

## **PROJECT REPORT**

# **Recruiting Assistance For The HR Managers**

### **Description :**

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.

### **Creation Of Developer Org :**

- Click on sign up.
- Go to [developers.salesforce.com](https://developers.salesforce.com)
- On the sign-up form, enter the following details:
- First name & Last name : Shaik & Atheek
- Email : [atheekshaik181911@gmail.com](mailto:atheekshaik181911@gmail.com)
- Role: Developer
- Company: College Name : GYATRI DEGREE COLLEGE-TIRUPATI
- County: India
- Postal Code: pin code : 517101
- Username: [atheekshaik123@gmail.com](mailto:atheekshaik123@gmail.com)

<https://developer.salesforce.com/signup>

### **• Package Installation :**

1. Go to the Package Installation Link.
2. Select Install for Admins only

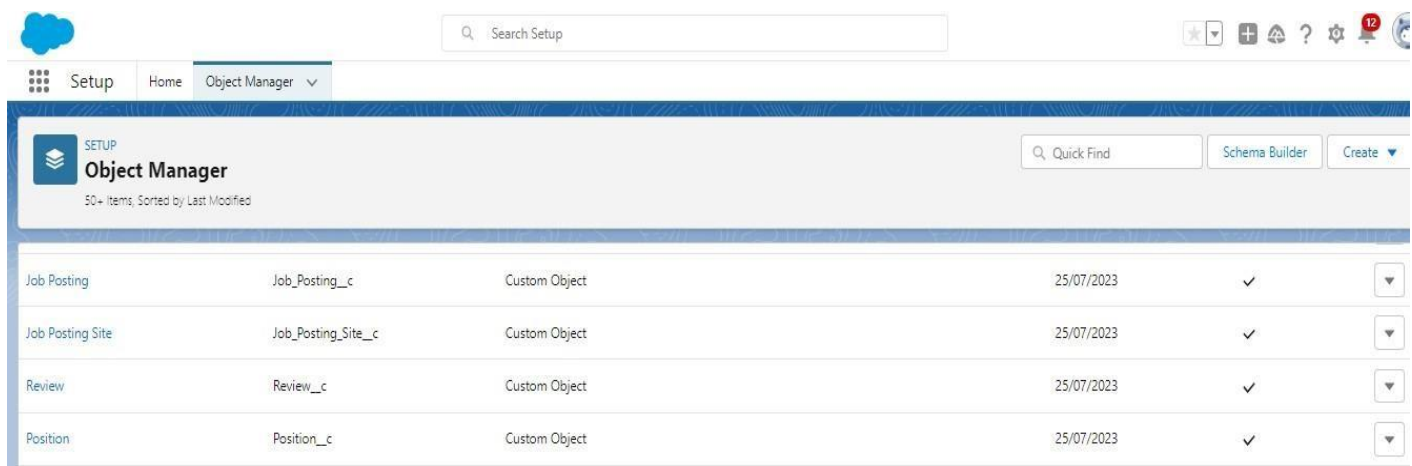
3. Click install.

## 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).

**Standard Object** : Account, Contact, Opportunity

**Custom Object** : Job Posting Site, Reviews, Junction object



The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. Below this, the 'Object Manager' section is displayed, showing a list of custom objects. The table has columns for the object name, API name, type, creation date, and status. The objects listed are 'Job Posting', 'Job Posting Site', 'Review', and 'Position', all of which are custom objects created on 25/07/2023.

Object Name	API Name	Type	Created	Status
Job Posting	Job_Posting__c	Custom Object	25/07/2023	✓
Job Posting Site	Job_Posting_Site__c	Custom Object	25/07/2023	✓
Review	Review__c	Custom Object	25/07/2023	✓
Position	Position__c	Custom Object	25/07/2023	✓

## Tabs :

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.

## Custom Tabs

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

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

Custom Object Tabs			
		New	What Is This?
Action	Label	Tab Style	Description
Edit   Del	Candidates	 People	
Edit   Del	Interviewers	 Hands	
Edit   Del	Job Applications	 Pencil	
Edit   Del	Job Postings	 Bank	
Edit   Del	Job Posting Sites	 Apple	
Edit   Del	Positions	 Gears	
Edit   Del	Reviews	 Balls	


  

Web Tabs			
		New	What Is This?

## Lightning App :

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.



1. click  to launch the App Launcher, then click Recruiting and follow the steps

2. Click the pencil icon at the top right of the screen.

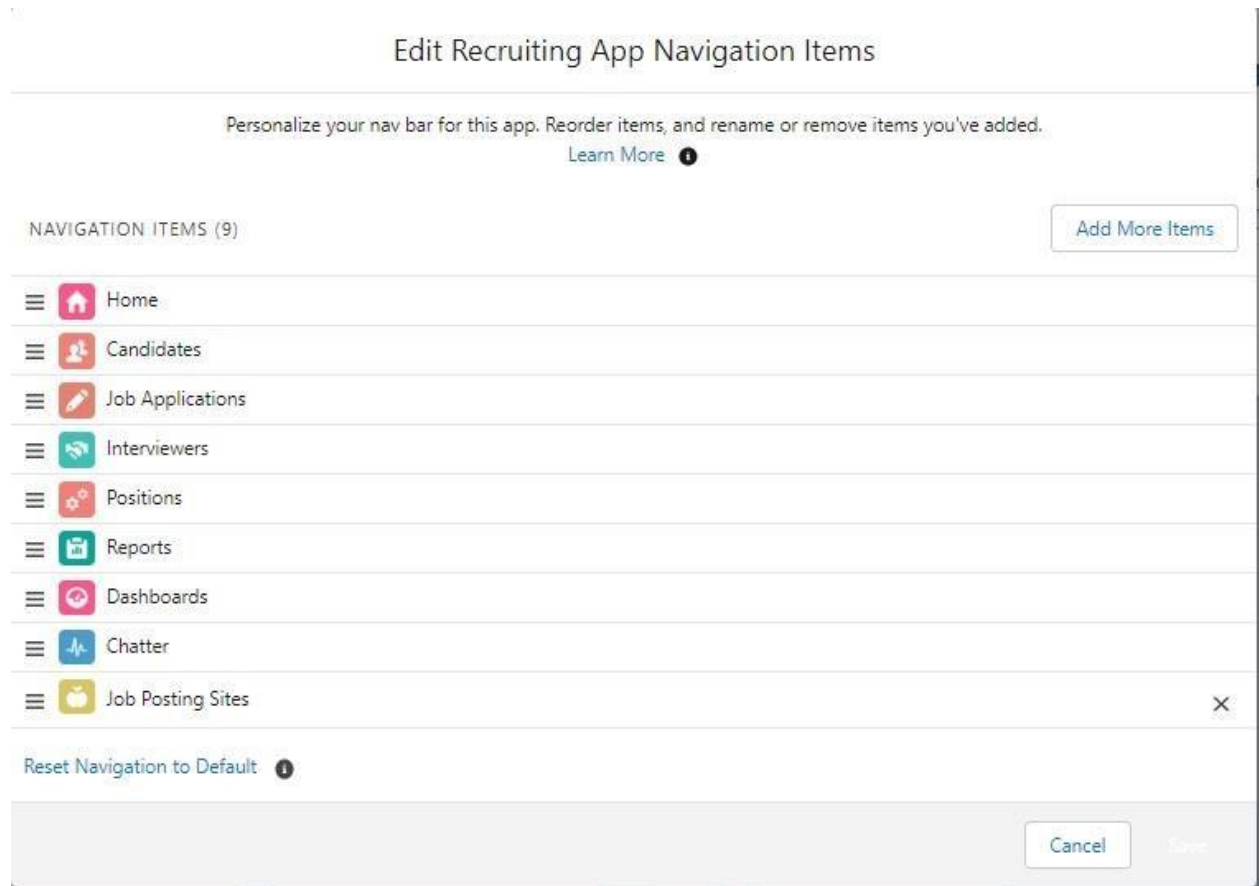
3. Click Add more Items.

4. From the menu on the left, click All.

5. Next to Job Posting Sites, click the +.

6. Click Add 1 Nav item.

7. Click Save.



## Fields And Relationships :

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.

- 1.Click the gear icon and select Setup. This launches Setup in a new tab.
- 2.Click the Object Manager tab next to Home.
- 3.Select job posting site.

4. Click Field & Relationship than click new.
5. Select the data type as URL.
6. Click Next.
7. For Field Label, enter the Job Posting Site URL.
8. Click Next, Next, and click Save & New

The screenshot displays the Salesforce Setup interface, specifically the 'Object Manager' section for the 'Job Posting Site' object. The interface is divided into a left sidebar with navigation options and a main content area. The 'Fields & Relationships' section is active, showing a table of fields for the object. The table has five columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (Lookup(User)), Description (Text Area(255)), Job Posting Site Name (Text(80)), Job Posting Site URL (URL(255)), Last Modified By (Lookup(User)), Owner (Lookup(User/Group)), Status (Picklist), and Technical Site (Checkbox). The 'Job Posting Site URL' field is highlighted in blue, indicating it is the current selection. The 'Review' section is also visible below the 'Fields & Relationships' section, showing a list of 13 items, including Core Competencies, Core Competencies Comments, Experience, Experience Comments, Interviewer, Job Application, Last Modified By, and Leadership Skills.

Setup > Object Manager

### Job Posting Site

Details

#### Fields & Relationships

8 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)		
Description	Description__c	Text Area(255)		
Job Posting Site Name	Name	Text(80)		✓
Job Posting Site URL	Job_Posting_Site_URL__c	URL(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Status	Status__c	Picklist		
Technical Site	Technical_Site__c	Checkbox		

Setup > Object Manager

### Review

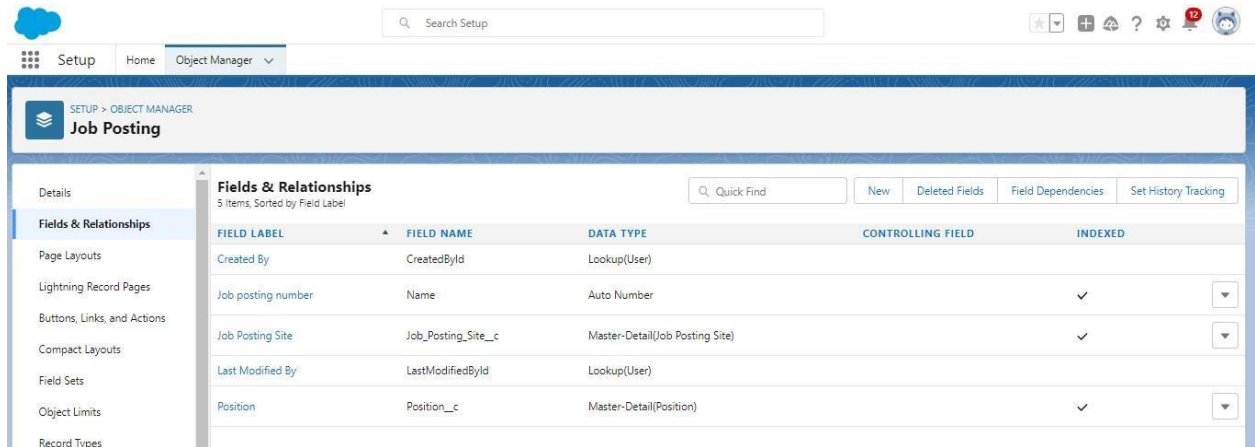
Details

#### Fields & Relationships

13 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Core Competencies	Core_Competencies__c	Picklist		
Core Competencies Comments	Core_Competencies_Comments__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Experience	Experience__c	Picklist		
Experience Comments	Experience_Comments__c	Text Area(255)		
Interviewer	Interviewer__c	Lookup(Interviewer)		✓
Job Application	Job_Application__c	Master-Detail(Job Application)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Leadership Skills	Leadership_Skills__c	Picklist		

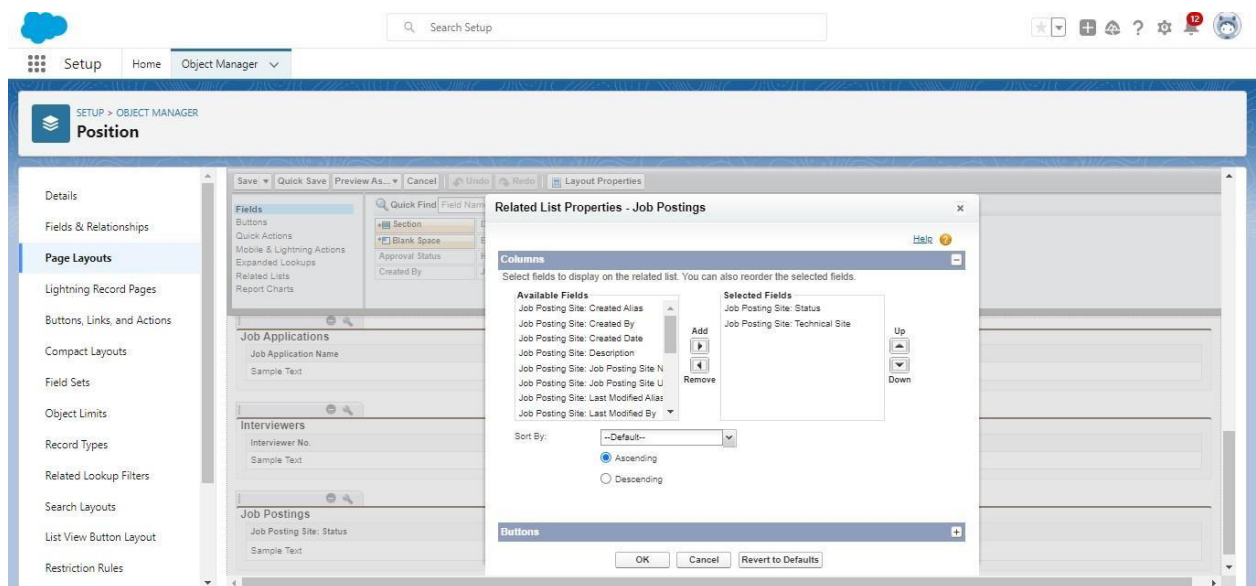
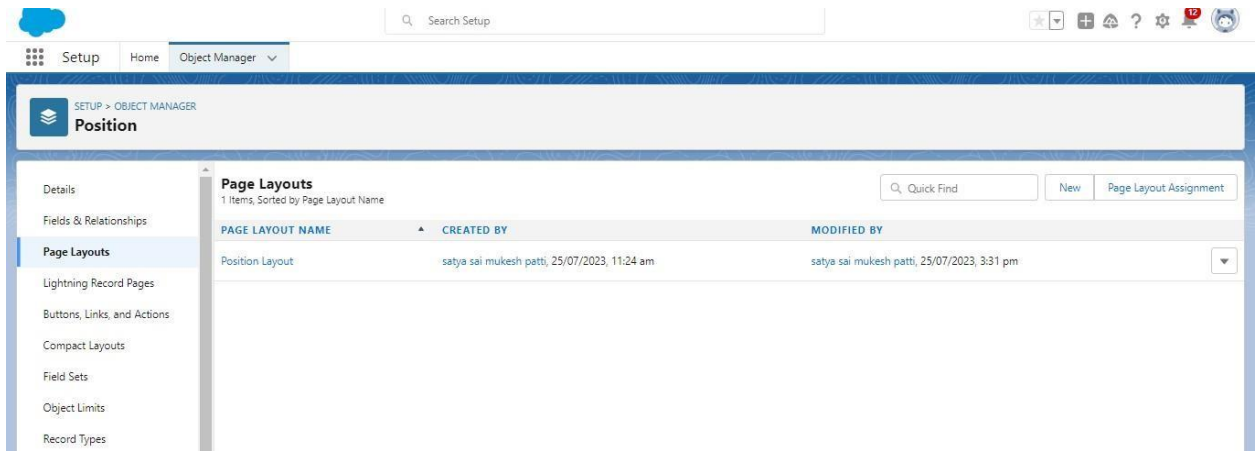


## Page Layout :

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.

## Modifying The Page Layouts :

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



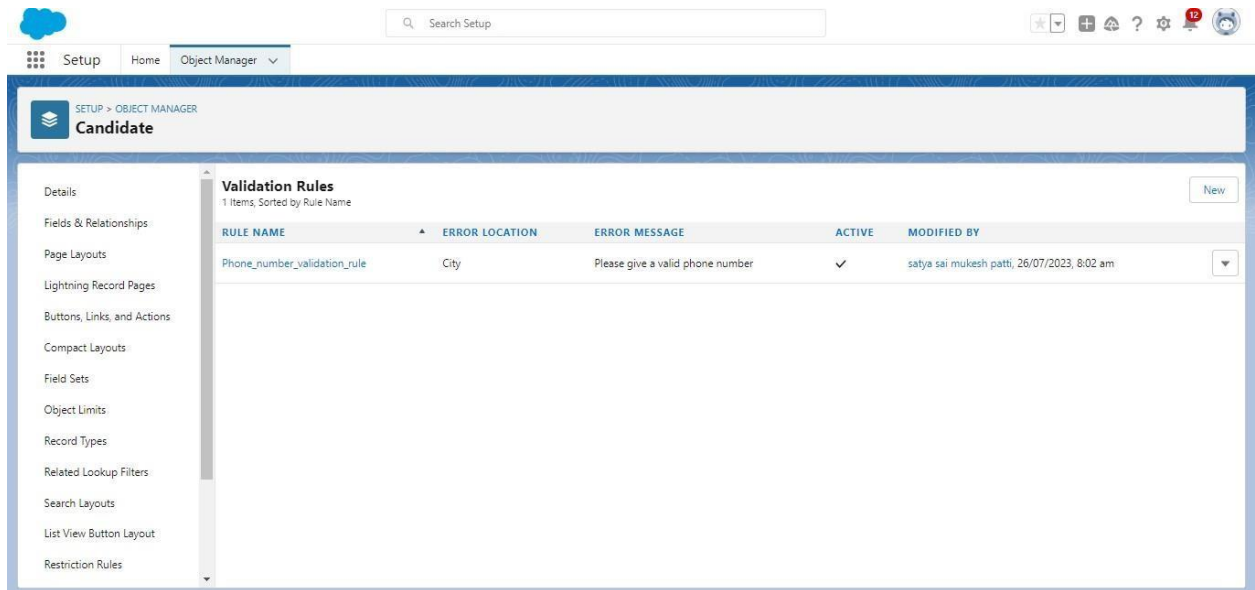
## Validations Rules :

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

## Creating A Validation Rule :

To create a validation rule:

Go to object manager, select the object Candidate, scroll down and click validation rule, New.

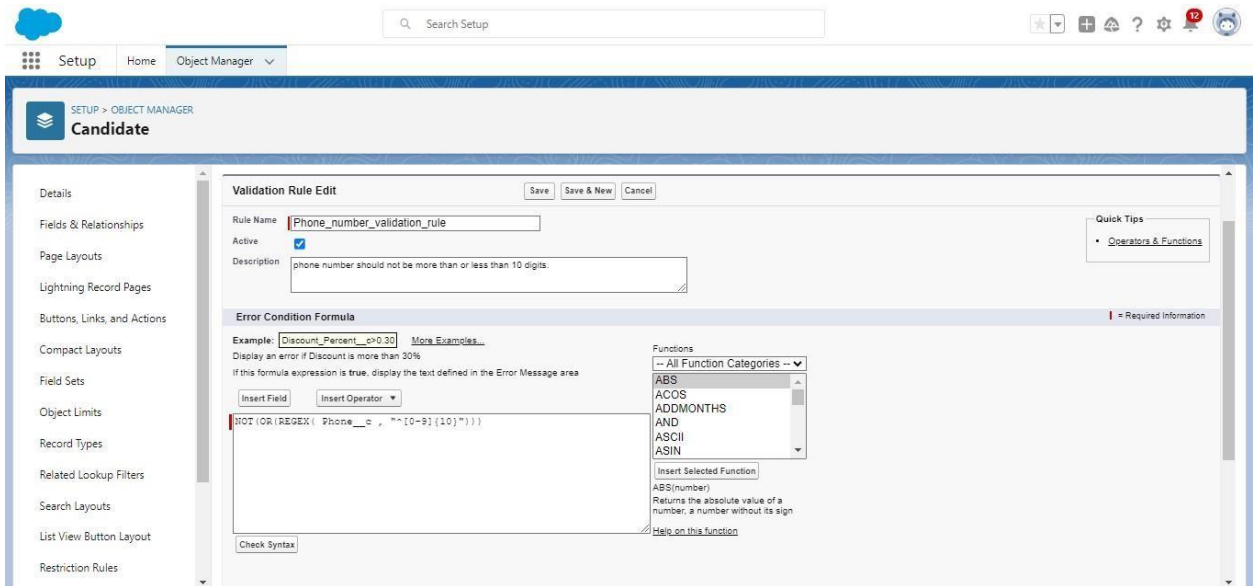


Give details as:

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  

$$\text{NOT}(\text{OR}(\text{REGEX}(\text{Phone c, } "[0-9]{10}")))$$
5. Using check syntax: check if the formula you entered is valid or not. Error Message: Please give a valid phone number
6. Error location: select field
7. Save





## Create A Validation Rule For Technical Site Checkbox Is Equal To True.

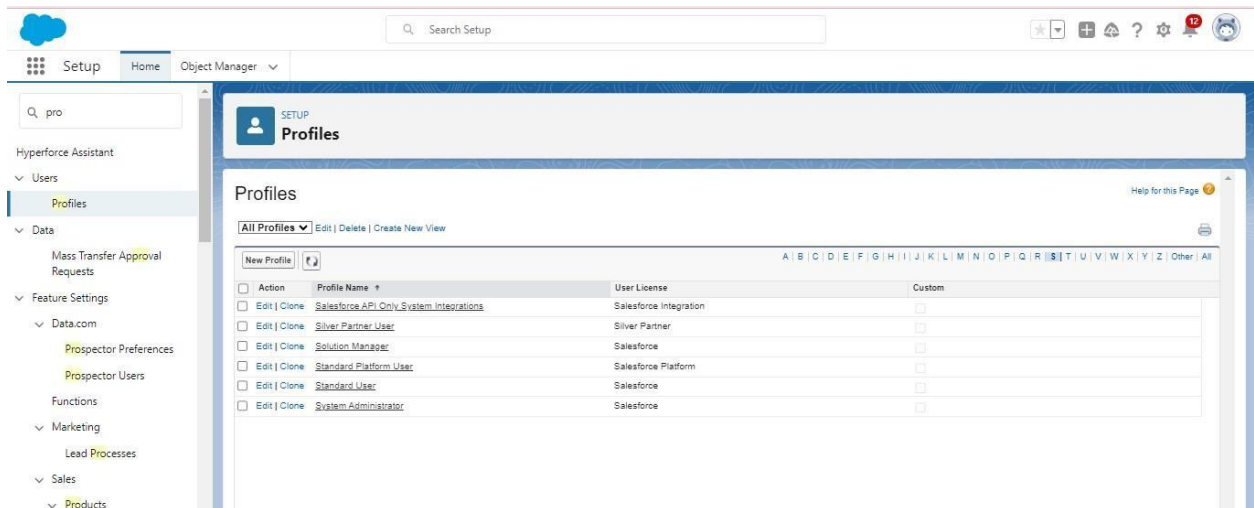
Go to object manager, select the object Job posting site, scroll down and click validation rule, New. Give details as:

1. Rule name: Technical site checkbox true.
2. Active: checked
3. Description: Technical site checkbox should be check.
4. Under Error Condition Formula: write the condition using insert field, insert operator, insert function      Technical\_Site c != TRUE
5. Using check syntax: check if the formula you entered is valid or not.
6. Error Message: Please select check box of technical site.
7. Error location: select field (Technical site).
8. Save. **Profile :**

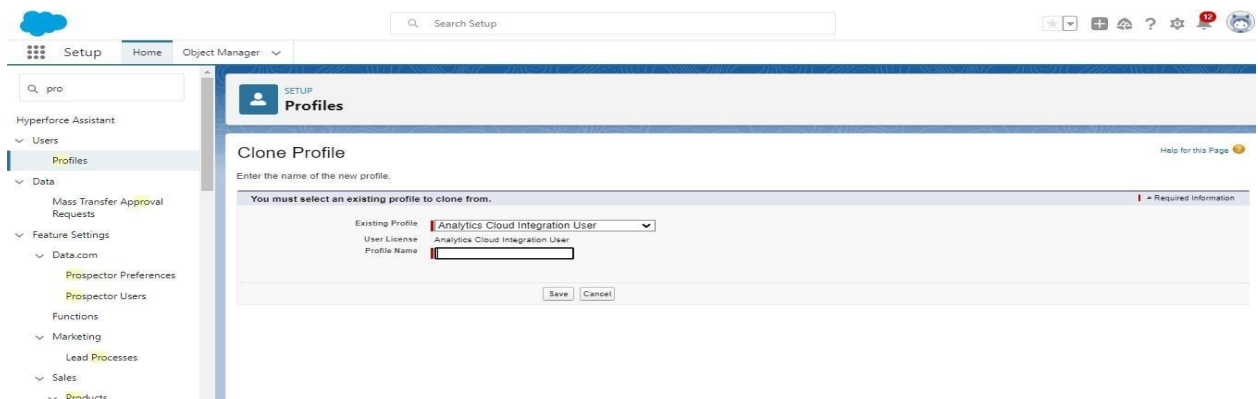
A profile is a group/collection of settings and permissions that define what a user can do insalesforce. A profile controls “Object permissions, Field permissions, User permissions, Tabsettings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.A profile can be assigned to many users, but user can be assigned single profile at a time.

# Creation On Profile :

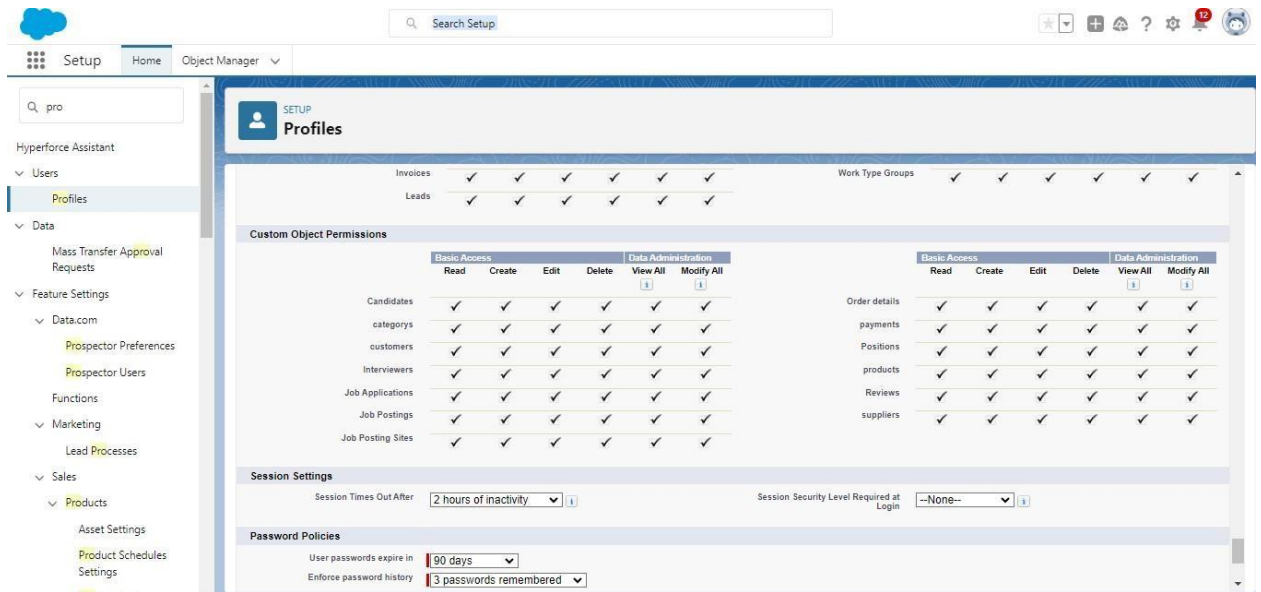
From Setup enter Profiles in the Quick Find box, and select Profiles.



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



5. While still on the Event profile page, then click Edit
- 6 Scroll down to Custom Object Permissions and Give view all access permissions to the Order details, supplier, product, customer, category, payment.



## User :

## Creating A User :

From setup type “users” in quick find and select users, then click New User.

- First Name: Sanjay
- Last Name: Gupta
- Alias: Sanj
- Email: provide your personal email id for future reference
- Username: [sanjaygupta@thesmartbridge.com](mailto:sanjaygupta@thesmartbridge.com)
- Nickname: Sanju
- Role: leave it as default
- User License: Salesforce
- Profile: Hr Profile

**Setup** Home Object Manager

Search Setup

Q user

- Users
  - Permission Set Groups
  - Permission Sets
  - Profiles
  - Public Groups
  - Queues
  - Roles
  - User Management Settings
  - Users**
- Feature Settings
  - Data.com
    - Prospector Users
  - User Interface
    - Action Link Templates
    - Actions & Recommendations
    - App Menu
    - Custom Labels

**SETUP Users**

All Users

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

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

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty00d5f00000c0d10eab10q0pmzads0@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Saranati, Abhilash	sara	ratimukesh@gmail.com		<input type="checkbox"/>	Interviewer
<input type="checkbox"/> Edit	Gurda, Sanjay	Sani	saniyay Gupta28@thesmartbridge.com		<input checked="" type="checkbox"/>	HR Profile
<input type="checkbox"/> Edit	ratni, satya sai mukesh	srati	ratnisaitya@odictivati.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5f00000c0d10eab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5f00000c0d10eab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

## Permission Set :

1.From setup search “permission sets” in quick find and select permission set then click on New

**Setup** Home Object Manager

Search Setup

Q perm

- Users
  - Permission Set Groups
  - Permission Sets**
- Custom Code
  - Custom Permissions

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

**SETUP Permission Sets**

Permission Sets

On this page you can create, view, and manage permission sets.

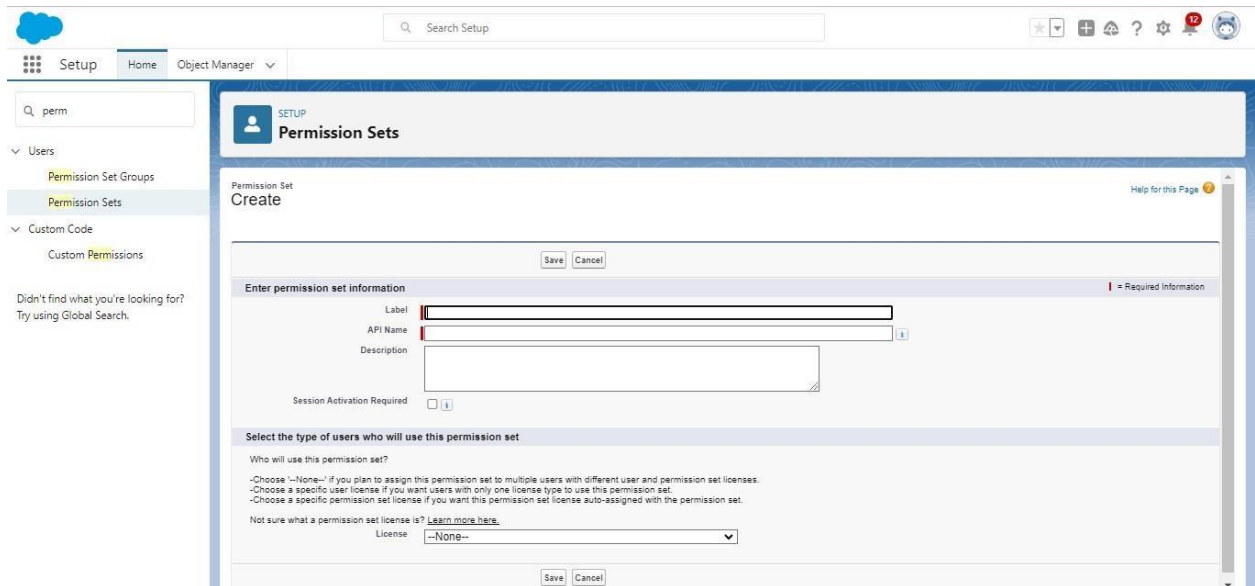
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and categories...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon C...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact center...	Service Cloud Voice User
<input type="checkbox"/> Del   Clone	Superior Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, q...	Facility Manager
<input type="checkbox"/> Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app...	Field Service Mobile

2.Enter label as: Hr Recruiter and Save.



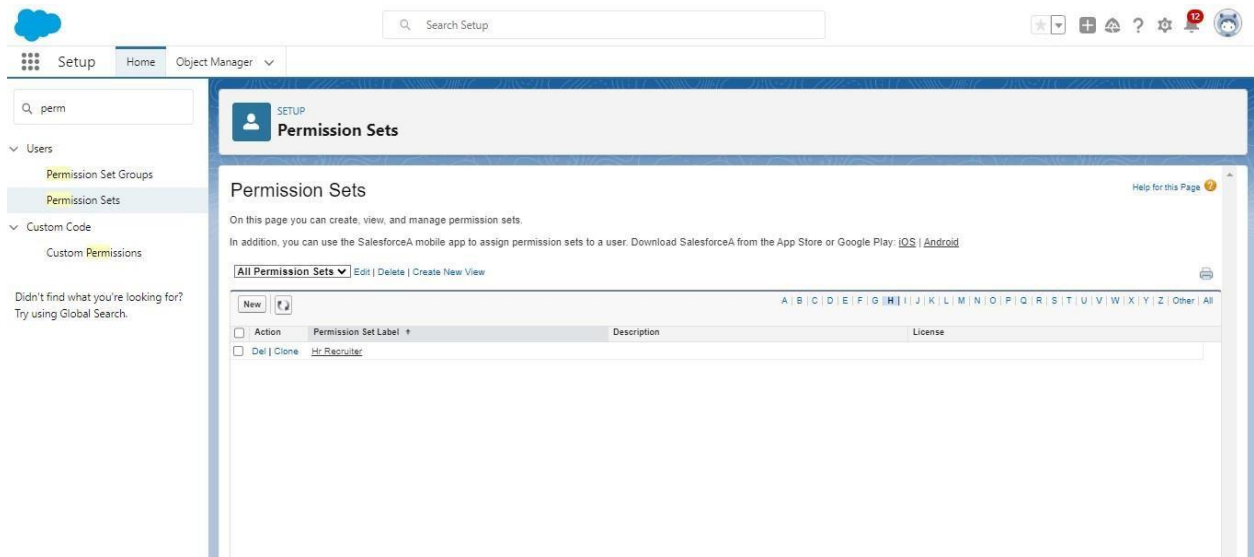
3. After saving the permission click on objects settings and search review object.

4. Click on edit and give Object permission (Edit) then save.

5. Click on the Manage assignment for assign a permission set to a particular user.

6. Now click on the Add Assignment

7. Now select the users and click on save.



## Create A Record (Positions) :

- Click on App Launcher on left side of screen.
- Search Recruiting & click on it.
- Click on Positions Tab.
- Click new and fill details & Save.

**New Position**

\* = Required Information

**Information**


\* Title   
Complete this field.

Status

Department

Approval Status

Location

Owner  satya sai mukesh patti

Hiring Manager

**Description**

Job Description

## View A Record(Positions) :

- Click on App Launcher on left side of screen.
- Search Recruiting & click on it.
- Click on Positions Tab.
- Click on any record name. you can see the details of the Positions

Recruiting Home Candidates Job Applications Interviewers **Positions** Reports Dashboards Chatter Job Posting Sites

**Positions** Recently Viewed ▾

2 Items • Updated a minute ago

	Title	
1	<input type="checkbox"/> Awesome sales rep	▾
2	<input type="checkbox"/> Super Sale Rep	▾

## Delete A Record (Positions) :

- Click on App Launcher on left side of screen.
- Search Recruiting & click on it.

- Click on Positions Tab.
- Click on Arrow at right hand side on that Particular record.
- Click delete and delete again.

## Reports :

1. From the Reports tab, click New Report.
2. Select the report type Job application with position for the report, and click Create.
3. Customize your report accordingly and include all fields, Reports needs to be Grouped by one field.(ex - Created by )(require to enable add chart) Then save (Job application with position) or run it.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Job application with position		Private Reports	satya sai mukesh patti	27/7/2023, 5:47 pm	
Created by Me	Job Posting Sites With Job Positions		Private Reports	satya sai mukesh patti	27/7/2023, 7:50 pm	
Private Reports						
Public Reports						

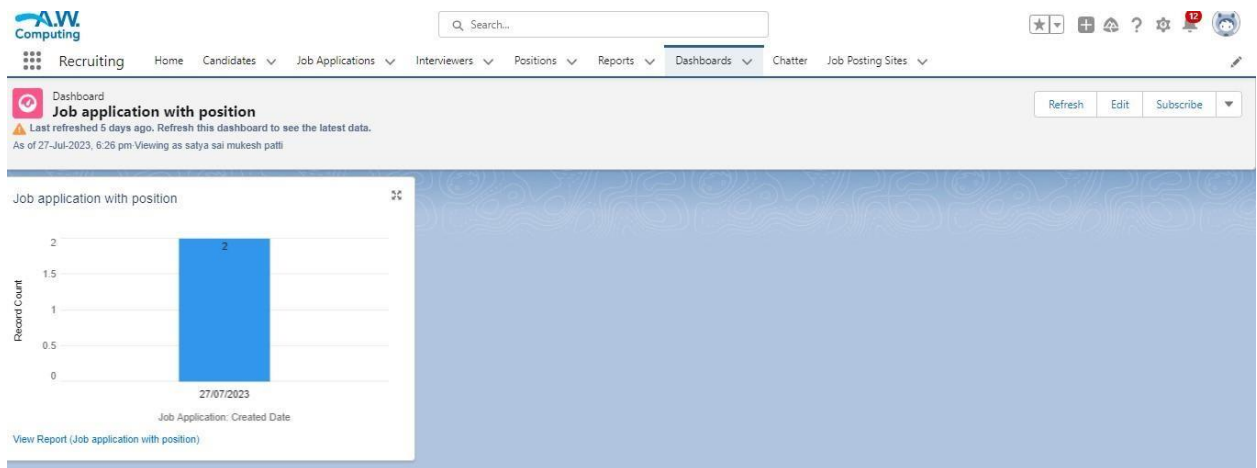
## Dashboard :

### Create A Dashboard :

1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name the dashboard Job application with position and click Create.
4. Click +Component.
5. Select Job application with position and click Select.



6. Select the Vertical Bar Chart component and click Add.
7. Click Save and then Done.



## View Report And Dashboard :

### Report :

- Click on App Launcher on left side of screen.
- Search Recruiting & click on it.
- Click on Reports Tab.
- Click on Job application with position & see records

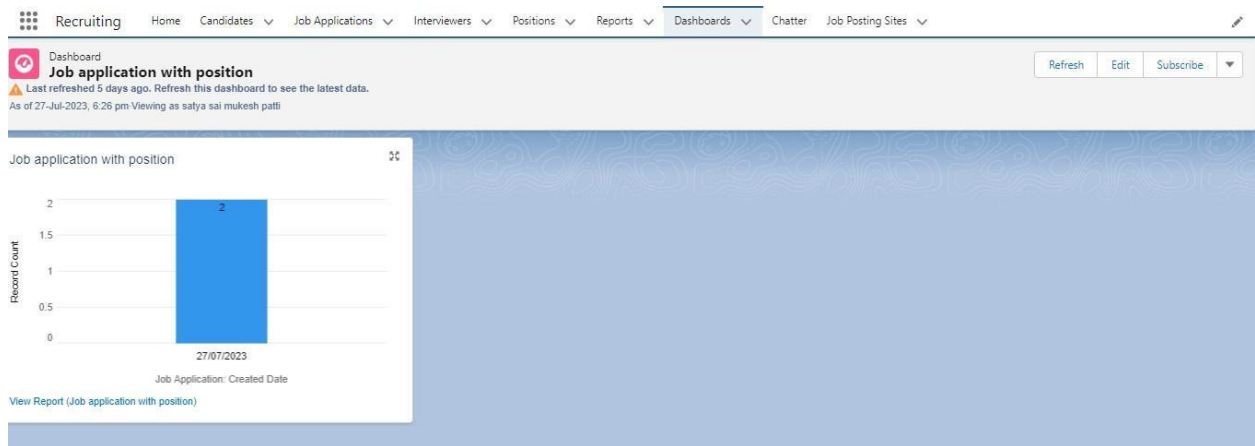
The screenshot shows the A.W. Computing Reports page. The top navigation bar is the same as the dashboard. The main menu has options like Recruiting, Home, Candidates, Job Applications, Interviewers, Positions, Reports, Dashboards, Chatter, and Job Posting Sites. The Reports page title is 'Reports'. Below the title, there's a search bar and buttons for 'New Report' and 'New Folder'. The table below shows the 'Recent' reports.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Job application with position		Private Reports	satya sai mukesh patti	27/7/2023, 5:47 pm	
Created by Me	Job Posting Sites With Job Positions		Private Reports	satya sai mukesh patti	27/7/2023, 7:50 pm	
Private Reports						
Public Reports						
All Reports						

### Dashboard :

- Click on App Launcher on left side of screen.
- Search Recruiting & click on it.
- Click on Dashboard Tab.

- Click on Job application with position & see records



< ----THE END ---- >