

# WORKFORCE ADMINISTRATION SOLUTION



*Workforce Empowerment Hub*

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## **Abstract**

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

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

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

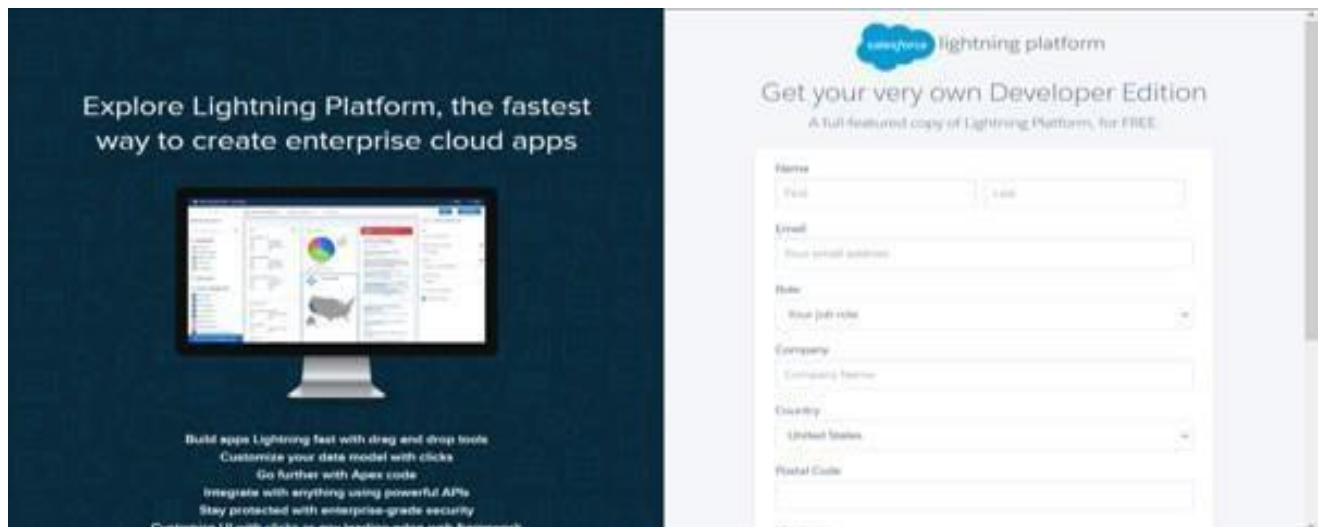
# INDEX PAGE

TOPICS	PAGES
1.Creation salesforce org	01-02
2.Object	03-08
3.Tabs	09-11
4. The Lightning App	12-13
5.Fields & Relationships	14-15
6.Setting OWD	16-18
7.User Adoption	19-20
8.Import Data	21-22
9.Profiles	23-24
10.Roles	25-26
11.Users	27-28
12. Page Layouts	28-31
13. Chatter Groups	32-35
14. Record Types	36-38
15.Permission Sets	39-40
16. Reports	41-42
17. Dashboards	43-44

# 1. Creating a Developer Account in Salesforce

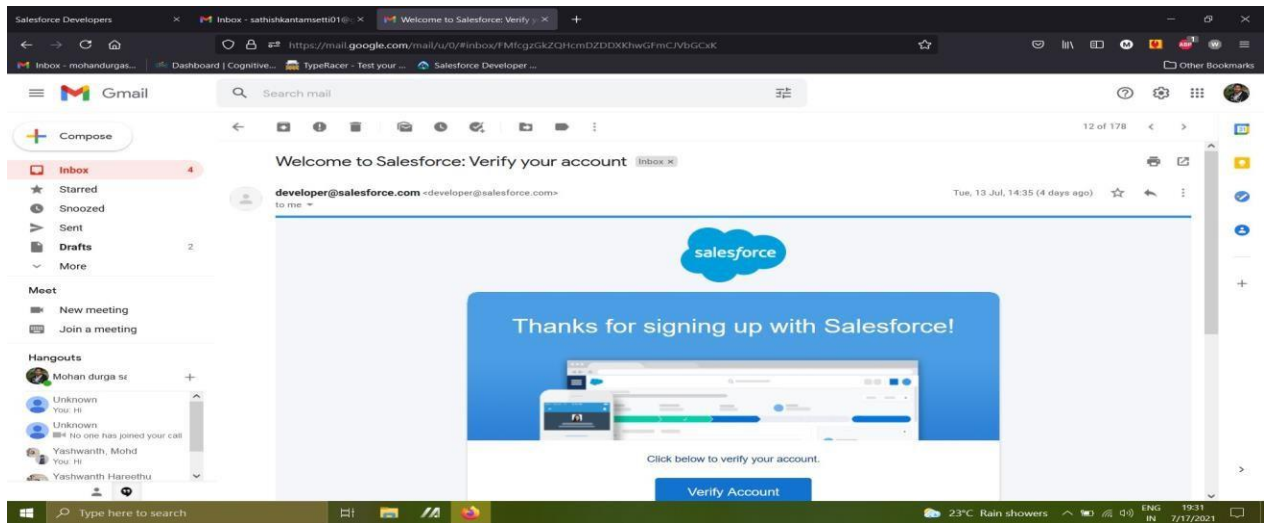
## Step 1: Sign Up for a Developer Org

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



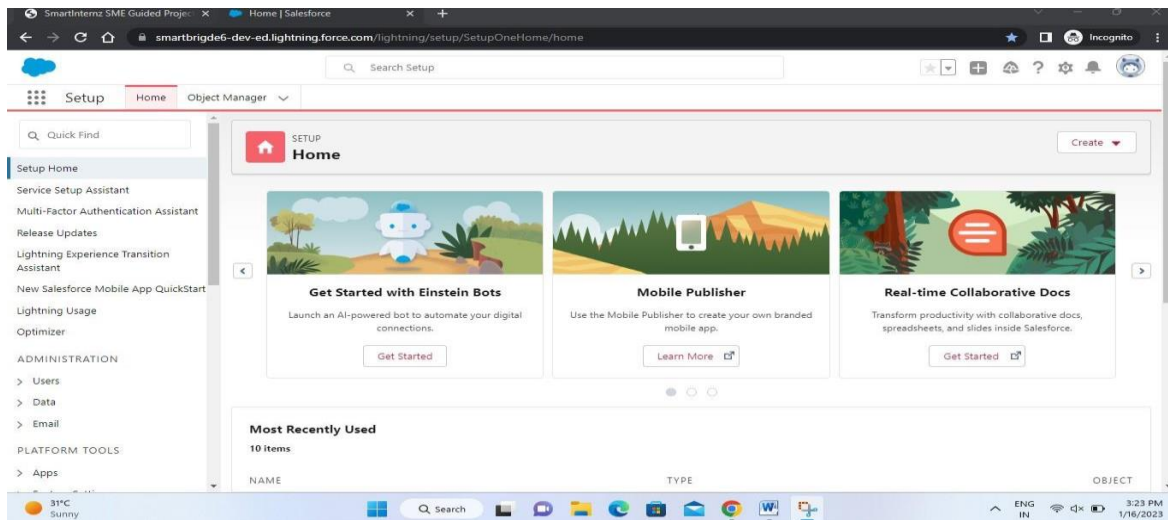
## Step 2: Account Activation

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



### Step 3: Login to Your Salesforce Account

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



## 2. Salesforce Objects

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

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

### 2.1. Creating Employee custom object

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

#### Step 1: Access Setup

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

#### Step 2: Open Object Manager

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

#### Step 3: Create a Custom Object

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

#### Step 4: Create "Employee" Object

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

- **Record Name:** Employee
- 2. **Check the following boxes:**
  - **Allow Reports**
  - **Allow Search**
- 3. **Click "Save"** to create the object.

## **Step 5: Create a Custom Tab for "Employee"**

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

## **2.2. Creating the Project Object**

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

### **Step 1: Access Setup**

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

### **Step 2: Open Object Manager**

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

### **Step 3: Create a Custom Object**

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

## Step 4: Create "Project" Object

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

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

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

## 2.3. Creating the Project Task Object

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

### Step 1: Access Setup

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

### Step 2: Open Object Manager

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

### Step 3: Create a Custom Object

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

### Step 4: Create "Project Task" Object

1. On the **Custom Object Definition** page, enter the following details:
  - **Label:** Project Task



- **Plural Label:** Project Tasks
  - **Record Name:** Project Task
2. **Check the following boxes:**
    - **Allow Reports**
    - **Allow Search**
  3. **Click "Save"** to create the object.

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

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

## **2.4. Creating the Asset Object**

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

### **Step 1: Access Setup**

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

### **Step 2: Open Object Manager**

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

### **Step 3: Create a Custom Object**

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

### **Step 4: Create "Project Task" Object**

4. On the **Custom Object Definition** page, enter the following details:
  - **Label:** Asset
  - **Plural Label:** Assests
  - **Record Name:** Asset
5. **Check the following boxes:**
  - **Allow Reports**
  - **Allow Search**
6. **Click "Save"** to create the object.

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

6. Click the **"Home" tab** and enter "Tabs" in the Quick Find search bar.
7. Select **"Tabs"** from the search results.
8. Under **Custom Object Tabs**, click **New**.
9. For **Object**, select **Asset**.
10. For **Tab Style**, select any icon that represents your object.

## 2.5. Creating the "Asset Service" Object

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

### Step 1: Access Setup

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

### Step 2: Open Object Manager

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

### Step 3: Create a Custom Object

5. On the **Object Manager** page, look to the right side of the screen.
6. Click on the **"Create"** dropdown and select **Custom Object**.

### Step 4: Create "Asset" Object

7. On the **Custom Object Definition** page, enter the following details:
  - **Label:** Asset Service
  - **Plural Label:** Asset Services
  - **Record Name:** Asset Service
8. Check the following boxes:
  - **Allow Reports**
  - **Allow Search**
9. Click **"Save"** to create the object.

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

11. Click the **"Home" tab** and enter "Tabs" in the Quick Find search bar.
12. Select **"Tabs"** from the search results.
13. Under **Custom Object Tabs**, click **New**.

14. For **Object**, select **Asset Service**.
15. For **Tab Style**, select any icon that represents your object.

### 3.The Lightning App

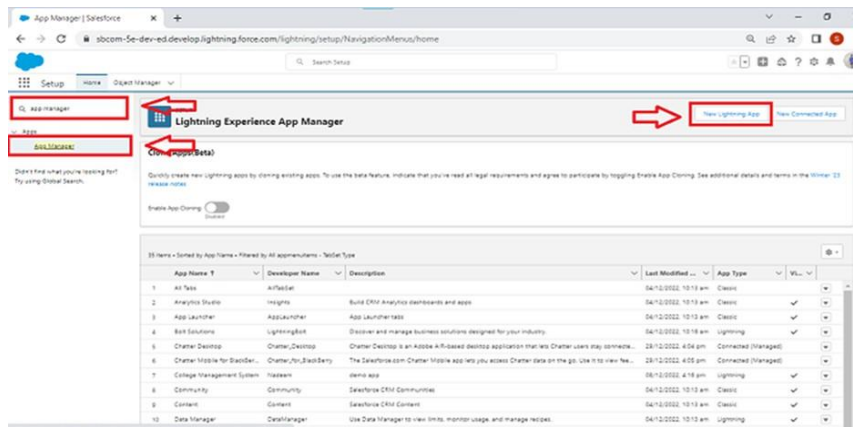
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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

#### Create a Lightning App

To create a lightning app page:

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



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

App Name : Workforce Administrator Solution

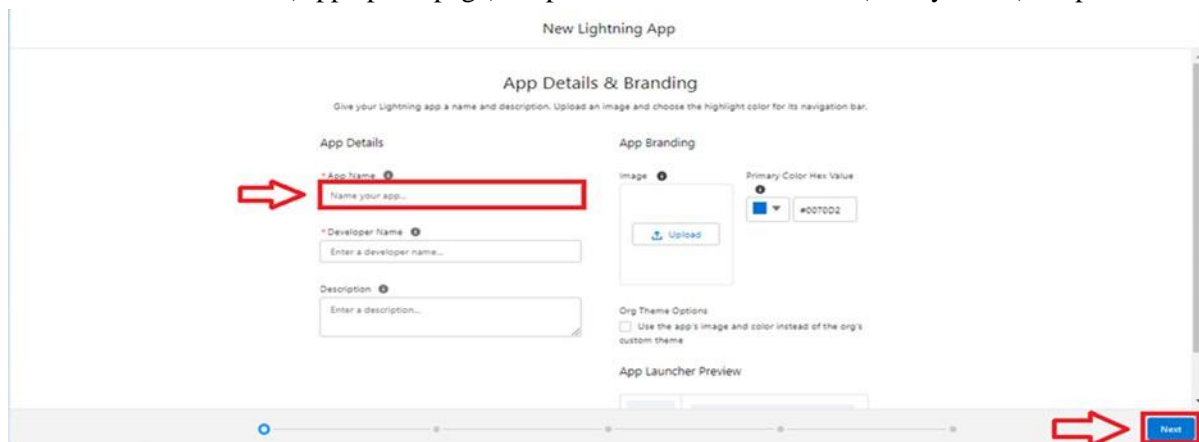
Developer Name : this will auto populated

Description : Give a meaningful description

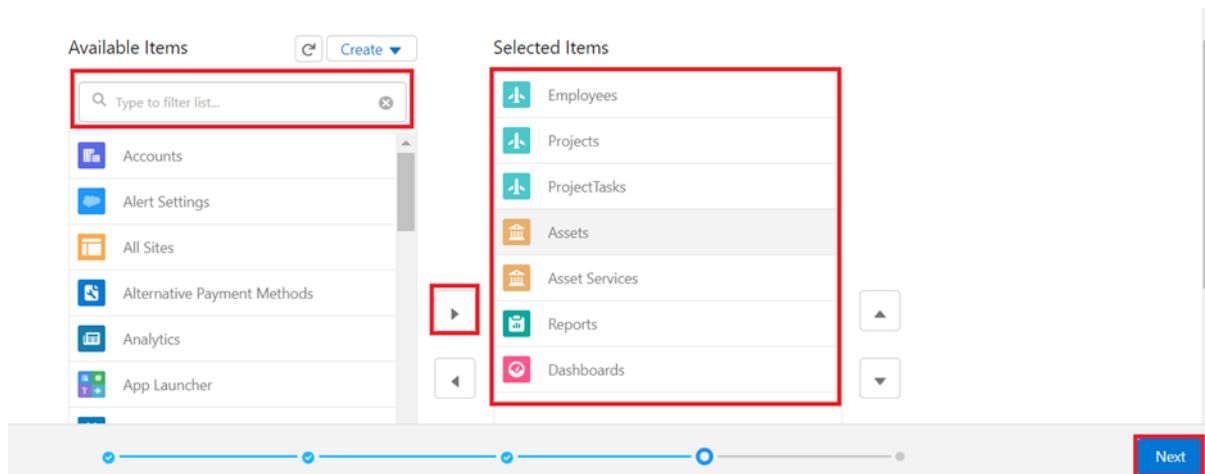
Image : optional (if you want to give any image you can otherwise not mandatory)

Primary color hex value : keep this default

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



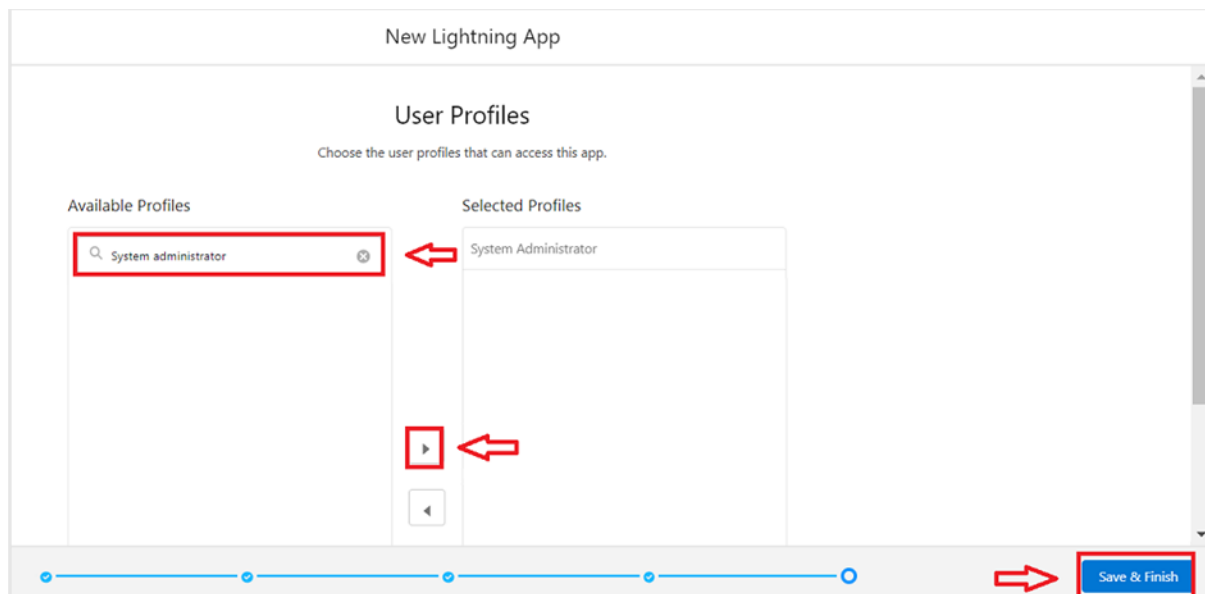
4. To Add Navigation Items:



Search the items in the search bar(Employees, Projects, ProjectTask, Assets, Asset Services, Reports, Dashboard) from the search bar and move it using the arrow button --> Next.

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

## 5. To Add User Profiles:



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

## 4. Fields & Relationships

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

Types of Fields

1. Standard Fields
2. Custom Fields

### Standard Fields:

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

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

### Custom Fields:

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

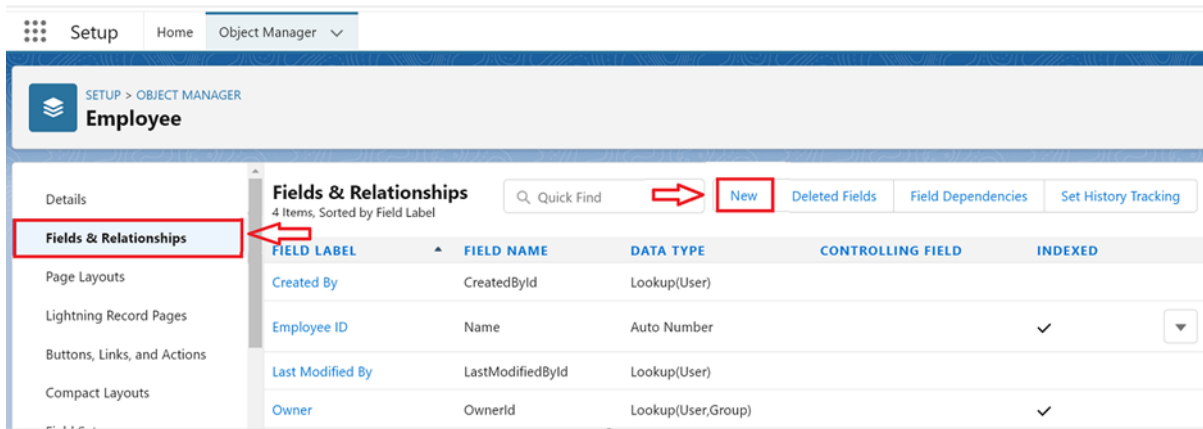
### Creating Text Field in Employee Object

To create fields in an object:

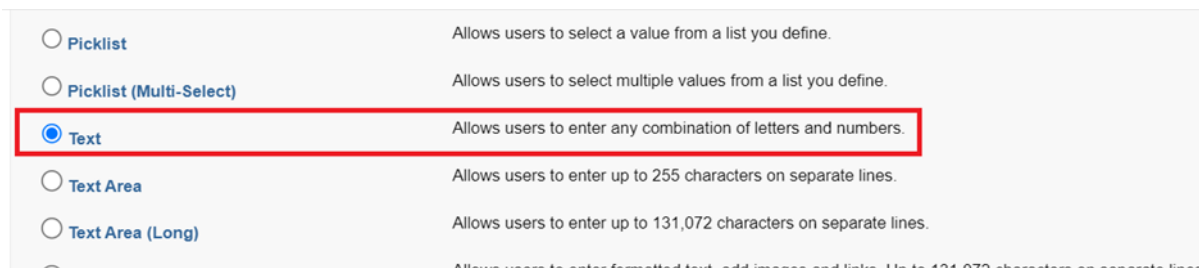
1. Go to setup --> click on Object Manager --> type object name(Employee) in quick find bar --> click on the object.



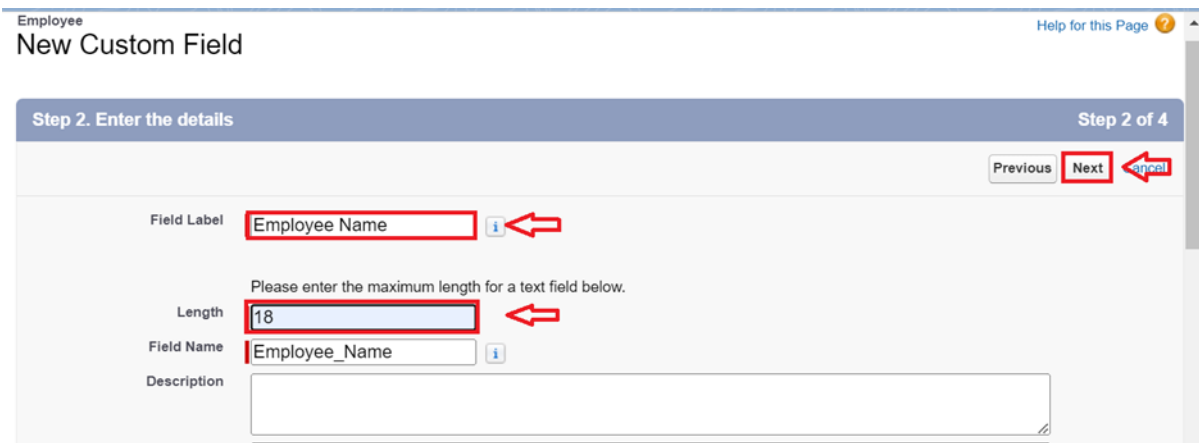
2. Now click on "Fields & Relationships" --> New



3. Select Data type as "Text".



4. Click on Next



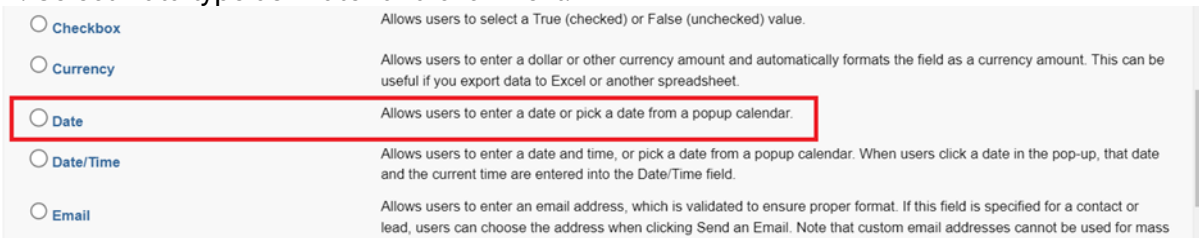
5. Fill the above as following:

- 1 Field Label: Employee Name
- 2 Length : 18
- 3 Field Name : gets auto generated
- 4 Click on Next --> Next --> Save and new.

### Creating Date of Birth Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1

2. Select Data type as "Date" and click Next.



3. Click on Next.
4. Fill the above as following:
  - a. Field Label: Date of Birth.
  - b. Field Name : gets auto generated.
  - c. Click on Next --> Next --> Save and new.

### Creating Formula Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as "Formula" and click Next.
3. Give Field Label and Field Name as "Age" and select formula return type as "Number" and click next.

Step 2. Choose output type

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

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

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

Insert Operator

Age (Number) =

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

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

Description

Quick Tips

- Getting Started
- Operators & Functions

Functions

-- All Function Categories --

ABS

ACOS

ADDMONTHS

AND

ASCII

ASIN

Insert Selected Function

### 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

Previous **Next** Cancel

Field Label:

Values:

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

☐ 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:

Description:

Help Text:

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

### Creating Self-Relationship Field in Employee Object

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

Employee  
New Relationship

Help for this Page

Step 2. Choose the related object Step 2

Previous Next Cancel

Select the other object to which this object is related.

Related To:

Previous **Next** Cancel

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

### Creating Master-Detail Relationship between Employee & Asset Object

To Create a Master-Detail relationship

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

### Creating Remaining Fields in Employee Object

Repeat the above steps to create many fields.

## 5. Setting OWD

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

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

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

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

### Create OWD Setting

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

The screenshot shows the Salesforce Setup page for Sharing Settings. The left sidebar has a search bar with 'sharing settings' and a 'Security' section with 'Sharing Settings' highlighted. The main content area has a 'Sharing Settings' header and a description. Below this is a dropdown for 'Manage sharing settings for: All Objects'. There is a 'Disable External Sharing Model' button. The 'Default Sharing Settings' section contains a table for 'Organization-Wide Defaults' with an 'Edit' button highlighted.

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

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

Work Type Group	Private	Private	
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 <input checked="" type="checkbox"/> <a href="#">i</a>		Manual User Record Sharing <input type="checkbox"/> <a href="#">i</a> Manager Groups <input type="checkbox"/> <a href="#">i</a>	
<b>Save</b>		Cancel	

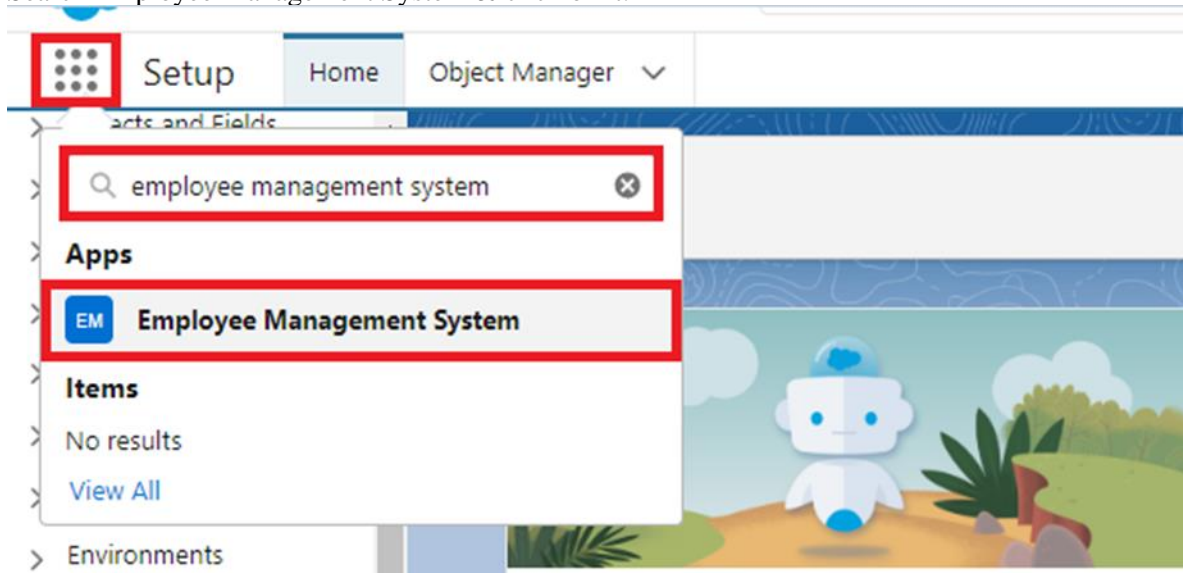
6. This Setting is for all the Users Which have been Created.  
**Set OWD as Private for Project and Asset Service objects.**

## 6.User Adoption

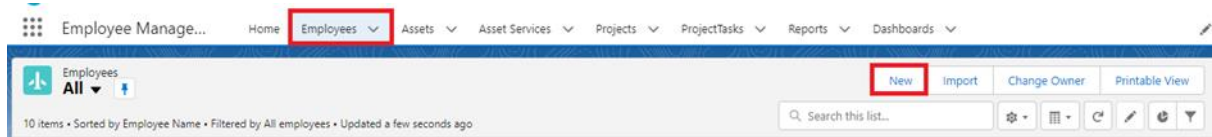
As a new Administrator, I perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more.

### Create a Record (Employee)

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



3. Click on the Employee tab.
4. Click New.



5. Fill the Details and click on Save.

### View a Record (Employee)

1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.
3. Click on the Employee Tab.
4. Click on any record name. you can see the details of the Employee

### Delete a Record (Employee)

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

## 7. Import Data

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

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

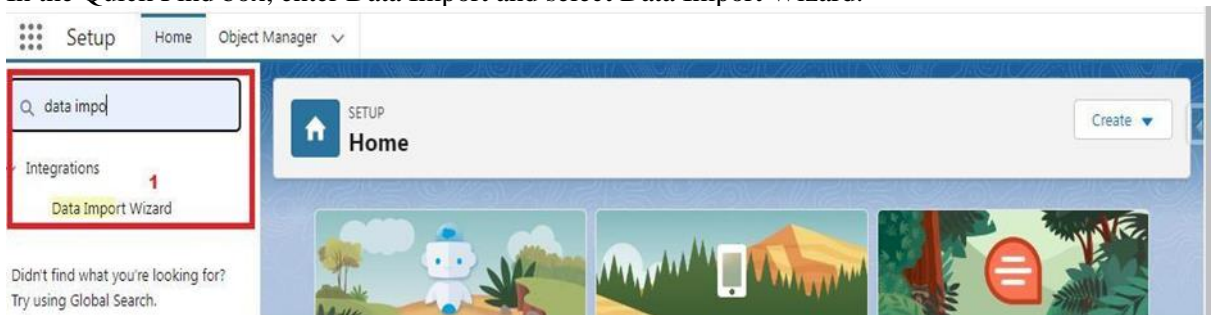
Data Import lets to upload data from external sources and combine it with data you collect via Analytics.

Use Analytics to organize and analyze all data in ways that better reflect your business.

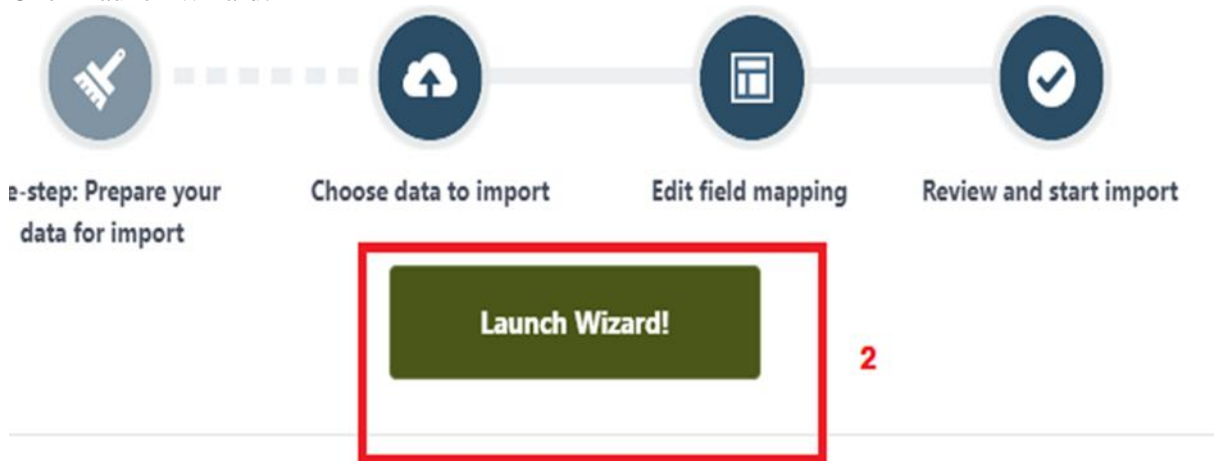
The Data Import Wizard is a Tool makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects.

### Importing data using Data Wizard

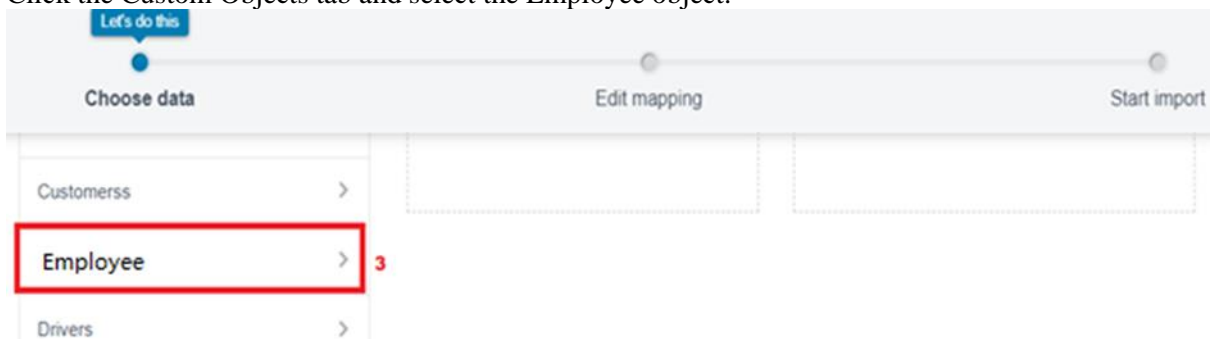
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



3. Click Launch Wizard!



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



5. Select Add new records.

## 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.

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

Almost done

Choose data Edit mapping Start import

Edit Field Mapping: Employees

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Employee Name	Employee Name	Jackie Chan	James	Benjamin
Change	Date of Birth	Date of Birth	01/01/1993	27/02/1998	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	6	5
Change	Phone no	Phone no	7995434750	7995434751	7995434752

Cancel Previous Next

Note: no need to map "Reports to" field. The Data Import Wizard is designed to handle basic data import tasks and

does not support mapping relationships between records.

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

Setup Home Object Manager

Choose data Edit mapping Start import

Great job

### Review & Start Import

Review your import information and click Start Import.

Help for this page

Your selections:

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

Your import will include:

Mapped fields

19

Your import will not include:

Unmapped fields

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.

OK

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

Batches										
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count
<a href="#">View Request</a>	<a href="#">View Result</a>	751500000JeYH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	100	60	0	14	0	0
								State Message		Status
										Completed

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





4. Scroll down and Click on Save.

### **Manager Profile**

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (Salesforce Platform User) --> enter profile name (Manager) --> Save.

2. While still on the profile page, then click Edit.

3. Scroll down to Custom Object Permissions and Give access permissions for Employee, Project and Project Task objects.

4. Scroll down and Click on Save.

### **Create Employee Profile**

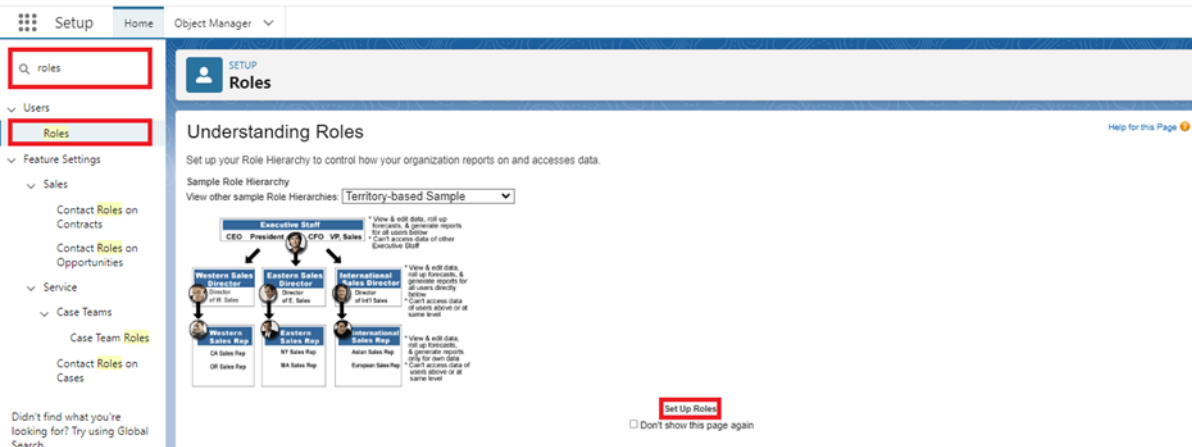
Create Employee Profiles for “On Site Employee”, “Remote Employee” as in above, but in step 3 only allow permission access for Project and Project Task objects only.

## 9.Role

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

### Creating HR Role

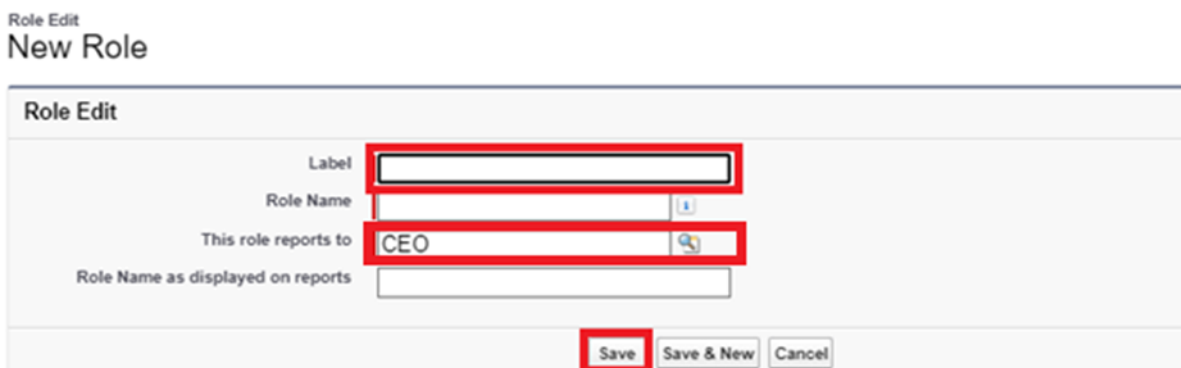
1. Go to quick find --> Search for Roles --> click on set up roles.



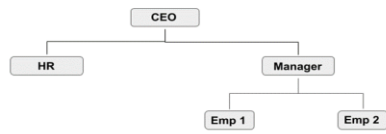
2. Click on Expand All and click on add role under whom this role works.



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



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



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

## Creating more roles

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

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

## 10.Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access. Each user account contains at least the following:

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

### Create User

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

SETUP  
Users

### New User

User Edit Save Save & New Cancel

General Information

First Name: Niklaus  
Last Name: Mikaelson  
Alias: nmika  
Email: nlarkin@MNwhite.com  
Username: nlarkin@MNwhite.com  
Nickname: Niklaus  
Title:   
Company:   
Department:   
Division:

Role: HR  
User License: Salesforce  
Profile: HR  
Active: ☒  
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: --None--  
Data.com Monthly Addition Limit: Default Limit (300)  
Accessibility Mode (Classic Only): ☐  
High-Contrast Palette on Charts: ☐  
Load Lightning Pages While Scrolling: ☒  
Debug Mode: ☐

3. Save.

### **Creating another user**

1. Go to setup --> type users in quick find box --> select users --> click New user.

2. Fill in the fields

- 1 First Name : Kol
- 2 Last Name : Mikaelson
- 3 Alias : Give a Alias Name
- 4 Email id : Give your Personal Email id
- 5 Username : Username should be in this form: text@text.text
- 6 Nick Name : Give a Nickname
- 7 Role : Manager
- 8 User license : Salesforce Platform
- 9 Profiles : Manager

3. Save.

### **Creating more users**

Create two more users as we created in above.

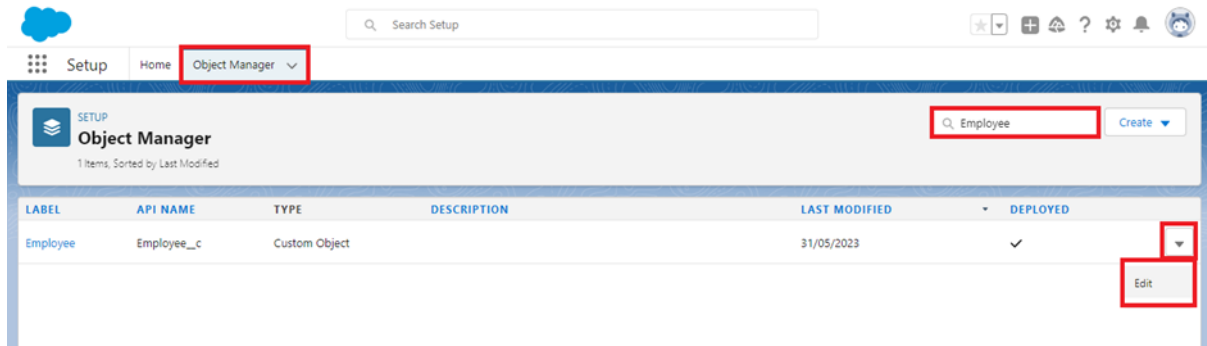
## 11. Page layouts

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

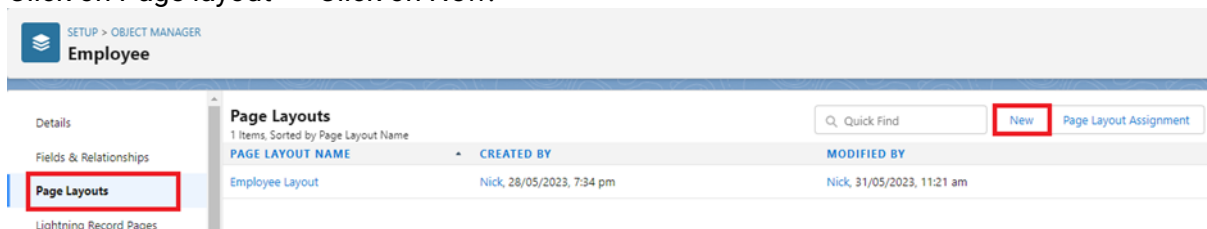
### creating a page layout for Employee object

To Create a Page layout:

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

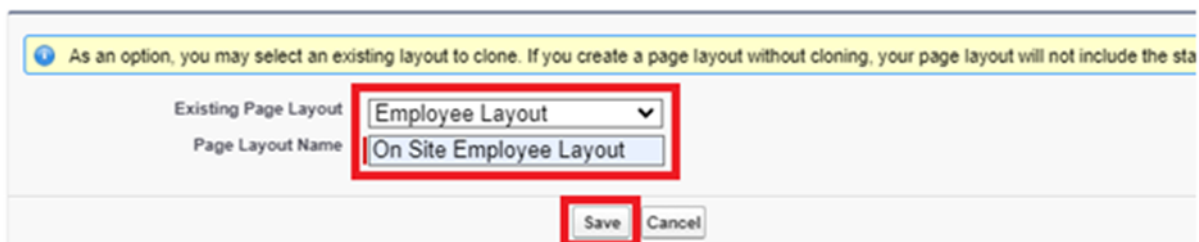


2. Click on Page layout --> Click on New.



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

### Create New Page Layout



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

### Creating another page layout

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

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

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

Quick Find
Field Name
Section
Blank Space

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

Information (Header visible on edit only)

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

Personal Information

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

Allowances

Cab Allowance	<input checked="" type="checkbox"/>	Cab Allowance Amount	₹123.45
Food Allowances	<input checked="" type="checkbox"/>	Food Allowance Amount	₹123.45

System Information (Header visible on edit only)

7. Click Save.

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

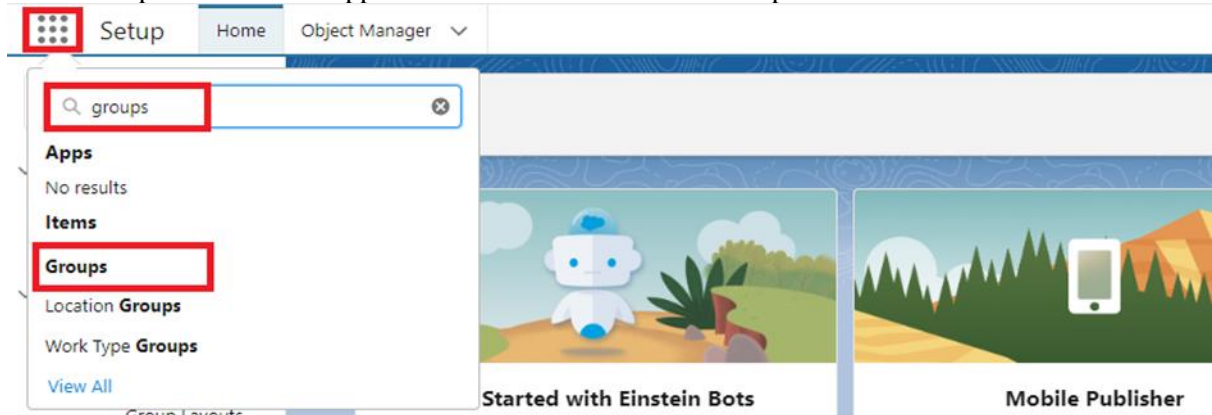
## 12.Chatter Group

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

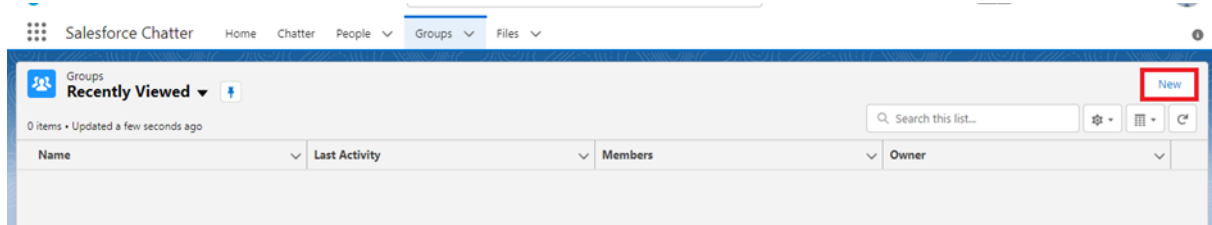
### Creating a chatter group for your organization.

To Create a chatter group:

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



3. Click New.



4. Fill in the new group information with 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



Force Chatter Home Chatter

### 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

### New Group

Group Email

\*Owner  
Employee Project

Disable automatic archiving  
☐

\*Access Type  
Private

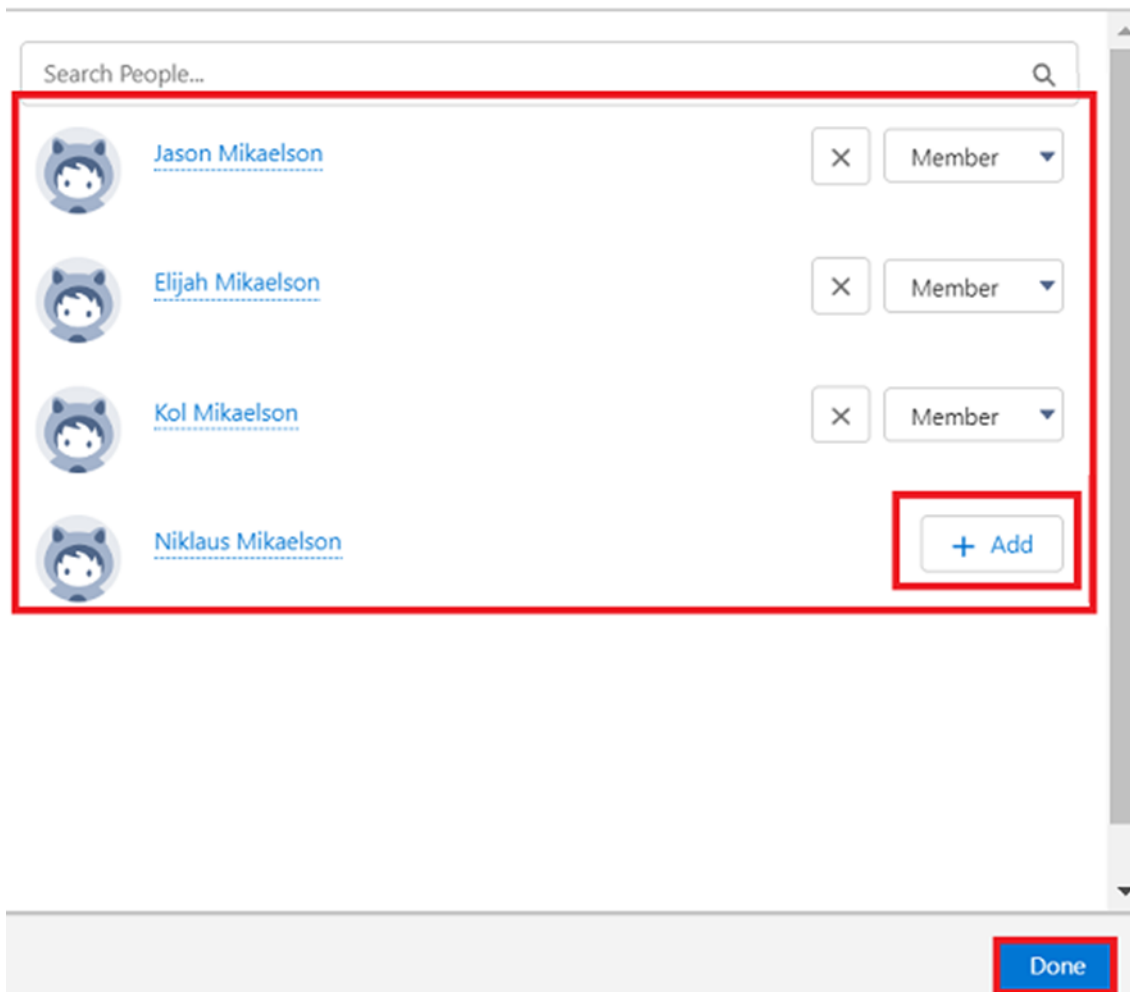
Allow customers  
☒

Broadcast Only  
☐

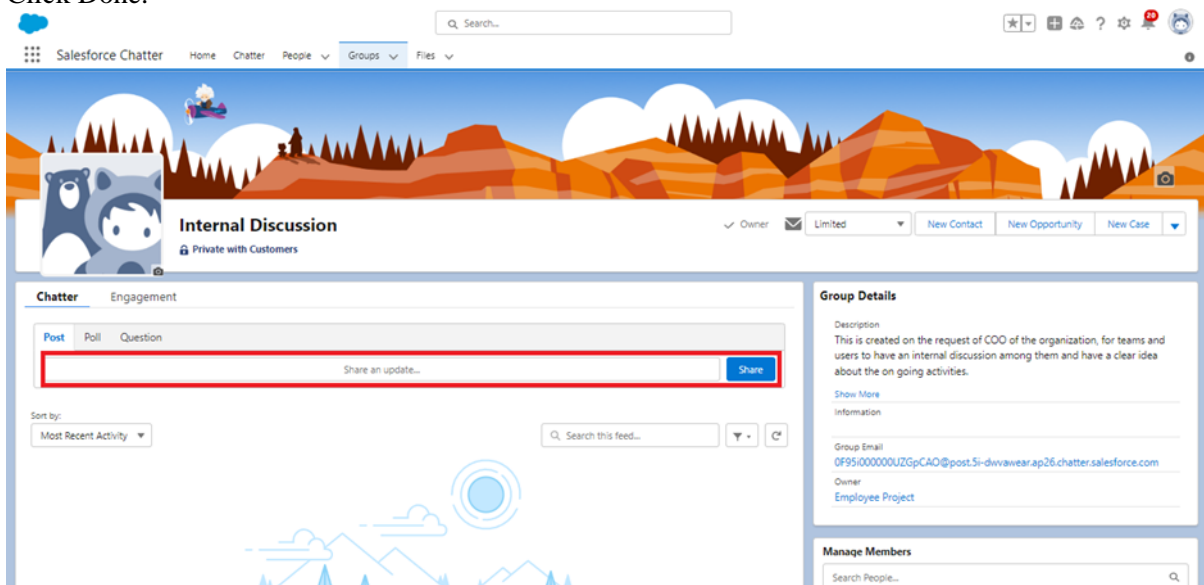
Cancel Save & Next

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

## Manage Members



7. Click Done.



8. This is how your group interface looks like.

9. Where it says Share an update, post this message to the group: Welcome to the Internal Discussion Group, here you can post anything which is related to ongoing projects.

10. Click Share.

Note: You can like or comment on this post.

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

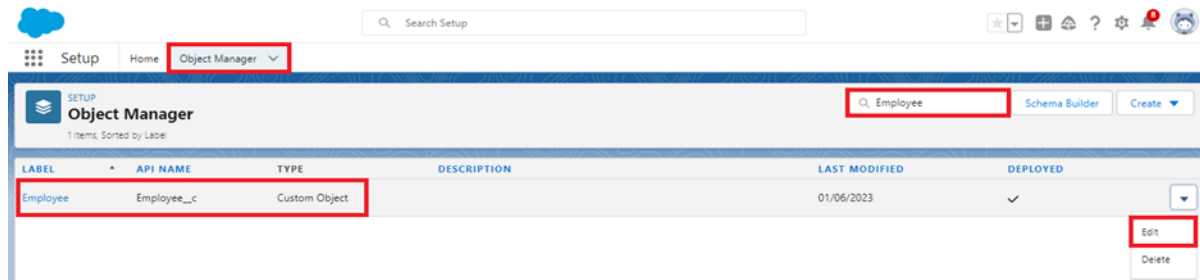
## 13. Record Types

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

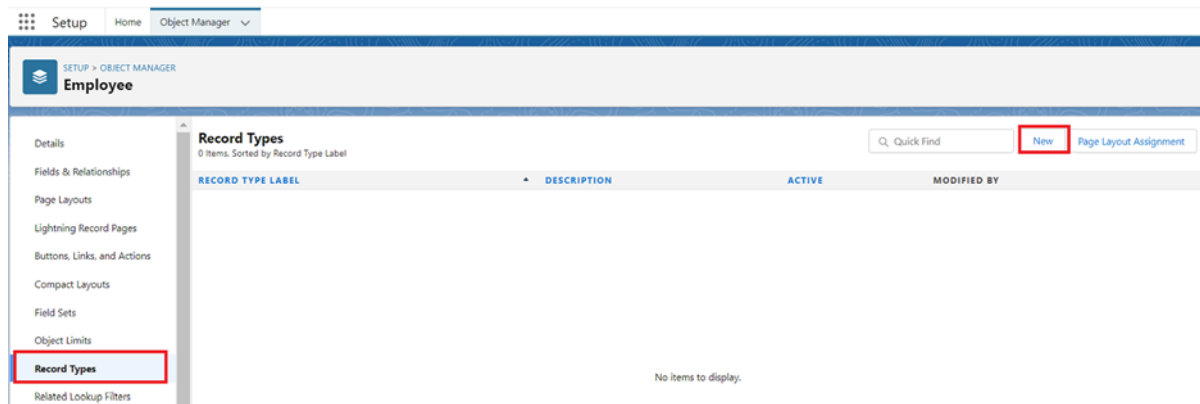
### Creating On Site Employee Record Type

To create a Record Type:

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



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 of 2

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

Record Type

Existing Record Type: --Master--

Record Type Label: On Site Employee

Record Type Name: On\_Site\_Employee

Description:

Active: ☒

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

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

4. Uncheck for "Make Available".

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

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

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

7. click Save.

## Creating "Remote Employee" Record Type

Create another Record Type with name “Remote Employee” as above.

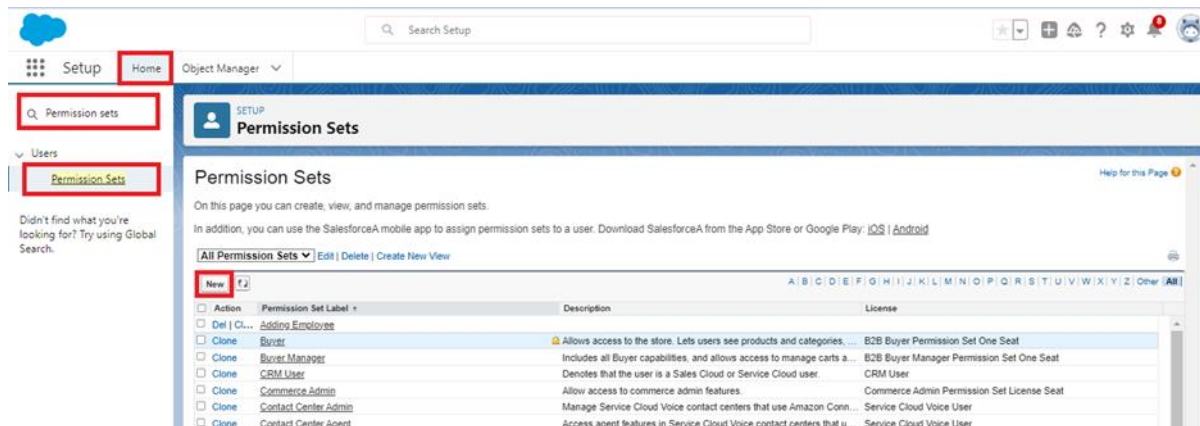
## 14.Permission sets

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

### Creating a permission set

To Create a Permission Set:

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



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

The screenshot shows the 'Create' form for a new Permission Set. The form is titled 'Enter permission set information'. It has fields for 'Label', 'API Name', and 'Description'. The 'Label' field contains 'Per to Emp' and the 'API Name' field contains 'Per\_to\_Emp'. Both fields are highlighted with a red box. There is a 'Save' button and a 'Cancel' button at the top right of the form.

Permission Set  
Create

Enter permission set information

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**

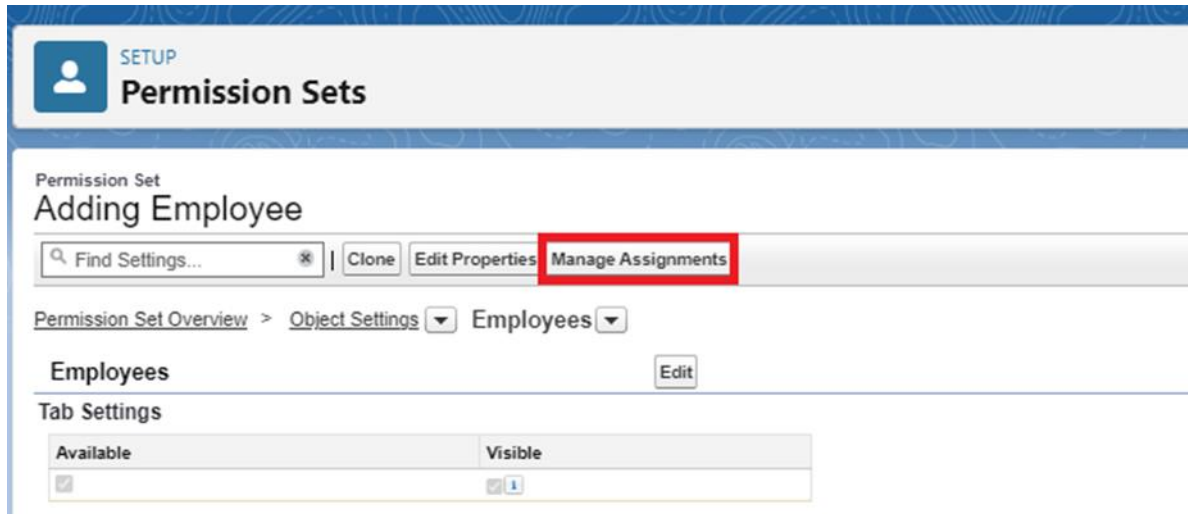
Record Types	Assigned Record Types
On Site Employee	<input checked="" type="checkbox"/>
Remote Employee	<input type="checkbox"/>

**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.

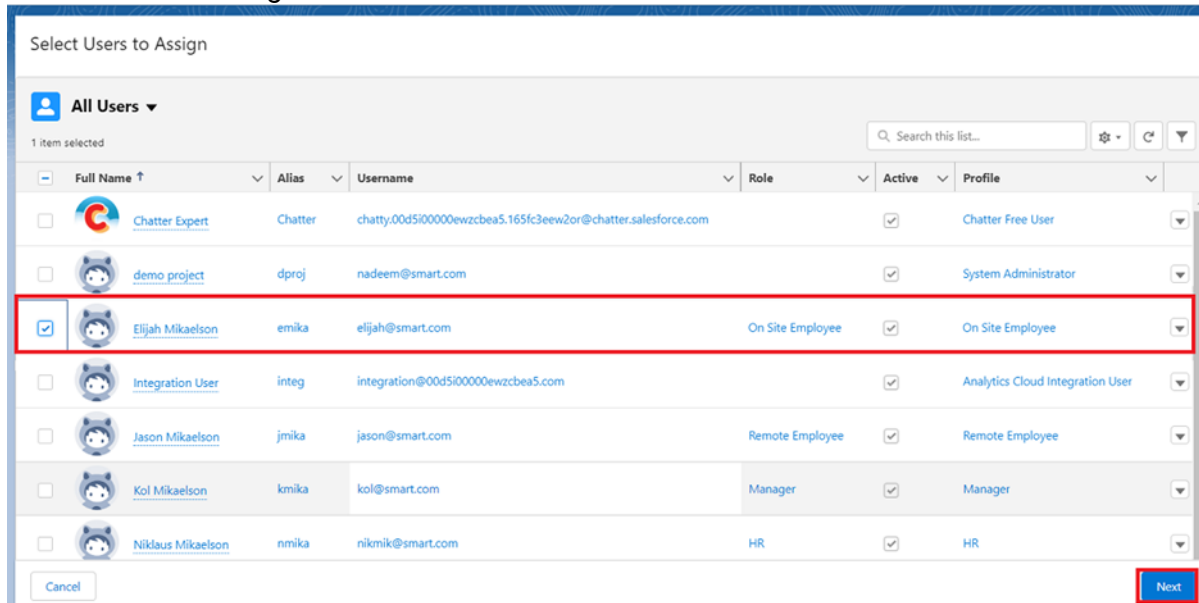
6. After saving the permission click on the Manage assignment



7. Now click on the Manage Assignment.



8. Click on Add Assignment.



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

10. Click on Assign

11. Click on Done.



# 15.Reports

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

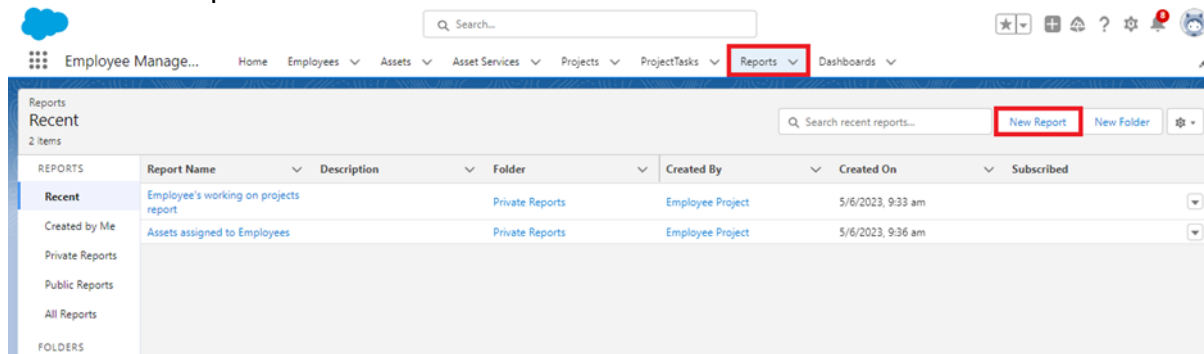
Types of Reports in Salesforce

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

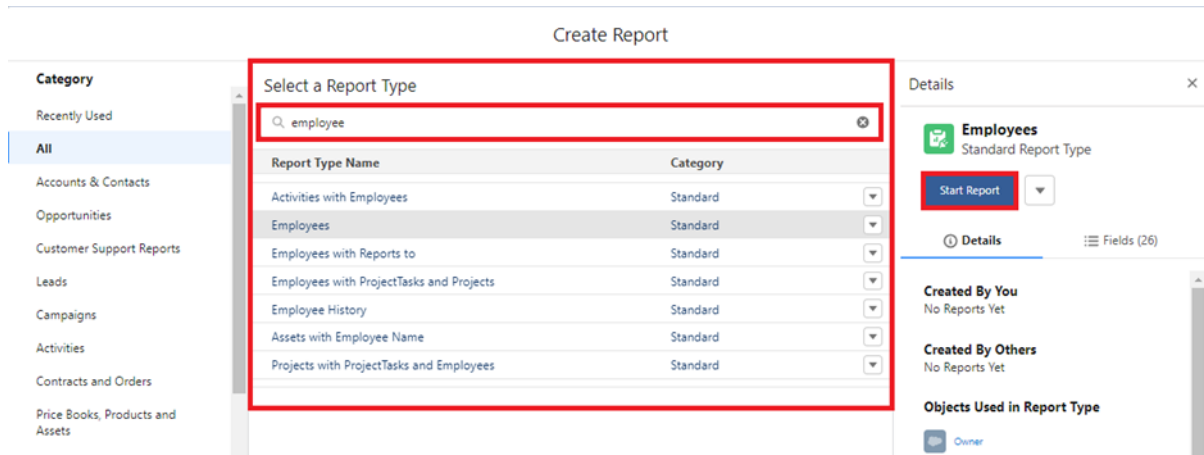
## Create Report

To Create a Report:

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



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



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

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	Employee	a025-000004176	-	-	-	-	<a href="https://linkedin.in">http://https://linkedin.in</a>
2	Emp for Junction test	a025-000004176	-	8:00 am	5:30 pm	-	<a href="https://linkedin.in">https://linkedin.in</a>

Update Preview Automatically

Save & Run Save Close Run

Outline Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

Employee: Employee Name

Employee ID

Reports to

Login Time

Logout Time

Mode of Work

LinkedIn Profile

5. Save or run it.

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

### Create 2 more Report

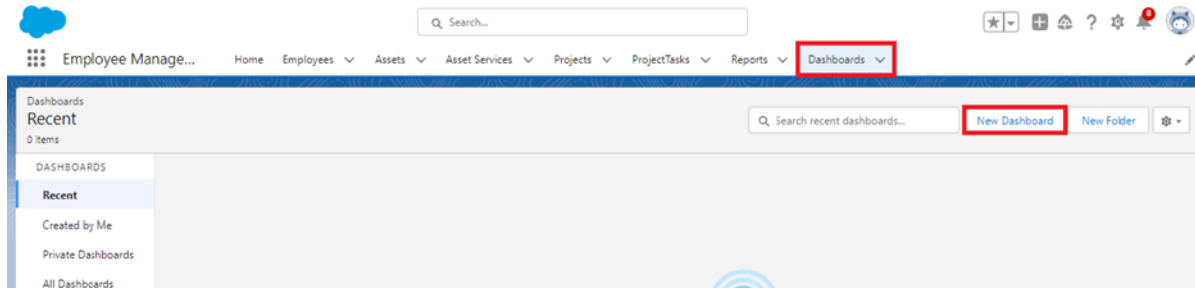
1. Create a report with report type: "Employees with ProjectTasks and Projects".
2. Create a report with report type: "Employees with Assets".

## 16.Dashboards

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

To Create a Dashboard

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



2. Give a Name and click on Create.

### New Dashboard

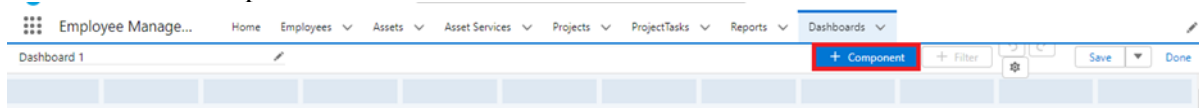
**\*Name**

**Description**

**Folder**

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...

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

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

**Create another Dashboard as above.**