SALESFORCE APPLICATION FOR RECRUITING

Project report submitted in fulfillment of the requirement for

the degree of Bachelor of Technology

in

Computer Science and Engineering

By

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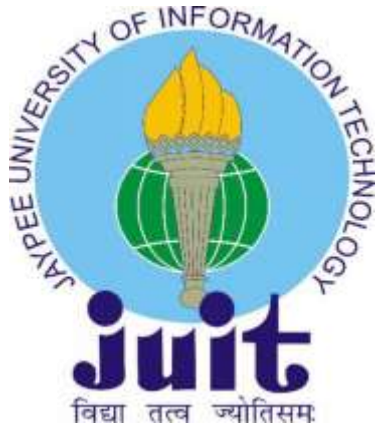
Under the supervision of

Dr. Rakesh Kanji

to



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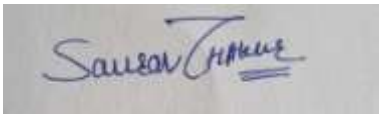
CANDIDATE DECLARATION

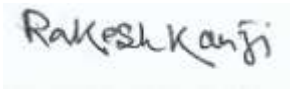
I hereby declare that the work presented in this report entitled **"Salesforce Application for Recruiting"** in fulfilment of the requirements for the award of the degree of **Bachelor of Technology** in **Computer Science & Engineering** submitted in the Department of Computer Science & Engineering and Information Technology**,** Jaypee University of Information Technology, Waknaghat is an authentic record of my own work carried out over a period from 7th February 2020 to 5th June 2019 under the supervision of **Dr. Rakesh Kanji.**

The matter embodied in the report has not been appeased for the award of any other degree or diploma.



Saurav Thakur

This is to certify that the above affirmation made by the candidate is true to the best of my knowledge.



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Dated: …23/6/2020…….

ACKNOWLEDGEMENT

I would like to express my deep gratitude to my instructor from Cognizant Technology Solutions ltd**, Mr. Shibu Kalidhasan** for giving me the opportunity to carry out this project.I would also like to take the opportunity to thank and express my deep sense of gratitude to my mentor and project guide Dr. Rakesh Kanji for his immense support and valuable guidance without which it would not have been possible to reach this stage of our final year project.

Iam also obliged to all our faculty members for their valuable support in their respective fields which helped us in reaching at this stage of our project. My thanks and appreciations also go to the colleagues who have helped me out with their abilities in developing the project.

Project Report Undertaking

Iam Saurav Thakur Roll No.: 161376 Branch: Computer Science is doing my internship with Cognizant from Feburary 7, 2020 to June 5, 2020.

As per procedure I have to submit my project report to the university related to my work that I have done during this internship.

I have compiled my project report. But due to COVID-19 situation my project mentor in the company is not able to sign my project report.

So I hereby declare that the project report is fully designed/developed by me and no part of the work is borrowed or purchased from any agency. And I'll produce a certificate/document of my internship completion with the company to TnP Cell whenever COVID-19 situation gets normal.

Signature :

Name : Saurav Thakur

Date :23/06/2020

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ABSTRACT

CRM stand for customer relationship management , and is also termed as customer success model. Salesforce is a Cloud CRM means that it will enable you to access the crm from anywhere without needing any specific infrastructure. It will only require a desktop/mobile and internet. As in today's modern world there are lot of organizations . So they need a medium to organize and interact with their customers efficiently because customer satisfaction is the only key to success. So CRM provides you that flexibility that your customers will remain upto date with the progress of the product/ issue/query. So salesforce is different from other crm's because it provide the organization to a medium so they don't have to buy the costly servers and softwares. As it can be accesed by a web browser so it cost very low. Salesforce charge according to the per user login per month. Giving the oppurtunities to new organizations to grow and be a success model. That's how Salesforce empowers the organizations.

CHAPTER 1

INTRODUCTION

1.1 Introduction to CRM

CRM stands for Customer Relationship Management.It is a business strategy that majorly focus on meeting the needs of the customer.It does this by using the advanced technologies to organise, automate and integrate the marketing, sales and customer service component of your business.CRM facilitates the interaction with the customer very efficiently.It helps the businesses to retain the customers by providing them services they need and also help in gaining new customer base. The main goal of the CRM is to increase the profit of the customer as well as business profit. Now the question arise who can use a CRM? The answer is anyone who wishes to gain competitive business advantage can use the CRM.The sales , marketing,customer support or any line of the business can use the CRM for better management of its customers and increase its profitability and also of its customers.This can be very well understand by an example : Let's say a customer contact to the customer support of your business and logs a complaint about the issue he/she is facing with the product the customer executive logs the problem. Now next time again the same customer contact the customer support regarding the update of the issue, but this time he came to interact with a different executive . So the thing now is previously the other excutive have heared from the customer and the new customer have no idea about the situation . And it will be very unprofessional and rude to ask the customer again his issue and try to find about the case. So to rescue the CRM comes as it logs about the customer and his issue and make a case. So when he contacts the customer support again the case can be fetched again and the details can be shared easily with the customer.Also CRM helps in many ways to manage the customers with efficiency. For another instance it keep track of potential customers and let organization to keep upto date with them. A CRM softaware can be limited to the organization server as well as can be reside in the cloud. Cloud has competitive edge as it provide the flexibility as well as the strong computational capacity to the user organization. That's why most of the start-ups goes with the cloud CRM's so as to save the money from not buying their own servers. Cloud CRM help them to grow exponentially by letting them focussing on their customers efficiently and provide them state of the art services.Cloud CRM's charge them only based on the number of users log in, which will comparatively very cheaper then having to set up servers.

1.2 Cloud Computing:

In this the storage and the computing power is provided to the user over the internet. The data centers can be situated at any part of the world. It provides the raw computing to the user . The user can compute the hard and time consuming jobs over the cloud using the clouds computing powers.

There are lot of benefits for using cloud computing:

Cost:

Since all of the our data is stored on the servers and we do not have to but storage devices it reduces the cost of the storage devices. Also if we want to perform the computations on some large set of data we need to have strong processors, but using the cloud computation power this cost has also cut down to several times. This is how cloud computing is cost efficient.

Security:

It may worry us that our data is stored in servers , but there are lot of security features that prevent from leaking of our data to hackers. As there always a team of professional who are working round the clock for ensuring the safety of our data. Our data is enctyped by some complex cipher techniques so that in case any leakage occurs the data will be un readable. Meaning that only the authorized people can read that data.

Performance:

Performance of any system can be measured by its ability to perform the computation fast and the outputs of the computations should be accurate. Talk about the performance of the clouds, as they have the best computers which are fast and accurate to the very best.They provide far more speed and accuracy. Also the machines are updated time to time with softwares as well as hardware making them top among there peers.

Flexibility:

One of the most important benefit of clouds is that you can access the data from anywhere provided you are authorized to do so. This is the most important feature of the cloud which attracts a lot of the organizations move their business to the cloud.The agility of the cloud resulted in its growth. You can access it from any geographical place provided you have internet.

This topic further extends to the types of cloud computing.There are three types of cloud computing. And to note down not every type is suitable for a particular business. If one wants to deploy its system over the cloud , then one needs to be very clear with the requirements of its business. It should be very clear about its(cloud) architecture.

The three types are:

Public:

These types of clouds are owned and operated by a third party party organizations which tends to provide the cloud services. Some examples of public cloud are: Salesforce, MS Azure etc. They provide the services like storage and computions over the internet.In this type of cloud the hardware and software supporting the infrastructure is maintained by the companies that own the cloud(service provider).And we can access services of these cloud simply by typing the address over the browser.

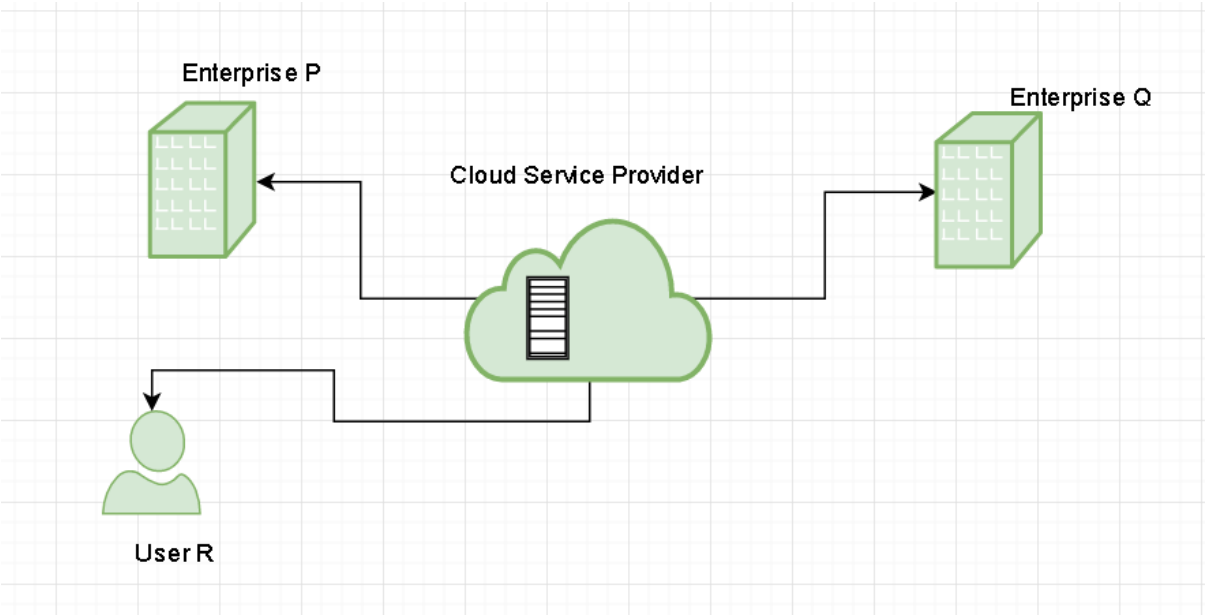

Fig 1: Public cloud[1]

Private:

In these type of cloud the storage and the computational resources are generally present at the user's site and is only used by the user organization. Sometimes it also happens that the organization pay other organization to host their private cloud.

In these type of clouds the maintenance of the hardware and software that support the infrastructure is done by the user organization.

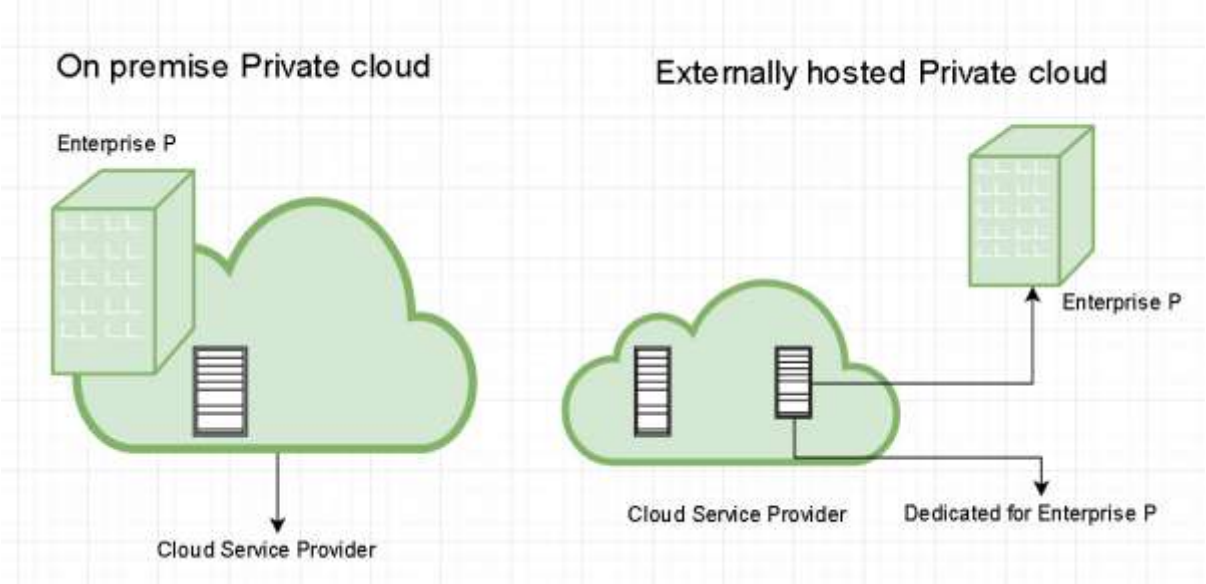

Fig 2: Private cloud[1]

Hybrid:

A hybrid cloud is a combination of public and private cloud.In this type of clouds the applications can be shared among the public and private clouds.It provides more flexibility to the organizations. This can be very well understood with the help of the diagram.

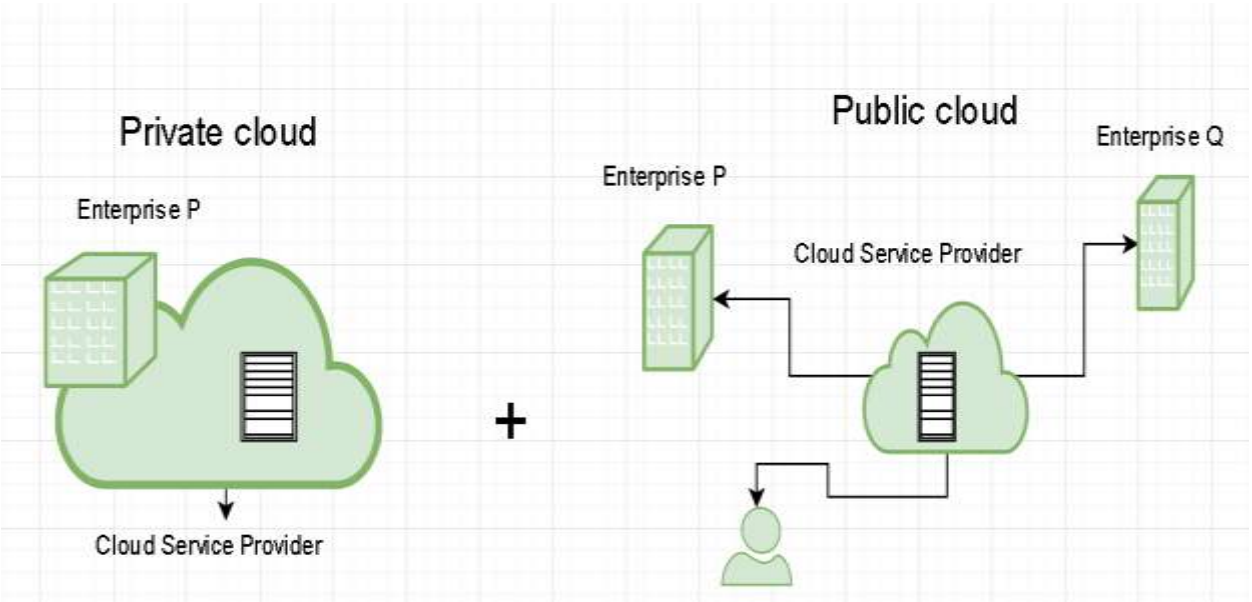

Fig 3: Hybrid cloud[1]

Cloud Services:

There are three type of cloud services.Again the requirement should be very clear in mind that what the business requires.

Infrastructure as a Service (IaaS):

This category is the most basic category of the service. In this the infrastructure like storage,servers, networks, operating systems are provided.The users can rent out the service they want. You just pay for the service and you get it.

Example: MS Azure,Google Compute Engine etc.

Platform as a Service(PaaS):

It provides the users an environment for developing, testing or delivering the applications. It is an safe environment because it lets the developer ,tester to chck if the new patch is safe . That is without affecting the current state of the system.

Example: Salesforce,Google apps

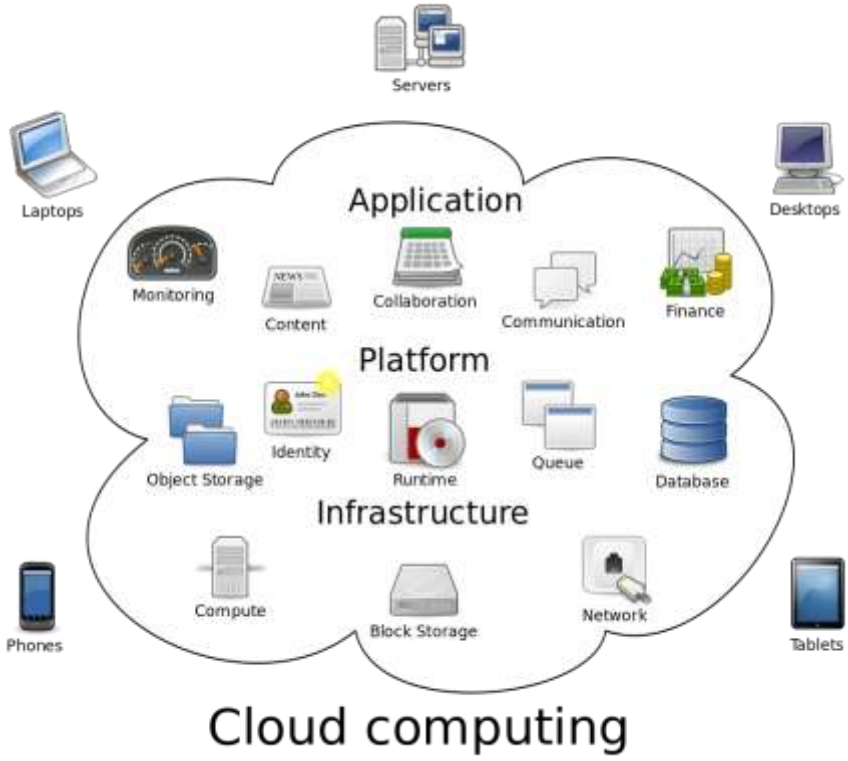

Fig 4: Cloud services[2]

CHAPTER 2

SALESFORCE

2.1 Introduction:

Salesforce is a cloud based CRM which brings the businesses and customers together and help both of them to grow their businesses and ultimately the growth of the profit.Reason that the salesforce is leading in the market is due to its services like it tracks the customer interactions and the information related to them at one place.It makes decision fast and also keep up with the updated information.Also the 24*7 customer support is the key to its success.To keep up with the demand of the market salesforce push updates/features three times in a year.[3]

To understand about the salesforce lets deep dive in to it. In salesforce there are few terms that are used frequently and the way they manage the customers are:

Leads:

In salesforce the people who are interested in your product or service are called leads. Salesforce keeps the data about the leads at one place so that it helps you to turn him in to customer.

Opportunities:

In salesforce a opportunity is created when a lead is converted. All the leads who show further intrest in the service or product are called an opportunity. Now the process has gone to the price negotiation phase.

Accounts:

These keep the information about the companies your organization do business with.There are two type of accounts. First is the business account which store the data about the companies. And second account is personal account which store data about the person. As some time organizations do business with people.

Contacts:

Contacts are the people of the companies you do business with.Contacts are related with the accounts. In salesforce all the data of the individual is stored so that you can keep track with the requirements of the business.

Case:

In salesforce the case is issue/query/feedback which is created when a customer interacts with the customer support. The customer is tagged with the case so that if he again contact the customer support he don't need to tell the whole scenario again.

2.2 What Salesforce have for its customers ?:

Sales Cloud:

Can help in to increase the number of companies data meaning that increased number number of accounts .Which ultimately will increase the business by attracting the new customers and also retaing the existing customer base.Execution of the deals would be faster as the data of the customer and the interaction will be at one place.As the platform if equipped with Artificial Intelligence so the Execution will be fast as the there is process automation.

Conversion rate is very high as the information about leads and their requirements is very clear.

Service cloud:

Customers are always the top priority , so here in service cloud the problem/issues/ queries of the customers are solved fast.As it is equipped with AI so most of the queries are pre answered. Also it provide live chat with customer support so as to solve the problem as fast as possible.

Marketing cloud:

Automate the tasks so that the right message can be delivered to the right entity over the some media.Emailing becomes automated so that your reach is diversified and efficient.Everythis is connected to the cloud the data about the lead from his twitter or any other social media so you will always have a edje over the others. [4]

2.3 Salesforce Edition:

Now you need to select the best edition for your business depending upon the requirements of your business.So the edition that salesforce provide are:

Lightning essentials:

This CRM can be used by uto 5 users and also this CRM cost very less that is 25$ per month per user. That's why this is very suitable for small business. Essential comes with almost

Everything like accounts, leads , opportunity,case, contacts. Also with automate data entry.Also to train the users it comes with tutorials and the trailheads. Trailhead is a platform where one can learn about salesforce by practicing the modules and projects.

Lightning professional:

This CRM can be used by the teams of any size.This edition cost 75$ per month per user.In this we can track the sales, marketing. Additionally this comes with the forecast of the sales which are accurate.Also there are customizable reports and dashboard where we can see the sales in varios formats and also other data.

Lightning Enterprise:

This is a sales CRM and is customizable to a very deep extent.Again can be usd for teams with any size and this costs 150$ per month per user.This addition comes with lot of automation like business prosess automation using workflows. Alsoin this edition integration is very easy with the help of web services API.Again the tracking of the sales is very easy and efficient.

Lightning Unlimited:

This CRM comes with ultimate sales CRM and support. It cost around 300 $ per person per month.Also this edition comes with ultimited online training.Also 24*7 support is provided for better customer experience.Also 100 admins services provided. Also admins have access to unlimited sandboxes.

2.4 Versions in salesforce:

Salesforce has two versions which are classic mode and lightning. Both these come with their unique features. Whereas classic mode is bit premittive, the lightning mode is bit new and dynamic and automates the task and is bit easy to use.

Classic and lightning:

Classic mode come first and is bit primitive. This is less user friendly also the interface is old fashioned.And also it misses many features that lightning have. Whereas lightning mode is more user friendly and have very good interface. Also lightning experience automates the tasks and have many features which classic mode lacks.

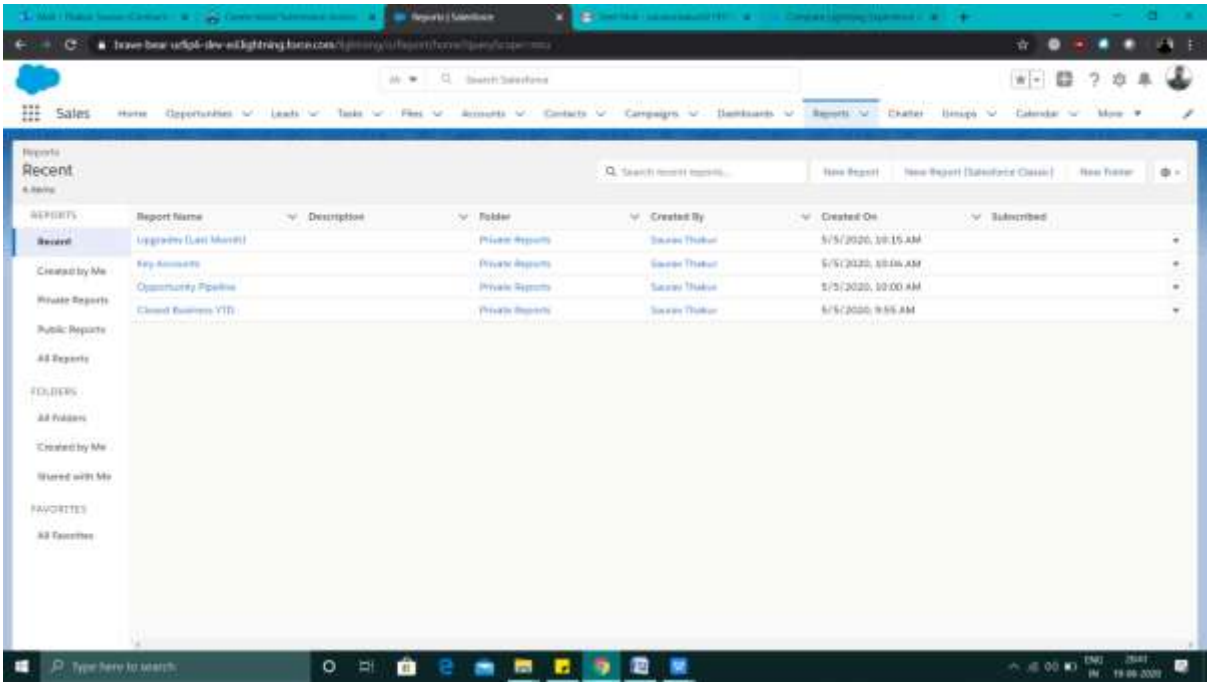

Fig 5: Salesforce Lightning

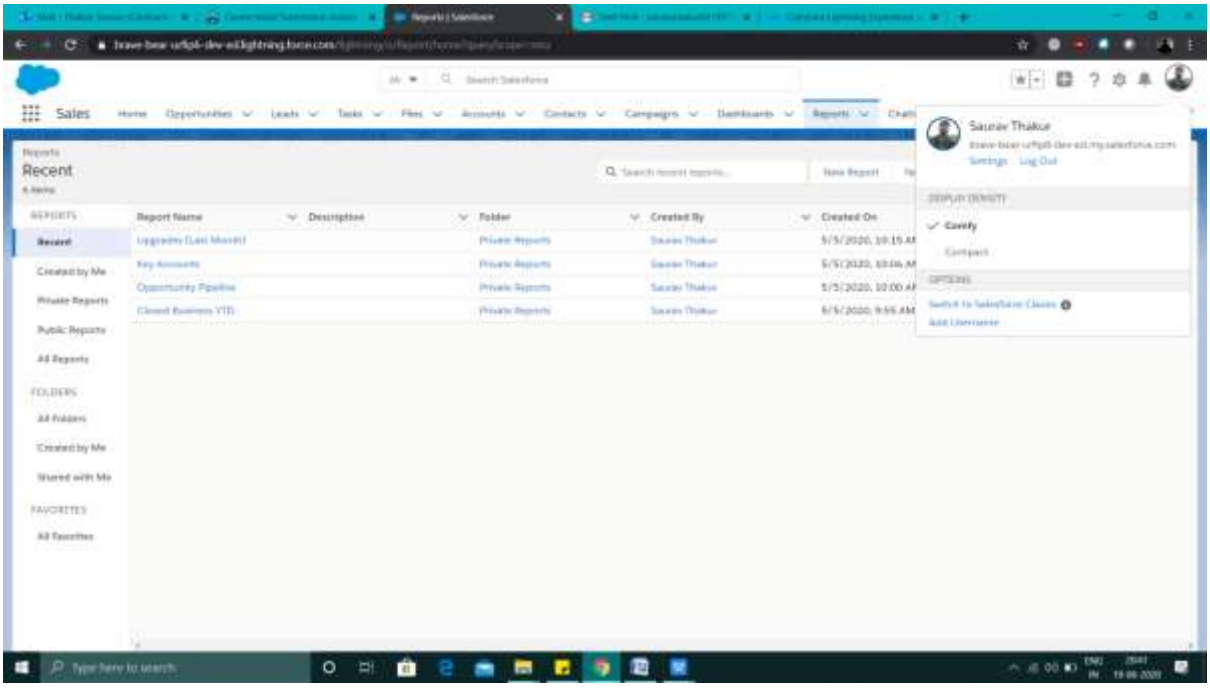

Fig 6: Changing to Salesforce Classic

Profile icon->Switch to Salesforce Classic

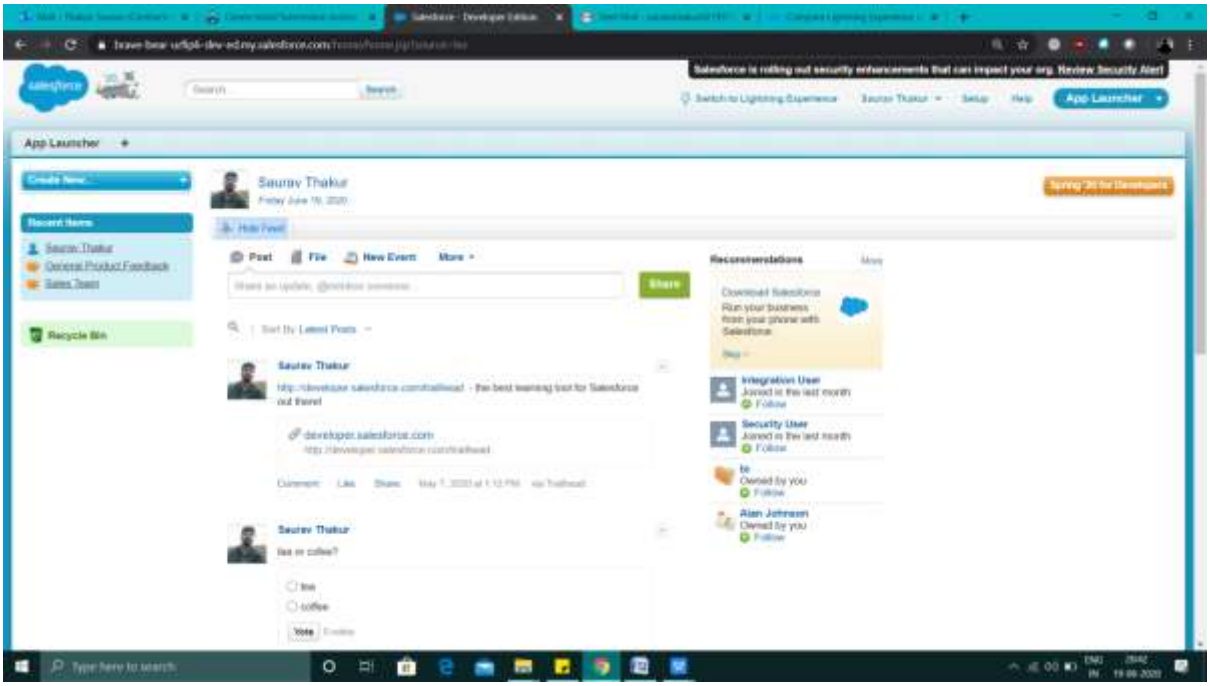

Fig 7: Salesforce Classic

Can jump back to Salesforce Classic from the Switch to lightning Experience.

2.5 Salesforce basics:

To understand briefly about Salesforce CRM lets deep dive in to it by understanding way it works the basics of salesforce.

Locale settings:

One can set the various settings based on organization working country. One can set the language, time of working, fiscal year,customer support timings. Meaning that user can define how things goes in organization.

Profiles:

Basically means what job functions,also enables the visibility in the organization.Also different permissions are associated with different profiles.Standard profiles can not be deleted and their permissions can not be edited.

Org-wide defaults:

It represent the basic access to the data that is available for all users. It is used to restrict the access on records.Can be used for both custom and standard objects.

Role hierarchy:

It simply means that a user who is higher in hierarchy should have access to all records below it. To put it straight a manager should be able to see all the records below him in hierarchy.

Four levels of access:

Public read/write/transfer is only available for case and leads.

Public read/write

Public read/only

Private

Object relationships:

Master detail:

This means that detail record can not exist without master. i.e no independent existence.Also the sharing rules are inherted by the detail record from the master. The number of the master detail relationship is limited to per object . Only two Master detail relationship allowed.

Lookup:

This type of relationship is used where you are not sure if relationship required or not.This type of relationship is when we want to relate the detail record with many parents.

Fields:

Salesforce provide eight types of formula fields:

Text

Date/time

Date

Currecy

Checkbox

Percent

Number

Time

Field history tracking:

First of all we need to enable this feature, to enable this go to setup then account then build then filed history>check the box saying enable tfield history history.

Auto resposnse rule:

These are set of conditions to automate the email to be replied back to the leads,cases.

Creating a Acoount:

Open the lightning and click on Accounts tab . After the accounts tab gets opened on the top right corner click on new, After clicking on new a pop up window will appear in which you will be asked to ender the data. Enter the data about account and click save.

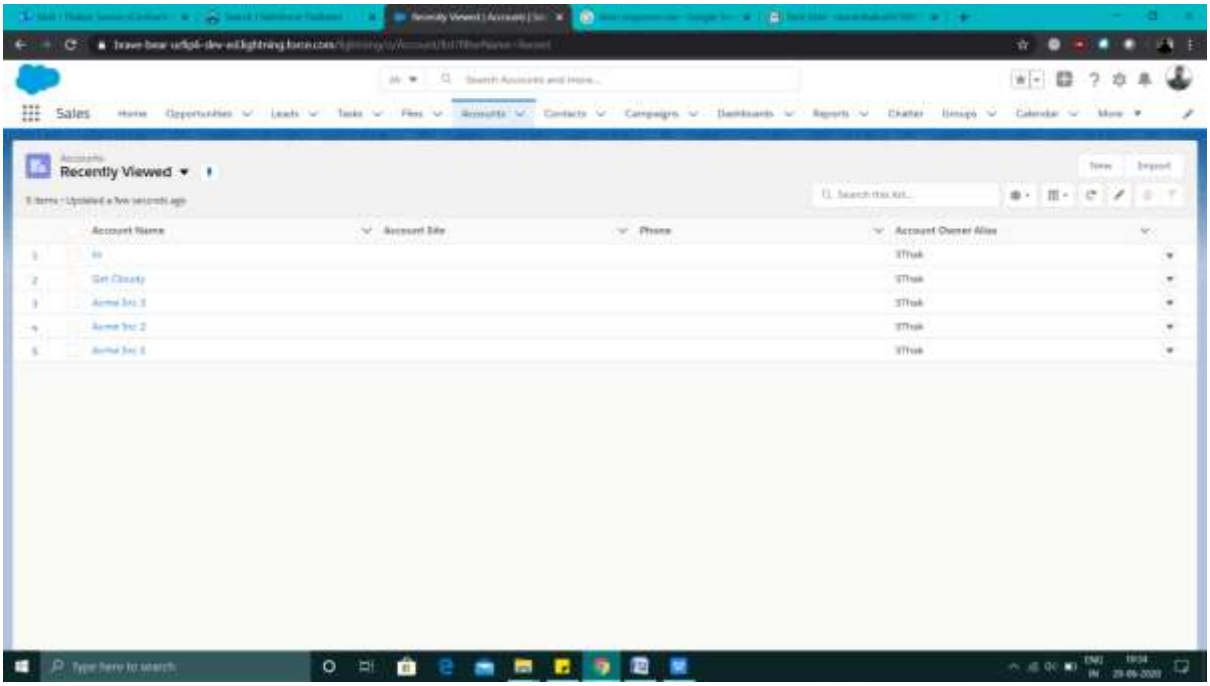

Fig 8: Account tab

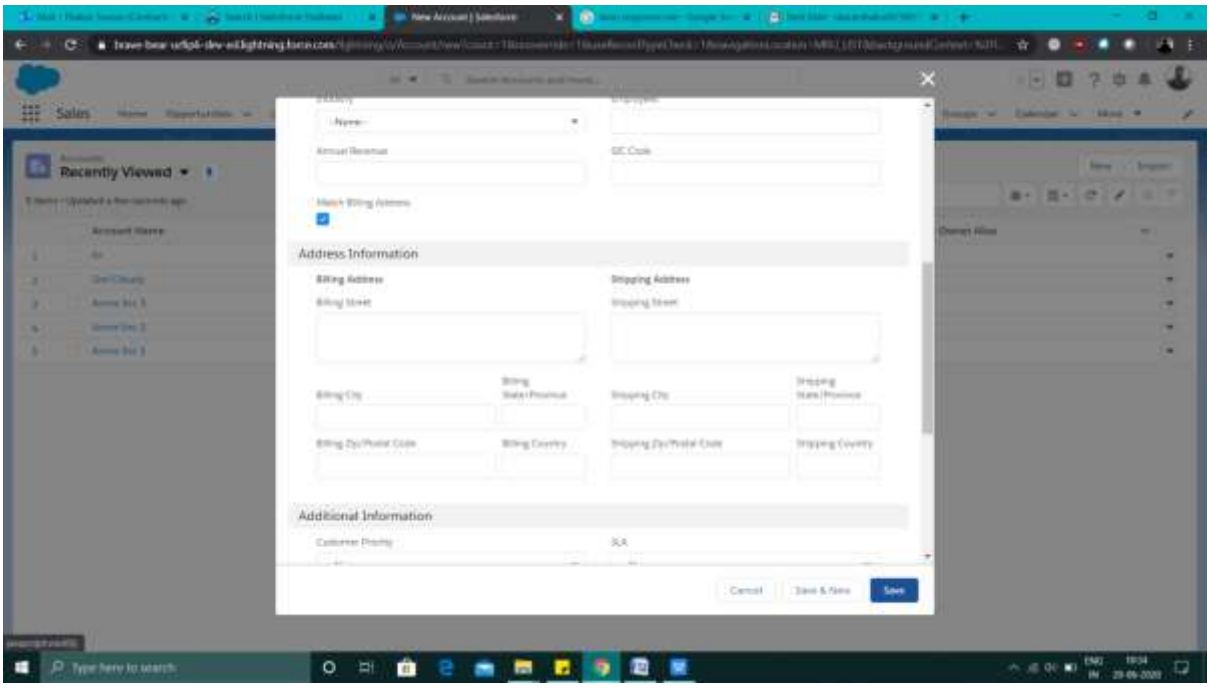

Fig 9: Pop up window asking the details

In the same way new leads , contacts, cases and oppurtunities can be created as they are present on the window shown below.

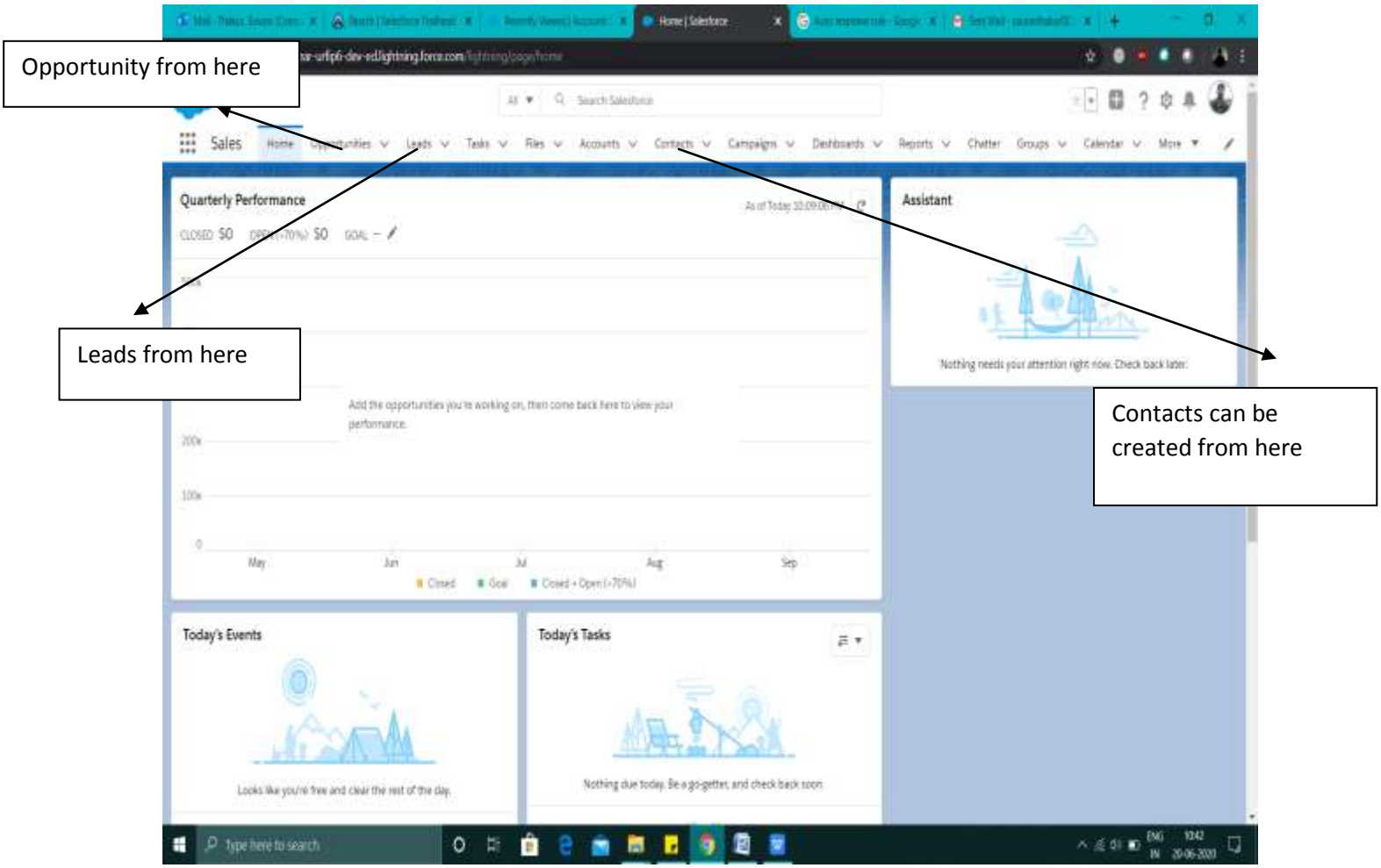

Fig 10: Showing how to create leads,contacts and opportunities

Creating a custom object:

Custom objects are similar to the standard objects but have additional properties. Administartor (salesforce)can create the custom object and can define their properties.Also he is the one responsible for the relationship of the custom objects.

To create a custom object follow the following steps:

Go to setup from the homepage.

In the setup click on the tab Object manger.

In the Object manager tabs you can dee the standard objects and also custom objects.

In Object manager click on create on top right corner.

After you click on the Create it will ask you to crate a custom object cleck on that and a new window gets opened.

Now enter the label name and same in plural.

Also enter the other details too like description datatype etc.

After filling all click save . after this a window will open asking you to select the tab style.

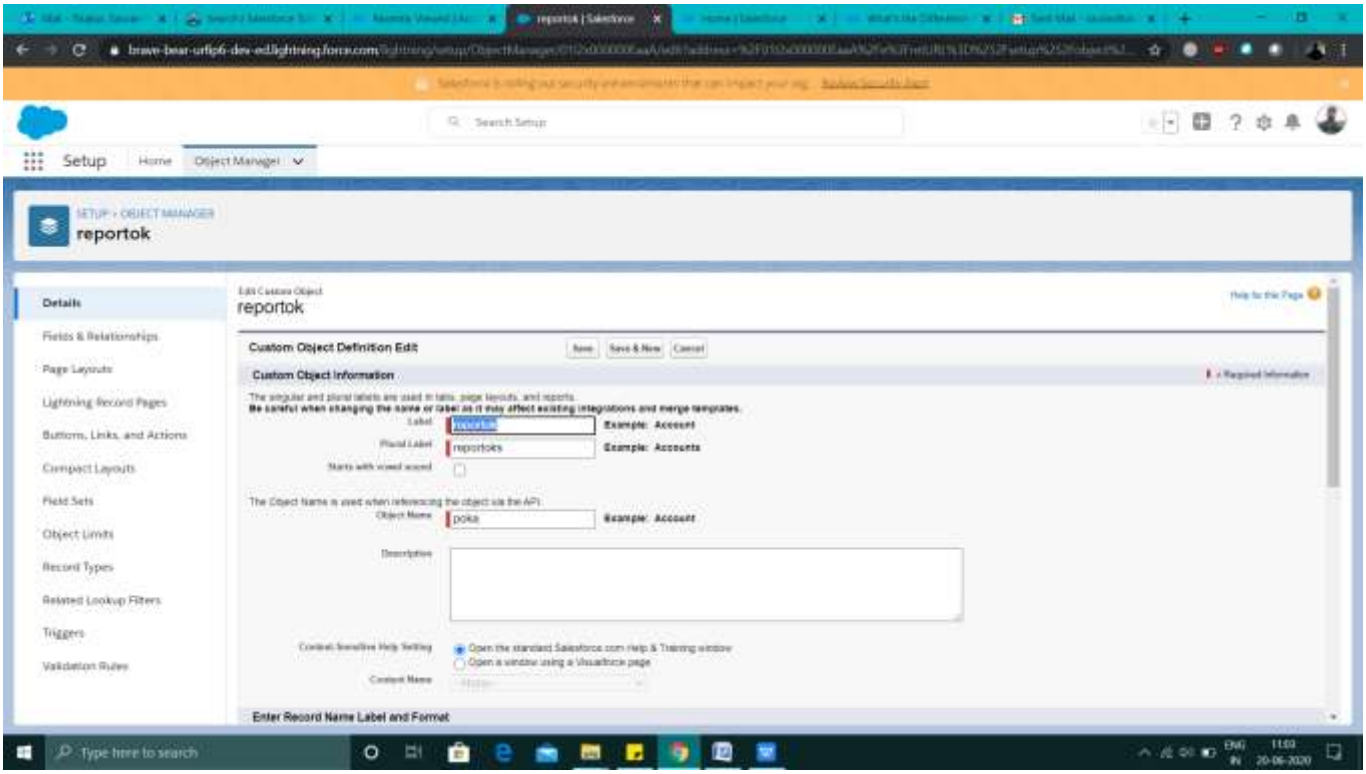

Fig 11: Figure showing a custom object reportok

Now as we have created a custom object now we need to add field and relationships to this object which we can do by:

First of all find the object reportok in object manager tab and select it.

After selecting it selecting it select Fiels and relation ship from left side of window.

Now to click on new button on right side. After you click new a window will open asking you to select a datatype which means that what type of data will be stored in that field.

After you select the datatype click next.

Now it will ask you different details like the name of the field, legth allowed in text (as I have selected text as the datatype) description, required etc.

Set them according to your needs and click next.

Now a window asking the permission will open and we set that from here, after this we save and new field is created.

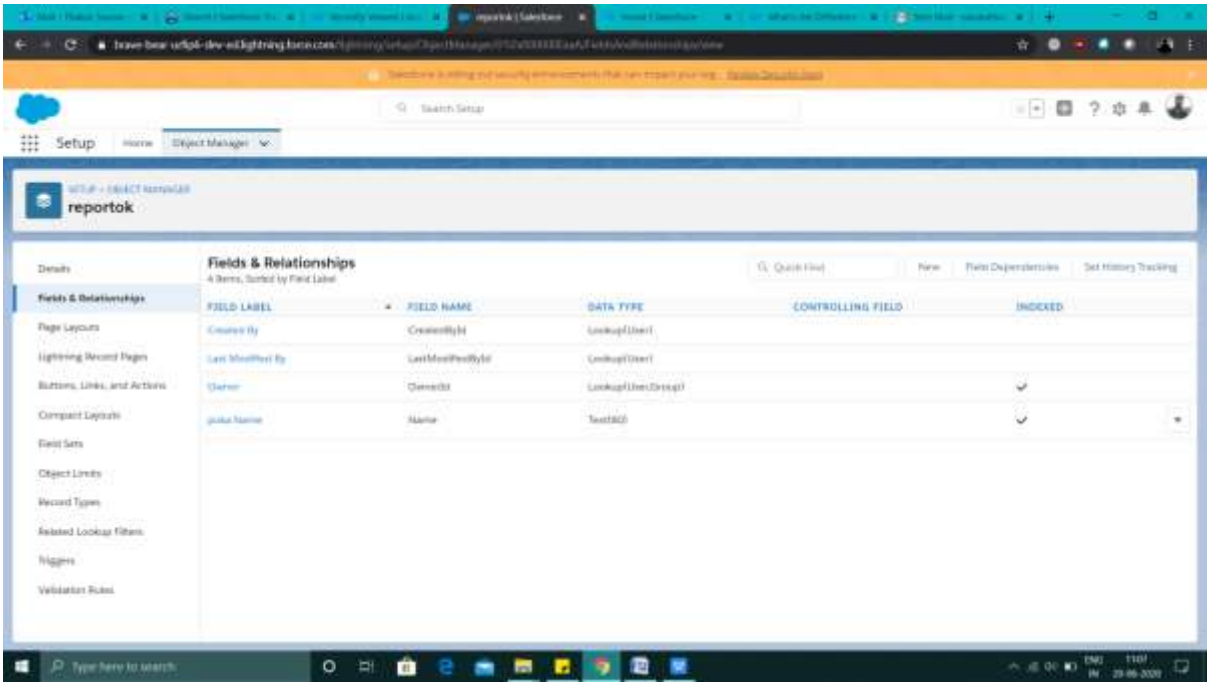

Fig 12: initially no fields

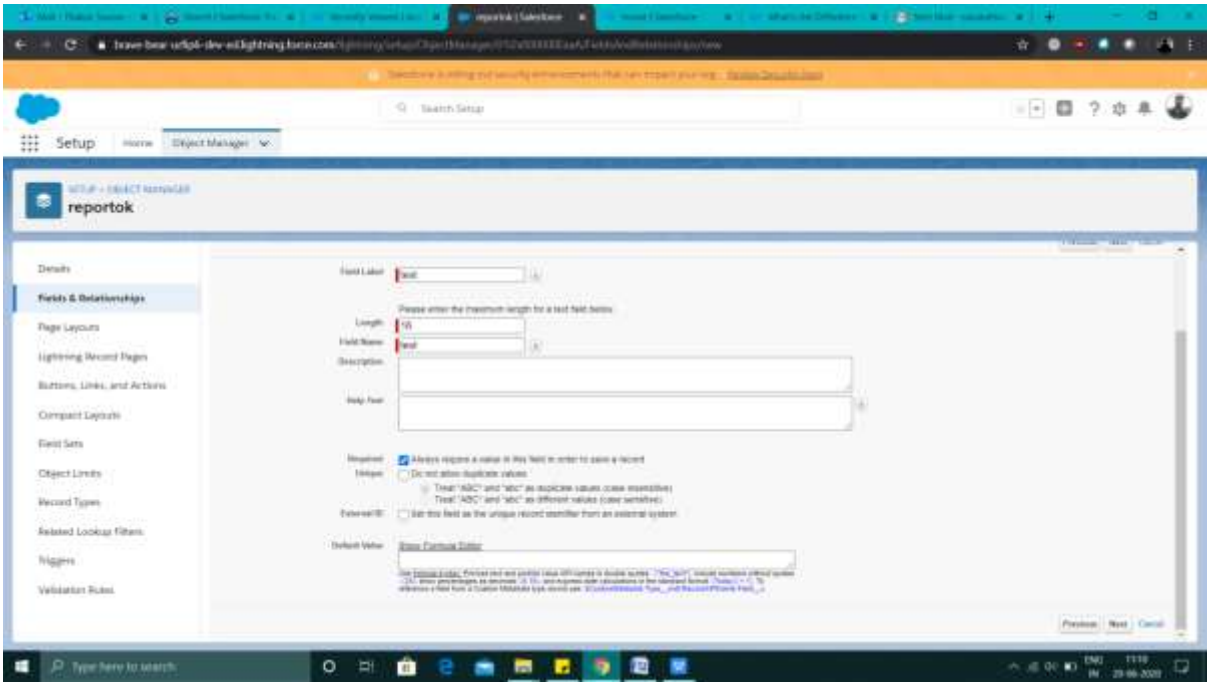

Fig 13: Data entry

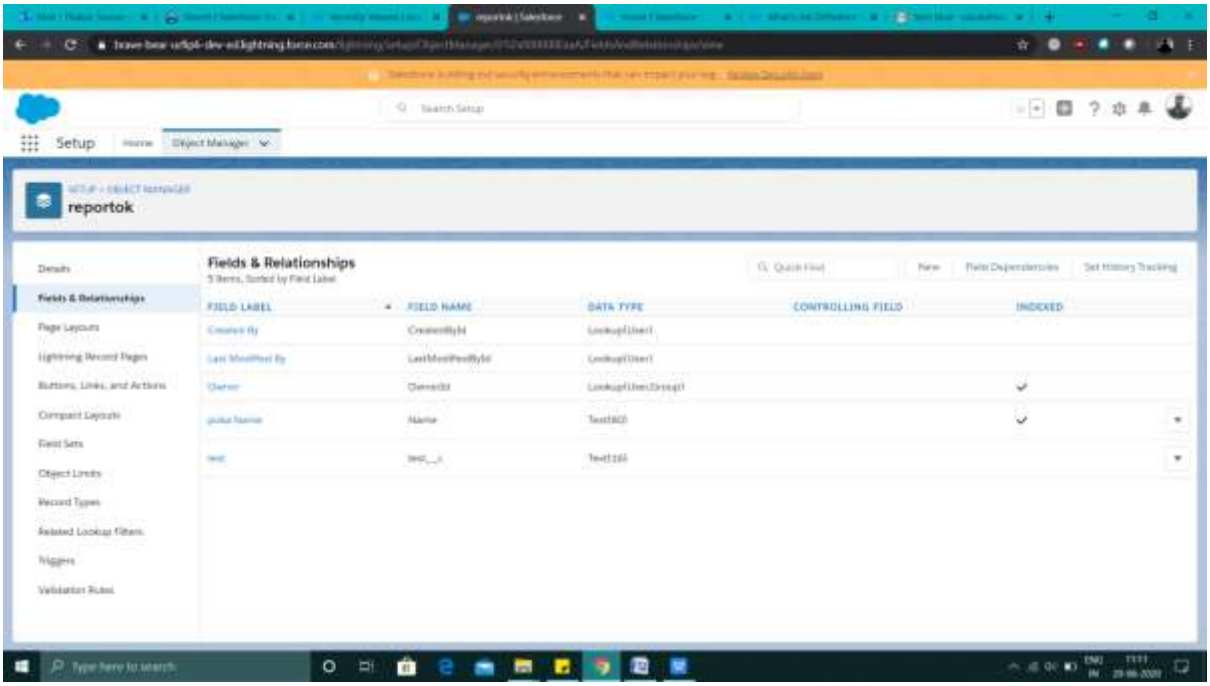

Fig 14: test field is created

Creating validation rules:

These rules checks the data that's being entred in the fileds. A mathematical formula is used , which compute on the data being entred and return true or false.

Lets create a validation on standard object account:

First of all select Account from the object mangaer.

After that click on Validation rules on lft side of window.

Window will open and you are asked to write a formula.

Lets say we want to only see comapies havin revenue greater the 10000000 so we write formula annual revenue>10000000

And save the rule.

Now we will only let the users to make entry of companies which have annual reveue greater then the desired amount. These rules help us in great extent when we want to filterize our data entry so that only we can focus on the data that is beneficial for the growth of the business.

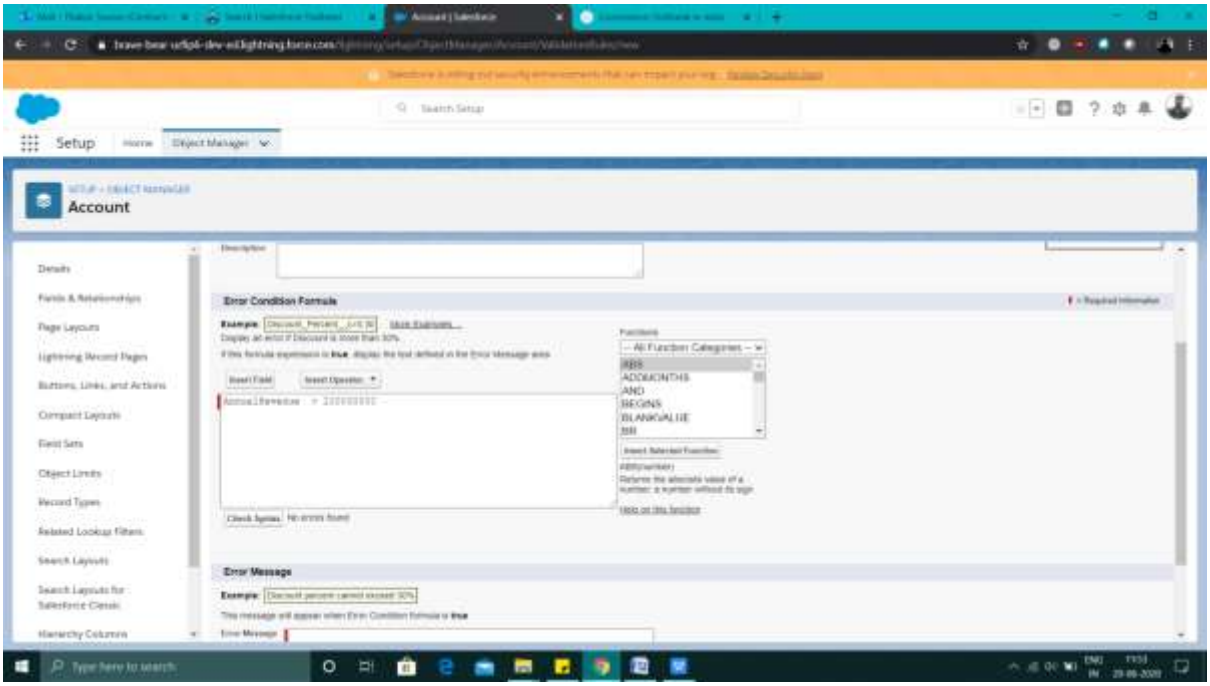

Fig 15: Creating a validation rule

Data Import:

It is very easy to import your data in to salesforce. The data that can be imported is .csv file meaning that data is separated by a delimitr.The salesforce provide two methods to import the data :

Data import wizard:

To use this tool go to setup and search in quick find box.By using this tool around 50000 records can be imported in one round.This tool import data for only standard objects like account, leads etc.

Data Loader:

This provides more flexibility then the dataimport wizard as we can import data of any datatype and can import up to 5000000 records ata time. This can be used form I as well as CLI.

Now the basic questions arise to everyone that which to use and when to use?Answer to this question is very simple:

When the recorda are less then 500000 use the dataimport wizard and when the data is between 50000 and five million the use the data loader.When we don’t need the automated data import then use data wizard imort and when automation is required then use data loader.

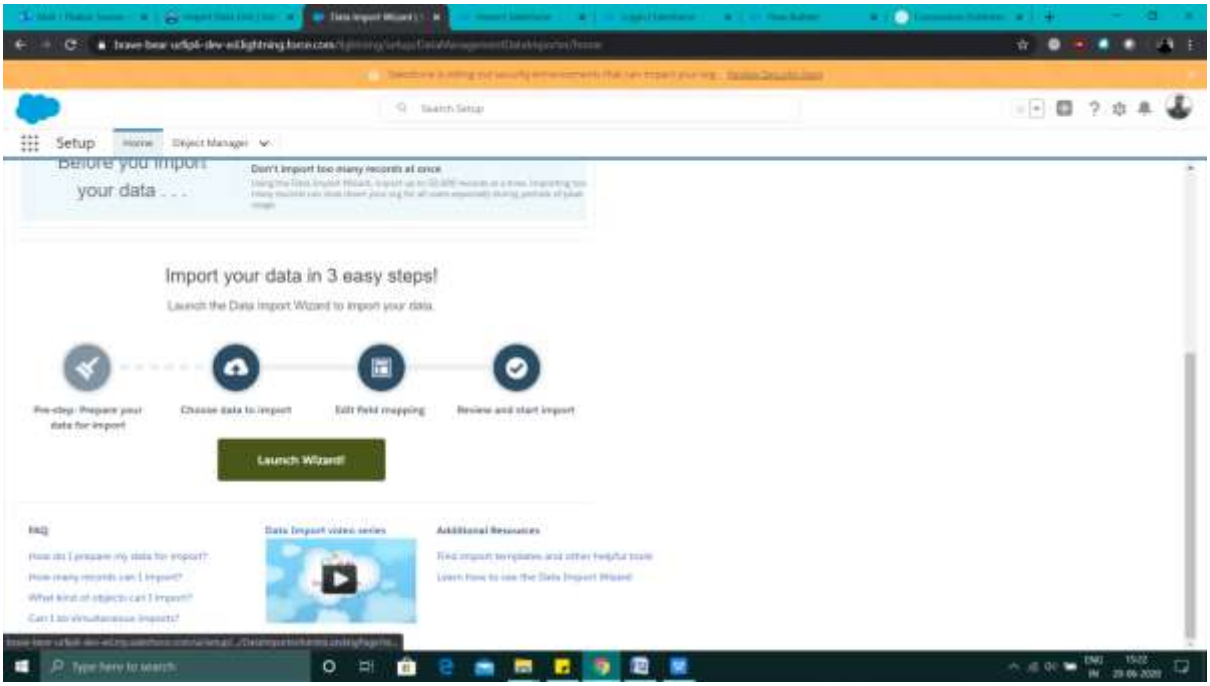

Fig 16: Launching the wizard

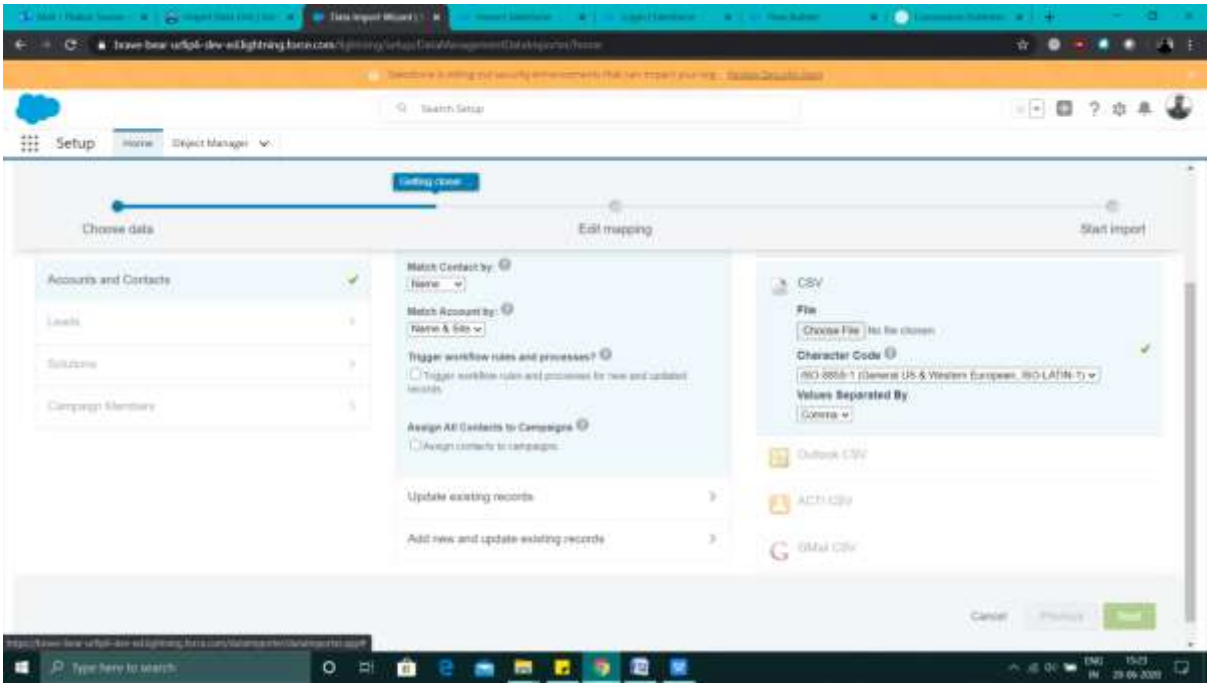

Fig 17: Mapping

Data export:

Just like the data import the data export is also very easy in salesforce. The tools provided by the salesforce are very effective:

Data export wizard:

This allows to export data from your sales force. But the trick here is that it allows to export data only once in 7 days or 29 days(monthly).The automation is provided for export.Also backup is generate dif user want to generate it but once in a month and it is only available in developer and professional edition.

Data Loader:

This is an external application and needed to be downloaded and installed manually. It can ne used from UI or by CLI.

How to use data export wizard?

First of all navigate to the setup menu and search data export in the quick find box. Click on the data export.

Now you will be asked that you want to export data right now or want to schedule the export , now you can select according to you needs.

After you done with all this you will be asked that what kind of data you want to export.

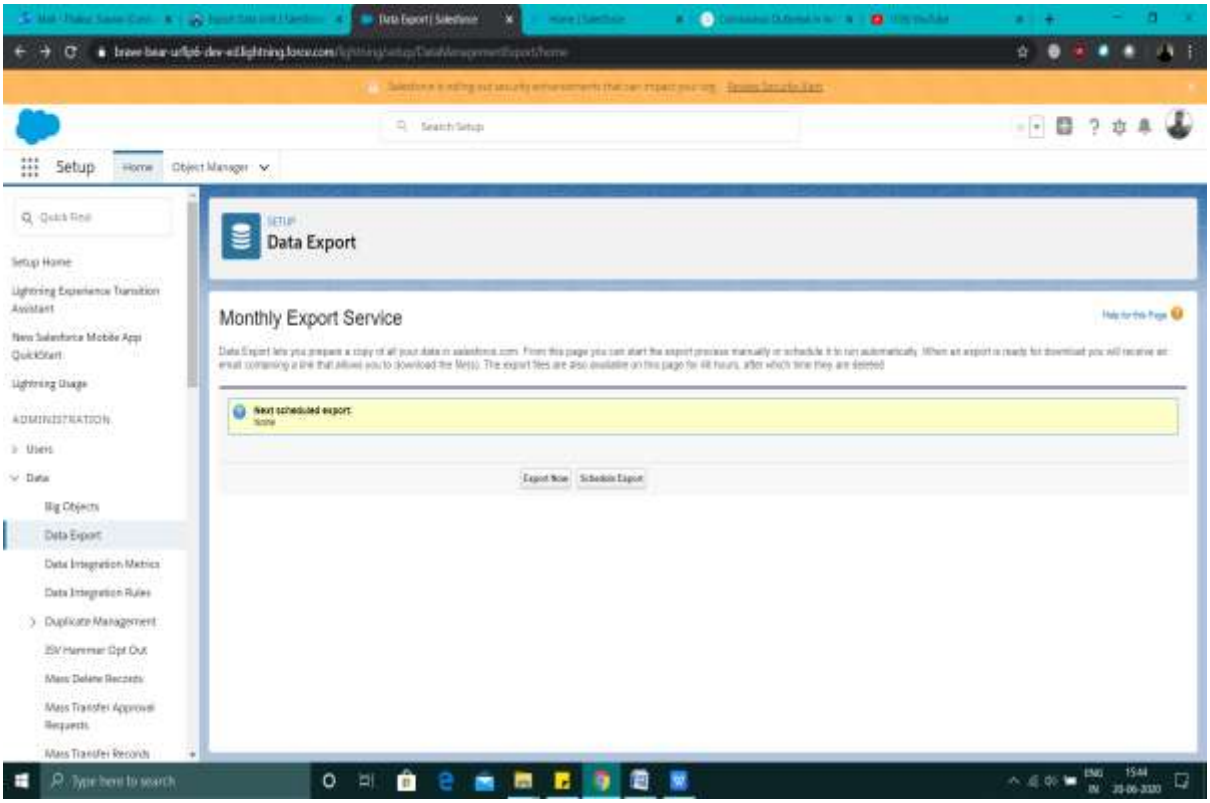

Fig 18: data export

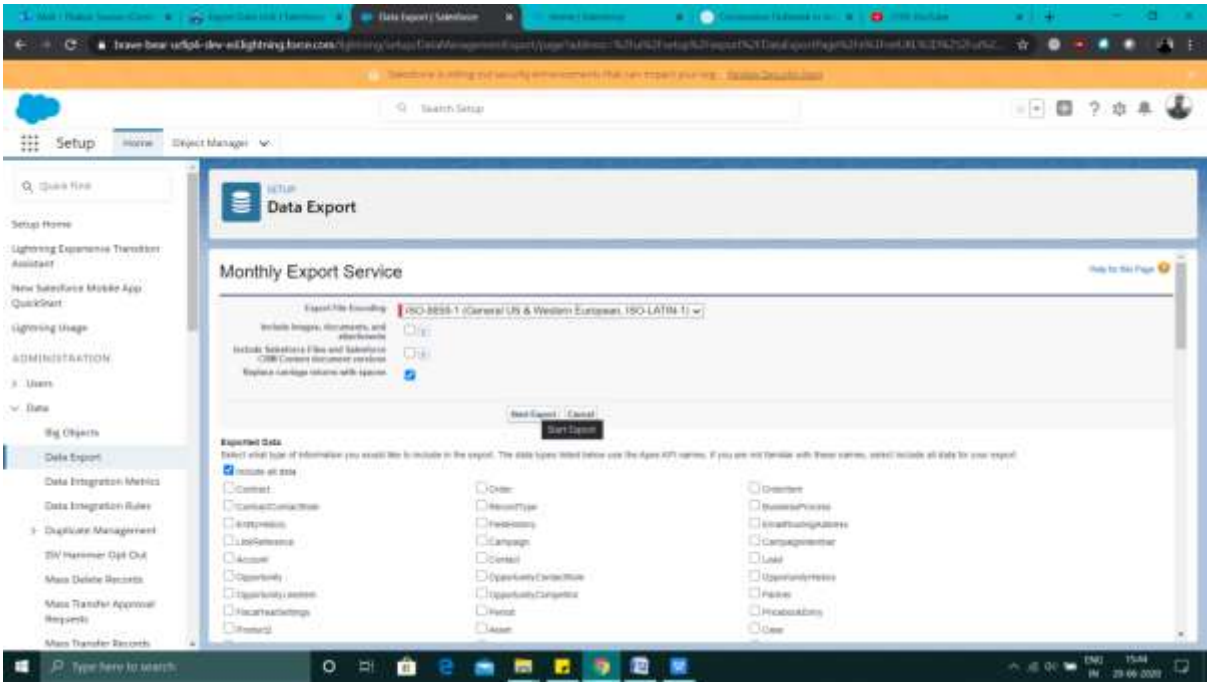

Fig 19: data export

Formulas and validations:

This topic can be very well understood by going through a real task so lets jump in to the work.

Let us create a validation on contract standard object:

- Navigate to setup menu.
- Open the object manager.
- Find the contract standard object.
- Click on the contract.
- In contract click on Field & Relationship.
- Select new to create a new.
- Select datatype as formula and click on next.
- Now type the name.
- And select the returntype of the formula in our case we selected number as our formula is going to return the number.
- Click next and now we are supposed to enter the formula.
- After formula is entered then we can check the sytax to check if there isn't any semantic error.

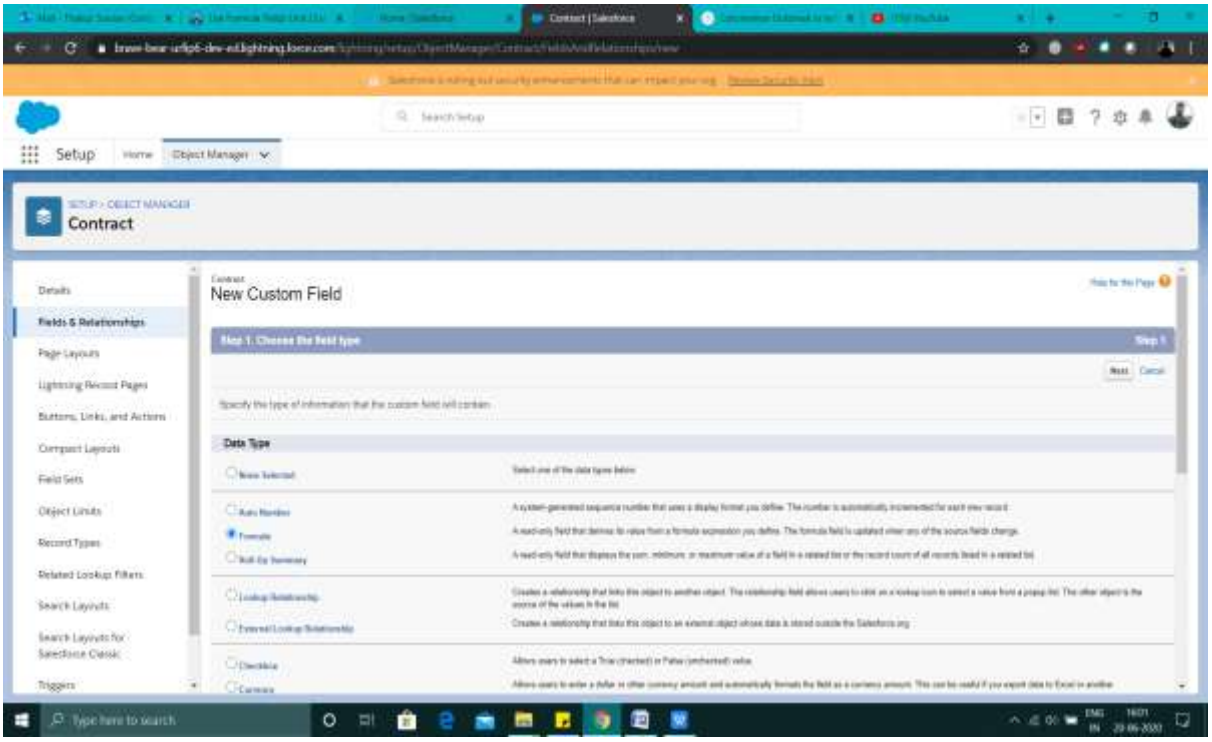

Fig 20: creating a formula

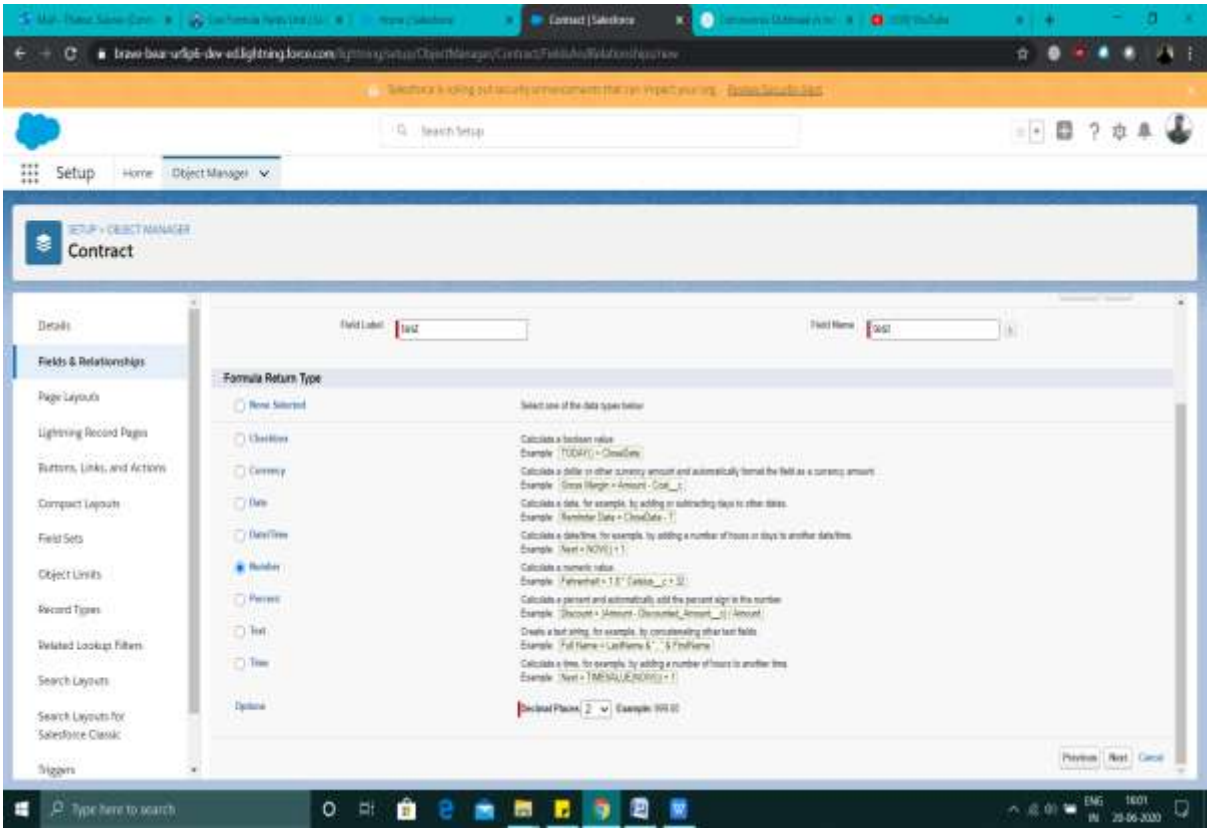

Fig 21: Selecting returntype of formula

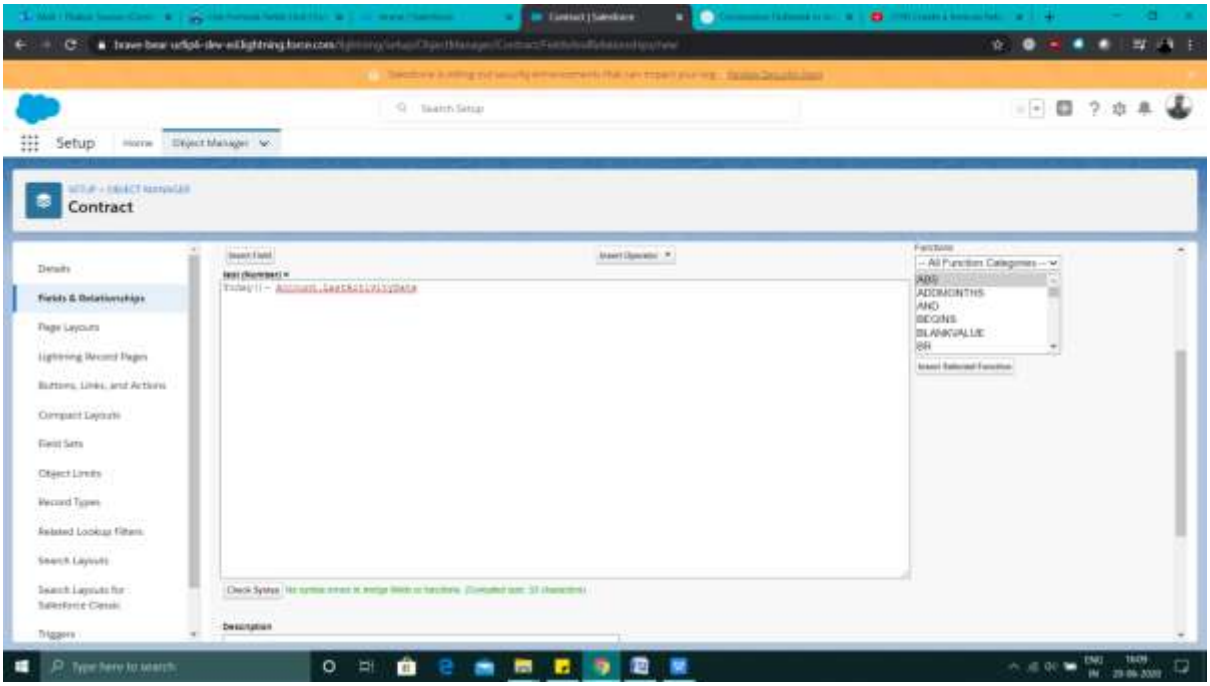

Fig 22: syntax writing and checking

- Now when you select the next button now comes the turn for permissions .
- You st the permissions and click next.
- Now click save.

Schema builder:

In schema builder all the standard objects and custom objects can being scene and their relationships can be scene. We can build custom objects and standard objects and also the relationships just by dragging the objects. We can add Master detail relationship and also lookup.

Lets see how schema builder helps to automate tasks-

- First of all we need to navigate to the setup menu.
- After that search for"schema builder" in the quick find box.
- Select it now you will be seeing a canvas.
- First of all clear it by clicking on clear all.
- Now from tab you can drag the object you want.
- If want to include fields then switch to elements tab.

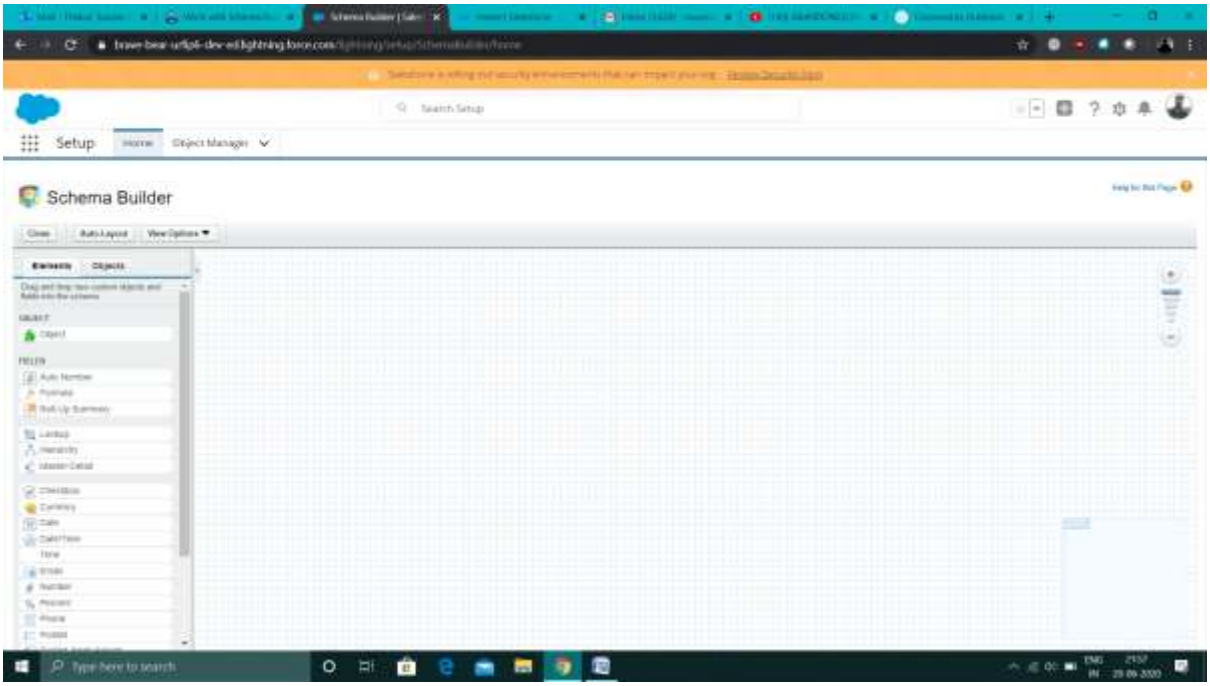

Fig 23: schema builder canvas

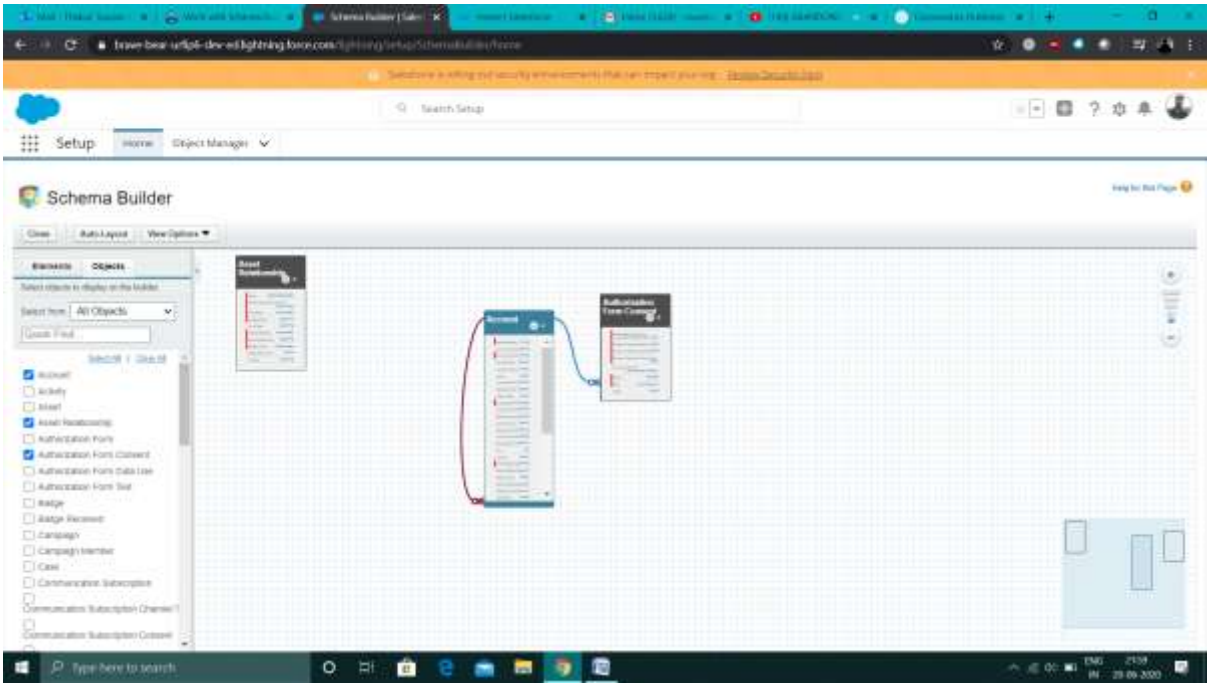

Fig 24: Objects and relationships

Creating a report:

- First navigate to the sales app.
- Now click the reports tab.
- Click on the new report.

- Select the object you want to create a report for.

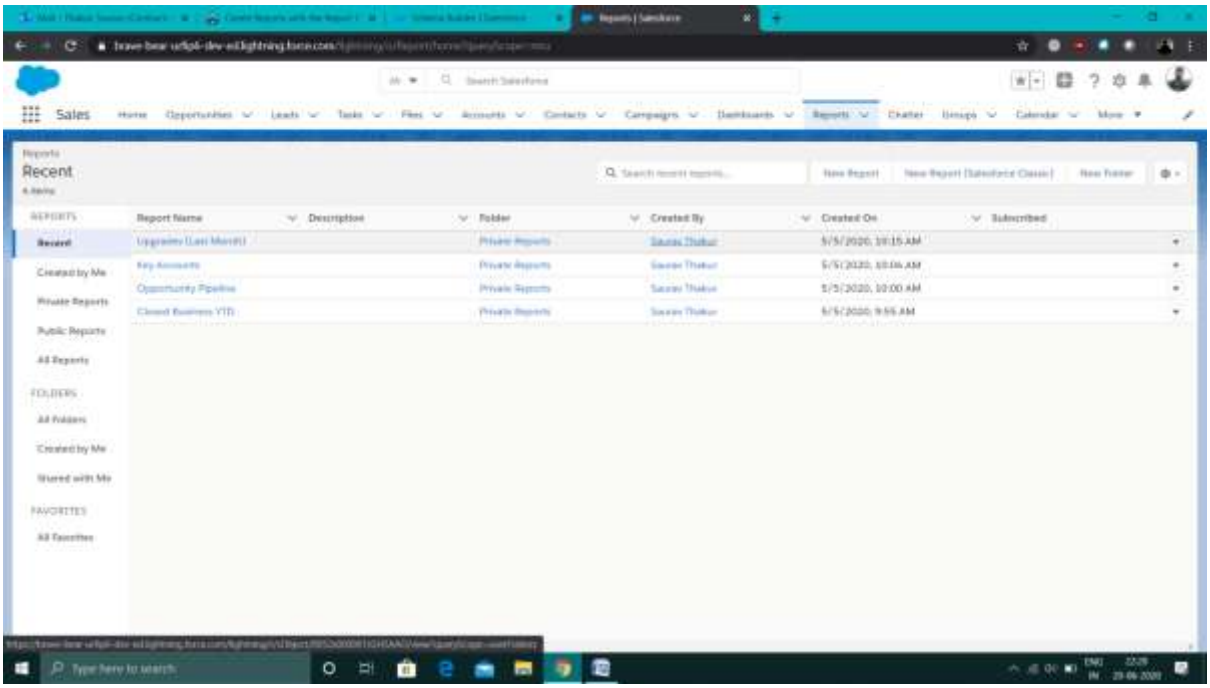

Fig 25: Report tab

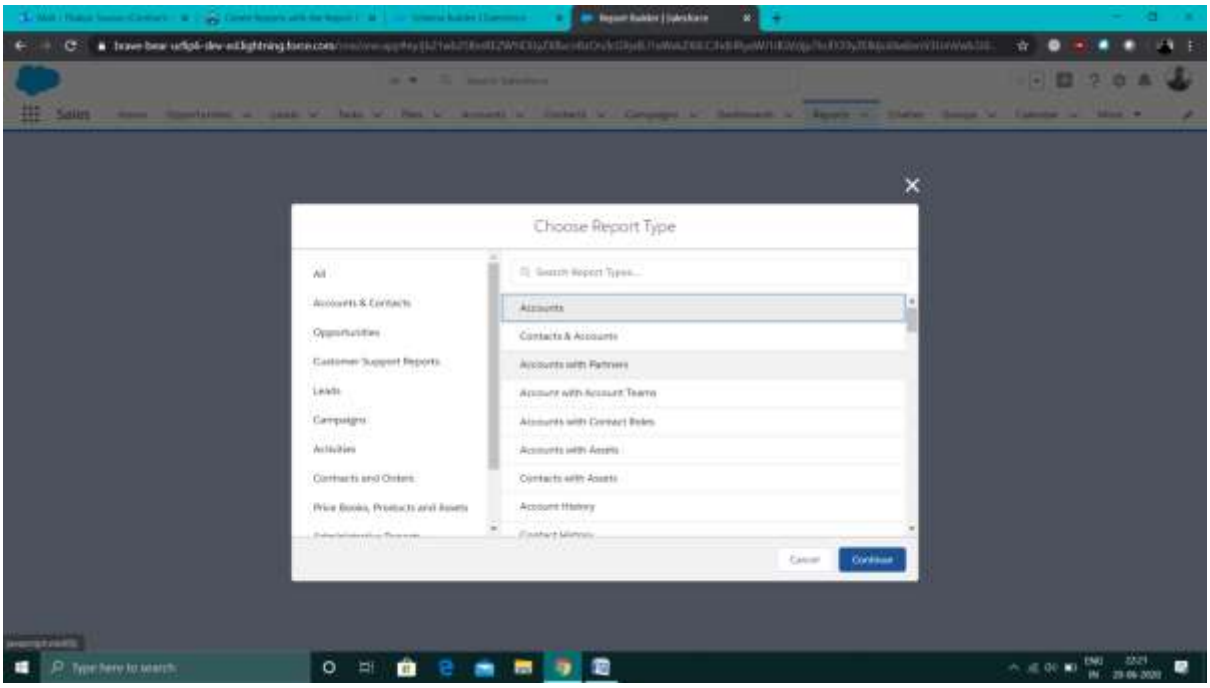

Fig 26: creating report

Creating a role hierarchy:

Follow the following steps to create a role:

- Navigate to setup menu in sales app.
- Search for roles in quick find box.
- Now below the name of the company select the add role.
- Now you will be asked to name the label, whom this role reports to etc.

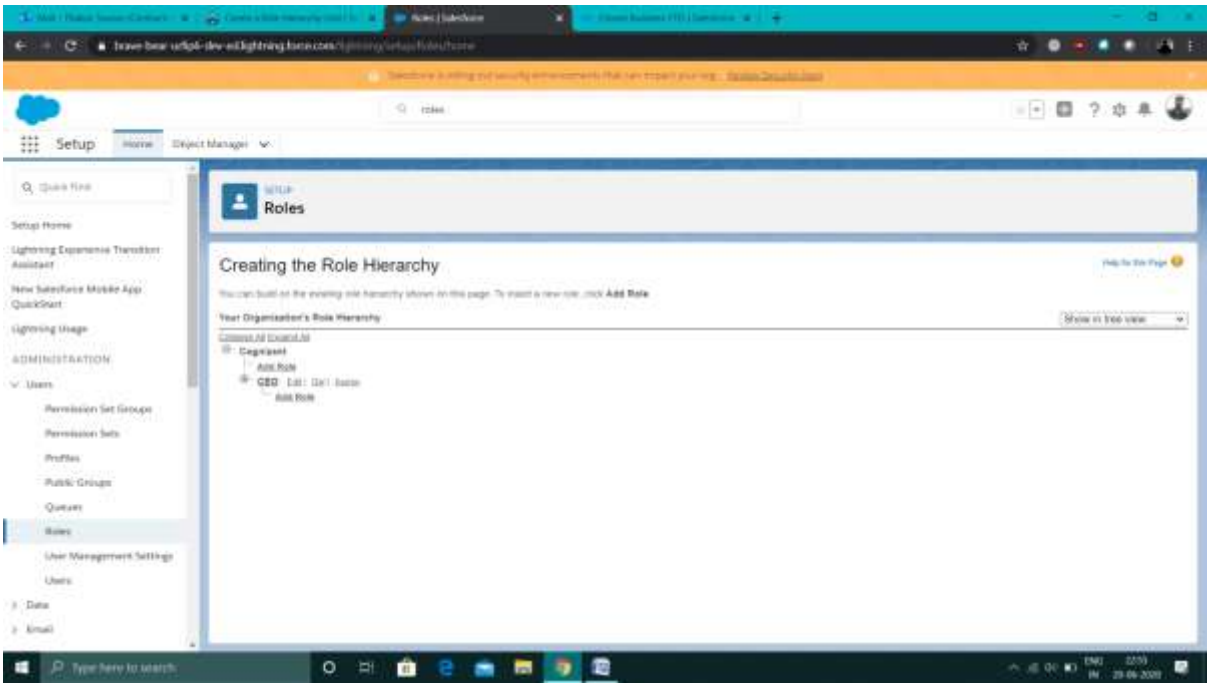

Fig 27: creating role

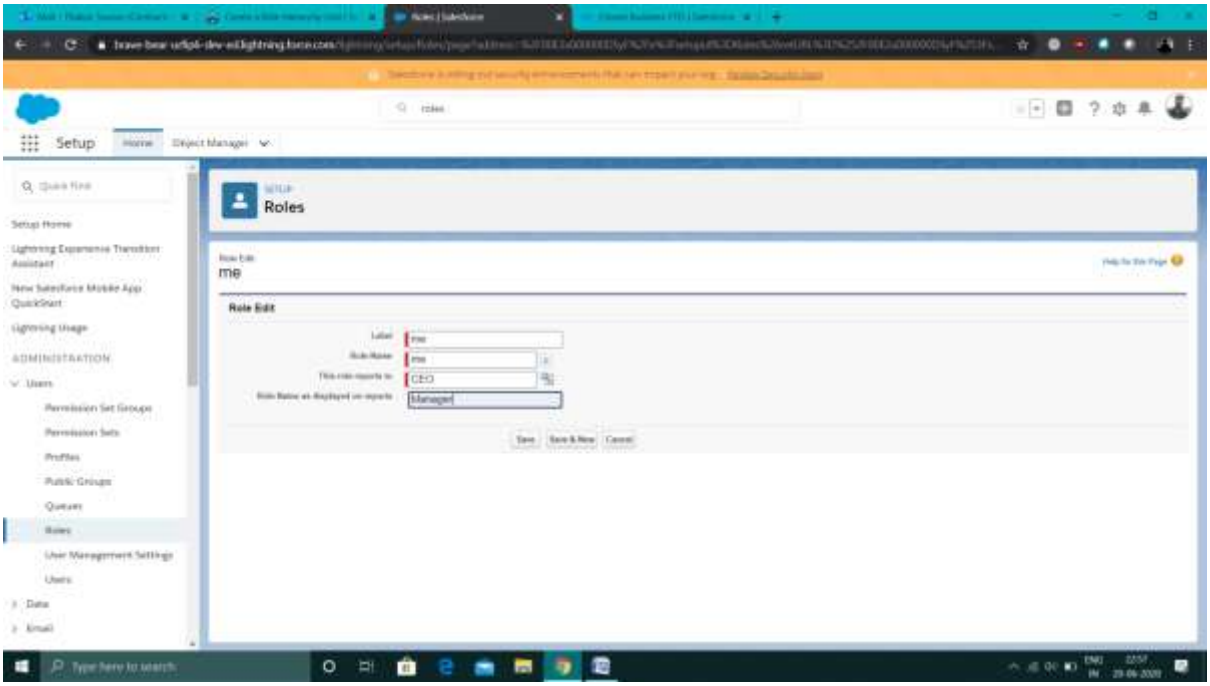

Fig 28: naming role

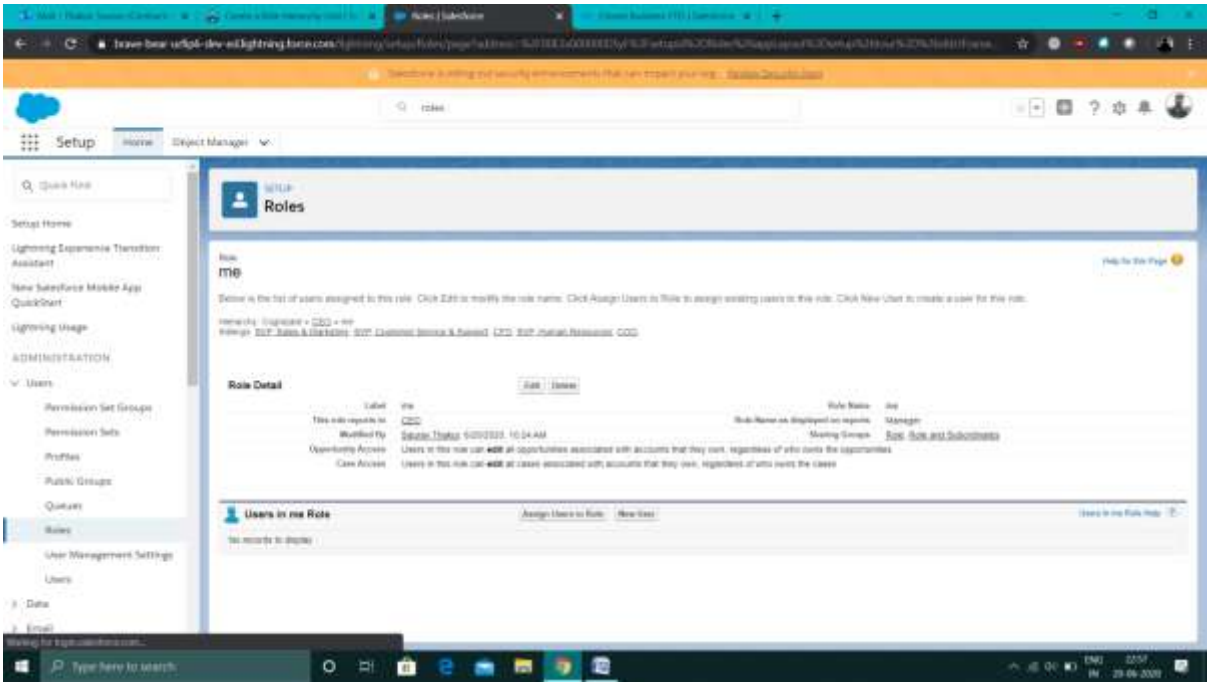

Fig 29: Role created

CHAPTER 3

PROJECT:RECRUITING APP

3.1 Introduction:

To build this app we need to follow multiple steps one after one so that every thing remains on the track.And the project do what it is supposed to do. So lets begin with first step in journey.[5]

3.2 Data modelling:

It simply means different objects and the relation between them.So to model the data lets first create a custom object for review:

- First of all we need to install a package called recruiting app package.
- For this open the app playground starter and from there switch to install a package tab.
- There enter the code for the package which is(04t0P000000N9rs).
- Now install it for the admins only.
- After this is installed you will receive a mail that your pacake is installed.

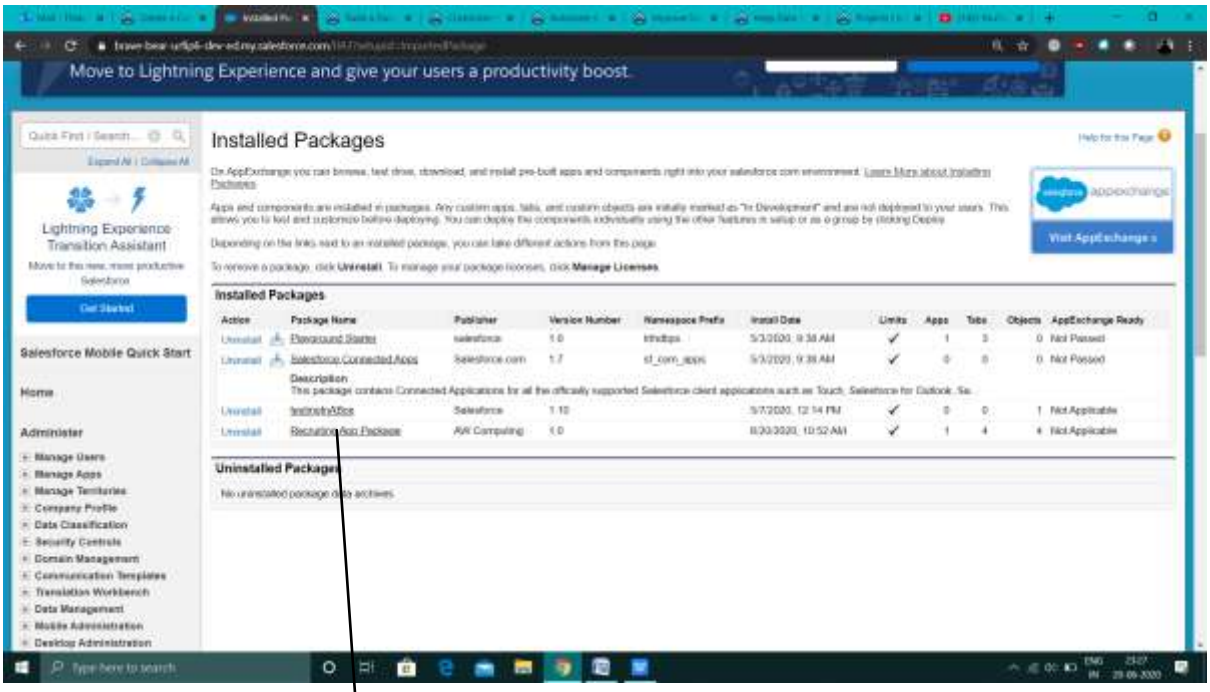

Fig 30 : Intalled package

Now our next step is to create a custom object with some specific properties as shown below.

- Navigate to setup menu in the sales app.
- Select the object manager and click on create new custom object.
- Set label as Review,record name as Review Number,datatype as auto –number display format as REV-{0000} and starting number as1.
- Allow reports,track field history.[5]
- Select deployed,allow search and add notes and attachment.

Now we are again going to create a custom object for tracking wich sites are being hosted.

- Again navigate to setup menu and then select the object manager tab.
- Now click at create new custom object.
- Now set label to Job Posting Site, record name to site name and datatype should be text.
- Select allow reports, track field history,deployed,allow sesrch,add notes attachment ans launch new custom.
- Select tab style as real state need to deselect include tab and select append.

Now we are creating custom fiels for this object.

1. Data type as url and set label to job posting url.
2. Datatype as picklist and label as status, values active and inactive
3. Datatype checkbox label as technical site.
4. Datatype as testarea, label as description.

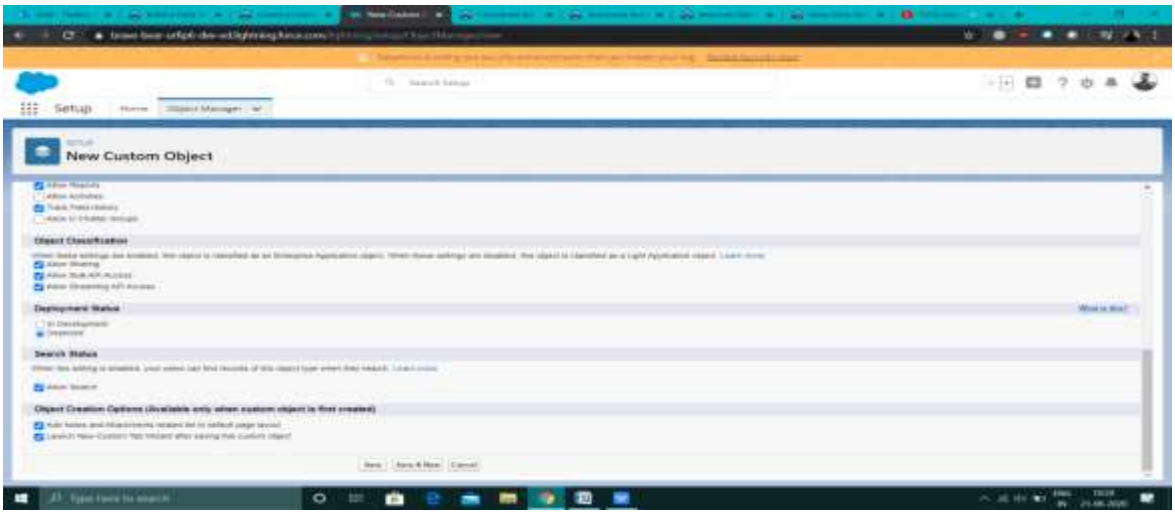

Fig 31: custom object

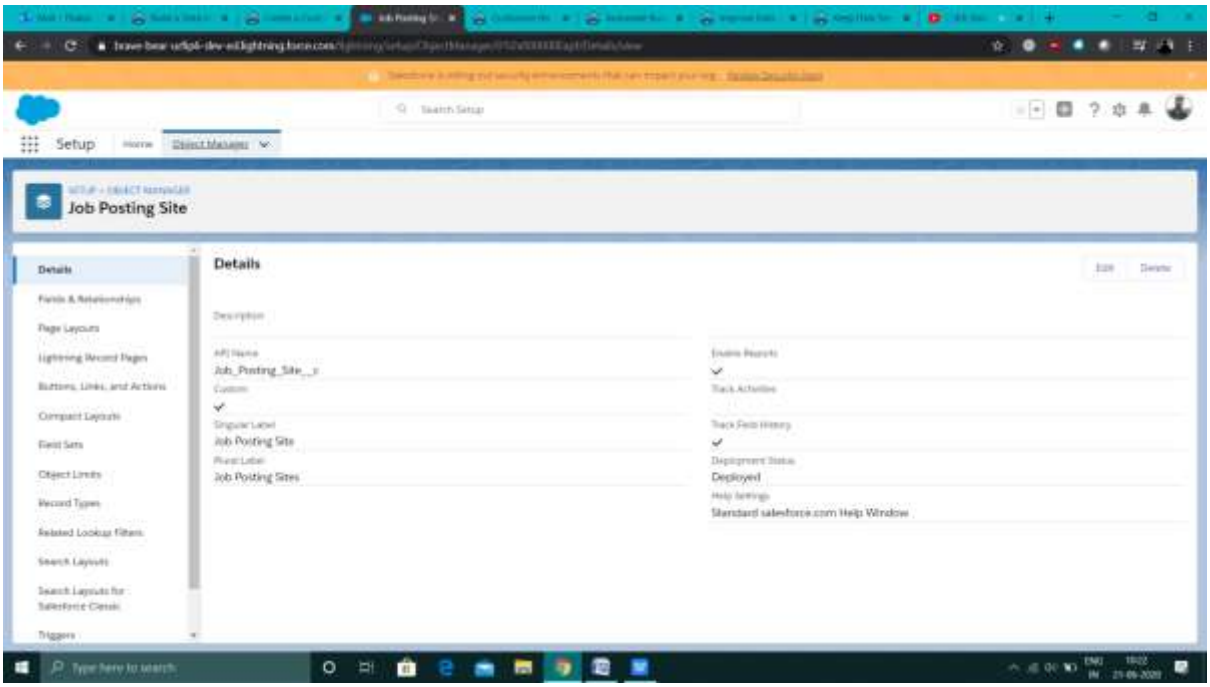

Fig 32: Object created

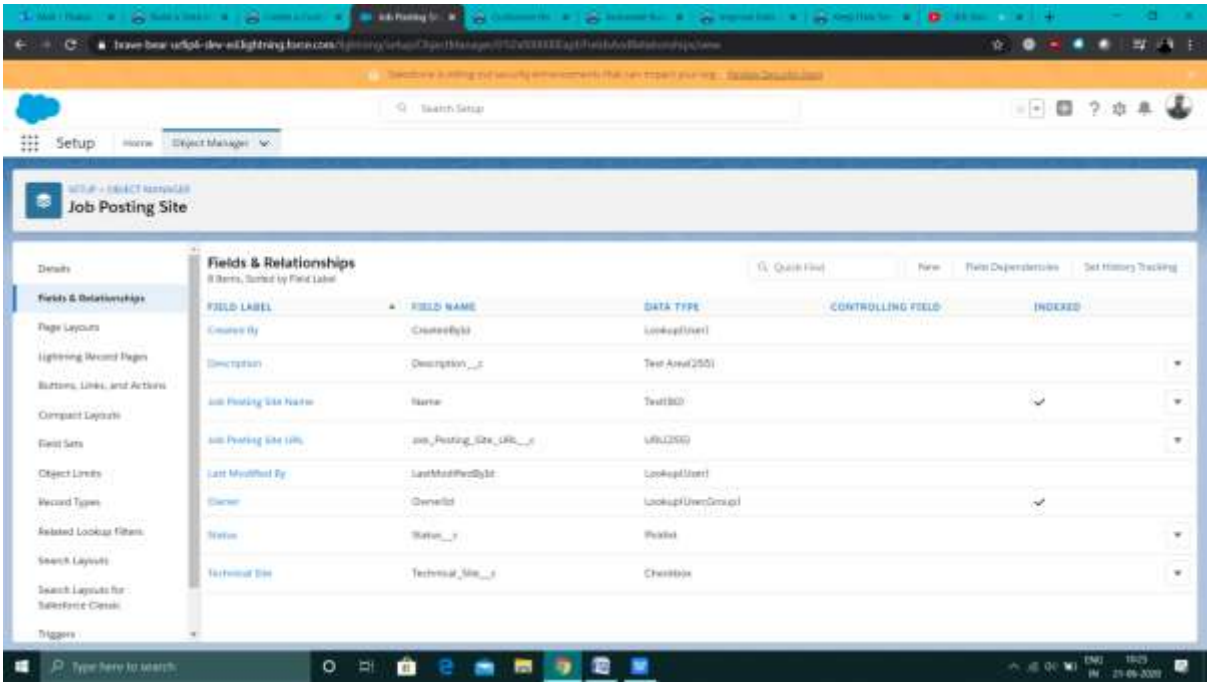

Fig 33: Object and fields created.

Now we will create a object for job posting

- Again navigate to setup menu then to object manager .

- Create new object and set label as job posting, record name as job posting number datatype as auto number display format jobpost-{0000}.

Now we will create MD between job posting and position.

- Select md as datatype and related to position and label as position and save.

Now again new MD between job posting and job posting site.

- Select Md as datatype and related to job posting site and label as job posting site.

Now we have to change the layout:

- Navigate to setup then to object manager then find and cluck position then page layouts.
- In job postings add JBS:status and JBS:technical site then save.

Adding fields to job posting site page layout:[5]

- Add position:status and position:title and remove JB:JBN

Now in recruiting app we will add new positions in position tab.

- Sete title as super sales rep and department as sales, approved, and location as Us and save it.

Now we will add Job posting site tab to our app.

- Open the job posting site tab and click at new.
- Set name to lot-o-jobs and url to the url and status to active.

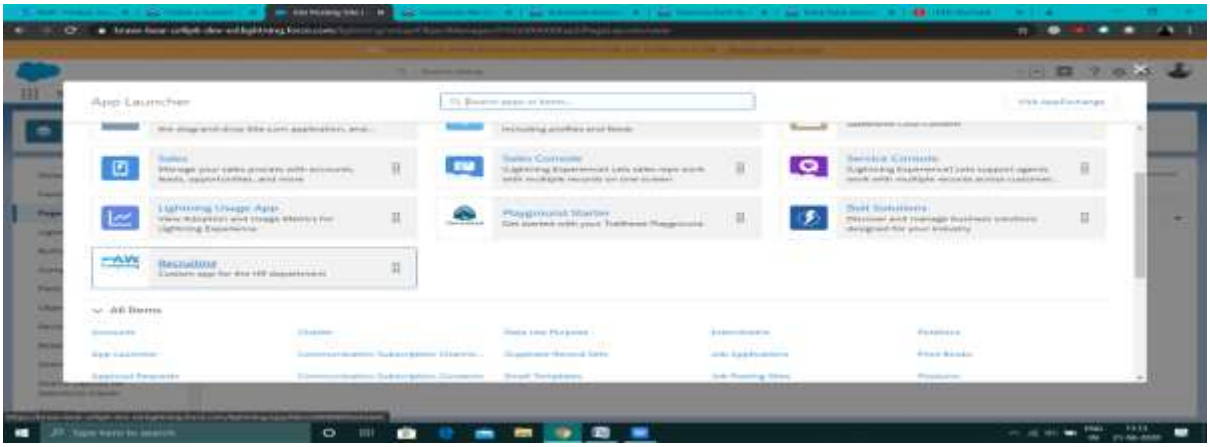

Fig 34: recruiting app

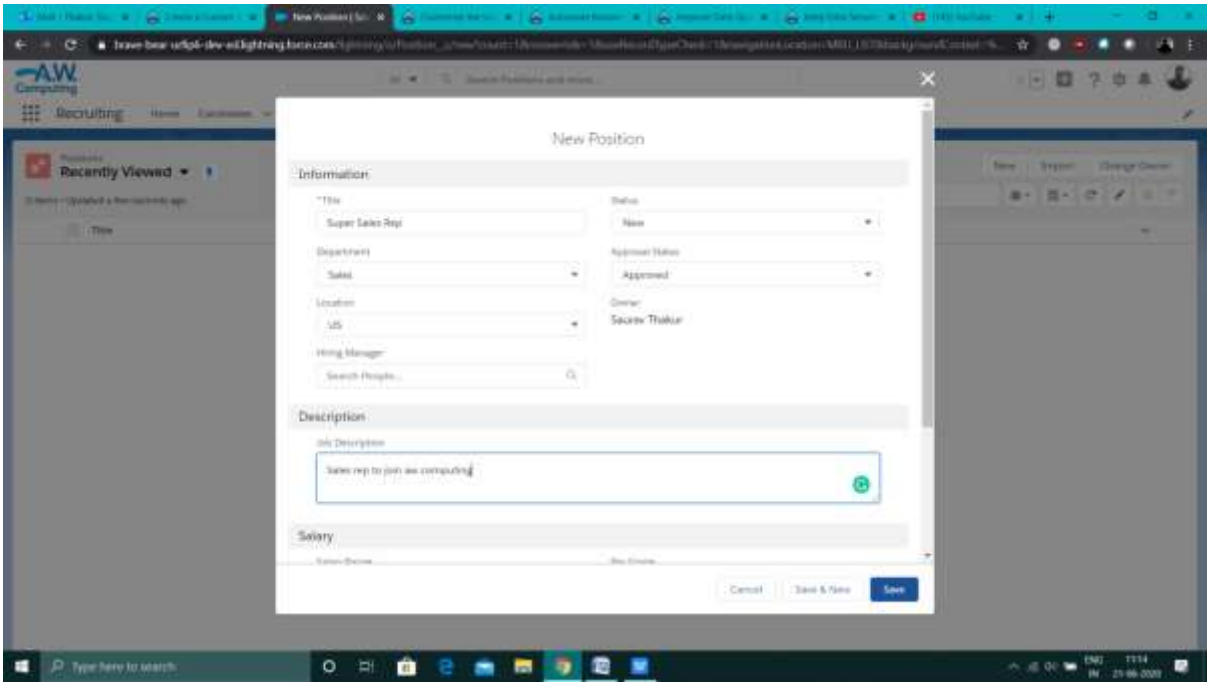

Fig 35: Adding position

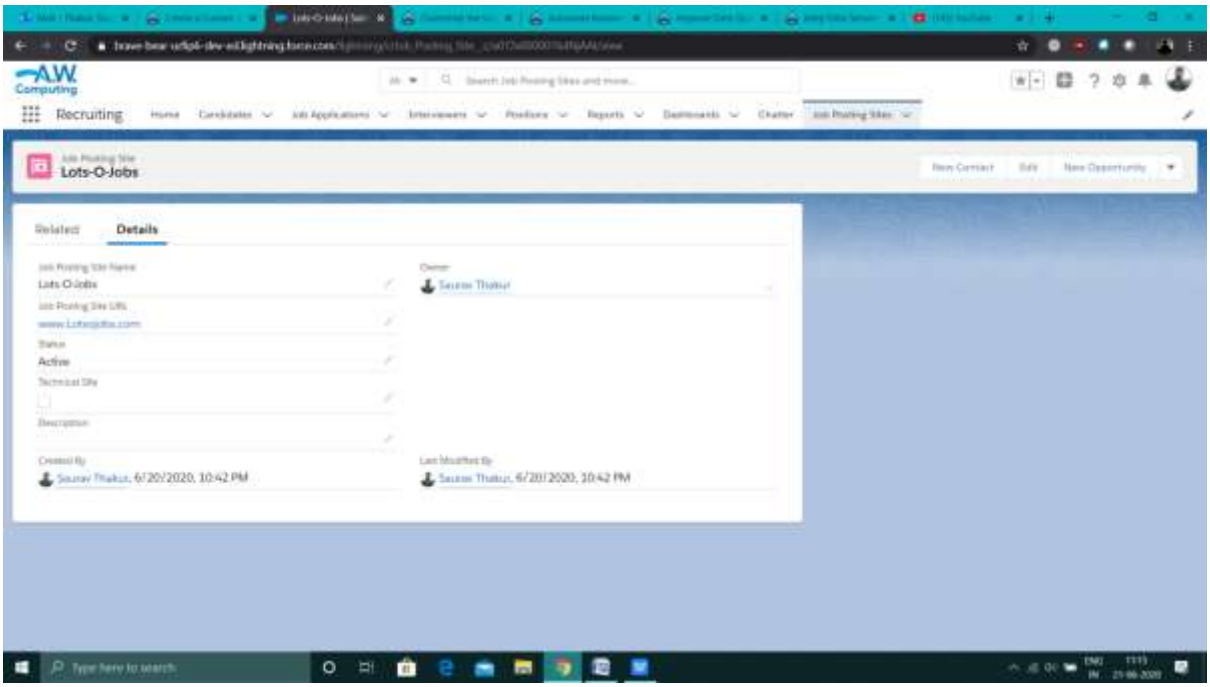

Fig 36: New job posing site

Now as we have come so far now we will create a look up relationshipwith the position object.

- Navigate to setup then to object manger tab.
- From there click on position and create a new filed&relationship select lookup as datatype .
- Related to position and set label to Related position, change related list to related pos and save.
- Now we will add the look up filters –related position-department=filed position-department.
- Second filter as position-recordid !=field realted position-record id.
- Then save and navigate to recruiting app top add new posion as we added her.
- We will add the super sales rep.

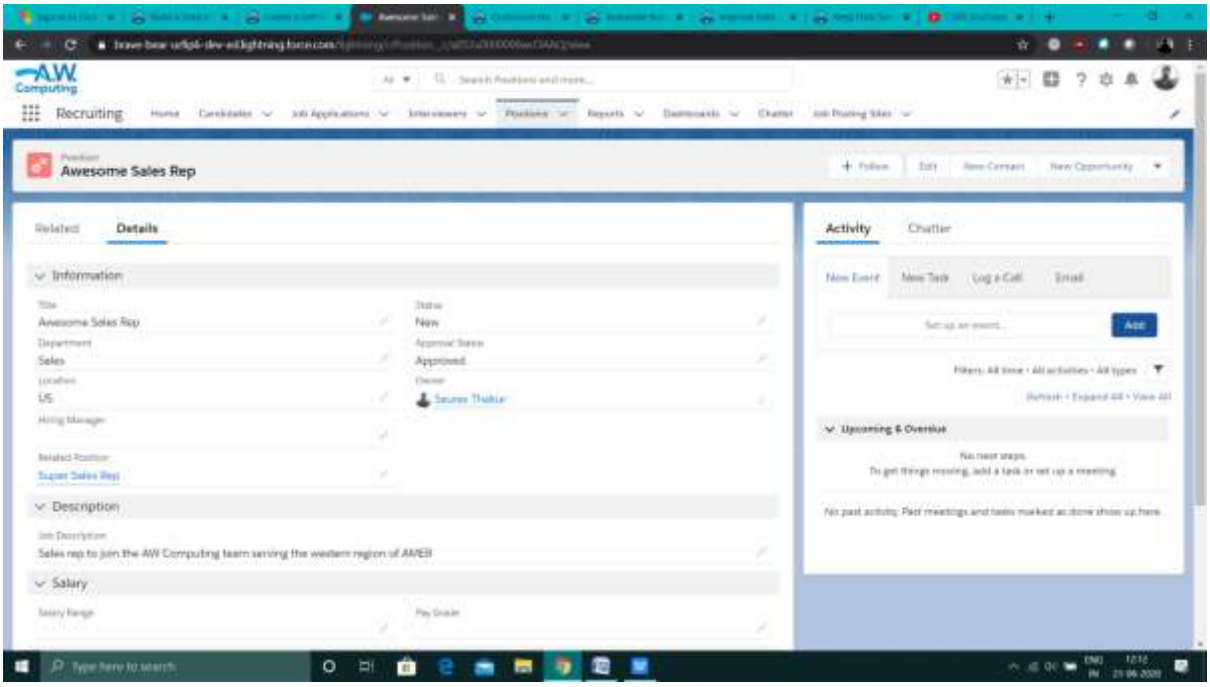

Fig 37: Added the position we have crteated.

Now we have came to the last part of the dat modelling for creating customs fields for recritingand here it goes:

- Navigate to setup menu and go to object manager and then find the rewiew .
- Create a new fields-three picklist named core compitancy, Leader ship skills and experience.
- Four text areas named,core competencies comments,leadership sjilss comments,exp comments reason recommended.

- A check box names recommend to hire.
- A MD relation ship named job application related to job application.
- A lookup named interviewer related to interviewer.

3.3 User Interface Customization:

How your app looks plays an important part. Because more convient the things are more efficient your app will be.

Lets create a tab for review object:

- Navigate to setup then search for tabs in quick find box.
- In tabs create new tab, for object pick list select review .
- Now from setup menu search for app manager from there add the tabs required .

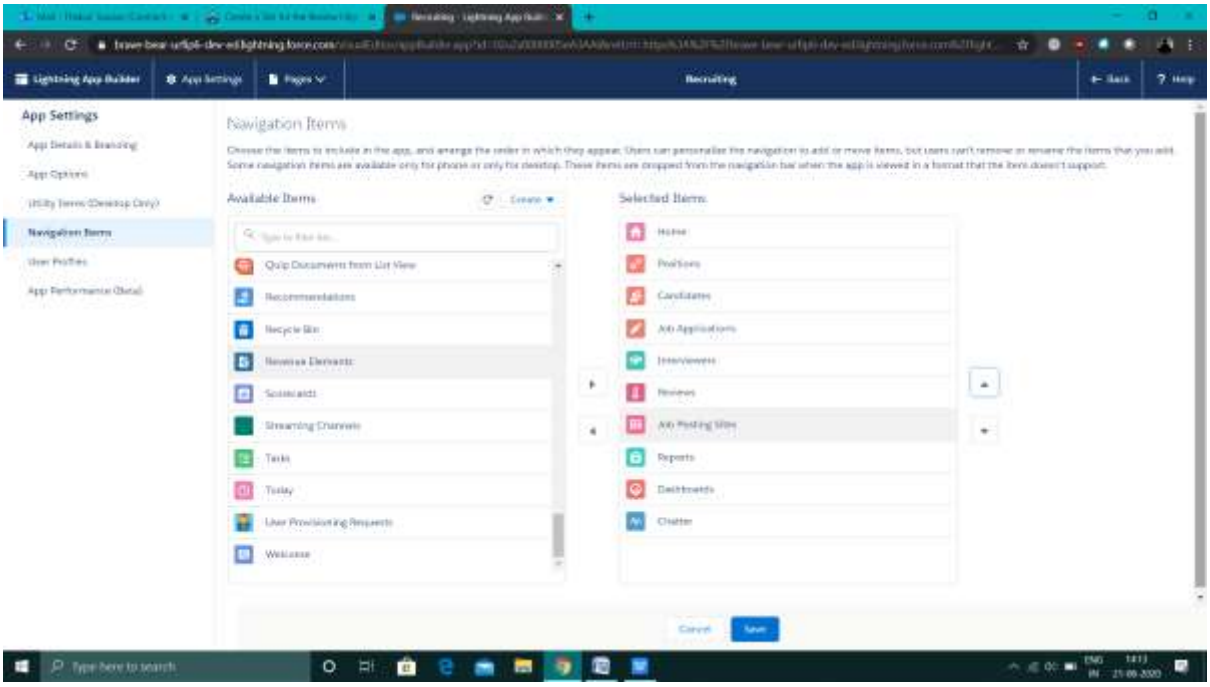

Fig 38: Tabs

Creating quick actions :

- Click at candidate in object manager then click on button links actions and create a new action, action type for create a record targeting job app.
- Drag the sattus to pallete.

- Now go to page layouts and edit candidate layout then click override the predefined actions.
- New job app shold be placed after file.

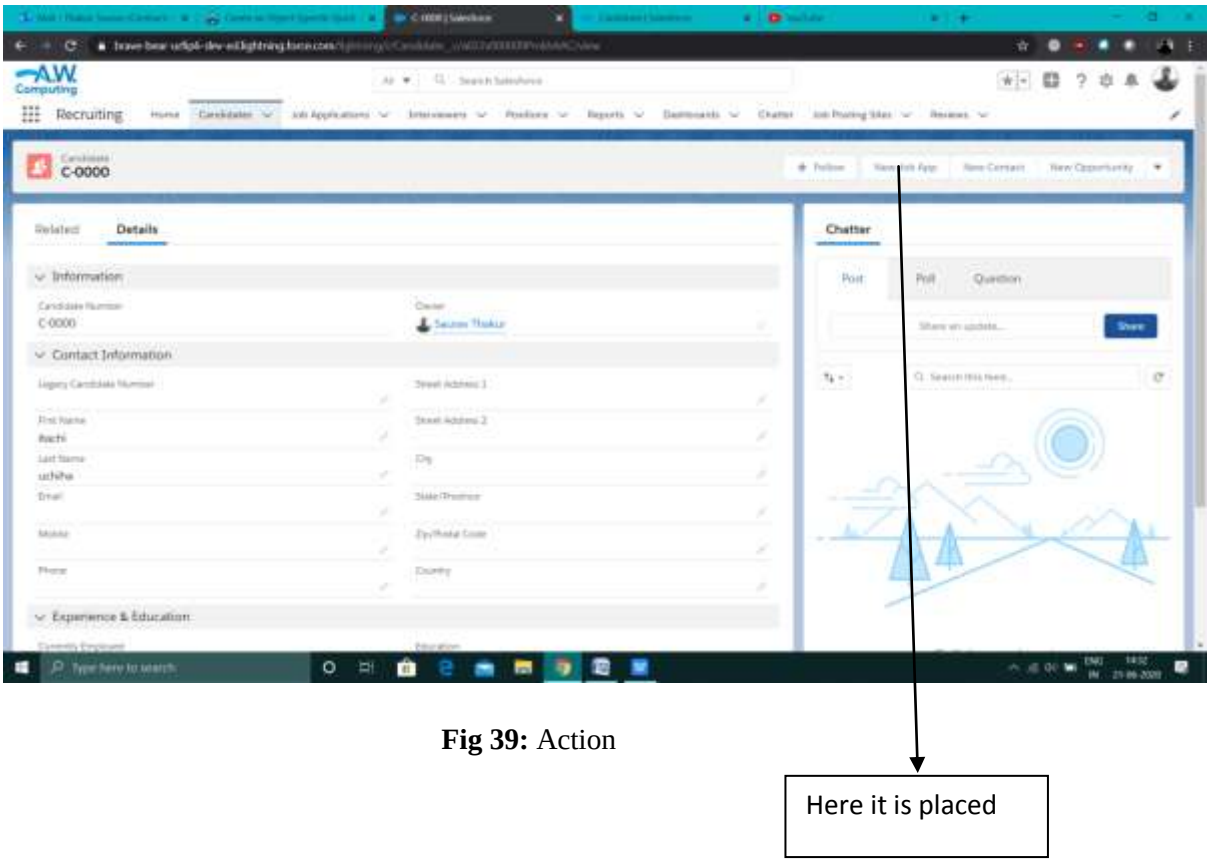

Fig 39: Action

Now its time for customizing page layout:

- Navigate to setup menu then to object manager an open review object and go to page layouts.
- Now create 4 sections named core competencies ,leadership skills, experience ans recommendation.
- All of them have 1 column and first 3 field properties set to required.

Lightning component add charm to your app so we will add the lightning component to the app.

- Create a new entry in candidate tab in app.
- Then on screw icon go to edit page to open app manager and drag recent item to top.
- And save that and activate for phone and desktop.

- Now to create custom layout named include candidate name and select fname lname and candidate number and set it default.

Now we will create record for po obj:

- Create a profile by cloning standard user named recruiter :technical and save that.
- Now clone above profile and name that recruiter:nontechnical and save.
- Now go to record types in position obj and create new named technical position .
- Now new record type nontechnical position.
- Now in page layout drag record tyope to info section.[5]

Lets now customize the page layout:

- Navigate to position object and create a new field named operating system.
- Create one more field named programming languages.
- Now go to page layout and create new layout named technical position layout and save.
- Drag section and name it technical skills, now drag programming languages and os to this section.
- Edit the page layout assignment and save it.

Now the last step in customizing User interface is enabling chatter , As chatter keeps you updated what's happening around.

- Navigate to setup and search for feed tracking on quick find box.
- Then enable field tracking for review object.

3.4 Improving Quality of Data:

Now we need to validate the data that will be entered to our app:

- Navigate to object manager and select review object.
- Now select field &relationship and add new field naming candidate name having datatype formula and return type text.
- Now write the validation formula.
- Again create a formula field having return type text named position title.
- Now we will modify page layout and add position title and candidate name to it.

Now we will write two validation rules and will add tab to the app:

- Navigate to position object and create a new rule ..
- Now create a custom object, afte object is created add fields to I like city and state as we are adding for zip code.[5]
- Now lets create tab and add it to the app by the pencil icon having option to add the items to the tabs list.

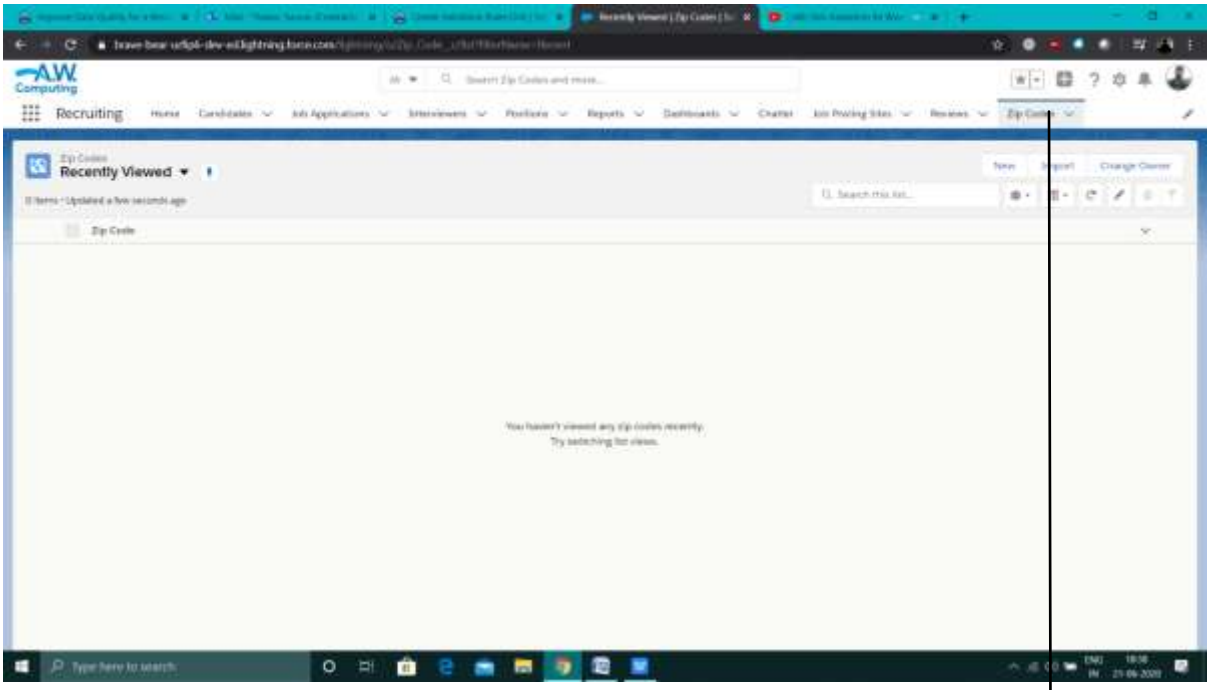

Fig 40 : Tab added

Creating formalas and rollup summaries:

- Navigate to setup menu and select the review object,
- Now add a field (formula) to it and save it.
- Now we will create a rollup summary by slecting the datattpe as roll up and roll up type as count.
- One more rollup summary with type sum.
- Add formula field to it with return type number, create one more formula with return type number
- Now move to page layout and create a secton and drag it below info section.

3.5 How to keep data secure in the app:

Custom profiles:

- Navigate to setup menu .
- Then search for profiles and clone the standard profile and name it anything. After that change permissions in the desired way.

Now lets set field level security and permission sets;

- Navigate to setup and find Permission sets, and create one with user licence Salesforce.
- In assigned apps add recruiting app.
- In object settings edit settings of job application, job posting sites,positions.
- Now edit sharing settings.[5]

3.6 Automating Application processes:

Lets setup the process using process builder-

- From setup search process builder and create a process add object and criteria then the conditions.
- Aloso add the immediate actions and set field values.
- Now to test the process lets first create a user ,after the user is created the open the app and create a new position with hiring manager same as user, now we can see the user in the interviewer section.

Now lets automate email by using classic email templates:

- From setup go to classic email templates and create two templates for acceptace and rejection of request.
- Now create fields in position objects which will have lookup relation with the user, create 3 of these.
- We will create a approval process for position.
- For creating approval steps in initial submission section add the steps for different processes.
- And also create final accept responses and final rejection steps.
- Here in our app email is sent in both the cases of acceptance or rejection.

Now using the process builder we will create aprocess step wise step-

- Again navigate to setup and search for process builder in quick find box.
- Click new and give it a name then specify that the process will trigger when a record will get changed.
- Now add the position as object and also add the criterias.
- After the condition add the immediate action and save it.
- At last activate it.

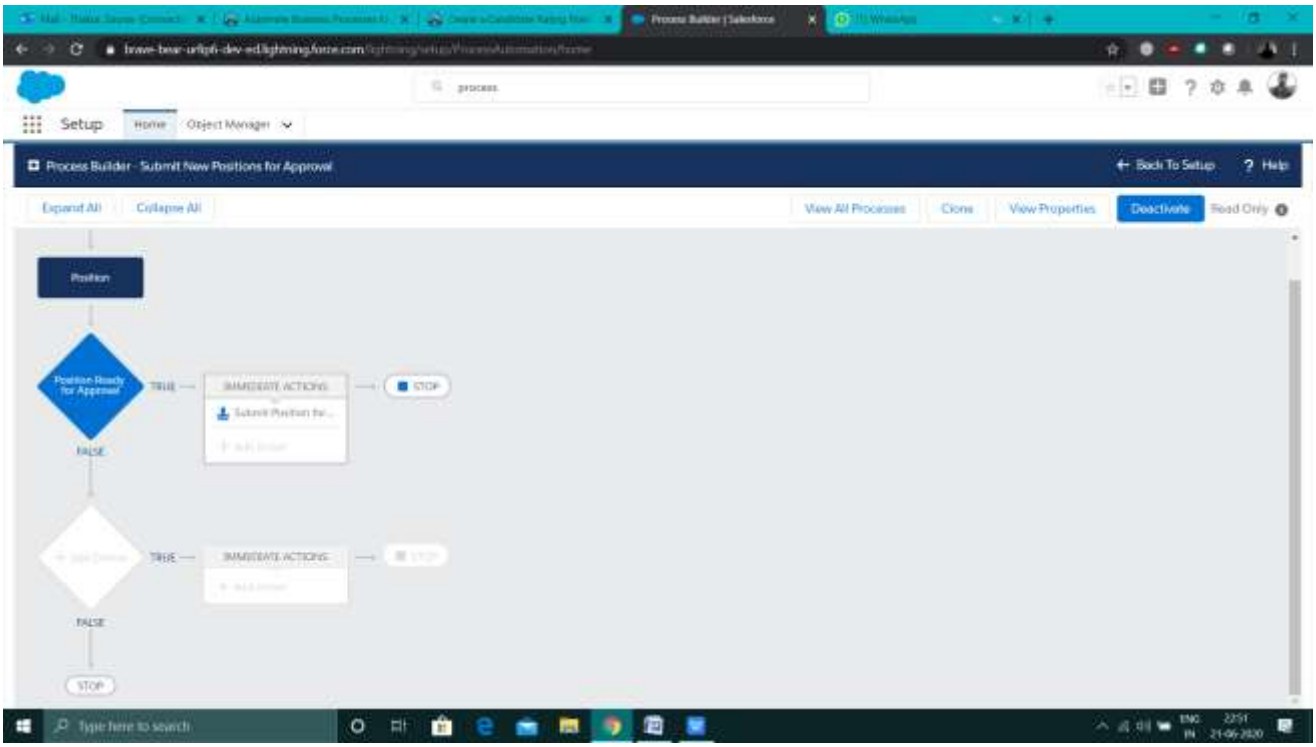

Fig 41 : process builder canvas

Now lets create a flow . Flow lets user to create things way easier then any other methods , so lets jump in-

- Navigate to setup then search for flow in quick find box.
- Add a screen component to it then add radio butoon having some vale.
- Then add two radio buttons to the screen.
- Now add the check box , and a textbox.
- Now add create records to the screenand add 9 components to it and set its respective values.

- Now add the screen elements and add a screen .
- Aldo add the fault messages between the components.
- Save it and activate it.
- Now its time to deploy the flow.
- In the job application object select new button or link and add the syntax and then save it.[5]

CHAPTER 4

Conclusion

Throughout the project we were able to built a data model for it so that the large data could be deal efficiently. Also after the data modelling we customized the user interface for our app, we created tabs, actions, modified the page layouts, customized position page layout and they enabled the chatter for the review object.After the User interface customization is done next we improved the data quality.We did this by creating the validation rules, formula fields and roll-up summaries.This ensured that correct data should be entered in app of recruiting.

As we have ensured the data quality me moved next to keeping the data in app secured . As we know that data security is one of the most important thing in application.This was done by creating the custom profiles and restricting the access of data by using field level security, sharing rules and permission sets.And at last automation was achived by using approval processes and flows.

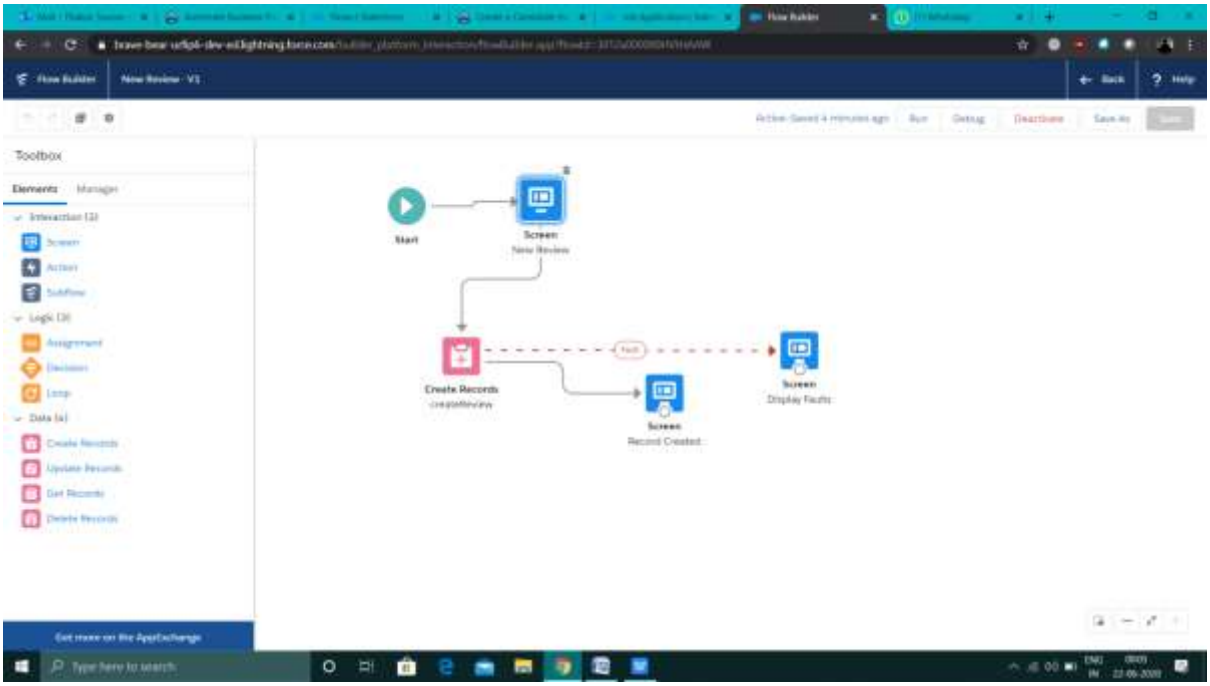

Fig 41 : Flow we created

CHAPTER 5

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4. https://www.salesforce.com/in/products/
5. https://trailhead.salesforce.com/en/content/learn/trails/build-platform-apps-in-lightning-experience

Saalesforce application for recruiting

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