

WORKFORCE ADMINISTRATION SOLUTION



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PROJECT ABSTRACT:

Workforce Administration in Salesforce refers to the strategic management of employee resources within organizations using the Salesforce platform. It encompasses the planning, tracking, and optimization of workforce activities to enhance productivity and engagement. By leveraging Salesforce's robust capabilities, businesses can streamline processes related to recruitment, onboarding, performance management, and employee development.

This abstract highlights the integration of Salesforce tools like Salesforce Essentials and Salesforce Service Cloud to facilitate workforce management. Key features include automated workflows, data analytics for performance insights, and customizable dashboards that provide real-time visibility into workforce metrics. Moreover, Salesforce fosters collaboration through Chatter and Communities, enabling seamless communication among team members.

The implementation of workforce administration in Salesforce not only improves operational efficiency but also enhances employee satisfaction by providing a centralized platform for managing HR-related tasks. By aligning workforce strategies with organizational goals, businesses can achieve greater agility and responsiveness in today's dynamic market environment. Overall, Salesforce serves as a powerful ally in workforce administration, driving both employee performance and organizational success.

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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.

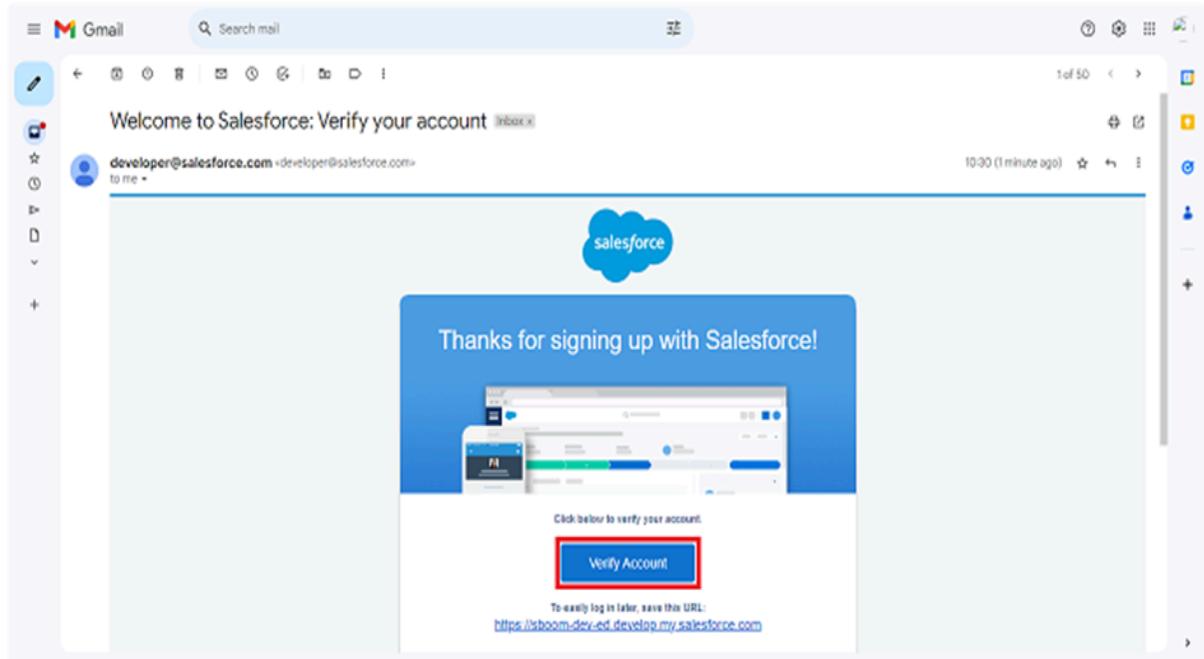
The image shows a screenshot of the Salesforce Developer Edition sign-up page. At the top, there's a large blue header with the text "Build enterprise-quality apps fast to bring your ideas to life". Below this, there's a list of features:

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

The main form area has fields for First Name*, Last Name*, Email*, Role*, and Company*. The Salesforce logo is at the top right of the form area.

Activity 2: Account Activation

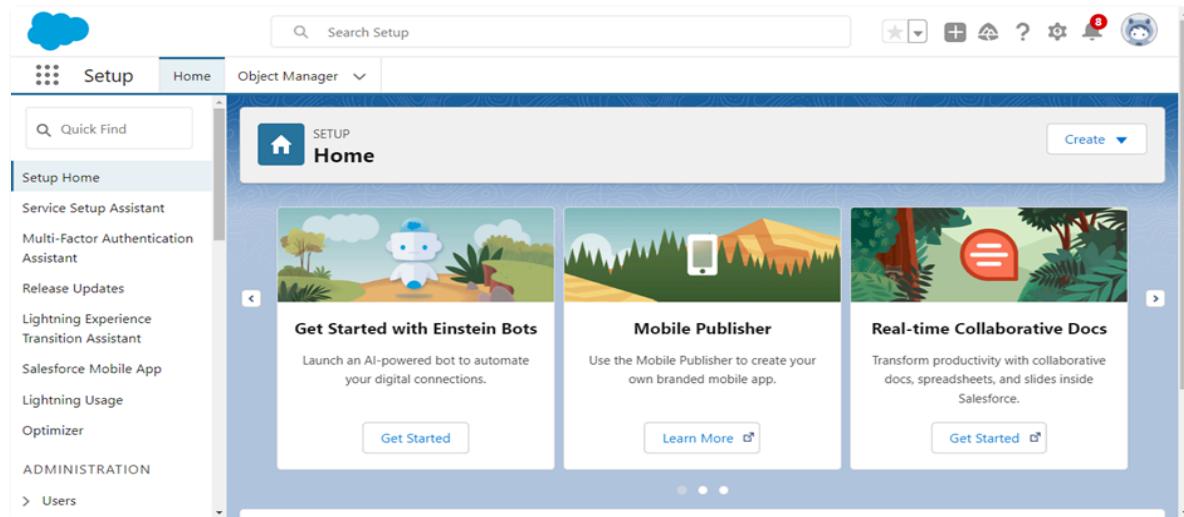
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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

A screenshot of a "Change Your Password" page. The title is "Change Your Password". It says "Enter a new password for lead@sb.com. Make sure to include at least:" followed by three requirements: "8 characters", "1 letter", and "1 number". There are two input fields: "New Password" and "Confirm New Password", both of which have red boxes around them. Below these is a "Security Question" section with a dropdown menu showing "In what city were you born?". Underneath is an "Answer" field containing "asdfghjkl". At the bottom is a large blue "Change Password" button, also with a red box around it.

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



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

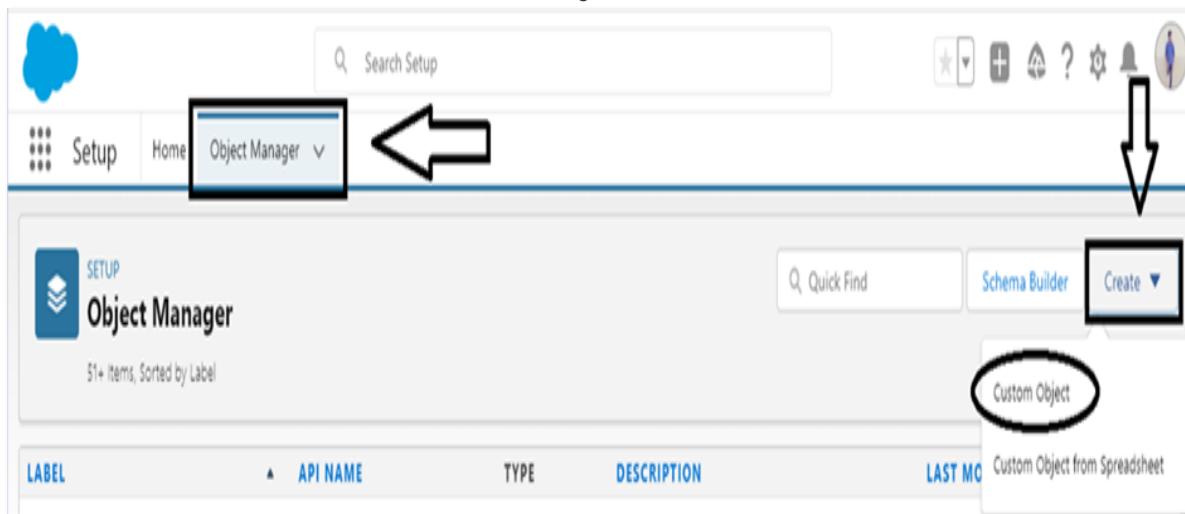
essential to their organization. They are the heart of any application and provide a structure for sharing data.

Activity 1: Create Employee Object

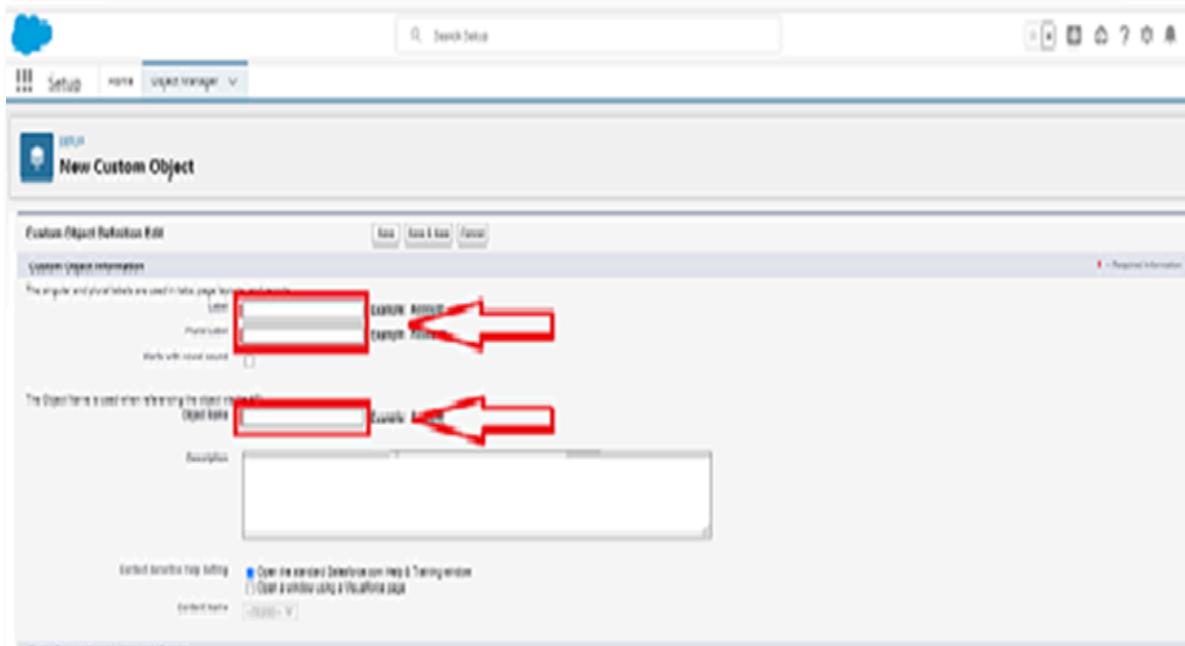
The purpose of creating an Employee custom object is to keep track the employee's activities and their individual and as well as team progress.

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

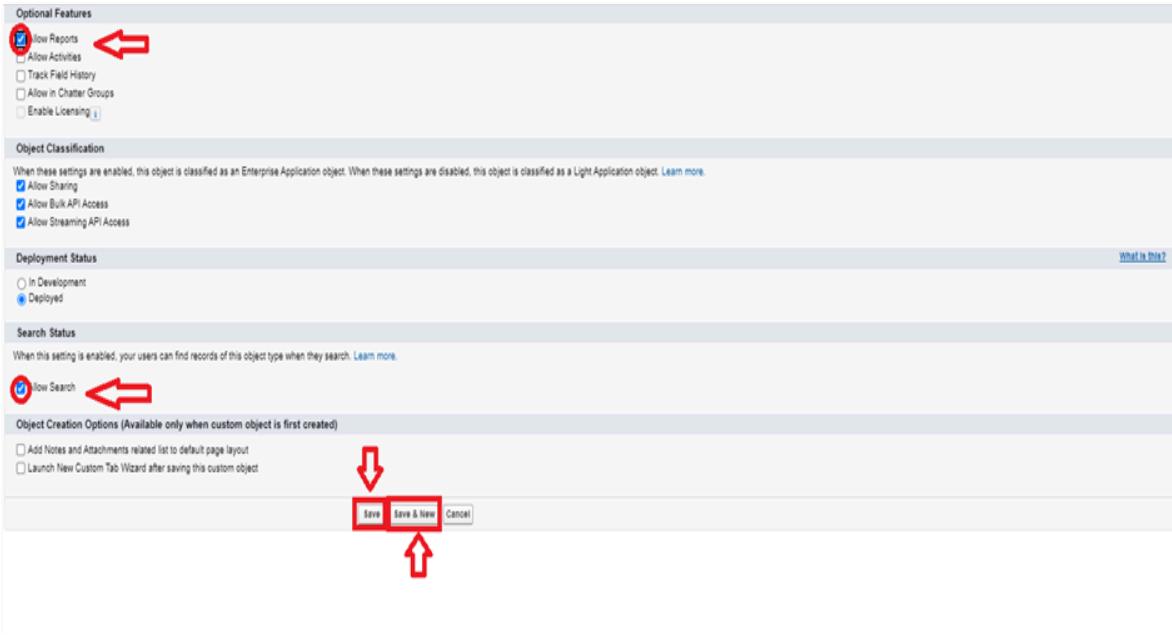
- 1 Record Name : Employee ID
- 2 Data Type : Auto Number
- 3 Display Format : EMS-{0000}
- 4 Starting Number : 1

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	Employee Id	Example: Account Name
Data Type	Auto Number	
Display Format	EMS-{0000}	Example: A-{0000} What Is This?
Starting Number	1	

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



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.

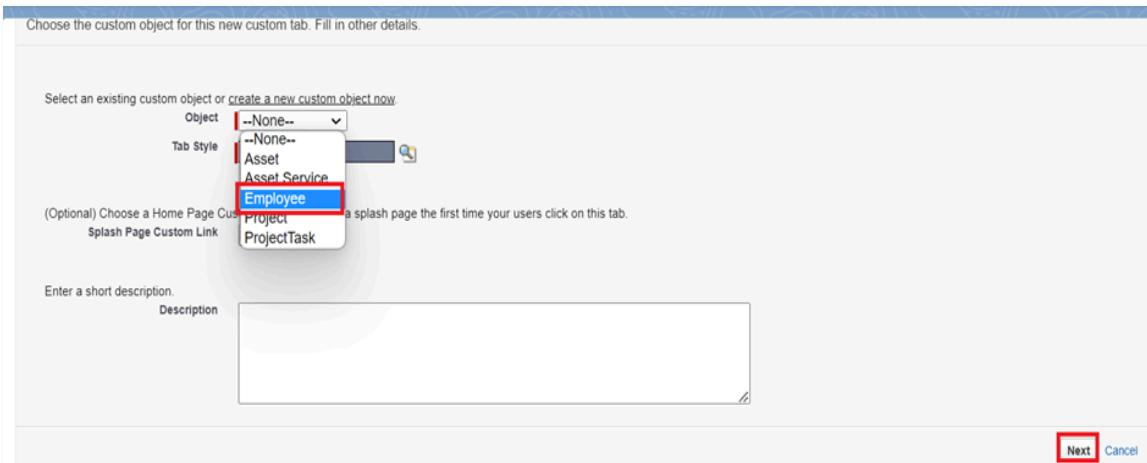
Activity 1: Creating a Custom Tab (Employee)

To create a Tab:(Employee)

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

The screenshot shows the Salesforce Setup interface with a blue header. Below it, there's a section titled "Custom Tabs". A sub-section titled "Custom Object Tabs" is shown, with a "New" button highlighted by a red box. The text "No Custom Object Tabs have been defined" is displayed. Below this is another section titled "Web Tabs", also with a "New" button highlighted by a red box. The text "No Web Tabs have been defined" is displayed. The background of the main window has a decorative blue and white pattern.

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

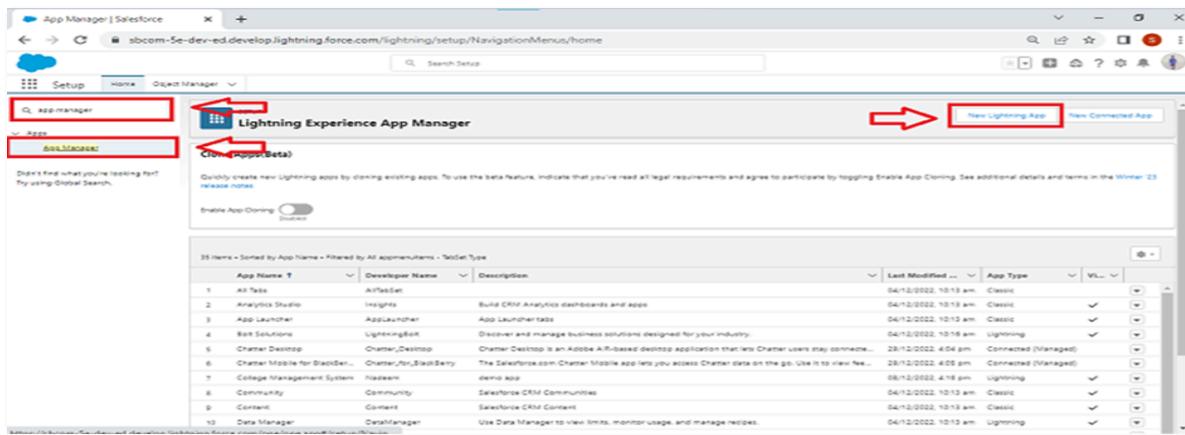
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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.



2. Fill the app name in app details and branding as follow
AppName: 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 * Upload

Primary Color Hex Value *

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

App Launcher Preview

Next

4. To Add Navigation Items:

Available Items Create Create ▾

Type to filter list...

Accounts
Alert Settings
All Sites
Alternative Payment Methods
Analytics
App Launcher

Selected Items

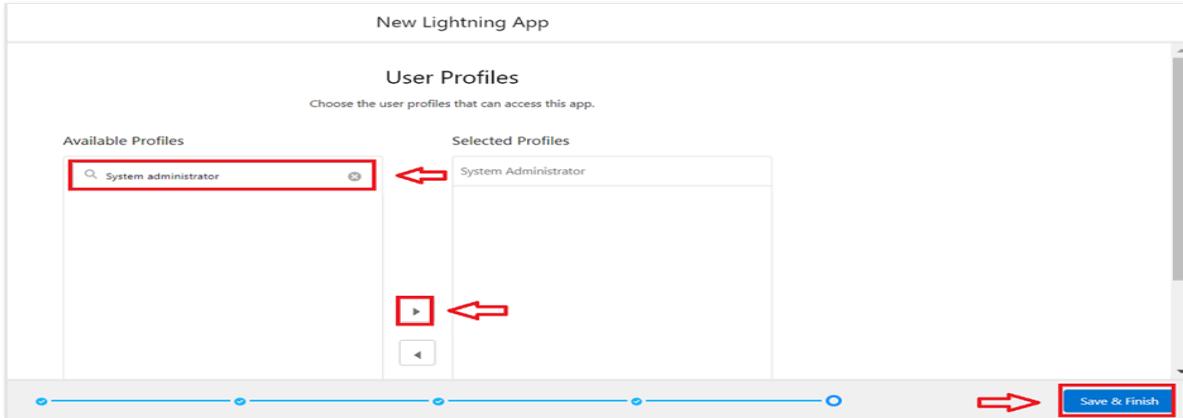
Employees
Projects
ProjectTasks
Assets
Asset Services
Reports
Dashboards

Next

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 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.

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 interface. At the top, there's a navigation bar with 'Setup' and 'Object Manager'. A red arrow points to the 'Object Manager' button. Below it, the main area is titled 'Object Manager' with a sub-header 'SETUP'. A search bar contains the text 'Employee', which is also highlighted with a red box and a red arrow pointing to it. The results table lists one item: 'Employee' (Label), 'Employee_c' (API Name), 'Custom Object' (Type), and '20/06/2023' (Last Modified). The 'Deployed' column shows a checkmark. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Employee	Employee_c	Custom Object		20/06/2023	✓

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

SETUP > OBJECT MANAGER
Employee

Details Fields & Relationships

Fields & Relationships

4 Items, Sorted by Field Label

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".

- Picklist** Allows users to select a value from a list you define.
- Picklist (Multi-Select)** Allows users to select multiple values from a list you define.
- Text** Allows users to enter any combination of letters and numbers.
- Text Area** Allows users to enter up to 255 characters on separate lines.
- Text Area (Long)** Allows users to enter up to 131,072 characters on separate lines.

4. Click on Next

Employee
New Custom Field

Step 2. Enter the details Step 2 of 4

Previous **Next** **Cancel**

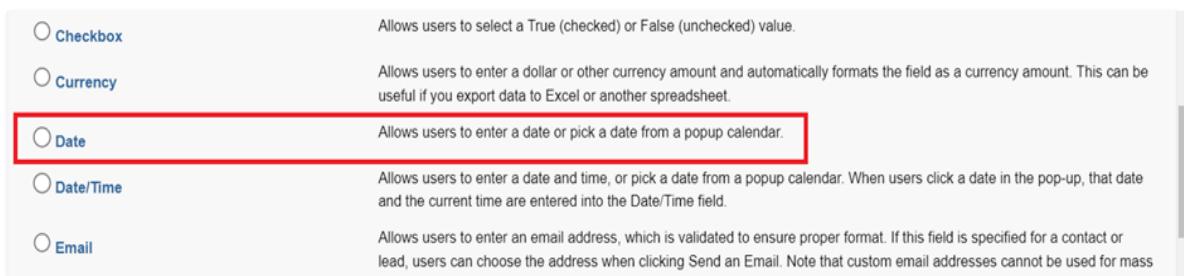
Field Label	Employee Name
Length	18
Field Name	Employee_Name
Description	<input type="text"/>

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.

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.



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

Field Label **Age** Field Name **Age**

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

Formula Return Type

None Selected

Checkbox

Currency

Date

Date/Time

Number

Select one of the data types below.

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

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

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

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

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

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 Age (Number) Insert Operator ▾

`YEAR(TODAY()) - YEAR(Date_of_Birth_c)`

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

Functions -- All Function Categories -- ▾

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

Previous Next Cancel

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: 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.

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

Step 2. Choose the related object Step 2

Select the other object to which this object is related.

Related To: Employee

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(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.

Activity 7 : Creating Remaining Fields in Employee Object

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

Sl No	Object Name	Field	
		Field Name	Data type
		1 Qualification	Text
		2 Address	Text Area
		3 Experience	Text Area

		4 Phone no	Phone
		5 Email	Email
		6 Joining date	Date
		7 Mode of Work	Picklist: Values On Site Remote
		8 Cab Allowance	Check box
		9 Food Allowances	Check box
		10 Wifi Allowances	Check box
1	Employee	11 Cab Allowance Amount	Currency
		12 Food Allowance Amount	Currency
		13 Wifi Allowance Amount	Currency
		14 Login Time	Time
		15 Logout Time	Time
		16 LinkedIn Profile	url
		Field Name	Data type

			1	Project Name	Text
			2	Project Lead	Text
			3	Start Date	Date
			4	End Date	Date
2	Project		5	Project Status	Picklist: Values Completed On Going Not Yet Started

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.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar has a search bar ('sharing settings') and a 'Sharing Settings' link under 'Security'. The main content area is titled 'Sharing Settings' and contains a table for 'Organization-Wide Defaults'. The 'Edit' button in the top right corner of this table is highlighted with a red box.

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.

The screenshot shows the 'Edit Organization-Wide Defaults' dialog. It lists various objects with their current sharing settings. The 'Employee' row is highlighted with a red box. The 'Save' button at the bottom is also highlighted with a red box.

Object	Default Internal Access	Default External Access
Work Type Group	Public Read/Write	Private
Asset	Public Read/Write	Private
Asset Service	Public Read/Write	Private
Employee	Private	Private
Project	Public Read/Write	Public Read/Write

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

Activity 2:

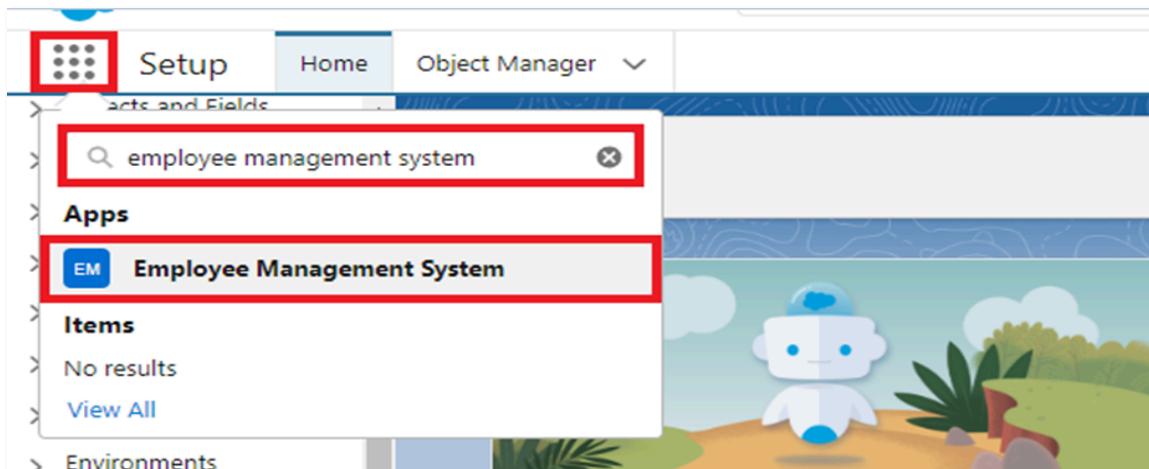
Set OWD as Private for Project and Asset Service objects.

User Adoption

Activity 1: Create a Record (Employee)

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

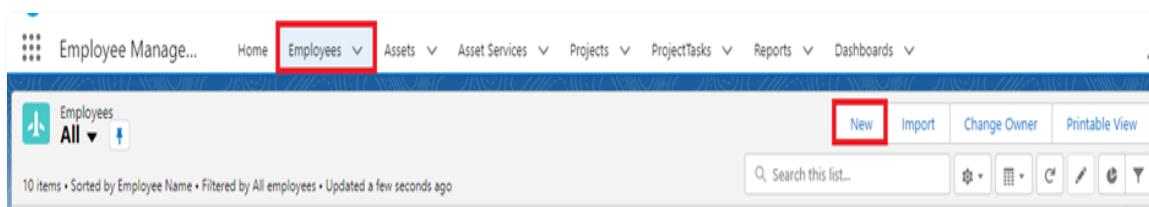
1. Search Employee Management System & click on it.



2. Click on the Employee tab.

3. Click

New.



4. 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 and save the file in CSV.

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

Data Import lets you upload data from external sources and combine it with data you collect via Analytics. You can then use Analytics to organize and analyze all of your 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.

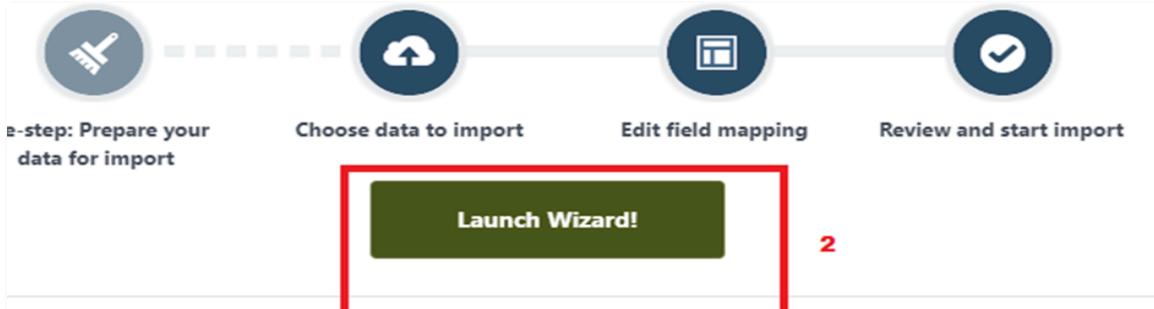
In order to complete this milestone, you need to create CSV files and give them data given in the picture below. After that from these CSV files we will import data for the Employee object.

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.

The screenshot shows the Salesforce Setup Home page. At the top, there's a search bar with "data impo" typed in. Below it, a red box highlights the "Data Import Wizard" link under the "Integrations" section. The main area features a "SETUP Home" banner with three decorative cards: one with a white robot, one with a smartphone, and one with a jungle scene. A "Create" button is in the top right corner.

3. Click Launch Wizard!



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

This screenshot shows the "Choose data" step of the wizard. It has tabs for "Let's do this", "Choose data", "Edit mapping", and "Start import". Under "Choose data", there's a list of objects: Customers, Employee (which is highlighted with a red box and labeled with a red number "3"), and Drivers.

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

Attendees

Buyers

What do you want to do? ?

Add new records

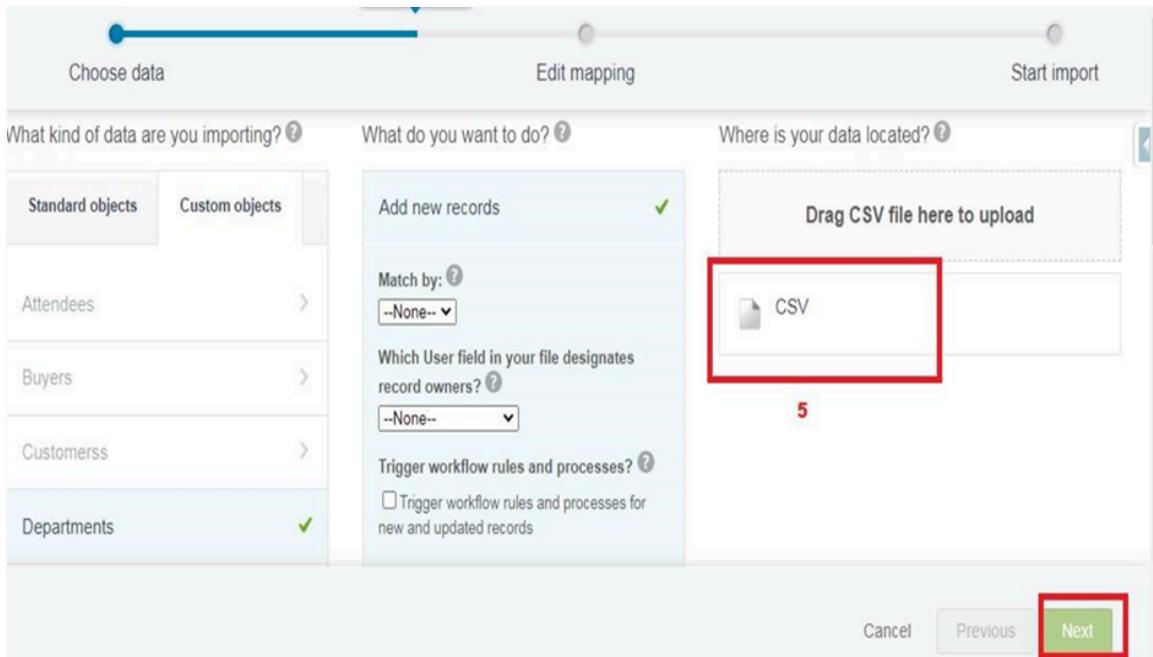
4

Update existing records

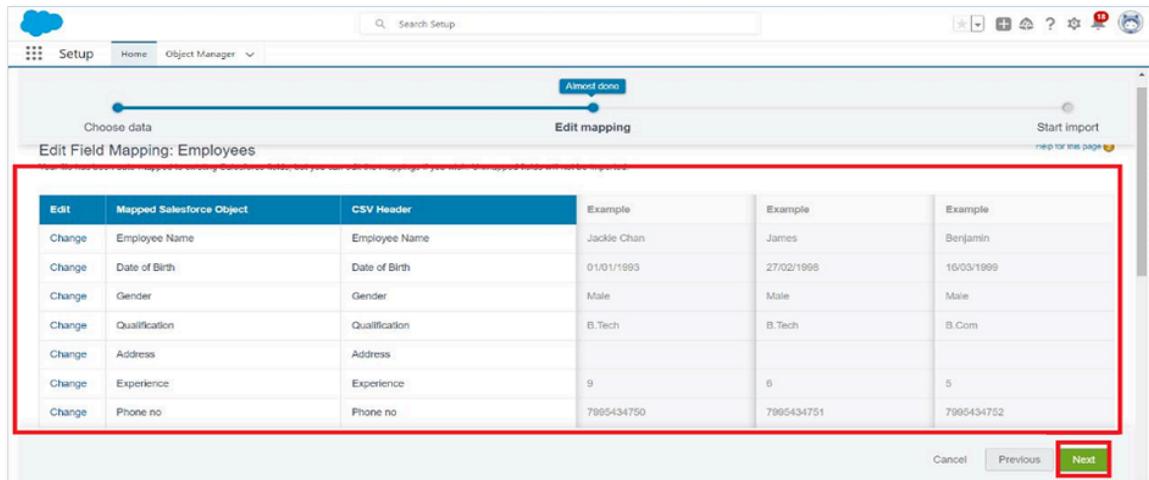
Add new and update existing records

Where is your data located? ?

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

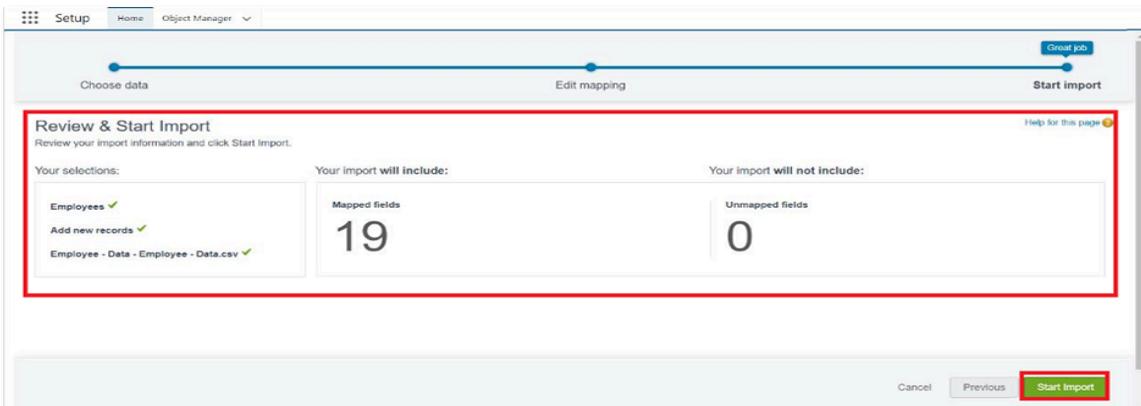


7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

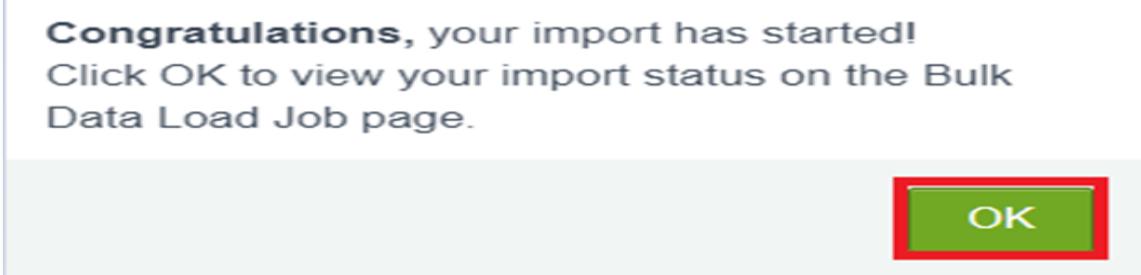


Note: no need to map “Reports to” field. The Data Import Wizard is designed to handle basic data import tasks and does not support mapping relationships between records.

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



9. Click OK on the popup.



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	Status Message	Status
View Request	View Result	751500000JeYH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	103	00	0	14	0	0	Completed	

Make sure 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.

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.

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	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.

	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	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

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.

2. Click on Expand All and click on add role

Q: roles

SETUP Roles

Users Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Executive Staff

CEO President CFO VP, Sales

Western Sales Director

Eastern Sales Director

International Sales Director

Set Up Roles

under whom this role works.



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

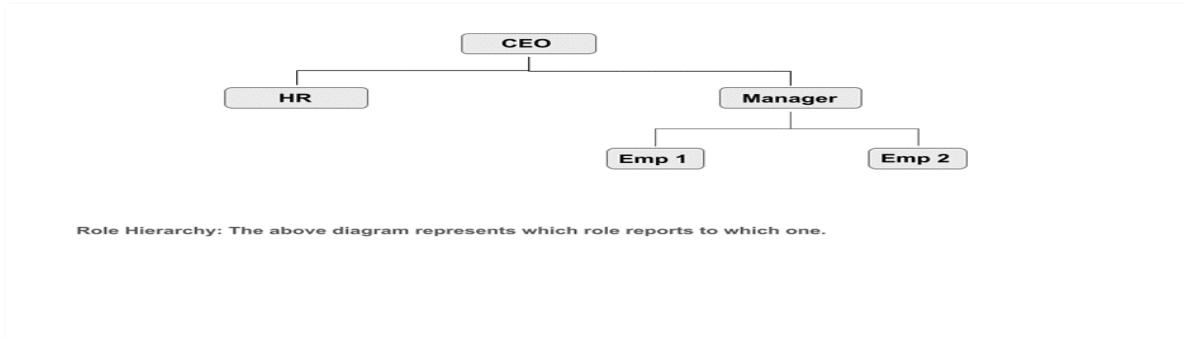
Role Name

This role reports to

Role Name as displayed on reports

Save Save & New Cancel

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



Activity 2: Creating more roles

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

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)

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 'New User' setup page in Salesforce. The 'General Information' section is filled out with the following values:

- First Name: Niklaus
- Last Name: Mikaelson
- Alias: nmika
- Email: nlarkin@MNwhite.com
- Nickname: Niklaus

The 'Role' field is set to HR. The 'User License' and 'Profile' fields are also set to HR. The 'Active' checkbox is checked. At the bottom of the page, there are several optional settings:

- Marketing User (unchecked)
- Offline User (unchecked)
- Knowledge User (unchecked)
- Flow User (unchecked)
- Service Cloud User (unchecked)
- Site.com Contributor User (unchecked)
- Site.com Publisher User (unchecked)
- WDC User (unchecked)
- Data.com User Type: -None-
- Data.com Monthly Addition Limit: Default Limit (300)
- Accessibility Mode (Classic Only): unchecked
- High-Contrast Palette on Charts: unchecked
- Load Lightning Pages While Scrolling: checked
- Debug Mode: unchecked

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.

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

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.

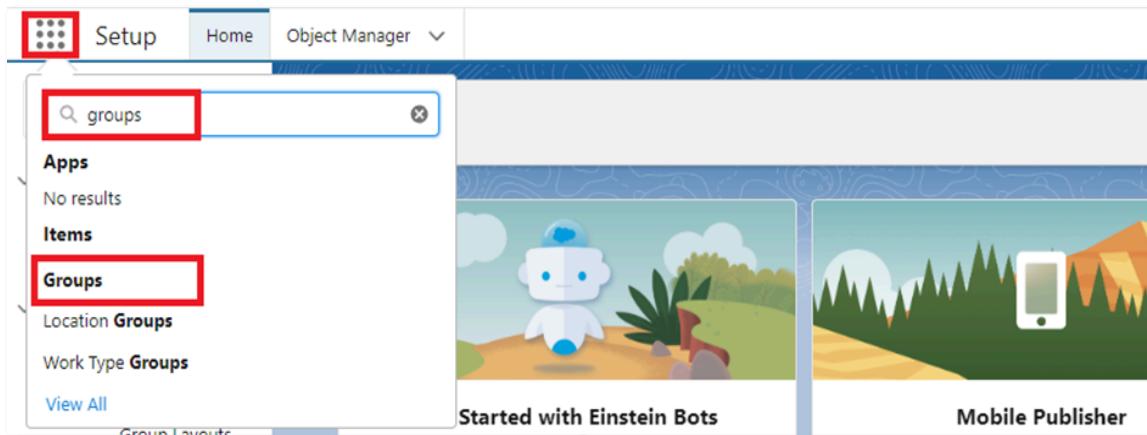
Chatter Group

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.

The screenshot shows the Salesforce Chatter Groups interface. At the top, there's a navigation bar with links for Home, Chatter, People, Groups, and Files. Below the navigation is a search bar labeled 'Search this list...' and a 'New' button highlighted with a red box. The main area displays a list of groups under the heading 'Recently Viewed'. The list includes columns for Name, Last Activity, Members, and Owner. A message at the top of the list says '0 items • Updated a few seconds ago'.

4. Fill in the new group information with these details:

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

This screenshot shows the 'New Group' dialog box. It has fields for 'Name' (containing 'Internal Discussion') and 'Description' (containing a placeholder text about COO requests). There are also sections for 'Information' (with font and style tools) and 'Cancel' and 'Save & Next' buttons.

This screenshot shows the 'New Group' dialog box with a red box highlighting the 'Access Type' section. It includes options like 'Private' and 'Broadcast Only'. Other visible fields include 'Group Email' (set to 'Employee Project'), 'Owner' (set to 'Employee Project'), and 'Disable automatic archiving' (unchecked). Buttons for 'Cancel' and 'Save & Next' are at the bottom.

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

Manage Members

Search People...

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

+ Add

Done

- Click Done.

Salesforce Chatter Home Chatter People Groups Files

Internal Discussion Private with Customers

Chatter Engagement

Post Poll Question Share an update... Share

Sort by: Most Recent Activity

Search this feed...

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.

Show More Information

Group Email: OF95:000000UZGpCAO@post.Si-diwaear.ap26.chatter.salesforce.com

Owner: Employee Project

Manage Members

- This is how your group interface looks like.
- 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.

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's a navigation bar with 'SETUP' and 'Object Manager'. A red box highlights the 'Object Manager' tab. Below the navigation is a search bar with 'Employee' typed in, also highlighted with a red box. The main area is titled 'Object Manager' and shows a table with one item: 'Employee'. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'Employee' row is highlighted with a red box. In the bottom right corner of the table area, there's a dropdown menu with 'Edit' and 'Delete' options, both highlighted with red boxes.

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

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

New Record Type
Employee

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	<input type="text" value="--Master--"/>
Record Type Label	<input type="text" value="On Site Employee"/>
Record Type Name	<input type="text" value="On_Site_Employee"/>
Description	<input type="text" value=""/>
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”.

SETUP > OBJECT MANAGER
Employee

Record Types
0 items. Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
No items to display.			

New New Page Layout Assignment

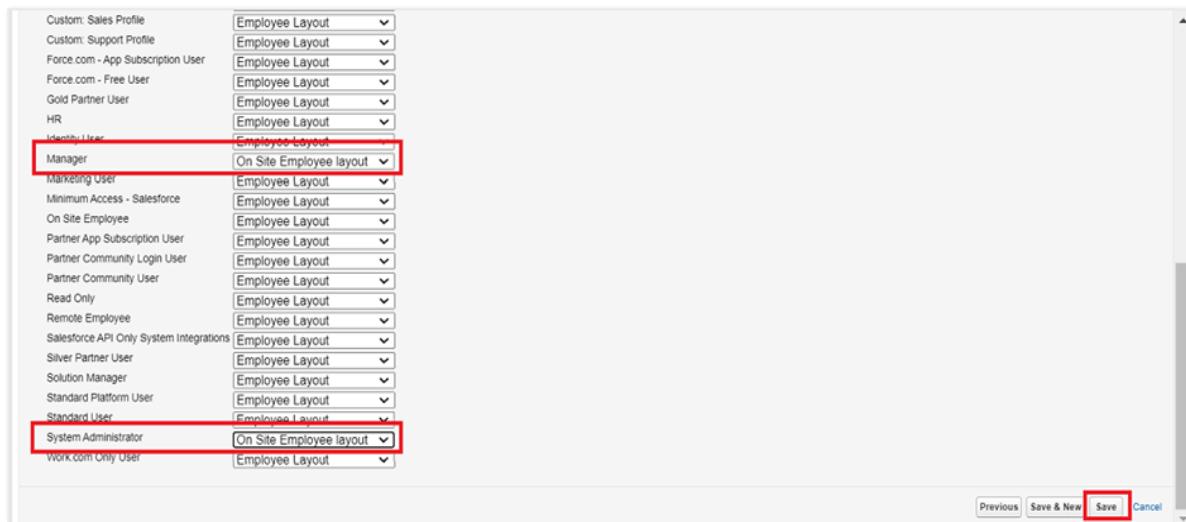
Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External 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.	
<input type="radio"/> Apply one layout to all profiles <input type="button" value="– Select Page Layout –"/> <input checked="" type="radio"/> Apply a different layout for each profile	
Profile:	Page Layout
Analytics Cloud Integration User	<input type="button" value="Employee Layout"/>
Analytics Cloud Security User	<input type="button" value="Employee Layout"/>



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

Setup Home Object Manager

Q. Permission sets

Users Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets ▾ | Edit | Delete | Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/> Action	Adding_Employees		
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and categories, ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer_Manager	Includes all Buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM_User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Commerce_Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact_Center_Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact_Center_Agent	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Other | All

--> Save.

SETUP Permission Sets

Permission Set Create

Enter permission set information

Save Cancel

Label: Per to Emp

API Name: Per_to_Emp

Description:

Session Activation Required

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

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

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

SETUP **Permission Sets**

Permission Set
Adding Employee

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

Permission Set Overview > Object Settings Employees

Employees Edit

Tab Settings

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

7. Now click on the Manage Assignment.

Setup Home Object Manager

Q. permission

Users

- Permission Set Groups
- Permission Sets**
- Custom Code
- Custom Permissions

... > SETUP > PERMISSION SET 'ADDING EMPLOYEE'
Adding Employee

Current Assignments Add Assignment

8. Click on Add Assignment.

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00d5i00000ewzcbea5.165fc3ee2or@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
demo project	dproj	nadeem@smart.com		<input checked="" type="checkbox"/>	System Administrator
Elijah Mikaelson	emika	elijah@smart.com	On Site Employee	<input checked="" type="checkbox"/>	On Site Employee
Integration User	integ	integration@00d5i00000ewzcbea5.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Jason Mikaelson	jmika	jason@smart.com	Remote Employee	<input checked="" type="checkbox"/>	Remote Employee
Kol Mikaelson	kmika	kol@smart.com	Manager	<input checked="" type="checkbox"/>	Manager
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

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 Reports page. At the top, there is a navigation bar with icons and links for Home, Employees, Assets, Asset Services, Projects, Project Tasks, Reports (which is highlighted with a red box), and Dashboards. Below the navigation bar is a search bar labeled "Search...". Under the "Reports" section, there is a "Recent" category with two items: "Employee's working on projects report" and "Assets assigned to Employees". There are also links for "Created by Me", "Private Reports", "Public Reports", and "All Reports". On the right side, there is another search bar for "Search recent reports..." and a "New Report" button, which is also highlighted with a red box. A "New Folder" button and a gear icon are also present.

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. On the left, there is a sidebar with a "Category" section containing "Recently Used" and "All" (which is selected). Below "All" are categories: Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, and Price Books, Products and Assets. In the center, there is a "Select a Report Type" panel with a search bar containing "employee". A list of report types is shown, with "Employees" selected and highlighted with a red box. To the right of the list is a "Details" panel for the "Employees" report type, which includes a "Start Report" button (also highlighted with a red box), a "Details" section (with "Created By You" and "Created By Others" subsections), and a "Fields (26)" section. At the bottom of the dialog, there is an "Owner" section.

4. Customize your report

--> Add fields from left pane as shown below

Employee	Employee Name	Employee ID	Reports to	Login Time	Logout Time	Mode of Work
Employee	A005-00000H75					LinkedIn Profile
Eng for Juniper Test	A005-00000H76Y			8:00 am	9:00 pm	LinkedIn Profile

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”.

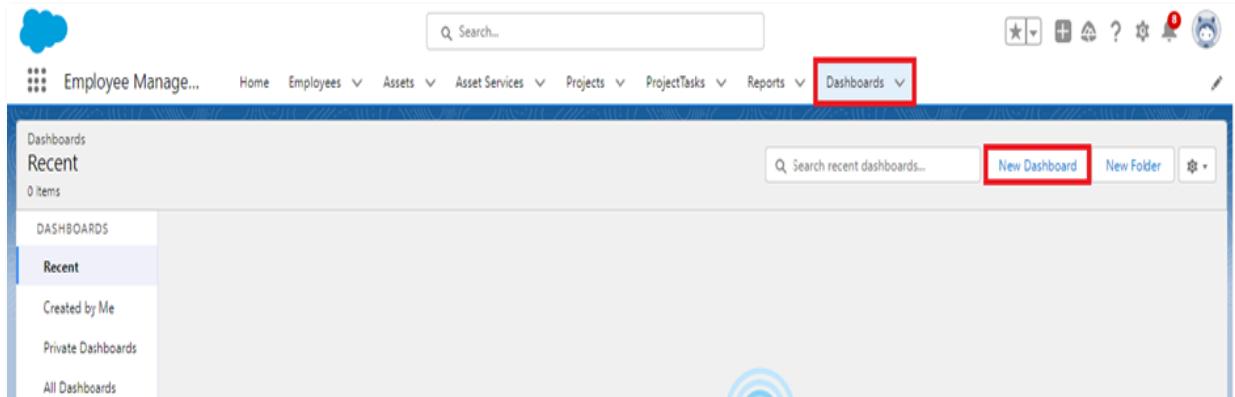
Dashboards

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 out 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

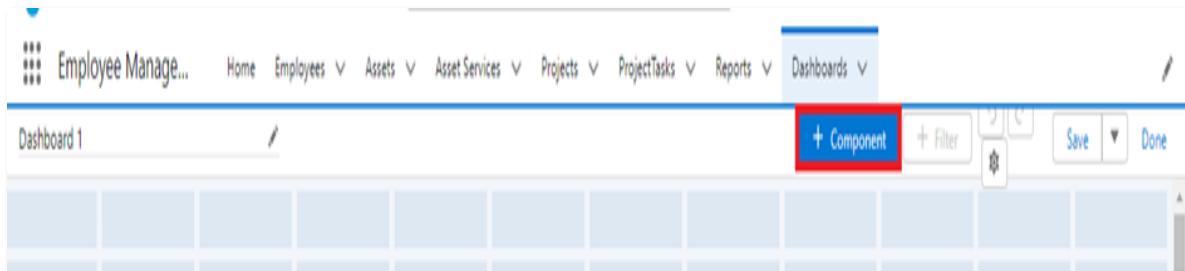
1. Go to the app --> click on the Dashboards tabs.



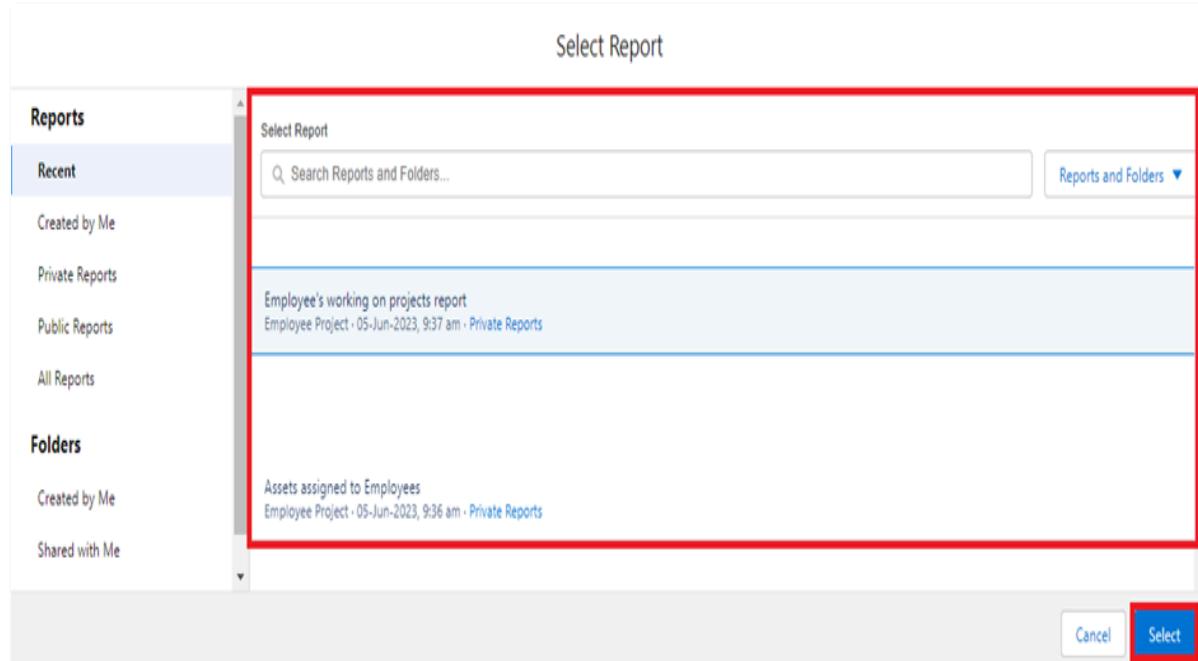
2. Give a Name and click on Create.

The screenshot shows the 'New Dashboard' dialog box. It has fields for 'Name' (containing 'Dashboard 1'), 'Description' (empty), 'Folder' (containing 'Private Dashboards'), and 'Select Folder' (button). At the bottom are 'Cancel' and 'Create' buttons, with 'Create' highlighted with a red box.

3. Select add component.



4. Select a Report and click on select.



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

Activity 2:

Create another Dashboard as we discussed in activity 1.