



## JOB APPLICATION TRACKING SYSTEM

**Project Based Experiential Learning Program**

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## 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.



Rotate screen



Fit screen





## 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:



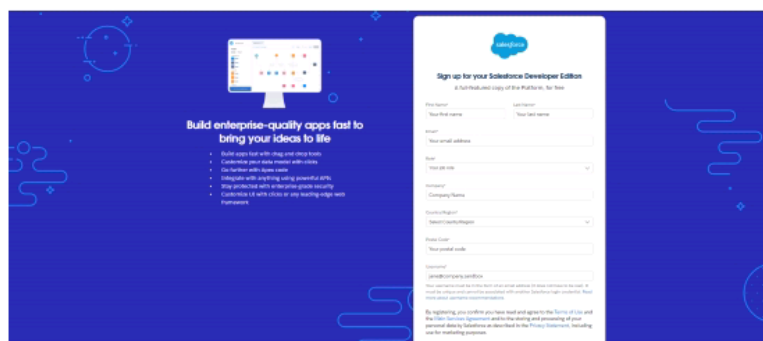
<https://youtu.be/r9EX3lGde5k>

### Activity1:

#### Creating a Salesforce Developer Org:

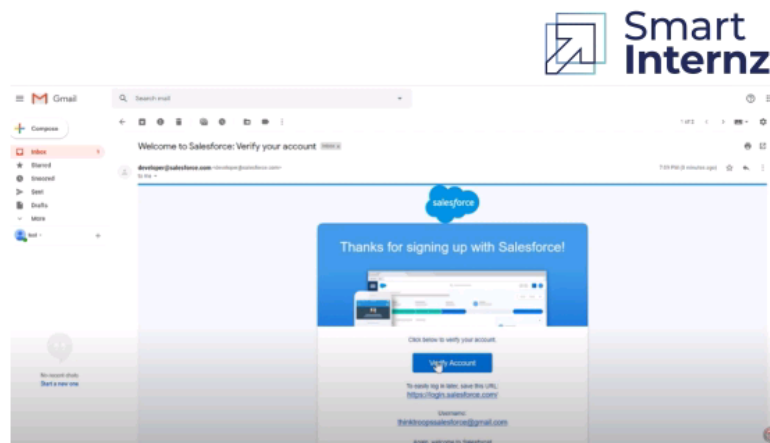
A Developer org has all the features and licenses you need to get started with Salesforce.

1. Search Developer.salesforce.com



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

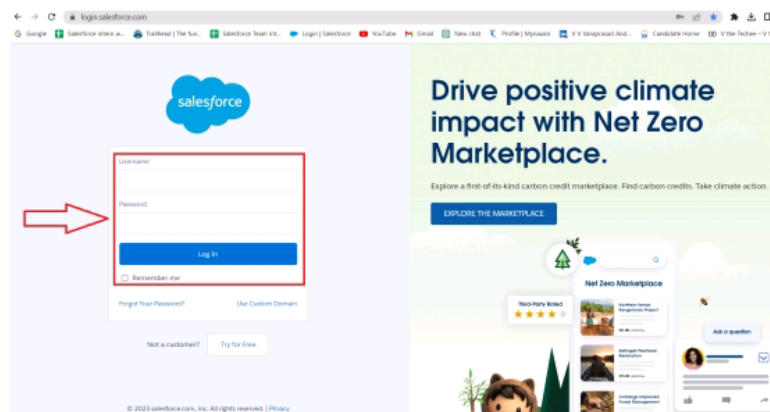
3. Click sign me up, after a few min you will receive a mail salesforce org and by using the verify account link you can create your new password.



4. Click save.

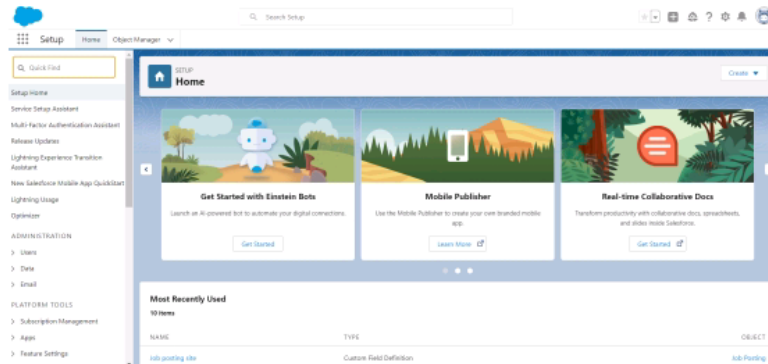
5. Search login.salesforce.com

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.

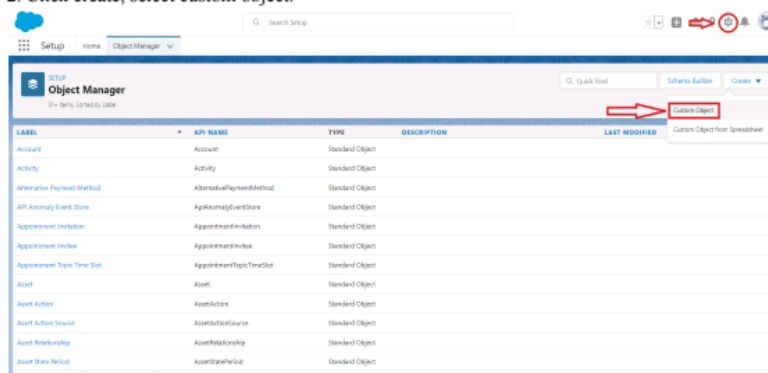


### **Activity 1:**

#### **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.



## &lt; Job\_Application\_Tracking\_...



Asset Action Source	AssetRelationship	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**  
New Custom Object

**Custom Object Definition Rule** [Next](#) [New & New](#) [Cancel](#)

**Custom Object Information**

The prefix and plural labels are used in table, page layouts, and reports.

Label:  Example: Account  
 Plural Label:  Example: Accounts  
 State with object created: ☐

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

Description:

Context Navigation Help Setting: ☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a Visualforce page

Context Name:

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, tabpages, 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:  Example: Account Name  
 Data Type:  Example: A (9999) (Std.Nr.200)  
 Display Format:   
 Starting Number:

**NEW**  
New Custom Object

**Optional Features**

☒ Allow Reports  
☐ Allow Activities  
☒ Track Field History  
☐ Allow 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 Widget after saving the custom object

[Save](#) [New & 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.



Object Manager						
101 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 Economy Event Store	ApiEconomyEventStore	Standard Object				
Appointment Invitation	AppointmentInvitation	Standard Object				
Appointment Invoice	AppointmentInvoice	Standard Object				
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object				
Asset	Asset	Standard Object				
Asset Action	AssetAction	Standard Object				
Asset Action Source	AssetActionSource	Standard Object				



SETUP - OBJECT MANAGER  
183 Items, Sorted by Label

Quick Find Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Assembly Event Store	ApiAssemblyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invoice	AppointmentInvoice	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 State Period	AssetStatePeriod	Standard Object			

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

Setup Home Object Manager

Search Setup

SETUP - OBJECT MANAGER  
Recruiter

Details

Fields & Relationships  
4 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		✓
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

Details

Fields & Relationships  
4 Items, Sorted by Field Label

Quick Find **NEW** Deleted Fields Field Dependencies Set History Tracking

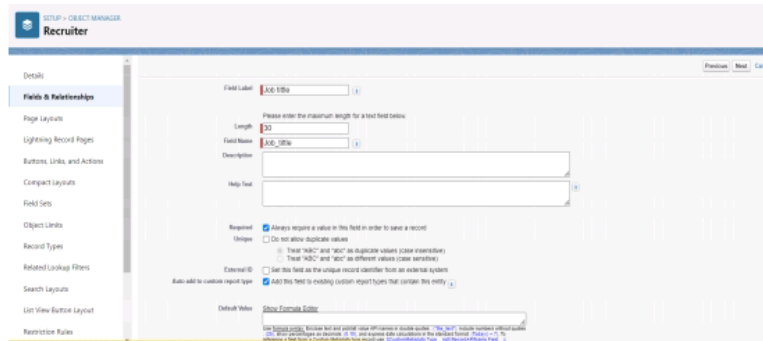
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Recruiter Number	Name	Auto Number		✓

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



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

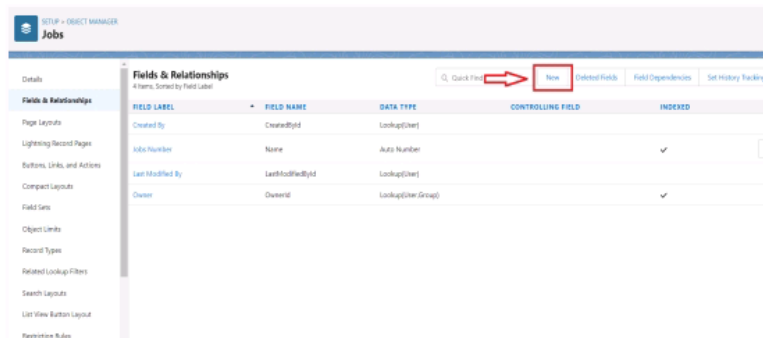
8. Select the page layouts that should include this field.

9. Click save.

### Activity 2:

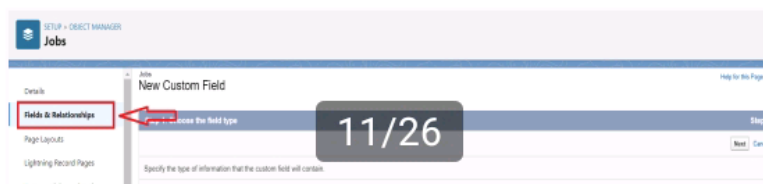
#### Creation of Master-detail relationship:

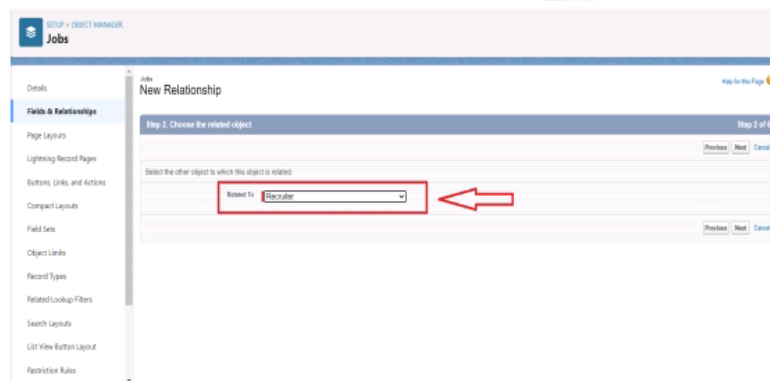
1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Jobs Number	Number	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**

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

Record Rules

Sharing Rules

Triggers

**NEW**

## New Relationship

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

Field Label

Field Name

Description

Help Text

Child Relationship Name

Sharing Settings

Select the additional access level required on the Master record to create, edit, or delete related Detail records.  
☒ 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 existing report type ☒ Add this field to existing custom report types that contain this entity.

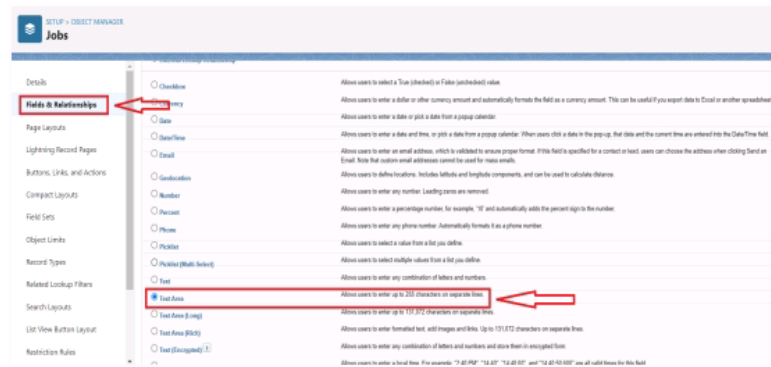
**Lookup Field**



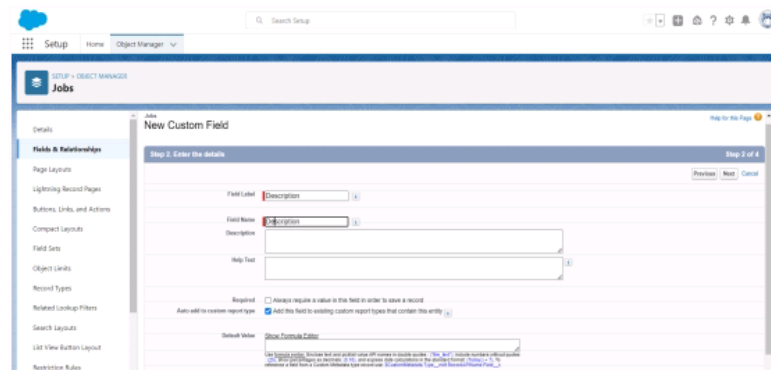
Smart  
Internz

**Create a new custom field:**

- 
- SETUP & OBJECT MANAGER
- Jobs
- Details
- Fields & Relationships**  
4 items, Sorted by Field Label
- Q, Quick Find **New** Deleted Fields Field Dependencies Set History Tracking
- | FIELD LABEL | FIELD NAME  | DATA TYPE    | CONTROLLING FIELD | INDEXED |
|-------------|-------------|--------------|-------------------|---------|
| Created By  | CreatedById | Lookup(User) |                   |         |
| Jobs Number | None        | Auto Number  |                   | ✓       |
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions



5. Enter the Field Label and field name click next



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.





The screenshot displays the Salesforce Lightning Design System (SLDS) documentation for the 'Fields & Relationships' component. The sidebar on the left contains navigation links such as 'Details', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Component Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', and 'Restriction Rules'. The main content area provides detailed information about various field types, including 'Overview', 'Text', 'Text Area', 'Text/Time', 'Email', 'GuidedSelect', 'Number', 'Percent', 'Phone', 'Picklist', 'Picklist (Multi-Select)', 'Text', 'Total', 'Text Area (Image)', 'Text Area (Grid)', and 'Text (Encrypted)'. A red box highlights the 'Fields & Relationships' link in the sidebar, and a red arrow points to the 'Total' field type description in the main content area.

**Fields & Relationships**

**Overview**

Allows users to select a Text (checked) or a Text (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you report data to Excel or another spreadsheet.

Allows users to enter a value or data from a group of options.

Allows users to enter a date and time, or pick a date from a group of values. When users click a date in this pop-up, the 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 the field is specified for a contact or lead, users can choose the address after clicking Send Email. Note that custom email addresses cannot be used for mass emails.

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

Allows users to enter a 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.

**Total**

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

Allows users to enter up to 30,000 characters on separate lines.

Allows users to enter formatted text, add images and links, Up to 13,137 characters on separate lines.

Allows users to enter any combination of letters and numbers and also those that are recognized from.

Allows users to enter a local time. For example, "7:45 PM", "12:00", and "12:00:00" are valid times for this field.

5. Enter the Field Label and field name click next

The screenshot shows the 'New Custom Field' setup page in Salesforce. The page is titled 'New Custom Field' and is part of the 'Setup > Object Manager' navigation. The left sidebar shows 'Details' and 'Fields & Relationships' sections. The main content area is 'Step 2: Enter the details', which includes fields for 'Field Label' (Description), 'Field Name' (description), and 'Help Text'. There are checkboxes for 'Required' and 'Always require a value in this field in order to save a record'. A 'Show Examples' link is at the bottom.

6. Click next and save.



Rotate screen



Play

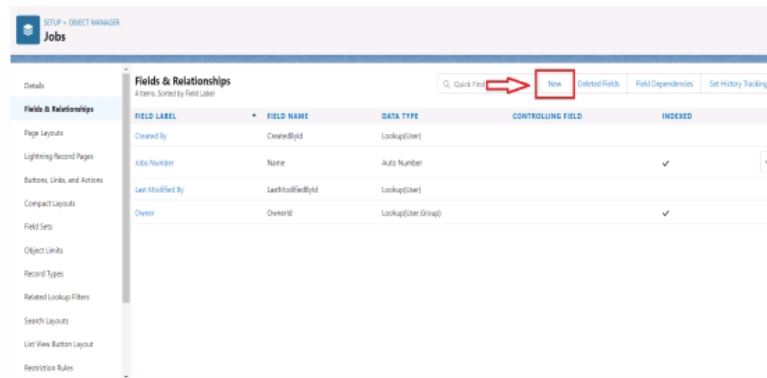


Thumbnail

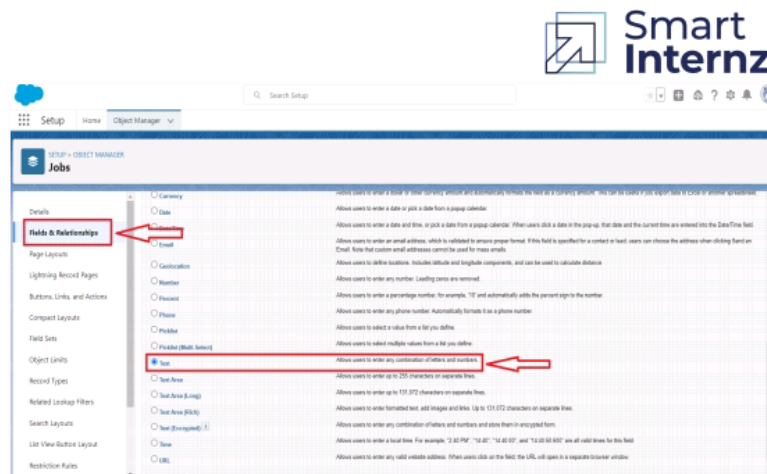


**Activity 4:****Create a new custom field:**

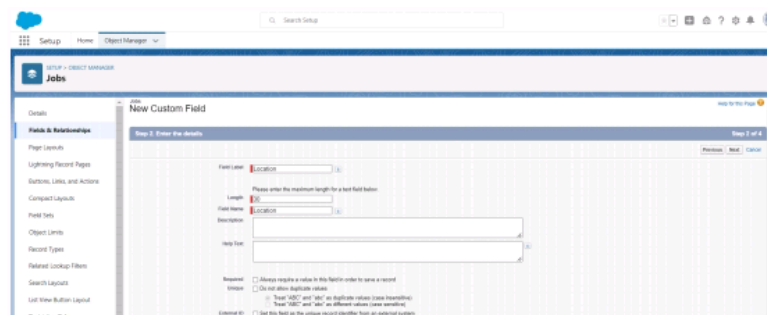
1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.

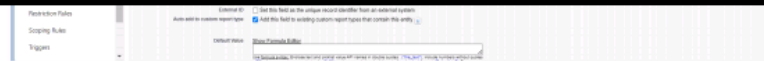


4. Choose the data type Text click next



5. Enter the Field Label and field name click next





6. Click next and save.



### Milestone 4-Tab:

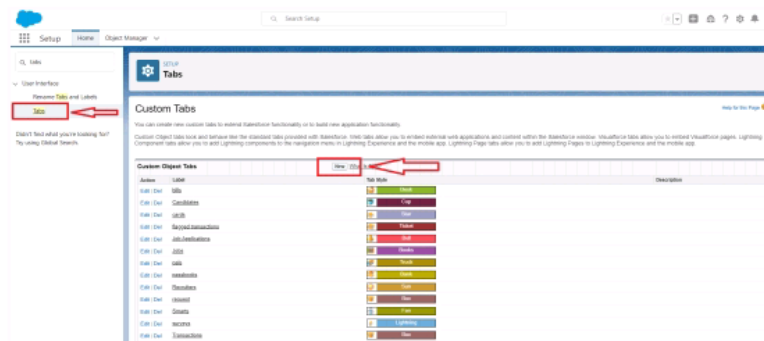
What is Tab?

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.

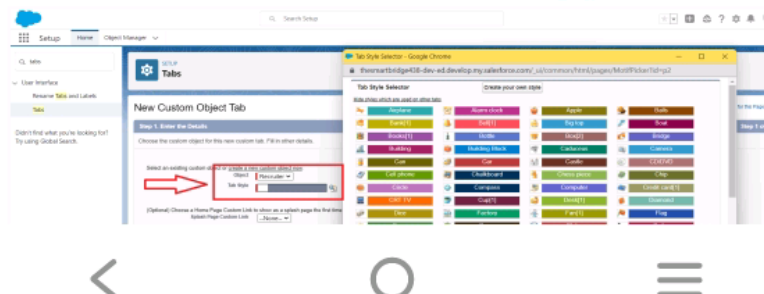
**Activity 1 :**

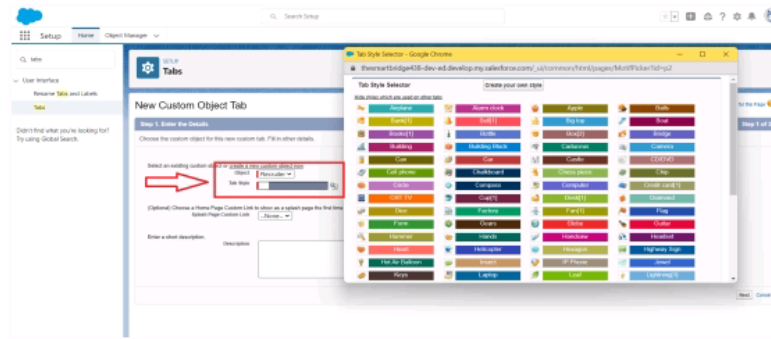
**Create a tab :**

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?

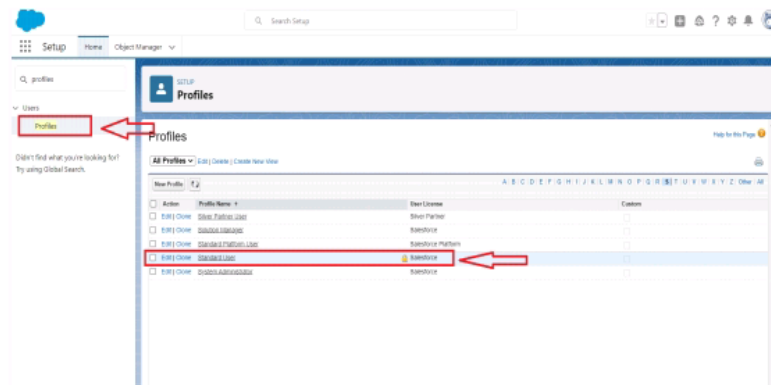
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

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

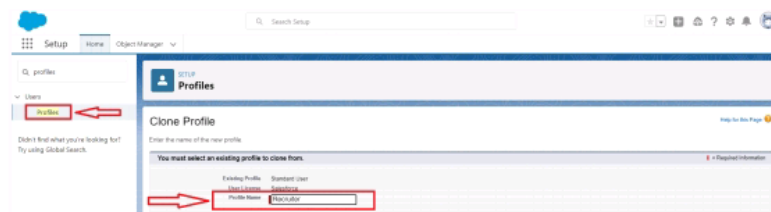
### Activity 1:

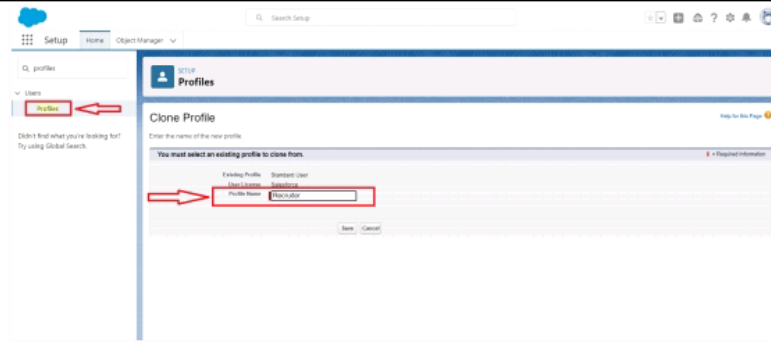
#### Create a custom profile :

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

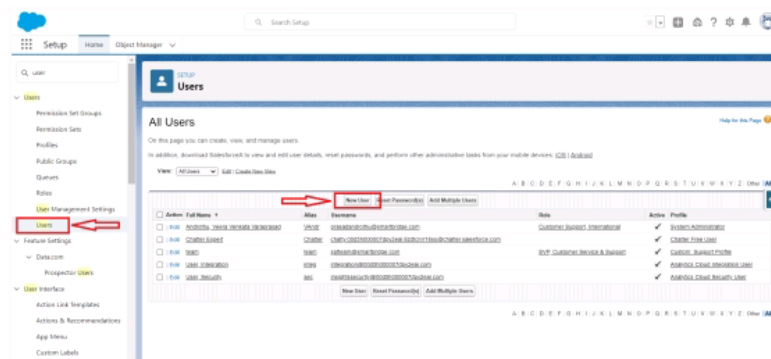
What is a user?

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,

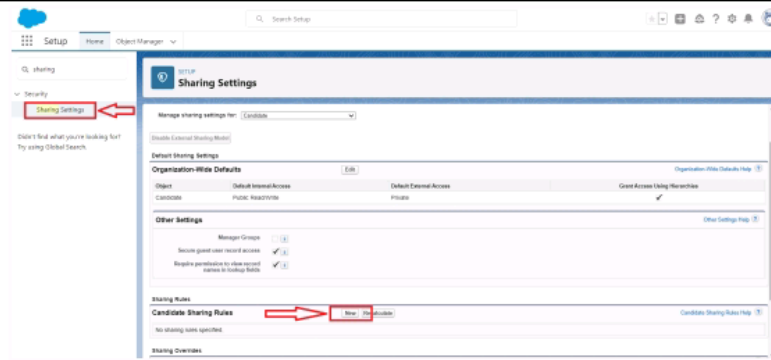
- Owner-based Sharing Rules
- Criteria-based Sharing Rules



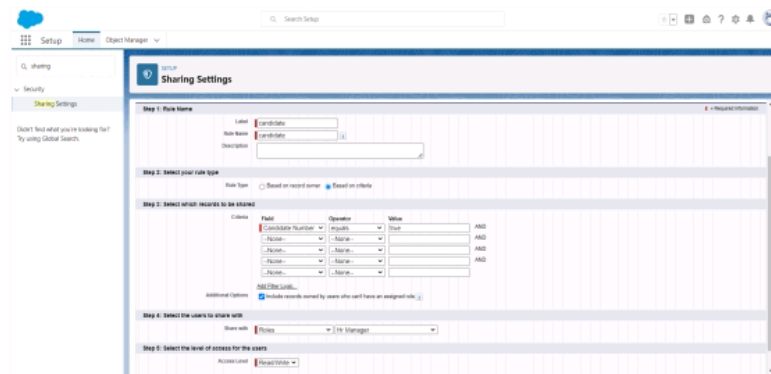
### Activity 1:

#### 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.



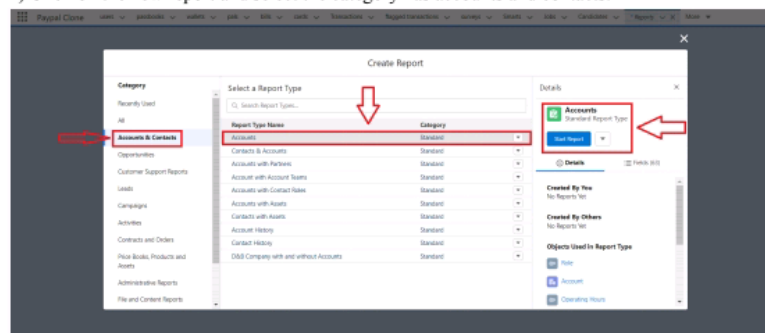
### Activity 1:

#### 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.

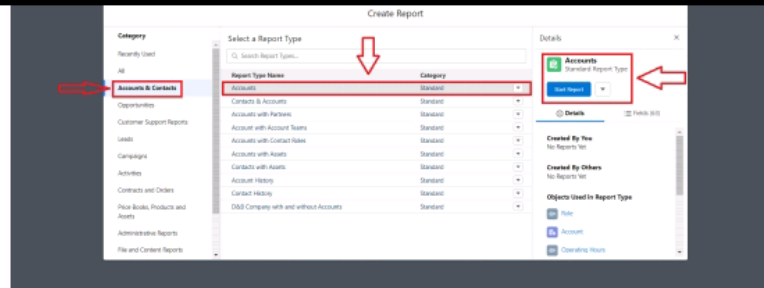
6) And All time is created.

7) In the outline pane, group rows select Rating and in group columns select Account Name.

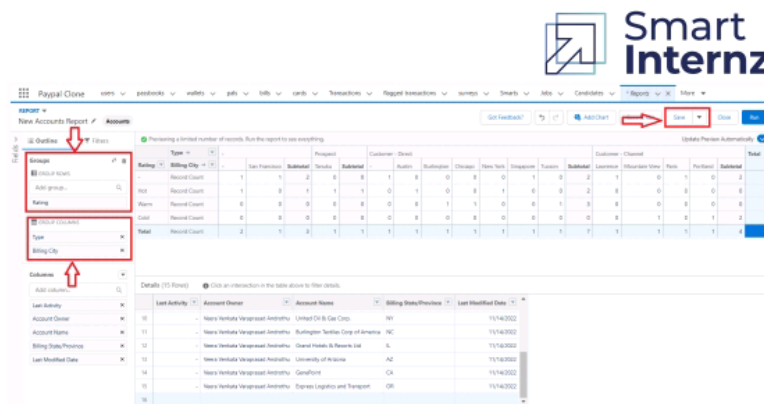
8) In the columns section add Type and Billing city.



Rating	Billing City	Account Name
1	San Francisco	Subtotal
2	San Francisco	Subtotal
3	San Francisco	Subtotal
4	San Francisco	Subtotal
5	San Francisco	Subtotal
6	San Francisco	Subtotal
7	San Francisco	Subtotal
8	San Francisco	Subtotal
9	San Francisco	Subtotal
10	San Francisco	Subtotal
11	San Francisco	Subtotal
12	San Francisco	Subtotal
13	San Francisco	Subtotal
14	San Francisco	Subtotal
15	San Francisco	Subtotal
16	San Francisco	Subtotal
17	San Francisco	Subtotal
18	San Francisco	Subtotal
19	San Francisco	Subtotal
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100	San Francisco	Subtotal



- 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.



- 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.



**Group Memo**

Take notes during your class while discussing with your group or in your own journal. Once all notes are taken, your group or you make notes in your own journal. It is recommended to begin the notes by writing down the main idea of the class and then to write down the notes in your journal.

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## Brainstorm

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

🕒 10 minutes

Muthugriya M

Identify your core problem	Research identified problem	Highlight your contribution to solution

Mamath M

Address identified problem statement	What is your unique solution	How does your solution address the problem statement

Mernakhi A

What is your core problem statement	Research identified problem	How does your solution address the problem statement

Person 5


Person 6


Person 7