PROJECT REPORT

Recruiting Assistance For The HR Managers

Description :

To make the existing app more efficient for the HR team we create custom objects andrelationships to store and access the data more efficiently. We install an unmanaged package inthe 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/
- On the sign-up form, enter the following details:
- First name & Last name : satya&patti
- Email : pattimukesh@gmail.com
- Role: Developer
- Company: College Name : GYATRI DEGREE COLLEGE-TIRUPATI
- County: India
- Postal Code: pin code : 517101
- Username: pattisatya@gdctirupati.com

https://developer.salesforce.com/signup

- ## Package Installation :

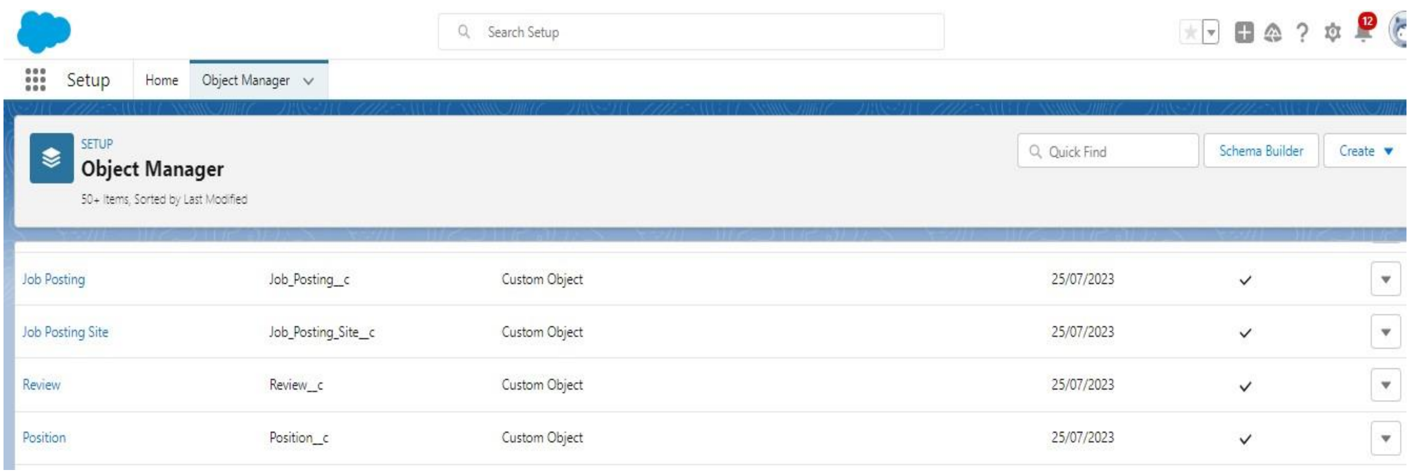
1. Go to the Package Installation Link.
2. Select Install for Admins only
3. Click install.

Object :

Salesforce objects are database tables that permit you to store data that is specific to anorganization. It consists of fields (columns) and records (rows).

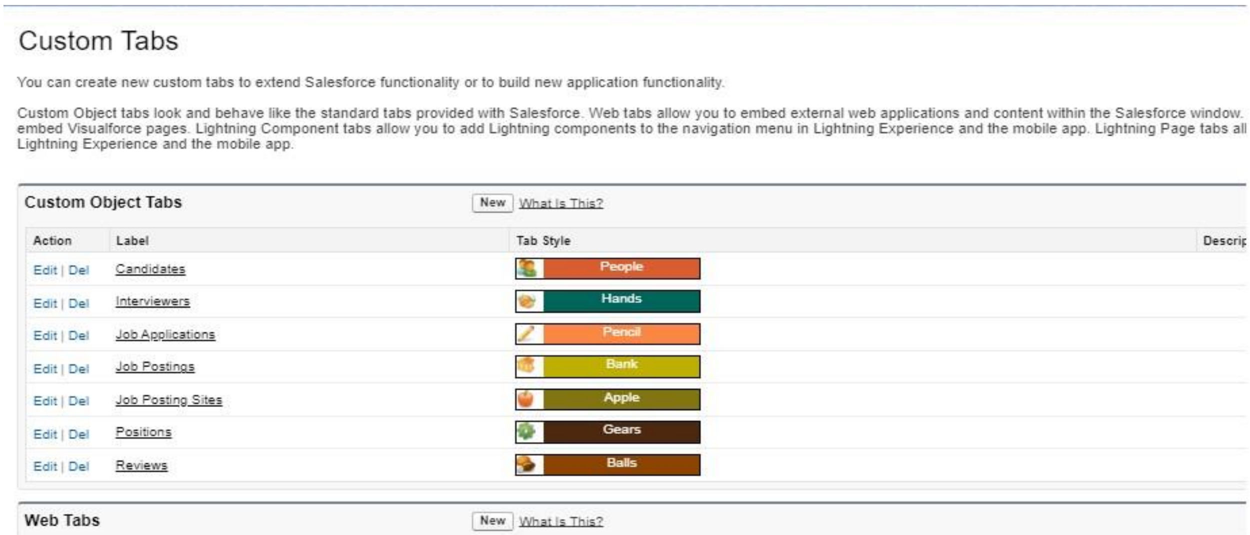
Standard Object : Account,Contact,Opportunity

Custom Object : Job Posting Site, Reviews, Junction object



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.

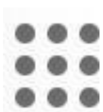
Custom Object Tabs New What Is This?

Action	Label	Tab Style	Descrip
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 asa 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

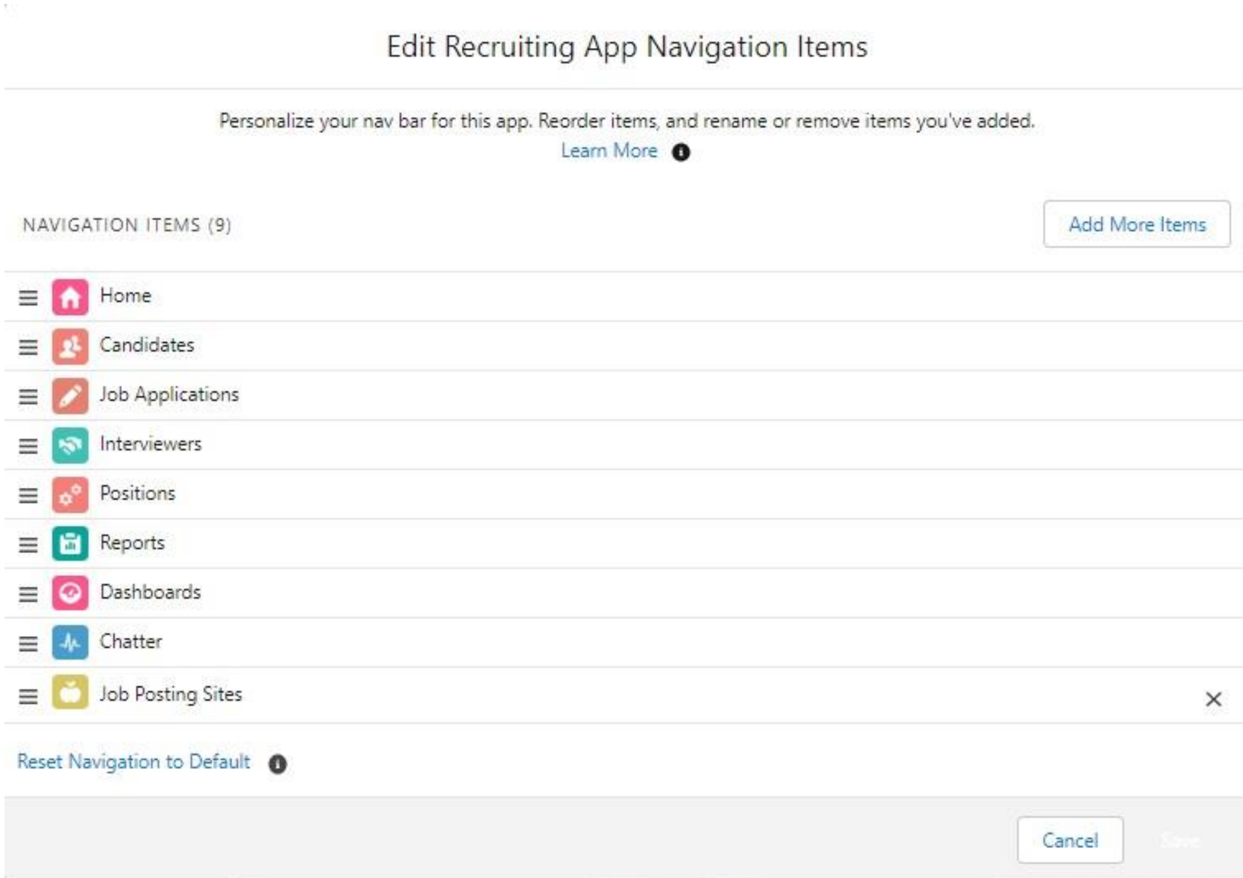
2. Click the pencil icon at the top right of the screen.

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 :

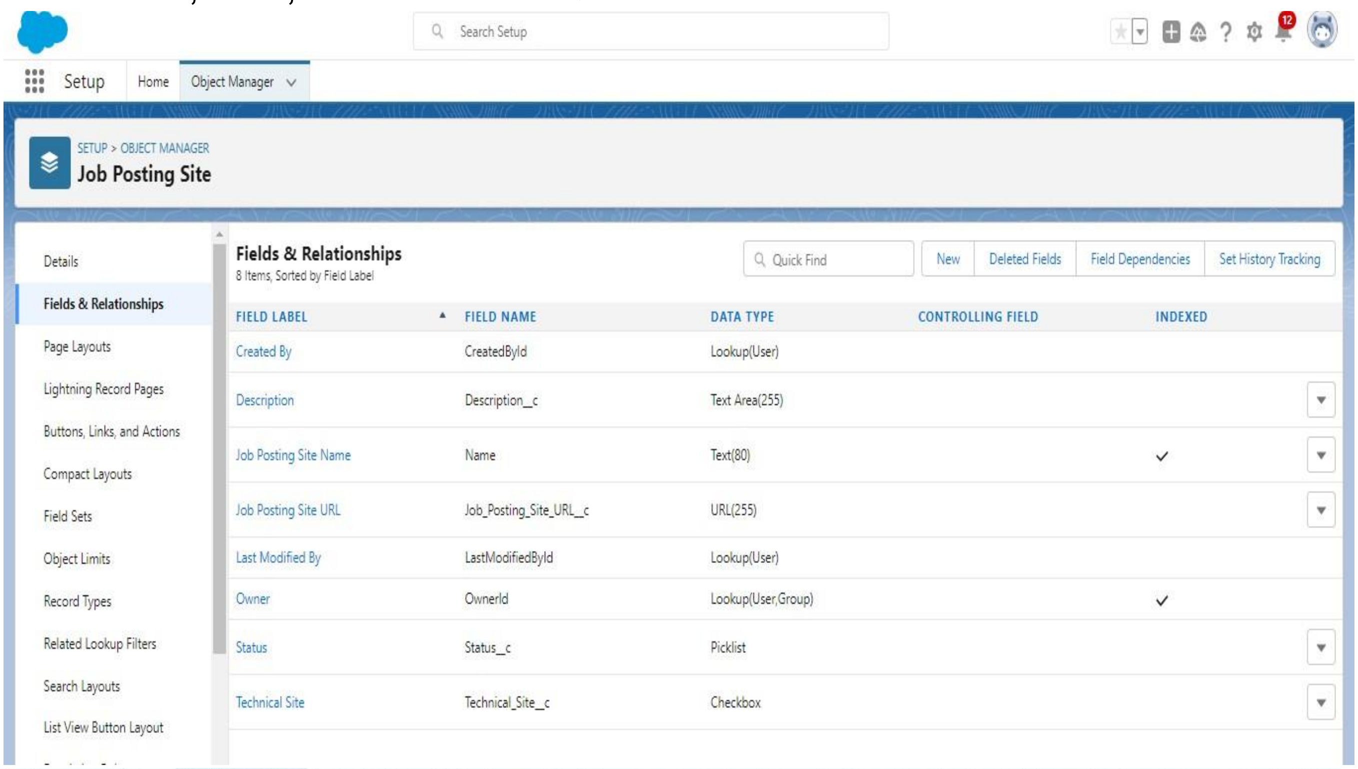
Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

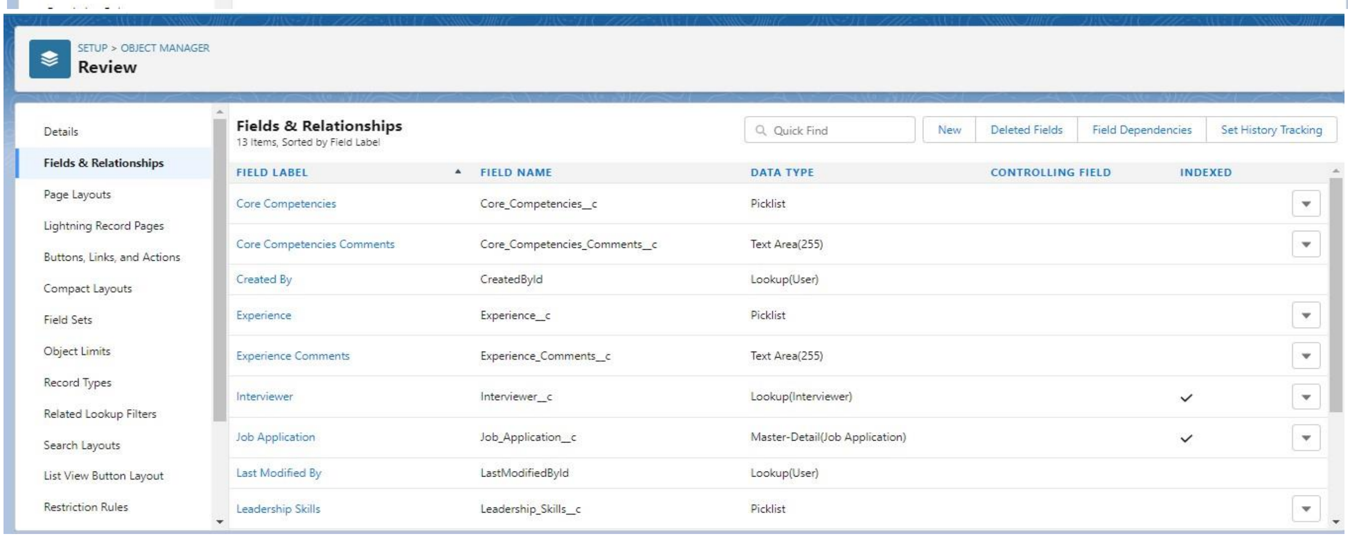
1.Click the gear icon and select Setup. This launches Setup in a new tab.

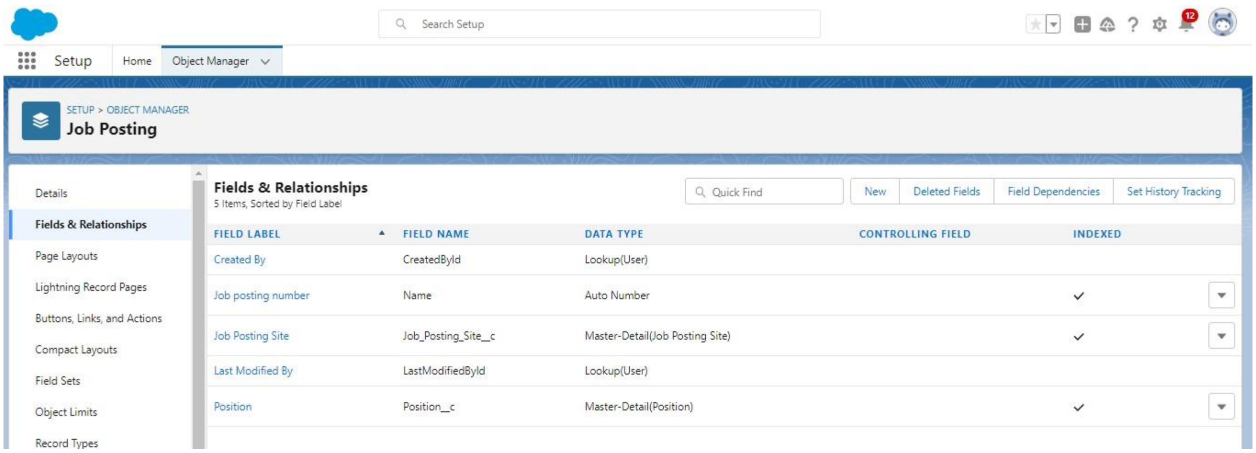
2.Click the Object Manager tab next to Home.

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







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Page Layout :

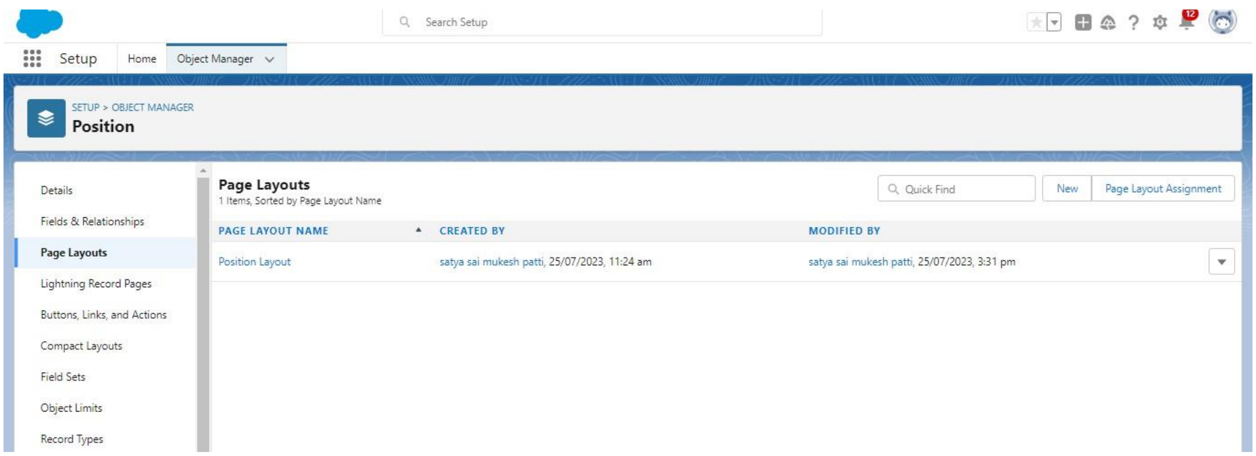
In Salesforce, a page layout is a visual design of a page that determines the organization andarrangement of fields, buttons, and other components on a page. Page layouts can be customizedto show the fields and related information that are most relevant to different users, roles, and record types. They can also be used to control the visibility and access to fields, buttons, andother components on a page

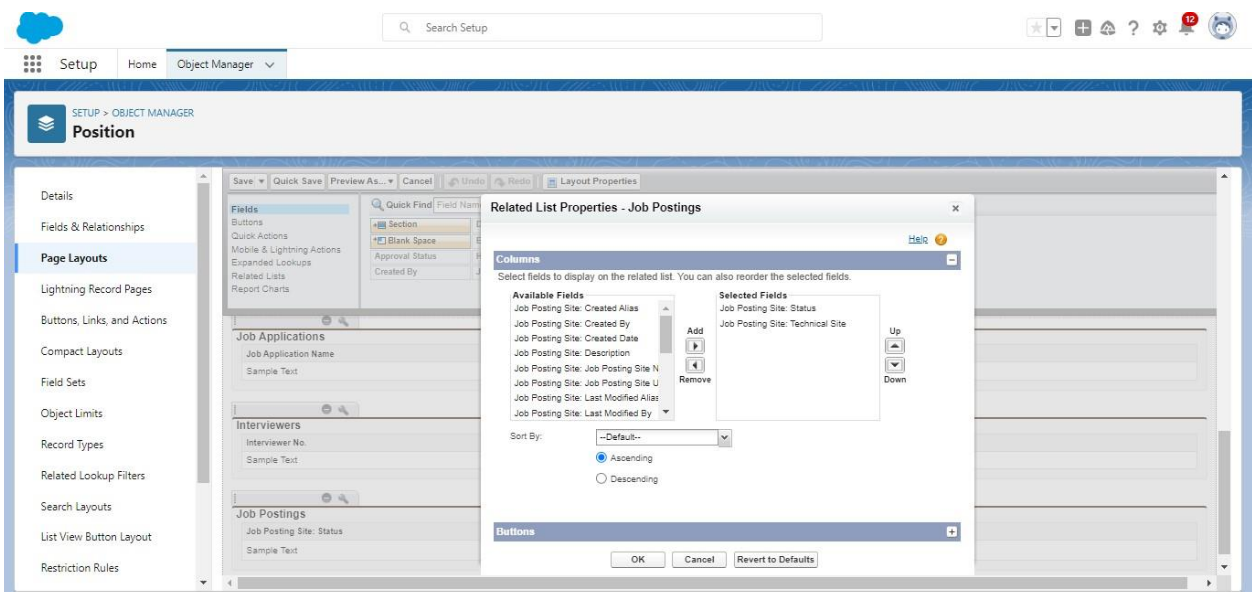
Modifying The Page Layouts :

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





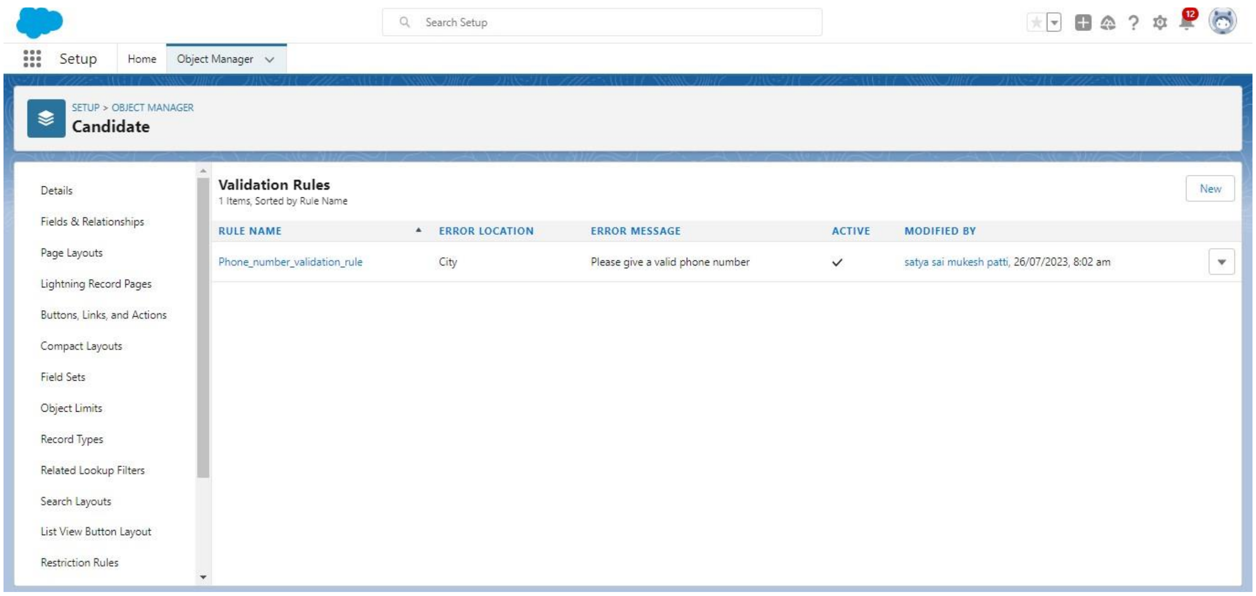
Validations Rules :

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

Creating A Validation Rule :

To create a validation rule:

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

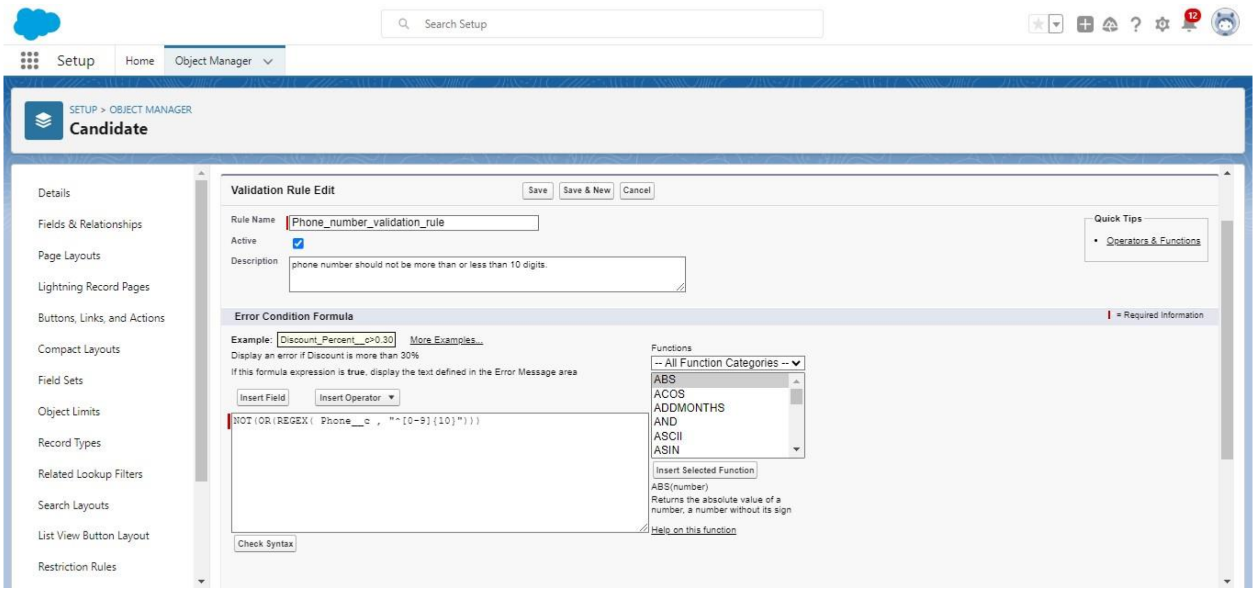


Give details as:

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, scrolldown and click validation rule, New. Give details as:

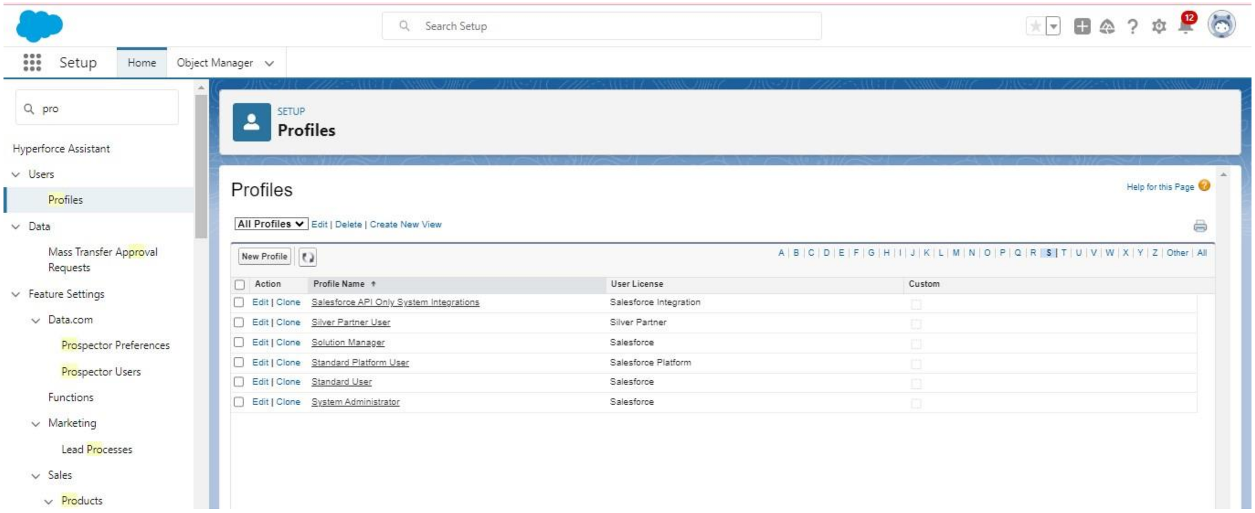
1. Rule name: Technical site checkbox true.
2. Active: checked
3. Description: Technical site checkbox should be check.
4. Under Error Condition Formula: write the condition using insert field, insert operator, insert function Technical_Site c != TRUE 5. Using check syntax: check if the formula you entered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

Profile :

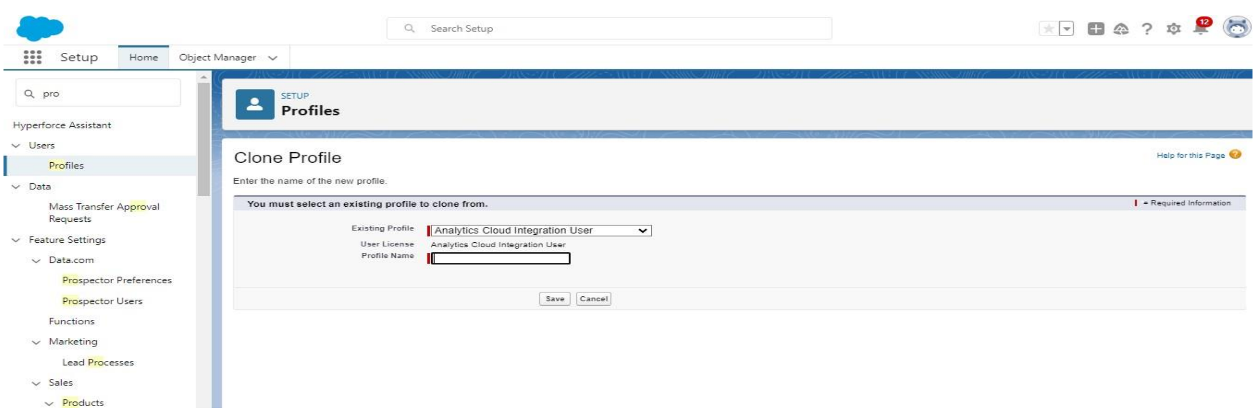
A profile is a group/collection of settings and permissions that define what a user can do insalesforce. A profile controls “Object permissions, Field permissions, User permissions, Tabsettings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

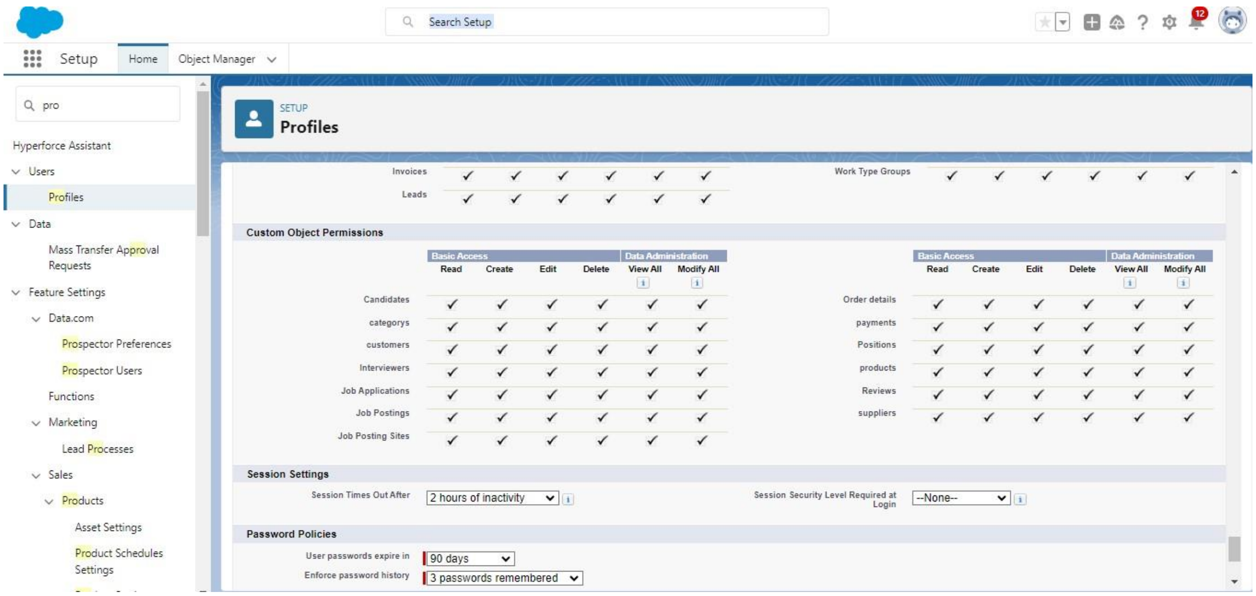


1. From the list of profiles, find Standard User.
2. Click Clone.
3. For Profile Name, enter Event user profile.
4. Click Save



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 theOrder details, supplier, product, customer, category, payment.

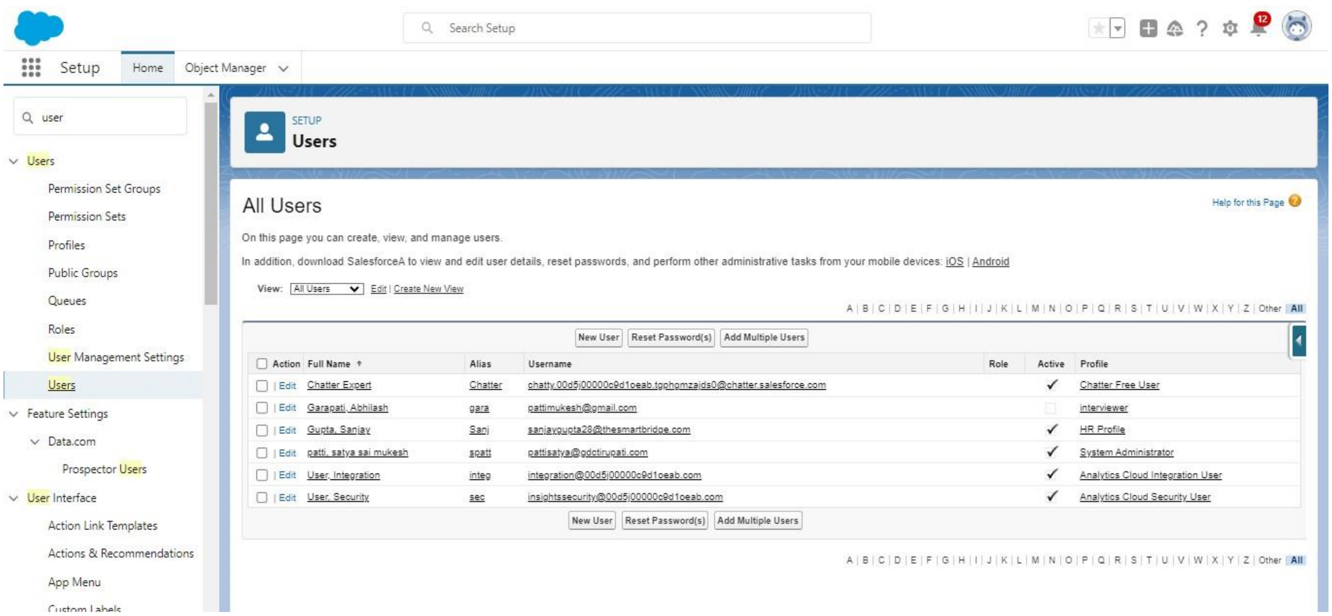


User :

Creating A User :

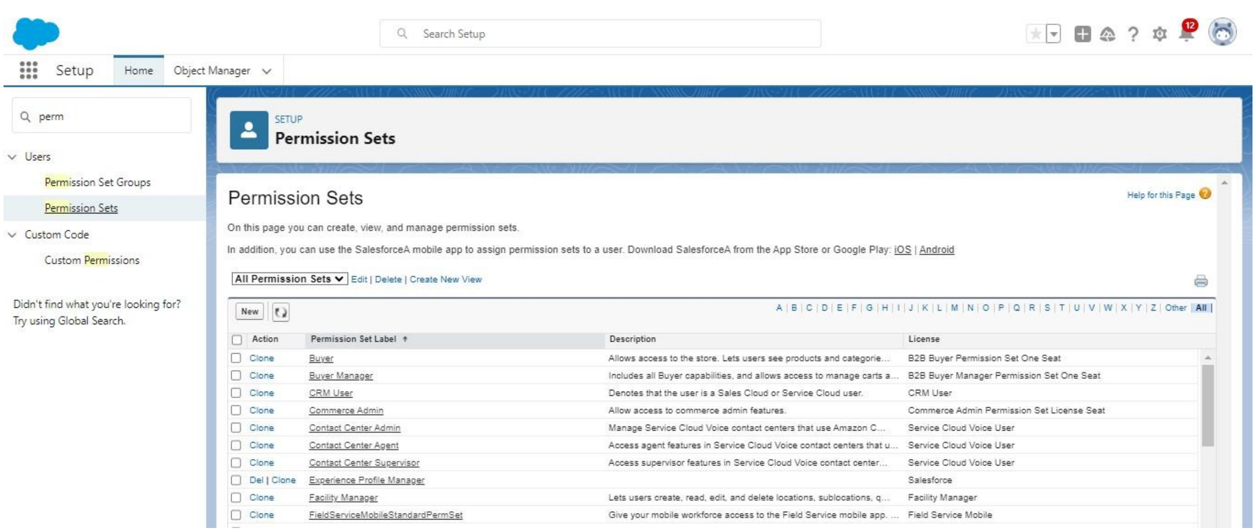
From setup type “users” in quick find and select users, then click New User.

- 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 Profilie

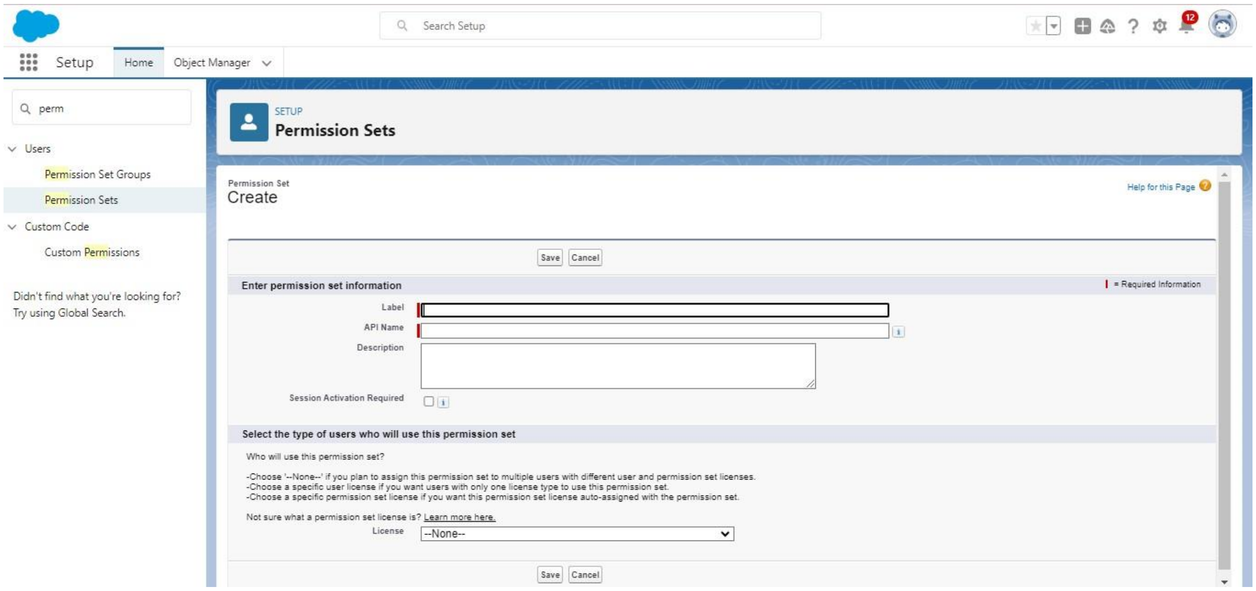


Permission Set :

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



2.Enter label as: Hr Recruiter and Save.



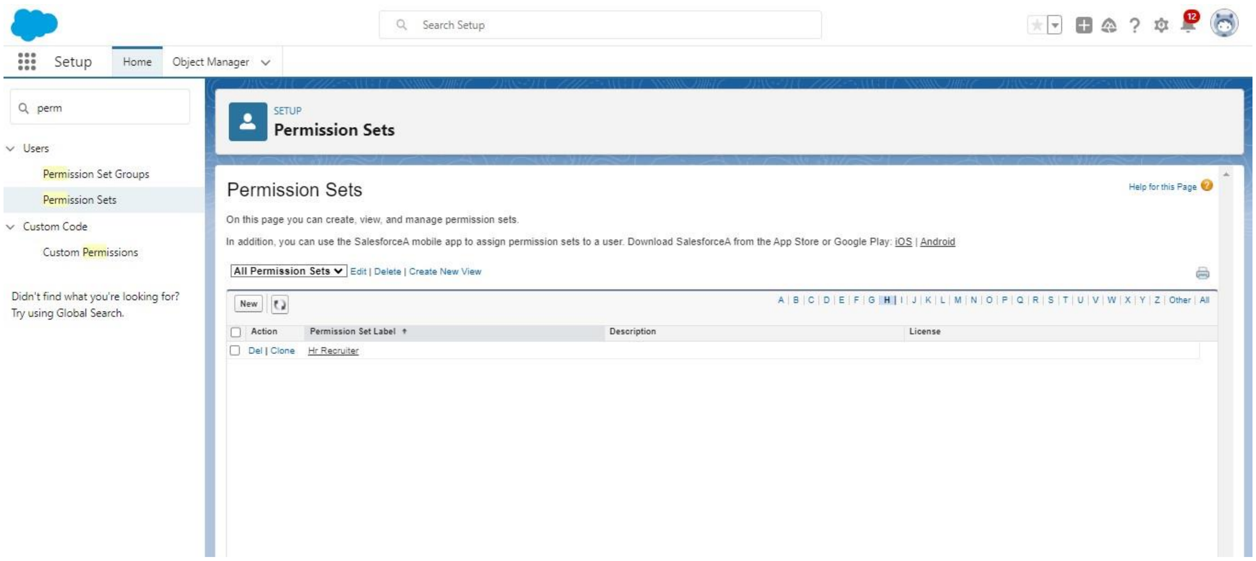
3. After saving the permission click on objects settings and search review object.

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.

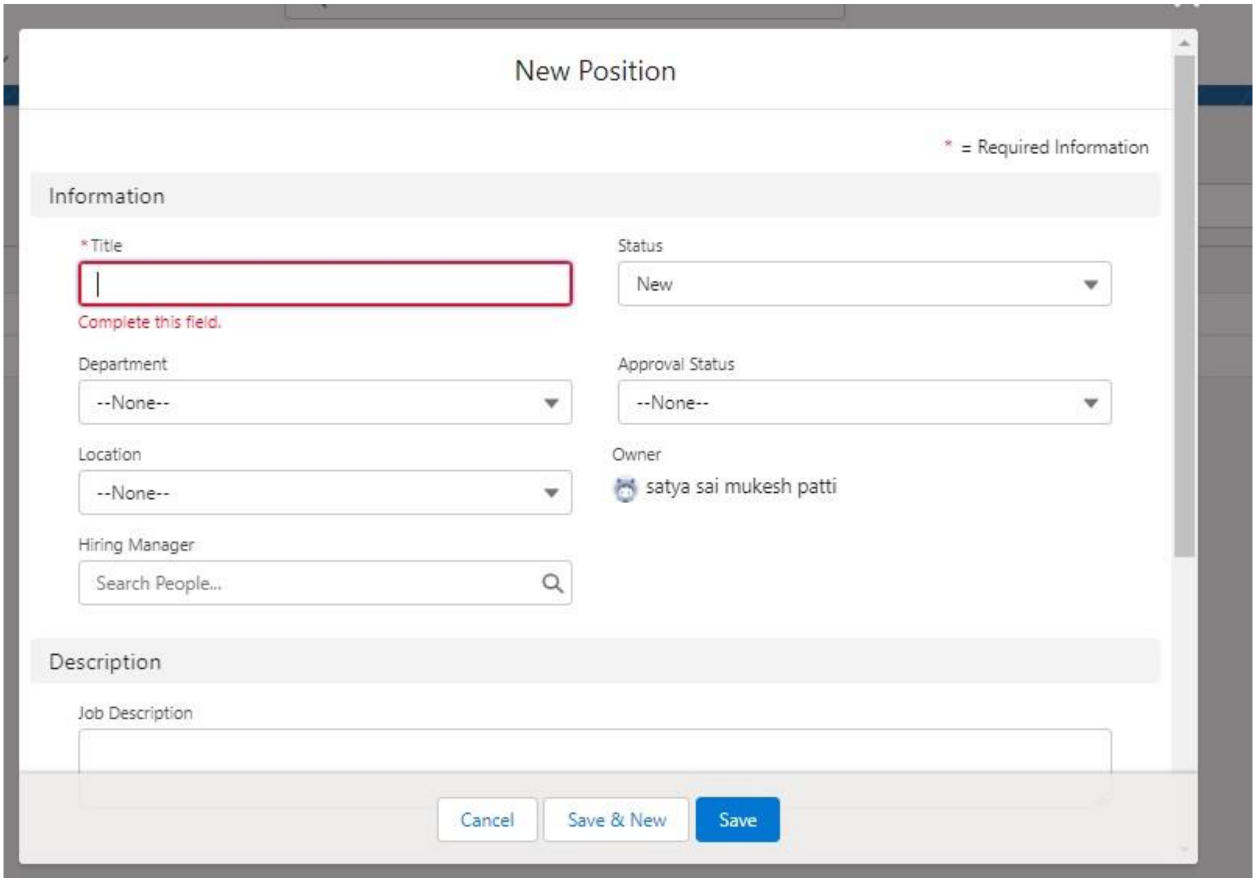
6. Now click on the Add Assignment

7.Now select the users and click on save.



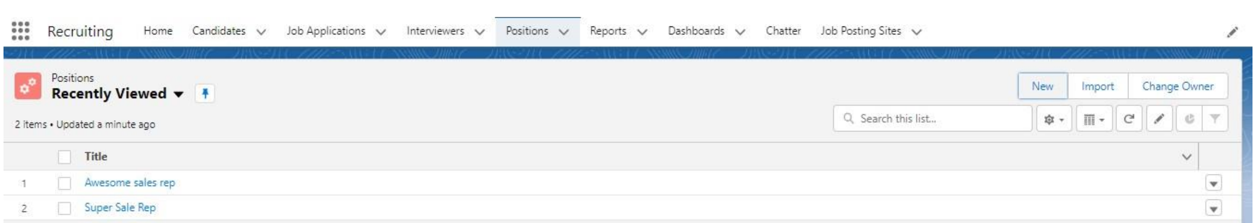
Create A Record (Positions) :

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



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



Delete A Record (Positions) :

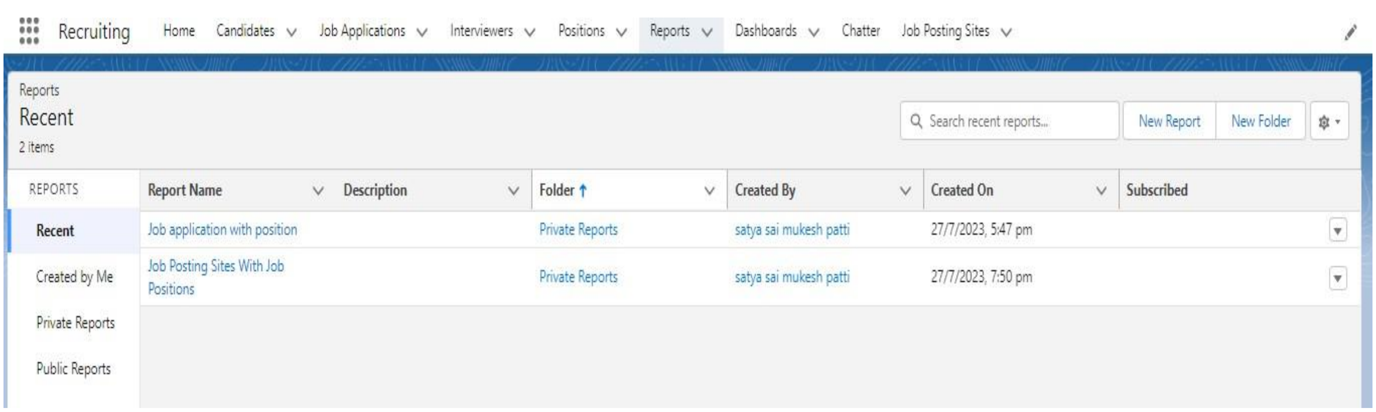
- Click on App Launcher on left side of screen.
- Search Recruiting & click on it.
- Click on Positions Tab.
- Click on Arrow at right hand side on that Particular record.
- Click delete and delete again.

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.

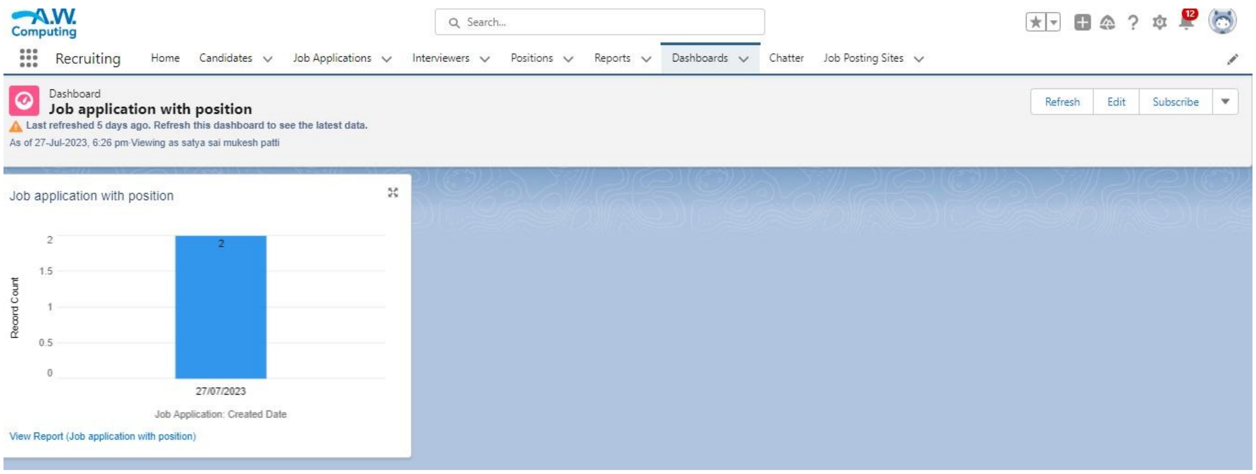


Dashboard :

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.

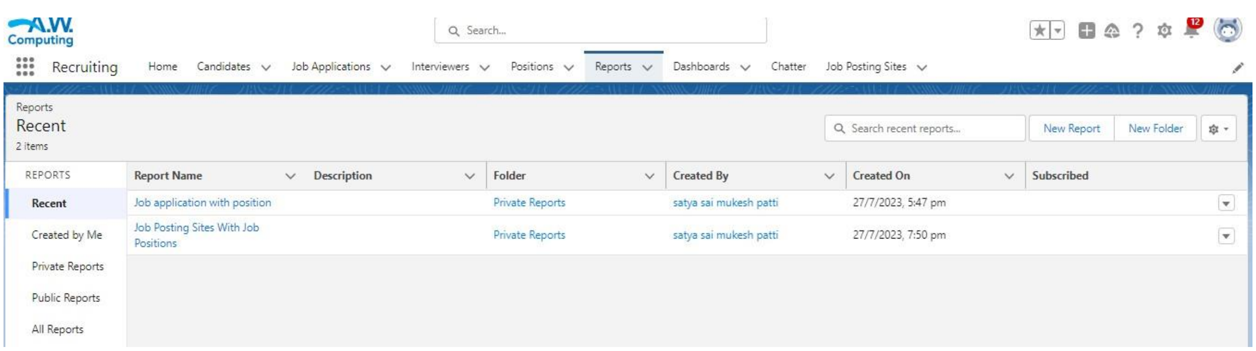
6. Select the Vertical Bar Chart component and click Add.
7. Click Save and then Done.



View Report And Dashboard :

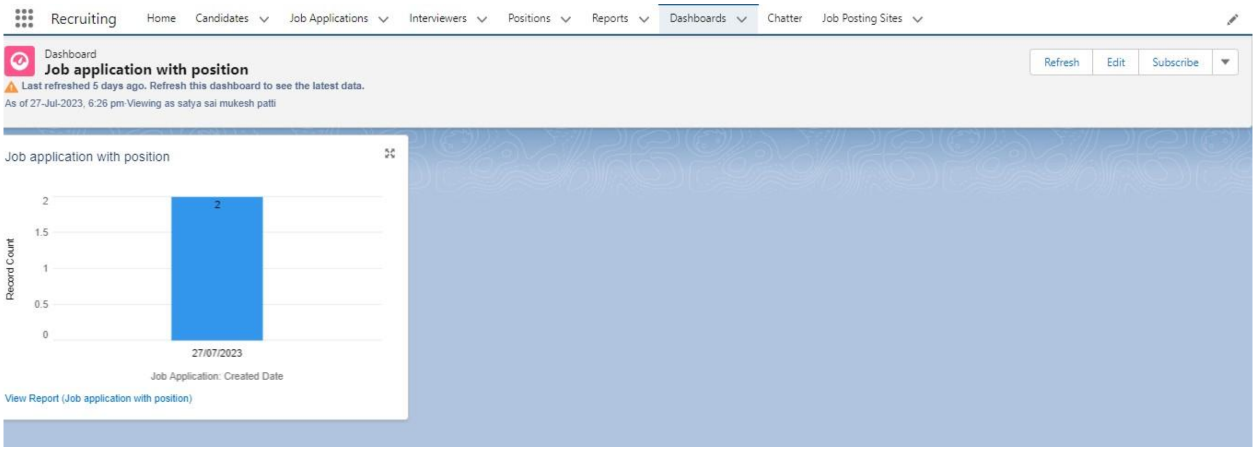
Report :

- 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



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



Recruiting
Home
Candidates
Job Applications
Interviewers
Positions
Reports
Dashboards
Chatter
Job Posting Sites
Dashboard
Job application with position
Last refreshed 5 days ago. Refresh this dashboard to see the latest data.
As of 27-Jul-2023, 6:26 pm·Viewing as satya sai mukesh patti
Refresh
Edit
Subscribe
Job application with position
Record Count
2
1.5
1
0.5
0
2
27/07/2023
Job Application: Created Date
View Report (Job application with position)

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