection area.

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.

Recently Viewed | Events | Salesforce X +

sbcom-5e-dev-ed.lightning.force.com/lightning/o/Event__c/list?filterName=Recent

Event Management Guests Attendee Speakers Vendors Reports Dashboards

Events Recently Viewed ▾

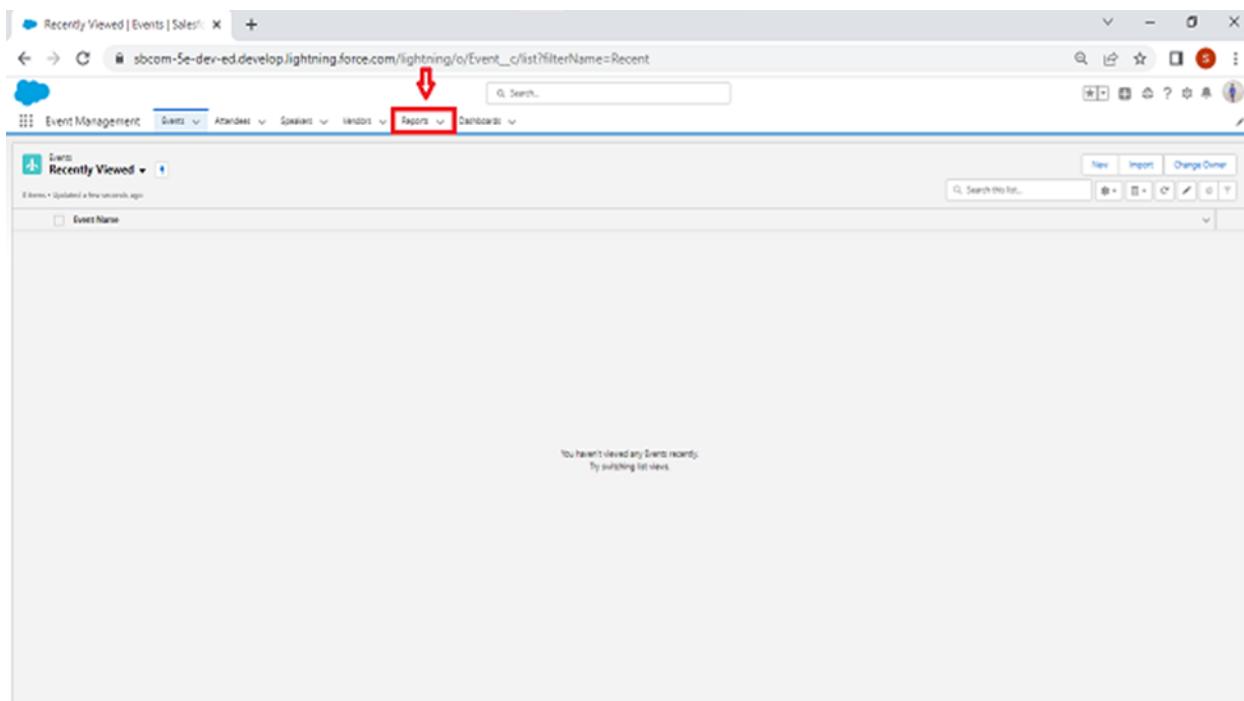
0 items. Updated a few seconds ago.

Event Name

New Import Change Owner

Search this list...

You haven't viewed any Events recently.
Try publishing list views.



Reports | Salesforce X +

sbcom-5e-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru

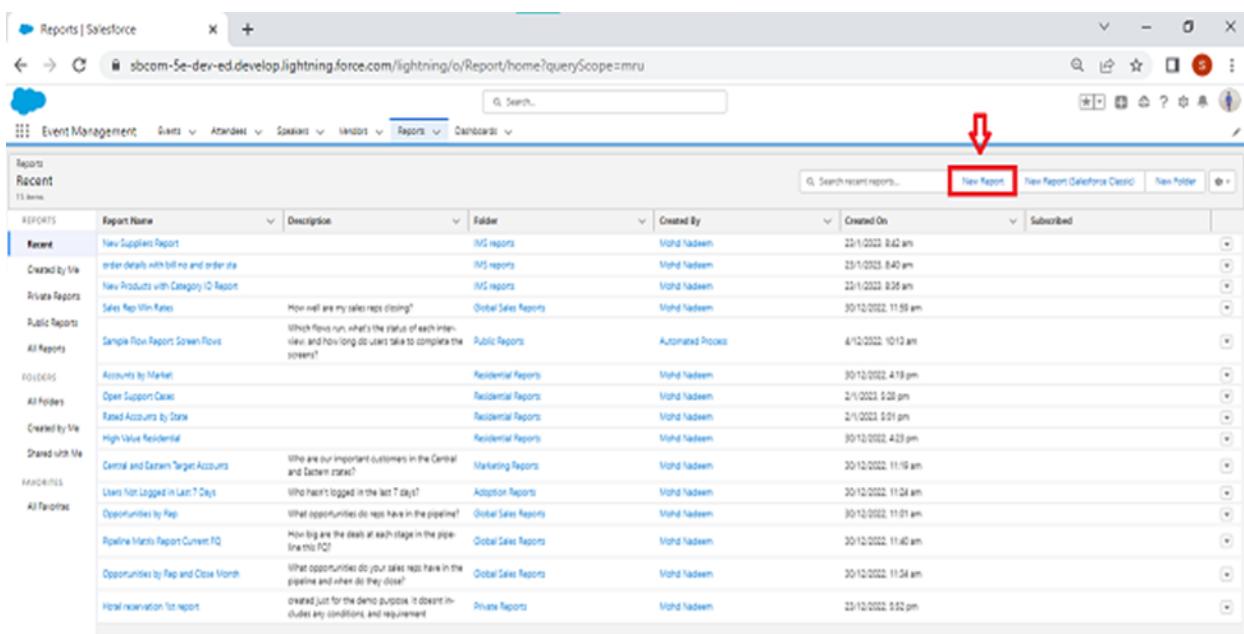
Event Management Events Attendee Speakers Vendors Reports Dashboards

Reports Recent 13 items

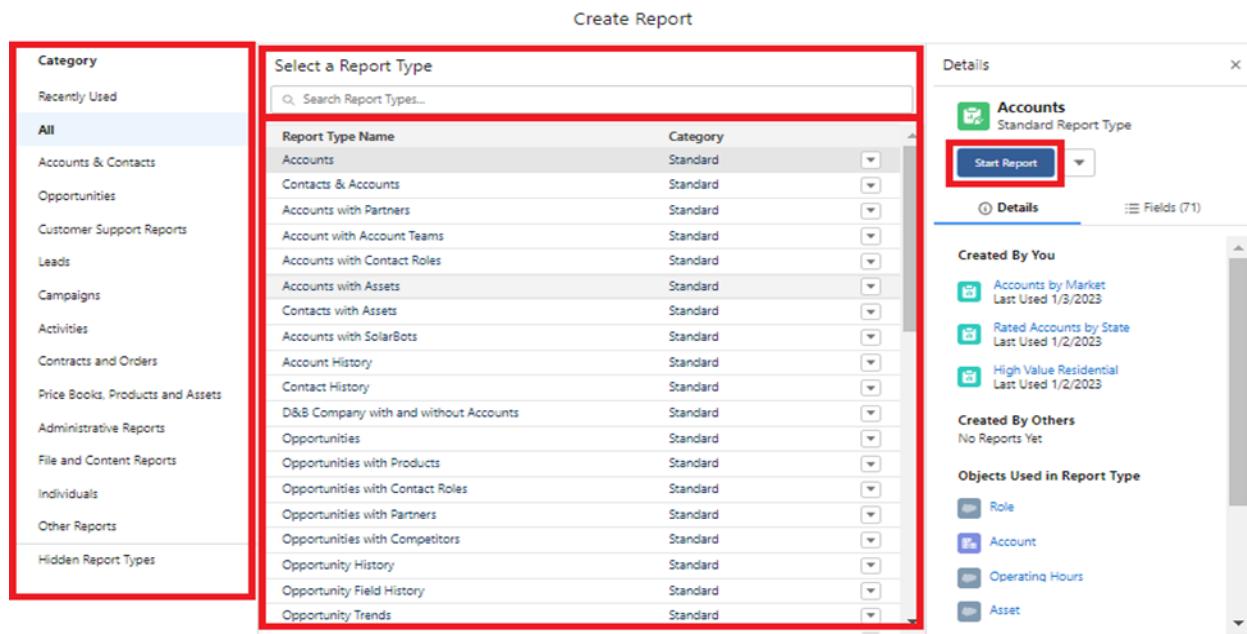
REPORTS

Report Name	Description	Folder	Created By	Created On	Subscribed
New Suppliers Report	Order details with bill no and order date	IM2 Reports	Mohd Nadeem	22/1/2022 2:42 am	
New Products with Category ID Report	Order details with bill no and order date	IM2 Reports	Mohd Nadeem	22/1/2022 8:40 am	
Sales Rep Win Rates	How well are my sales reps doing?	Global Sales Reports	Mohd Nadeem	30/12/2022, 11:59 am	
Sample Row Reports Screen Rows	Which flows run, what's the status of each Inter-view, and how long do users take to complete the screens?	Public Reports	Automated Process	4/12/2022, 10:12 am	
Accounts by Market		Residential Reports	Mohd Nadeem	30/12/2022, 4:19 pm	
Open Support Cases		Residential Reports	Mohd Nadeem	2/1/2023, 1:26 pm	
Rated Accounts by Score		Residential Reports	Mohd Nadeem	2/1/2023, 1:21 pm	
High Value Residential		Residential Reports	Mohd Nadeem	30/12/2022, 4:23 pm	
Central and Eastern Target Accounts	Who are our important customers in the Central and Eastern states?	Marketing Reports	Mohd Nadeem	30/12/2022, 11:19 am	
Users Not Logged in Last 7 Days	Who hasn't logged in the last 7 days?	Adoption Reports	Mohd Nadeem	30/12/2022, 11:24 am	
Opportunities by Rep	What opportunities do reps have in the pipeline?	Global Sales Reports	Mohd Nadeem	30/12/2022, 11:01 am	
Pipeline Matrix Report Current PQ	How big are the deals at each stage in the pipeline this PQ?	Global Sales Reports	Mohd Nadeem	30/12/2022, 11:45 am	
Opportunities by Rep and Close Month	What opportunities do your sales reps have in the pipeline and when do they close?	Global Sales Reports	Mohd Nadeem	30/12/2022, 11:24 am	
Final Reservation Test report	Created just for the demo purpose. It doesn't include any conditions and requirement	Private Reports	Mohd Nadeem	23/12/2022, 5:52 pm	

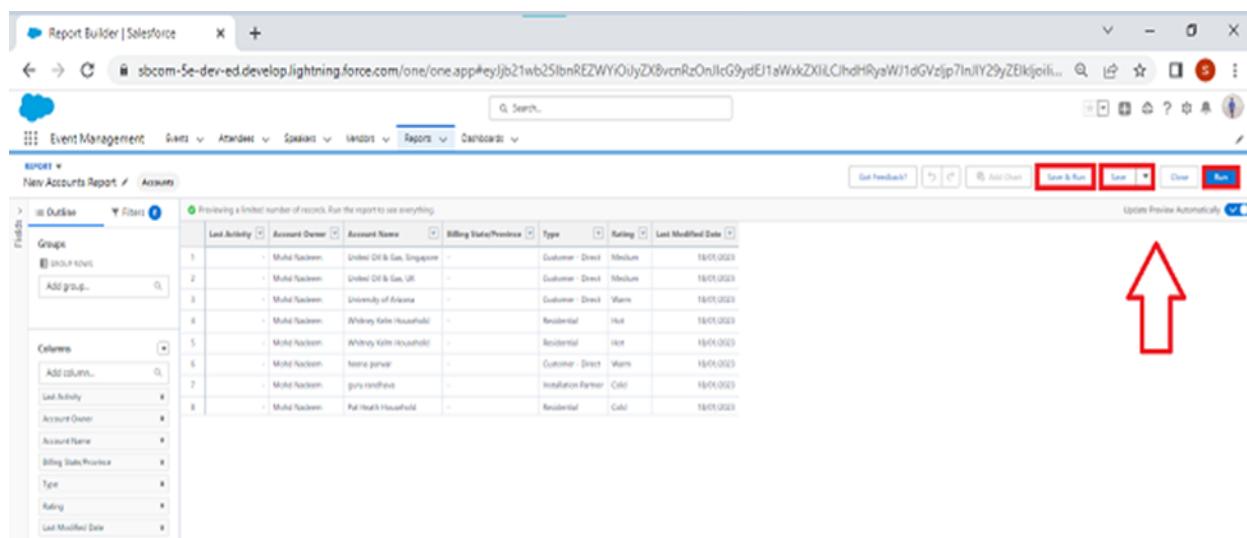
New Report New Report (Salesforce Classic) New Folder



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.



Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	Muth Radchen	Unilever Oil & Gas, Singapore	-	Customer - Direct	Medium	18/01/2023
2	Muth Radchen	Unilever Oil & Gas, UK	-	Customer - Direct	Medium	18/01/2023
3	Muth Radchen	University of Arizona	-	Customer - Direct	Warm	18/01/2023
4	Muth Radchen	Anthony Katie Household	-	Residential	Hot	18/01/2023
5	Muth Radchen	Anthony Katie Household	-	Residential	Hot	18/01/2023
6	Muth Radchen	Neera Javeri	-	Customer - Direct	Warm	18/01/2023
7	Muth Radchen	guru ramaiah	-	Insulation Partner	Cold	18/01/2023
8	Muth Radchen	Pat Health Household	-	Residential	Cold	18/01/2023

Activity-2

Create a report for review and Job Posting Objects.