



**Smart
Internz**

JOB APPLICATION TRACKING SYSTEM

Project Based Experiential Learning Program

Job Application Tracking System

Project Description

Create a CRM Application which helps the applicant to track the No. of jobs he applied and helps him to find the job posted by the various recruiters, find the best attributes to be involved to run the process in a smooth way and easily to track.

Create a Data Model for the App

To make the existing app more efficient for the Job application we create custom objects and relationships to store and access the data more efficiently.

Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

Milestone 1- Salesforce:

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

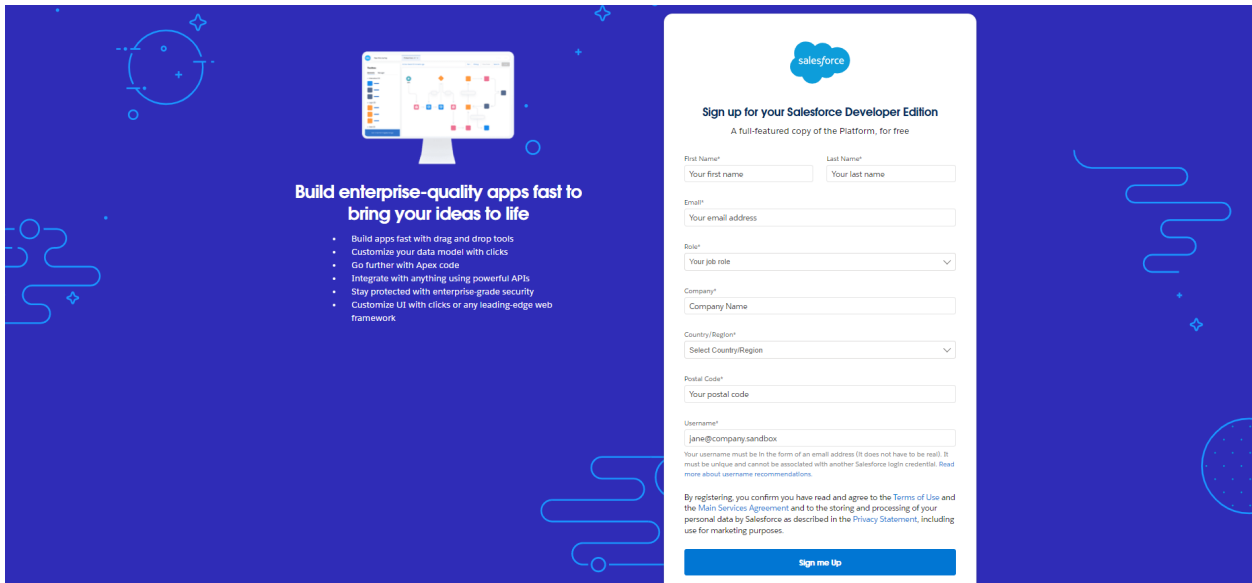
<https://youtu.be/r9EX3lGde5k>

Activity1:

Creating a Salesforce Developer Org:

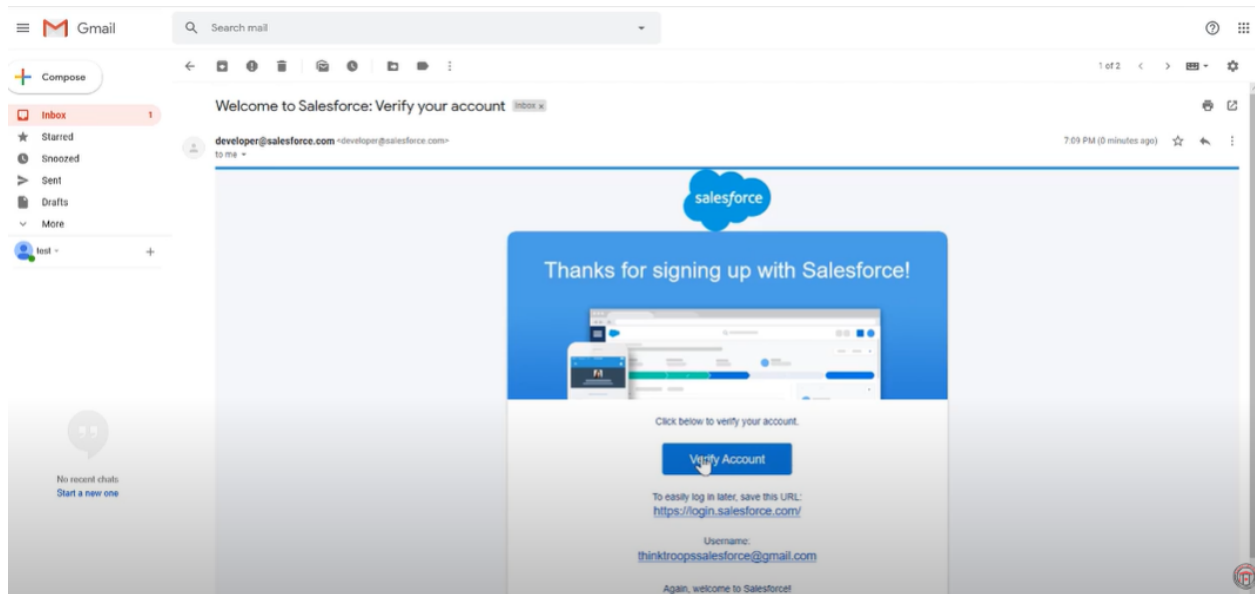
A Developer org has all the features and licenses you need to get started with Salesforce.

1. Search Developer.salesforce.com

The image shows the Salesforce Developer Edition sign-up page. On the left, there's a blue background with white text and icons. The text says "Build enterprise-quality apps fast to bring your ideas to life" and lists five bullet points: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", and "Stay protected with enterprise-grade security". Below these is "Customize UI with clicks or any leading-edge web framework". On the right, there's a white sign-up form with the Salesforce logo at the top. The form title is "Sign up for your Salesforce Developer Edition" with a subtitle "A full-featured copy of the Platform, for free". The form fields include: "First Name*" (with placeholder "Your first name"), "Last Name*" (with placeholder "Your last name"), "Email*" (with placeholder "Your email address"), "Role*" (a dropdown menu with "Your job role" selected), "Company*" (with placeholder "Company Name"), "Country/Region*" (a dropdown menu with "Select Country/Region" selected), "Postal Code*" (with placeholder "Your postal code"), and "Username*" (with placeholder "jane@company.sandbox"). Below the username field, there's a note: "Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations." At the bottom of the form, there's a disclaimer: "By registering, you confirm you have read and agree to the Terms of Use and the Main Services Agreement and to the storing and processing of your personal data by Salesforce as described in the Privacy Statement, including use for marketing purposes." and a blue "Sign me up" button.

2. Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.

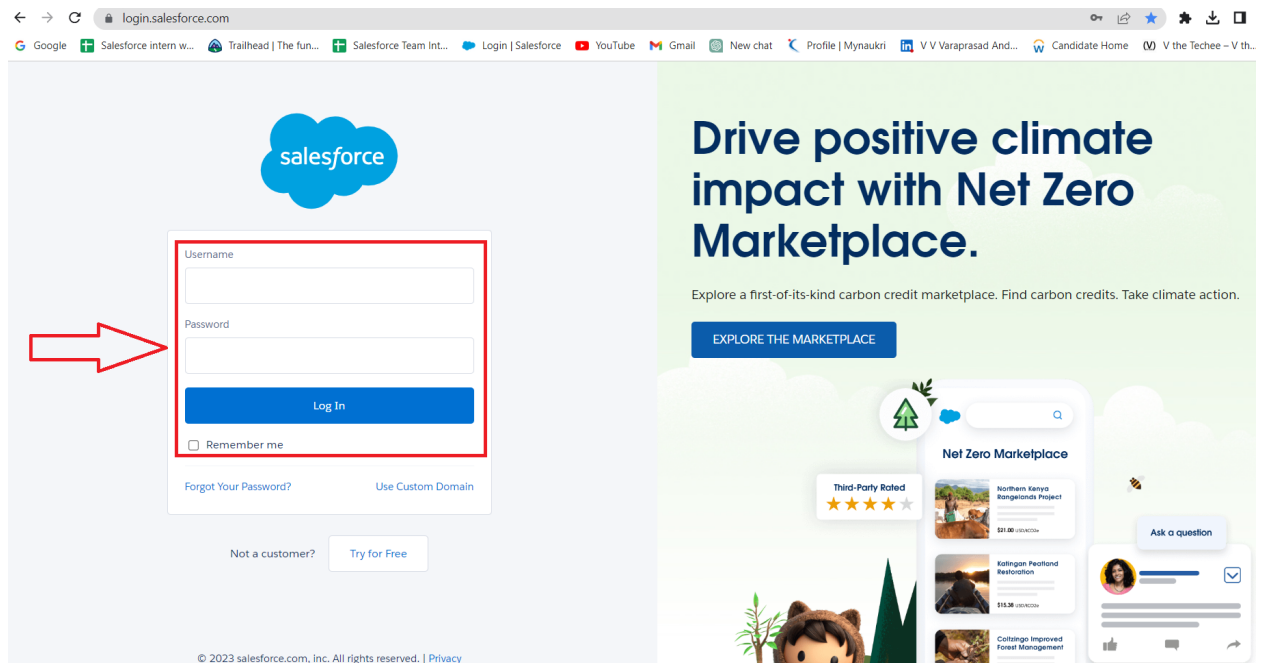
3. Click sign me up, after a few min you will reserve a mail salesforce org and by using the verify account link you can create your new password.



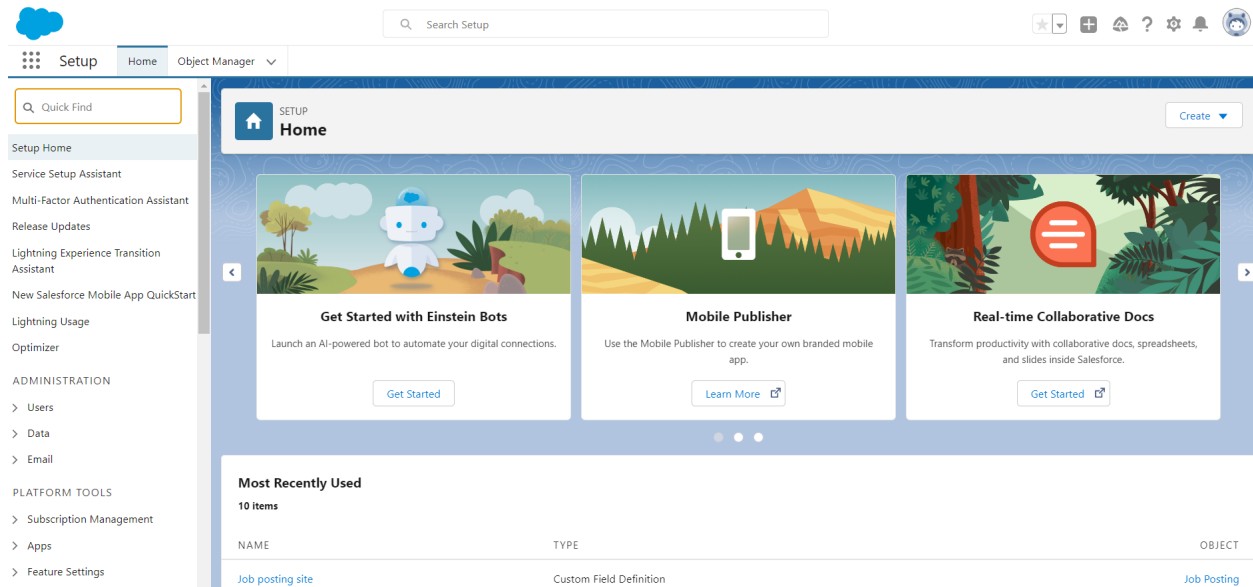
4. Click save.

5. Search login.salesforce.com

6. By using username and password you can into the salesforce org.



The setup page will appear as below.



Milestone 2-Object:

What is an 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).

Salesforce objects are of two types:

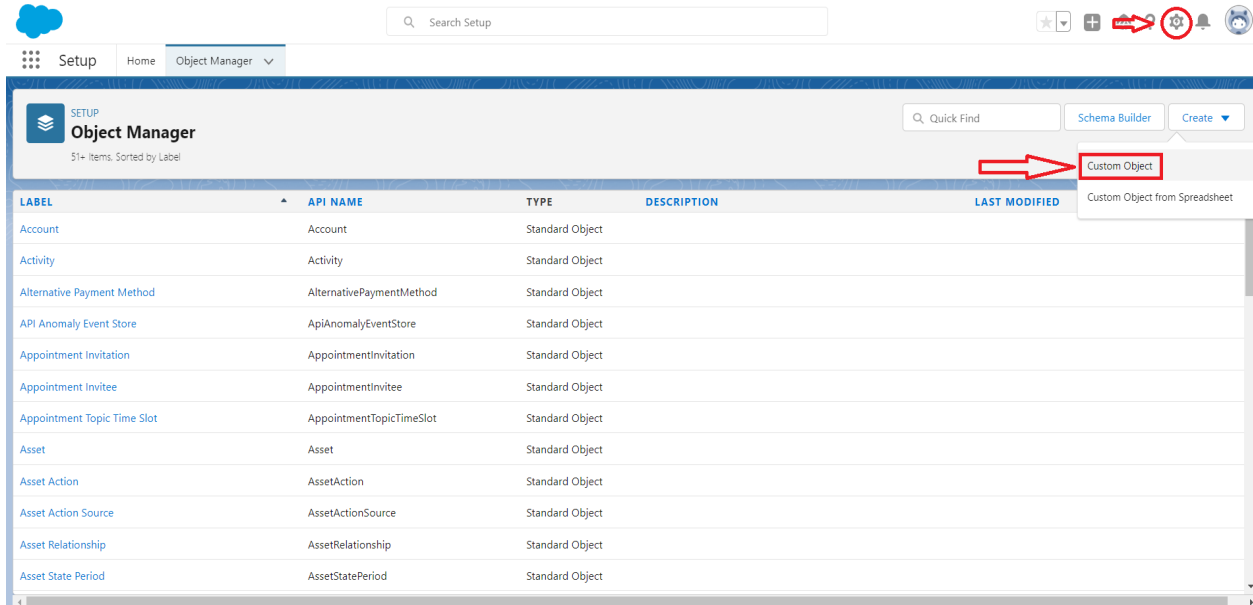
- **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Activity 1:

Create a custom object for Recruiter:

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.



Object Manager


51+ Items. Sorted by Label

Quick Find Schema Builder Create

Custom Object

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		
Asset Action Source	AssetActionSource	Standard Object		
Asset Relationship	AssetRelationship	Standard Object		
Asset State Period	AssetStatePeriod	Standard Object		

3. Fill in the label as " Recruiter ".
4. Fill in the plural label as " Recruiters".
5. Record name: " Recruiter Number"
6. Select the data type as "Auto Number".
7. Under display format enter "REC-{0000}".
8. Enter starting number as 1.
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.


SETUP

New Custom Object

Custom Object Definition Edit
Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type

Display Format Example: A-{0000} [What Is This?](#)

Starting Number

Optional Features

☒ Allow Reports

☐ Allow Activities

☒ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing [1](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

Object Creation Options (Available only when custom object is first created)

☒ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

13. Leave everything else as is, and click Save.

Activity 2:

1. Create a Jobs, Candidate, Job Application Object and Tab.
Note :- Follow the steps from the above activity

Milestone 3- Fields:

What are fields?

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.


There are 2 types of fields in salesforce:

- **Standard fields:** There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.
- **Custom fields:** The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

Activity 1:

Create the custom fields:


1. Click the object manager tab, Select the object for which you have to create the fields and relationships.


SETUP
Object Manager
183 Items, Sorted by Label


[Schema Builder](#)
[Create](#)

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			

2. From the sidebar, click Fields & Relationships. Notice that there are already some fields there. Those are the standard fields.



[Setup](#)
[Home](#)
[Object Manager](#)


SETUP > OBJECT MANAGER
Recruiter

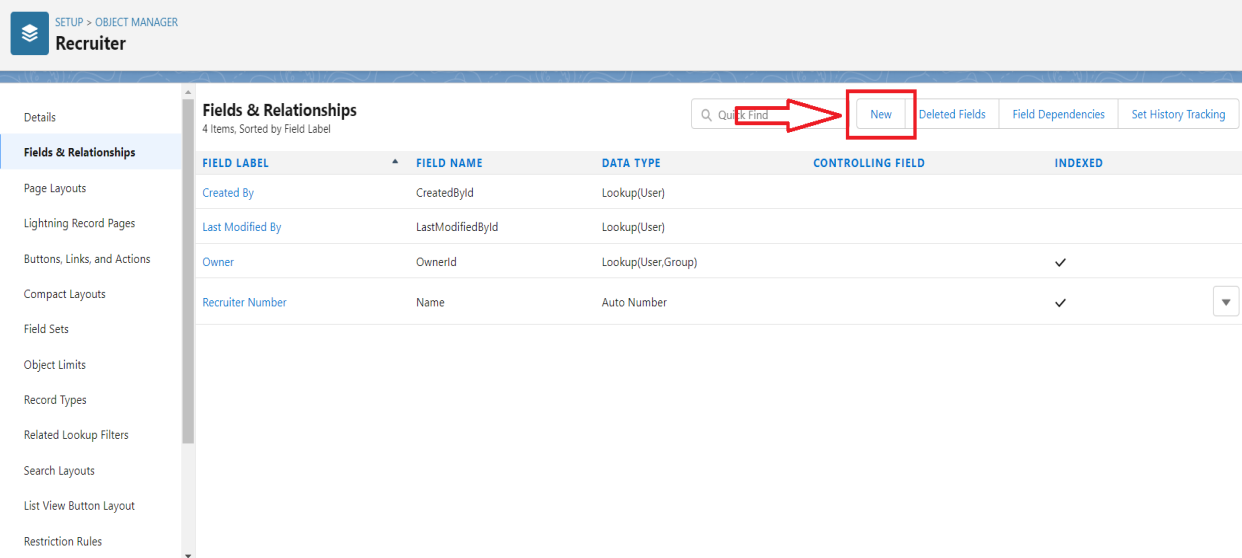
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

Fields & Relationships
4 Items, Sorted by Field Label

[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)		✓
Recruiter Number	Name	Auto Number		✓

3. Click New to create a custom field. Tip: Before creating a new field, do a quick search to make sure a similar one doesn't already exist.



SETUP > OBJECT MANAGER
Recruiter

Details

Fields & Relationships
4 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)		✓
Recruiter Number	Name	Auto Number		✓

Field Sets

Object Limits

Record Types

Related Lookup Filters

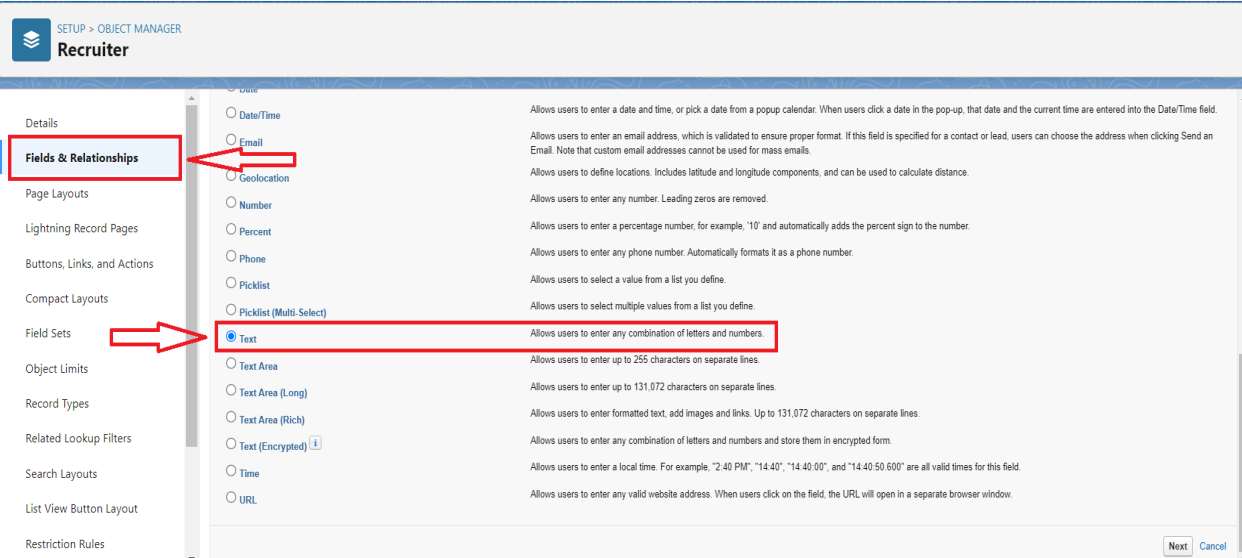
Search Layouts

List View Button Layout

Restriction Rules

4. Click on the new to create a field.

5. Choose the data type as a Text, click next



SETUP > OBJECT MANAGER
Recruiter

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

List View Button Layout

Restriction Rules

Date/Time
Email
Geolocation
Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Text
Text Area
Text Area (Long)
Text Area (Rich)
Text (Encrypted)
Time
URL

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

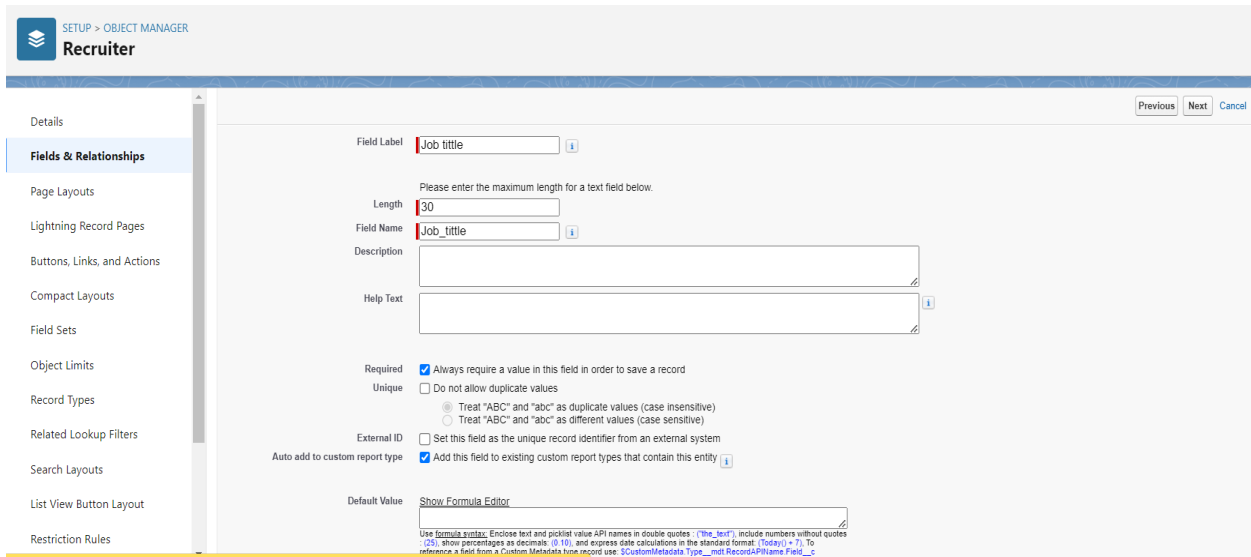
Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

6. Enter field label, length and Name and click next



SETUP > OBJECT MANAGER
Recruiter

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

List View Button Layout

Restriction Rules

Field Label: Job title

Please enter the maximum length for a text field below.

Length: 30

Field Name: Job_title

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record

Unique: ☐ Do not allow duplicate values

☒ Treat "ABC" and "abc" as duplicate values (case insensitive)

☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID: ☐ Set this field as the unique record identifier from an external system

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes. ("the_text"). Include numbers without quotes (25), show percentages as decimals (/ 10), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdb.RecordAPIName Field__c

Previous Next Cancel

7. Select the profiles to which you want to grant edit access to this field via field-level security.

The field will be hidden from all profiles if you do not add it to field-level security. Click next

8. Select the page layouts that should include this field.

9. Click save.

Activity 2:

Creation of Master-detail relationship:


1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.

SETUP > OBJECT MANAGER
Jobs

Details

Fields & Relationships

4 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)		
Jobs Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

4. Choose Master-detail Relationship and click Next

SETUP > OBJECT MANAGER
Jobs

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

List View Button Layout

Restriction Rules

New Custom Field

Step 1: Choose the field type


Specify the type of information that the custom field will contain.

Data Type

☐ None Selected Select one of the data types below.

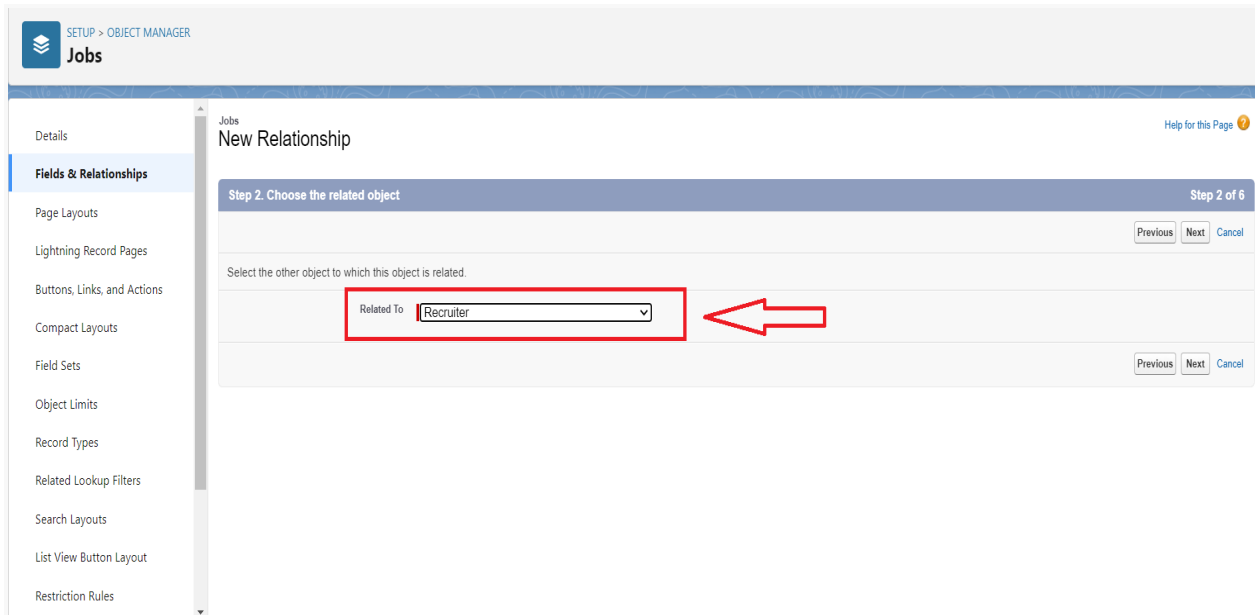
☐ Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

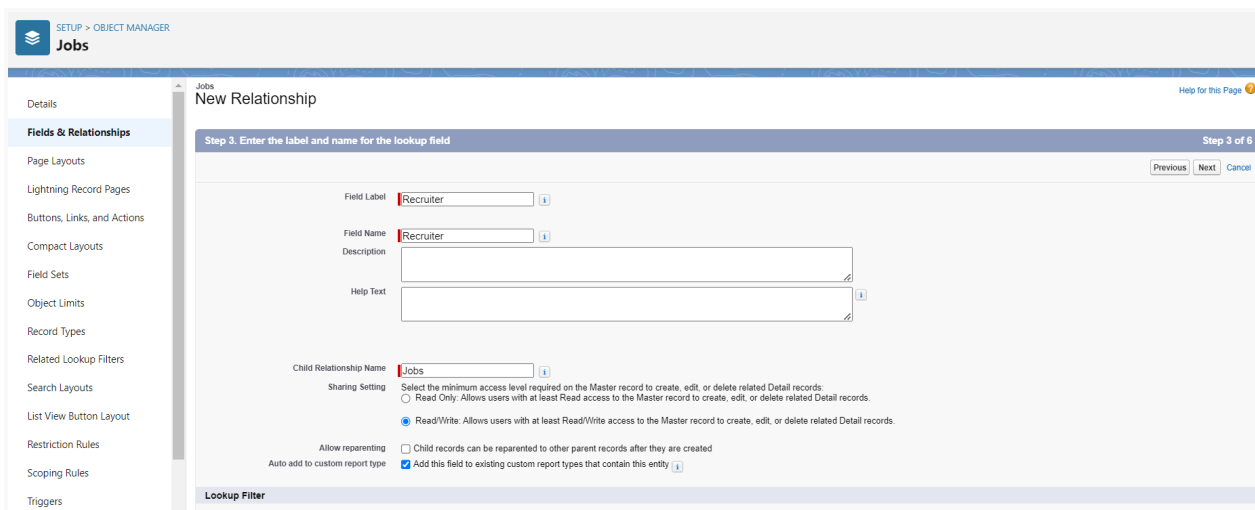
☐ Roll-Up Summary  **Master-Detail Relationship** Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

5. Choose the related object and select that object.



6. Enter the label and name for the lookup field

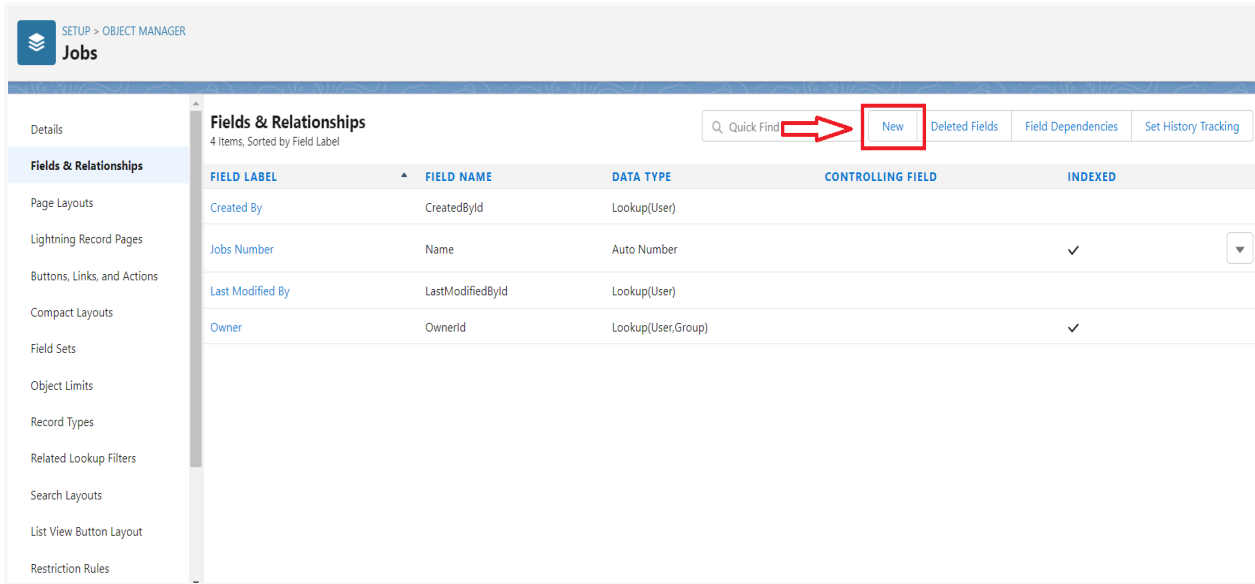


7. Click Next, Next, and Save

Activity 3:

Create a new custom field:

1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.



The screenshot shows the Salesforce Object Manager interface for the 'Jobs' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays a table of existing fields. A red box highlights the 'New' button in the top right corner, with a red arrow pointing to it.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Jobs Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

4. Choose the data type Text Area click next

SETUP > OBJECT MANAGER
Jobs

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External Lookup Relationship

- ☐ Checkbox
Allows users to select a True (checked) or False (unchecked) value.
- ☐ Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- ☐ Date
Allows users to enter a date or pick a date from a popup calendar.
- ☐ Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- ☐ Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- ☐ Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- ☐ Number
Allows users to enter any number. Leading zeros are removed.
- ☐ Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- ☐ Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
- ☐ Picklist
Allows users to select a value from a list you define.
- ☐ Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
- ☐ Text
Allows users to enter any combination of letters and numbers.
- ☒ **Text Area**
Allows users to enter up to 255 characters on separate lines.
- ☐ Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
- ☐ Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- ☐ Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.
- ☐ Time
Allows users to enter a local time. For example: "> 40 PM" "14:40" "14:40:00" and "14:40:50.600" are all valid times for this field.

5. Enter the Field Label and field name click next

Setup Home Object Manager

SETUP > OBJECT MANAGER
Jobs

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Search Layouts
List View Button Layout
Restriction Rules

Jobs
New Custom Field

Step 2 of 4: Enter the details

Field Label: Description

Field Name: Description

Description:

Help Text:

Required: ☐ Always require a value in this field in order to save a record

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes ("the_text"). Include numbers without quotes (25). When percentages are decimals (0.15), and express date calculations in the standard format: {Today} + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadataType__metRecordAPIName Field__c

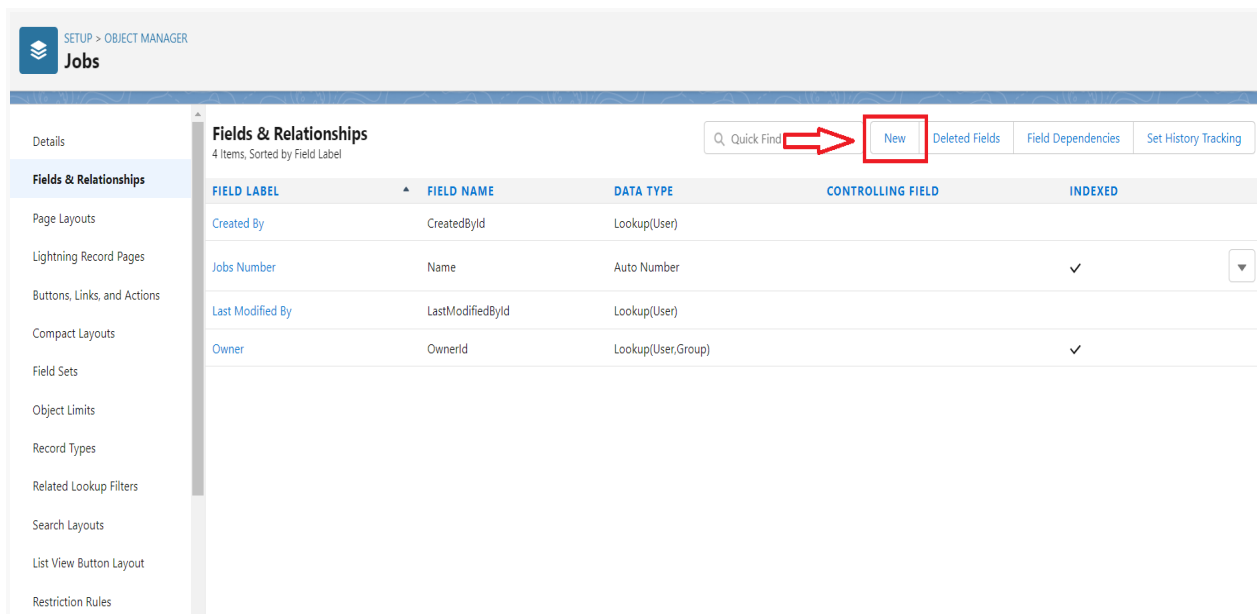
Previous Next Cancel

6. Click next and save.

Activity 4:

Create a new custom field:

1. From Setup, go to Object Manager
2. On the sidebar, click Fields & Relationships.
3. Click New.



SETUP > OBJECT MANAGER
Jobs

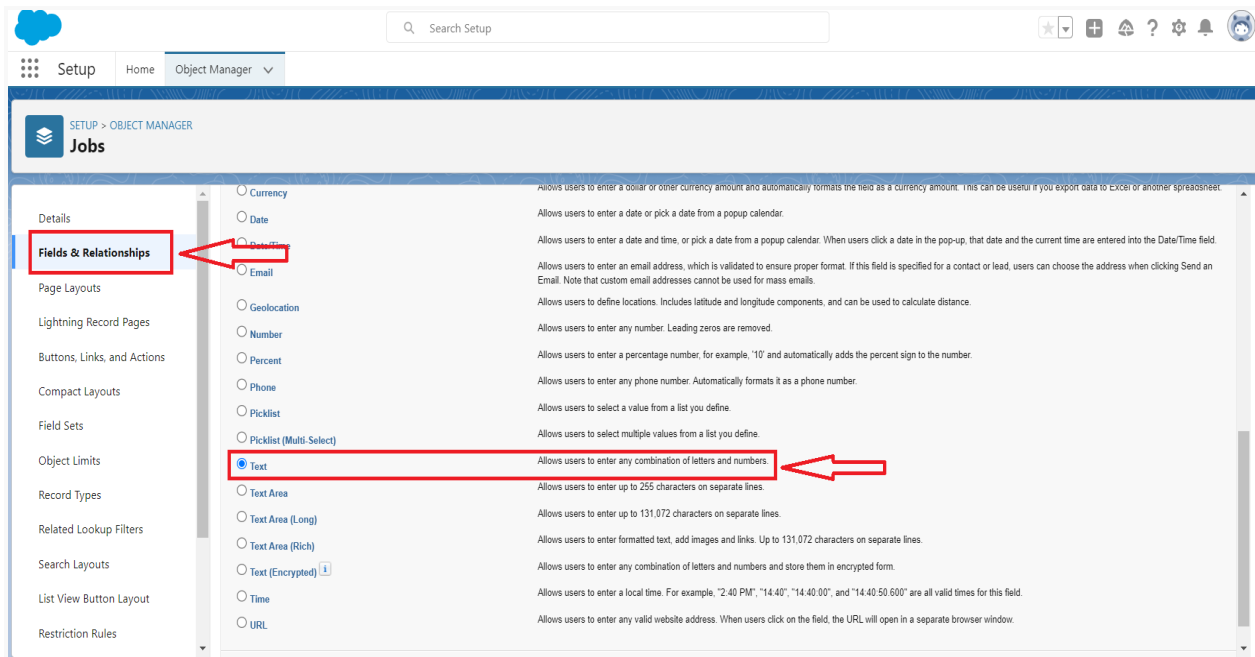
Details

Fields & Relationships
4 Items, Sorted by Field Label

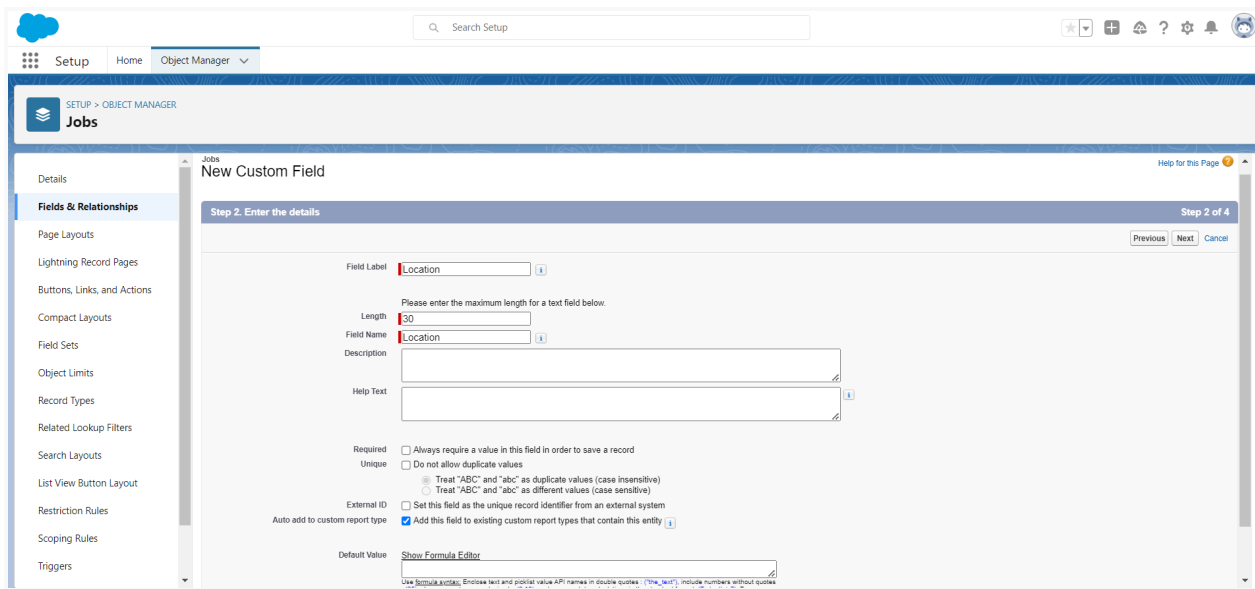
Quick Find **New** Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Jobs Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

4. Choose the data type Text click next



5. Enter the Field Label and field name click next



6. Click next and save.

Milestone 4-Tab:

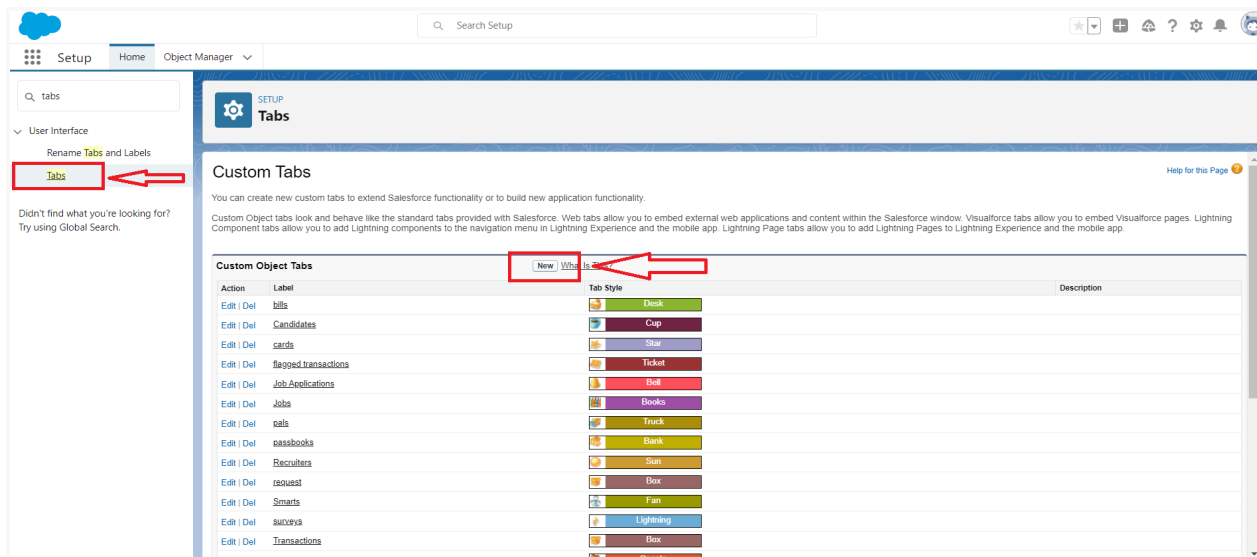
What is Tab?

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.

Activity 1 :

Create a tab :

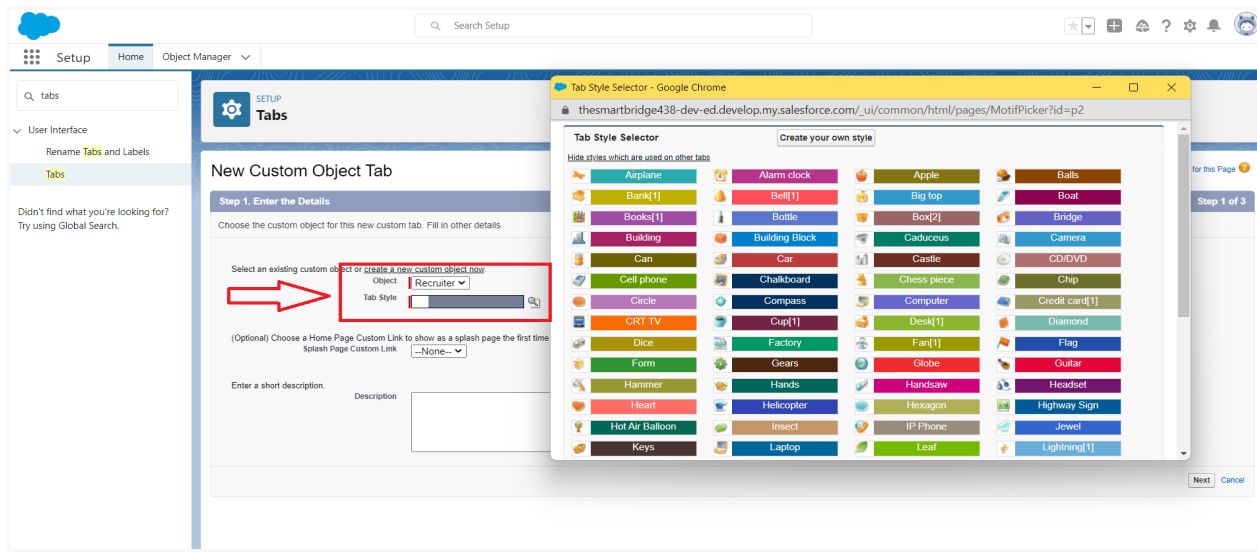
1. Click setup
2. Search tab in Quick box then, select tab
3. Click New custom object tab section



The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'User Interface', the 'Tabs' link is highlighted with a red box and an arrow. The main content area is titled 'Custom Tabs'. Below the title, there is a 'New' button highlighted with a red box and an arrow. Below the 'New' button is a table of custom object tabs.

Action	Label	Tab Style	Description
Edit Del	bills	Desk	
Edit Del	Candidates	Cup	
Edit Del	cards	Star	
Edit Del	flapped transactions	Ticket	
Edit Del	Job Applications	Doll	
Edit Del	Jobs	Books	
Edit Del	pals	Truck	
Edit Del	passbooks	Bank	
Edit Del	Recruiters	Sun	
Edit Del	request	Box	
Edit Del	Smarts	Fan	
Edit Del	suaveys	Lightning	
Edit Del	Transactions	Box	

4. Select the created object Recruiter and tab style for the new custom tab.



5. Select the profiles that visible in the tab
6. Click on custom apps to make visible.
7. Click save.

Milestone 5- Profile:

What is a profile?

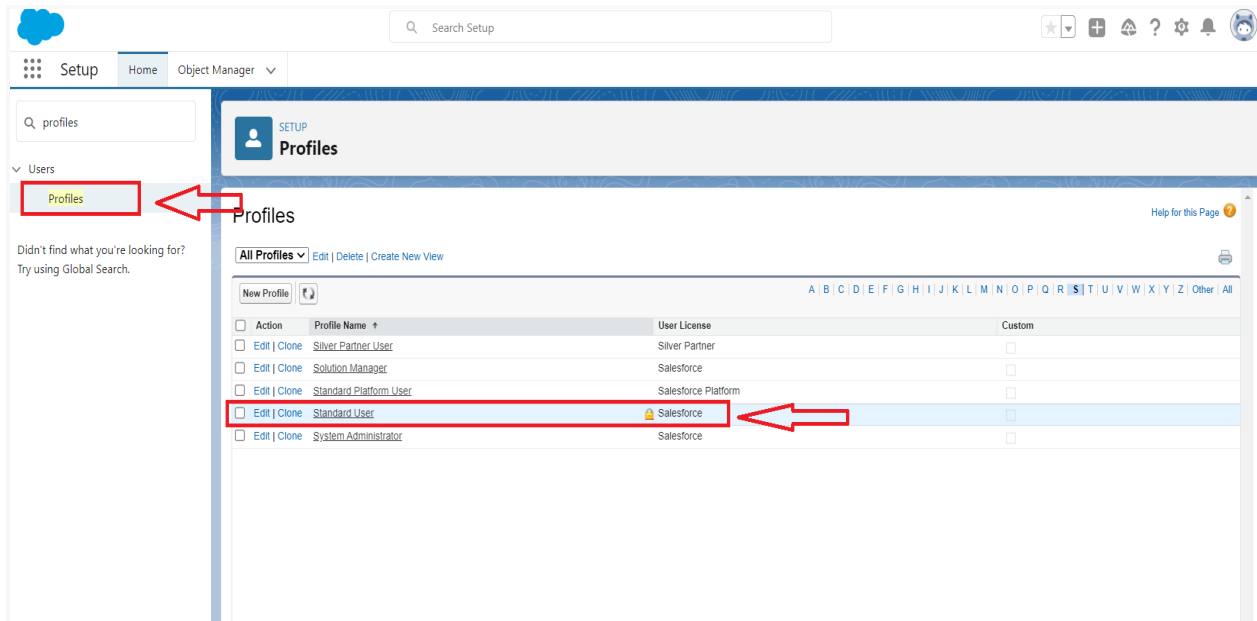
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

A profile can be assigned to many users, but user can be assigned single profile at a time.

Activity 1:

Create a custom profile :

1. From setup , enter profiles in Quick Find box
2. Select profiles.
3. Click clone.



Setup Home Object Manager ▾

Search Setup

profiles

Users ▾

Profiles

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

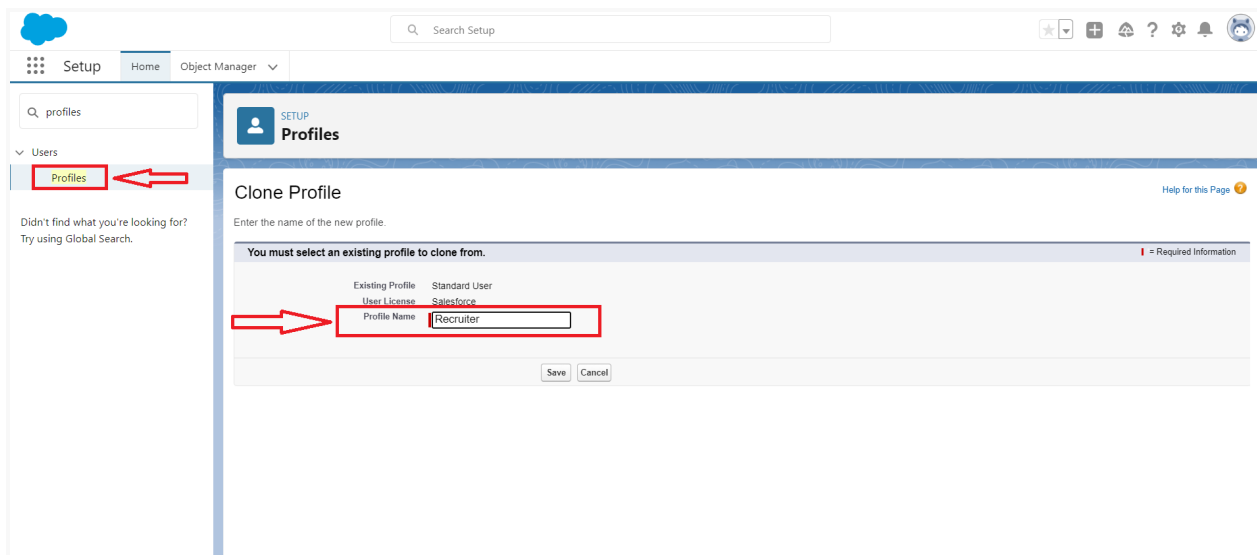
SETUP Profiles

All Profiles ▾ Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

4. For Profile, enter Recruiter.



Setup Home Object Manager ▾

Search Setup

profiles

Users ▾

Profiles

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

SETUP Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	Recruiter

Save Cancel

5. Click save.

Activity 2:

Create a profile with the profile name as “Sales Manager”.

Follow the steps from above Activity

Milestone 6-User

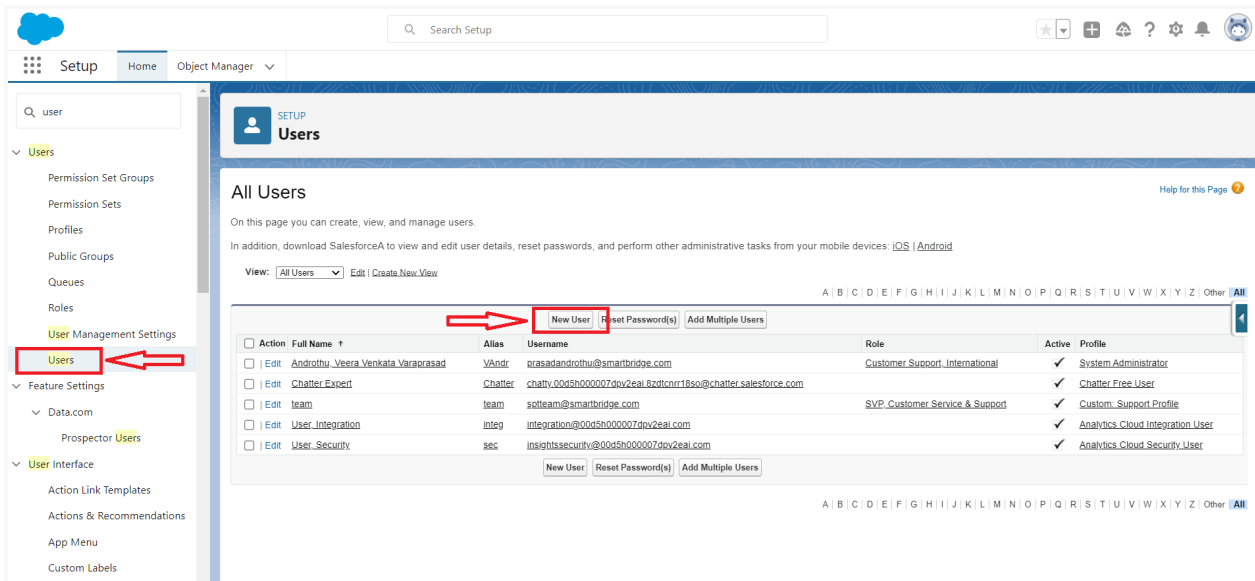
What is a user?

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Activity 1:

To Create a user:

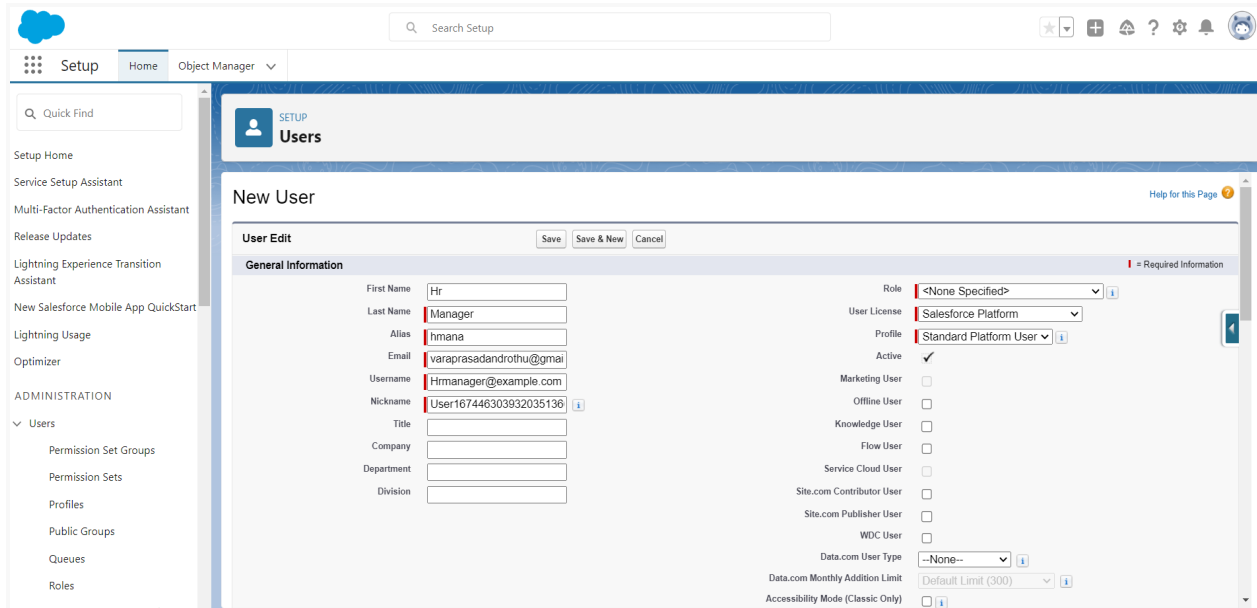
1. From Setup, enter Users in the Quick Find box, then select Users.
2. Click New User.



The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'User Management Settings', the 'Users' option is highlighted with a red box and a red arrow. In the main content area, the 'All Users' page is displayed. At the top of this page, the 'New User' button is highlighted with a red box and a red arrow. Below the button, there is a table of existing users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Androthu Veera Venkata Varaprasad', 'Chatter Expert', 'team', 'User Integration', and 'User Security'. At the bottom of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

3. Enter First name as Hr and last name as Manager.
4. Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.

5. Then create a new role Hr Manager.
6. Select user License as Standard Platform User.
7. Select profile.



8. Click save

Activity 2:

Create a user with a username as “Ganesh Gelli”, and assign him the sales Manager profile. Follow the steps from above Activity

Milestone 7-Sharing Rules

What are Sharing Rules?

Sharing rules help users to share records based on conditions. It is basically created for objects whose organization-wide defaults (OWD) are set to public read-only or private because sharing rules can only extend the access and not restrict it.

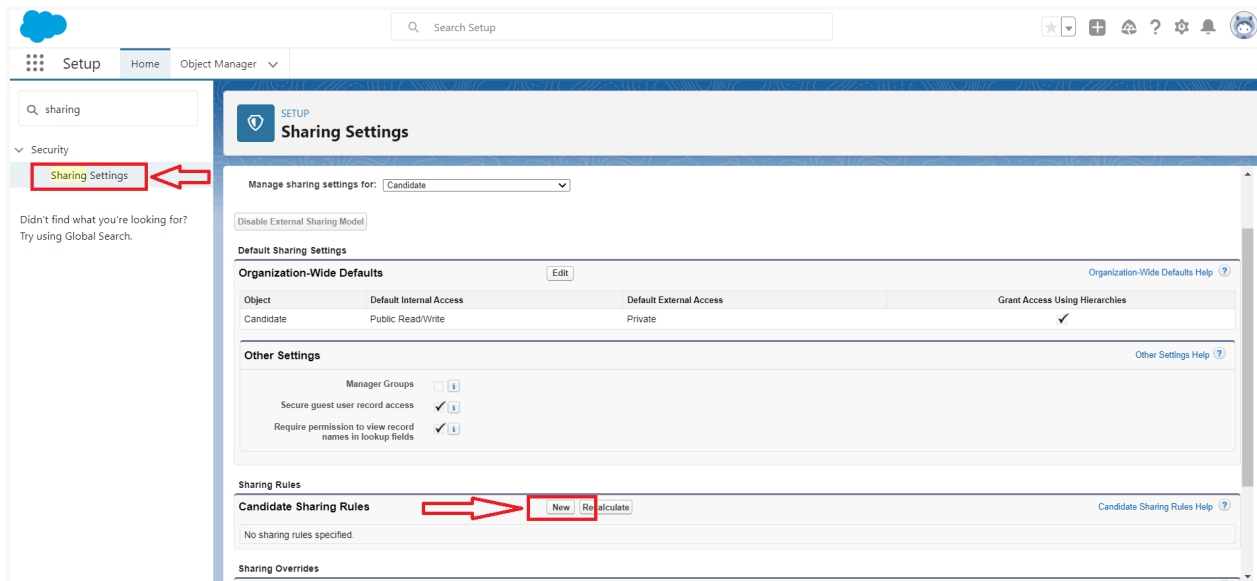
Types of sharing rules,

- Owner-based Sharing Rules
- Criteria-based Sharing Rules

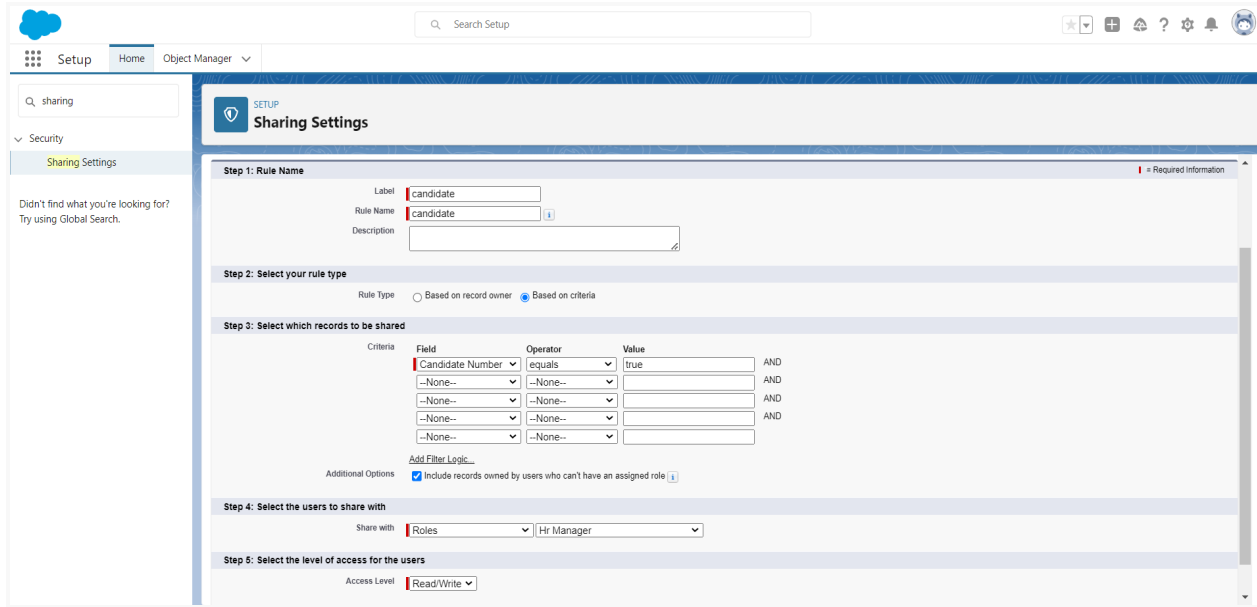
Activity 1:

Create a sharing rule

- 1) Go to Sharing Settings, which can be found under the Quick Find section.
- 2) Scroll down and find the candidate object where a sharing rule needs to be added, and then click on New to create a new sharing rule.



- 3) Add the label of the sharing rule you want to make.
- 4) Select your rule type based on the criteria.
- 5) Select the field can join immediately check field from the candidate object.
- 6) Select the operator as equal and value is true.
- 7) And in selecting the users to share with the section select roles and in that select Hr Manager.
- 8) And in the section of select the level of access for the users give the access Read/Write.



Setup Home Object Manager

Search Setup

Q sharing

Security

Sharing Settings

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

SETUP Sharing Settings

Step 1: Rule Name

Label: candidate

Rule Name: candidate

Description:

Step 2: Select your rule type

Rule Type: ☐ Based on record owner ☒ Based on criteria

Step 3: Select which records to be shared

Criteria	Field	Operator	Value	
	Candidate Number	equals	true	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND

Add Filter Logic...

Additional Options: ☒ Include records owned by users who can't have an assigned role

Step 4: Select the users to share with

Share with: Roles | Hr Manager

Step 5: Select the level of access for the users

Access Level: Read/Write

9) And save the rule.

Activity 2:

Create a Sharing Rule to Share the records of Job Application to Hr Manager with the Access of Read/Write.

Follow the steps from above Activity.

Milestone 8-Reports:

What are Reports?

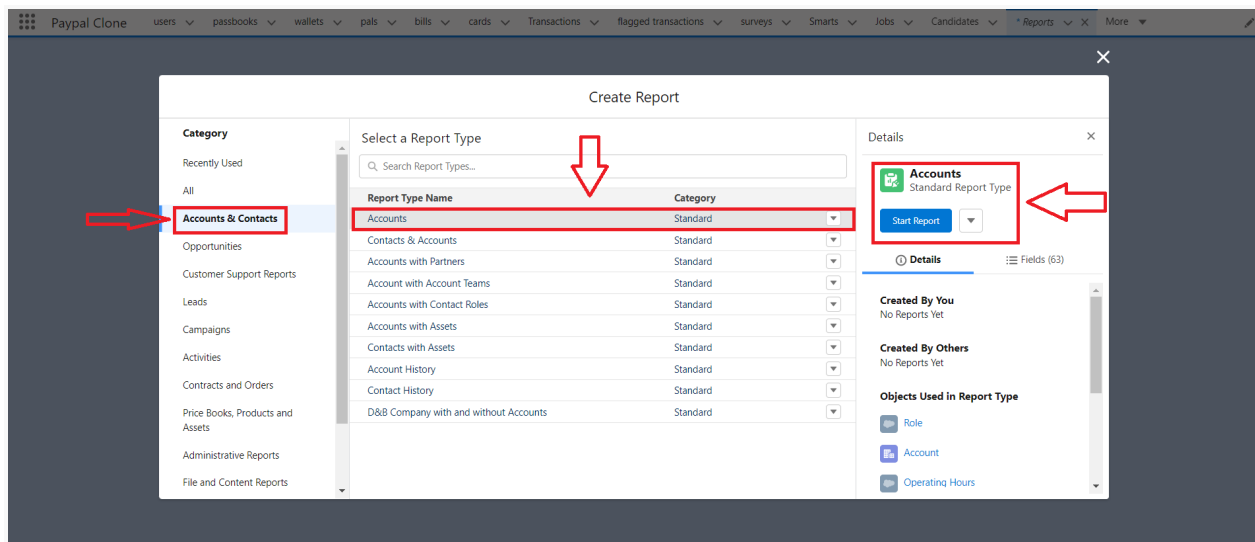
A report is a list of records that meet the criteria you define. It's displayed in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity 1:

Create a report:

Create a report that displays rating of the account and which has type and account name.

- 1) Click on app launcher search for reports.
- 2) Click on the new report and select the category has accounts and contacts.



- 3) And the report type has accounts.
- 4) In the details section select the option start report.
- 5) In the filter pane select All accounts to show me.
- 6) And All time is created.
- 7) In the outline pane, group rows select Rating and in group columns select Account Name.
- 8) In the columns section add Type and Billing city.

Paypal Clone users passbooks wallets pals bills cards Transactions flagged transactions surveys Smarts Jobs Candidates Reports More

REPORT New Accounts Report Accounts

Got Feedback? Add Chart Save Close Run

Outline Filters

Groups

GROUP ROWS

Add group...

Rating

GROUP COLUMNS

Type

Billing City

Columns

Add column...

Last Activity

Account Owner

Account Name

Billing State/Province

Last Modified Date

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

Rating	Billing City	San Francisco	Subtotal	Tanuku	Subtotal	Austin	Burlington	Chicago	New York	Singapore	Tucson	Subtotal	Lawrence	Mountain View	Paris	Portland	Subtotal	Total	
-	Record Count	1	1	2	0	0	1	0	0	0	1	0	2	1	0	1	0	2	6
Hot	Record Count	1	0	1	1	1	0	1	0	0	1	0	2	0	0	0	0	4	
Warm	Record Count	0	0	0	0	0	0	1	1	0	0	1	3	0	0	0	0	3	
Cold	Record Count	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	2	
Total	Record Count	2	1	3	1	1	1	1	1	1	1	7	1	1	1	1	4	15	

Details (15 Rows)

Last Activity	Account Owner	Account Name	Billing State/Province	Last Modified Date
10	- Veera Venkata Varaprasad Androthu	United Oil & Gas Corp.	NY	11/14/2022
11	- Veera Venkata Varaprasad Androthu	Burlington Textiles Corp of America	NC	11/14/2022
12	- Veera Venkata Varaprasad Androthu	Grand Hotels & Resorts Ltd	IL	11/14/2022
13	- Veera Venkata Varaprasad Androthu	University of Arizona	AZ	11/14/2022
14	- Veera Venkata Varaprasad Androthu	GenePoint	CA	11/14/2022
15	- Veera Venkata Varaprasad Androthu	Express Logistics and Transport	OR	11/14/2022
16				

9) Save the report by giving label name and save the folder as a public folder and save the report.

Activity 2:

Create a Report using the Objects Jobs, Candidate and Job Application.

Follow the steps from above Activity.