

## **PROJECT TITLE: Workforce Administration Solution (Dev)**

### **TEAM MEMBERS:**

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## 1. PROJECT OVERVIEW

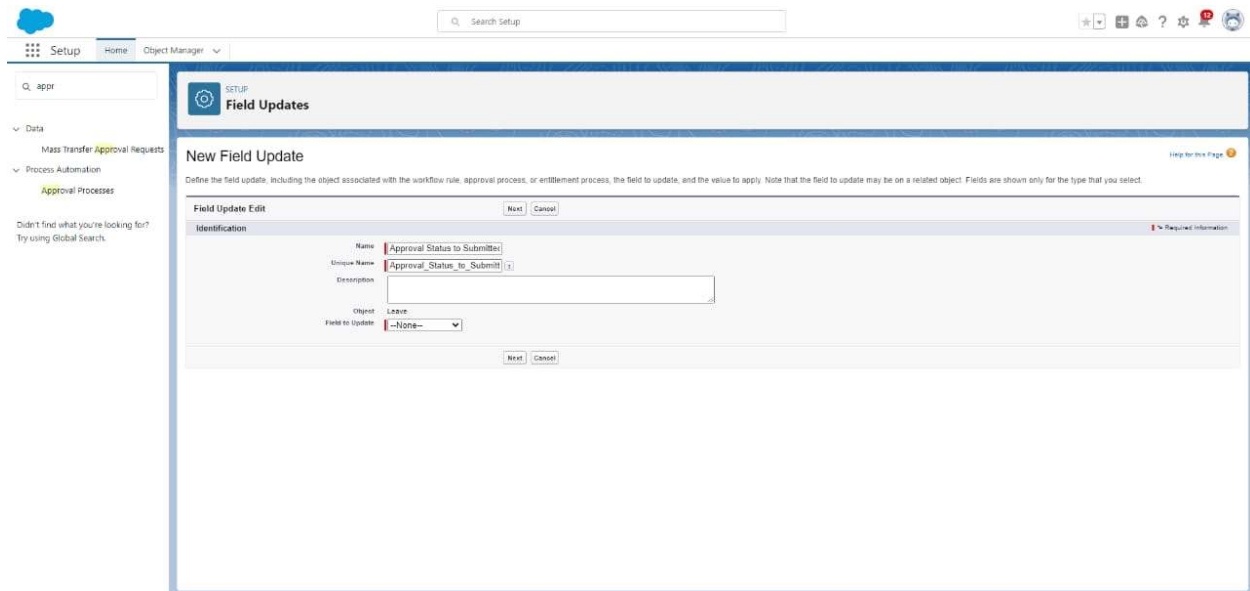
Workforce Administration Solution - Development Phase goal to develop a robust platform that streamlines and automates core HR functions, such as time tracking, payroll processing, employee scheduling, and compliance, while enhancing data accuracy and operational efficiency. Workforce administration solutions are software platforms designed to streamline and automate various human resource (HR) functions, including time and attendance tracking, scheduling, payroll processing, and compliance management.

## 2. OBJECTIVES

- **Business goal:**
  - Streamline time tracking, payroll, scheduling, and compliance management to reduce manual tasks, minimize errors, and increase efficiency within the HR department.
  - Streamline HR administration by automating time and attendance tracking, scheduling, and payroll processing.
  - Employee Self-Service Portal- Empower employees to manage their HR needs independently. Implementation: Provide a centralized portal for employees to view schedules, request leave, and access payroll information without requiring HR assistance.
- **Specific Outcomes:**
  - **Enhance Compliance and Reduce Risk:** Develop a solution that adheres to local and international labor laws, ensuring accurate tracking of work hours, overtime, and leave to avoid regulatory fines and maintain compliance.
  - **Improve Employee Experience and Empowerment:** Provide employees with a self-service portal for easy access to schedules, payroll information, and leave management, fostering greater transparency and engagement.
  - **Enable Data-Driven HR Decisions:** Integrate reporting and analytics capabilities to give HR teams insights into attendance trends, labor costs, and workforce productivity, supporting informed decision-making for workforce planning and management.

## 3. SALESFORCE KEY FEATURES AND CONCEPTS UTILIZED

This application platform with a broad range of features designed to help organizations manage customer relationships, streamline business processes, and enhance productivity. With its robust customization and integration capabilities, Salesforce adapts to diverse business needs across industries.



- **Data Management and Security**

- **Data Import Wizard and Data Loader:** Tools for importing, updating, and managing data within Salesforce.
- **Data Security:** Layers of security include object-level, field-level, and record-level security to protect sensitive data.
- **Roles and Profiles:** Define permissions at a user level, specifying what data users can view or edit based on their role.
- **Sharing Settings:** Enable or restrict data access between users based on criteria, such as organizational hierarchy or specific sharing rules .
- **Approval Processes:** Salesforce's built-in approval workflows help categorize clients based on predefined criteria, facilitating automated decision-making for property recommendations.

- **Process Automation Tools**

- **Workflow Rules:** Basic automation tool that triggers field updates, email alerts, tasks, or outbound messages based on specific criteria.
- **Process Builder:** Provides more advanced automation options than Workflow Rules, allowing admins to automate complex business processes and actions.
- **Flow Builder:** Offers sophisticated process automation through visual flows, enabling custom user interfaces, record creation, and updates based on user inputs or triggered events.

- **Personalized Communication:** By leveraging client data and status, Salesforce allows for customized messaging and interactions, tailored to each client's specific needs and approval status.

## 4. DETAILED STEPS TO SOLUTION DESIGN

Designing a solution in Salesforce involves careful planning, requirements gathering, system design, and collaboration with stakeholders to ensure the solution aligns with business needs and technical best practices.

Setup

Home

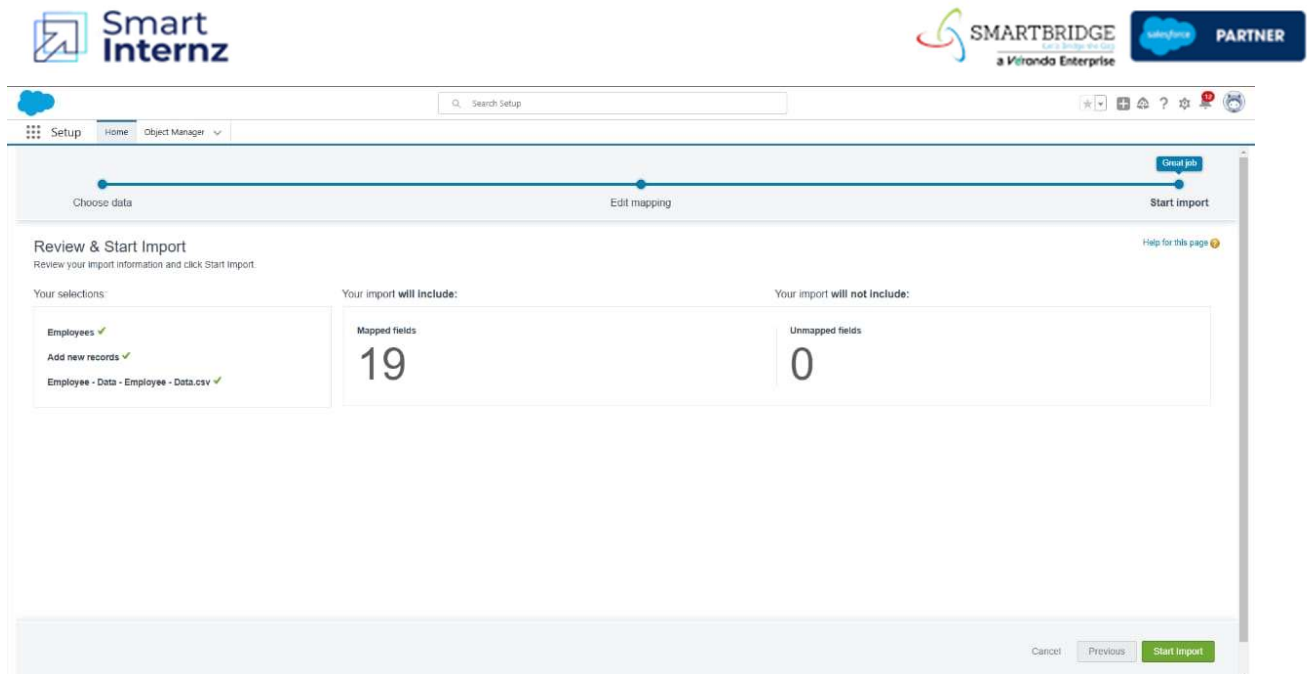
Object Manager

Search Setup

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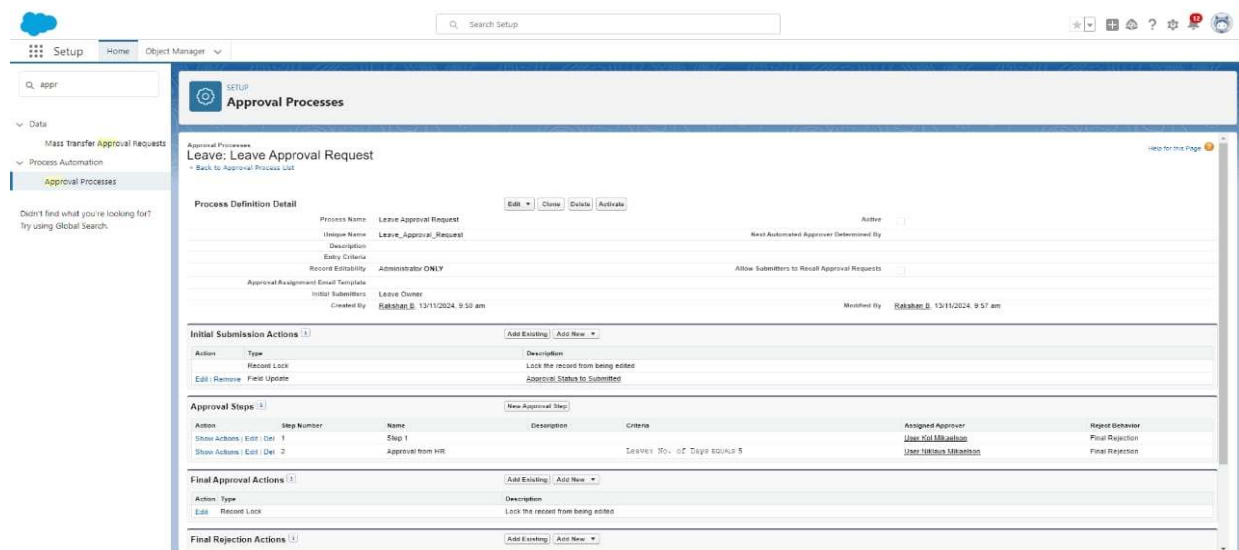
- **Process Automation Design:** Map Out Business Processes visualize each business process to determine automation opportunities (e.g., approvals, notifications).
- **Choose Automation Tools:** Decide between automation tools such as Workflow Rules, Process Builder, Flow, and Apex for custom logic.
- **Define Criteria and Actions:** Specify when and how automations should trigger (e.g., status updates, field changes) and what actions they should perform.
- **User Interface Designs:** Page Layouts Customize page layouts based on user roles and departments to streamline the user experience Lightning App Builder Use Lightning components and custom page layouts for a dynamic, responsive interface.
- **Business Logic:** Implemented business logic includes automated record creation and a streamlined approval process, enhancing the consistency and accuracy of client categorization and property recommendations.

These steps contributes to a well-rounded Salesforce solution design that meets business requirements, supports user needs, and integrates with the existing technology landscape.



## 5. TESTING AND VALIDATION

Testing and validation are critical stages in Salesforce solution development, ensuring that the solution is stable, functional, and meets business requirements before deployment.

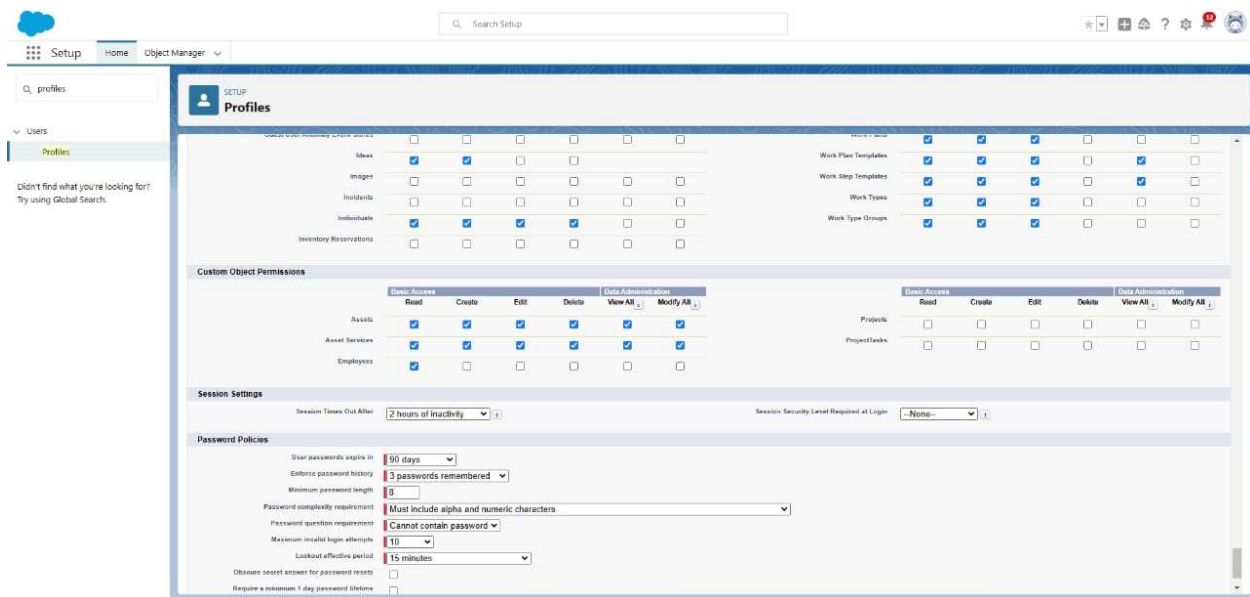


- **Unit Testing:** To test individual components and configurations in isolation to ensure they function correctly Scope Test elements like custom fields, validation rules, formula fields, workflows, and triggers.
- **Integration Testing:** To confirm that Salesforce integrations with external systems work as expected and data flows seamlessly Test all data connections and integrations, including

APIs, Salesforce Connect, middleware, and any third-party applications connected to Salesforce.

## 6. KEY SCENARIOS ADDRESSED BY SALESFORCE IN THE IMPLEMENTATION PROJECT

In a Salesforce implementation project, key business scenarios are identified and addressed to ensure the system aligns with specific organizational needs and processes.

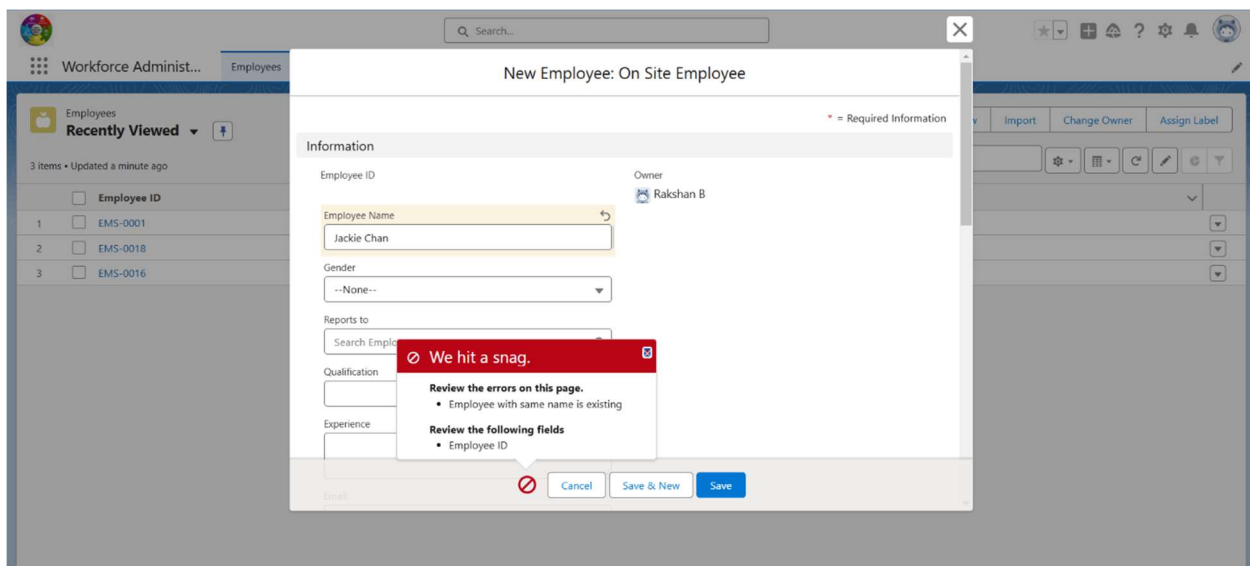


- Lead Management and Conversion:** Sales reps need to efficiently manage new leads and convert them into qualified opportunities. Salesforce helps capture, assign, and prioritize leads automatically. Conversion processes streamline movement from Lead to Account, Contact, and Opportunity records.
- Opportunity and Sales Pipeline Management :** Sales teams require a clear view of sales pipelines to prioritize high-potential deals, track progress, and forecast revenue. Salesforce's Opportunity Management allows sales teams to manage deal stages, track related tasks, and collaborate with other departments.
- Field Service Management :** Field service teams require efficient scheduling, dispatch, and real-time access to customer data while on-site. Salesforce Field Service enables scheduling and dispatch of field technicians with mobile access to customer records, service history, and job details. This improves efficiency, reduces travel time, and enhances customer experience through timely service.

- **Employee Self-Service and HR Case Management :** Employees need an easy way to manage HR requests, access benefits, and track personal information. Salesforce Employee Experience Cloud provides self-service portals for HR case management, employee onboarding, and access to HR resources

## 8. OUTPUT

The Salesforce implementation project successfully delivered a robust, scalable solution tailored to address the organization's unique requirements.



## 7. CONCLUSION

### Summary of Achievements:

This Workforce Administrator (DEV) Ultimately, Salesforce's comprehensive suite of tools, combined with effective testing, validation, and a carefully planned solution design, ensures that organizations can maximize their return on investment while achieving improved productivity, customer satisfaction, and business growth. By addressing critical business scenarios such as lead management, case resolution, sales forecasting, and compliance, Salesforce provides an adaptable solution that scales with an organization's needs.