

# NAAN MUDHALAVAN

## SALES FORCE PROJECT REPORT

COLLEGE:- SCAD COLLEGE OF ENGINEERING & TECHNOLOGY

### BATCH 19

NAME	NM ID	REG NO
Santhoshraj M	583BDDA34D34B9688C448A3DE82B3657	952820114021
Srinagaraja perumal L	1D1C82F2D5F7A86AC214ED782CDCB8E2	952820114023
Murali K	F21D27636D9DDE9804B4E0BC64B6E46E	952820114338
Surya A	81A402A6B404D8AB6A5443AA255649D4	952820114701

## STEP 1: CREATE A SALESFORCE ACCOUNT

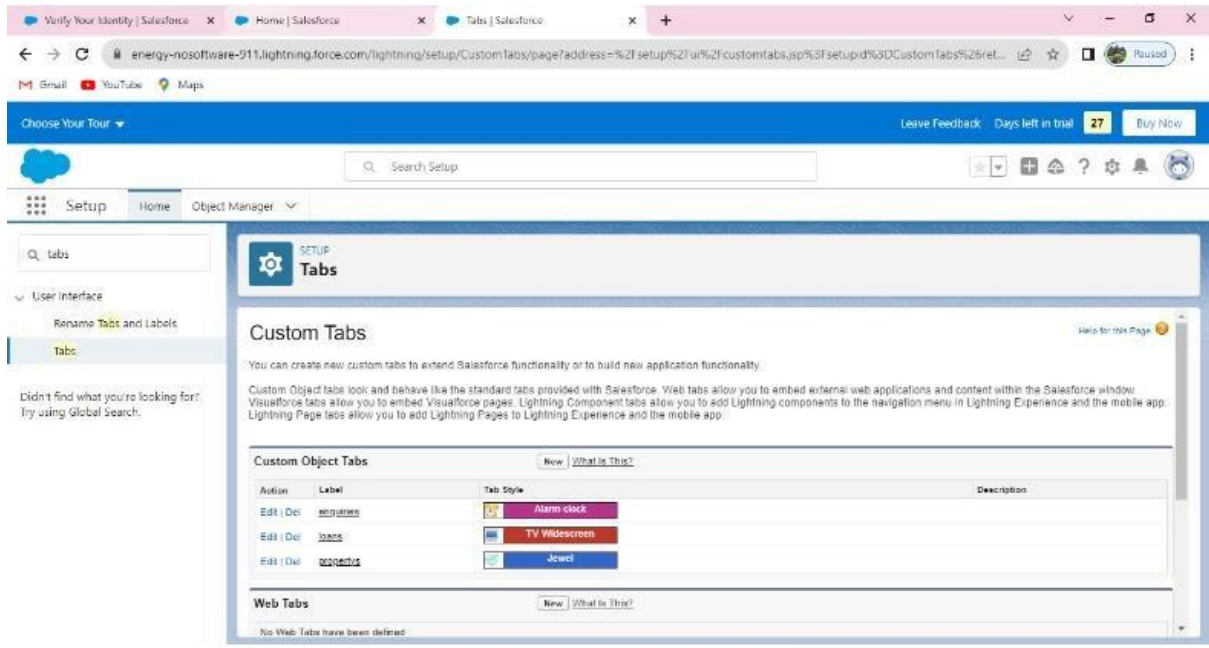
The screenshot shows the Salesforce user interface for a user named Surya A. The top navigation bar includes links to Home, Accounts, Contacts, Sales, Outreach, Service, Calendar, Dashboards, and Reports. The user's profile card displays a custom avatar, the name 'Surya A', and a bio: 'Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)'. There are buttons for 'Edit' and 'User Detail'. Below the profile card, there are links to 'Learn new skills on Trailhead' and 'Connect with fellow Trailblazers on the Trailblazer Community'. The bottom of the page shows a 'To Do List' section.

## STEP 2: CREATE THE OBJECT ( PROPERTY & LOAN )

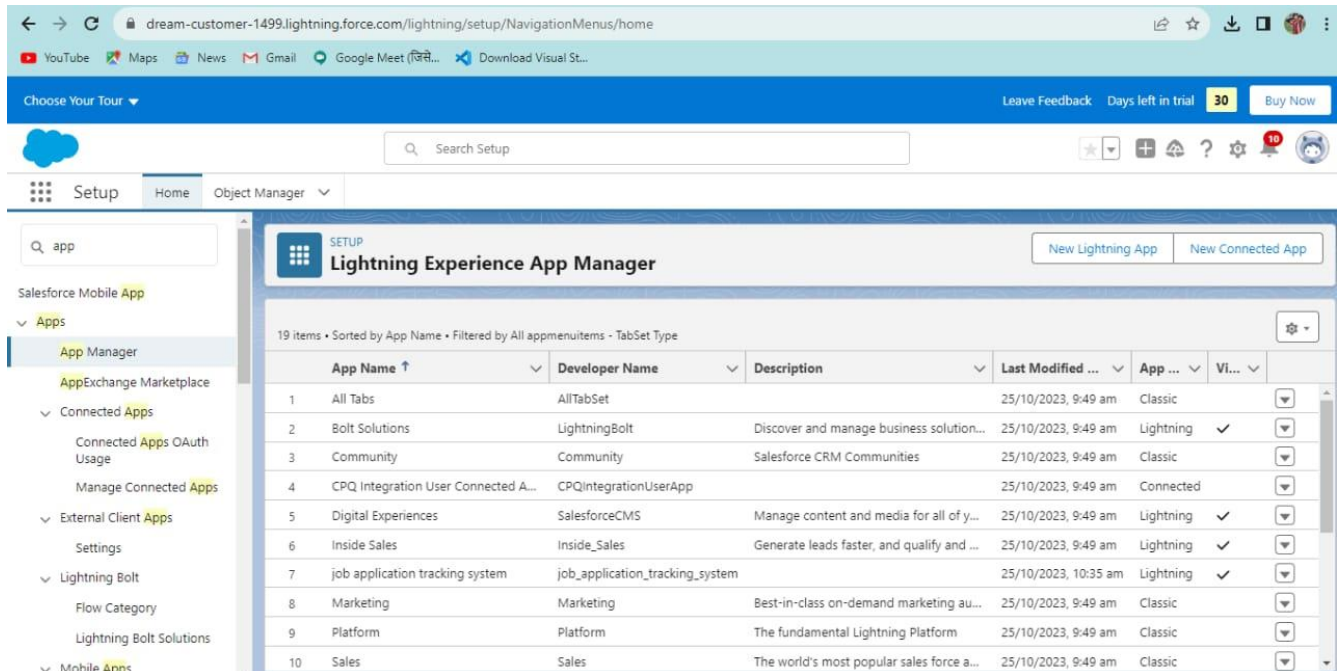
The screenshot shows the Salesforce Object Manager setup page. The top navigation bar includes links to Setup, Home, and Object Manager. The page title is 'Object Manager' with a subtitle '1 Items, Sorted by Label'. There is a search bar with the text 'recu' and buttons for 'Schema Builder' and 'Create'. Below the header, there is a table with the following data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
recurter	recurter__c	Custom Object		25/10/2023	✓

## STEP 3 CREATE THE LIGHTNING TAB TO CREATE A TAB : (ENQUIRE & TAB)



## STEP 4; Lightning(job application tracking app)



## STEP 5 ;Fields & Relationship( recruiter,job,candidate,application)

Choose Your Tour
Leave Feedback
Days left in trial
30
Buy Now

Setup
Home
Object Manager

**SETUP > OBJECT MANAGER**  
**recurter**

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

**Fields & Relationships**  
5 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)		✓
recurter Name	Name	Text(80)		✓
Recurter Number	Recurter_Number__c	Auto Number		

## STEP: Create a Profile

Choose Your Tour
Leave Feedback
Days left in trial
30
Buy Now

Setup
Home
Object Manager

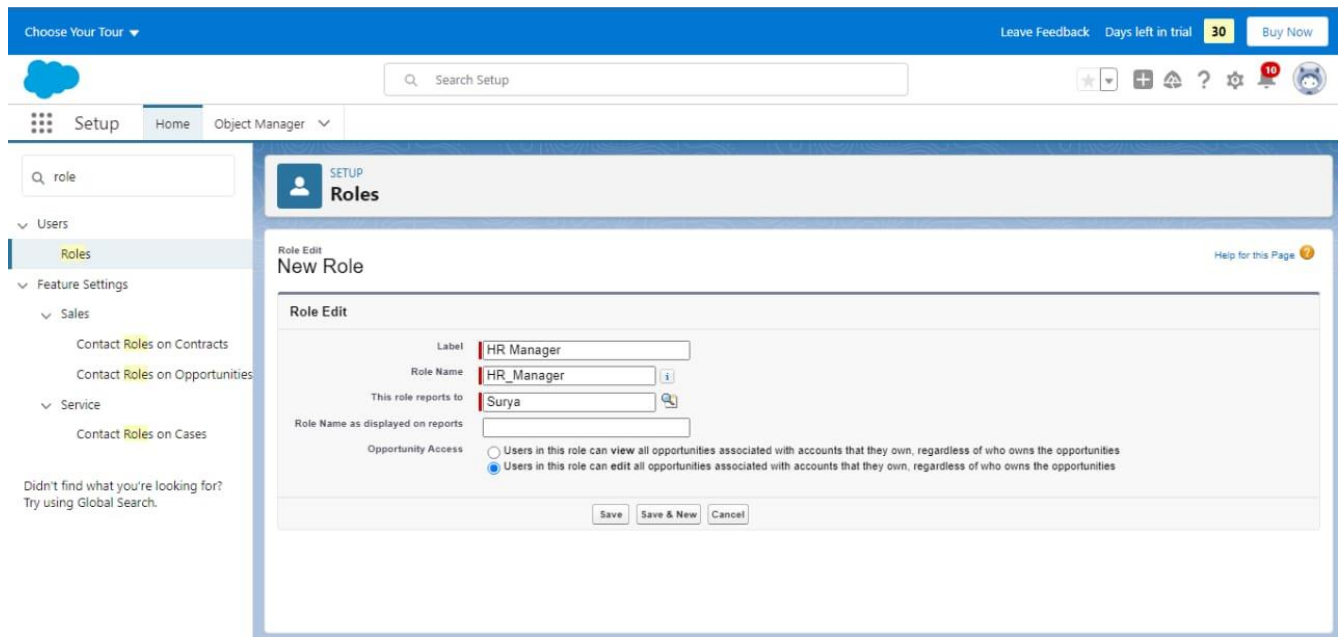
Users
**Profiles**

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

**SETUP**  
**Profiles**

<a href="#">Edit</a>	<a href="#">Analytics Cloud Integration User</a>	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Analytics Cloud Security User</a>	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Chatter External User</a>	Chatter External	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Chatter Free User</a>	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Chatter Moderator User</a>	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Contract Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">CPQ Integration User</a>	CPQ Integration User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">End User</a>	Salesforce	✓
<a href="#">Edit</a>	<a href="#">Identity User</a>	Identity	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Marketing User</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Minimum Access - Salesforce</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Recruiter</a>	Salesforce	✓
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">sales manager</a>	Salesforce	✓
<a href="#">Edit</a>	<a href="#">Solution Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Standard User</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>	<a href="#">System Administrator</a>	Salesforce	<input type="checkbox"/>

## STEP 6 : Create a Role



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "role" entered. The "Roles" link is highlighted. The main content area is titled "New Role" and contains a "Role Edit" form. The form fields are: Label (HR Manager), Role Name (HR\_Manager), This role reports to (Surya), and Role Name as displayed on reports (empty). Under "Opportunity Access", the second option is selected: "Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities". At the bottom are "Save", "Save & New", and "Cancel" buttons.

Choose Your Tour ▾ Leave Feedback Days left in trial 30 Buy Now

Search Setup

Setup Home Object Manager ▾

role

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Contact Roles on Cases

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

SETUP Roles

Role Edit

New Role

Help for this Page

Role Edit

Label HR Manager

Role Name HR\_Manager

This role reports to Surya

Role Name as displayed on reports

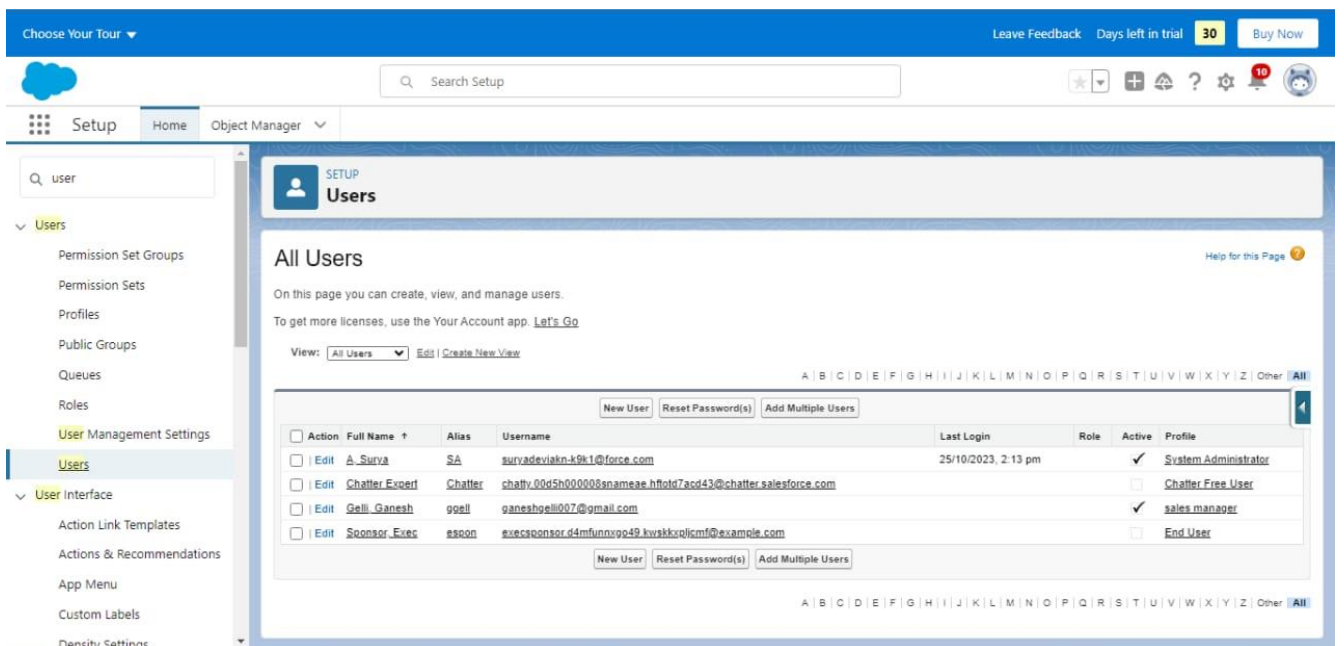
Opportunity Access

☐ Users in this role can view all opportunities associated with accounts that they own, regardless of who owns the opportunities

☒ Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities

Save Save & New Cancel

## STEP 7 ; Create a User



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "user" entered. The "Users" link is highlighted. The main content area is titled "All Users" and contains a table of users. The table has columns: Action, Full Name, Alias, Username, Last Login, Role, Active, and Profile. There are four users listed: A. Surya (System Administrator), Chatter Expert (Chatter Free User), Gelli Ganesh (sales manager), and Sponsor\_Eues (End User). At the bottom are "New User", "Reset Password(s)", and "Add Multiple Users" buttons.

Choose Your Tour ▾ Leave Feedback Days left in trial 30 Buy Now

Search Setup

Setup Home Object Manager ▾

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

SETUP Users

All Users

Help for this Page

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

To get more licenses, use the Your Account app. [Let's Go](#)

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

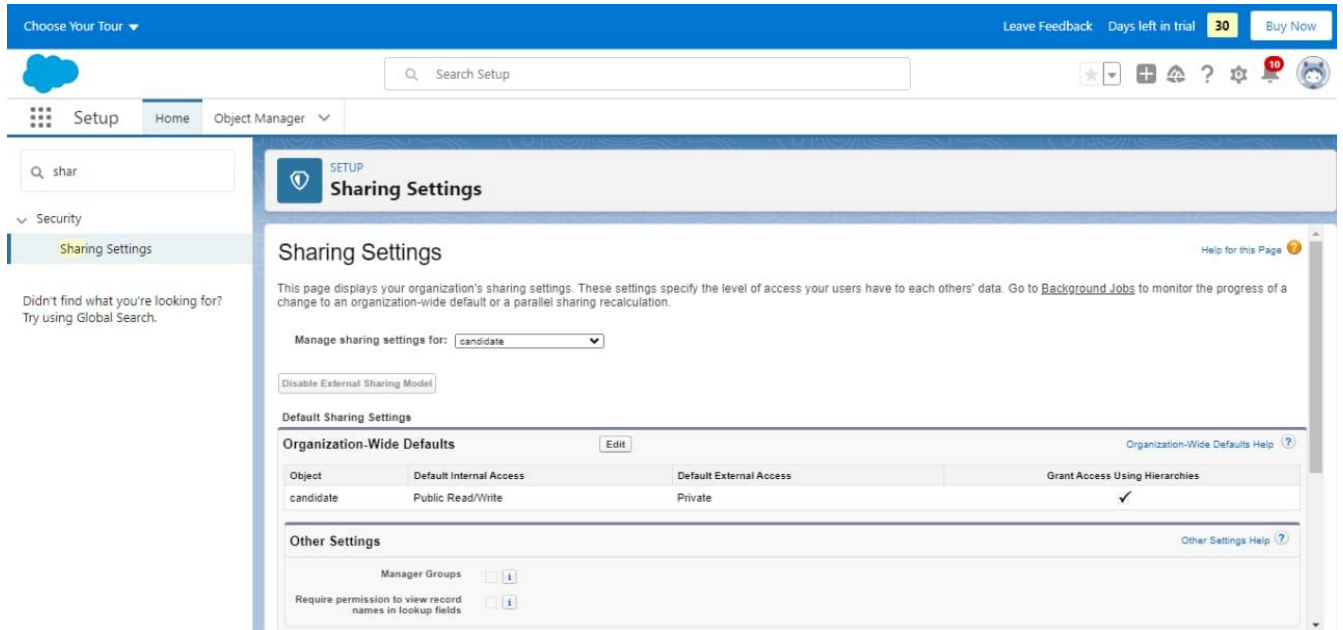
New User Reset Password(s) Add Multiple Users

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile
<input type="checkbox"/> Edit	A. Surya	SA	survadeviakn-k9k1@force.com	25/10/2023, 2:13 pm	System Administrator	✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chathv00d5h000008snameae.htf0td7ad43@chatter.salesforce.com		Chatter Free User	✓	Chatter Free User
<input type="checkbox"/> Edit	Gelli Ganesh	g9eli	ganeshgelli007@gmail.com		sales manager	✓	sales manager
<input type="checkbox"/> Edit	Sponsor_Eues	esoon	esecspoonor.d4mfunny9p49.kvakkzqlcmf@example.com		End User	✓	End 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

## STEP 8 ; Create sharing rules



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "shar" and a list of categories including Security and Sharing Settings. The main content area is titled "Sharing Settings" and includes a sub-header "Sharing Settings". Below this, there is a section "Manage sharing settings for:" with a dropdown menu set to "candidate". A button "Disable External Sharing Model" is visible. The "Default Sharing Settings" section includes a table for "Organization-Wide Defaults" and a section for "Other Settings".

**Organization-Wide Defaults**

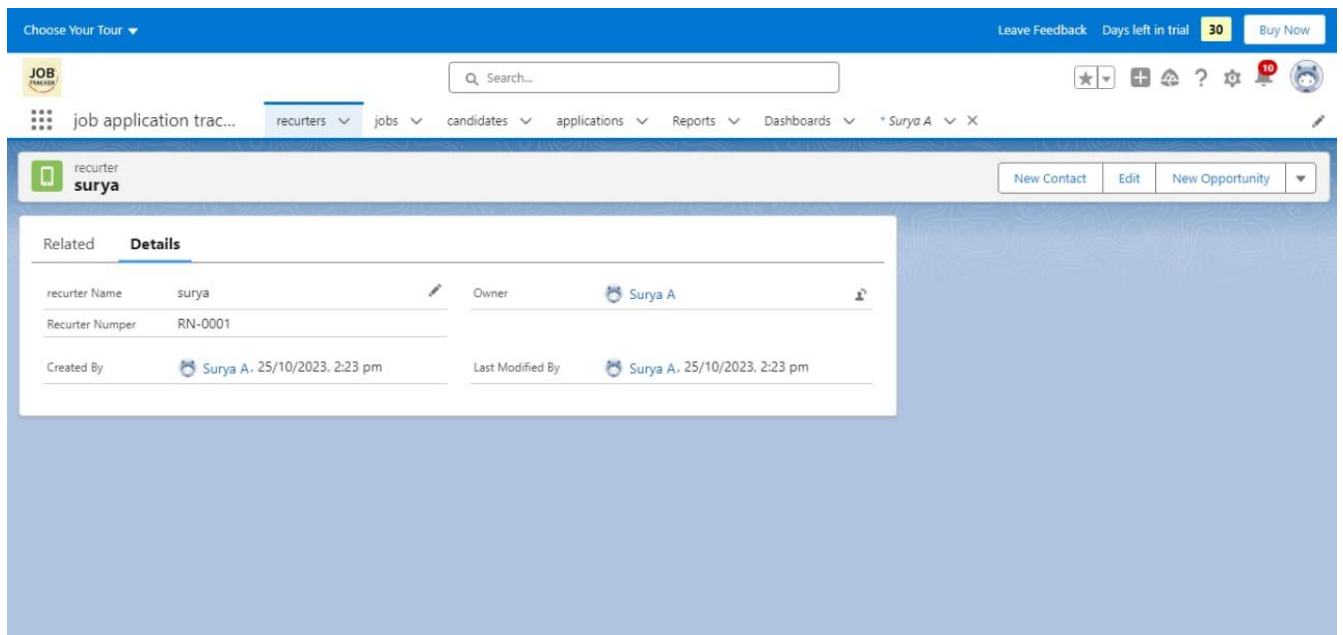
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
candidate	Public Read/Write	Private	<input checked="" type="checkbox"/>

**Other Settings**

Manager Groups: ☐ [?](#)

Require permission to view record names in lookup fields: ☐ [?](#)

## STEP 9 ; Create user adoption (create record, view record, delete record)



The screenshot shows the Salesforce Job Tracker interface. The left sidebar has a search bar with "Search..." and a list of categories including job application trac..., recurters, jobs, candidates, applications, Reports, Dashboards, and Surya A. The main content area is titled "recurter surya" and includes a sub-header "Details". Below this, there is a table with details for the recurter "surya".

**Details**

recurter Name	surya	Owner	Surya A
Recurter Number	RN-0001		
Created By	Surya A, 25/10/2023, 2:23 pm	Last Modified By	Surya A, 25/10/2023, 2:23 pm

## STEP 10 ; Create a Report

Choose Your Tour ▾ Leave Feedback Days left in trial 30 Buy Now

JOB TRACKER Search...

job application trac... recruiters ▾ jobs ▾ candidates ▾ applications ▾ Reports ▾ Dashboards ▾ \* Surya A ▾ X

REPORT ▾ New recruiters with jobs Report ✎ **recruters with jobs** Add Chart Save & Run Save ▾ Close Run

> Outline Filters 1

Groups

GROUP ROWS

Add group...

Columns

Add column...

recruter: recruter Name x

job: job Name x

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

recruter: recruter Name job: job Name

No records returned. Try editing report filters:

- Show All recruiters.
- Edit other filters in the filter panel.

## STEP 11; Create a dashboard


Choose Your Tour ▾ Leave Feedback Days left in trial 30 Buy Now

JOB TRACKER Search...

job application trac... recruiters ▾ jobs ▾ candidates ▾ applications ▾ Reports ▾ Dashboards ▾

surya + Component + Filter Save ▾ Done

Activities by Salesperson



View Report (Activities by Salesperson)

## STEP 12; Create a Flows

←

Flow Builder

?

Select Elements

↶

↷

⚙

Auto-Layout

Run

Debug

View Tests

Activate

Save As

Save

Record-Triggered Flow

Start

Run Immediately

End

−

✎

+

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

\* Object

job

Configure Trigger

\* Trigger the Flow When:

☒ A record is created

☐ A record is updated

☐ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None



