



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

Generate as many ideas as you can think of that address the problem	Review ideas and select the best	Highlight one solution to present

Manav H S

Generate as many ideas as you can think of that address the problem	Review ideas and select the best	Highlight one solution to present

Hernakshi A

Generate as many ideas as you can think of that address the problem	Review ideas and select the best	Highlight one solution to present

Person 5

Person 6

Person 7

Group 43: 10/10/2018

Take the necessary steps to ensure that your business is protected from all risks. This includes taking out the right insurance, protecting your data, and ensuring that your business is compliant with all relevant laws and regulations. It's also important to have a disaster recovery plan in place, so you can get back up and running as quickly as possible in the event of a crisis.

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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:



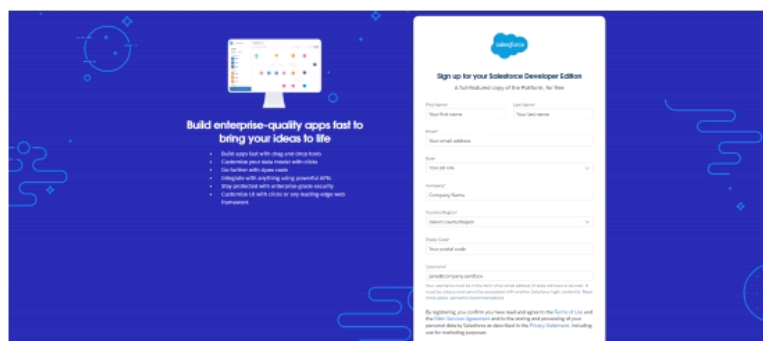
<https://youtu.be/r9EX3lGde5k>

Activity1:

Creating a Salesforce Developer Org:

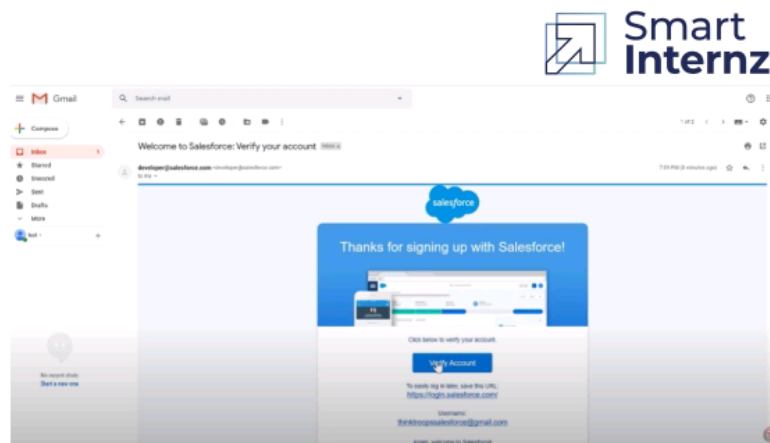
A Developer org has all the features and licenses you need to get started with Salesforce.

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.

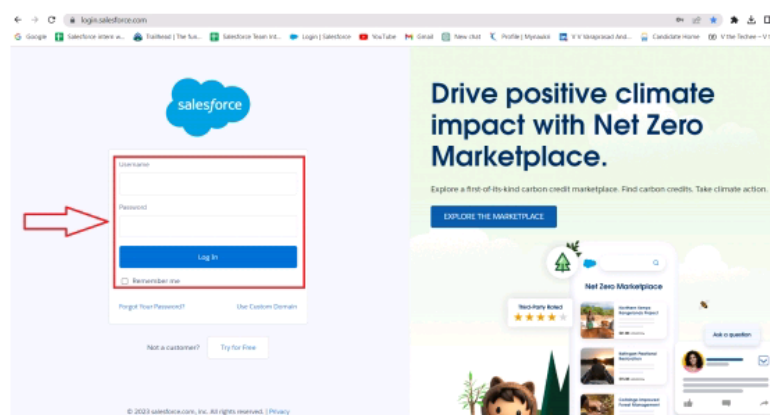
3. Click sign me up, after a few min you will receive a mail salesforce org and by using the verify account link you can create your new password.



4. Click save.

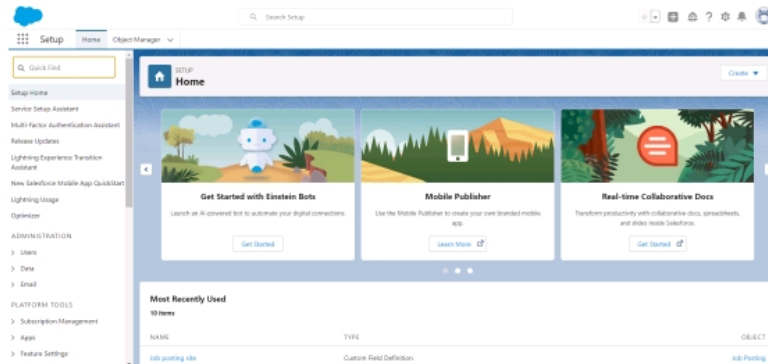
5. Search login.salesforce.com

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.

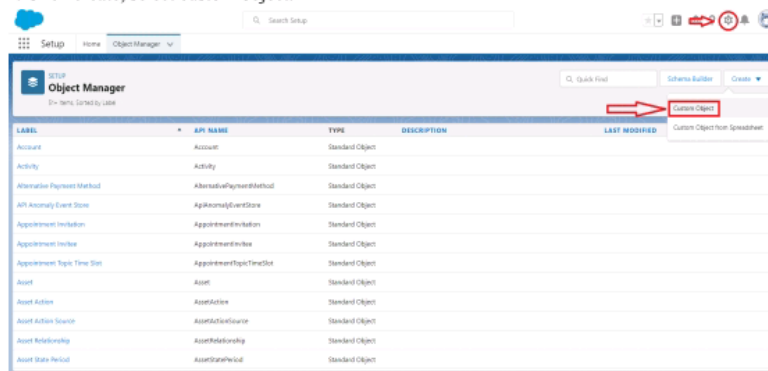


Activity 1:

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.



< 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, tooltips, 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 Streaming
☒ 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

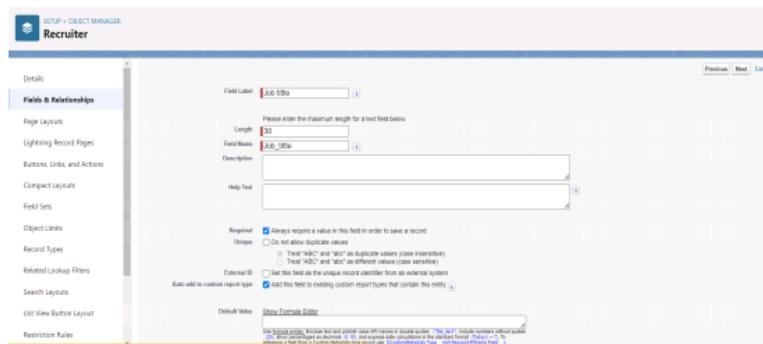
Quick Find **NEW** Deleted Fields Field Dependencies Set History Tracking

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

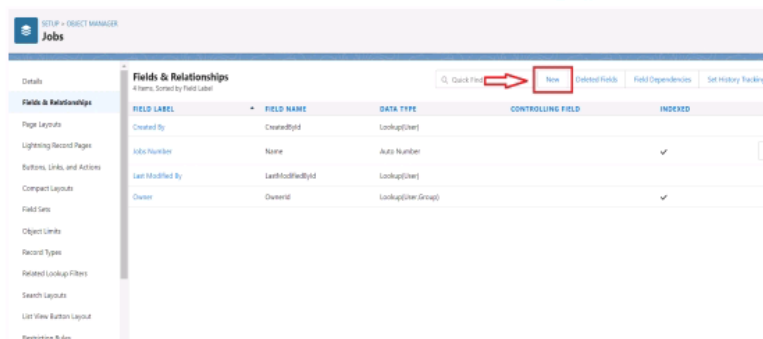
8. Select the page layouts that should include this field.

9. Click save.

Activity 2:

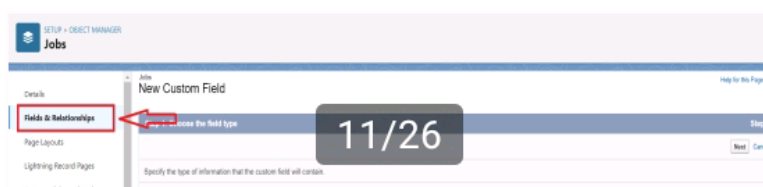
Creation of Master-detail relationship:

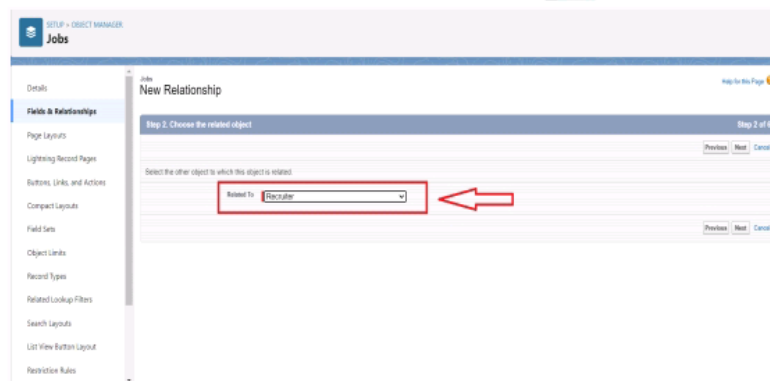
1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Jobs Number	Number	Auto Number		✓
Last Modified By	LastModifiedBy	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

Scoping 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 sharing 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.

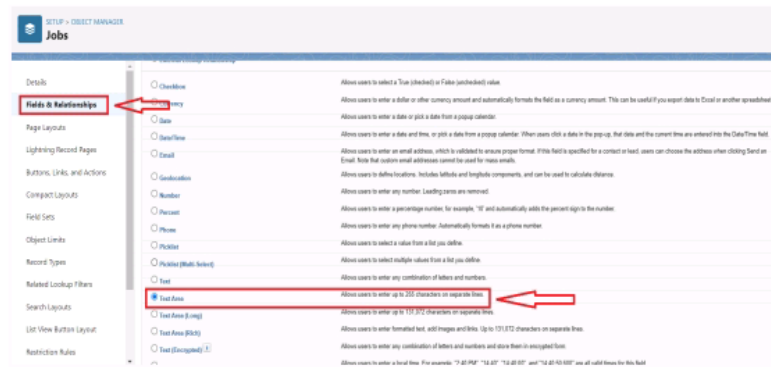
Lookup Field



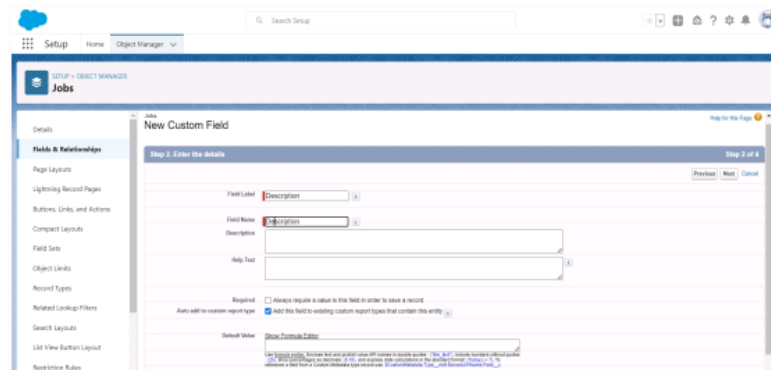
Smart
Internz

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:

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

16/26





SETUP > OBJECT MANAGER

Jobs

Fields & Relationships

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Checkbox

Currency

Date

Date/Time

Email

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted)

Allow users to select a True (checked) or False (unchecked) value.

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

Allow users to enter a date or pick a date from a popup calendar.

Allow 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.

Allow 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.

Allow users to define locations. Includes latitude and longitude components, and can be used to calculate distances.

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

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

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

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

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

Allow users to enter any combination of letters and numbers.

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

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

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

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

Allow users to enter a text area. For example: "10.00 PM", "10.00", "10.00.00" and "10.00.00.00" are all valid times for this field.

5. Enter the Field Label and field name click next

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Jobs

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

New Custom Field

Step 1: 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 types

Add this field to existing custom report types that contain this entity.

Default Value

Click Formula Editor

See System Limits, Knowledge base, and other setup information in System Limits. "Text Area" includes knowledge about custom fields and report types. "Text Area (Long)" includes knowledge about custom fields and report types. "Text (Encrypted)" includes knowledge about custom fields and report types.

6. Click next and save.



Rotate screen



Play

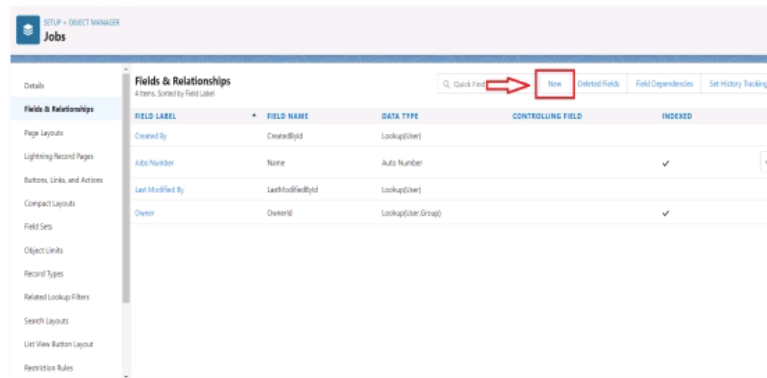


Thumbnail

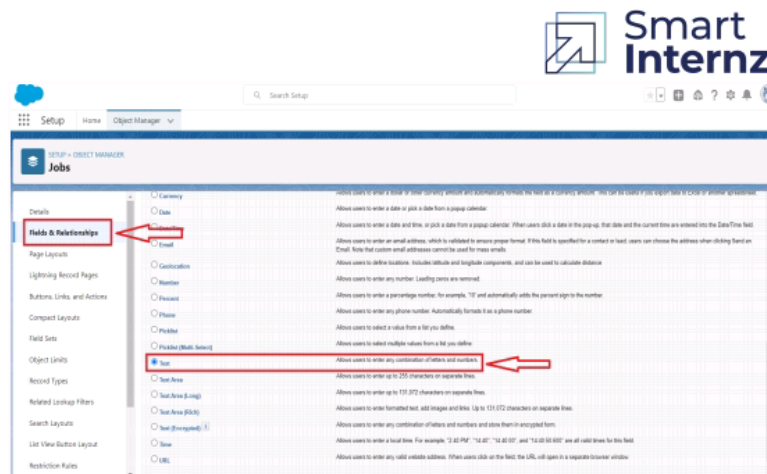


Activity 4:**Create a new custom field:**

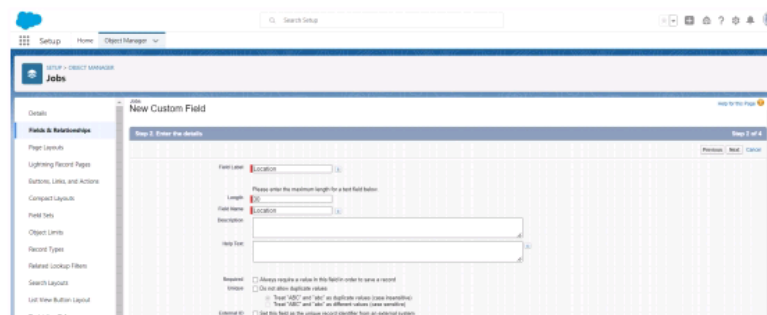
1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.



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:

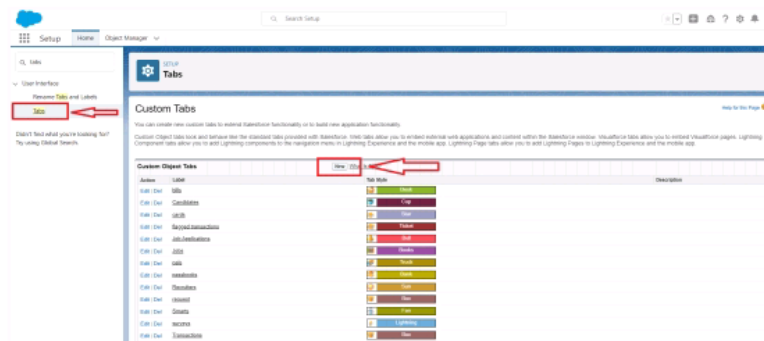
What is Tab?

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.

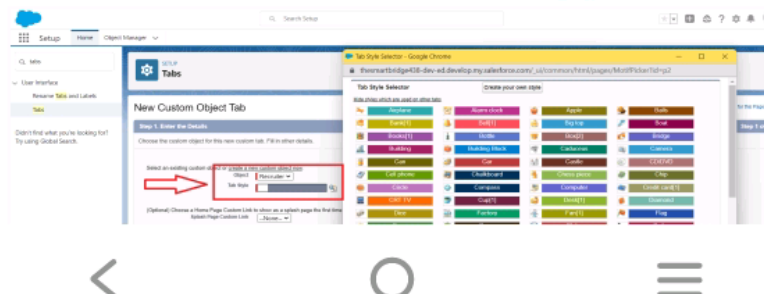
Activity 1 :

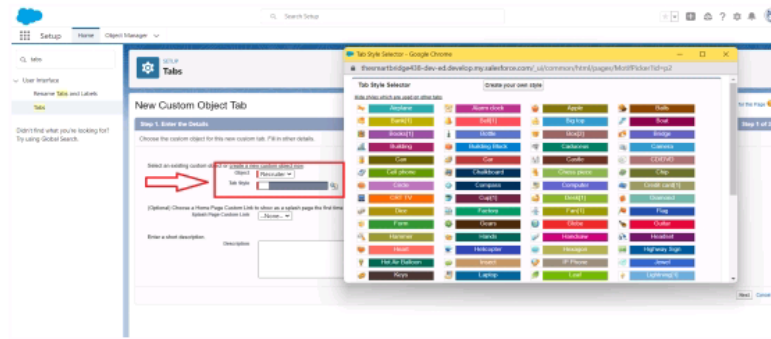
Create a tab :

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?

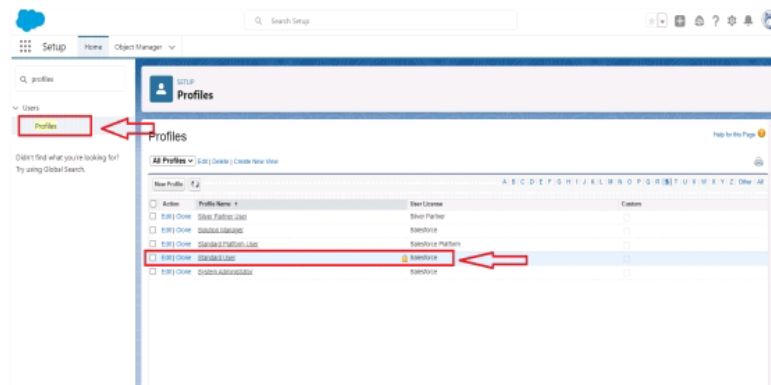
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

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

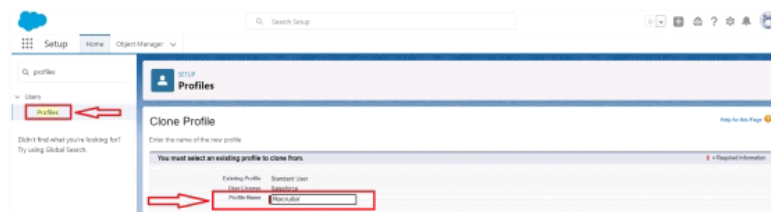
Activity 1:

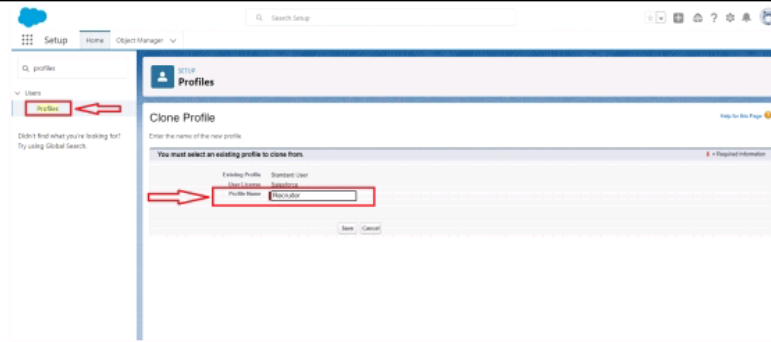
Create a custom profile :

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

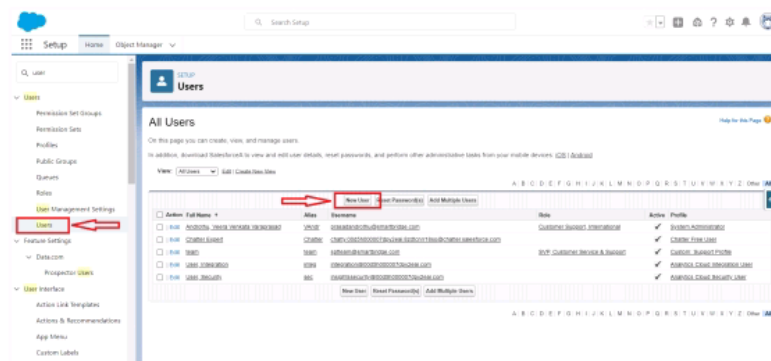
What is a user?

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.

Setup Home Object Manager

Search Setup

Sharing Settings

Manage sharing settings for: Candidate

Default Sharing Settings

Organization-Wide Defaults

Object	Default Internal Access	Default External Access	Grant Access Using Role/Role
Candidate	Public: Read/Write	Private	✓

Other Settings

Manager Groups

Secure guest user record access

Require permission to view record

Require permission to view record

Sharing Rules

Candidate Sharing Rules

No sharing rules specified

Sharing Overrides

- 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.



Setup Home Object Manager

Search Setup

Sharing Settings

Step 1: Pick Name

Label: Candidate

Rule Name: Candidate

Description:

Step 2: Select your rule type

Rule Type: ☐ Based on record owner ☒ Based on criteria

Step 3: Select which records to be shared

Column	Field	Operator	Value	AND/OR
	Candidate Number	is equal to	True	AND
	Phone	is equal to	True	AND
	Phone	is equal to	True	AND
	Phone	is equal to	True	AND

Additional Options

☒ Include records owned by users who are not assigned roles

Step 4: Select the users to share with

Share with: Roles

Step 5: Select the level of access for the users

Access Level: 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.

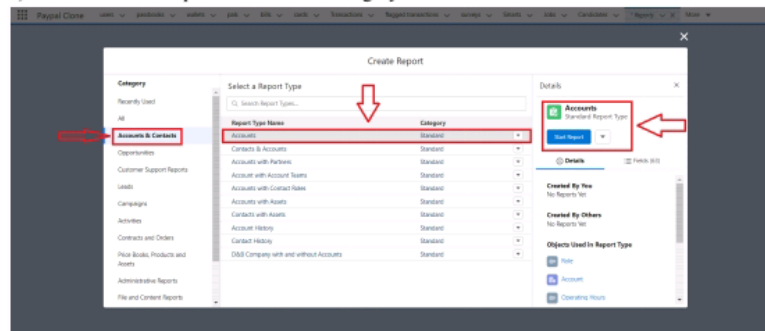


Activity 1:

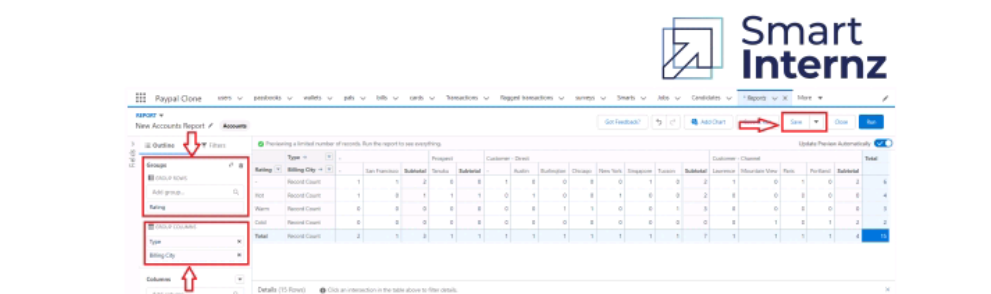
Create a report:

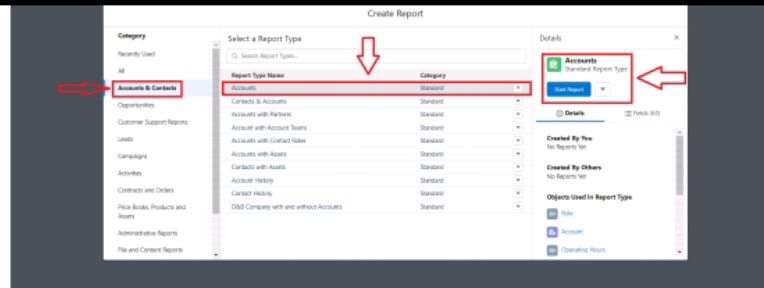
Create a report that displays rating of the account and which has type and account name.

- 1) Click on app launcher search for reports.
- 2) Click on the new report and select the category has accounts and contacts.

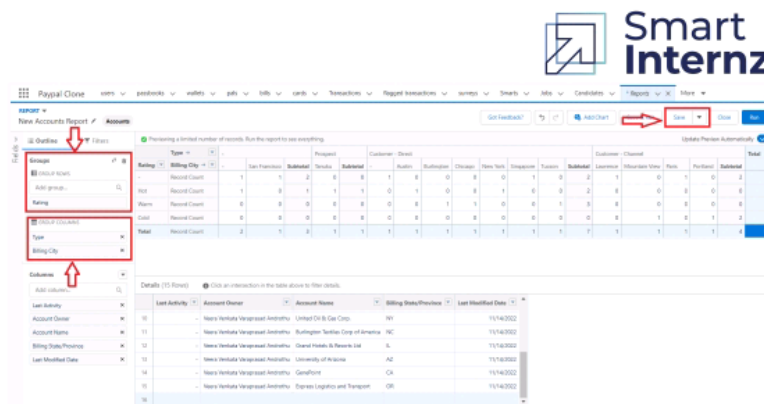


- 3) And the report type has accounts.
- 4) In the details section select the option start report.
- 5) In the filter pane select All accounts to show me.
- 6) And All time is created.
- 7) In the outline pane, group rows select Rating and in group columns select Account Name.
- 8) In the columns section add Type and Billing city.





- 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.



TRAILHEAD |

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