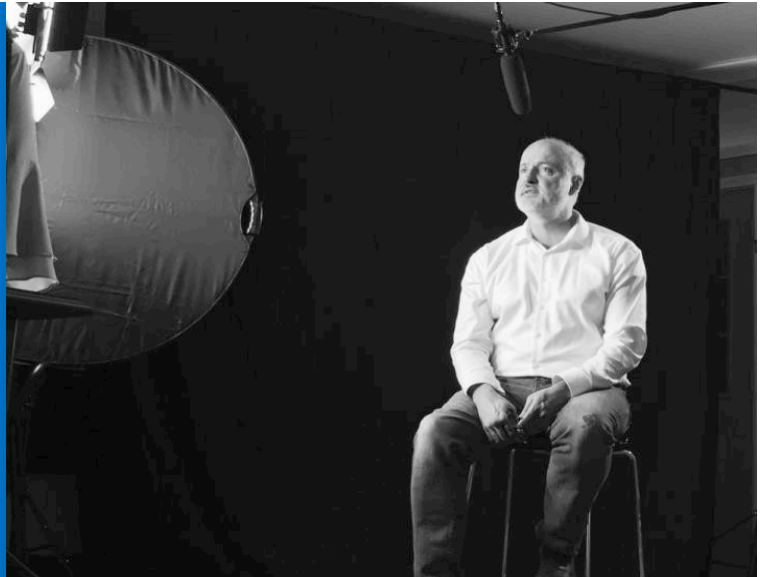


Launch Your Salesforce Career Bootcamp



Module 4: Jobs & Recruiters App Pack

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Lesson 1 – Jobs and Recruiters App Pack Introduction

In this introductory lecture, I discuss what lies ahead for this module – the Jobs and Recruiters App Pack.

In this module, we will build a more complex app. This app is used to track job opportunities, manage recruiter and hiring manager relationships, as well as the uploading, versioning and public sharing of your resumes, all on the Salesforce platform

Notes:

Lesson 2 – Creating a Jobs and Recruiters App

In this lesson, we begin the process of creating a Jobs and Recruiters application. I then demonstrate one way to handle uploading a resume to Salesforce and associating it with a job opportunity.

Notes:

Lesson 3 – Using the Service Setup Menu

In this short lesson, I introduce you to the Service Setup menu.

Notes:

Lesson 4 – Creating a Resume Custom Object

In this lesson, we improve upon the Resume process, to opt for managing resume versions inside of a custom object. We create a Resume custom object by leveraging the Schema Builder.

We also create custom fields for the Resume custom object in the Schema Builder. We update the page layout for Opportunities to include the related list for Resumes.

Notes:

Lesson 5 – Creating a Resume Custom Tab

In this lesson, I discover the need to create a Custom Tab for the Resume object. This is because we created the Resume custom object using the Schema Builder, which doesn't give us the opportunity to create a corresponding custom tab for the object.

We then add the Resume custom tab to our Jobs and Recruiters app.

Notes:

Lesson 6 – Creating a Resume Submission Junction Object

In this lesson we create a Resume Submission junction object between Resume and Job Opportunities, using the Schema Builder.

Notes:

Lesson 7 – Resume Submissions User Interface Changes

In this lesson, we make user interface improvements to the resume submission process. We add a Resume Submissions related list to the Job Opportunity page layout. We also remove irrelevant fields from the Job Opportunity page layout.

Once have added the related list via the Enhanced Page Layout Editor we can then add the Resume Submissions related list to the corresponding Lightning Page for Job Opportunities.

Notes:

Lesson 8 – Editing Search Layouts

In this lesson we discuss the different types of Search Layouts that can be customized.

Notes:

Lesson 9 – Using the Page Layout Editor

In this lesson, we use the Page Layout Editor to Edit the page layout for Resume records. We address how to add buttons and fields to the page layout, tab order, and also adjust the columns displayed in related lists.

We then review the page layout edits in Classic and in Lightning. This is followed by creating a new page layout by using an existing page layout. In this new page layout, we add Quick Actions to the Salesforce Classic Publisher.

We rename the Job Opportunity page layout as well.

Notes:

Lesson 10 – Creating a Custom Tab for Resume Submissions

In this lesson, we create a custom tab for the Resume Submission custom junction object. We did not create a tab for this object because we created it previously from within the Schema Builder.

Adding the Custom Tab makes Resume Submissions available in the All Items list in the App Launcher. We also look at how to add Resume Submissions to the list of objects available from the dropdown menu inside the Jobs & Recruiters console app.

Notes:

Lesson 11 – Adding Smart Search Items to Mobile Navigation

In this lesson, we add the Smart Search Items option to the Mobile Navigation Menu. This adds a Recent menu option as well as a More link to see all available objects in the mobile navigation menu.

Notes:

Module Review and Assignments

We covered a lot of ground in this module. We created a Jobs and Recruiters app. We created several custom objects, a junction object, and several custom fields, all from within the Schema Builder.

We also enhanced the application further by editing search layouts. In addition, we became more familiar with the Enhanced Page Layout Editor and also used the Lightning App Builder to create Lightning pages.

We also created custom tabs and even added the Smart Search Items menu item to the Salesforce Mobile Navigation Menu. Now it's time to apply the skills that you've acquired during this module by completing the assignment(s) below.

Module Assignment

To further extend the Jobs and Recruiters application, create a custom object called 'Jobs Website'.

This new custom object is intended to house a single record for each of the primary job/employment websites that you typically would be searching for jobs on and/or posting your resume to. Examples would be Dice.com, Monster.com, CareerBuilder.com, etc.

Once you have created this custom object, create a URL field on the new custom object called 'Home Page' with a field type of URL.

Create an additional custom URL field on the Jobs Website custom object called 'My Profile URL'.

Once you have created the custom object and fields, enter an individual Jobs Website record for each Job Website that you currently have a profile on or have uploaded a resume to.

Stretch Assignment

For this module's stretch assignment, we will adjust the Lead Object to incorporate this new Jobs Website custom object. Add a Lookup field on the Lead object called Jobs Website, that looks up to the Jobs Website custom object.

Then create a validation rule on the Lead Object so that whenever the Lead Source on the Lead object equals Web that the Jobs Website field has to be filled in.

Since we are now going to be capturing additional information related to the Jobs Website on the Lead Record, we need to carry this information over to the Job Opportunity during the lead conversion process. What additional fields and/or field mappings might you need in order to round out this requirement?

We will be discussing this further on this week's group coaching call.

[illegible]
