

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 :

- Search Developer.salesforce.com
- Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique
- 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.
- Click save.
- Search login.salesforce.com
- By using username and password you can login into the salesforce org

Package Installation :

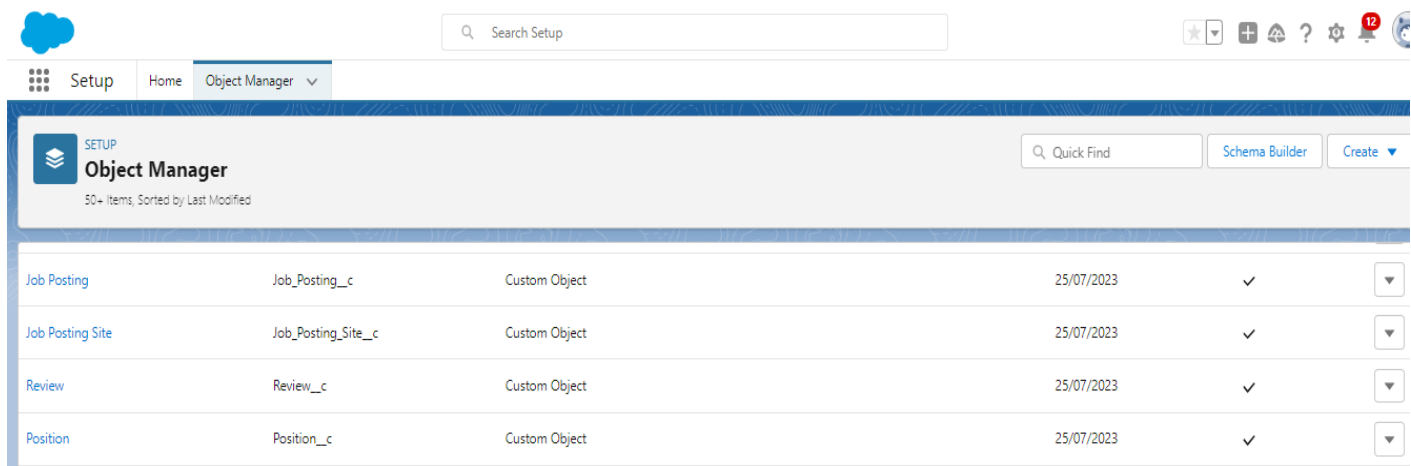
1. Go to the Package Installation Link.
2. Select Install for Admins only
3. Click install.

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 displays the Salesforce Object Manager interface. At the top, there is a navigation bar with tabs for Setup, Home, and Object Manager. A search bar labeled 'Search Setup' is also present. Below the navigation bar, the Object Manager section is titled 'Object Manager' with a sub-header '50+ Items, Sorted by Last Modified'. A table lists four custom objects:

Object Name	API Name	Object Type	Last Modified	Status	Actions
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 all Lightning Experience and the mobile app.


Custom Object Tabs			
		New	What Is This?
Action	Label	Tab Style	
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.

Edit Recruiting App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added. [Learn More](#) ⓘ

NAVIGATION ITEMS (9) [Add More Items](#)

- ≡ Home
- ≡ Candidates
- ≡ Job Applications
- ≡ Interviewers
- ≡ Positions
- ≡ Reports
- ≡ Dashboards
- ≡ Chatter
- ≡ Job Posting Sites ×

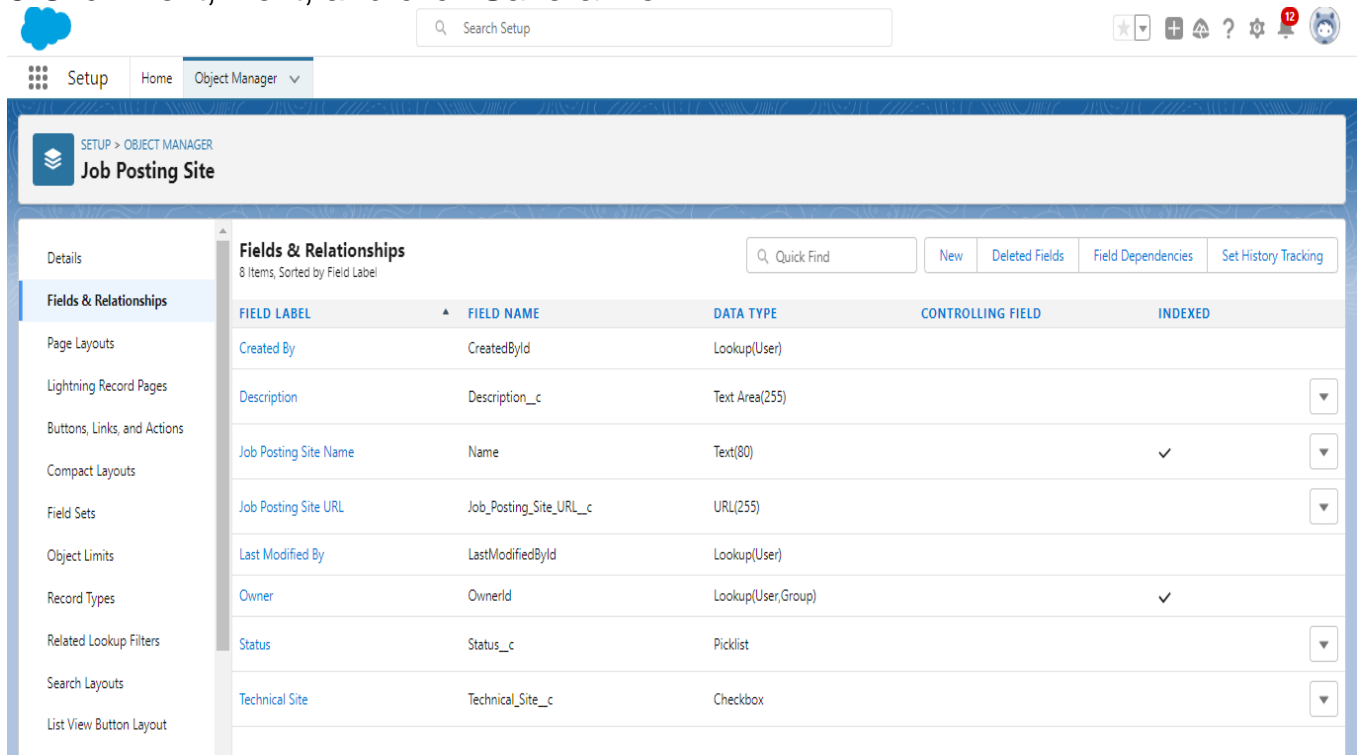
[Reset Navigation to Default](#) ⓘ

[Cancel](#) [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 shows the Salesforce Setup interface. At the top, there is a navigation bar with tabs for Setup, Home, and Object Manager. A search bar labeled 'Search Setup' is also present. Below the navigation bar, the 'Object Manager' tab is selected, and the 'Job Posting Site' object is chosen. The left sidebar contains a list of categories: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays the 'Fields & Relationships' section for the 'Job Posting Site' object, showing 8 items sorted by Field Label. The table lists the following fields:

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

Q 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		

Setup Home Object Manager

SETUP > OBJECT MANAGER

Job Posting

Details

Fields & Relationships

5 Items, Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies Set History Tracking

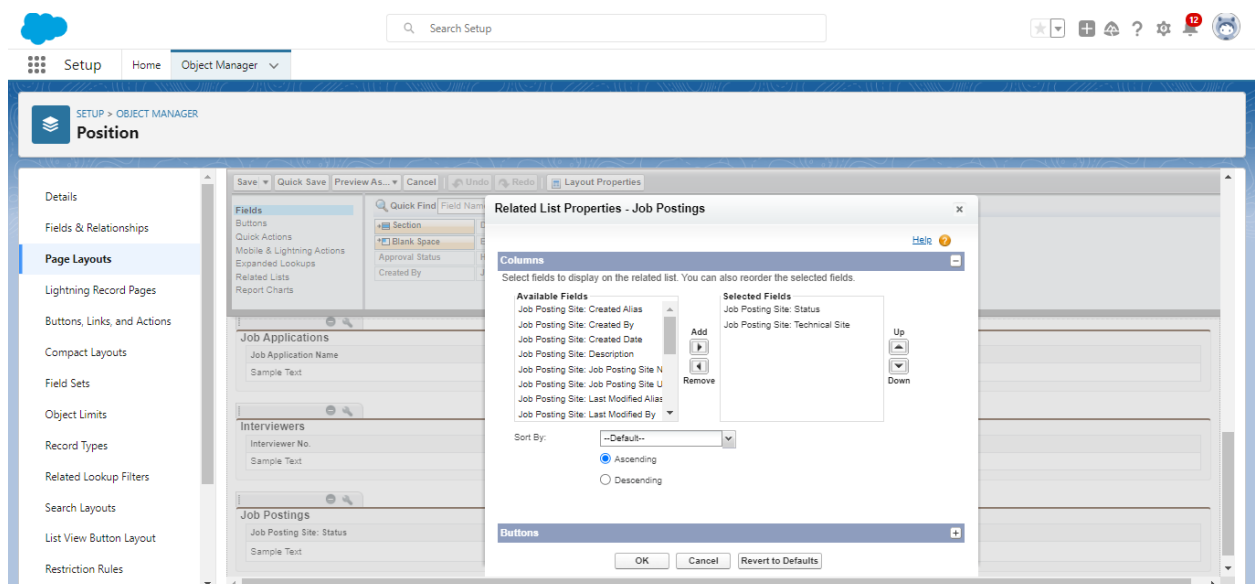
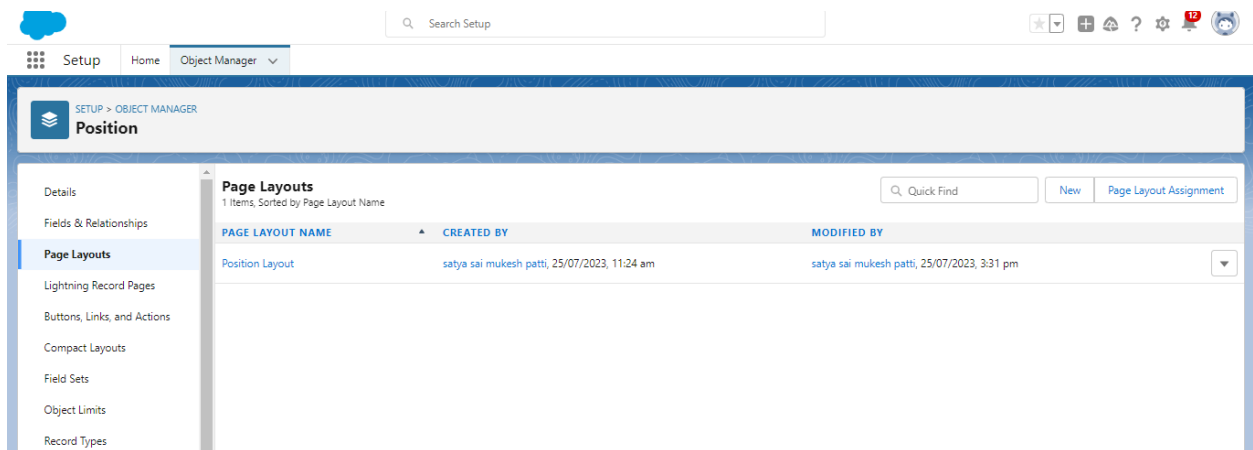
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Job posting number	Name	Auto Number		✓
Job Posting Site	Job_Posting_Site__c	Master-Detail(Job Posting Site)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Position	Position__c	Master-Detail(Position)		✓

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



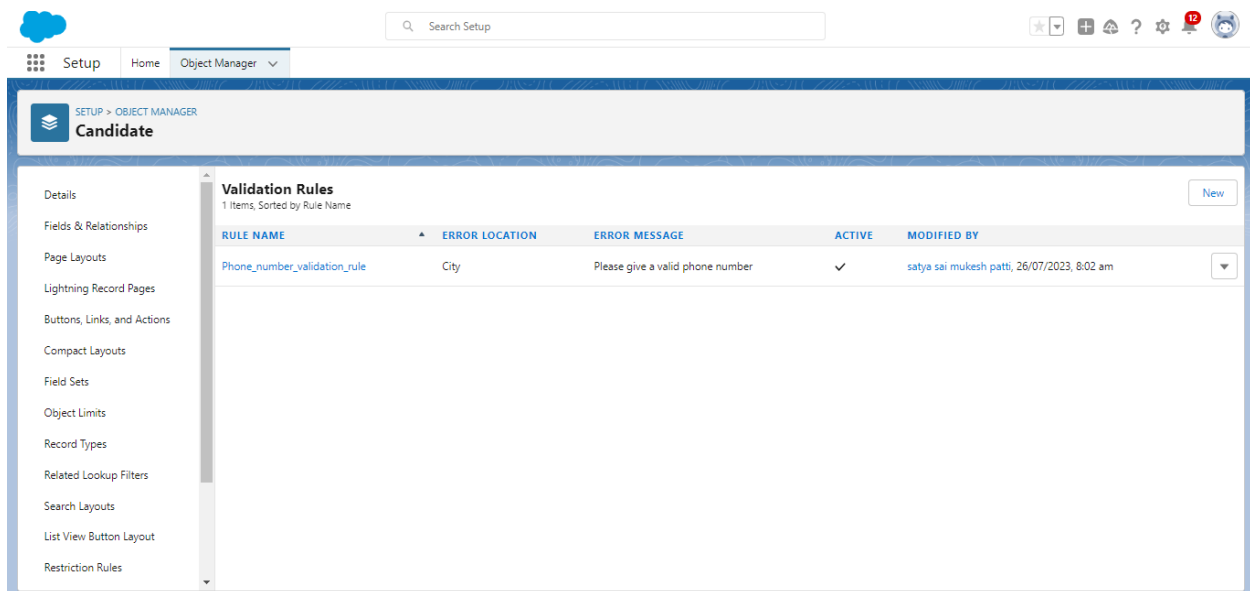
Validations Rules :

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,

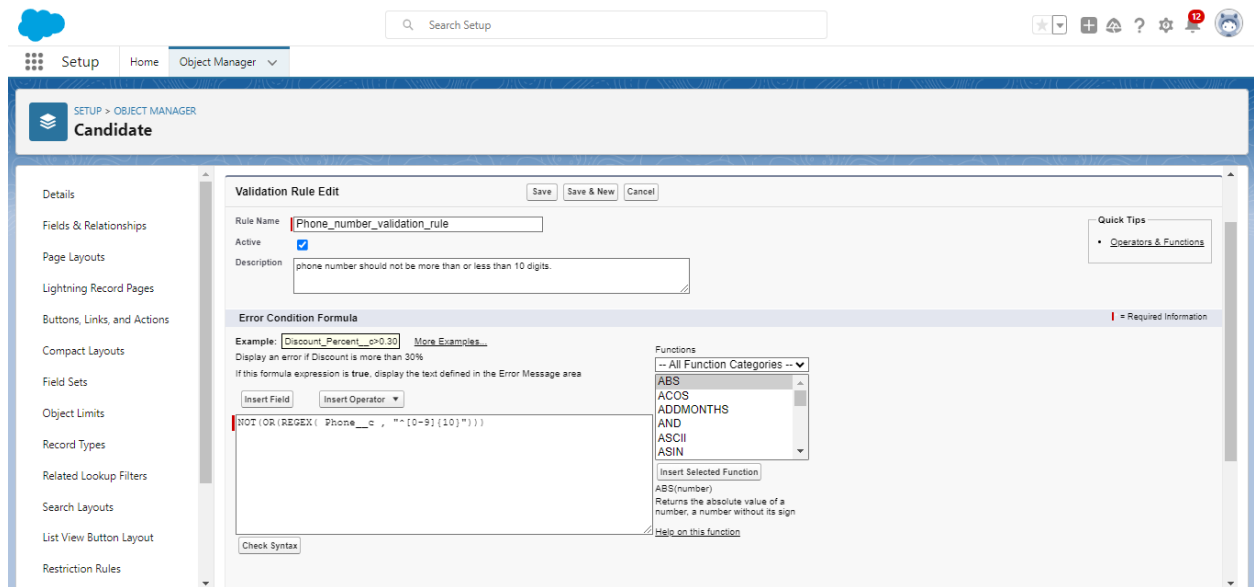
insert function NOT(OR(REGEX(Phone c,
"^[0-9]{10}"))))

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:

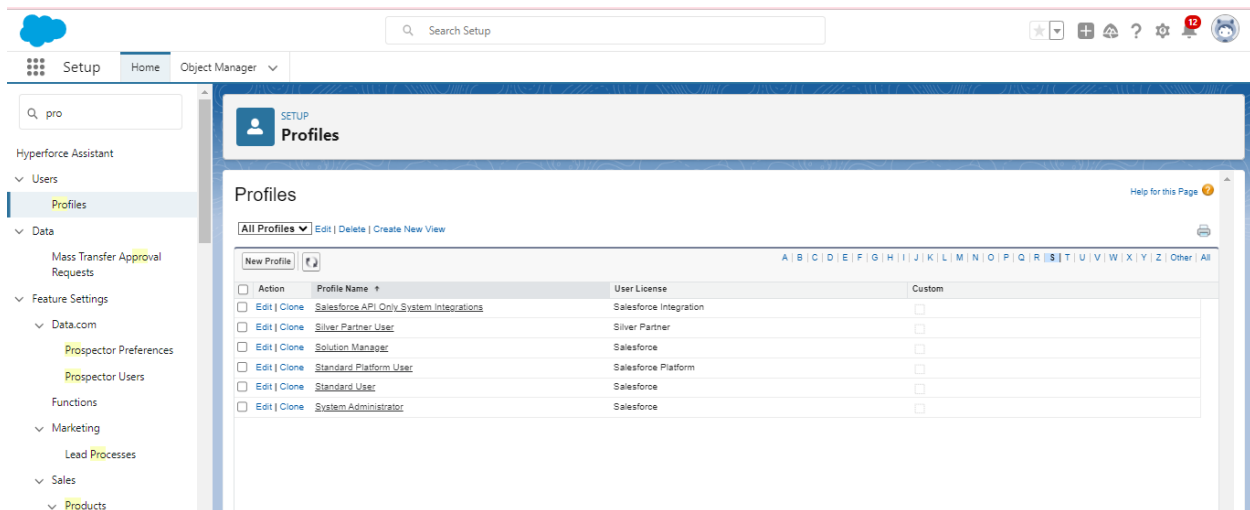
1. Rule name: Technical site checkbox true.
2. Active: checked
3. Description: Technical site checkbox should be check.
4. Under Error Condition Formula: write the condition using insert field, insert operator, insert function Technical_Site c != TRUE
5. Using check syntax: check if the formula you entered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

Profile :

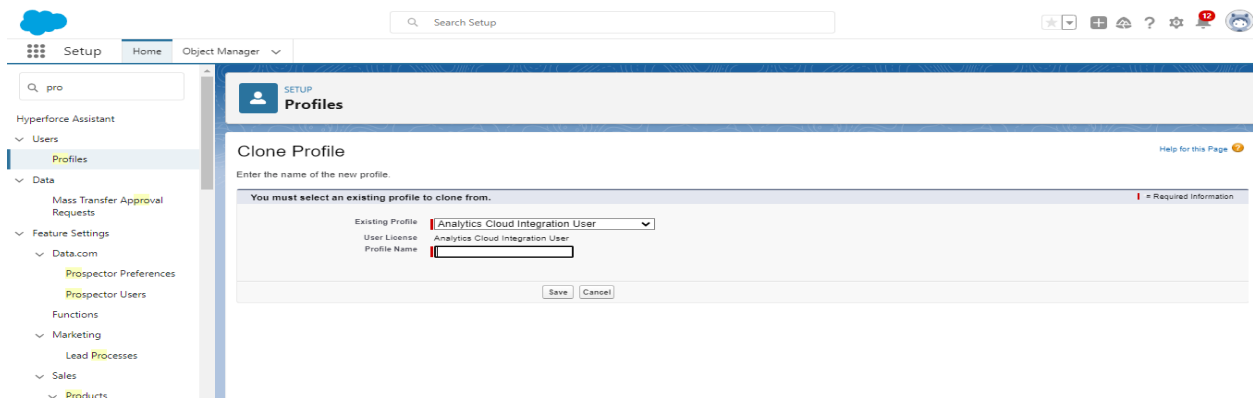
A profile is a group/collection of settings and permissions that define what a user can do insalesforce. A profile controls “Object permissions, Field permissions, User permissions, Tabsettings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

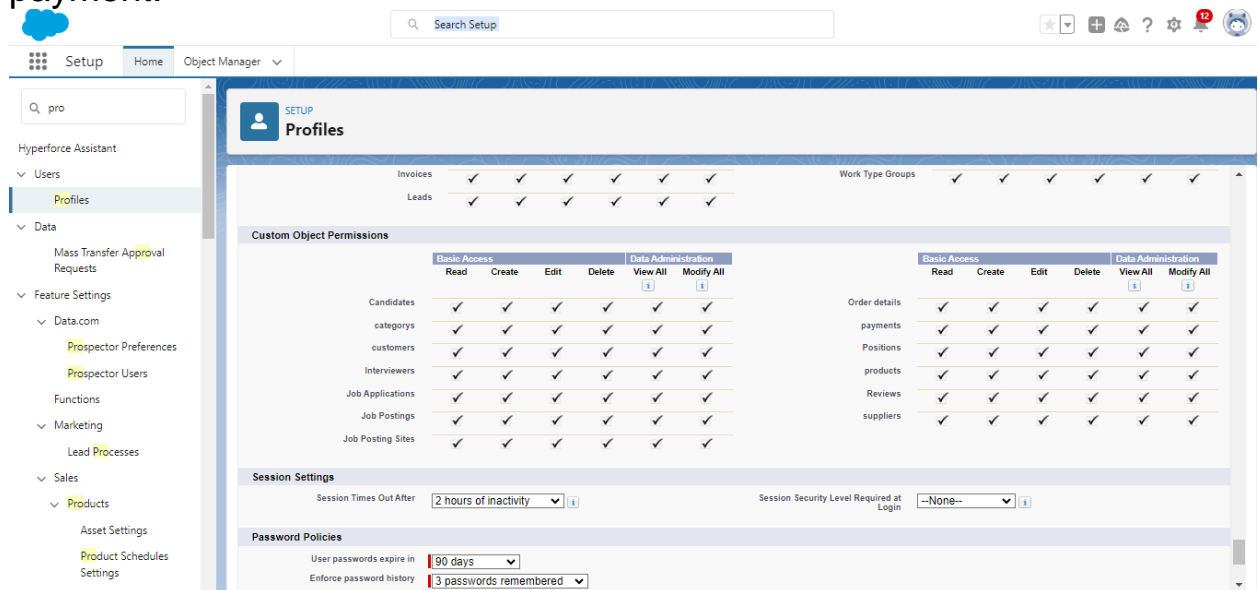


1. From the list of profiles, find Standard User.
2. Click Clone.
3. For Profile Name, enter Event user profile.
4. Click Save



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
- Nickname: Sanju
- Role: leave it as default
- User License: Salesforce
- Profile: Hr Profile

The screenshot shows the Salesforce Setup page with the 'Users' section selected in the left sidebar. The main content area displays the 'All Users' page, which includes a search bar, a list of users, and a table of user details.

Users Table:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5f00000c9d10eab10phomzaid0@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Ganapati, Abhilash	gapa	gattimukesh@gmail.com		✓	Interviewer
<input type="checkbox"/> Edit	Gurta, Sanjay	Sani	sanjaygupta28@thesmartbridge.com		✓	HR Profile
<input type="checkbox"/> Edit	gatti_satyaa_sai mukesh	gatti	gattisatya@goddinupati.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5f00000c9d10eab10phomzaid0@chatter.salesforce.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d5f00000c9d10eab10phomzaid0@chatter.salesforce.com		✓	Analytics Cloud Security User

Permission Set :

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

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

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	Experience 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.

Permission Set Create

Enter permission set information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

-Choose --None-- if you plan to assign this permission set to multiple users with different user and permission set licenses.
 -Choose a specific user license if you want users with only one license type to use this permission set.
 -Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License

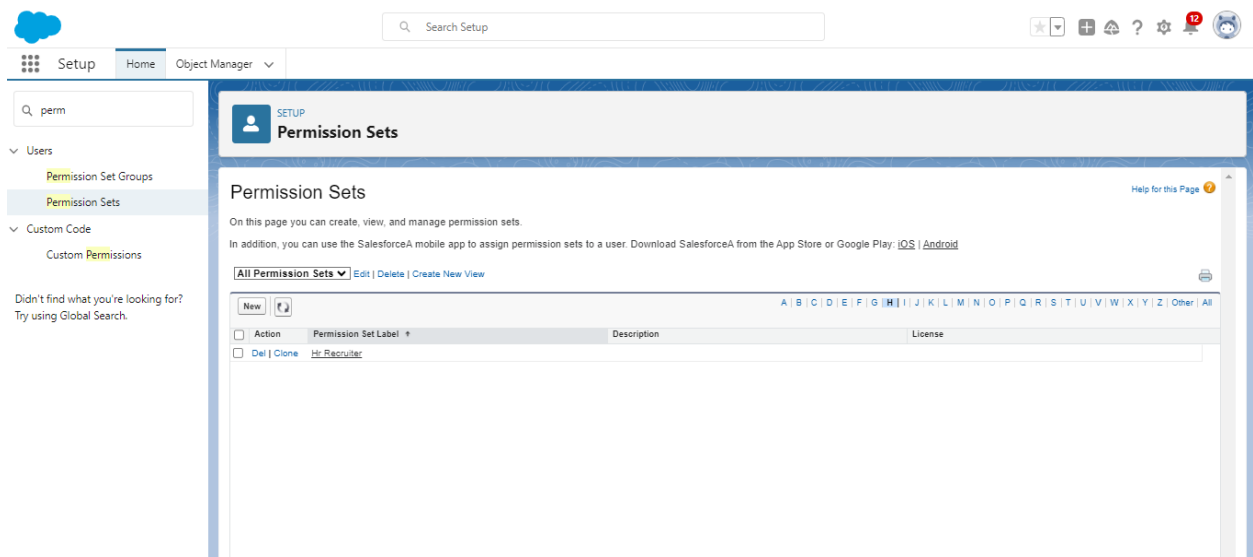
3. After saving the permission click on objects settings and search review object.

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

New

Department

--None--


Approval Status

--None--


Location

--None--

Owner

 satya sai mukesh patti

Hiring Manager

Search People...
 

Description

Job Description

Cancel

Save & New

Save

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



New

Import

Change Owner

2 Items • Updated a minute ago

Search this list...
 






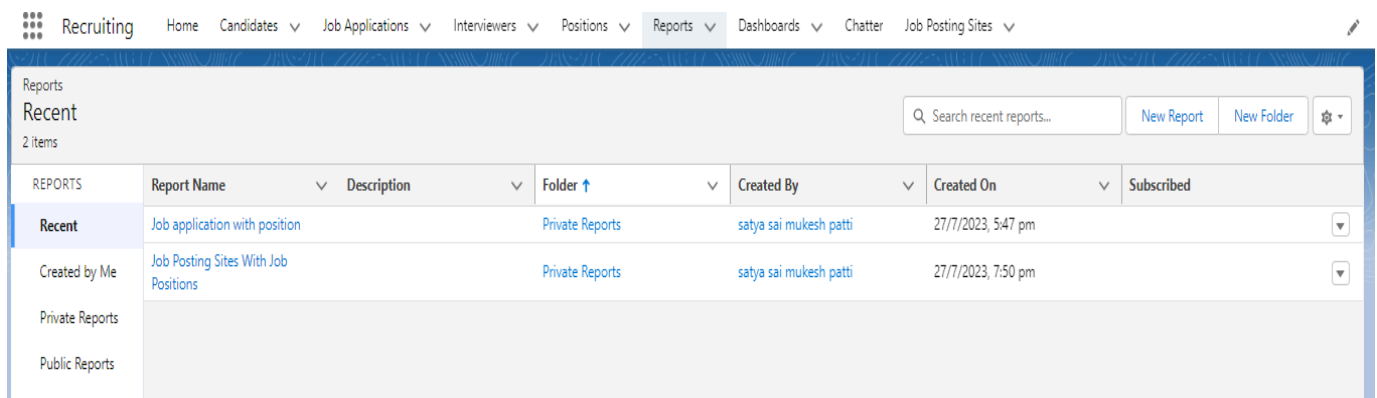
	Title	
1	<input type="checkbox"/> Awesome sales rep	
2	<input type="checkbox"/> Super Sale Rep	

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.



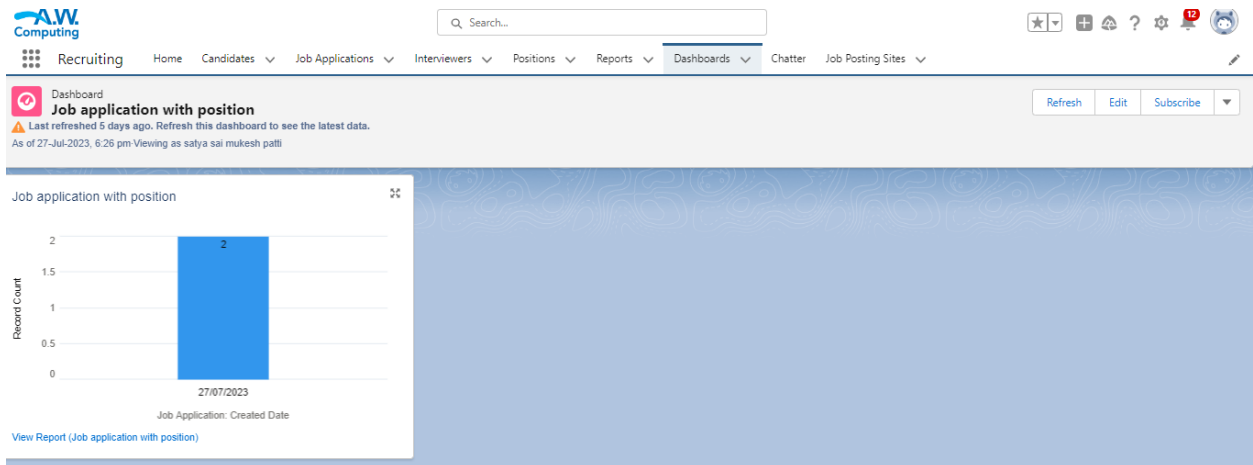
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Job application with position		Private Reports	satya sai mukesh patti	27/7/2023, 5:47 pm	
Created by Me	Job Posting Sites With Job Positions		Private Reports	satya sai mukesh patti	27/7/2023, 7:50 pm	
Private Reports					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

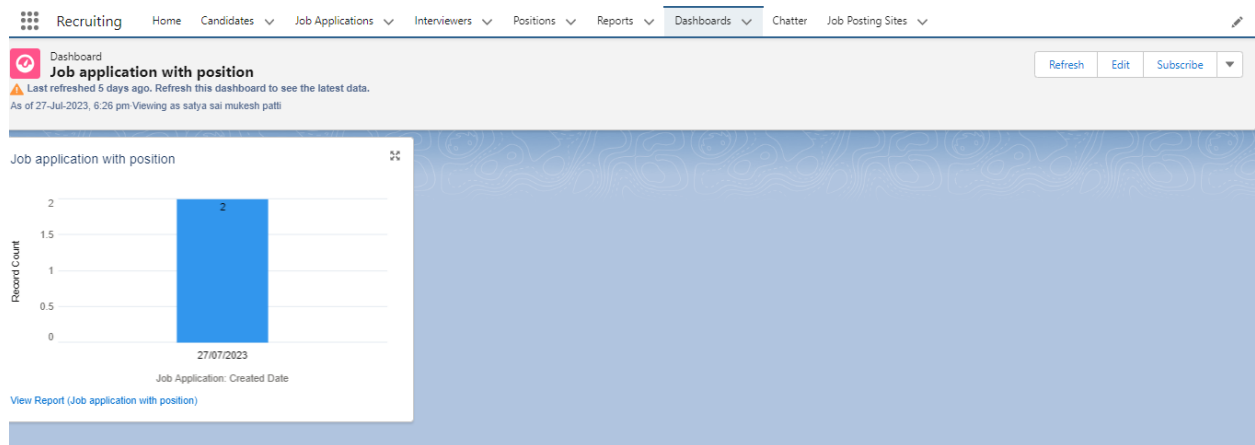
The screenshot shows the A.W. Computing Reports section. It displays a table of recent reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. There are two reports listed: 'Job application with position' and 'Job Posting Sites With Job Positions'. Both reports were created by 'satya sai mukesh patti' on '27/7/2023'.

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 ---- >