



S.K.P ENGINEERING COLLEGE

College in thiruvannamalai, Tamil Nadu
606611.

DEPARTMENT OF COMPUTER SCIENCE AND ENGINEERING

BACHELOR OF ENGINEERING

2024 - 2025

Workforce Administration Solution (Dev)

TEAM MEMBERS:

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Certified that this is a bonafide record of work done by

NAME :ASHA.K ,ASHWIN.S, ASHWINI.M, AVINASH.A

NM ID :

UNIVERSITY REG.NO :

SEMESTER /YEAR :5/3

BRANCH :CSE

YEAR : 2024-2025

Staff-in-Charge Head of the Department

Submitted for the _____

Practical Examination held on _____

**Internal
Examiner**

**External
Examiner**

WORKFORCE ADMINISTRATION SOLUTION(DEV)

Project Description:

Workforce Administration Solution is a software application or platform designed to streamline and automate various aspects of employee's working on projects and Asset Assignment processes within an organization. It serves as a centralized system for managing employee data, number of projects an employee is working on, tracking employee performance, and keeping record for the assets which they are assigned to.

1. Real Time Salesforce Project
2. Data Modelling
3. Creating an Application
4. User Interface Customization
5. Importing bulk amounts of data
6. Security in Salesforce
7. Group Collaboration
8. Reports & Dashboards

MILESTONE 1-SALESFORCE

Introduction:

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

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

What Is Salesforce?

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

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

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

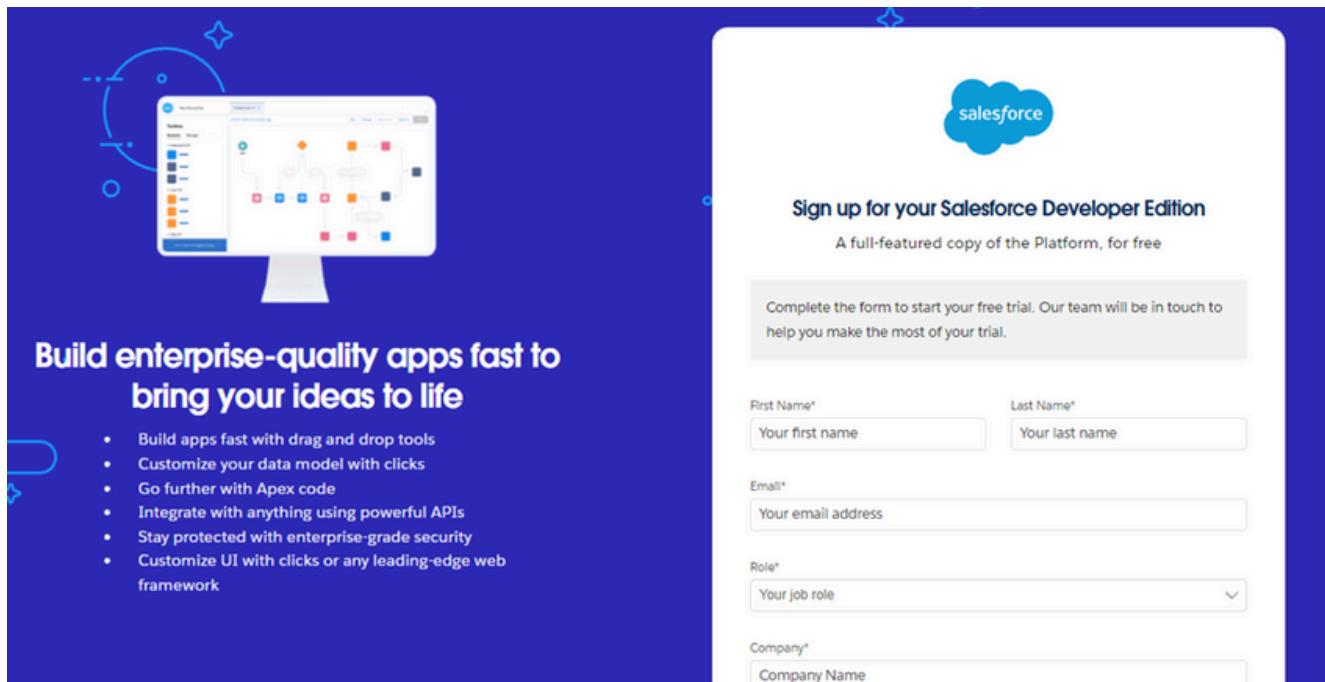
<https://youtu.be/r9EX3lGde5k>

Activity 1: Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>

2. On the sign up form, enter the following details :

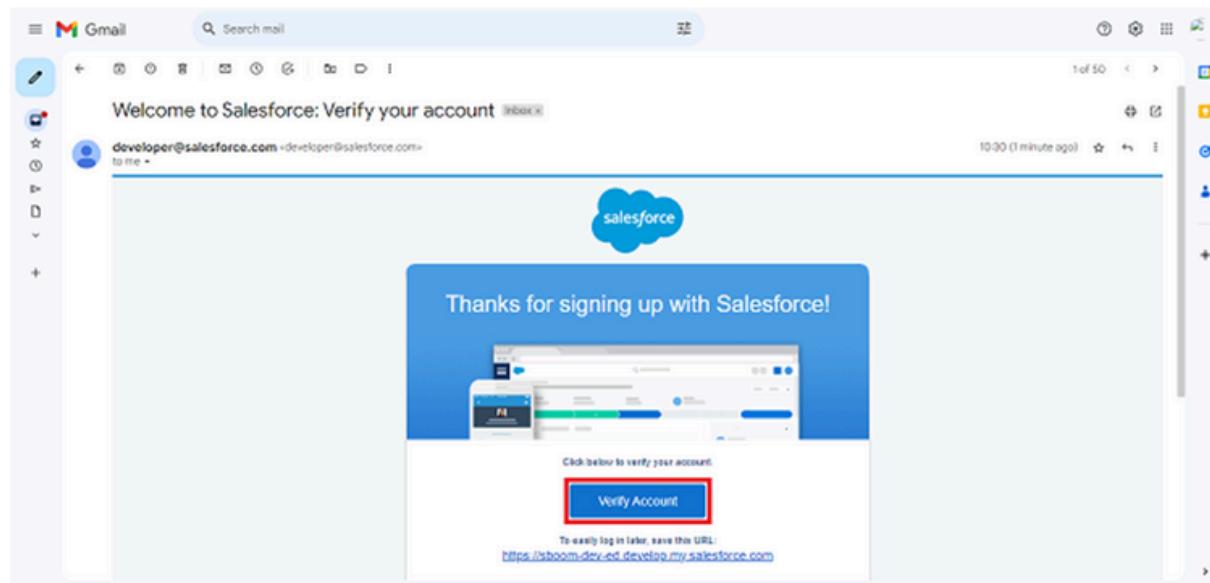


- 1) First name & Last name
- 2) Email
- 3) Role : Developer
- 4) Company : College Name
- 5) County : India
- 6) Postal Code : pin code
- 7) Username : should be a combination of your name and company
- 8) Click on Sign me up.

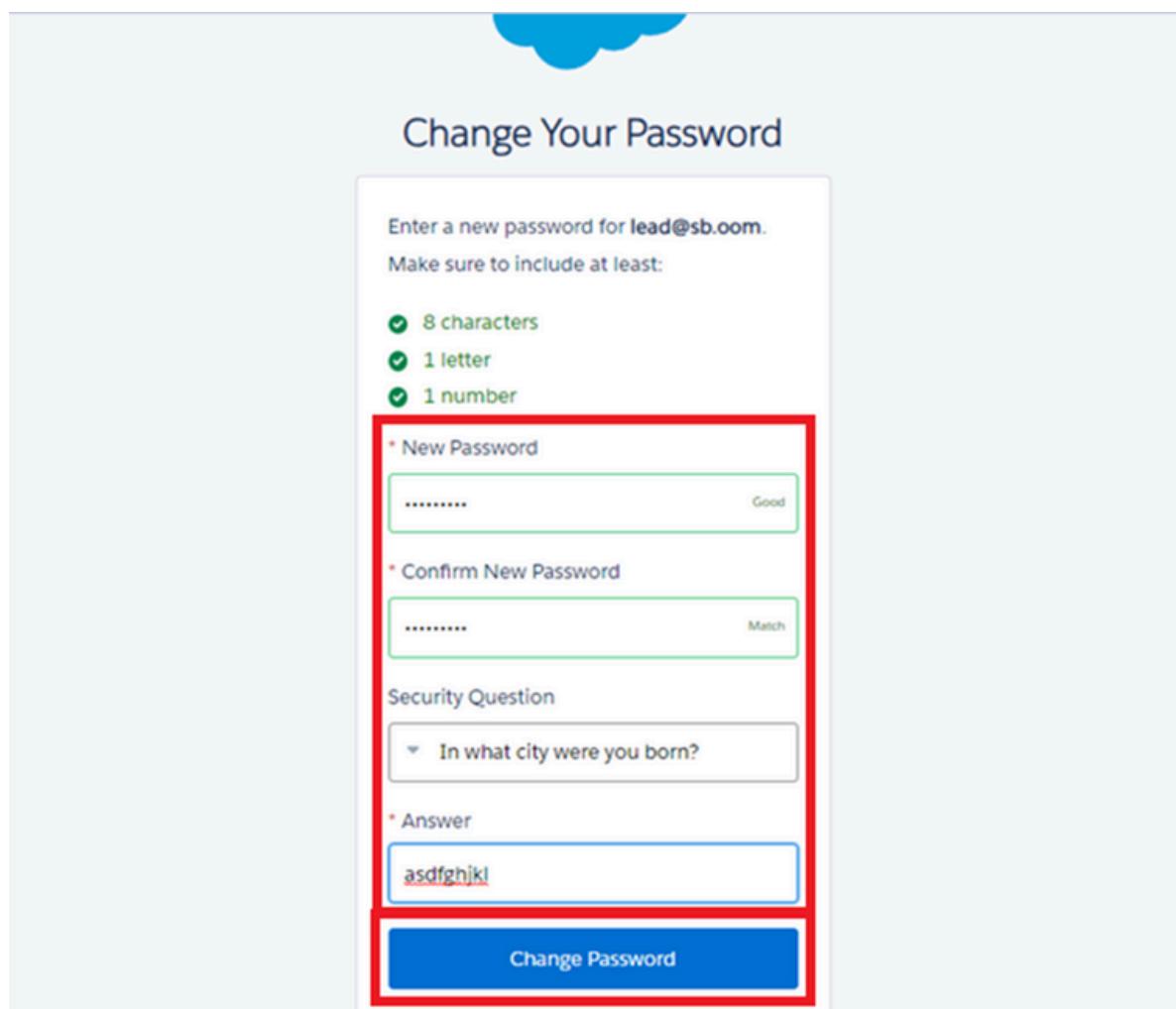
This need not be an actual email id, you can give anything in the format : username@organization.com
Click on sign me up after filling these.

Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.



Change Your Password

Enter a new password for lead@sb.oom.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

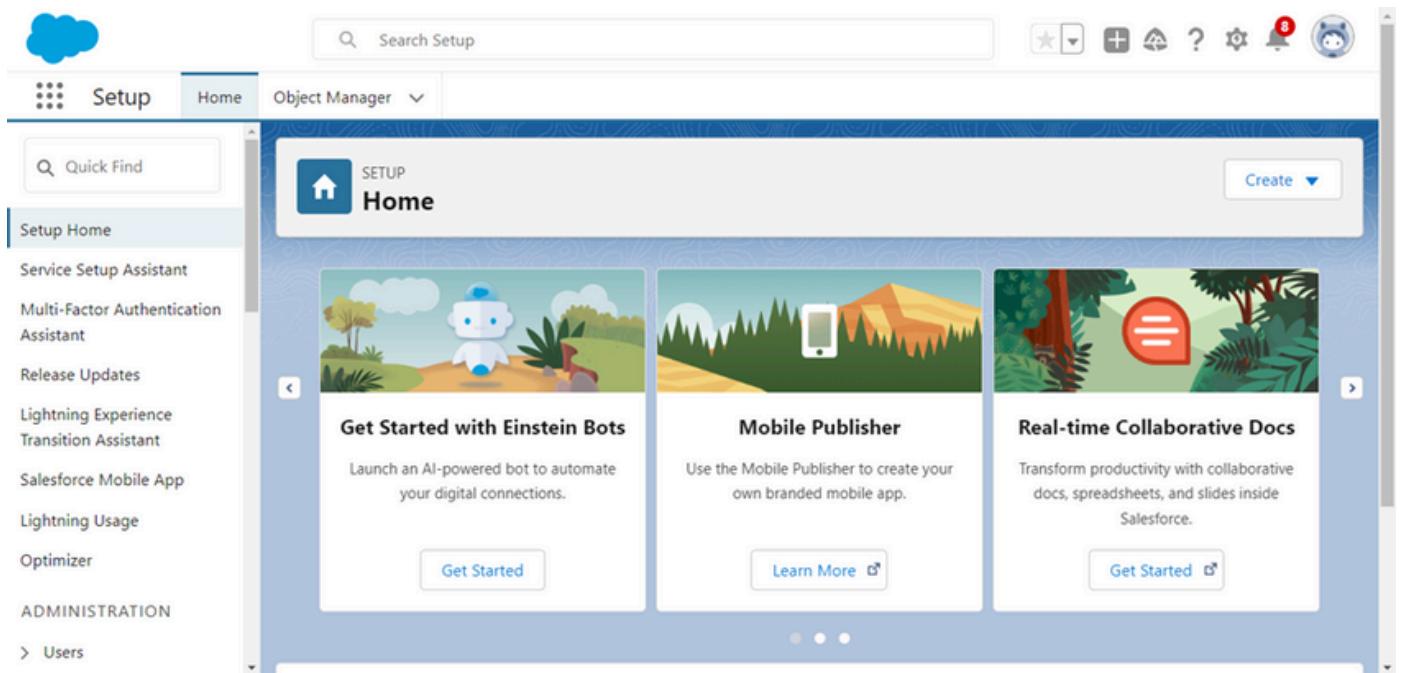
* Confirm New Password
..... Match

Security Question
▼ In what city were you born?

* Answer
asdfghjkl

Change Password

4. Then you will redirect to your salesforce setup page.



The screenshot shows the Salesforce Setup Home page. The left sidebar includes links for Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration. The main content area features three cards: "Get Started with Einstein Bots" (Launch an AI-powered bot to automate your digital connections), "Mobile Publisher" (Use the Mobile Publisher to create your own branded mobile app), and "Real-time Collaborative Docs" (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). A "Create" button is located in the top right corner of the main content area.

Object

What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

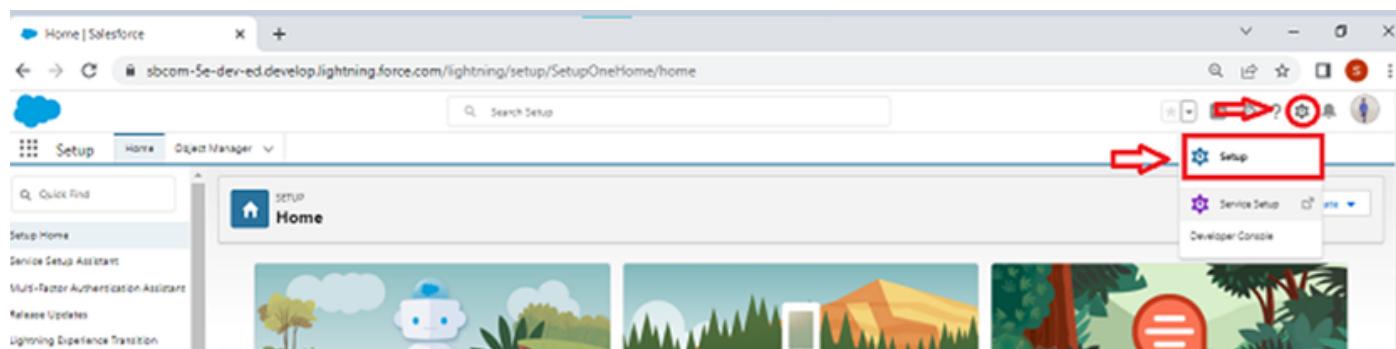
Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

To Navigate to Setup page:

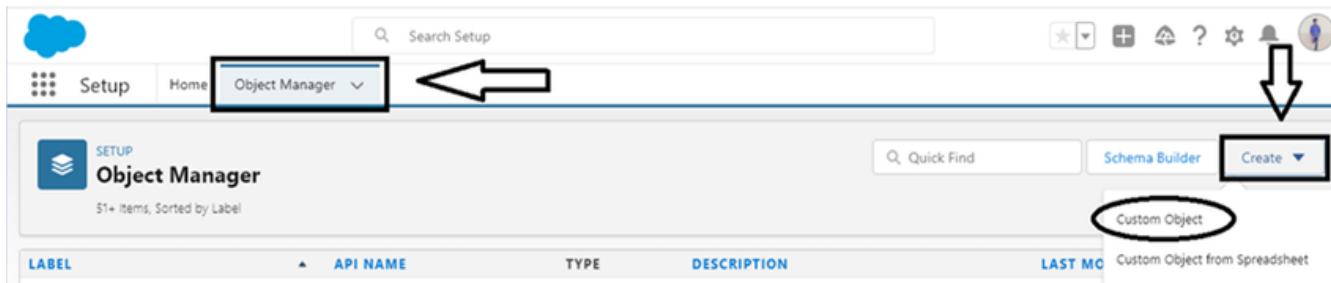
Click on gear icon --> click setup.



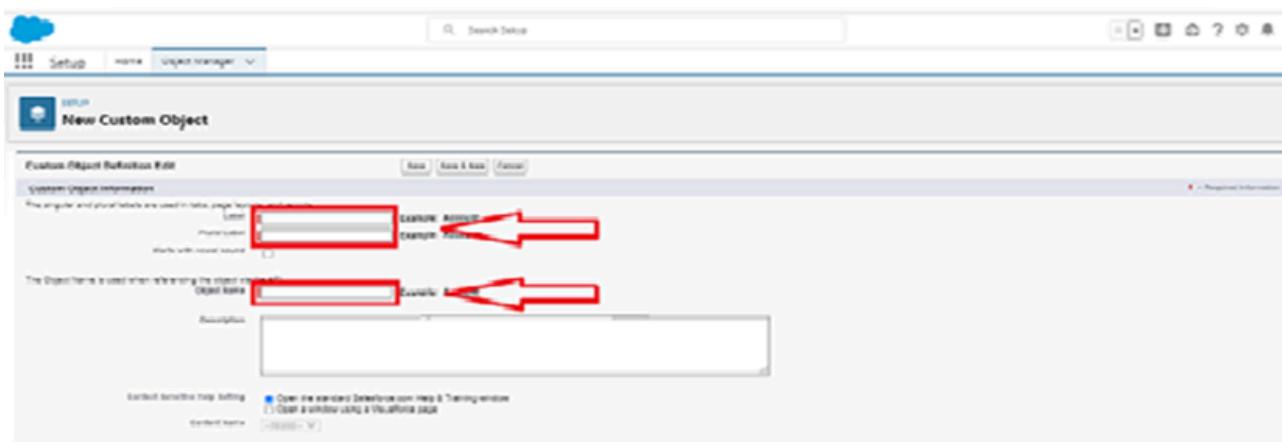
Activity 1: Create Employee Object

To create an object:

1. From the setup page --> Click on Object Manager --> Click on Create --> Click on Custom Object.



- 1) Enter the label name: Employee
- 2) Plural label name: Employees



- 3) Enter Record Name Label and Format

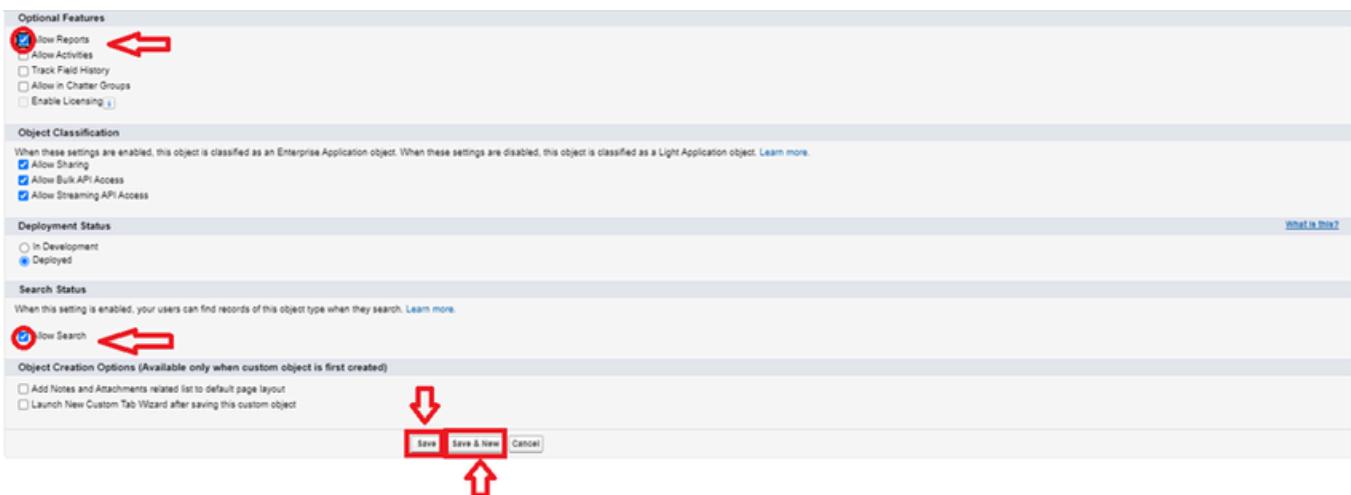
- 1 Record Name : Employee ID
- 2 Data Type : Auto Number
- 3 Display Format : EMS-{0000}
- 4 Starting Number : 1

Enter Record Name Label and Format

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

Record Name <input type="text" value="Employee Id"/>	Example: Account Name
Data Type <input type="button" value="Auto Number"/>	
Display Format <input type="text" value="EMS-{0000}"/>	Example: A-{0000} What Is This?
Starting Number <input type="text" value="1"/>	

1. Click on Allow reports,
2. Allow search --> Save.



This screenshot shows the 'Object Creation Options' section of a custom object setup page. It includes fields for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'. At the bottom, there are three buttons: 'Save', 'Save & New', and 'Cancel'. Red arrows point from the text descriptions above to the 'Allow Reports' checkbox in the 'Optional Features' section and the 'Allow Search' checkbox in the 'Search Status' section.

Activity 2: Create Project Object

The purpose of creating a project object is to have detailed information about the on-going and completed projects in the organization.

To create an object:

1. From the setup page --> Click on Object Manager --> Click on Create --> Click on Custom Object.

- 1) Enter the label name--> Project
- 2) Plural label name--> Projects

3) Enter Record Name Label and Format

- 1 Record Name : Project ID
- 2 Data Type : Auto Number
- 3 Display Format : Proj-{0000}
- 4 Starting Number : 1

2. Click on Allow reports,
3. Allow search --> Save

Activity 3: Create 3 more objects with label names as ProjectTask, Asset, Asset Service.

Note: use “Text” as a data type and label Record Name as “Project Task Name”.

Tabs

What is Tab:

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types of Tabs:

1. Custom Tabs

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Web Tabs

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

3. Visualforce Tabs

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

4. Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

5. Lightning Page Tabs

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning

Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Activity 1: Creating a Custom Tab (Employee)

To create a Tab:(Employee)

Go to setup page --> type Tabs in Quick Find bar --> click on tabs --> New (under custom object tab)

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external content. Lightning Component tabs allow you to add Lightning components to the navigation bar. You can also allow users to add Lightning Pages to Lightning Experience and the mobile app.



The screenshot shows the Salesforce Setup interface with two main sections: 'Custom Object Tabs' and 'Web Tabs'. Both sections have a heading, a message indicating no tabs have been defined, and a 'New' button. The 'New' button in the 'Custom Object Tabs' section is highlighted with a red box.

Custom Object Tabs	New	What Is This?
No Custom Object Tabs have been defined		

Web Tabs	New	What Is This?
No Web Tabs have been defined		

Select Object(Employee) --> Select any tab style --> Next (Add to profiles page) keep it as default --> Next (Add to Custom App) keep it default --> Save.



Activity 2: Creating a Custom Tab (Project)

1. Go to setup page --> type Tabs in Quick Find bar --> click on tabs --> New (under custom object tab)
2. Select Object(Project) --> Select the tab style ?--> Next (Add to profiles page) keep it as default --> Next (Add to Custom App) keep it as default --> Save.

Activity 3: Creating tabs for remaining objects

Now create tabs for Project Task, Asset, Asset Service objects.

The Lightning App

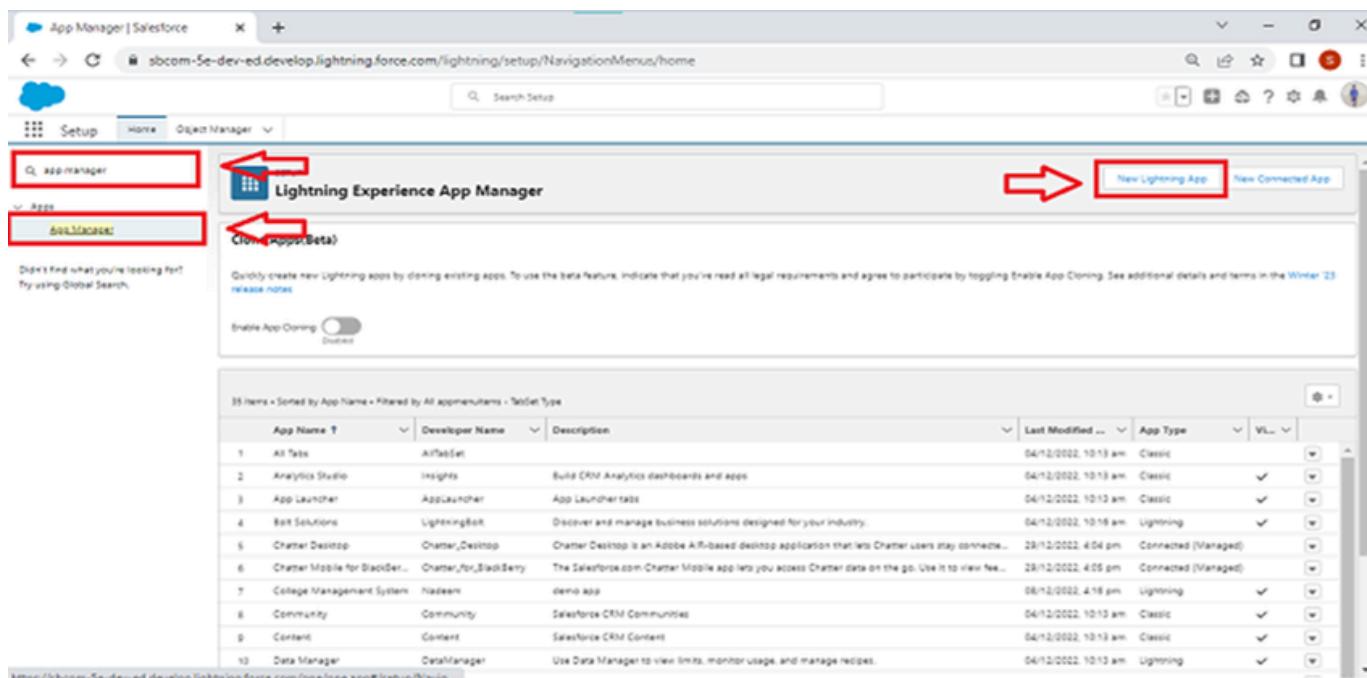
The Lightning App

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.

Activity 1: 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 several tabs: 'Setup', 'Home', 'Object Manager', and 'App Manager'. The 'App Manager' tab is selected and highlighted with a red box. Below the tabs, there is a search bar labeled 'Search Setup'. On the left side, there are two sections: 'My Apps' and 'Available'. The 'Available' section is highlighted with a red box and contains a link 'Clone (AppExchange Beta)'. To the right of these sections is a large button labeled 'New Lightning App' with a red arrow pointing to it. The main content area displays a table titled '35 Items > Sorted by App Name > Filtered by All appmenuitems - TabSet Type'. The table has columns for 'App Name', 'Developer Name', 'Description', 'Last Modified', 'App Type', and 'V...'. The table lists various apps like 'All Tabs', 'Analytics Studio', 'App Launcher', etc., with their respective details.

App Name	Developer Name	Description	Last Modified	App Type	V...
1 All Tabs	Apptabset	Build CRM, Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	
2 Analytics Studio	Insights	Build CRM, Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	
3 App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic	
4 Built Solutions	LightningBolt	Discover and manage business solutions designed for your industry	04/12/2022, 10:18 am	Lightning	
5 Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected...	29/12/2022, 4:04 pm	Connected (Managed)	
6 Chatter Mobile for BlackBerry	Chatter/for BlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed...	29/12/2022, 4:05 pm	Connected (Managed)	
7 College Management System	Natasni	demo app	08/12/2022, 4:18 pm	Lightning	
8 Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic	
9 Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes	04/12/2022, 10:13 am	Lightning	

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.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name 

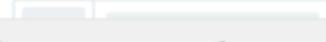
*Developer Name

Description

App Branding

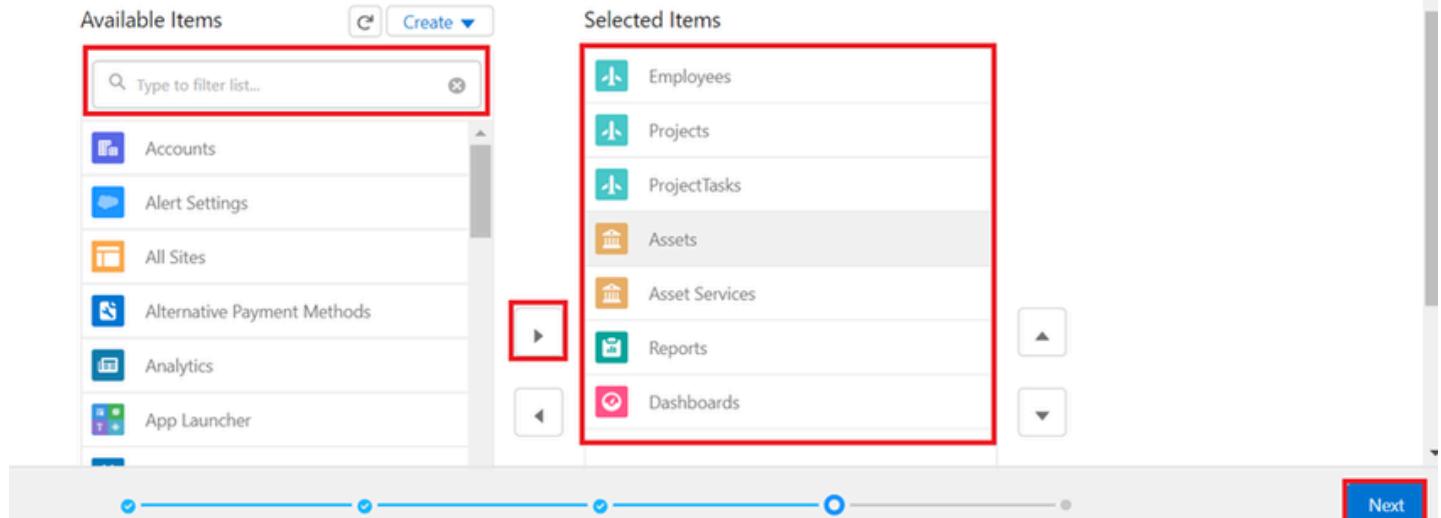
Image Primary Color Hex Value 

Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview 



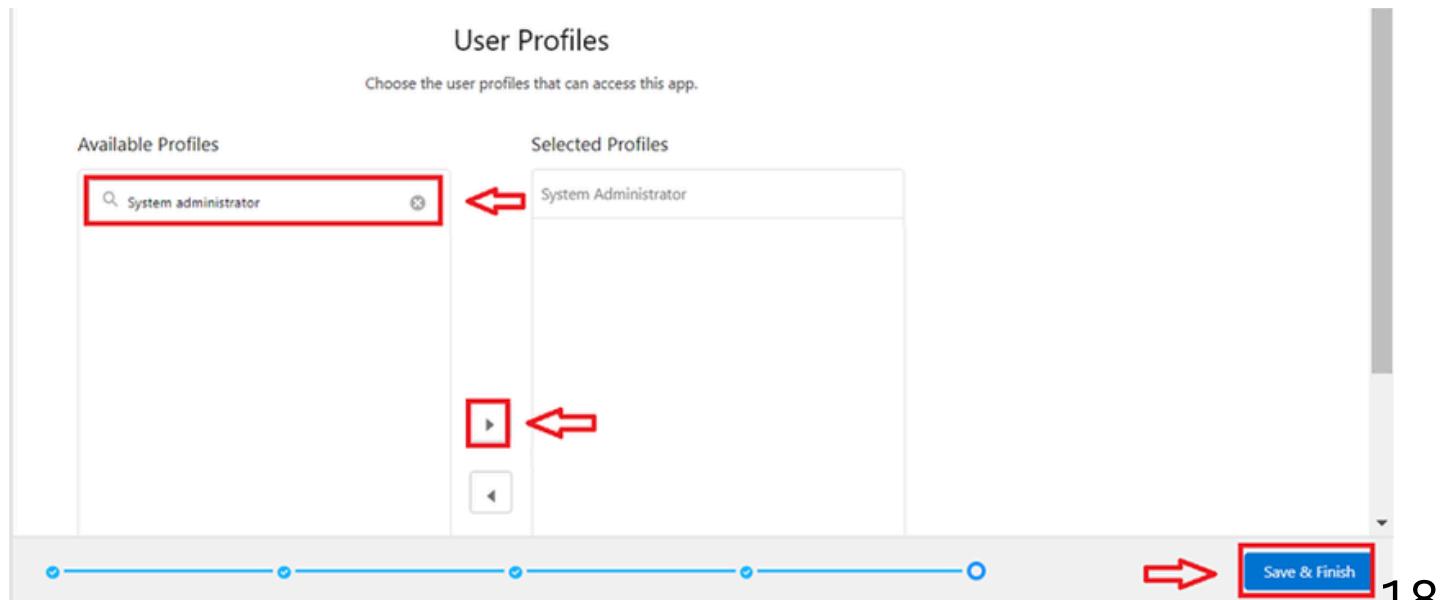
4. To Add Navigation Items:



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:



Search profiles (System administrator) in the search bar --> click on the arrow button --> save & finish.

Fields & Relationships

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

Types of Fields

1. Standard Fields
2. Custom Fields

Activity 1 : Creating Text Field in Employee Object

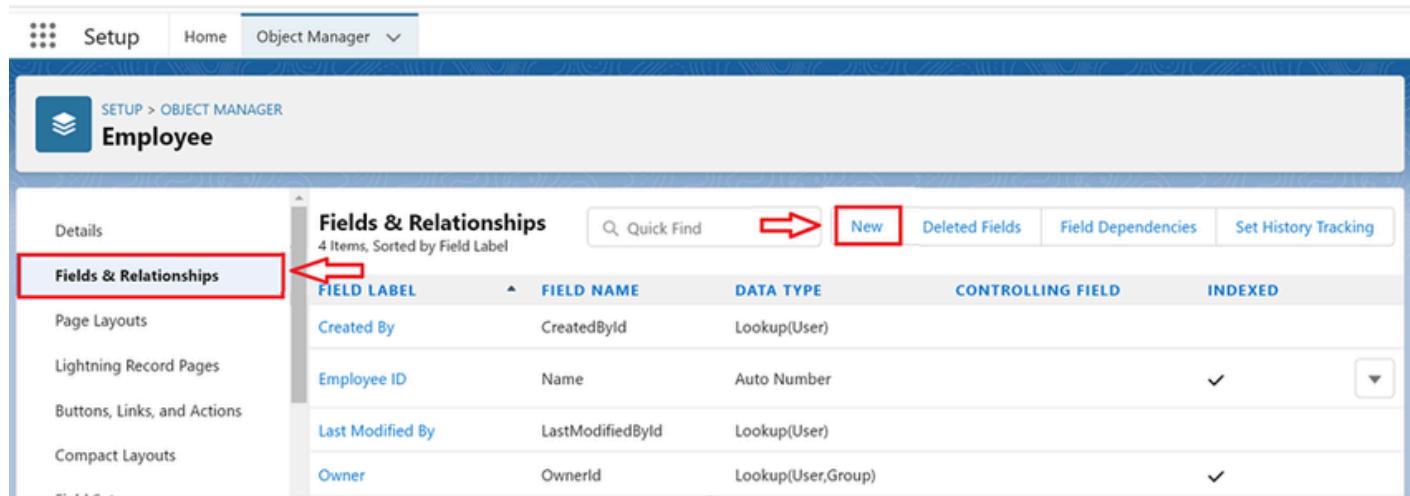
To create fields in an object:

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



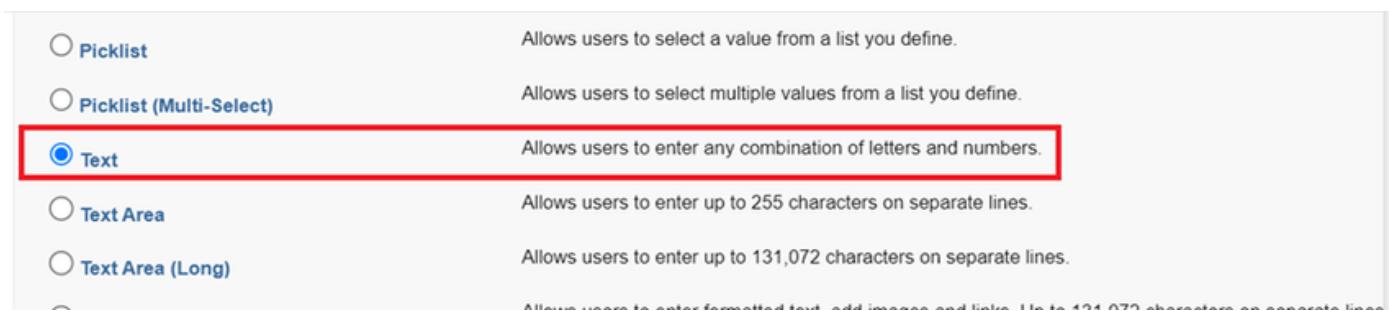
The screenshot shows the Salesforce Object Manager page. At the top, there is a navigation bar with a cloud icon, 'Setup', 'Home', and a highlighted 'Object Manager' button with a red arrow pointing to it. Below the navigation is a search bar containing the text 'Employee' with a red arrow pointing to it. The main area is titled 'Object Manager' and shows a table with one item. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The single row shows 'Employee' in the LABEL column, 'Employee_c' in the API NAME column, 'Custom Object' in the TYPE column, and '1 Items, Sorted by Label' in the DESCRIPTION column. The LAST MODIFIED date is '20/06/2023' and the DEPLOYED status is checked.

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



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

3. Select Data type as “Text”.



<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input checked="" type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.

4. Click on Next

Employee
New Custom FieldHelp for this Page 

Step 2. Enter the details Step 2 of 4

Field Label 

Length 

Please enter the maximum length for a text field below.

Field Name 

Description

Previous  

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.

Activity 2 : 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 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.

Activity 3 : 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

Previous **Next** 

Field Label Age 	Field Name Age 
Auto add to custom report type <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity 	
Formula Return Type	
<input type="radio"/> None Selected Select one of the data types below.	
<input type="radio"/> Checkbox Calculate a boolean value <small>Example: <code>TODAY() > CloseDate</code></small>	
<input type="radio"/> Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount. <small>Example: <code>Gross Margin = Amount - Cost_c</code></small>	
<input type="radio"/> Date Calculate a date, for example, by adding or subtracting days to other dates. <small>Example: <code>Reminder Date = CloseDate - 7</code></small>	
<input type="radio"/> Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time. <small>Example: <code>Next = NOW() + 1</code></small>	
<input checked="" type="radio"/> Number Calculate a numeric value. <small>Example: <code>Fahrenheit = 1.8 * Celsius_c + 32</code></small> 	

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](#) [Next](#) [Cancel](#)

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

[Insert Field](#) [Insert Operator](#)

Functions

-- All Function Categories --

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

[Insert Selected Function](#)

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

Description

Activity 4 : 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” and enter values as shown below.

Step 2. Enter the details Step 2 of 4

Field Label [i]

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 [i]
 Restrict picklist to the values defined in the value set [i]

Field Name [i]

Description

Help Text

Previous Next Cancel

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

Activity 5 : 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 [i]

Step 2. Choose the related object Step 2

Select the other object to which this object is related.

Related To [i]

Previous Next Cancel

4. Give Field Label as “Reports to” and click Next.
5. Next --> Next --> Save & New.

Activity 6 :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 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.

Activity 7 : Creating Remaining Fields in Employee Object

Now create the remaining fields using the data types mentioned in the table.

Setting OWD :

Setting OWD :

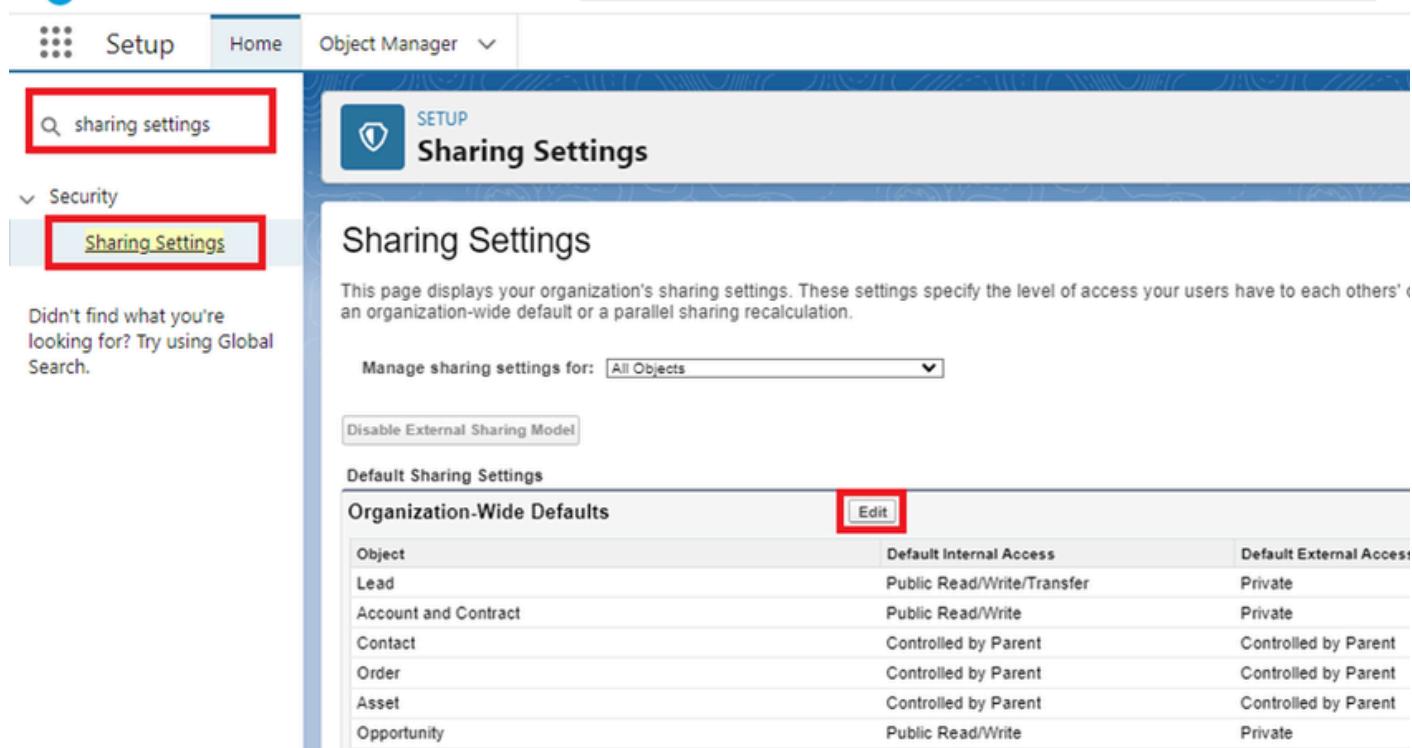
Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, 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

Activity 1: 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.



sharing settings

Sharing Settings

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' objects.

Manage sharing settings for: All Objects

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

Search for the Employee object.

- 3.Under default internal access and default external access change the options to “Private” and under grant using hierarchies select check box.
- 4.Click on save.



Object	Object Default	Field Level Security	Sharing
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 checked="" 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.

Activity - 2

Set OWD as Private for Project and Asset Service objects.

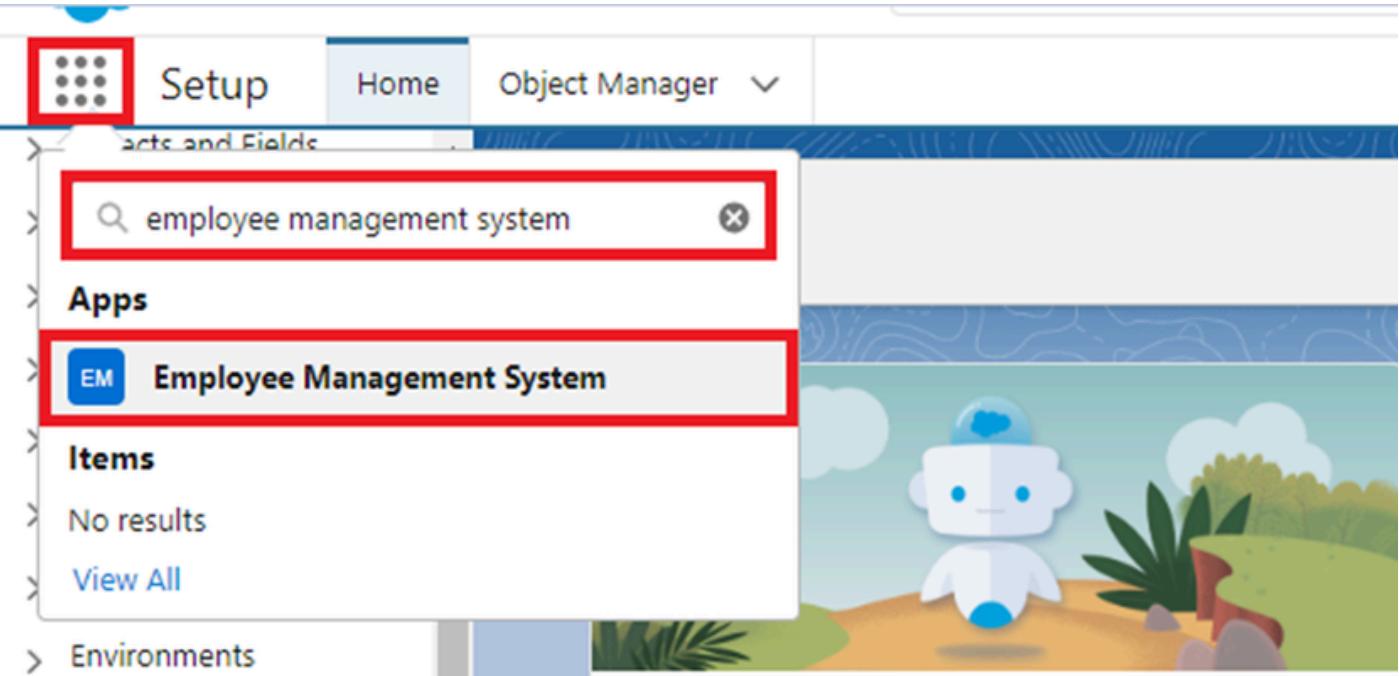
Use Case:

As a new Administrator, you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more. In this unit, you will learn about users and how you add users to your Salesforce org.

Activity 1: Create a Record (Employee)

1. Click on App Launcher on the left side of the screen.

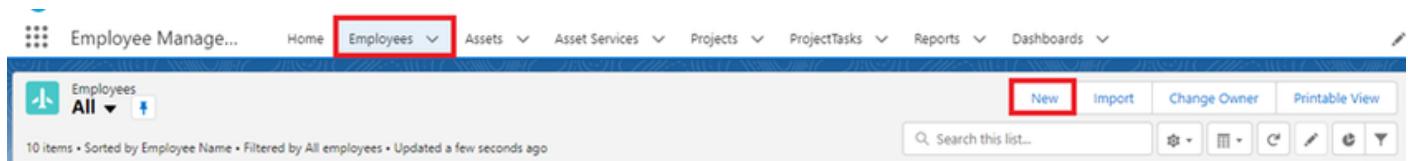
2. Search Employee Management System & click on it.



The screenshot shows the Salesforce search interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below the navigation bar is a search bar containing the text 'employee management system'. A red box highlights the search bar and the search results below it. The search results list includes 'Apps', 'Items', and 'Environments'. Under 'Apps', the 'Employee Management System' app is listed with its icon (blue square with 'EM') and name. This item is also highlighted with a red box. To the right of the search results, there is a decorative illustration of a white robot-like character standing in a green landscape with trees and clouds.

3. Click on the Employee tab.

4. Click New.



The screenshot shows the 'Employees' list view in the Employee Management System. The top navigation bar includes 'Home', 'Employees', 'Assets', 'Asset Services', 'Projects', 'ProjectTasks', 'Reports', and 'Dashboards'. The 'Employees' tab is active and highlighted with a red box. Below the navigation bar, there is a toolbar with buttons for 'New', 'Import', 'Change Owner', and 'Printable View'. The main area displays a table with 10 items, sorted by Employee Name and filtered by All employees. A message at the bottom indicates the list was updated a few seconds ago. The 'New' button in the toolbar is also highlighted with a red box.

5. Fill the Details and click on Save.

Activity 2: 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

Activity 3: 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.

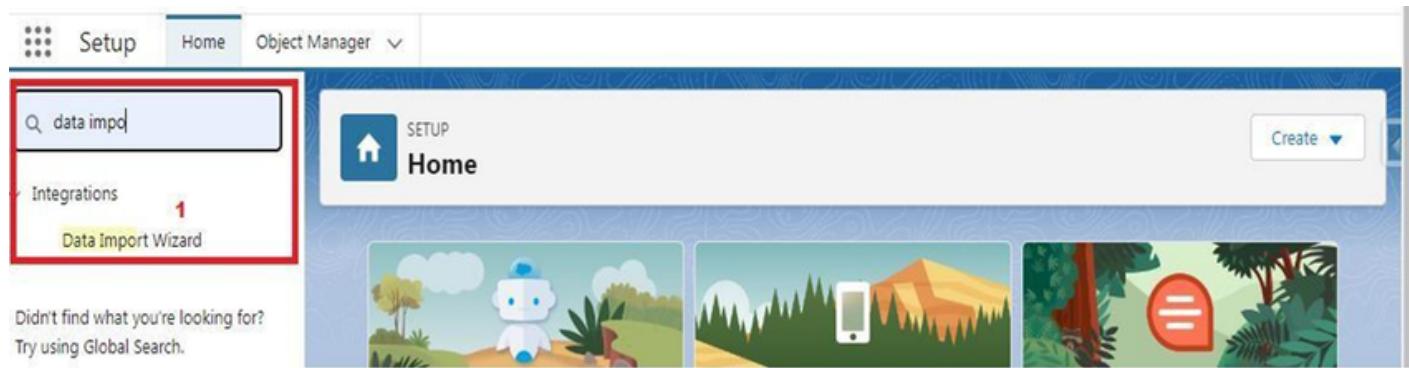
Import Data

NOTE- Before creating the application download this file from the URL given below
save the file in CSV.

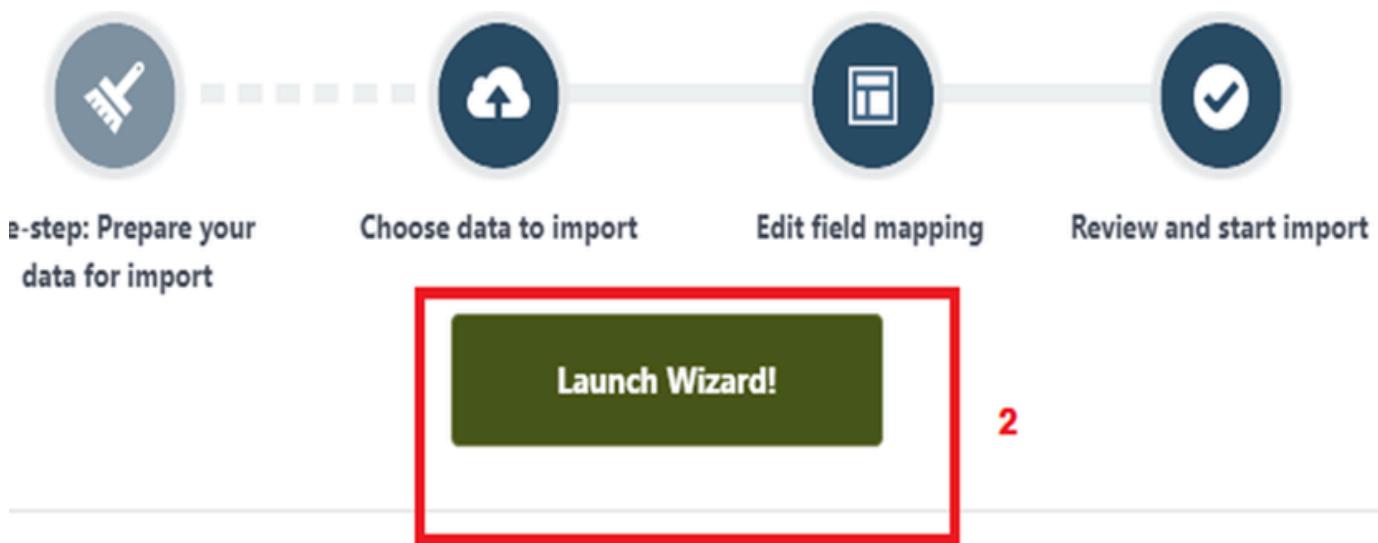
<https://tinyurl.com/SF-Employee-Data>

Activity-1: Importing data using Data Wizard

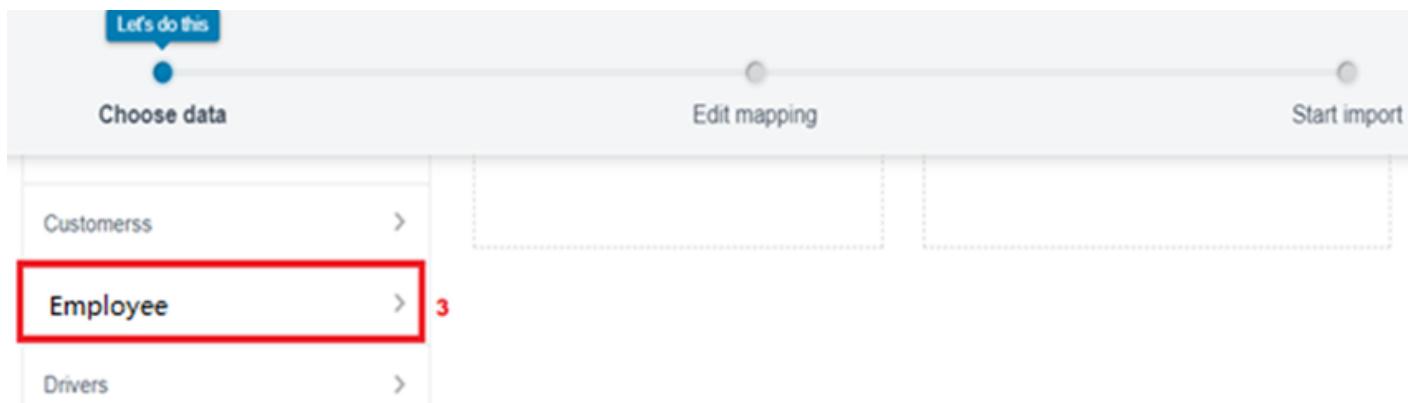
- 1 . From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



- 3 .Click Launch Wizard!



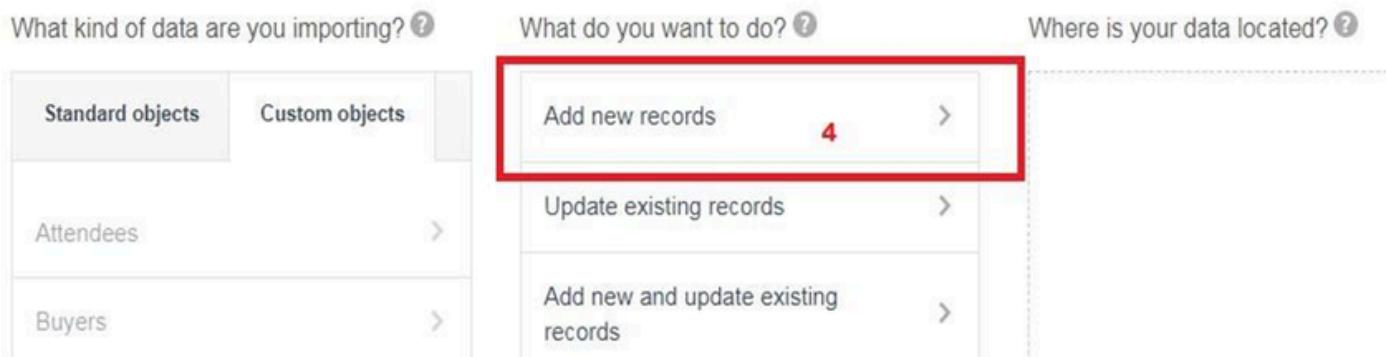
4 .Click the Custom Objects tab and select the Employee object.



5 .Select Add new records.

Import your Data into Salesforce

You can import up to 50,000 records at a time.



What kind of data are you importing?  Standard objects Custom objects 

What do you want to do?  Add new records  4
Update existing records 
Add new and update existing records 

Where is your data located? 

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

Choose data Edit mapping Start import

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       

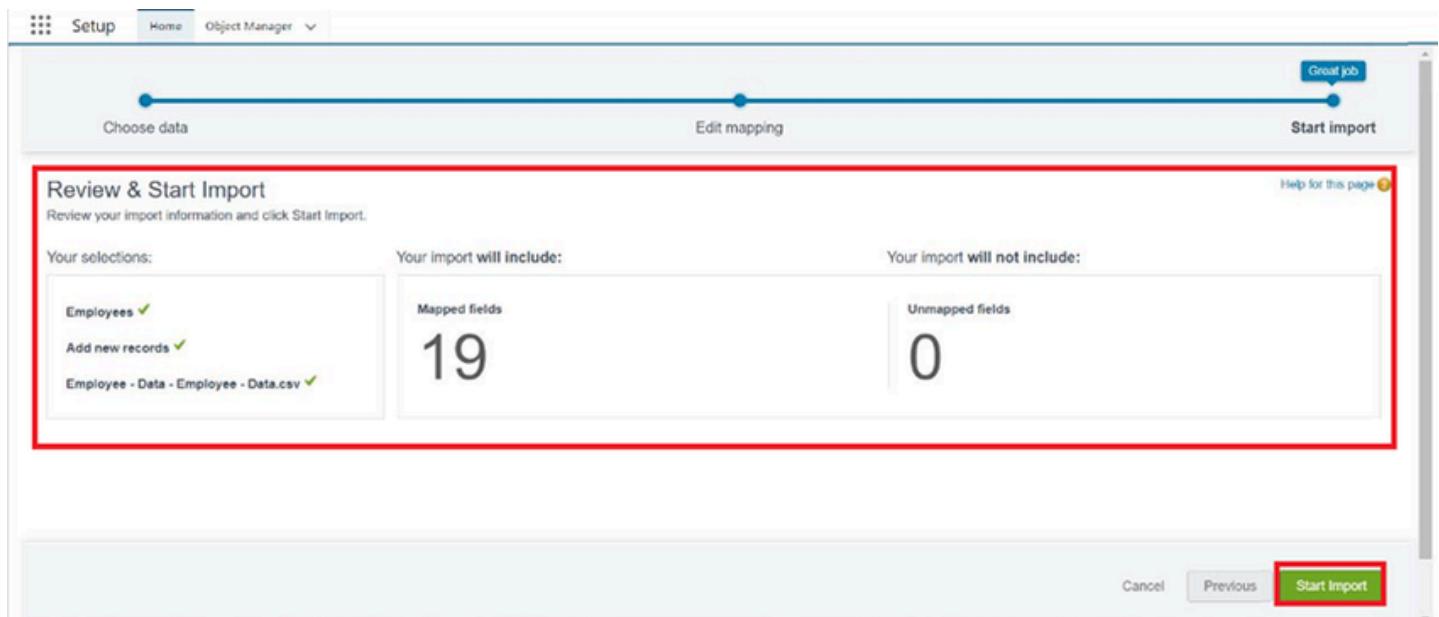
Choose data Edit mapping Start import 

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	27/02/1998	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	8	5
Change	Phone no	Phone no	7995434750	7995434751	7995434752

Cancel Previous **Next**

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



Setup Home Object Manager ▾

Choose data Edit mapping Start import

Great job

Help for this page 🎉

Review & Start Import

Review your import information and click Start Import.

Your selections:

- Employees ✓
- Add new records ✓
- Employee - Data - Employee - Data.csv ✓

Your import will include:

Mapped fields	Unmapped fields
19	0

Cancel Previous **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.



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	Retry Count	State Message	Status
View Request	View Result	7515100000JeYH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	105	60	0	10	0	0	Completed	

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

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.

Activity 1: 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"/>

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						
Projects	<input type="checkbox"/>					
ProjectTasks	<input type="checkbox"/>					

4. Scroll down and Click on Save.

Activity 2: 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.

Activity 3: Create Employee Profile

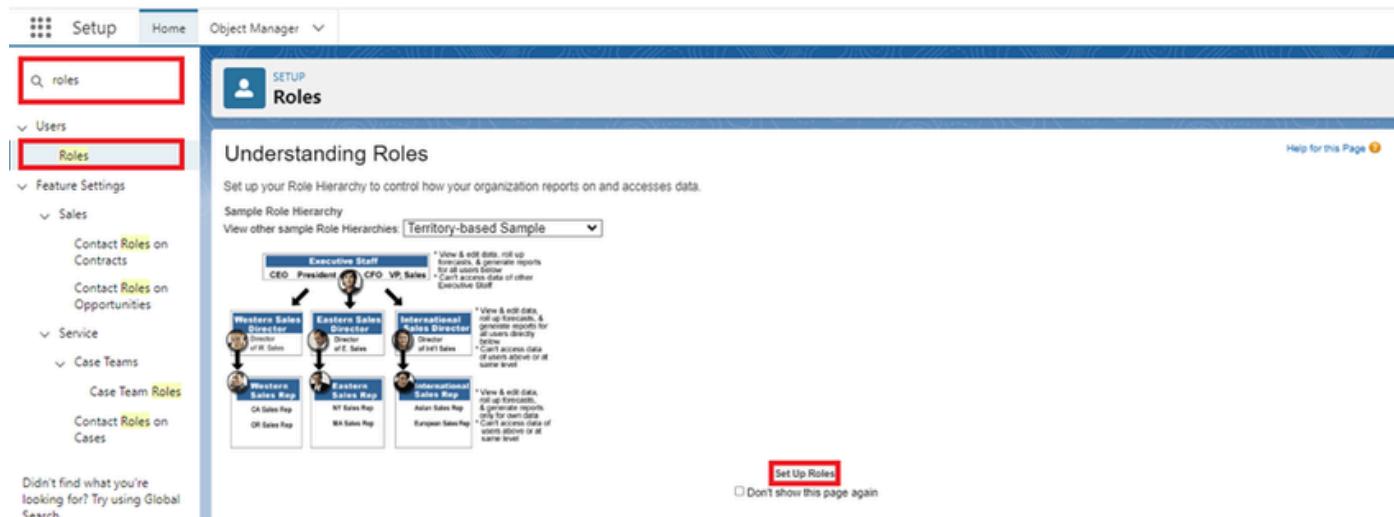
Create Employee Profiles for “On Site Employee”, “Remote Employee” as in Activity 2, but in step 3 only allow permission access for Project and Project Task objects only.

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.

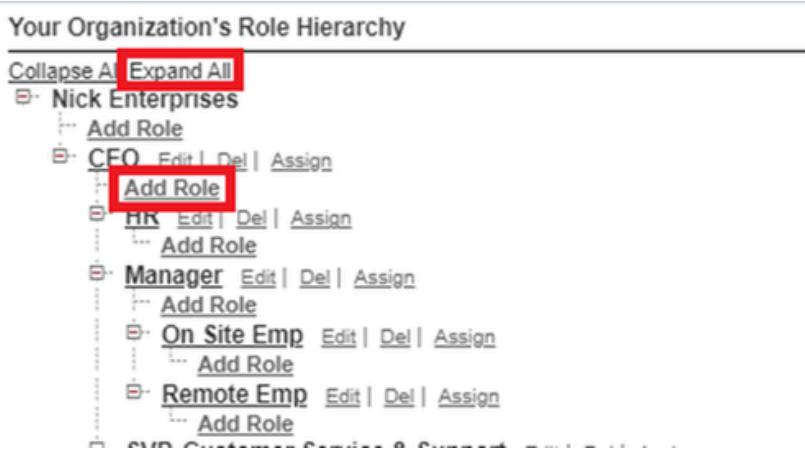
Activity 1: Creating HR Role

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



The screenshot shows the Salesforce Setup interface for Roles. The left sidebar has a search bar and navigation links for Home, Object Manager, and Roles (which is highlighted with a red box). The main content area displays a 'Sample Role Hierarchy' diagram. At the top level is 'Executive Staff' with three sub-nodes: 'CEO - President', 'CFO - VP, Sales', and 'International Sales Director'. The 'CEO' node has a note: '* View & edit data, roll up forecasts, & generate reports for all users below.' The 'CFO' node has a note: '* View & edit data, roll up forecasts, & generate reports for all users below or at same level.' The 'International Sales Director' node has a note: '* View & edit data, roll up forecasts, & generate reports for all users below or at same level.' Below each of these are more detailed roles: 'Western Sales Director' (under CEO), 'Eastern Sales Director' (under CFO), and 'International Sales Director' (under International Sales Director). Under 'Western Sales Director' are 'Western Sales Rep', 'CA Sales Rep', and 'OR Sales Rep'. Under 'Eastern Sales Director' are 'Eastern Sales Rep', 'NY Sales Rep', and 'WA Sales Rep'. Under 'International Sales Director' are 'International Sales Rep', 'Asian Sales Rep', and 'European Sales Rep'. At the bottom right of the page is a 'Set Up Roles' button, which is also highlighted with a red box.

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. At the top, there is a 'Collapse All' and 'Expand All' link, with 'Expand All' highlighted with a red box. Below this, the organization structure is shown as a tree. 'Nick Enterprises' is expanded, showing its children: 'CFO', 'Manager', 'On Site Emp', 'Remote Emp', and 'HR'. Each of these child nodes has an 'Edit | Del | Assign' link and an 'Add Role' link, which is also highlighted with a red box. The 'CFO' node also has an 'Add Role' link under it.

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"/> 
This role reports to	<input type="text"/>  CEO
Role Name as displayed on reports	<input type="text"/>

Save **Save & New** **Cancel**

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

Activity 2: Creating more roles

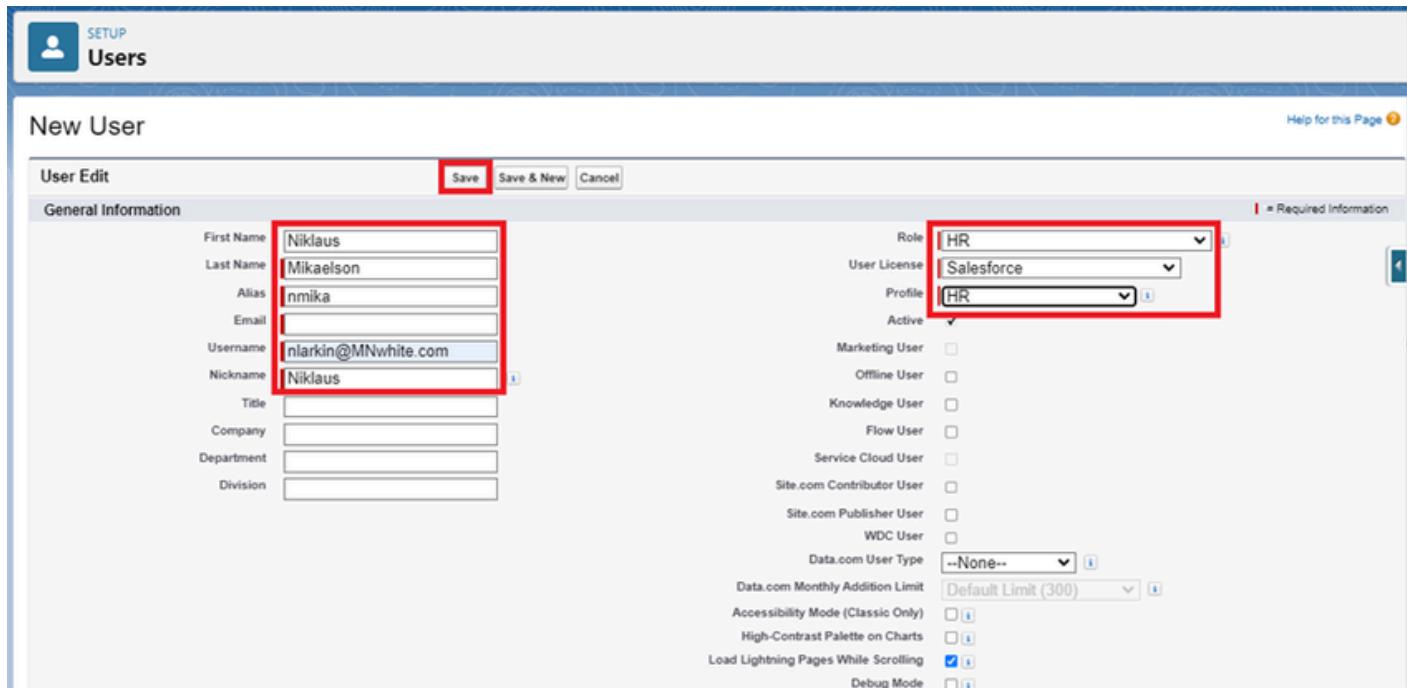
Create three more roles for Manager, On Site Employee, Remote Employee.
Note: On Site Employee and Remote Employee reports to Manager.

Use case :

TheSmartBridge is all set to move with the Salesforce platform. As this platform is very new to the employees in the organization it's up to you to enlight every employee in it.

Activity 1: 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



The screenshot shows the 'User Edit' page for a new user. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' field is set to 'HR', 'User License' is 'Salesforce', and 'Profile' is 'HR'. Other optional settings like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, and Debug Mode are also visible.

3. Save.

Activity 2: 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.

Activity 3: Creating more users

Create two more users as we created in activity 2.

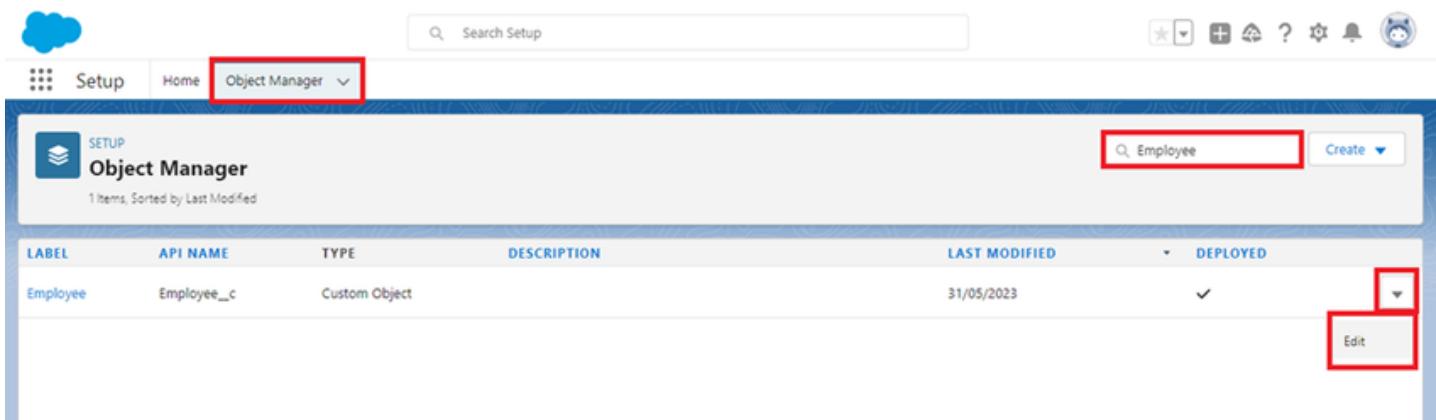
Page layouts

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.

Activity 1 : creating a page layout for Employee object

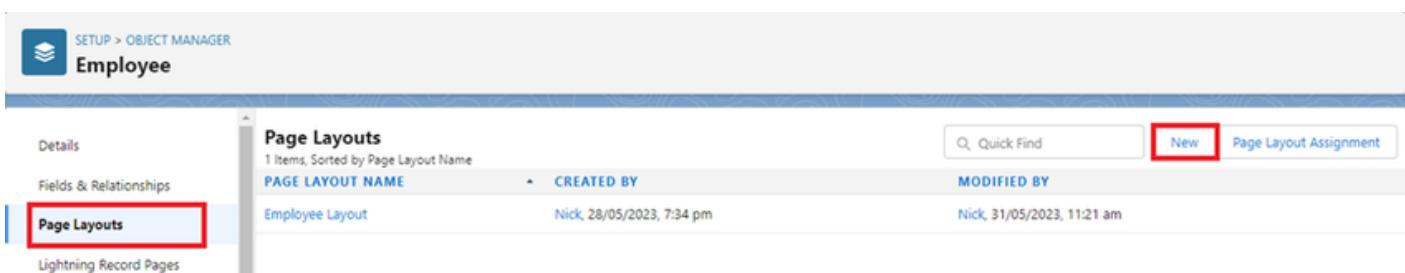
To Create a Page layout:

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



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is set to 'Employee'. The main table lists one item: 'Employee' (Employee__c, Custom Object, last modified 31/05/2023). The 'Edit' button for this row is highlighted with a red box.

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



The screenshot shows the 'Page Layouts' section of the Employee object setup. The left sidebar has 'Page Layouts' selected. The main table shows one layout: 'Employee Layout' (Created by Nick on 28/05/2023, Modified by Nick on 31/05/2023). The 'New' button at the top right is highlighted with a red box.

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
	<input type="button" value="Save"/> <input type="button" value="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.

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

Activity 2 : 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.

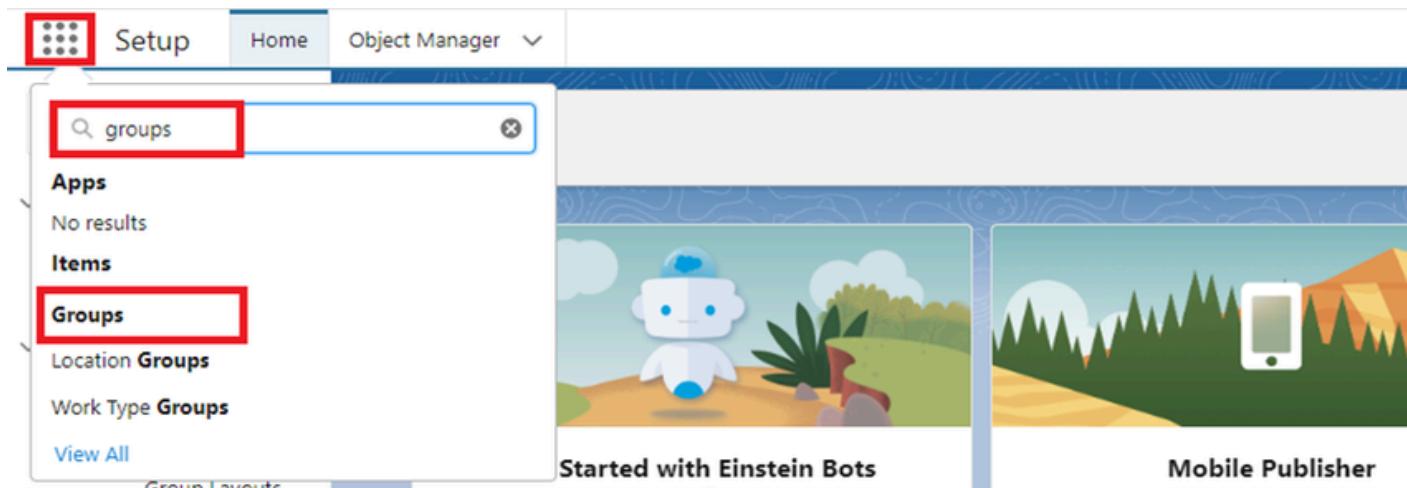
Chatter group

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.

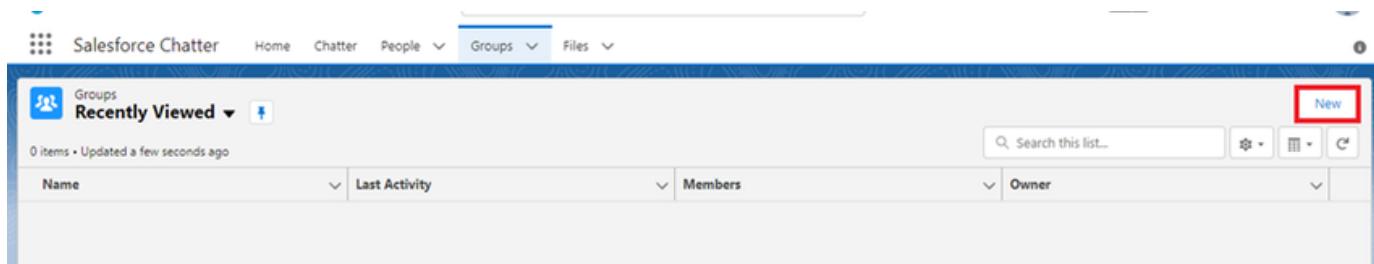
Activity 1 : Creating a chatter group for your organization.

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 these details:

Field	Value
1.Group 2.Name 3.Description 4.Access Type Allow 5.Customers	Internal Discussion Give a understanding Description on your own Private Checked

Resource Chatter Home Chatter

Recently Viewed ▾ 8 minutes ago

New Group

Name: Internal Discussion

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.

Information:

Salesforce Sans 12 B I U

Cancel Save & Next

Chatter Home Chatter

Recently Viewed ▾ 8 ago

New Group

Group Email

Owner: Employee Project

Disable automatic archiving:

Access Type: Private

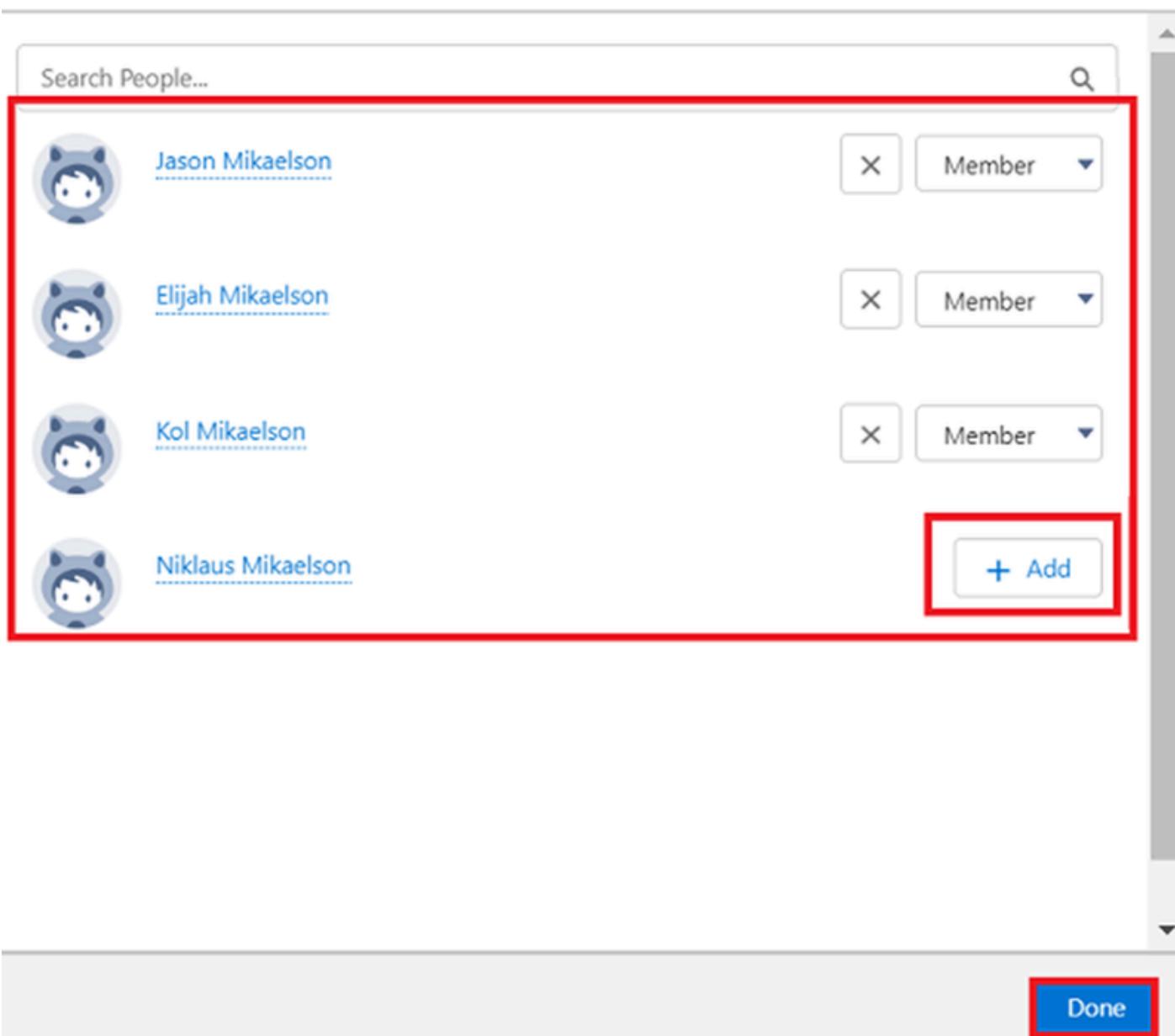
Allow customers:

Broadcast Only:

Cancel Save & Next

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

Manage Members



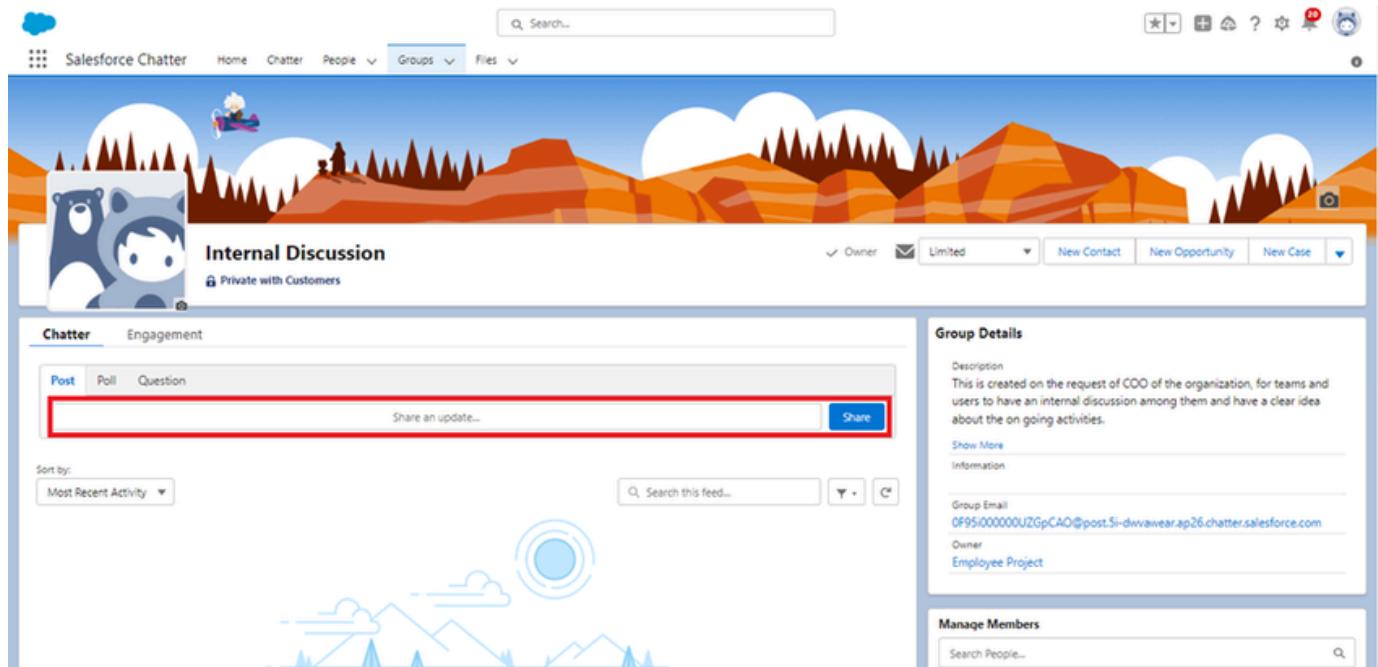
The screenshot shows the 'Manage Members' interface. At the top left is a search bar labeled 'Search People...' with a magnifying glass icon. Below it is a list of four users, each with a small profile picture and a name link:

- Jason Mikaelson
- Elijah Mikaelson
- Kol Mikaelson
- Niklaus Mikaelson

Each user entry has a red 'X' icon and a dropdown menu set to 'Member'. At the bottom right of the list is a large red-bordered button with a plus sign and the word 'Add'. A vertical scroll bar is visible on the right side of the list area.

At the very bottom right of the entire screen is a blue 'Done' button.

7 .Click Done.



The screenshot shows the Salesforce Chatter interface for an 'Internal Discussion' group. The top navigation bar includes 'Salesforce Chatter', 'Home', 'Chatter', 'People', 'Groups', and 'Files'. A search bar is at the top right. The main area features a colorful mountain and cloud background. On the left, there's a sidebar with 'Chatter' and 'Engagement' tabs, and a 'Post' button highlighted with a red box. Below it is a text input field 'Share an update...' and a 'Share' button. To the right, the 'Group Details' section contains the group's 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.' It also shows the group's email address (0F95000000UZGpCAO@post.5i-dwvwear.ap26.chatter.salesforce.com), owner (Employee Project), and a 'Manage Members' section with a search bar.

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.

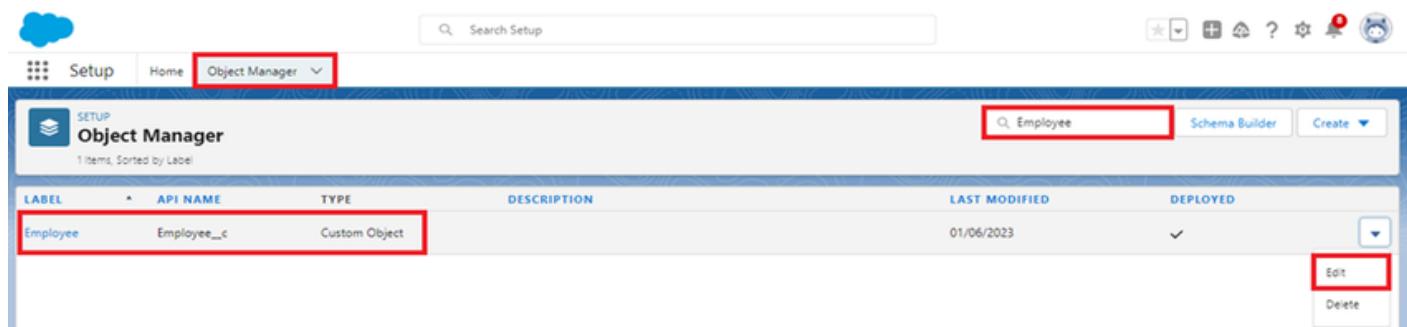
Record types :

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.

Activity 1: Creating On Site Employee Record Type

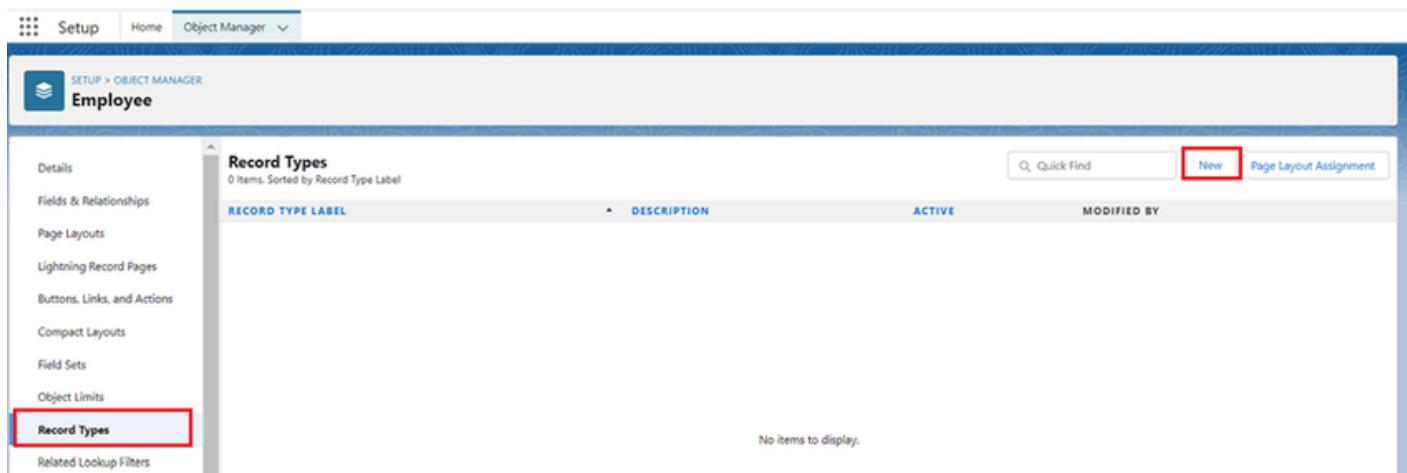
To create a Record Type:

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



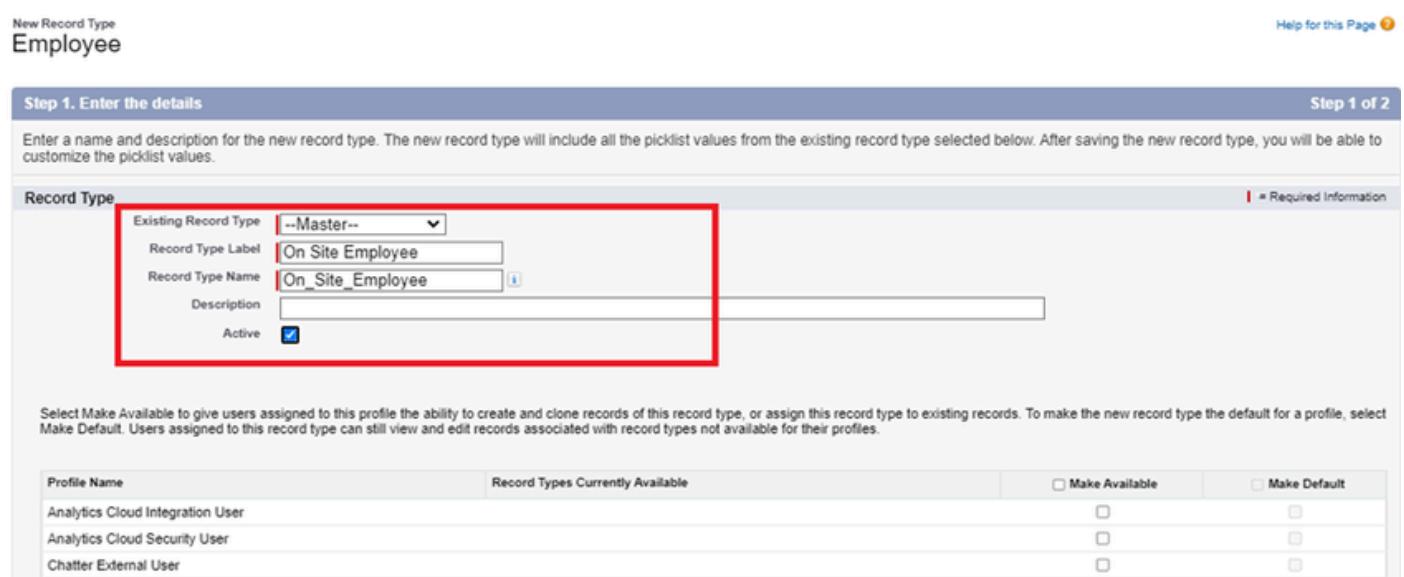
The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is selected and highlighted with a red box. A search bar at the top right contains the text 'Employee'. Below the search bar, there is a 'Schema Builder' button and a 'Create' button. The main area displays a table titled 'Object Manager' with 1 item. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. A single row is shown for the 'Employee' object, which is a 'Custom Object'. The 'Edit' button in the last column is also highlighted with a red box. The status bar at the bottom indicates '01/06/2023'.

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



The screenshot shows the Salesforce Setup interface for the 'Employee' object. The left sidebar has a 'Record Types' option selected, which is highlighted with a red box. At the top right, there is a 'New' button, also highlighted with a red box. The main area displays a table titled 'Record Types' with columns for 'RECORD TYPE LABEL', 'DESCRIPTION', 'ACTIVE', and 'MODIFIED BY'. A message at the bottom states 'No items to display.'

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



The screenshot shows the 'New Record Type' page for the 'Employee' object. The 'Record Type' section is highlighted with a red box. It contains the following fields:

- Existing Record Type: --Master--
- Record Type Label: On Site Employee
- Record Type Name: On_Site_Employee
- Description: (empty)
- Active:

At the bottom of the page, there is a note: "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." Below this, there is a table showing 'Profile Name' and 'Record Types Currently Available' for three profiles: Analytics Cloud Integration User, Analytics Cloud Security User, and Chatter External User. The 'Make Available' and 'Make Default' checkboxes are shown for each profile.

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 checked="" 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:	Page Layout
Analytics Cloud Integration User	Employee Layout
Analytics Cloud Security User	Employee 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 Save & New **Save** Cancel

7. click Save.

Activity 2: Creating "Remote Employee" Record Type

Create another Record Type with name “Remote Employee” following the step from activity 1.

Note: use Remote Employee page layout for Remote Employee record type

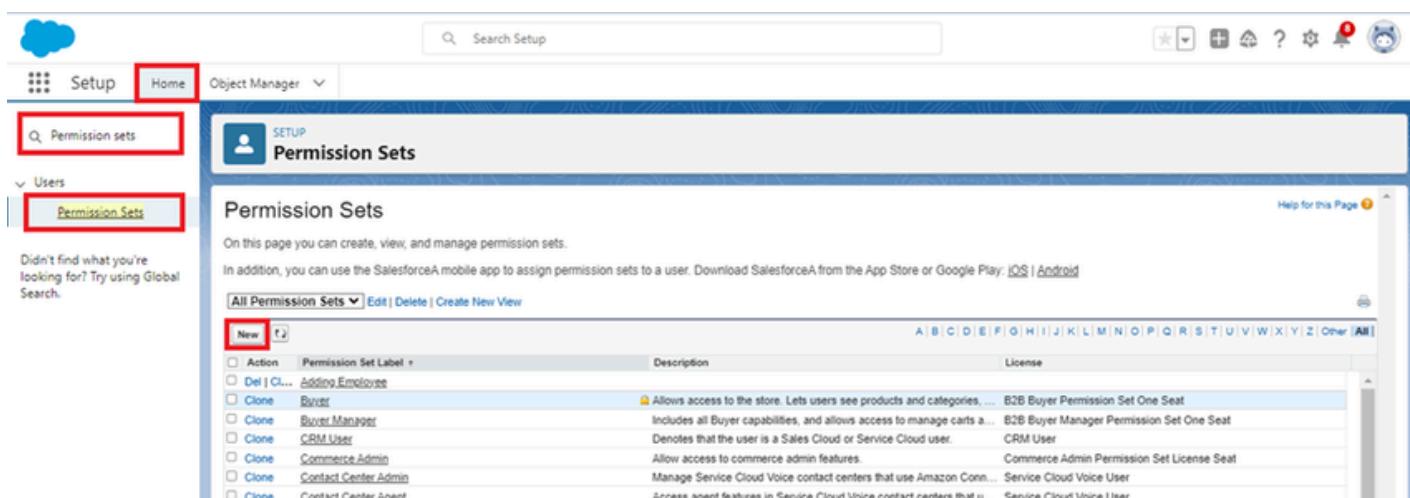
Permission sets

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.

Activity 1: Creating a permission set

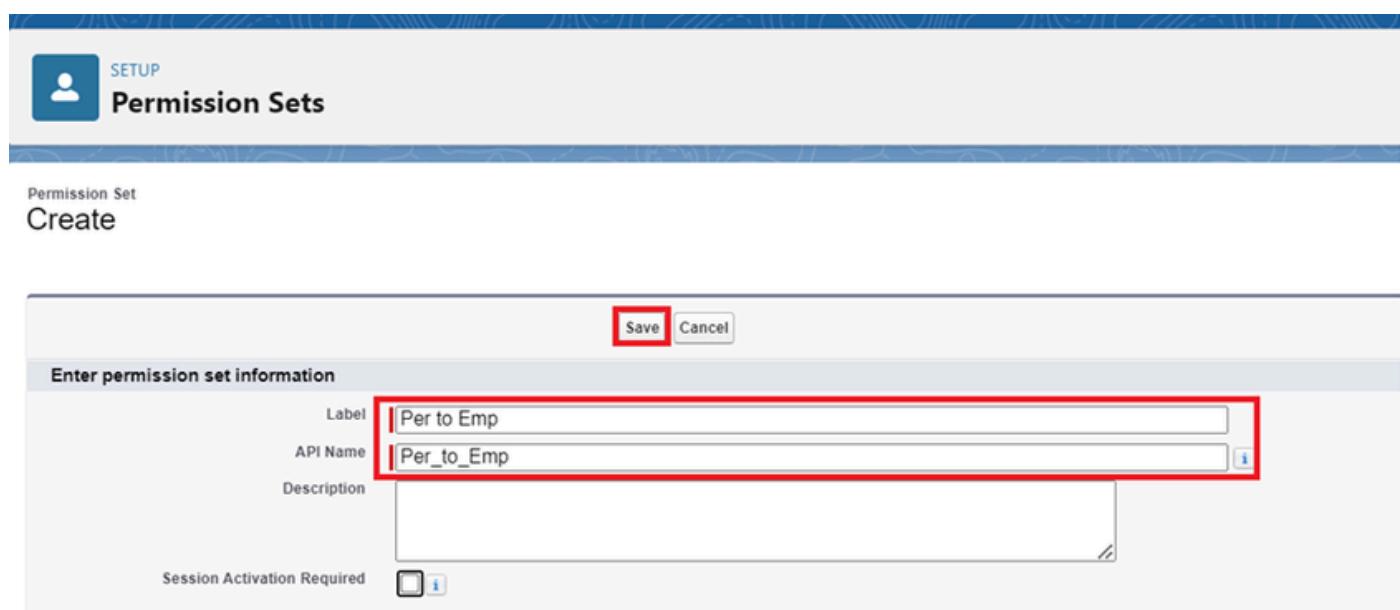
To Create a Permission Set:

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' (highlighted with a red box), 'Home', 'Object Manager', and a search bar. Below the navigation is a sidebar with 'Q. Permission sets' (highlighted with a red box) and 'Users'. Under 'Permission Sets' (highlighted with a red box), there is a note about global search and a link to help for this page. The main content area is titled 'Permission Sets' and contains a table of existing permission sets. The table columns are 'Action', 'Permission Set Label', 'Description', and 'License'. The table includes rows for 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', and 'Contact Center Agent'. A 'New' button is visible at the top left of the table.

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



The screenshot shows the 'Create Permission Set' dialog box. At the top, it says 'Permission Set Create'. Below that, there's a section titled 'Enter permission set information'. It has fields for 'Label' (containing 'Per to Emp') and 'API Name' (containing 'Per_to_Emp'). Both of these fields are highlighted with a red box. There are also fields for 'Description' and 'Session Activation Required'. At the bottom right of the dialog are 'Save' and 'Cancel' buttons, with 'Save' highlighted with a red box.

3. Under Apps Select object settings.

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

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

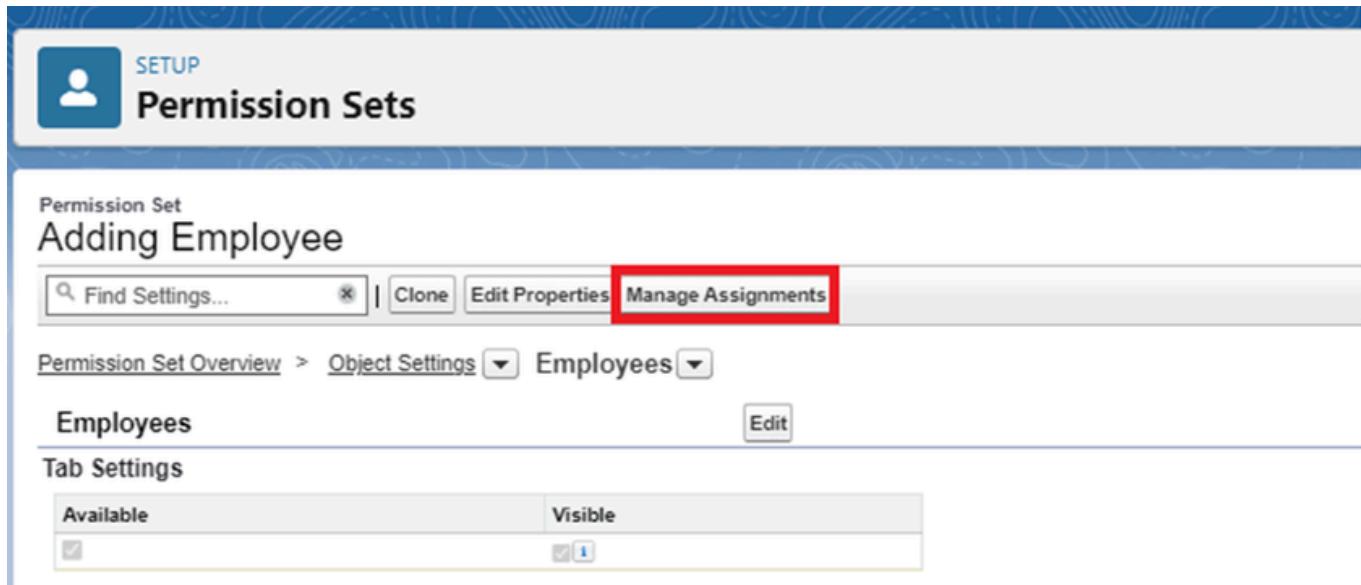
Record Types	Assigned Record Types
On Site Employee	<input checked="" type="checkbox"/>
Remote Employee	<input type="checkbox"/>

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"/>

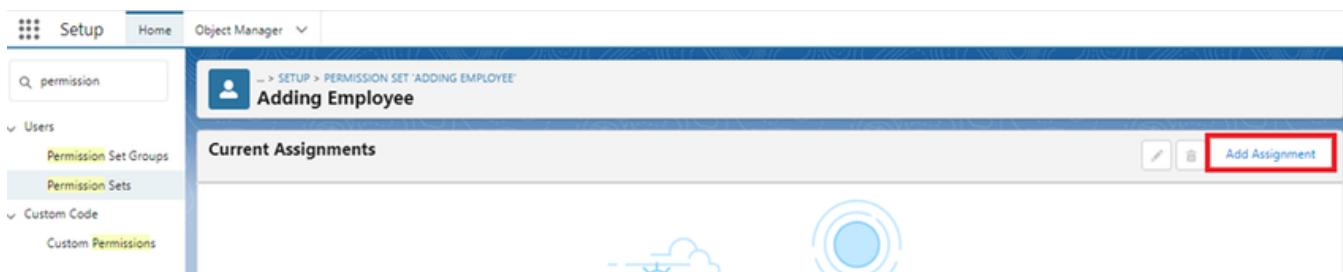
5. Click on Save.

6. After saving the permission click on the Manage assignment



The screenshot shows the 'Permission Sets' page in Salesforce. The top navigation bar includes 'SETUP' and a user icon. Below it, the title 'Permission Set Adding Employee' is displayed. A toolbar with 'Find Settings...', 'Clone', 'Edit Properties', and 'Manage Assignments' buttons is shown, with 'Manage Assignments' highlighted by a red box. The breadcrumb path 'Permission Set Overview > Object Settings > Employees' is visible. The main content area shows 'Employees' tab settings, with an 'Edit' button and a 'Tab Settings' section containing a table with columns 'Available' and 'Visible'. The 'Visible' column has a checkbox checked.

7. Now click on the Manage Assignment.



The screenshot shows the 'Current Assignments' page in Salesforce. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows 'Users' with 'Permission Sets' selected, and 'Custom Code' with 'Custom Permissions' selected. The main content area displays the 'Adding Employee' permission set under 'Current Assignments'. A 'Add Assignment' button is highlighted by a red box.

8. Click on Add Assignment.

Select Users to Assign

All Users ▾

1 item selected

Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Chatter Expert	Chatter	chatty.00d5i00000ewzcbea5.165fc3eeew2or@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> demo project	dproj	nadeem@smart.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input checked="" type="checkbox"/> Elijah Mikaelson	emika	elijah@smart.com	On Site Employee	<input checked="" type="checkbox"/>	On Site Employee
<input type="checkbox"/> Integration User	integ	integration@00d5i00000ewzcbea5.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Jason Mikaelson	jmika	jason@smart.com	Remote Employee	<input checked="" type="checkbox"/>	Remote Employee
<input type="checkbox"/> Kol Mikaelson	kmika	kol@smart.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> Niklaus Mikaelson	nmika	nikmik@smart.com	HR	<input checked="" type="checkbox"/>	HR

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.

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

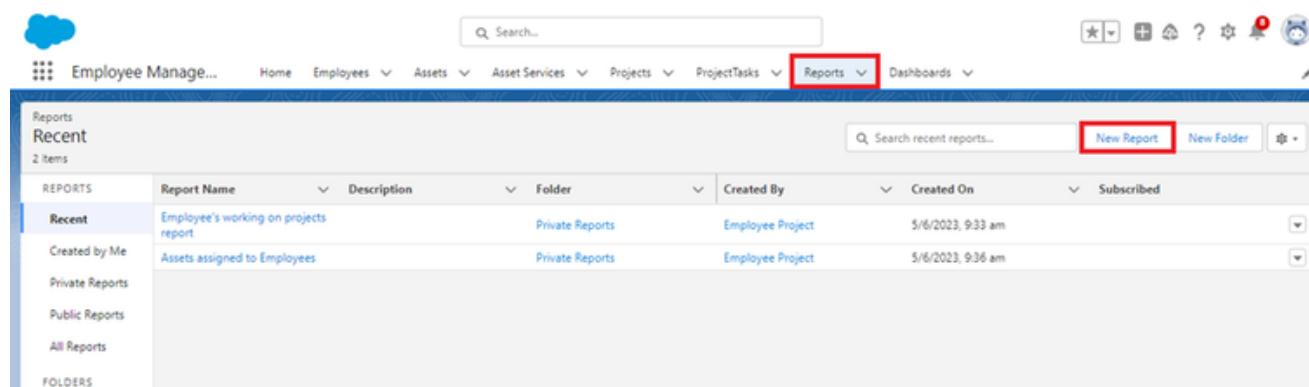
Types of Reports in Salesforce

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

Activity 1: 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 Employee Management application. At the top, there is a navigation bar with links for Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports (which is highlighted with a red box), and Dashboards. Below the navigation bar is a search bar labeled "Search...". On the left, there is a sidebar with sections for Reports (Recent, 2 items), Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), and Folders. The main content area displays a table of recent reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. Two reports are listed: "Employee's working on projects report" and "Assets assigned to Employees". Both reports are in the "Private Reports" folder, created by "Employee Project" on 5/6/2023 at 9:33 am and 9:36 am respectively. There are also buttons for "New Report" and "New Folder".

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

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Select a Report Type

employee

Report Type Name

Category

Activities with Employees

Standard

Employees

Standard

Employees with Reports to

Standard

Employees with ProjectTasks and Projects

Standard

Employee History

Standard

Assets with Employee Name

Standard

Projects with ProjectTasks and Employees

Standard

Details

Employees

Standard Report Type

Start Report

Details

Fields (26)

Created By You

No Reports Yet

Created By Others

No Reports Yet

Objects Used in Report Type

Owner

4. Customize your report

--> Add fields from left pane as shown below

Employee Manage... Home Employees Assets Asset Services Projects ProjectTasks Reports Dashboards

REPORT New Employees Report Employees

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

Employee	Employee Name	Employee ID	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
1	a005 00000H976	-	-	-	-	-	http://https://linkedin.in
2	Eng for Junction test	a005 00000H97V	-	8:00 am	5:00 pm	-	http://https://linked.in

Add column...

Employee: Employee Name X
Employee: ID X
Reports to X
Login Time X
Logout Time X
Mode of Work X
LinkedIn Profile X

Save & Run Save Close Run Update Preview Automatically

5. Save or run it.

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

Activity 2: 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”.

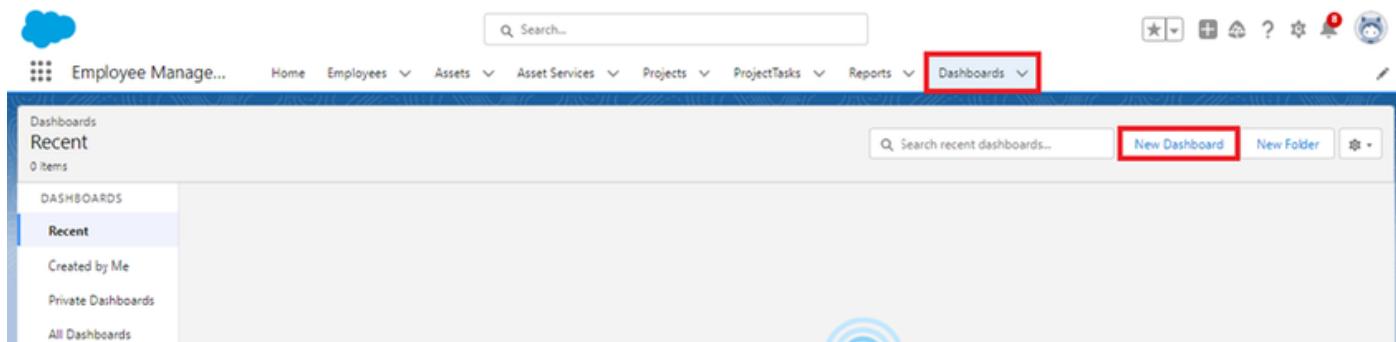
Dashboards

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 quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Activity 1: Create Dashboard

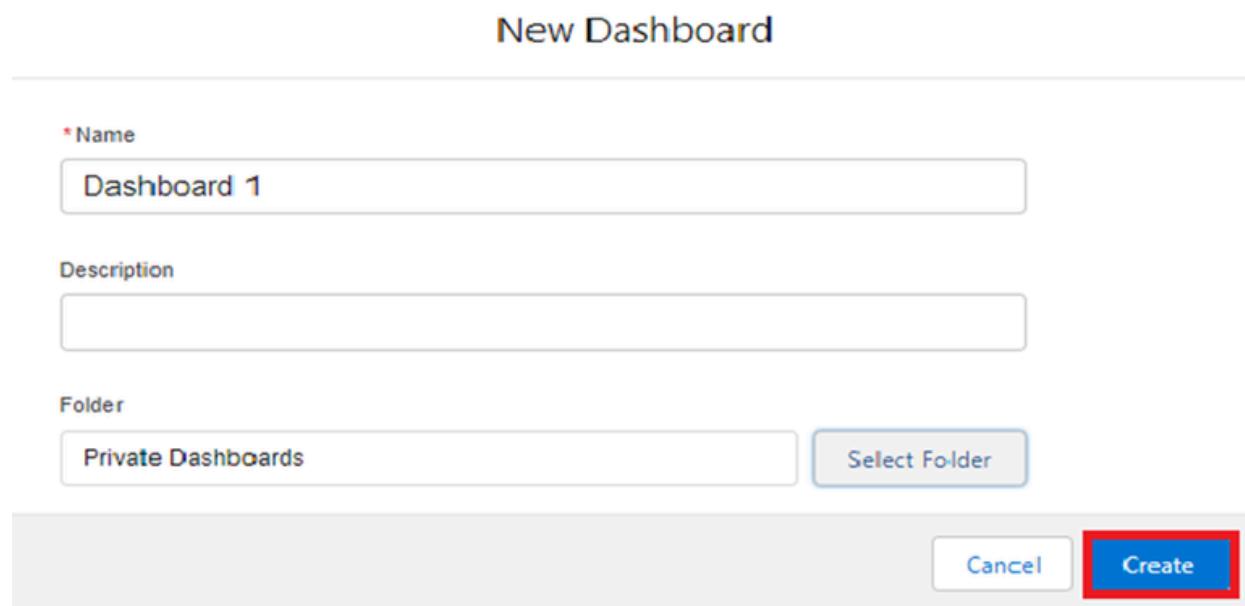
To Create a Dashboard

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



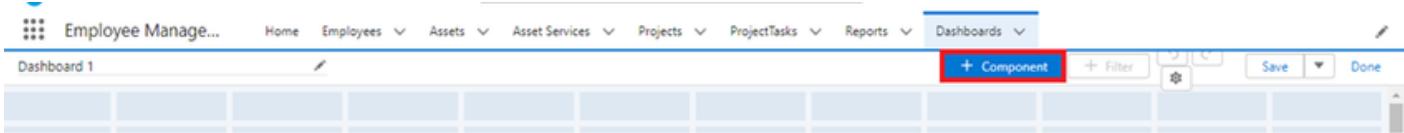
The screenshot shows the Smart Internz application interface. At the top, there is a navigation bar with various menu items: Employee Manage..., Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports, and Dashboards. The 'Dashboards' item is highlighted with a red box. Below the navigation bar is a search bar labeled 'Search...'. To the right of the search bar are several small icons. The main content area is titled 'Dashboards' and has a sub-section titled 'Recent'. It shows '0 items'. On the left, there is a sidebar with categories: DASHBOARDS, Recent, Created by Me, Private Dashboards, and All Dashboards. On the right, there is a large empty space with a blue circular progress bar at the bottom.

2. Give a Name and click on Create.

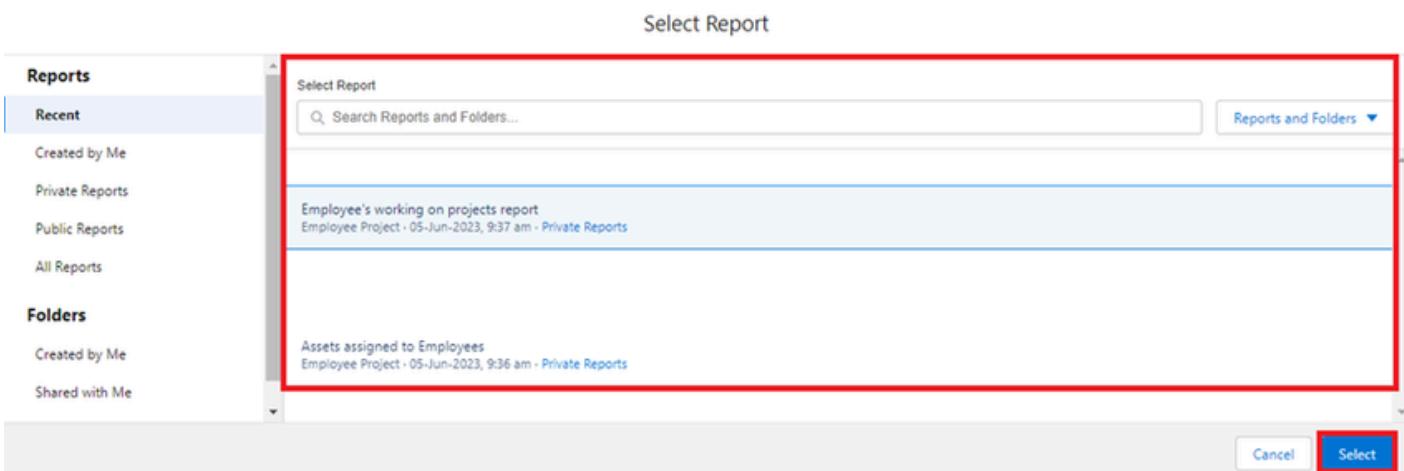


The screenshot shows a 'New Dashboard' dialog box. At the top, it says 'New Dashboard'. Below that, there is a field labeled 'Name' with the value 'Dashboard 1'. There is also a 'Description' field which is currently empty. Below the description field is a 'Folder' section with a dropdown menu set to 'Private Dashboards' and a 'Select Folder' button. At the bottom of the dialog box are two buttons: 'Cancel' and 'Create', with 'Create' being highlighted with a red box.

3. Select add component.



4. Select a Report and click on select.



Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

Select Report

Search Reports and Folders...

Employee's working on projects report
Employee Project - 05-Jun-2023, 9:37 am - Private Reports

Assets assigned to Employees
Employee Project - 05-Jun-2023, 9:36 am - Private Reports

Cancel Select

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

Activity 2:

Create another Dashboard as we discussed in activity 1.

Approval Process

Use Case:

The Hiring Manager (HR) at TheSmartBridge wants to track the leave applications for each and every employee of the company. His requirement is the no leave application with more than 5 days of leave should come to him but automatically get submitted to the Employee Manager. If the leave application is more than 5 days then only his approval is needed.

As an Admin to TheSmartBridge you know what to do in order to achieve this requirement.

Activity - 1

Prerequisites:

Create the leave object with the following fields.

Object	Fields	Datatype
Leave	Employee NameNo. of DaysSubjectDescr iptionStatu	Lookup with Employee object Number Text Text Area(Rich) Picklist: values as follows
Leave		Submitted Approved Rejected

Create the tab for the leave object.

Activity - 2

Create an Approval Process for Leave object.

- 2 .In the Manage Approval Processes For list, select Leave.
- 3 .Click Create New Approval Process and select Use Jump Start Wizard.
- 4 .Enter the following parameters

Parameter	Value
Name	Leave Approval Request
Unique Name	Leave_Approval_Request(This automatically gets sent when you tab out of the Name field)
Approval Assignment Email Template	Leave blank
Add the Submit for Approval button and Approval History related list to all Travel Approval page layouts	Leave this selected/checked
Use Approver Field of Leave Owner	Leave unselected/unchecked.
Select Approver	select Automatically assign to approver(s) and for users select the name of the user with the Manager role.

- 5 .Click Save.
- 6 .Click View Approval Process Detail Page.

Activity - 3

Initial Submission Action:

- 1 .Under initial submission action click on add new and then select field update.
- 2 .Give name as “Approval Status to Submitted”.
Select Status for the field to update.

Under specify new field value select “A specific value” and select submitted and click Save.

Activity - 4

Approval Steps:

- 1 .While you are still on Leave Approval Request detail page,
Under approval steps click the new approval step.
- 2 .Give the name as “Approval from HR” and click on next.

3.Under specify step criteria select “Enter this step if the following (Criteria are met)”,

Select field : “Leave: No. of Days”,

Operator : equal

Value : 5

4 .Click next

5 .Under select approver : select Automatically assign to approver(s) and for users select the name of the user with the HR role.

6 .Click on Save.

7 .No, I'll do this later. Take me to the approval process detail page to review what I've just created and click Go.

Activity - 5

Final Approval Action:

1 .Under initial submission action click on add new and then select field update.

Give name as “Approval Status to Approved”

2 .Select Status for the field to update.

Under specify new field value select “A specific value” and select Approved and click Save.

Activity - 6

Final Rejection Action:

1 .Under initial submission action click on add new and then select field update.

2 .Give name as “Approval Status to Rejected”.

Select Status for the field to update.

Under specify new field value select “A specific value” and select Rejected and click Save.

Apex Trigger

Use Case:

The Manager at TheSmartBridge wants no duplicate names of employees should enter into the database. So he/she recalls you for the solution.

Write a code to achieve this requirement using Salesforce developer skills to fulfill the Managers requirement.

Activity 1 : Create an Apex Trigger

Create an Apex Trigger

1 .To create a new Apex Class follow the below steps

:

Click on the file --> New --> Apex Class.

2 .Give the Apex Trigger name as “EmplInsert”, and select “Employee_c” from the dropdown for sObject.

3 .Click Submit.

4 .Now write the code logic here

Code Snippet:

```
trigger EmplInsert on Employee_c (before insert) {  
    for(Employee_c pass : Trigger.New){  
        List<Employee_c> mynew = [SELECT Id, Name FROM Employee_c WHERE  
        Employee_Name_c =: pass.Employee_Name_c];  
        if(mynew.size() > 0){  
            pass.Name.addError('Employee with same name is existing');  
        }  
    }  
}
```

5 .Save the code.(click on file --> Save)

Activity 2 : Testing the Trigger

Follow the steps which are mentioned in Milestone 7, Activity 1 and try to create a record with the existing Employee Name say “Jackie Chan” you’ll face the error while saving the record saying “Employee with same name is existing”.

Conclusion:

The Salesforce Administration Solution(dev) project has met its objectives delivering a more efficient and user friendly Salesforce environment with continue optimization and stackholder engagement,these solutions will drive long term value for the organization.