



JOB APPLICATION TRACKING SYSTEM

Project Based Experiential Learning Program

Job Application Tracking System

1. INTRODUCTION

1.1 OVERVIEW

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, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

1.2 PURPOSE

- Streamlines recruiting.
- Posts jobs on multiple job boards.
- Saves time by automating mundane tasks.
- Builds your brand.
- Manages talent database.
- Promotes easy collaboration among the recruiting teams.

Brainstorm

Write down any ideas that come to mind that address your problem statement.

⌚ 10 minutes

Muthupriya M

Encourage team work and interpersonal skills	Develop creativity and problem solving skills	Develop team spirit

Mamatha M

Encourage creativity and problem solving skills	Develop team spirit	Develop team spirit

Hemalakshmi A

Develop team work and interpersonal skills	Develop creativity and problem solving skills	Develop team spirit

Person 5

Person 6

Person 7



Group Ideas

Take a few moments to record your initial thoughts on paper. Draw all the ideas you have in your mind about a customer lifetime. It's easier to begin this exercise now, because you will need this information to group.

5 minutes





Job Application Tracking System

Project Description

Create a CRM Application which helps the applicant to track the No. of jobs he applied and helps him to find the job posted by the various recruiters, find the best attributes to be involved to run the process in a smooth way and easily to track.

Create a Data Model for the App

To make the existing app more efficient for the Job application we create custom objects and relationships to store and access the data more efficiently.

Introduction

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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, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

Milestone 1- Salesforce:

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:



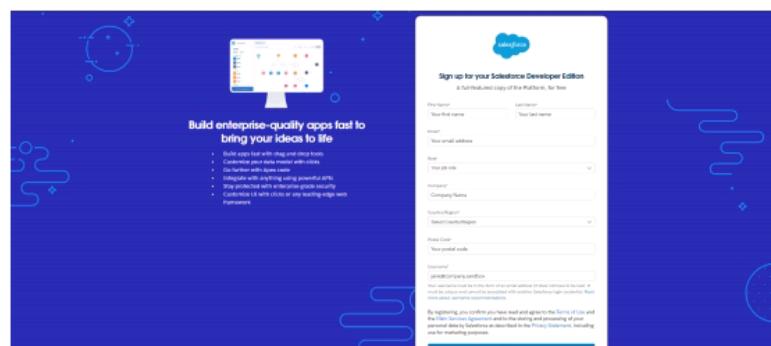
<https://youtu.be/r9EX3lGde5k>

Activity1:

Creating a Salesforce Developer Org:

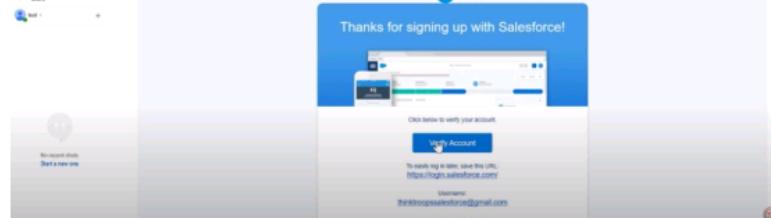
A Developer org has all the features and licenses you need to get started with Salesforce.

1. Search [Developer.salesforce.com](https://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.

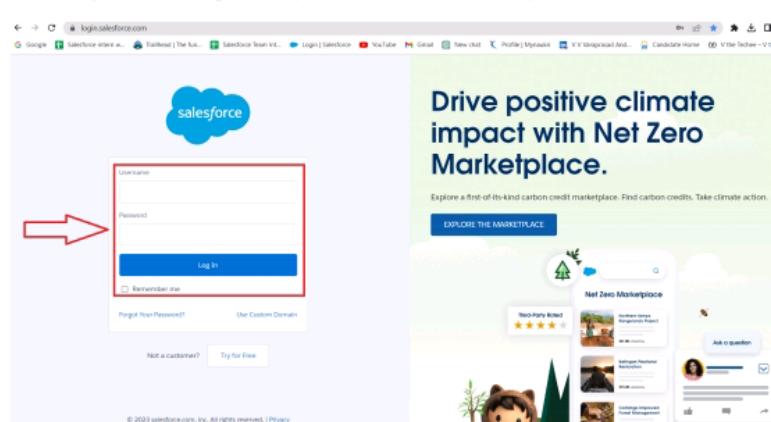
3. Click sign me up, after a few min you will reserve a mail salesforce org and by using the verify account link you can create your new password.



4. Click save.

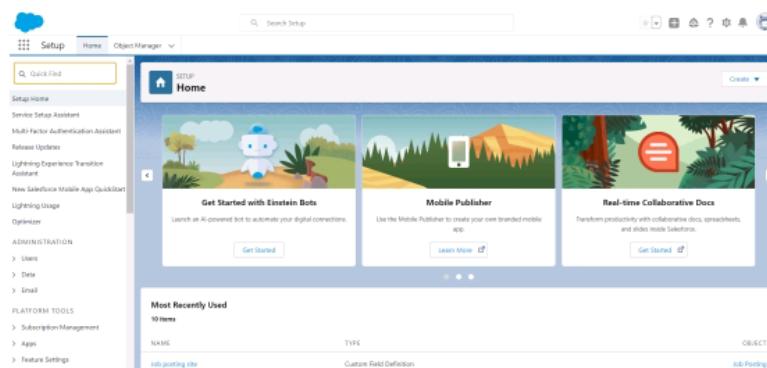
5. Search login.salesforce.com

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





The setup page will appear as below.



Milestone 2-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.

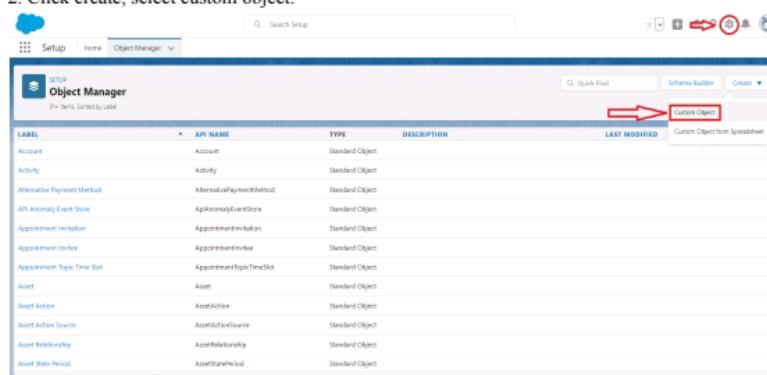


Activity 1:

Create a custom object for Recruiter:

To create a custom object, follow these steps:

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



Job_Application_Tracking_...

Asset Action Search	Asset Relationship	Standard Object
Asset Relationship	AssetRelationship	Standard Object
Asset State Period	AssetStatePeriod	Standard Object

3. Fill in the label as " Recruiter ".
4. Fill in the plural label as " Recruiters".
5. Record name: " Recruiter 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 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.



New Custom Object

Custom Object Definition Edit

Custom Object Information

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

Record Name	Recruiter	Example: Account
Plural Label	Recruiters	Example: Accounts

Starts with view record

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

Object Name	Recruiter	Example: Account
-------------	-----------	------------------

Description

Contact, Relative Help Setting Open the standard Salesforce or core Help & Training interface Open a window using a Visualforce page

Custom Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, toolbars, 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	Recruiter Number	Example: Account Name
Data Type	Auto Number	Example: Account
Display Format	REC-{0000}	Example: A (0000) (0000,000)
Marking Number	1	

New Custom Object

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Extend 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 Reports
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

- Is Unmanaged
- 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 the custom object

[Save](#) [Save & New](#) [Cancel](#)

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

Activity 2:

1. Create a Jobs, Candidate, Job Application Object and Tab.
Note :- Follow the steps from the above activity



Rotate screen



Play



Thumbnail





Milestone 3- 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 the custom fields:

1.Click the object manager tab, Select the object for which you have to create the fields and relationships.



LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
All Around Event Store	AllAroundEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Inviter	AppointmentInviter	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			





Object Manager

103 items, Sorted by Label

Label	API Name	Type	Description	Last Modified	Deployed
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invite	AppointmentInvite	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset Status Period	AssetStatusPeriod	Standard Object			

2. From the sidebar, click Fields & Relationships. Notice that there are already some fields there. Those are the standard fields.



SETUP > OBJECT MANAGER

Recruiter

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		
Recruiter Number	Name	Auto Number		

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.



SETUP > OBJECT MANAGER

Recruiter

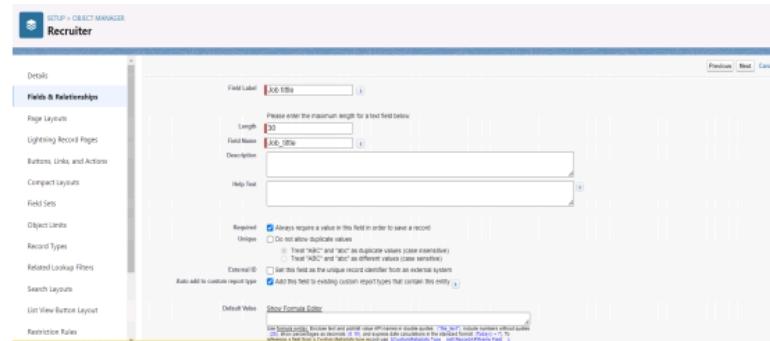
Fields & Relationships

New

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		
Recruiter Number	Name	Auto Number		

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



SETUP > OBJECT MANAGER
Recruiter

Fields & Relationships

Field Label: Job Title
Length: 30
Field Name: Job__Title
Description:
Help Text:
Required: Always require a value in this field in order to save a record
Unique: Do not allow duplicate values
External ID: Use this field as the unique record identifier from an external system
Auto add to custom report type: Add this field to existing custom report types that contain this entry
Default Value: [Show Formula Editor](#)

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

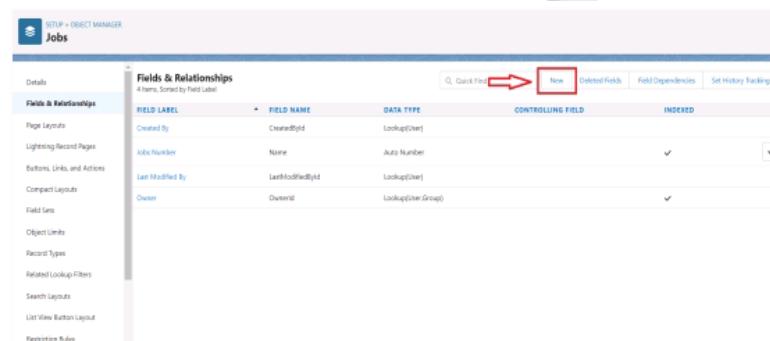
8. Select the page layouts that should include this field.

9. Click save.

Activity 2:

Creation of Master-detail relationship:

1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.

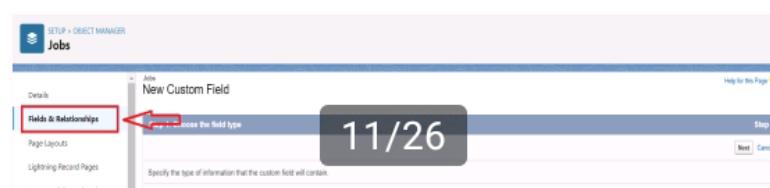


SETUP > OBJECT MANAGER
Jobs

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Job Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓

4. Choose Master-detail Relationship and click Next



SETUP > OBJECT MANAGER
Jobs

New Custom Field

Fields & Relationships

11/26

Specify the type of information that the custom field will contain.



SETUP > OBJECT MANAGER

Jobs

Fields & Relationships

New Relationship

Step 2: Choose the related object

Select the other object to which this object is related:

Related To: **Recruiter** ←

Step 3 of 6

Previous Next Cancel

6. Enter the label and name for the lookup field

SETUP > OBJECT MANAGER

Jobs

Fields & Relationships

New Relationship

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

Field Label: **Recruiter**

Field Name: **Recruiter**

Description:

Help Text:

Child Relationship Name: **Recruiter**

Sharing Setting:

Recruiters can see their own records and records from other users.

Recruiters can see their own records and records from other users.

Allow representing: CRM records can be represented by other parent records after they are created.

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

Lookup Filter

7. Click Next, Next, and Save

Activity 3:

Create a new custom field:

- From Setup, go to Object Manager
- On the sidebar, click Fields & Relationships.
- Click New.

SETUP > OBJECT MANAGER

Jobs

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(Var)		
Jobs Number	Name	Auto Number		

 →



Details

Fields & Relationships (highlighted)

Text Area (highlighted)

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

Allows users to enter formatted text, add images and links. Up to 100,000 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: "7:00 AM", "11:30", "12:00 PM", and "12:00-00:00" are all valid times for this field.

5. Enter the Field Label and field name click next

Step 2: Enter the details

Field Label: Description

Field Name: 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: New Frome de Página

6. Click next and save.



Activity 4:

Create a new custom field:

16/26

1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.



Job_Application_Tracking_...



SETUP > OBJECT MANAGER

Jobs

Fields & Relationships (highlighted)

Text Area (highlighted with a red arrow)

5. Enter the Field Label and field name click next

SETUP > OBJECT MANAGER

Jobs

New Custom Field

Step 2: Enter the details

Field Label: Description (highlighted)

Field Name: Description (highlighted)

Help Text:

Required: Allow user to select 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 entry.

Default Value:

6. Click next and save.

16/26



Rotate screen



Play



Thumbnail

Activity 4:**Create a new custom field:**

1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.

The screenshot shows the 'Fields & Relationships' section of the Salesforce Object Manager for the 'Jobs' object. The table lists four existing fields: 'Created By', 'Jobs Number', 'Last Modified By', and 'Owner'. The 'Created By' field is highlighted with a red box. The 'New' button is also highlighted with a red box at the top right of the table header.

4. Choose the data type Text click next

The screenshot shows the 'Fields & Relationships' section of the Salesforce Object Manager for the 'Jobs' object. The 'Text' data type is selected under both 'Field Label' and 'Data Type'. A red box highlights the 'Text' option under 'Field Label' and another red box highlights the 'Text' option under 'Data Type'.

5. Enter the Field Label and field name click next

The screenshot shows the 'New Custom Field' setup page, Step 2: Enter the details. The 'Field Label' is set to 'Location' and the 'Data Type' is set to 'Text'. A red box highlights the 'Field Label' input field.



6. Click next and save.



Milestone 4-Tab:

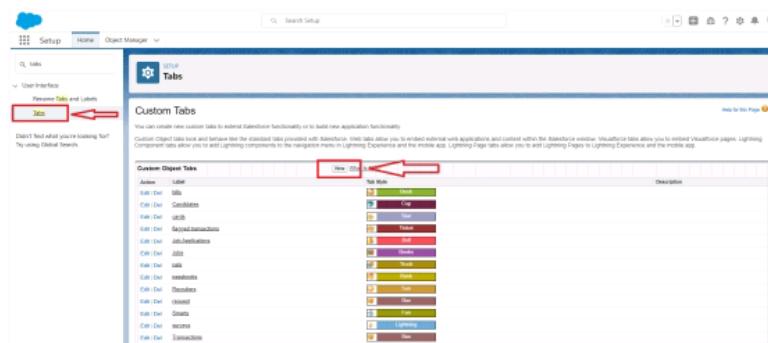
What is Tab?

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.

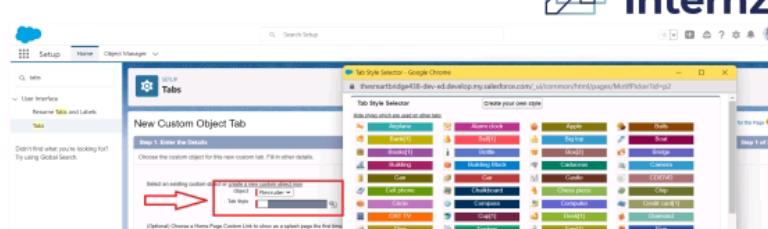
Activity 1 :

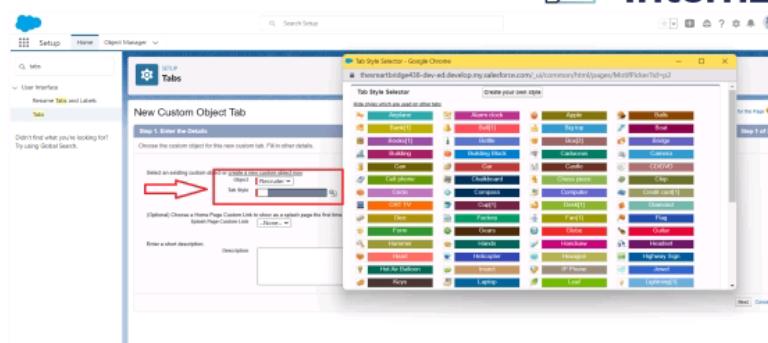
Create a tab :

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.

Milestone 5- Profile:

What is a profile?

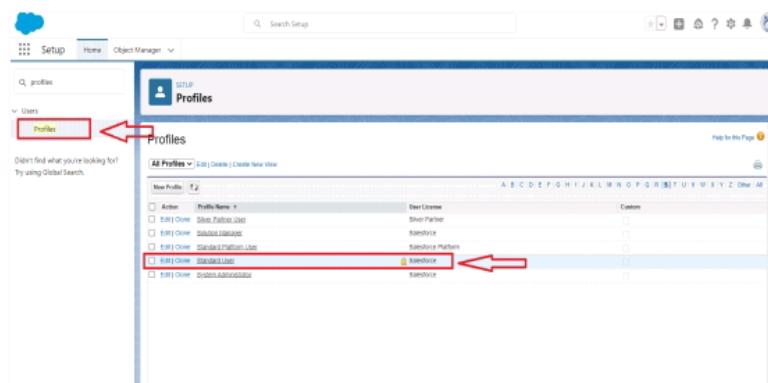
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

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

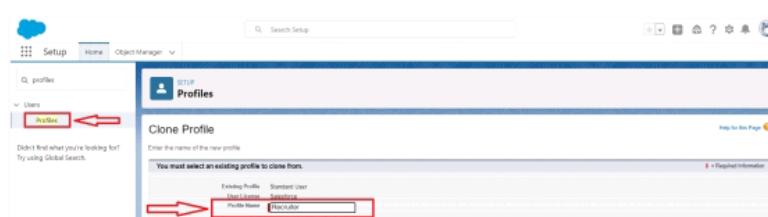
Activity 1:

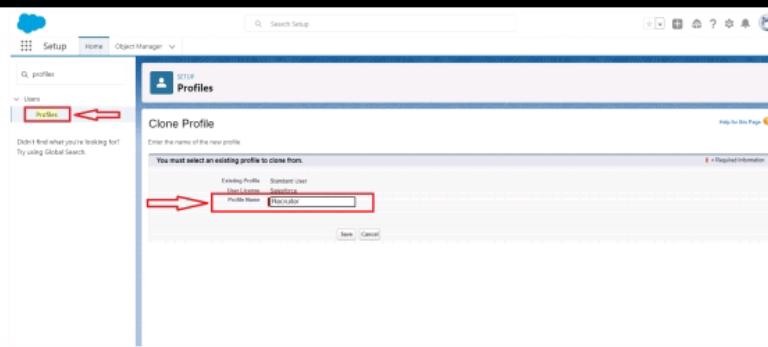
Create a custom profile :

1. From setup , enter profiles in Quick Find box
2. Select profiles.
3. Click clone.



4. For Profile, enter Recruiter.





5. Click save.



Activity 2:

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

Follow the steps from above Activity

Milestone 6-User

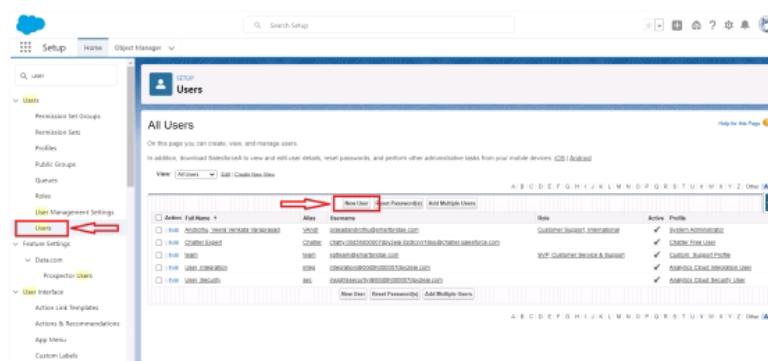
What is a user?

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:

To Create a user:

1. From Setup, enter Users in the Quick Find box, then select Users.
2. Click New User.

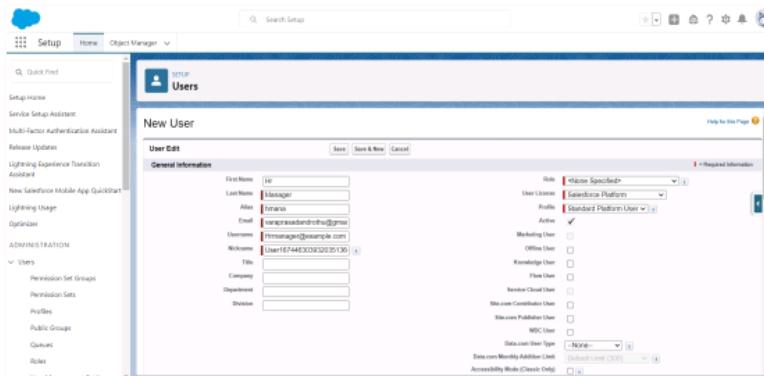


3. Enter First name as Hr and last name as Manager.
4. Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.





5. Then create a new role Hr Manager.
6. Select user License as Standard Platform User.
7. Select profile.



8. Click save

Activity 2:

Create a user with a username as “Ganesh Gelli”, and assign him the sales Manager profile.
Follow the steps from above Activity

Milestone 7-Sharing Rules

What are Sharing Rules?

Sharing rules help users to share records based on conditions. It is basically created for objects whose organization-wide defaults (OWD) are set to public read-only or private because sharing rules can only extend the access and not restrict it.

Types of sharing rules,

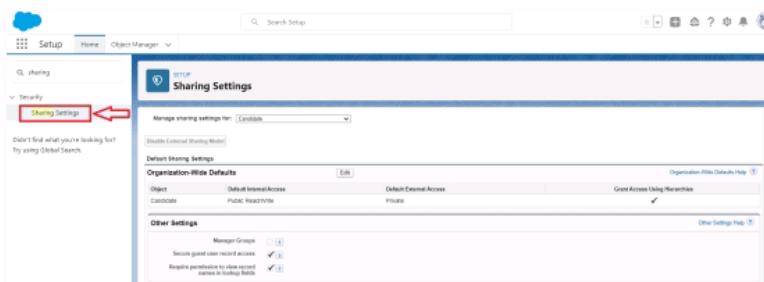
- Owner-based Sharing Rules
- Criteria-based Sharing Rules

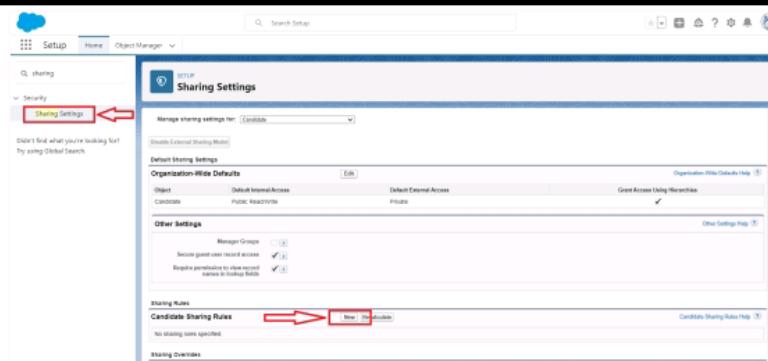


Activity 1:

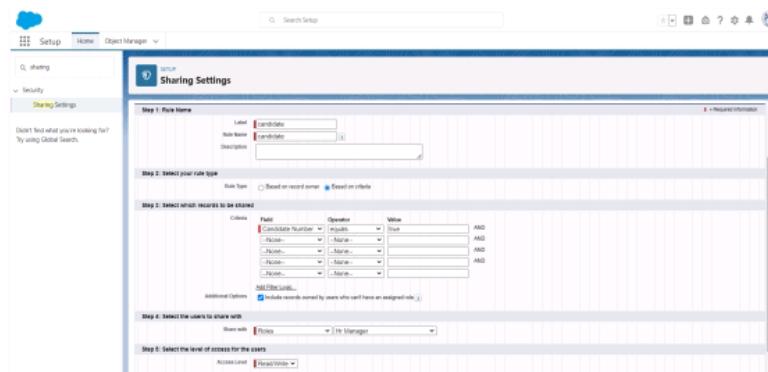
Create a sharing rule

- 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 field 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 select 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.

Activity 2:

Create a Sharing Rule to Share the records of Job Application to Hr Manager with the Access of Read/Write.

Follow the steps from above Activity.

Milestone 8-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.

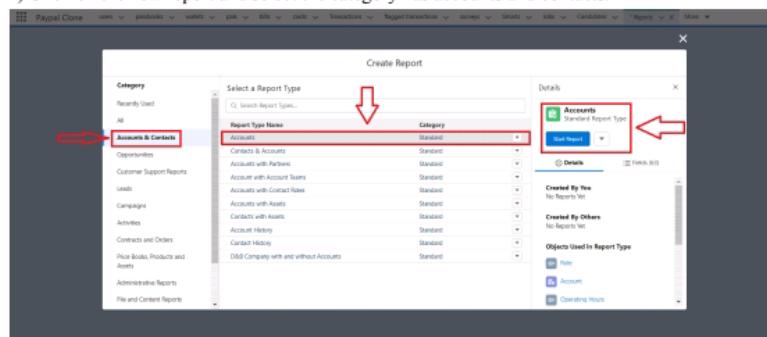


Activity 1:

Create a report:

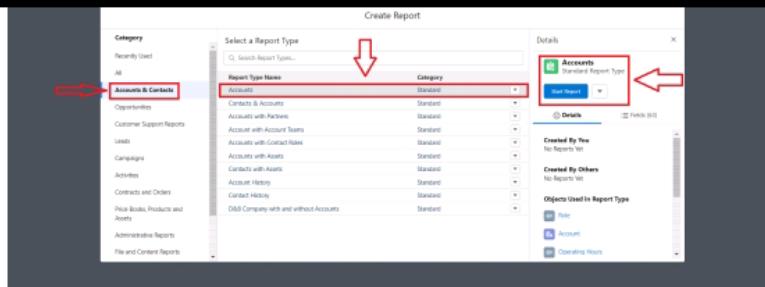
Create a report that displays rating of the account and which has type and account name.

- 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 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 section add Type and Billing city.

Type	Billing City	Customer - Direct	Audit	Automation	Chicago	New York	Singapore	Japan	Customer - Channel	Licenses	Business View	Rate	Period	Submitted	
Record Count	1	1	2	0	0	1	0	0	1	0	2	1	0	1	0
Record Count	1	0	1	1	0	1	0	0	0	0	2	0	0	0	4
Record Count	0	0	0	0	0	0	1	0	0	1	3	0	0	0	3
Record Count	0	0	0	0	0	0	0	0	0	0	0	0	1	0	2
Record Count	2	1	2	1	1	1	1	1	1	1	7	1	1	1	6



- 3) And the report type has accounts.
- 4) In the details section select the option start report.
- 5) In the filter pane select All 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 section add Type and Billing city.

Rating	Billing City	San Francisco	Seattle	Atlanta	Austin	Baltimore	Chicago	New York	Singapore	Toronto	Seattle	London	Mumbai	Paris	Helsinki	Total
All	All	1	2	0	0	1	0	0	1	1	0	1	0	1	0	2
Not	Not	1	0	1	1	0	1	0	0	1	0	2	0	0	0	4
Record Count	Record Count	1	0	1	1	0	1	0	0	1	0	2	0	0	0	4
Record Count	Record Count	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Record Count	Record Count	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Record Count	Record Count	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Record Count	Record Count	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Record Count	Record Count	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Record Count	Record Count	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	Total	2	2	1	1	1	1	1	1	1	1	2	0	1	0	2

Details (10 Rows): Click an intersection in the table above to filter details.

Last Activity	Account Owner	Account Name	Billing State/Province	Last Modified Date
10	Neara Venkatesh Amirthu	United Oil & Gas Corp.	NY	11/14/2012
11	Neara Venkatesh Amirthu	Rutherford Textile Corp of America	NC	11/14/2012
12	Neara Venkatesh Amirthu	General Hotels & Resorts Ltd	IL	11/14/2012
13	Neara Venkatesh Amirthu	University of Arizona	AZ	11/14/2012
14	Neara Venkatesh Amirthu	Genforne	CA	11/14/2012
15	Neara Venkatesh Amirthu	Express Logistic and Transport	OR	11/14/2012
16				

- 9) Save the report by giving label name and save the folder as a public folder and save the report.

Activity 2:

Create a Report using the Objects Jobs, Candidate and Job Application.
Follow the steps from above Activity.

TRAILHEAD |

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