

WORKFORCE ADMINISTRATION SOLUTION



Workforce Empowerment Hub

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Abstract

A **Workforce Administration Solution** is a comprehensive system designed to streamline human resource management within an organization. It includes functionalities such as employee onboarding, time tracking, payroll processing, and benefits administration, all integrated into a single platform. This consolidation reduces administrative burdens, enhances data accuracy, and promotes a more organized work environment.

The benefits of such a solution are significant. First, it increases efficiency by automating routine tasks like timekeeping and payroll calculations, minimizing errors and allowing HR personnel to focus on strategic initiatives. Centralized data management ensures that employee information is easily accessible and up-to-date, boosting overall productivity. Second, it improves compliance and reporting capabilities, helping organizations stay aligned with labor laws and regulations while providing tools to maintain accurate records. Enhanced reporting features allow HR teams to generate valuable insights into workforce trends, facilitating informed decision-making about staffing and employee engagement.

A Workforce Administration Solution equips organizations to cultivate a more adaptive, informed, and compliant workforce, driving improved performance and fostering higher levels of employee satisfaction.

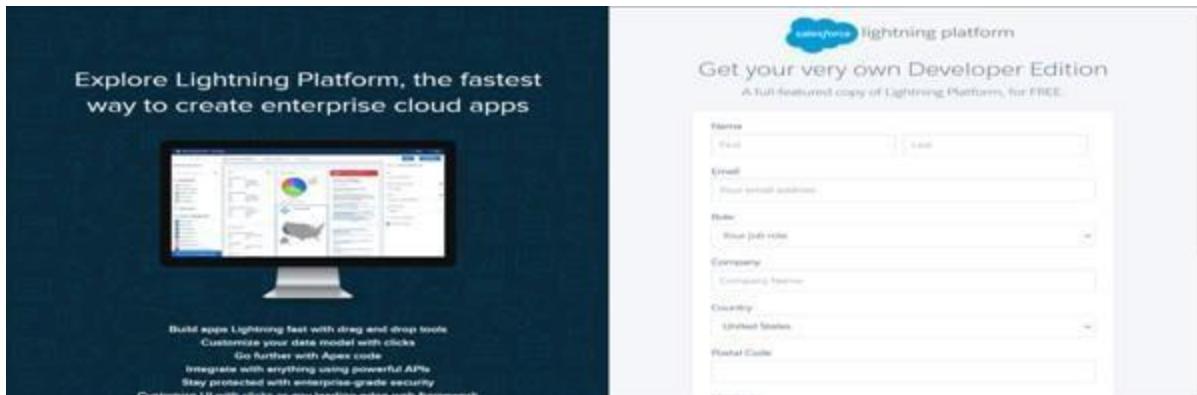
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1. Creating a Developer Account in Salesforce

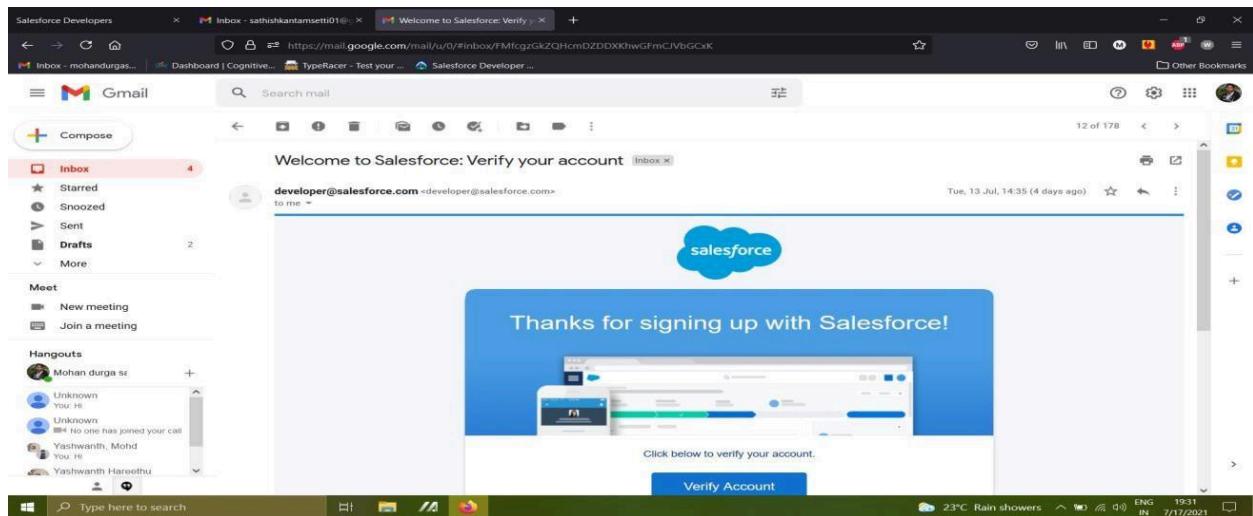
Step 1: Sign Up for a Developer Org

1. Go to <https://developer.salesforce.com/signup> .
2. Click on "Sign Up."
3. Fill out the Sign-Up Form with the following details:
 - First Name & Last Name
 - Email
 - Role: Developer
 - Company: [Your College Name]
 - Country: India
 - Postal Code: [Your PinCode]
 - Username: Create a username using a combination of your name and company. This does not need to be a valid email; you can format it as username@organization.com.
4. Click on "Sign Up" after filling in all the details.



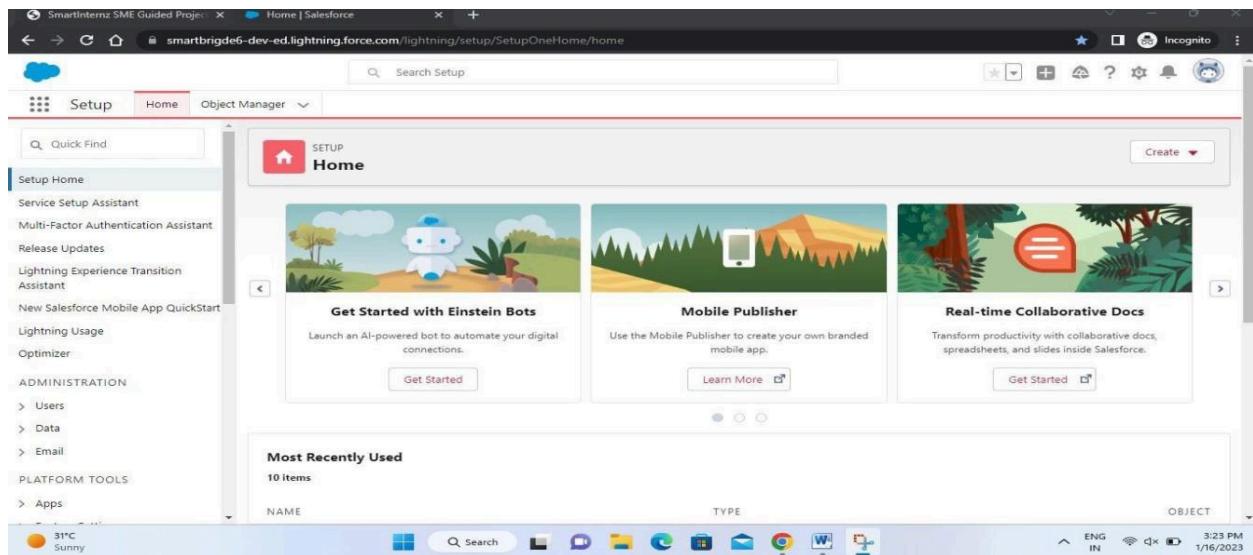
Step 2: Account Activation

1. Go to your email inbox that you used for signing up.
2. Find the verification email from Salesforce and click on the "Verify Account" link to activate your account.
 - Note: The email might take 5-10 minutes to arrive.



Step 3: Login to Your Salesforce Account

1. Go to login.salesforce.com.
2. Enter your **username** and **password** created during the sign-up process.
3. **Login** to access your Salesforce Developer account.
 - You will see the home page after logging in.



2. Salesforce Objects

Salesforce objects are database tablesthat allow you to store data specific to an organization. Objects in Salesforce are of two types:

1. **Standard Objects:** These are the pre-built objects provided by Salesforce, such as Users, Contracts, Reports, Dashboards, and more. Standard objects form the foundation of Salesforce's data structure and cover common business scenarios.
2. **Custom Objects:** These are user-defined objects created to store data that is unique to your organization's needs. In the context of the Workforce Administration Solutions, examples of custom objects include **Employee, Project, Project Task, Asset, Asset Service**.

2.1. Creating Employee custom object

In the Workforce Administration Solutions, we need to create custom objects: **Employee, Project, Asset, and Others**. The following steps will guide you through the process of creating these objects in Salesforce.

Step 1: Access Setup

1. Click on the gear icon in the upper-right corner of Salesforce.
2. Select "Setup" from the dropdown menu.

Step 2: Open Object Manager

1. Click on the "Object Manager" tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **ObjectManager** page, look to the right side of the screen.
2. Click on the "Create" dropdown and select **CustomObject**.

Step 4: Create "Employee" Object

1. On the **Custom Object Definition** page, enter the following details:
 - **Label:** Employee
 - **Plural Label:** Employees
 - **Record Name:** Employee

2. Check the following boxes:

- Allow Reports
- Allow Search

3. Click "Save" to create the object.

Step 5: Create a Custom Tab for "Employee"

1. Click the "Home" tab and enter "Tabs" in the Quick Find search bar.
2. Select "Tabs" from the search results.
3. Under **CustomObject Tabs**, click **New**.
4. For **Object**, select **Employee**.
5. For **Tab Style**, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. Click "Next" again, then **Save**.

2.2. Creating the Project Object

The following steps will guide you through the process of creating the **Project** object in Salesforce

Step 1: Access Setup

1. Click on the gear icon in the upper-right corner of Salesforce.
2. Select "Setup" from the dropdown menu.

Step 2: Open Object Manager

1. Click on the "Object Manager" tab located next to the Home tab.

Step 3: Create a Custom Object

1. On the **ObjectManager** page, look to the right side of the screen.
2. Click on the "Create" dropdown and select **CustomObject**.

Step 4: Create "Project" Object

1. On the **Custom Object Definition** page, enter the following details:
 - **Label:** Project
 - **Plural Label:** Projects
 - **Record Name:** Projects
2. **Check the following boxes:**
 - **Allow Reports**
 - **Allow Search**
3. **Click "Save"** to create the object.

Step 5: Create a Custom Tab for "Project"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
2. **Select "Tabs"** from the search results.
3. Under **CustomObject Tabs**, click **New**.
4. For **Object**, select **Projects**.
5. For **Tab Style**, select any icon that represents your object.
6. Leave all other settings as defaults and click **Next**.
7. **Click "Next"** again, then **Save**.

2.3. Creating the Project Task Object

The following steps will guide you through the process of creating the **ProjectTask** object in Salesforce.

Step 1: Access Setup

1. **Click on the gear icon** in the upper-right corner of Salesforce.
2. **Select "Setup"** from the dropdown menu.

Step 2: Open Object Manager

1. **Click on the "Object Manager" tab** located next to the Home tab.

Step 3: Create a Custom Object

1. On the **ObjectManager** page, look to the right side of the screen.
2. **Click on the "Create" dropdown** and select **CustomObject**.

Step 4: Create "Project Task" Object

1. On the **Custom Object Definition** page, enter the following details:
 - **Label:** Project Task
 - **Plural Label:** Project Tasks
 - **Record Name:** Project Task
2. **Check the following boxes:**
 - **Allow Reports**
 - **Allow Search**
3. **Click "Save"** to create the object.

Step 5: Create a Custom Tab for "Project Task"

1. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.
2. **Select "Tabs"** from the search results.
3. Under **CustomObject Tabs**, click **New**.
4. For **Object**, select **Asset**.
5. For **Tab Style**, select any icon that represents your object.

2.4. Creating the Asset Object

The following steps will guide you through the process of creating the **ProjectTask** object in Salesforce.

Step 1: Access Setup

1. **Click on the gear icon** in the upper-right corner of Salesforce.
2. **Select "Setup"** from the dropdown menu.

Step 2: Open Object Manager

2. **Click on the "Object Manager" tab** located next to the Home tab.

Step 3: Create a Custom Object

3. On the **ObjectManager** page, look to the right side of the screen.
4. **Click on the "Create" dropdown** and select **CustomObject**.

Step 4: Create "Project Task" Object

4. On the **Custom Object Definition** page, enter the following details:
 - **Label:** Asset
 - **Plural Label:** Assets
 - **Record Name:** Asset

5. **Check the following boxes:**

- **Allow Reports**
- **Allow Search**

6. **Click "Save"** to create the object.

Step 5: Create a Custom Tab for "Asset"

6. **Click the "Home" tab** and enter "Tabs" in the Quick Find search bar.

7. **Select "Tabs"** from the search results.

8. Under **CustomObject Tabs**, click **New**.

9. For **Object**, select **Asset**.

10. For **Tab Style**, select any icon that represents your object.

2.5. Creating the "Asset Service" Object

The following steps will guide you through the process of creating the Asset object in Salesforce.

Step 1: Access Setup

1. **Click on the gear icon** in the upper-right corner of Salesforce.

2. **Select "Setup"** from the dropdown menu.

Step 2: Open Object Manager

3. **Click on the "Object Manager" tab** located next to the Home tab.

Step 3: Create a Custom Object

5. On the **ObjectManager** page, look to the right side of the screen.

6. **Click on the "Create" dropdown** and select **CustomObject**

Step 4: Create "Asset" Object

7. On the **Custom Object Definition** page, enter the following details:

- **Label:** Asset Service
- **Plural Label:** Asset Services
- **Record Name:** Asset Service

8. **Check the following boxes:**

- **Allow Reports**
- **Allow Search**

9. **Click "Save"** to create the object.

Step 5: Create a Custom Tab for "Asset Service"

11. Click the **"Home"** tab and enter "Tabs" in the Quick Find search bar.
12. Select **"Tabs"** from the search results.
13. Under **CustomObject Tabs**, click **New**.
14. For **Object**, select **Asset Service**.
15. For **Tab Style**, select any icon that represents your object

3. The Lightning App

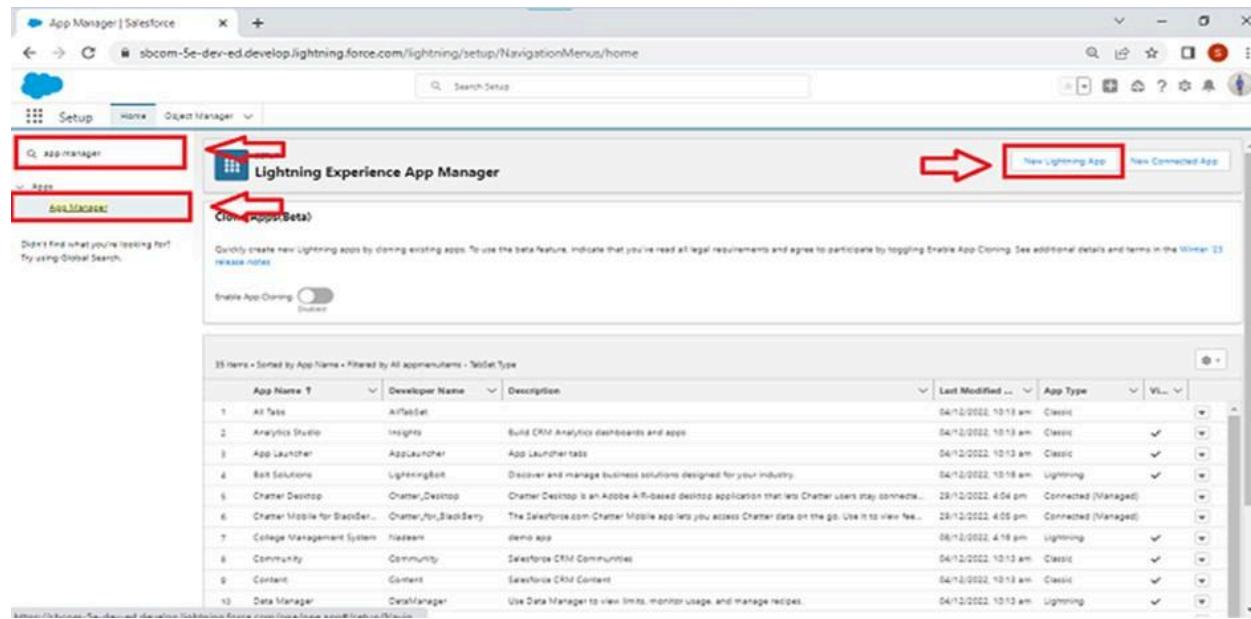
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Create a Lightning App

To create a lightning app page:

1. Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



The screenshot shows the Salesforce App Manager interface. At the top, there are navigation tabs for 'Setup', 'Home', and 'Object Manager'. A search bar is present. The main area is titled 'Lightning Experience App Manager' with a sub-section 'Cloud (Preview Beta)'. A red arrow points to the 'Cloud (Preview Beta)' button. Another red arrow points to the 'New Lightning App' button. The bottom half of the screen displays a table of existing apps, with a red arrow pointing to the table header. The table columns include 'App Name', 'Developer Name', 'Description', 'Last Modified', 'App Type', and 'Vis...'. The table lists various apps like 'All Tabs', 'Analytics Studio', 'App Launcher', etc.

2. Fill the app name in app details and branding as follow

App Name : Workforce Administrator Solution

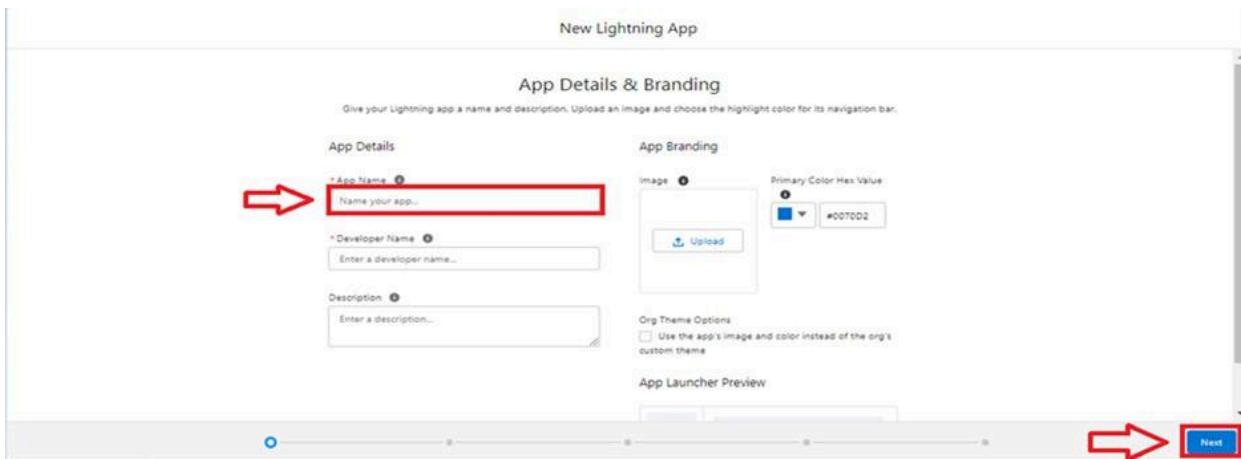
Developer Name : this will auto populated

Description : Give a meaningful description

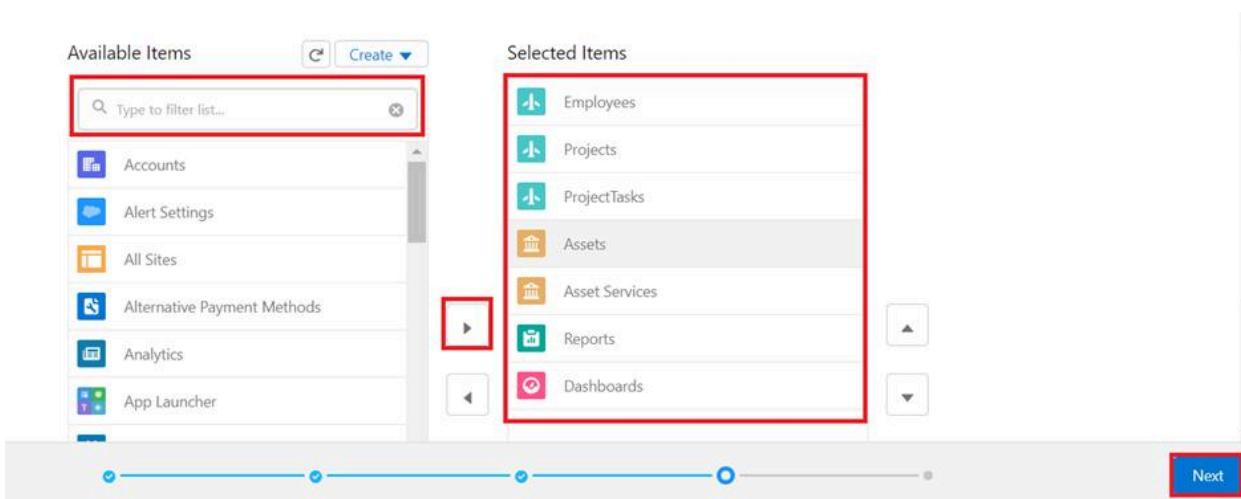
Image : optional (if you want to give any image you can otherwise not mandatory)

Primary color hex value : keep this default

3. Then click Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default -> Next



4. To Add Navigation Items

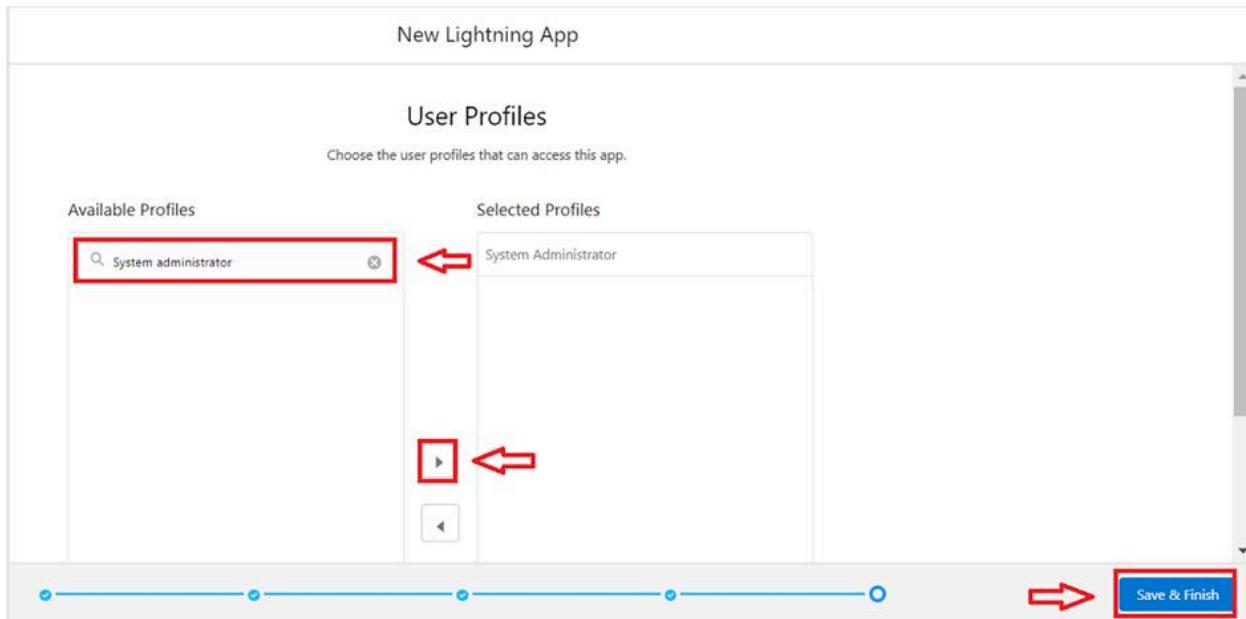


Search the items in the search bar(Employees, Projects, ProjectTask, Assets, Asset Services, Reports, Dashboard)

from the search bar and move it using the arrow button --> Next.

Note: select asset the custom object which we have created in the previous activity.

5. To Add User Profiles:



searchprofiles(Systemadministrator)inthesearchbar-->clickonthearrowbutton-->save&finish

4. Fields & Relationships

Fields represent the data stored in the columns of a relational database. It can hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields :

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation.

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Creating Text Field in Employee Object

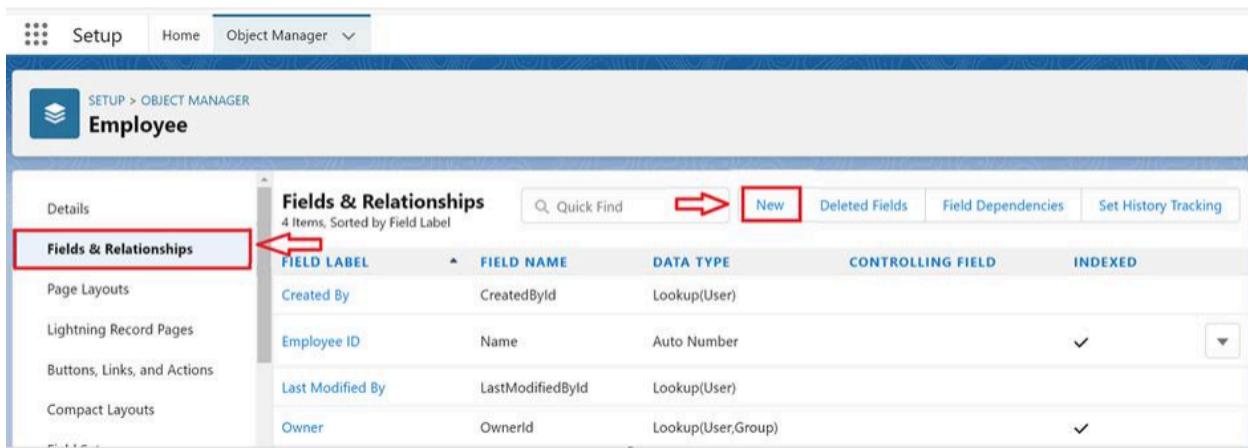
To create fields in an object:

1. Go to setup --> click on Object Manager --> type object name(Employee) in quick find bar --> click on the object.



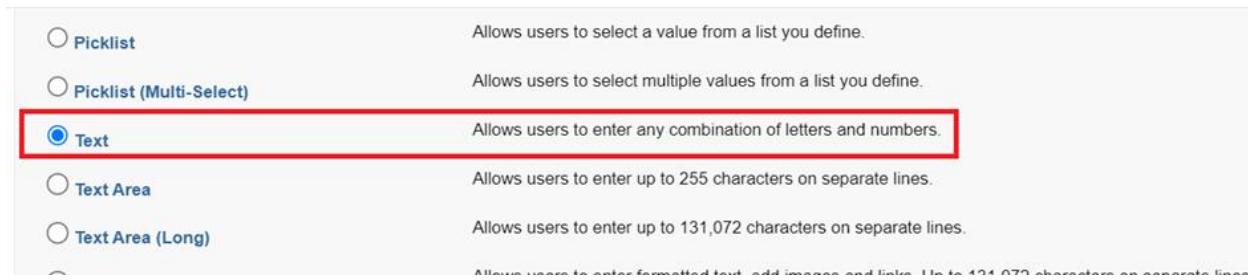
The screenshot shows the Salesforce Object Manager. The top navigation bar has 'Object Manager' selected. A red box highlights the 'Object Manager' tab, and a red arrow points to it. Another red box highlights the search bar containing 'Employee', and a red arrow points to it. The main table lists one item: 'Employee' (Label), 'Employee_c' (API Name), 'Custom Object' (Type), and '20/06/2023' (Last Modified). A red box highlights the 'Employee' label in the table, and a red arrow points to it.

2. Now click on “Fields & Relationships” --> New



The screenshot shows the 'Fields & Relationships' page for the Employee object. The top navigation bar has 'Object Manager' selected. A red box highlights the 'Employee' object name, and a red arrow points to it. The main table lists four fields: 'Created By', 'Employee ID', 'Last Modified By', and 'Owner'. A red box highlights the 'Fields & Relationships' tab in the sidebar, and a red arrow points to it. Another red box highlights the 'New' button in the top right, and a red arrow points to it.

3. Select Data type as “Text”



The screenshot shows the 'Data Type' selection page. It lists several options: 'Picklist', 'Picklist (Multi-Select)', 'Text' (which is selected and highlighted with a red box and a red arrow), 'Text Area', and 'Text Area (Long)'. Each option has a description to its right. The 'Text' option is described as 'Allows users to enter any combination of letters and numbers.'

4. Click on Next

Employee
New Custom Field

Help for this Page 

Step 2. Enter the details Step 2 of 4

Previous  Next 

Field Label	<input type="text" value="Employee Name"/> 	
Length	<input type="text" value="18"/> 	
Field Name	<input type="text" value="Employee_Name"/> 	
Description	<input type="text"/>	

5. Fill the above as following:

1 Field Label: Employee Name

2 Length : 18

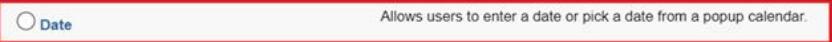
3 Field Name : gets auto generated

4 Click on Next --> Next --> Save and new.

Creating Date of Birth Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1

2. Select Data type as “Date” and click Next

<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> 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.
<input checked="" type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar. 
<input type="radio"/> 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.
<input type="radio"/> 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

3. Click on Next.

4. Fill the above as following:

a. Field Label: Date of Birth.

b. Field Name : gets auto generated.

c. Click on Next --> Next --> Save and new.

Creating Formula Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1

2. Select Data type as “Formula” and click Next.

3. Give Field Label and Field Name as “Age” and select formula return type as “Number” and click next

Step 2. Choose output type

Step 2 of 5

Field Label Age ←

Field Name Age ←

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

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value.
Example: `TODAY() > CloseDate`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost_c`

Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `(Next = NOW() + 1)`

Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius_c + 32` ←

Previous Next ←

4. Under Advanced Formula write down the formula and click “Check Syntax” and Next -> Next --> Save & New.

Step 3. Enter formula

Step 3 of 5

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Fahrenheit = 1.8 * Celsius_c + 32` [More Examples...](#)

Simple Formula Advanced Formula

Insert Field Insert Operator

`Age (Number) =` YEAR(TODAY()) - YEAR(Date_of_Birth_c)

Check Syntax No syntax errors in merge fields or functions. (Compiled size: 71 characters)

Quick Tips

- Getting Started
- Operators & Functions

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

Description

Creating Picklist Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Picklist” and click Next.
3. Enter Field Label as “Gender”, under values select “Enter values, with each value separated by a new line”

Step 2. Enter the details Step 2 of 4

Field Label: Gender

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

Male
Female

Display values alphabetically, not in the order entered

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name: Gender

Description:

Help Text:

Previous Next Cancel

4. Click Next --> Next --> Next --> Save & New.

Creating Self-Relationship Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Lookup Relationship” and click Next.
3. Select Employee from the drop down related to the field and click Next.

Employee New Relationship Help for this Page

Step 2. Choose the related object Step 2

Select the other object to which this object is related.

Related To: Employee

Previous Next Cancel

Previous Next Cancel

4. Give Field Label as “Reports to” and click Next.

5. Next --> Next --> Save & New.

Creating Master-Detail Relationship between Employee & Asset Object

To Create a Master-Detail relationship

1. Go to the setup page --> click on object manager --> type object name(ProjectTask) in the quick find bar --> click on the object.
2. Click on fields & relationship --> click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. For field label related to: select “Employee” object and click Next.
5. Give Field Label as “Employee Name” and click Next.
6. Next --> Next --> Save & New.

Creating Remaining Fields in Employee Object

Repeat the above steps to create many fields.

5. Setting OWD

Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth).

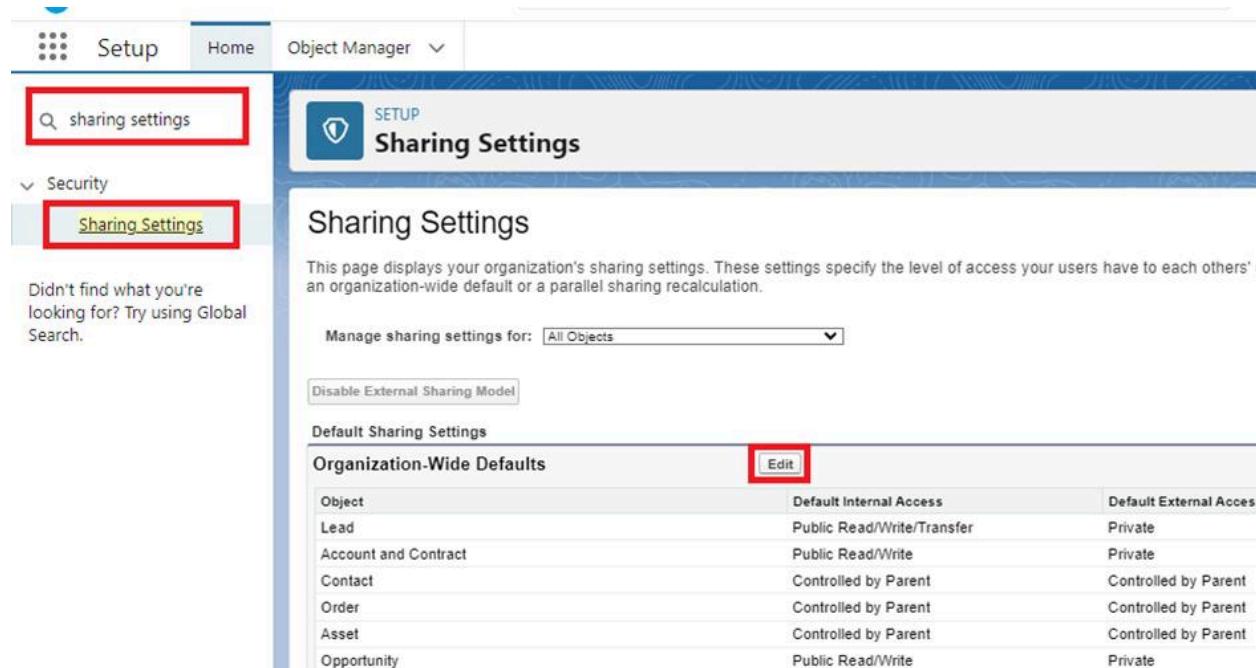
Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

1. Public Read/Write/Transfer
2. Public Read/Write
3. Public Read/Only
4. Private

Data is the most precious thing of any organization and keeping it safe is the first most priority of any Admin in the organization. As an Admin, to ensure data privacy and compliance with regulations, you need to restrict access to sensitive customer information using OWD.

Create OWD Setting

1. Go to Set Up --> in the Quick Find box type "Sharing Settings" --> click on it.
2. Click Edit in the Organization-Wide Defaults area.



Object	Default Internal Access	Default External Access
Lead	Public Read/Write/Transfer	Private
Account and Contract	Public Read/Write	Private
Contact	Controlled by Parent	Controlled by Parent
Order	Controlled by Parent	Controlled by Parent
Asset	Controlled by Parent	Controlled by Parent
Opportunity	Public Read/Write	Private

3. Search for the Employee object.
4. Under default internal access and default external access change the options to "Private" and under grant access using hierarchies select the check box.

5. Click on save.

Work Type Group	Public Read/Write	Private	<input type="checkbox"/>
Asset	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset Service	Public Read/Write	Private	<input checked="" type="checkbox"/>
Employee	Private	Private	<input checked="" type="checkbox"/>
Project	Public Read/Write	Public Read/Write	<input type="checkbox"/>

Other Settings

Standard Report Visibility 

Manual User Record Sharing 

Manager Groups 

Save **Cancel**

6. This Setting is for all the Users Which have been Created.

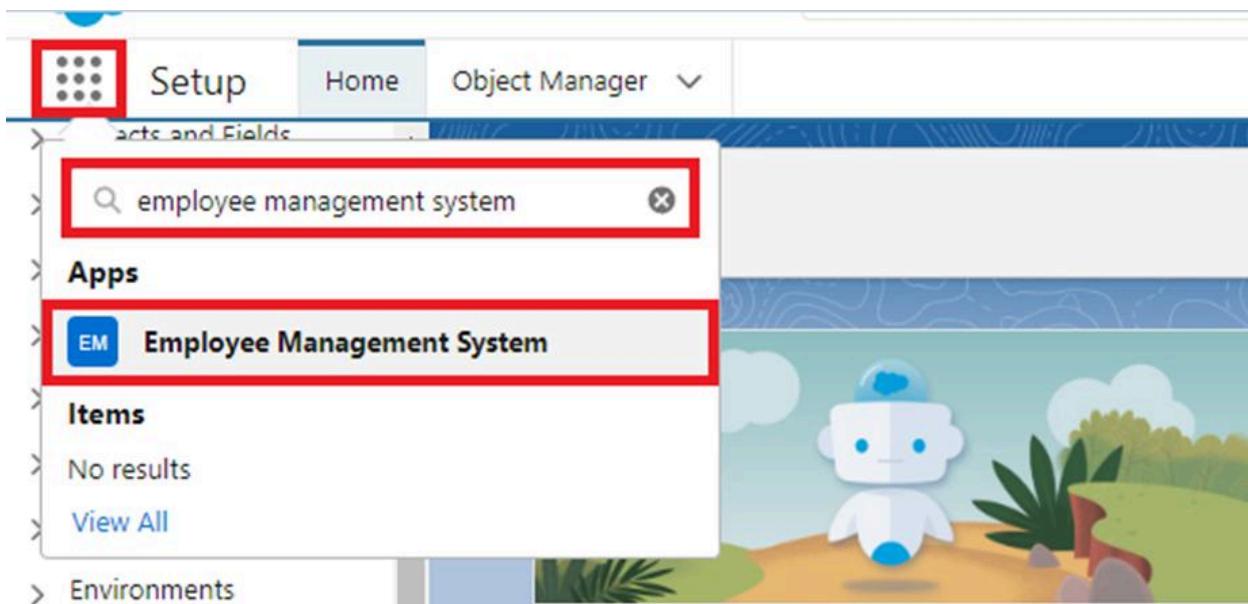
Set OWD as Private for Project and Asset Service objects.

6. User Adoption

As a new Administrator, I perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more.

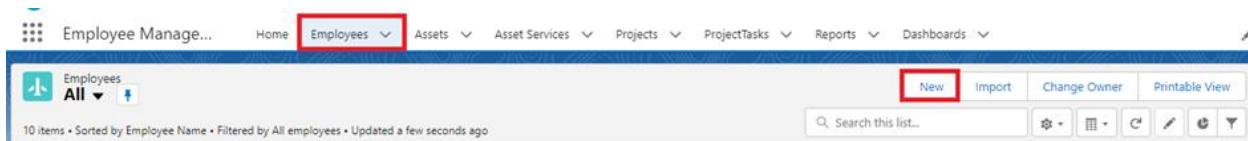
Create a Record (Employee)

1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.



3. Click on the Employee tab.

4. Click New.



5. Fill the Details and click on Save.

View a Record (Employee)

1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.

3. Click on the Employee Tab.
4. Click on any record name. you can see the details of the Employee

Delete a Record (Employee)

1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.
3. Click on the Employee Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.

7. Import Data

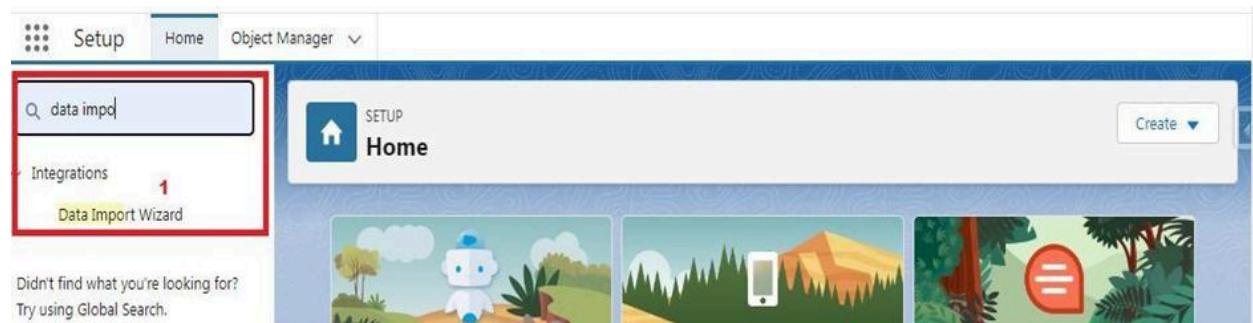
Link: <https://tinyurl.com/SF-Employee-Data>

Before creating the application download this file from the URL given below and save the file in CSV. Data Import lets to upload data from external sources and combine it with data you collect via Analytics. Use Analytics to organize and analyze all data in ways that better reflect your business.

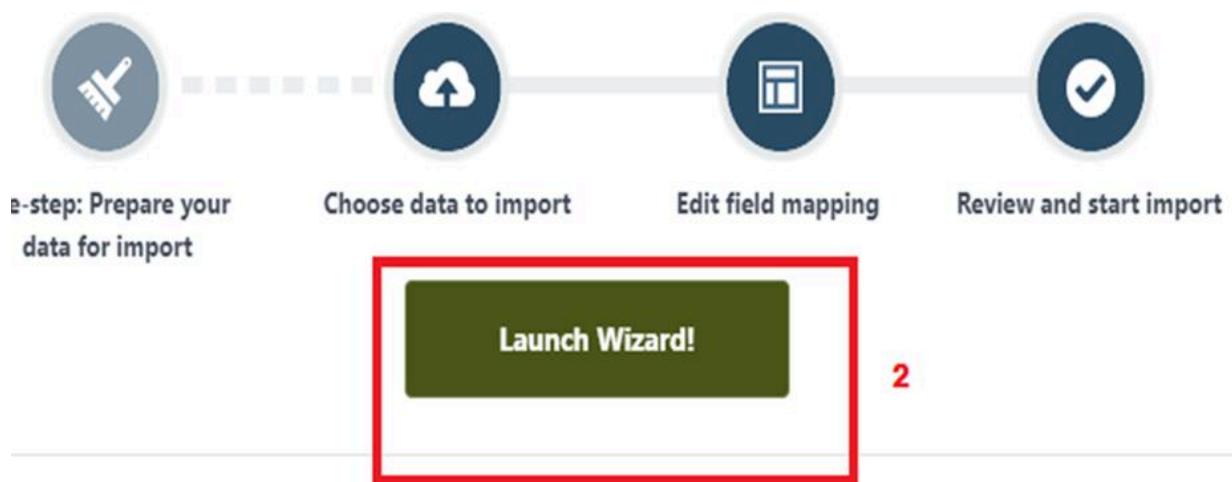
The Data Import Wizard is a Tool makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects.

Importing data using Data Wizard

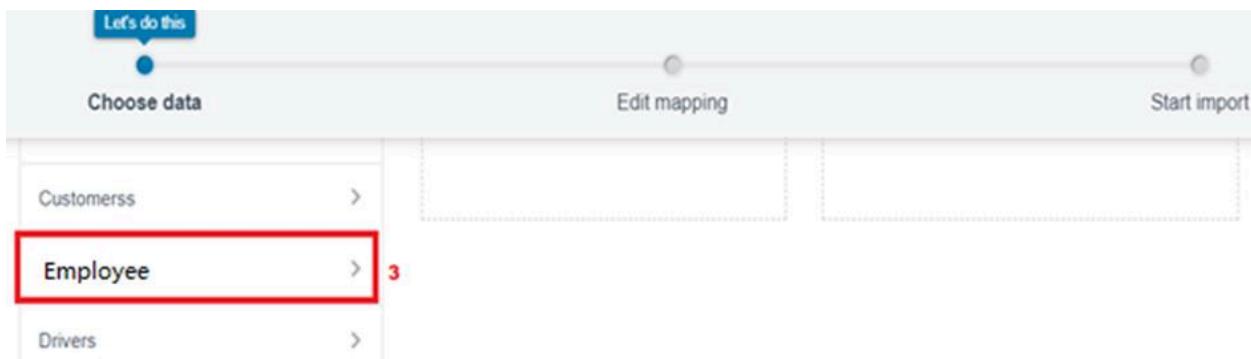
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



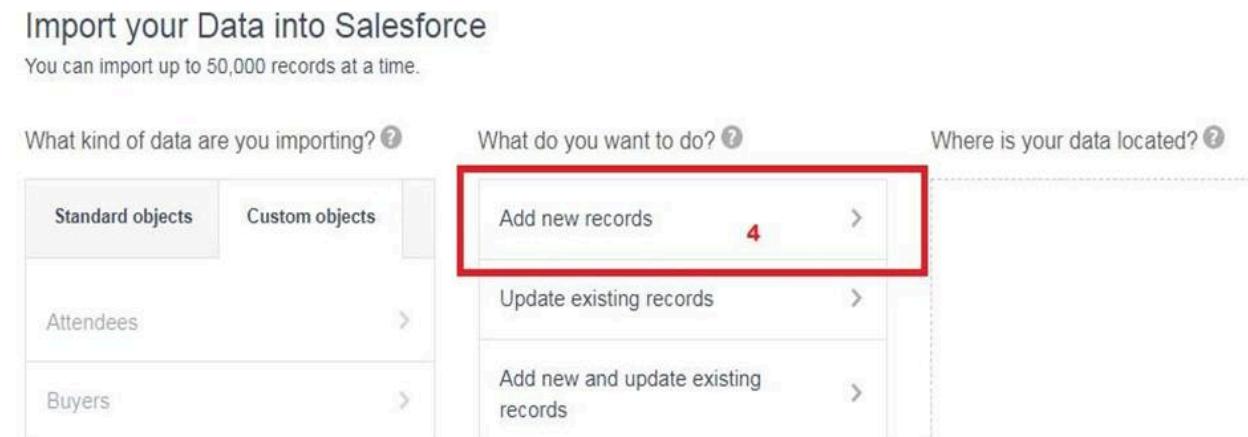
3. Click Launch Wizard!



4. Click the Custom Objects tab and select the Employee object.



5. Select Add new records.



6. Click CSV and choose file Employee_CSV which we made earlier. Click Next.

Choose data

What kind of data are you importing? ?

Standard objects Custom objects

Attendees

Buyers

Customers

Departments ✓

What do you want to do? ?

Add new records ✓

Match by: ?
--None--

Which User field in your file designates record owners? ?
--None--

Trigger workflow rules and processes? ?
 Trigger workflow rules and processes for new and updated records

Where is your data located? ?

Drag CSV file here to upload

CSV 5

Cancel Previous **Next**

7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

Setup Home Object Manager

Search Setup

Almost done

Choose data Edit mapping Start import

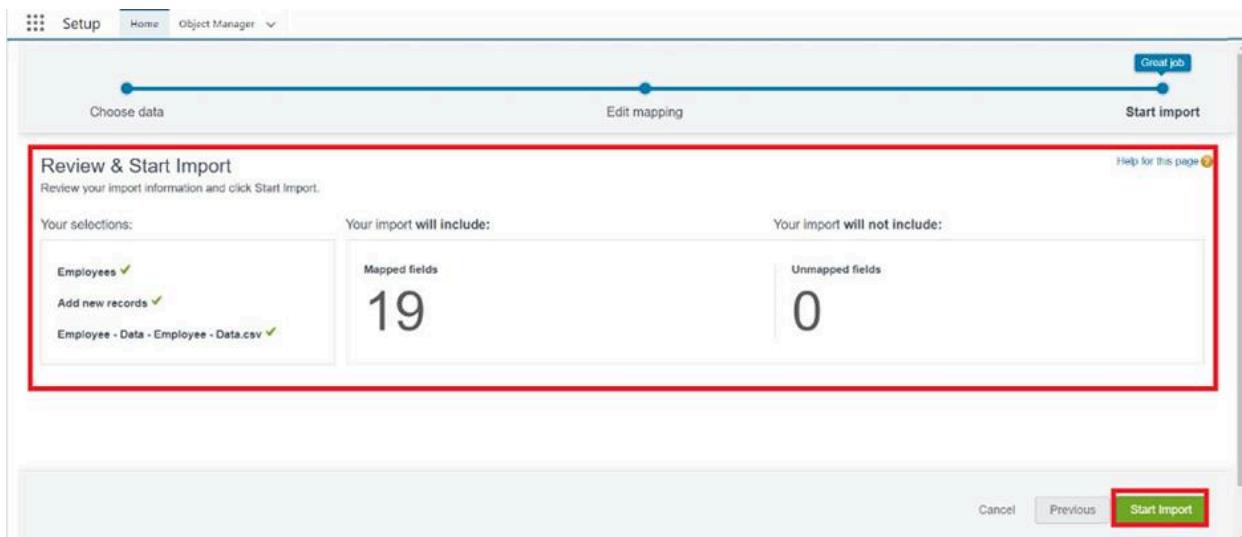
Edit Field Mapping: Employees

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Employee Name	Employee Name	Jackie Chan	James	Benjamin
Change	Date of Birth	Date of Birth	01/01/1993	27/02/1996	16/03/1999
Change	Gender	Gender	Male	Male	Male
Change	Qualification	Qualification	B.Tech	B.Tech	B.Com
Change	Address	Address			
Change	Experience	Experience	9	6	5
Change	Phone no	Phone no	7995434750	7995434751	7995434752

Cancel Previous **Next**

Note: no need to map “Reports to” field. The Data Import Wizard is designed to handle basic data import tasks and does not support mapping relationships between records.

8. The next screen gives you a summary of your data import. Click Start Import



9. Click OK on the popup.

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.

OK

10. Scroll down the page and verify that your data has been imported under batches.

Batches												
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Memory Count	State Message	Status
View Request	View Result	7515000000JeYH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	100	60	0	14	0	0	Completed	

11. Make sure you have 0 records under the records failed column.

8. Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. 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. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

1. Contract Manager
2. Read Only
3. Marketing User
4. Solutions Manager
5. Standard User
6. System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

HR Profile

To create a new profile:

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (Standard user) --> enter profile name (HR) --> Save.

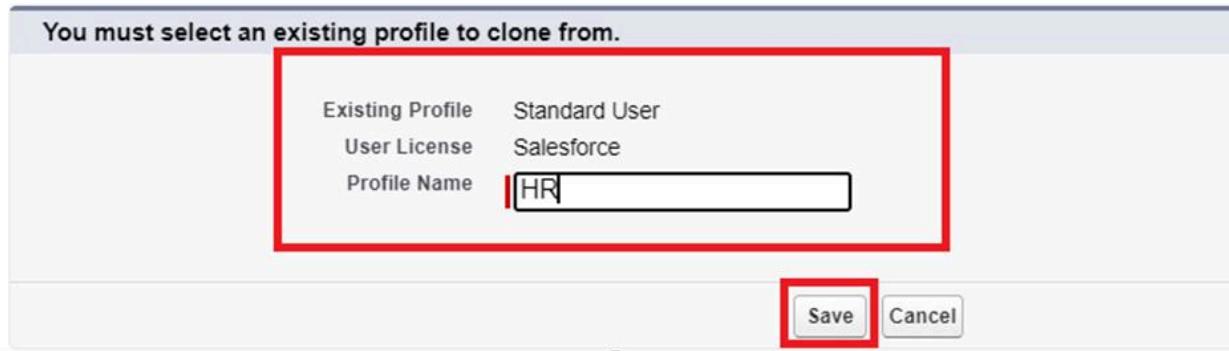
Clone Profile

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	<input type="text" value="HR"/>

Save **Cancel**



2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Assets and Asset Services objects

Custom Object Permissions

	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Assets	<input checked="" type="checkbox"/>						
Asset Services	<input checked="" type="checkbox"/>						
Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Session Settings

	Basic Access					Data Administration	
	Read	Create	Edit	Delete	View All	Modify All	
Projects	<input type="checkbox"/>						
ProjectTasks	<input type="checkbox"/>						



4. Scroll down and Click on Save.

Manager Profile

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (Salesforce Platform User) --> enter profile name (Manager) --> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Employee, Project and Project Task objects.
4. Scroll down and Click on Save.

Create Employee Profile

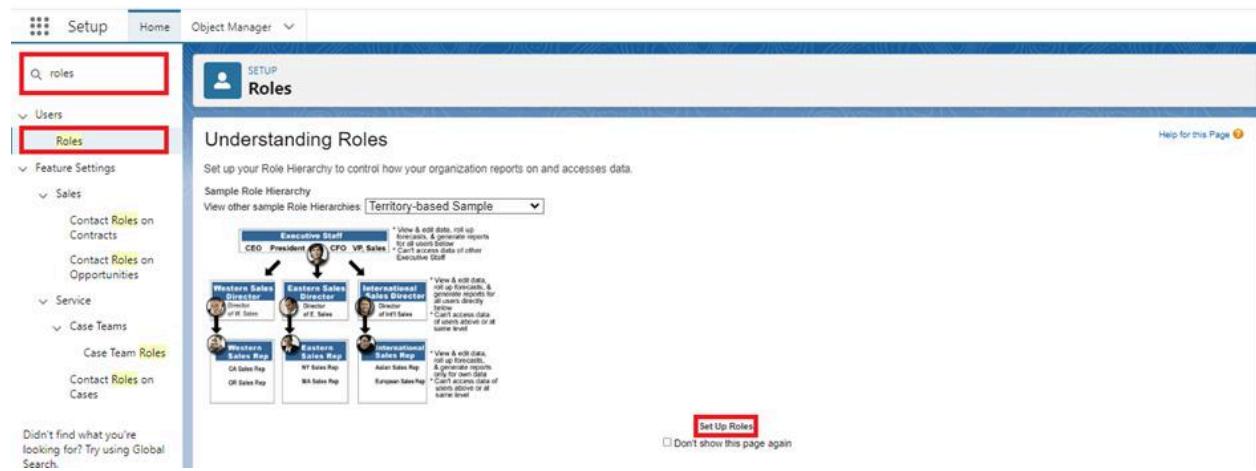
Create Employee Profiles for “On Site Employee”, “Remote Employee” as in above, but in step 3 only allow permission access for Project and Project Task objects only.

9. Role

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Creating HR Role

1. Go to quick find --> Search for Roles --> click on set up roles.



The screenshot shows the 'Roles' page in the Salesforce setup. The left sidebar is expanded to show 'Users' and 'Roles'. The main content area is titled 'Understanding Roles' with a sub-section 'Sample Role Hierarchy'. It shows a hierarchy starting from 'Executive Staff' (CEO, President, CFO, VP, Sales Director) which oversees 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each director oversees specific sales representatives. A tooltip for the 'International Staff' role indicates it can view and edit data, roll up forecasts, and generate reports for all users below it or of other executive staff. At the bottom right, there is a 'Set Up Roles' button and a 'Don't show this page again' checkbox.

2. Click on Expand All and click on add role under whom this role works.



The screenshot shows the 'Your Organization's Role Hierarchy' page. The 'Expand All' button is highlighted. The hierarchy for 'Nick Enterprises' includes 'CEO', 'HR', 'Manager', 'On Site Emp', and 'Remote Emp'. Each of these roles has an 'Add Role' button next to it. The 'CEO' role also has 'Edit | Del | Assign' buttons.

3. Give Label as "HR" and Role name gets auto populated. Check to whom this role (HR) reports. Then click on Save.

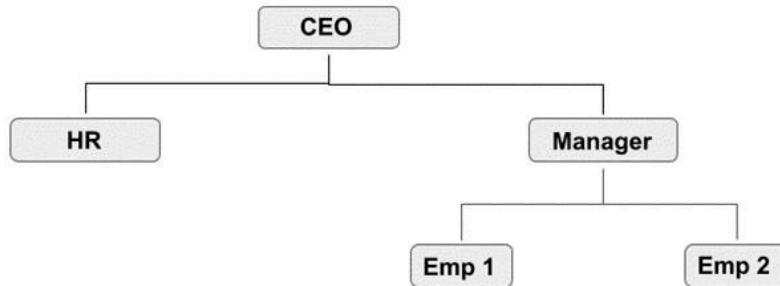
Role Edit
New Role

Role Edit

Label	<input type="text"/>
Role Name	<input type="text"/> [i]
This role reports to	<input type="text"/> [i] [s]
Role Name as displayed on reports	<input type="text"/>

[Save](#) [Save & New](#) [Cancel](#)

4. Refer the below diagram to understand which role reports to which role.



Role Hierarchy: The above diagram represents which role reports to which one.

Creating more roles

Create three more roles for Manager, On Site Employee, Remote Employee.

Note: On Site Employee and Remote Employee reports to Manager.

10. Users

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.

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. Each user account contains at least the following:

1. Username
2. Email Address
3. User's First Name (optional)
4. User's Last Name
5. Alias
6. Nickname
7. License
8. Profile
9. Role (optional)

Create User

1. Go to setup --> type users in quick find box --> select users --> click New user.
2. Fill in the fields
 1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name
 4. Email id : Give your Personal Email id
 5. Username : Username should be in this form: text@text.text
 6. Nick Name : Give a Nickname
 7. Role : HR
 8. User license: Salesforce
 9. Profiles : HR

3. Save.

Creating another user

1. Go to setup --> type users in quick find box --> select users --> click New user.
2. Fill in the fields
 - 1 First Name : Kol
 - 2 Last Name : Mikaelson
 - 3 Alias : Give a Alias Name
 - 4 Email id : Give your Personal Email id
 - 5 Username : Username should be in this form: text@text.text
 - 6 Nick Name : Give a Nickname
 - 7 Role : Manager
 - 8 User license : Salesforce Platform
 - 9 Profiles : Manager
3. Save.

Creating more users

Create two more users as we created in above

11. Page layouts

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

Creating a page layout for Employee object

To Create a Page layout:

1. Go to Setup --> Click on Object Manager --> Search for the object (Employee) --> From drop down click on Edit.

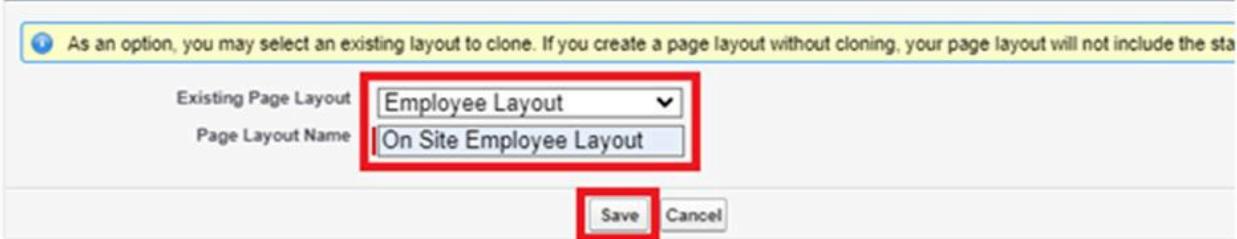


2. Click on Page layout --> Click on New.



3. Give Page layout Name as “On Site Employee Layout” and click on Save.

Create New Page Layout



As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections.

Existing Page Layout: Employee Layout

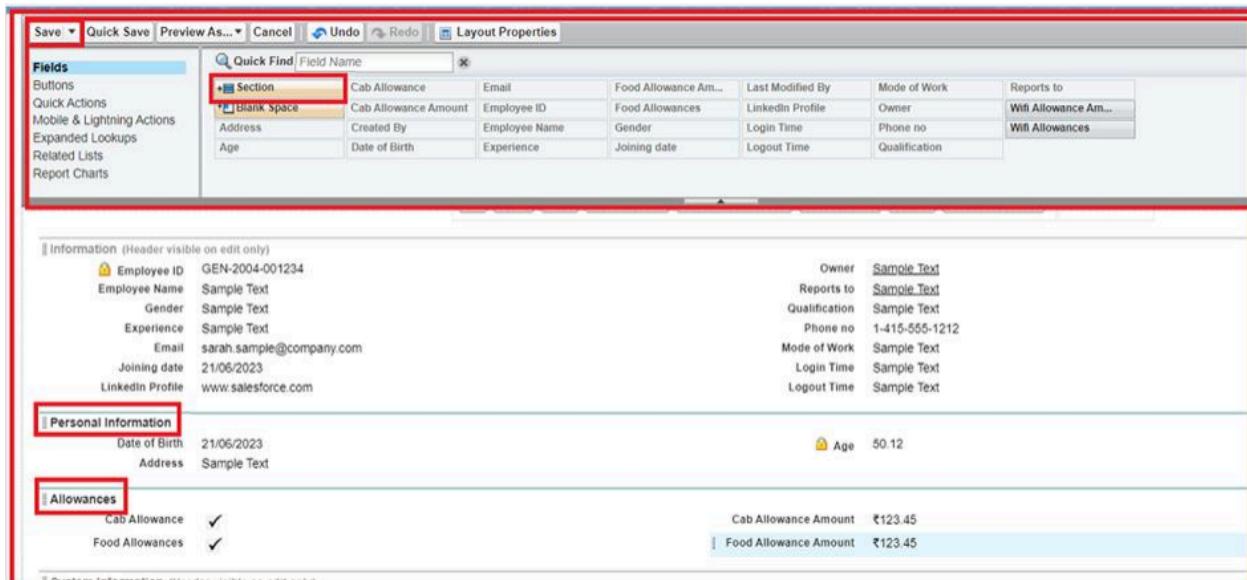
Page Layout Name: On Site Employee Layout

Save Cancel

4. Drag and drop the Section from the highlight panel below the Information and name it as “Personal Information” and click Ok.
5. Drag Date of Birth, Address and Age fields from Employee Information to Personal Information section.
6. Similarly perform the above step to create “Allowances” and add allowances fields in it as shown below.

Creating another page layout

Create another page layout and name it as “Remote Employee Layout”, and in the allowances section use only Wifi Allowance and Wifi Allowances Amount fields.



Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Section	Cab Allowance	Email	Food Allowance Am...	Last Modified By	Mode of Work	Reports to
Blank Space	Cab Allowance Amount	Employee ID	Food Allowances	LinkedIn Profile	Owner	Wifi Allowance Am...
Address	Created By	Employee Name	Gender	Login Time	Phone no	Wifi Allowances
Age	Date of Birth	Experience	Joining date	Logout Time	Qualification	

Information (Header visible on edit only)

Employee ID	GEN-2004-001234	Owner	Sample Text
Employee Name	Sample Text	Reports to	Sample Text
Gender	Sample Text	Qualification	Sample Text
Experience	Sample Text	Phone no	1-415-555-1212
Email	sarah.sample@company.com	Mode of Work	Sample Text
Joining date	21/06/2023	Login Time	Sample Text
LinkedIn Profile	www.salesforce.com	Logout Time	Sample Text

Personal Information

Date of Birth	21/06/2023	Age	50.12
Address	Sample Text		

Allowances

Cab Allowance	✓	Cab Allowance Amount	₹123.45
Food Allowances	✓	Food Allowance Amount	₹123.45

7. Click Save.
8. Make sure your page layout looks like the picture above

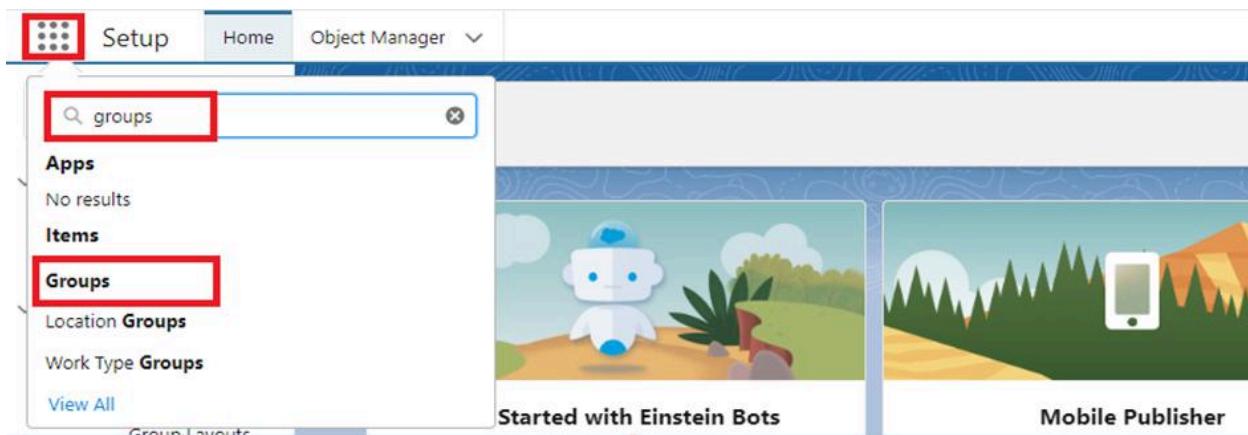
12.Chatter Group

Salesforce Chatter Groups are collaborative spaces within the Salesforce platform that enable teams to communicate, share information, and collaborate on projects. They provide a centralized hub for discussions, file sharing, and updates, allowing users to stay connected, streamline workflows, and enhance productivity.

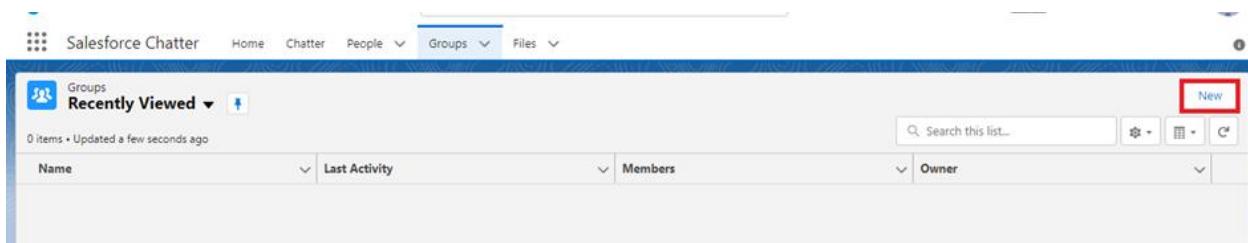
Creating a chatter group for your organization.

To Create a chatter group:

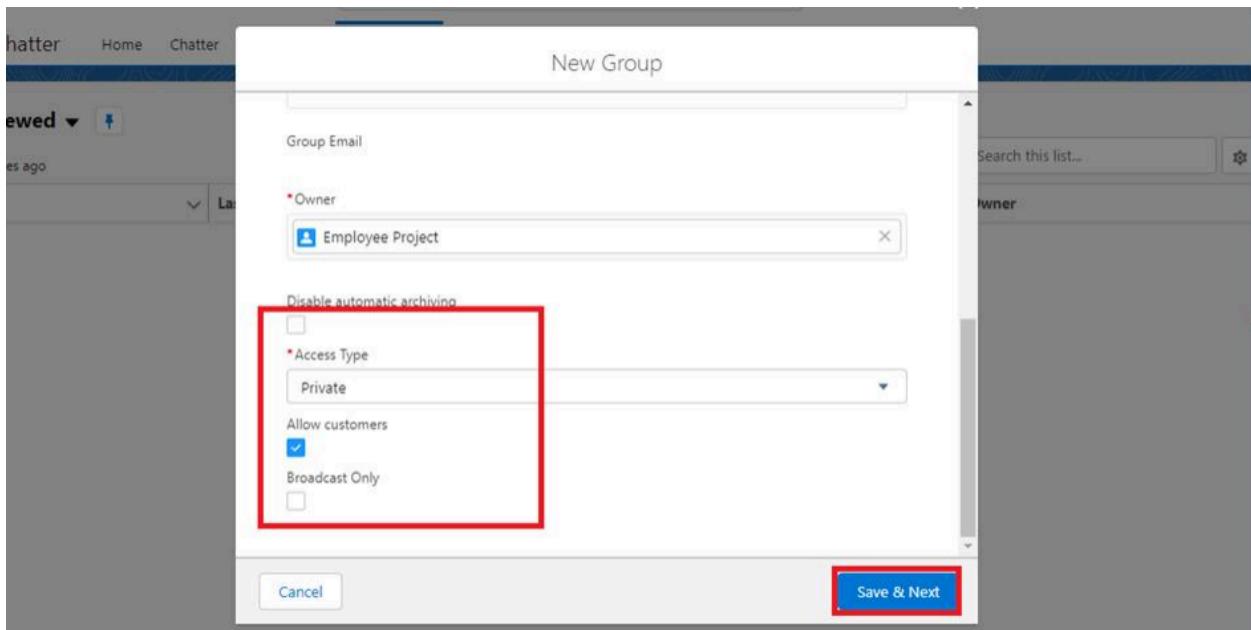
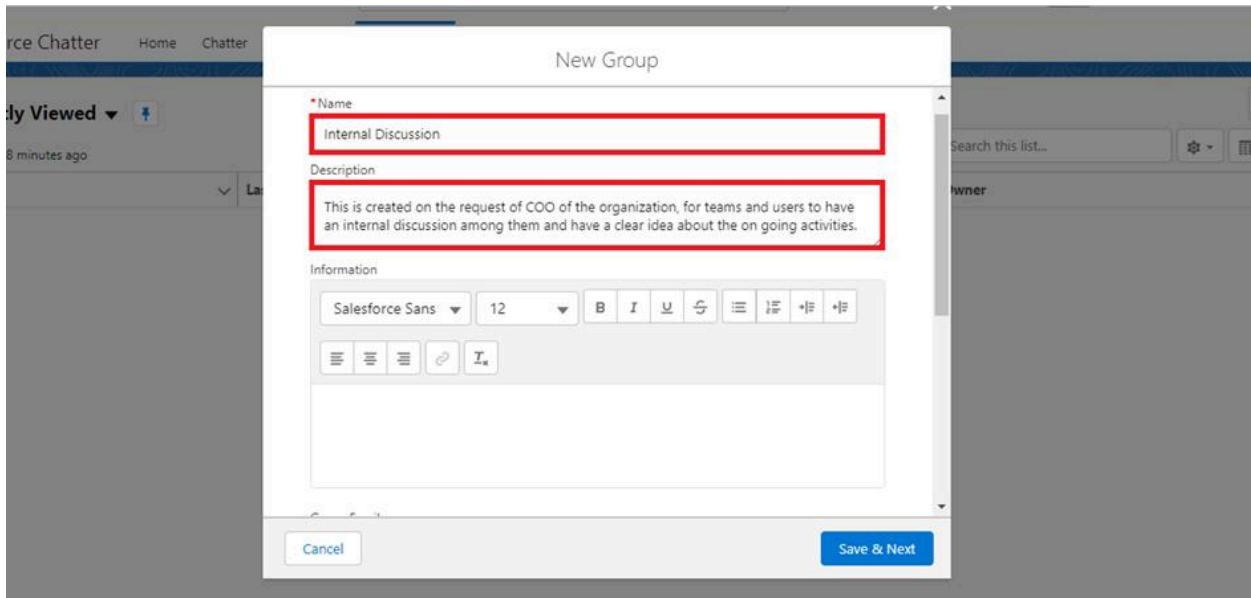
1. Click the App Launcher.
2. Enter Groups in the Search apps and items... box and select Groups.



3. Click New



4. Fill in the new group information with the same details



5. Click Save & Next. Skip the Upload Picture section and click Next.
6. On the Manage Members screen, click Add next to users you created in the previous activity

Manage Members

Search People...

Jason Mikaelson Member

Elijah Mikaelson Member

Kol Mikaelson Member

Niklaus Mikaelson

+ Add

Done

7. Click Done.

Internal Discussion

Private with Customers

Owner: Limited

Group Details

Description: This is created on the request of COO of the organization, for teams and users to have an internal discussion among them and have a clear idea about the on going activities.

Group Email: 0950000000UZGpCAO@post.5i-dwwwear.ap26.chatter.salesforce.com

Owner: Employee Project

Manage Members

Search People...

8. This is how your group interface looks like.
9. Where it says Share an update, post this message to the group: Welcome to the Internal Discussion Group, here you can post anything which is related to ongoing projects.
10. Click Share.

Note: You can like or comment on this post.

Note: there is a default chatter group in the org with all the active users in it, this activity is to show you how to create a chatter group and add users into it

13. Record Types

Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values. Record types allow administrators to create a different page layout with custom picklist fields and values for the same business process and various business processes.

Creating On Site Employee Record Type

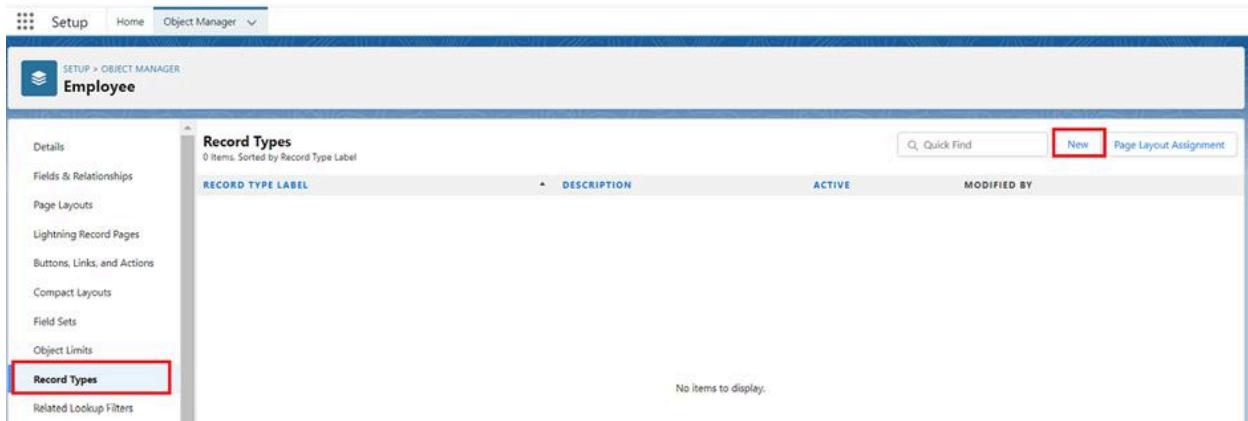
To create a Record Type:

1. Go to Setup --> click on Object Manager --> Search for the object (Employee) --> from drop down click Edit



The screenshot shows the Salesforce Object Manager interface for the 'Employee' object. The search bar at the top is set to 'Employee'. In the main table, the first row for 'Employee' is selected and highlighted with a red box. The 'Edit' button in the bottom right corner of the table is also highlighted with a red box.

2. From the left panel click Record Types --> New.



The screenshot shows the 'Record Types' page for the 'Employee' object. The left sidebar has a 'Record Types' link highlighted with a red box. The top right corner features a 'New' button, which is also highlighted with a red box.

3. Give Record Type Label as “On Site Employee” and make it active.

Step 1. Enter the details

Step 1 of 2

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type

Existing Record Type	Master	* = Required Information
Record Type Label	On Site Employee	
Record Type Name	On_Site_Employee	
Description		
Active	<input checked="" type="checkbox"/>	

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>

4. Uncheck for “Make Available”

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User		<input type="checkbox"/>	<input type="checkbox"/>

5. Scroll down and check for the Manager & System Administrator profile and click on Next.

Force.com - Free User	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
HR	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input type="checkbox"/>	<input type="checkbox"/>
Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>	<input type="checkbox"/>
On Site Employee	<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Remote Employee	<input type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	<input type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work.com Only User	<input type="checkbox"/>	<input type="checkbox"/>

6. Select “Apply a different layout for each profile”, and change page layout to On Site Employee Layout for manager profile and System Administrator.

Employee Record Type: On Site Employee

Record Type Name: On_Site_Employee

Description:

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

Apply one layout to all profiles Apply a different layout for each profile

Profile: Analytics Cloud Integration User **Page Layout:** Employee Layout

Profile: Analytics Cloud Security User **Page Layout:** Employee Layout

Profile	Page Layout
Custom: Sales Profile	Employee Layout
Custom: Support Profile	Employee Layout
Force.com - App Subscription User	Employee Layout
Force.com - Free User	Employee Layout
Gold Partner User	Employee Layout
HR	Employee Layout
Identity User	Employee Layout
Manager	On Site Employee layout
Marketing User	Employee Layout
Minimum Access - Salesforce	Employee Layout
On Site Employee	Employee Layout
Partner App Subscription User	Employee Layout
Partner Community Login User	Employee Layout
Partner Community User	Employee Layout
Read Only	Employee Layout
Remote Employee	Employee Layout
Salesforce API Only System Integrations	Employee Layout
Silver Partner User	Employee Layout
Solution Manager	Employee Layout
Standard Platform User	Employee Layout
Standard User	Employee Layout
System Administrator	On Site Employee layout
Work.com Only User	Employee Layout

Previous

7. click Save.

Creating "Remote Employee" Record Type

Create another Record Type with name "Remote Employee" as above.

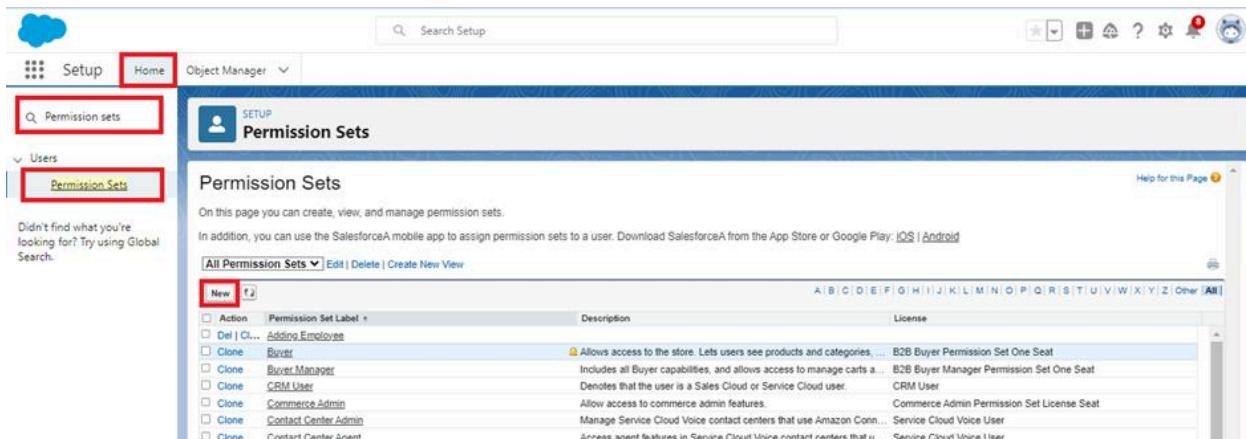
14. Permission sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

Creating a permission set

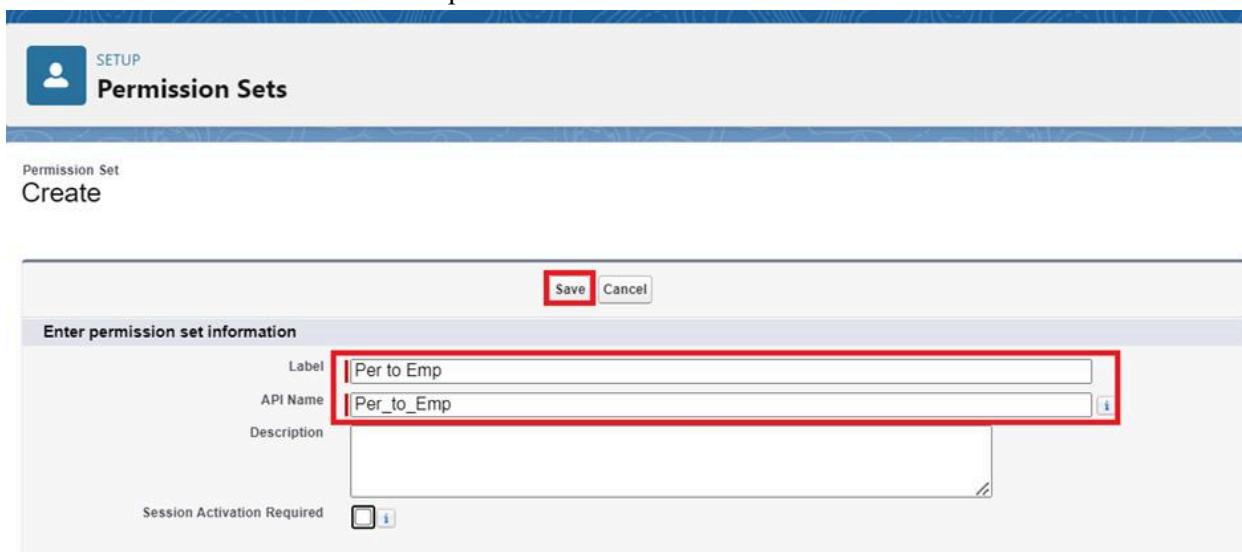
To Create a Permission Set:

1. Go to setup --> type “permission sets” in quick search --> select permission sets --> New



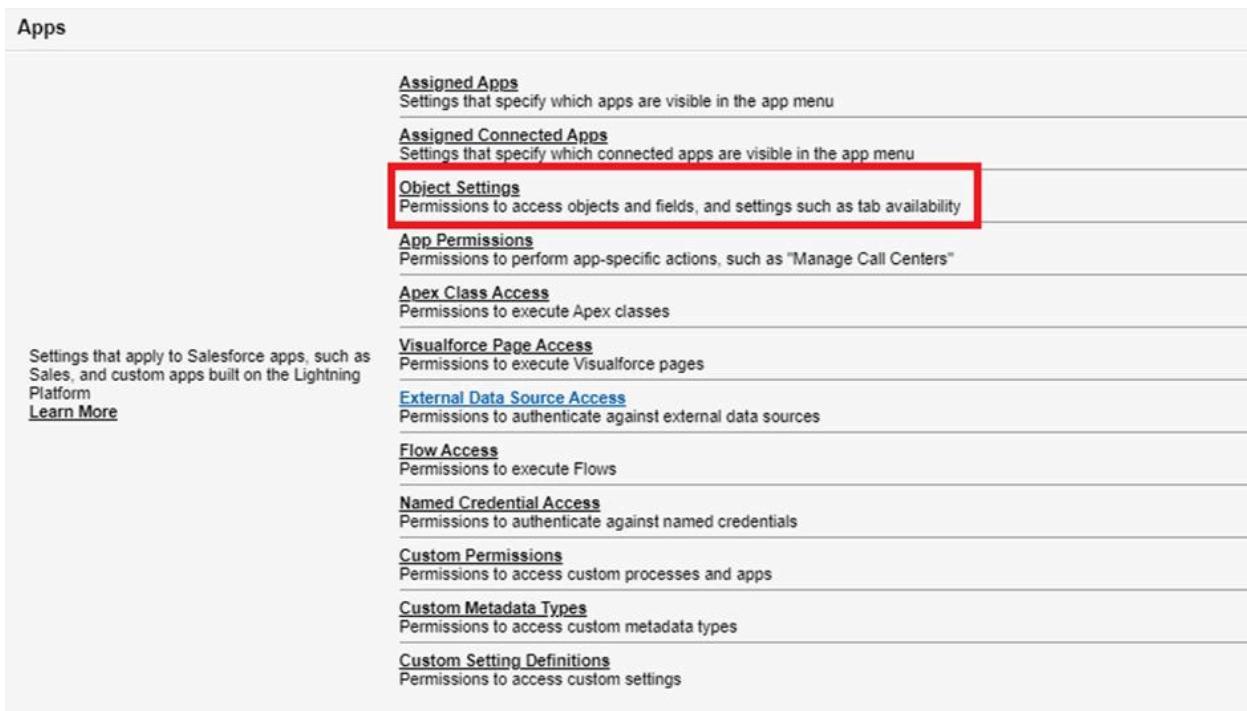
The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup' and 'Home' buttons, and a 'Search Setup' bar. The left sidebar has 'Permission sets' selected. The main content area is titled 'Permission Sets' and contains a table of existing permission sets. The 'New' button is highlighted with a red box. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. Examples of permission sets listed include 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', and 'Contact Center Agent'.

2. Enter the label name as “Per to Emp” --> Save



The screenshot shows the 'Create Permission Set' page. The top navigation bar includes 'SETUP' and 'Permission Sets' buttons. The main content area is titled 'Enter permission set information'. It has fields for 'Label' (containing 'Per to Emp'), 'API Name' (containing 'Per_to_Emp'), 'Description' (empty), and 'Session Activation Required' (checkbox). The 'Save' button is highlighted with a red box.

3. Under Apps Select object settings.



Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

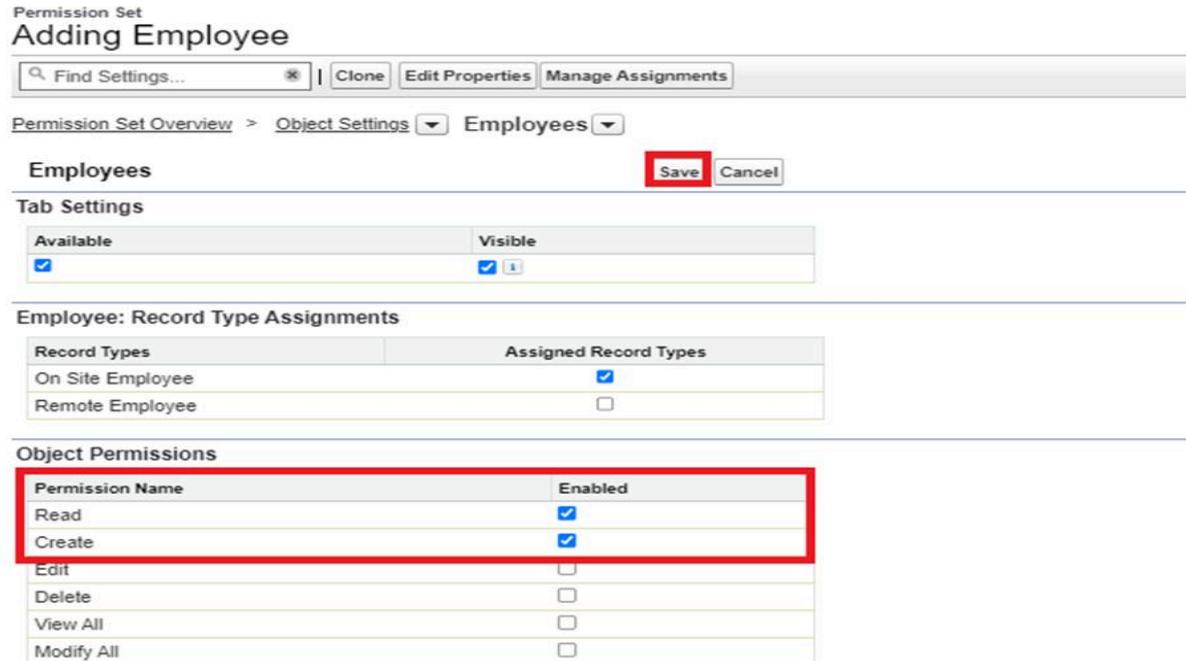
Named Credential Access
Permissions to authenticate against named credentials

Custom Permissions
Permissions to access custom processes and apps

Custom Metadata Types
Permissions to access custom metadata types

Custom Setting Definitions
Permissions to access custom settings

4. Click on Employee object --> click on Edit --> under object permission check for read and create.



Permission Set
Adding Employee

Find Settings... | Clone | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings Employees

Employees Save Cancel

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

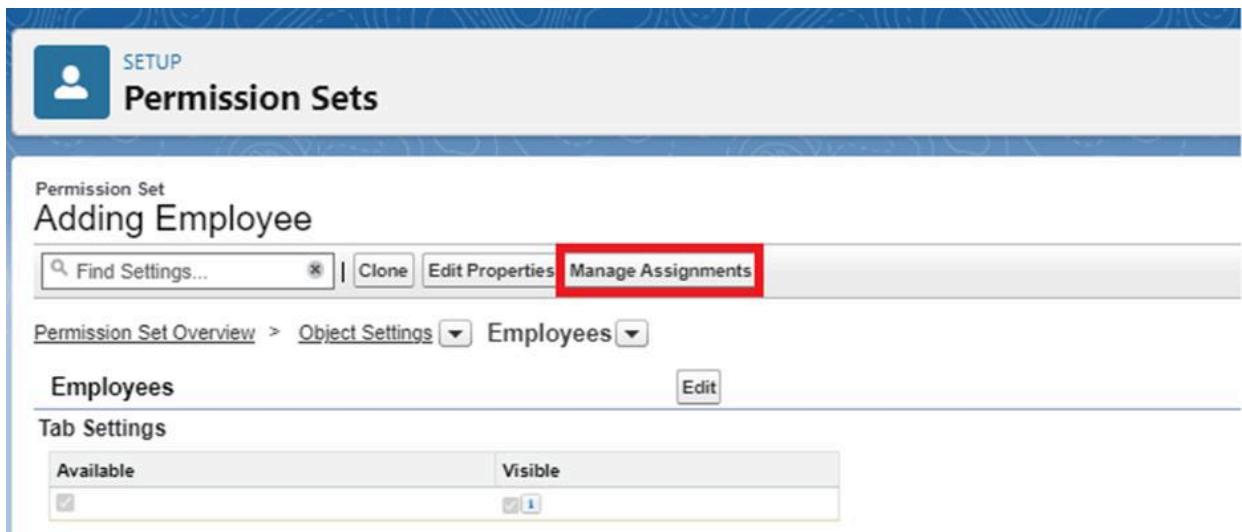
Employee: Record Type Assignments

Record Types	Assigned Record Types
On Site Employee	<input checked="" type="checkbox"/>
Remote Employee	<input type="checkbox"/>

Object Permissions

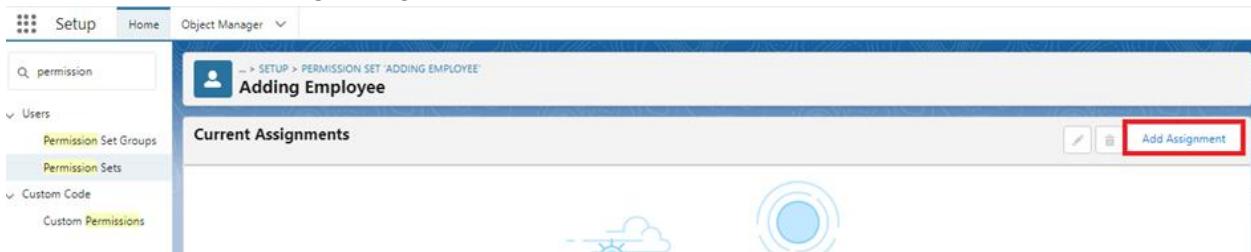
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

5. Click on Save.
6. After saving the permission click on the Manage assignment



The screenshot shows the Salesforce 'Permission Sets' page. At the top, there is a blue header bar with the word 'SETUP' and a user icon. Below the header, the page title is 'Permission Sets' with a sub-section 'Adding Employee'. A navigation bar below the title includes 'Find Settings...', 'Clone', 'Edit Properties', and a button 'Manage Assignments' which is highlighted with a red box. Below the navigation bar, the breadcrumb path is 'Permission Set Overview > Object Settings Employees'. The main content area is titled 'Employees' with an 'Edit' button. Under 'Tab Settings', there is a table with two columns: 'Available' and 'Visible'. The 'Available' column has a checked checkbox, and the 'Visible' column has an unchecked checkbox. At the bottom of the page, there is a footer bar with 'Setup', 'Home', and 'Object Manager' buttons.

7. Now click on the Manage Assignment.



The screenshot shows the 'Current Assignments' page for the 'Adding Employee' permission set. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows a tree structure with 'Users', 'Permission Set Groups', 'Permission Sets' (which is selected and highlighted in blue), and 'Custom Code'. The main content area is titled 'Adding Employee' and shows the 'Current Assignments' section. This section contains two icons: a cloud icon and a circular icon. At the top of the 'Current Assignments' section, there are three buttons: a pencil icon, a delete icon, and a 'Add Assignment' button, which is highlighted with a red box.

8. Click on Add Assignment

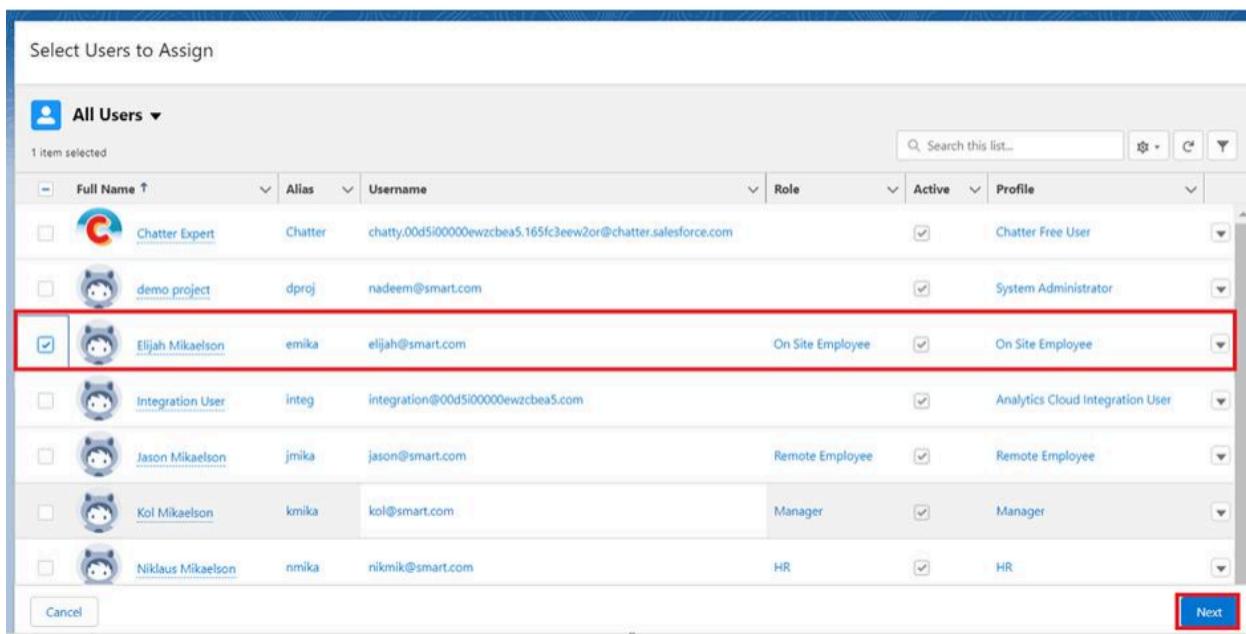
Select Users to Assign

All Users

1 item selected

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00d5i00000ewzcbea5.165fc3ee20r@chatter.salesforce.com	Chatter Free User	Active	Chatter Free User
demo project	dproj	nadeem@smart.com	System Administrator	Active	System Administrator
Elijah Mikaelson	emika	elijah@smart.com	On Site Employee	Active	On Site Employee
Integration User	integ	integration@00d5i00000ewzcbea5.com	Analytics Cloud Integration User	Active	Analytics Cloud Integration User
Jason Mikaelson	jmika	jason@smart.com	Remote Employee	Active	Remote Employee
Kol Mikaelson	kmika	kol@smart.com	Manager	Active	Manager
Niklaus Mikaelson	nmika	nikmik@smart.com	HR	Active	HR

Cancel Next



9. Now select the users(any one user with the profile “On Site Employee”) and click on Next.

10. Click on Assign

11. Click on Done.

15. Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

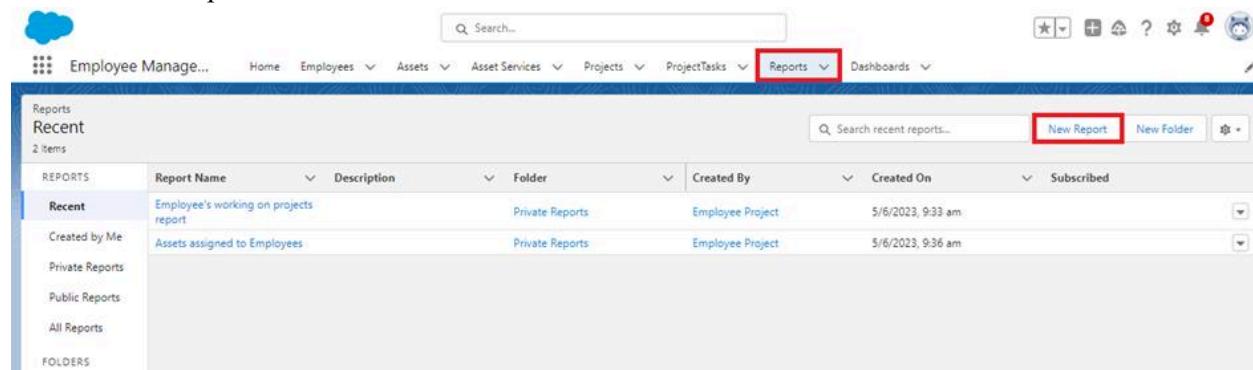
Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

Create Report

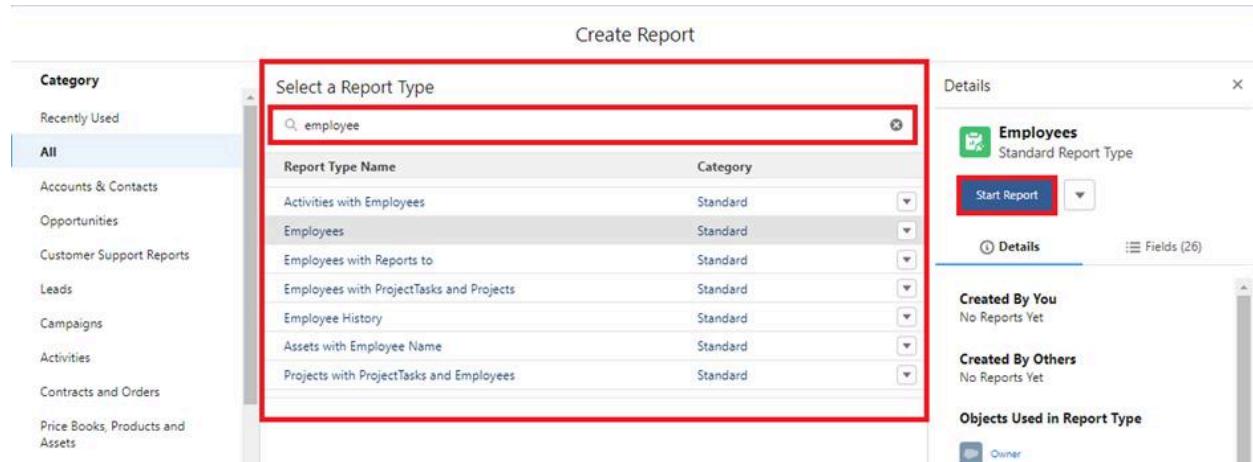
To Create a Report:

1. Go to the app --> click on the reports tab
2. Click New Report.



The screenshot shows the Salesforce interface with the 'Employee Manage...' app selected. The top navigation bar includes 'Home', 'Employees', 'Assets', 'Asset Services', 'Projects', 'ProjectTasks', 'Reports' (which is highlighted with a red box), and 'Dashboards'. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled 'Reports' and shows a table of 'Recent' reports. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. There are buttons for 'New Report' (highlighted with a red box) and 'New Folder'. On the left, there's a sidebar with categories like 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. At the bottom, there's a 'FOLDERS' section.

3. Select report type from category or from report type panel or from search panel --> click on start report.



The screenshot shows the 'Create Report' dialog box. On the left, there's a sidebar with a 'Category' section containing 'Recently Used' and a list of objects: 'All', 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', 'Campaigns', 'Activities', 'Contracts and Orders', and 'Price Books, Products and Assets'. The main area is titled 'Select a Report Type' and contains a search bar with 'employee' typed in. Below the search bar is a table with columns 'Report Type Name' and 'Category'. The table lists several report types: 'Activities with Employees' (Standard), 'Employees' (Standard, highlighted with a red box), 'Employees with Reports to' (Standard), 'Employees with ProjectTasks and Projects' (Standard), 'Employee History' (Standard), 'Assets with Employee Name' (Standard), and 'Projects with ProjectTasks and Employees' (Standard). To the right of the table is a 'Details' panel for the selected 'Employees' report type. It shows the report is a 'Standard Report Type' and has a 'Start Report' button (highlighted with a red box). Below the button are sections for 'Created By You' (No Reports Yet) and 'Created By Others' (No Reports Yet). At the bottom, there's a section for 'Objects Used in Report Type' with a 'Owner' icon.

4. Customize your report

--> Add fields from left pane as shown below

5. Save or run it.

Note: Reports may get varied from the above pictures as the data might be different

Create 2 more Report

1. Create a report with report type: “Employees with ProjectTasks and Projects”.
 2. Create a report with report type: “Employees with Assets”.

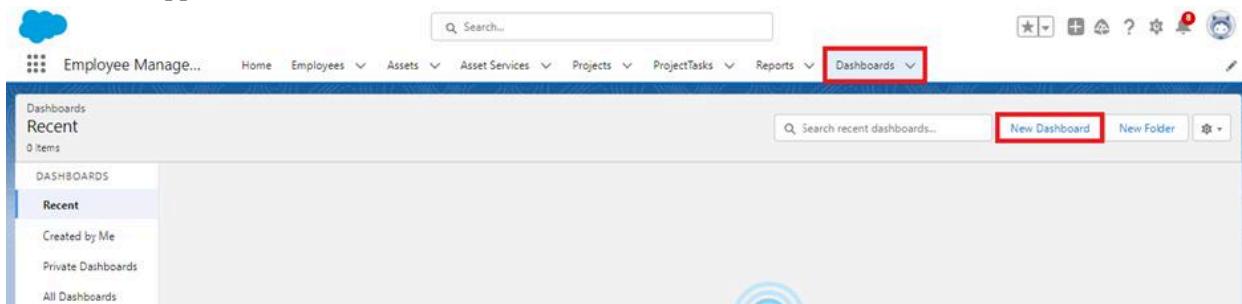
16.Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities.

Before building, reading, and sharing dashboards, review these dashboard basics.

To Create a Dashboard

1. Go to the app --> click on the Dashboards tabs.



2. Give a Name and click on Create.

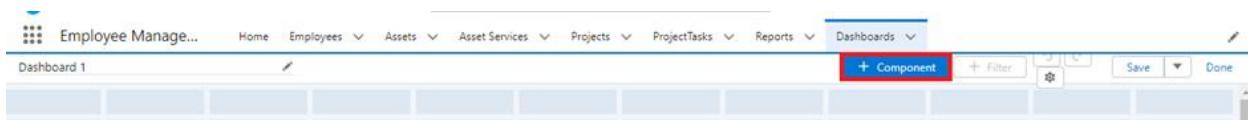
New Dashboard

* Name
Dashboard 1

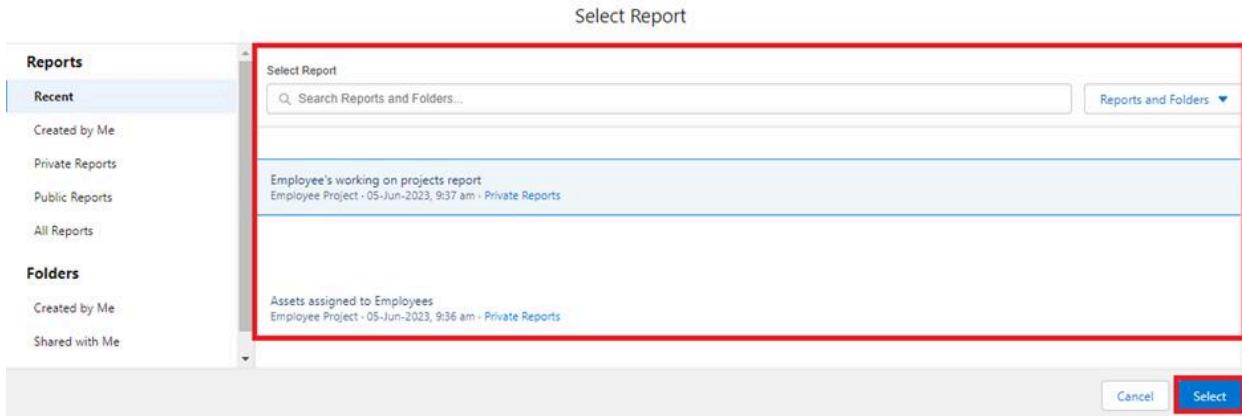
Description

Folder
Private Dashboards

3. Select add component



4. Select a Report and click on select.



5. Click Add then click on Save and then click on Done.

Create another Dashboard as above.