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SALES FORCE PROJECT REPORT

COLLEGE:- SCAD COLLEGE OF ENGINEERING & TECHNOLOGY

BATCH 19

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STEP 1: CREATE A SALESFORCE ACCOUNT

The screenshot shows a Salesforce user profile for 'Surya A'. At the top, there's a banner with a desert landscape and a hot air balloon. Below the banner, the user's name 'Surya A' is displayed next to a circular profile picture of a blue cat-like creature. To the right of the name are 'Edit' and 'User Detail' buttons. Further down, there are two promotional sections: one for 'Trailhead' with the text 'Learn new skills on Trailhead, the fun way to learn Salesforce.' and another for the 'Trailblazer Community' with a link to connect with fellow Trailblazers. The bottom of the page shows a 'To Do List' section.

STEP 2: CREATE THE OBJECT (PROPERTY & LOAN)

The screenshot shows the 'Object Manager' setup page. At the top, there's a search bar with the term 'reco'. Below the search bar, a table lists a single custom object named 'recuter'. The table has columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The 'recuter' entry has 'recurter__c' in the API Name column, 'Custom Object' in the Type column, and '25/10/2023' in the Last Modified column. The 'DEPLOYED' column contains a checkmark icon.

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

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

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. Visualforce tabs allow you to 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 Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	enquiries	Alarm clock	
Edit Del	leads	TV Widescreen	
Edit Del	opportunities	Jewel	

No Web Tabs have been defined.

STEP 4; Lightning(job application tracking app)

Lightning Experience App Manager

19 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified ...	App ...	Vi...
1 All Tabs	AllTabSet		25/10/2023, 9:49 am	Classic	
2 Bolt Solutions	LightningBolt	Discover and manage business solution...	25/10/2023, 9:49 am	Lightning	✓
3 Community	Community	Salesforce CRM Communities	25/10/2023, 9:49 am	Classic	
4 CPQ Integration User Connected A...	CPQIntegrationUserApp		25/10/2023, 9:49 am	Connected	
5 Digital Experiences	SalesforceCMS	Manage content and media for all of y...	25/10/2023, 9:49 am	Lightning	✓
6 Inside Sales	Inside_Sales	Generate leads faster, and qualify and ...	25/10/2023, 9:49 am	Lightning	✓
7 job application tracking system	job_application_tracking_system		25/10/2023, 10:35 am	Lightning	✓
8 Marketing	Marketing	Best-in-class on-demand marketing au...	25/10/2023, 9:49 am	Classic	
9 Platform	Platform	The fundamental Lightning Platform	25/10/2023, 9:49 am	Classic	
10 Sales	Sales	The world's most popular sales force a...	25/10/2023, 9:49 am	Classic	

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

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Setup Home Object Manager ▾

SETUP > OBJECT MANAGER
recurer

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

Fields & Relationships

5 Items, Sorted by Field Label

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)		▼
recurer Name	Name	Text(80)		▼
Recruter Number	Recruter_Number__c	Auto Number		▼

STEP: Create a Profile

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Q profile

Users Profiles

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

Profiles

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

STEP 6 : Create a Role

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing categories like Users, Feature Settings, and Service. Under Users, the Roles option is selected. The main content area is titled "Role Edit" and "New Role". It contains fields for "Label" (HR Manager), "Role Name" (HR_Manager), and "This role reports to" (Surya). There are also sections for "Role Name as displayed on reports" and "Opportunity Access". Two radio button options under "Opportunity Access" are shown: "Users in this role can view all opportunities associated with accounts that they own, regardless of who owns the opportunities" (unchecked) and "Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities" (checked). At the bottom are "Save", "Save & New", and "Cancel" buttons.

STEP 7 ; Create a User

The screenshot shows the Salesforce Setup interface. The navigation sidebar is open, showing categories like Users, Feature Settings, and Service. Under Users, the Users option is selected. The main content area is titled "All Users" and displays a list of existing users. The table includes columns for Action, Full Name, Alias, Username, Last Login, Role, Active, and Profile. The users listed are: A_Surya (SA, suryadeviakn-k9k1@force.com, 25/10/2023, 2:13 pm, System Administrator, Active, System Administrator); Chatter_Expert (Chatter, chatter.00d5h000000snameae.hftfd7acd43@chatter.salesforce.com, 25/10/2023, 2:13 pm, Chatter Free User, Active, Chatter Free User); Gelli_Ganesh (ggell, ganeshgelli007@gmail.com, 25/10/2023, 2:13 pm, sales manager, Active, sales manager); and Sponsor_Exec (espoon, execsponsor.d4mfnnzpp49.kvskkvljcmf@example.com, 25/10/2023, 2:13 pm, End User, Active, End User). At the bottom of the table are "New User", "Reset Password(s)", and "Add Multiple Users" buttons.

STEP 8 ; Create sharing rules

The screenshot shows the Salesforce Sharing Settings page. At the top, there's a search bar labeled "Search Setup". Below it, a sidebar on the left has a "Security" section with a "Sharing Settings" tab selected. The main content area is titled "Sharing Settings" and contains a sub-section "Sharing Settings". It includes a note about organization-wide sharing settings and a "Manage sharing settings for" dropdown set to "candidate". There are sections for "Default Sharing Settings" and "Organization-Wide Defaults", which lists "candidate" with "Public Read/Write" for internal access and "Private" for external access. The "Grant Access Using Hierarchies" checkbox is checked. Below this are "Other Settings" for "Manager Groups" and "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 Application tracking page. The top navigation bar includes links for "recruiters", "jobs", "candidates", "applications", "Reports", "Dashboards", and a user profile for "Surya A". The main content area displays a record detail for a "recruiter" named "surya" with ID "RN-0001". The "Details" tab is selected, showing fields for "Created By" (Surya A) and "Last Modified By" (Surya A). Action buttons at the top right include "New Contact", "Edit", and "New Opportunity".

STEP 10 ; Create a Report

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JOB TRACER

Search...

job application trac... recurers jobs candidates applications Reports Dashboards * Surya A X

REPORT ▾ New recurers with jobs Report recurers with jobs

Outline Filters 1 Previewing a limited number of records. Run the report to see everything.

Groups GROUP ROWS Add group...

No records returned. Try editing report filters:

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

Update Preview Automatically

Columns Add column...

recurer: recurer Name job: job Name

job: job Name

This screenshot shows a report configuration interface. On the left, there's a sidebar with sections for 'Outline', 'Groups', and 'Columns'. Under 'Groups', there's an option for 'GROUP ROWS' and a button to 'Add group...'. Under 'Columns', there are two fields: 'recurer: recurer Name' and 'job: job Name', each with a delete button. The main area displays a message: 'Previewing a limited number of records. Run the report to see everything.' Below this are two bullet points: 'Show All recurers.' and 'Edit other filters in the filter panel.' At the top right, there are buttons for 'Save & Run', 'Save', 'Close', and 'Run'. A toggle switch for 'Update Preview Automatically' is also present. The top navigation bar includes links for 'job application trac...', 'recurers', 'jobs', 'candidates', 'applications', 'Reports', 'Dashboards', and a user profile for 'Surya A'.

STEP 11; Create a dashboard

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JOB TRACER

Search...

job application trac... recurers jobs candidates applications Reports Dashboards

surya

+ Component + Filter Save Done

Activities by Salesperson

View Report (Activities by Salesperson)

This screenshot shows a dashboard with a single component. The component title is 'Activities by Salesperson'. It features a gauge chart with a scale from 0 to 100. The needle is positioned at 12. Below the chart, there is a link labeled 'View Report (Activities by Salesperson)'. The dashboard has a light blue grid background. The top navigation bar is identical to the one in the previous screenshot, with links for 'job application trac...', 'recurers', 'jobs', 'candidates', 'applications', 'Reports', 'Dashboards', and a user profile for 'Surya A'.

STEP 12; Create a Flows

Flow Builder

Select Elements Auto-Layout Run Debug View Tests Activate Save As Save ?

The screenshot shows the Flow Builder interface with a flow diagram on the left and configuration panels on the right.

Flow Diagram:

```
graph TD; Start((Record-Triggered Flow Start)) --> Run[Run Immediately]; Run --> End((End))
```

Configuration Panels:

- 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.
Condition Requirements: None

