



# S.K.P ENGINEERING COLLEGE

Approved by AICTE & Affiliated to Anna University

NH 66, Somasipadi Post, Chinnakangiyar, Tiruvannamalai,

Tamil Nadu-606611

## DEPARTMENT OF COMPUTER SCIENCE AND ENGINEERING

BACHELOR OF ENGINEERING 2024-2025

FIFTH SEMESTER

### **PROJECT TITLE: TRIP ADVISOR E-MANAGEMENT**

**Project Created by:** Nithish. R, Nithish Kumar. R, Praburam. S, Pradeesh. K

**Project Reviewed by:** Mr.Nasrudeen sha (AP/CSE)

**College Code:** 5122

**Team ID :**



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## DEPARTMENT OF COMPUTER SCIENCE AND ENGINEERING

Certified that this is a bonafide record of work done by,

Name : Nithish. R, Nithish Kumar. R, Praburam. S, Pradeesh. K

University Reg No :

Year / Semester : 3 / 5

Branch : CSE

Year : 2024-2025

**Staff-in-Charge**

**Head of the Department**

Submitted for the \_\_\_\_\_

Practical Examination held on\_\_\_\_\_

**Internal Examiner**

**External Examiner**

# WORKFORCE ADMINISTRATION SOLUTION

## (Dev)

### 1. PROJECT VIEW:

This project is focused on creating a comprehensive Workforce Administration Solution, designed to address challenges in managing employee records, schedules, and administrative workflows. The goal is to leverage Salesforce's capabilities to streamline administrative tasks, improve operational efficiency, and enhance employee experiences. By integrating advanced automation and reporting features, this solution supports the long-term goals of workforce management systems, ensuring scalability and accuracy.

### 2. OBJECTIVES:

#### Business Goals:

- Automate workforce administrative processes to reduce manual effort.
- Enable data-driven decision-making through real-time analytics.
- Improve employee engagement with self-service tools.

#### Specific Outcomes:

- Develop a unified platform for managing employee data, including profiles, schedules, and attendance.
- Automate critical HR workflows such as leave approvals and performance evaluations.
- Generate dynamic reports and dashboards to aid in decision-making for workforce planning.
- Enable seamless integration with payroll, compliance, and attendance systems to ensure operational harmony.

### 3. SALESFORCE KEY FEATURES AND CONCEPTS

#### UTILIZED:

- **Salesforce Service Cloud:** Enables efficient case management for handling employee queries and grievances.
- **Custom Objects and Fields:** Tracks specific workforce details, including job roles, departmental affiliations, and work histories.
- **Automation Tools:** Includes Process Builder, Flow, and Apex Triggers for streamlined workflow execution.
- **Reports and Dashboards:** Provides detailed views of workforce KPIs such as attendance, productivity, and schedule adherence.
- **Lightning Web Components (LWC):** Enhances user interaction with visually appealing and functional interfaces tailored to HR use cases.

### 4. DETAILED STEPS TO SOLUTION DESIGN:

#### Data Models:

- Create custom objects for Employee Records, Work Shifts, and Attendance Logs.
- Define relationships between employee data and department hierarchies, ensuring consistent data structure.
- Custom fields to track metrics like employee leave balances, overtime hours, and project assignments.

## User Interface Design:

## Business Logic:

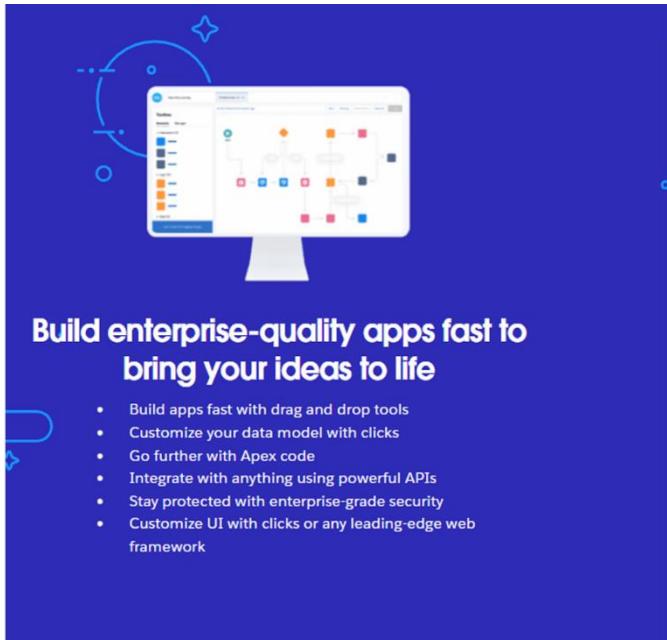
- Automate routine processes such as leave requests, manager approvals, and onboarding tasks using Apex Triggers and Flow.
- Implement validation rules to enforce data accuracy, ensuring clean and reliable records.
- Notifications and reminders configured for critical deadlines like appraisal submissions or compliance checks.

## 4.1 CREATE AND ACTIVATE SALESFORCE ACCOUNT:

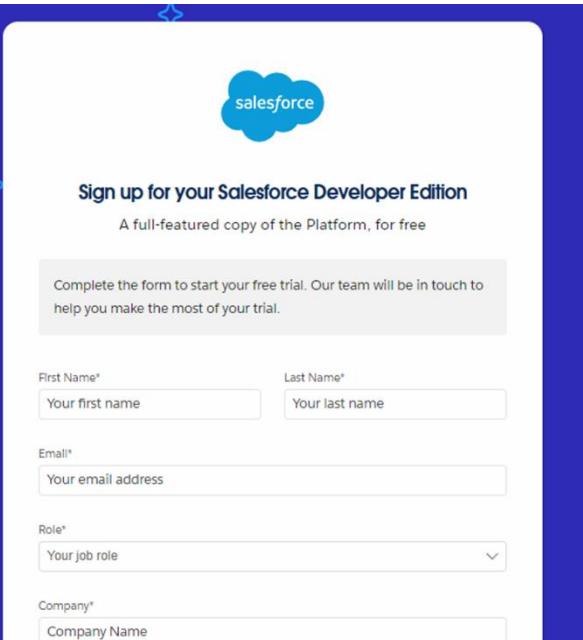
### 4.1.1 Creating developer account:

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  
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.



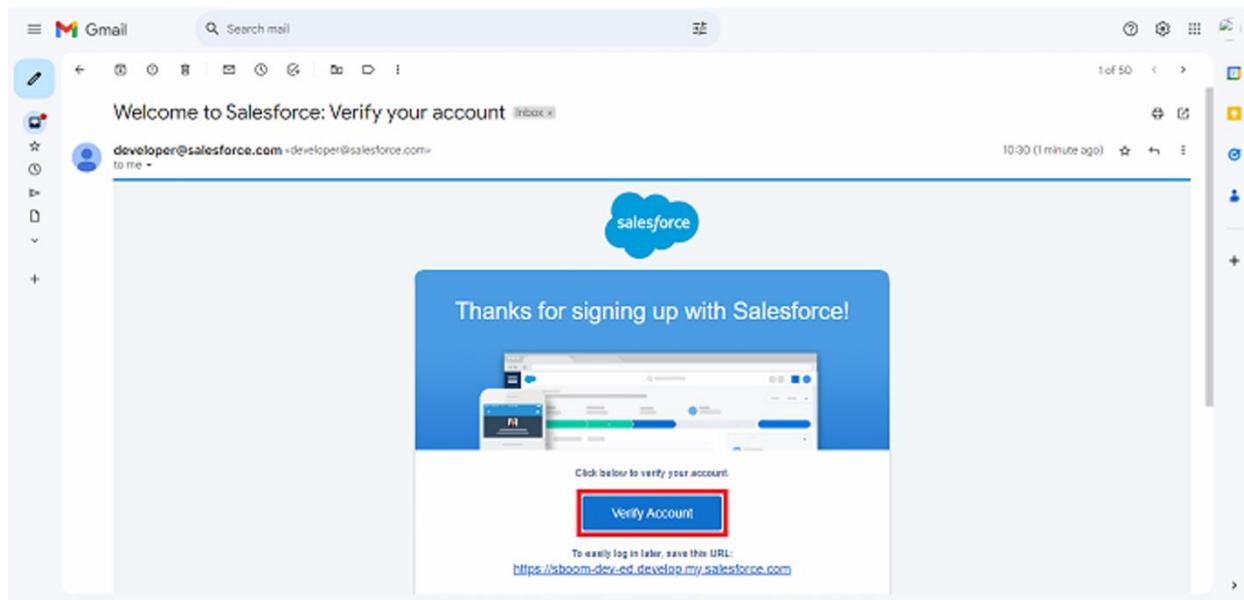
The screenshot shows a dark blue landing page for Smart Internz. On the left, there's a large white computer monitor icon displaying a complex network diagram with various nodes and connections. To the right of the monitor, the text reads: "Build enterprise-quality apps fast to bring your ideas to life". Below this, a bulleted list of features includes: 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, and Customize UI with clicks or any leading-edge web framework.



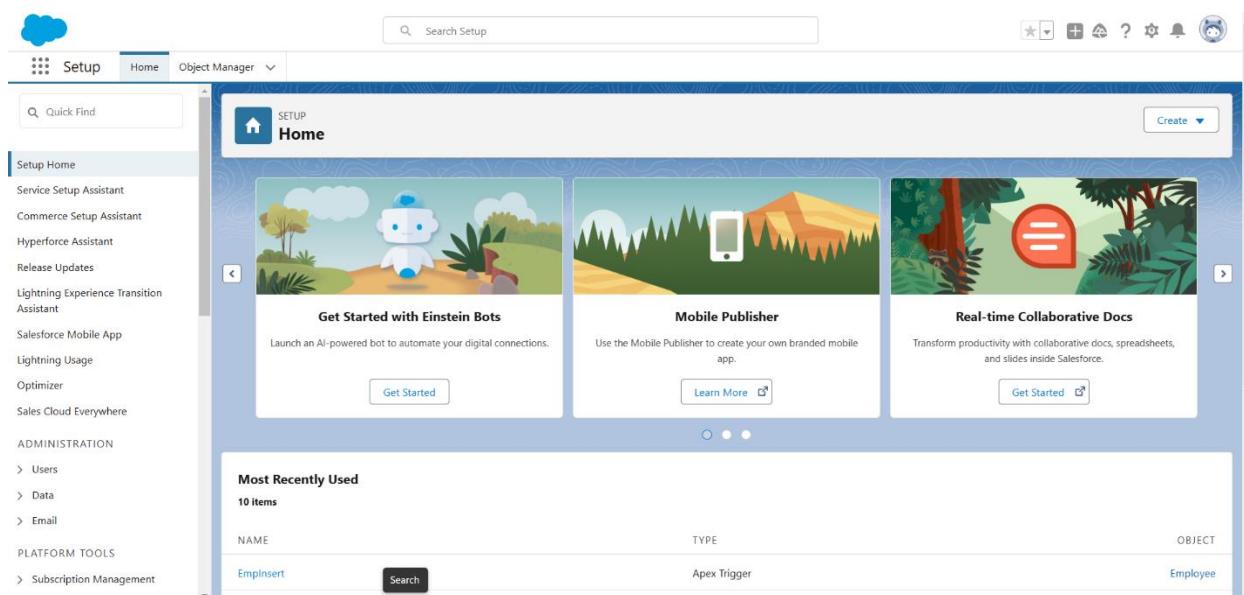
The screenshot shows a sign-up form for the Salesforce Developer Edition. At the top, it says "Sign up for your Salesforce Developer Edition" and "A full-featured copy of the Platform, for free". Below this is a descriptive text: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form itself has four fields: "First Name\*" with input placeholder "Your first name", "Last Name\*" with input placeholder "Your last name", "Email\*" with input placeholder "Your email address", and "Role\*" with a dropdown menu showing "Your job role". At the bottom, there's a field "Company\*" with input placeholder "Company Name".

#### 4.1.2 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.
4. when you will redirect to your salesforce setup page.



## 4.2 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:**

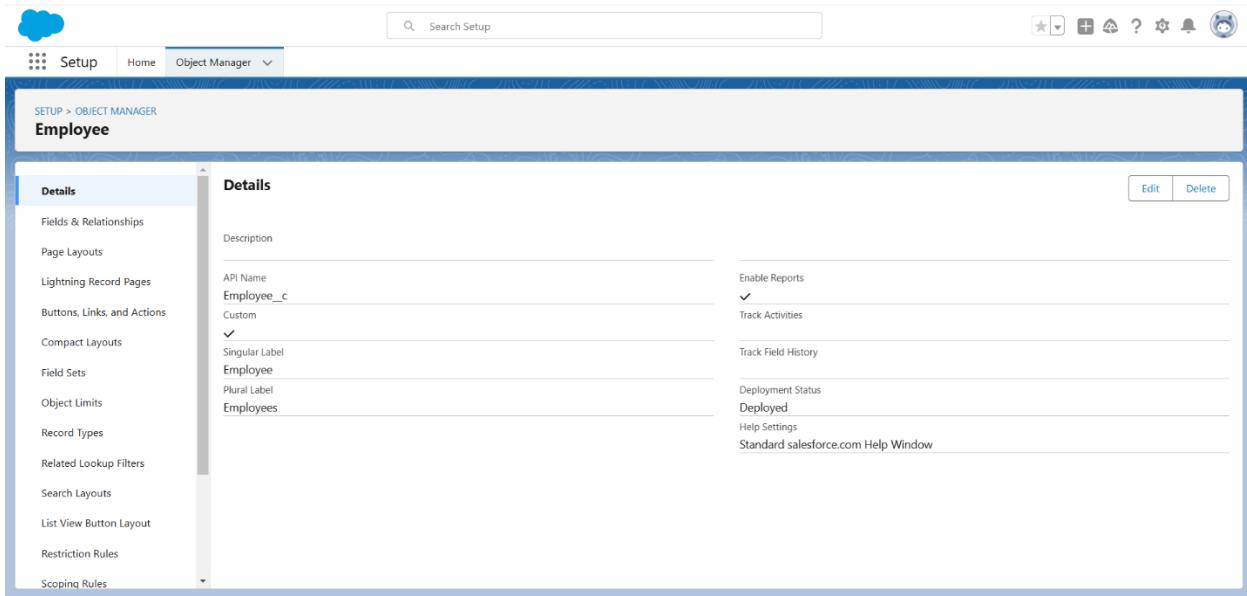
**1. Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

**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.

### 4.2.1 Creating a custom object Employee:

To create a custom object, follow these steps:

1. From setup click on Object manager.
2. Click create, select custom object.
3. Fill in the label as " Employee ".
4. Fill in the plural label as " Employees ".
5. Record name: "Employee ID".
6. Select the data type as "Auto Number".
7. Under Display format enter EMS-{0000}.
8. Enter starting Number as 1.
9. Click on Allow reports,
10. Allow search --> Save.



The screenshot shows the Salesforce Setup interface with the following details:

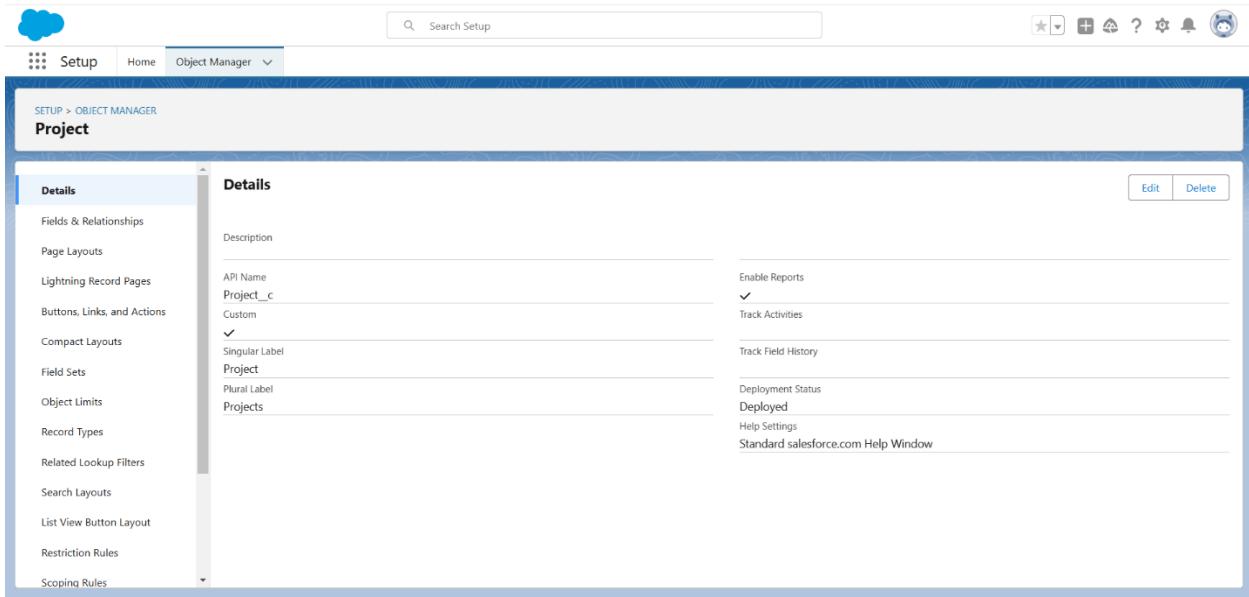
- Setup** tab is active.
- Object Manager** is selected under the **Object Manager** dropdown.
- Employee** object is selected.
- Details** tab is selected.
- Description**: None
- API Name**: Employee\_\_c
- Custom**: ✓
- Singular Label**: Employee
- Plural Label**: Employees
- Enable Reports**: ✓
- Track Activities**: None
- Track Field History**: None
- Deployment Status**: Deployed
- Help Settings**: Standard salesforce.com Help Window

11. Leave everything else as is, and click Save.

#### 4.2.2 Creating a custom object Project:

To create a custom object, follow these steps:

1. From setup click on Object manager.
2. Click create, select custom object.
3. Fill in the label as " Project ".
4. Fill in the plural label as " Projects ".
5. Record name: "Project ID".
6. Select the data type as "Auto Number".
7. Under Display format enter Proj-{0000}.
8. Enter starting Number as 1.
9. Click on Allow reports,
10. Allow search --> Save.



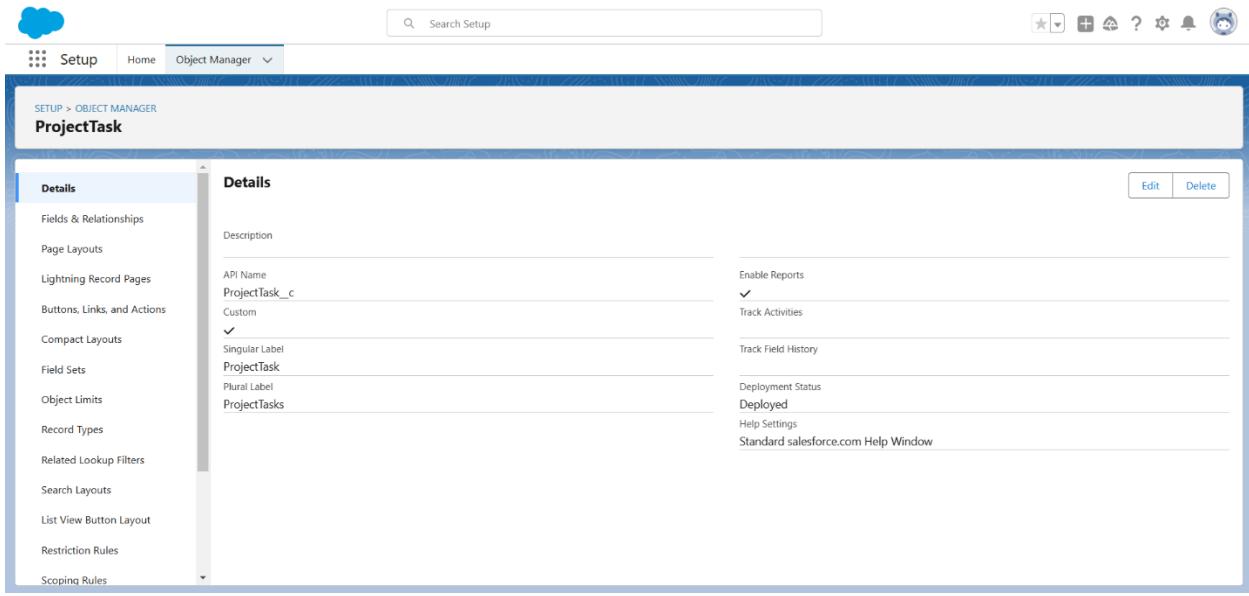
The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under 'SETUP > OBJECT MANAGER', the 'Project' object is selected. On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main area displays the 'Details' tab for the 'Project' object. It includes fields for Description, API Name (set to 'Project\_\_c'), Custom (selected), Singular Label (set to 'Project'), Plural Label (set to 'Projects'), and several checkboxes for Enable Reports (checked), Track Activities, Track Field History, Deployment Status (set to 'Deployed'), Help Settings, and Standard salesforce.com Help Window.

11. Leave everything else as is, and click Save.

#### 4.2.3 Creating a custom object Project Task:

To create a custom object, follow these steps:

1. From setup click on Object manager.
2. Click create, select custom object.
3. Fill in the label as " Project Task ".
4. Fill in the plural label as " Project Tasks ".
5. Record name: "Project Task Name".
6. Select the data type as "Text".
7. Click on Allow reports,
8. Allow search --> Save.
9. Leave everything else as is, and click Save.



The screenshot shows the Salesforce Object Manager interface for the 'ProjectTask' object. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main 'Details' tab is selected, showing the following fields:

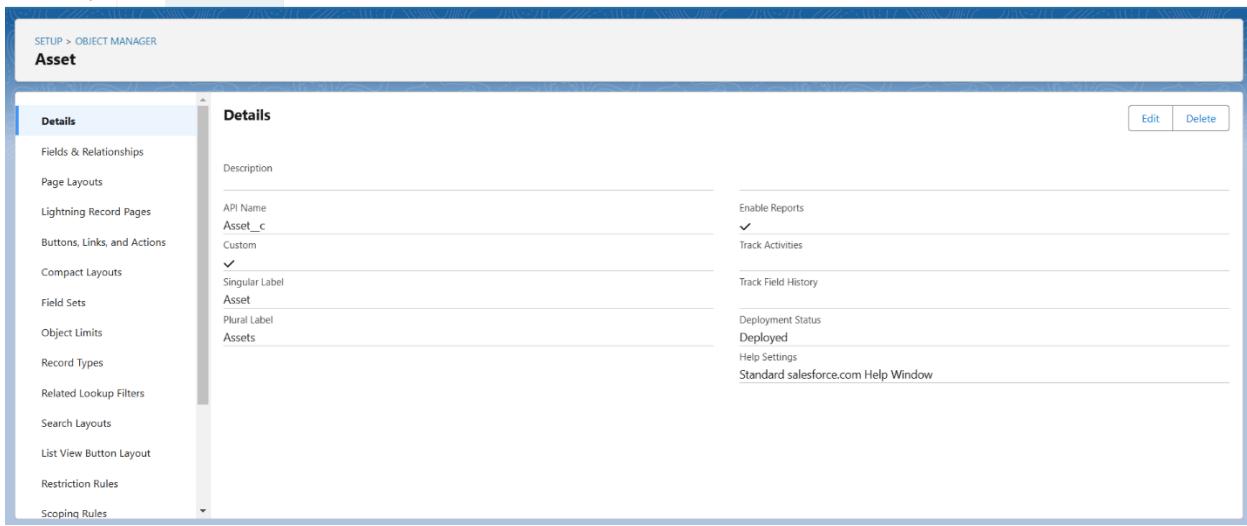
Field	Value
Description	
API Name	ProjectTask_c
Custom	✓
Singular Label	ProjectTask
Plural Label	ProjectTasks
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the top right of the main area are 'Edit' and 'Delete' buttons.

#### 4.2.4 Creating a custom object Asset:

To create a custom object, follow these steps:

1. From setup click on Object manager.
2. Click create, select custom object.
3. Fill in the label as " Asset ".
4. Fill in the plural label as " Assets ".
5. Record name: "Asset Name".
6. Select the data type as "Text".
7. Click on Allow reports,
8. Allow search --> Save.
9. Leave everything else as is, and click Save.

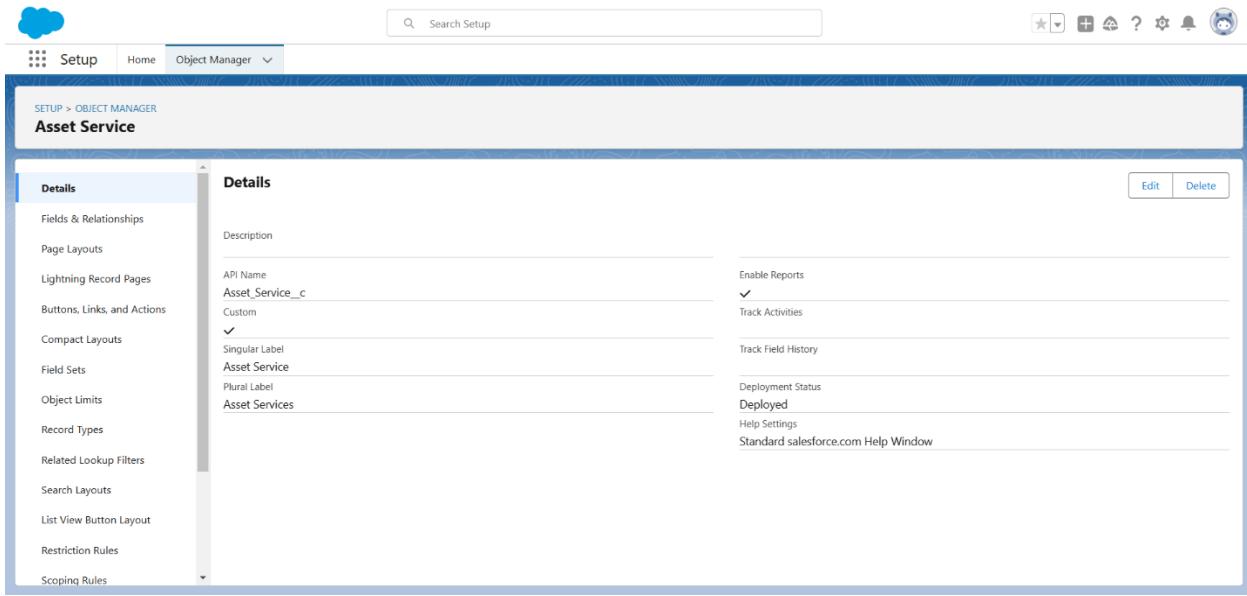


The screenshot shows the Salesforce Setup interface with the Object Manager selected. Under the Asset object, the Details tab is active. The API Name is set to Asset\_\_c. The Singular Label is Asset and the Plural Label is Assets. Several checkboxes are checked: Enable Reports, Track Activities, and Track Field History. Deployment Status is set to Deployed. Help Settings point to Standard salesforce.com Help Window.

#### 4.2.5 Creating a custom object Asset Service:

To create a custom object, follow these steps:

1. From setup click on Object manager.
2. Click create, select custom object.
3. Fill in the label as " Asset Service ".
4. Fill in the plural label as "Asset Services ".
5. Record name: "Asset Service Name".
6. Select the data type as "Text".
7. Click on Allow reports,
8. Allow search --> Save.
9. Leave everything else as is, and click Save.



## 4.3 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.

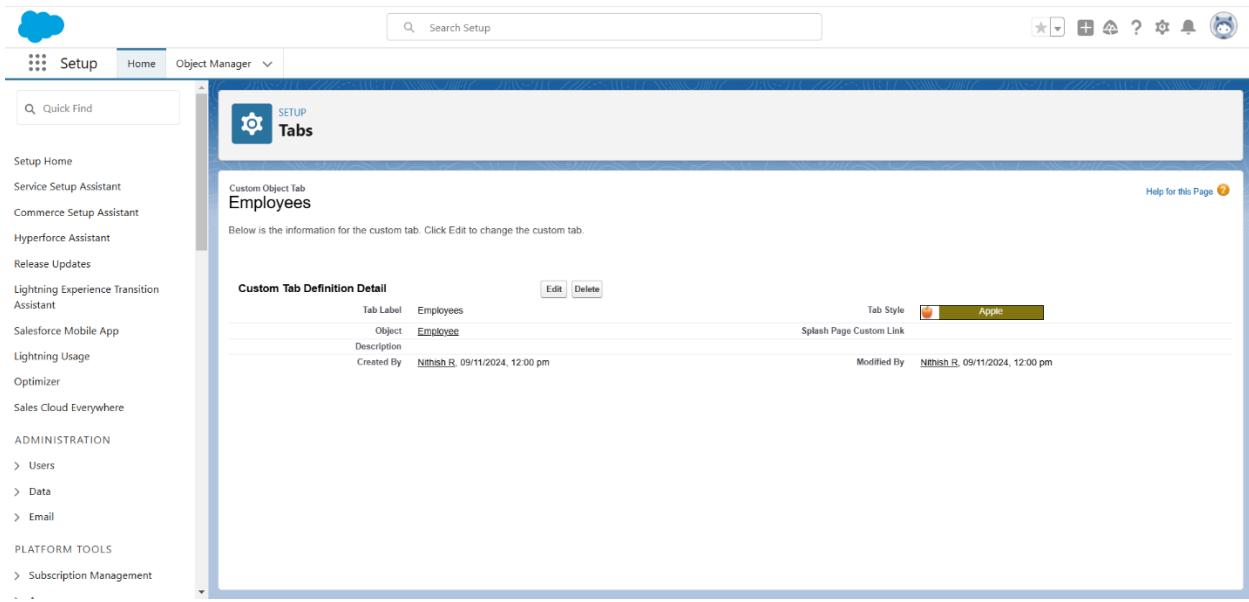
**4. Lightning Component Tabs:** Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

**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.

#### **4.3.1 Creating a 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)
2. Select Object (Employee) > Select the tab style > Next (Add to profiles page) keep it as default > Next (Add to Custom App) keep it as default > Save.



The screenshot shows the Salesforce Setup interface. In the top navigation bar, the 'Setup' button is selected. The main content area is titled 'SETUP Tabs' and displays information for a 'Custom Object Tab Employees'. The tab definition details are as follows:

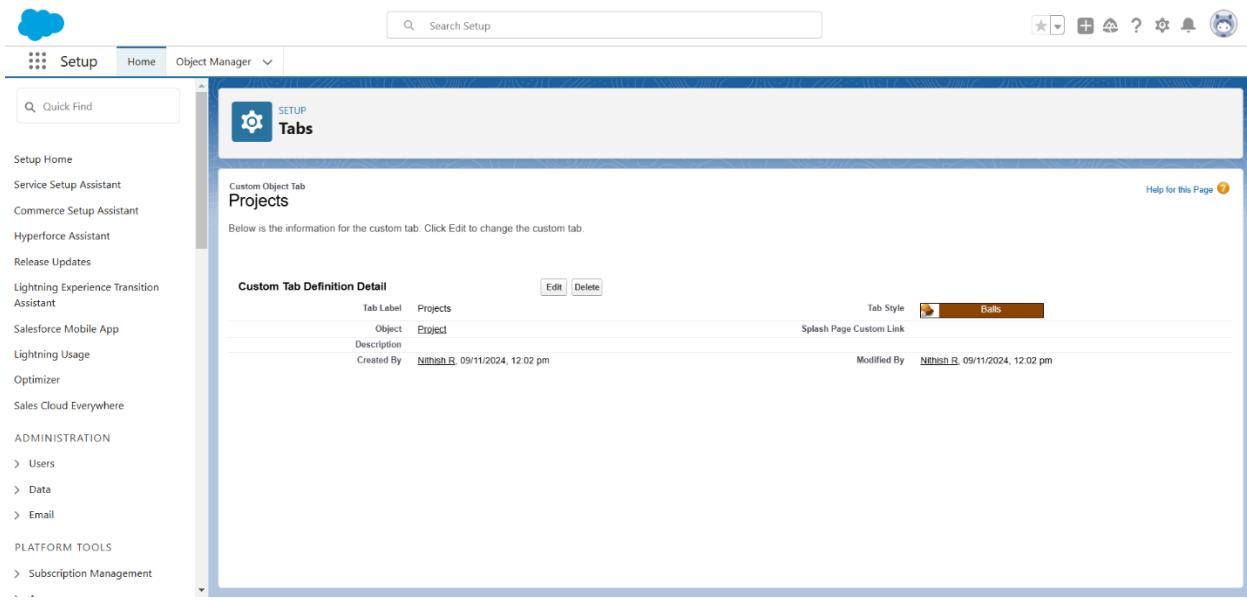
Tab Label	Employees	Tab Style	Apple
Object	Employee	Splash Page	Custom Link
Description		Created By	Nithish R. 09/11/2024, 12:00 pm
		Modified By	Nithish R. 09/11/2024, 12:00 pm

The left sidebar contains a navigation tree with categories like Setup Home, Service Setup Assistant, Commerce Setup Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, Administration (with sub-options for Users, Data, Email), and Platform Tools.

### 4.3.2 Creating a tab Project:

To create a 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.

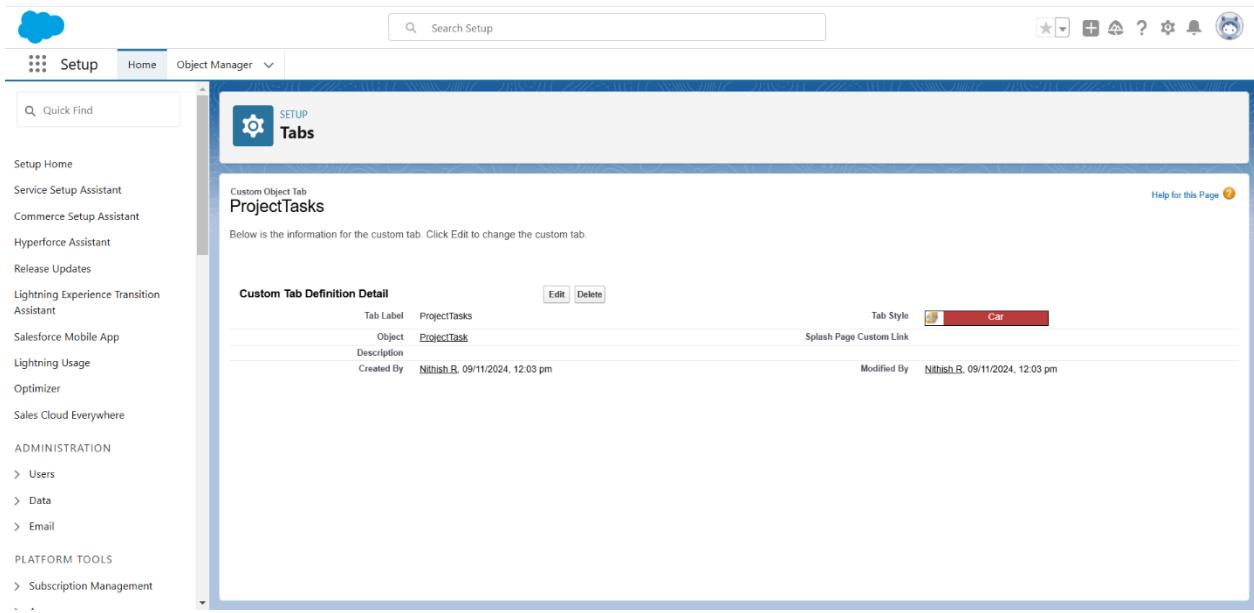


The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. The main content area is titled 'SETUP Tabs'. It displays a 'Custom Object Tab' for 'Projects'. The 'Tab Label' is set to 'Projects', 'Object' to 'Project', and 'Tab Style' is selected as 'Balls'. The 'Created By' field shows 'Nitish\_R\_ 09/11/2024, 12:02 pm' and the 'Modified By' field shows 'Nitish\_R\_ 09/11/2024, 12:02 pm'. A 'Custom Tab Definition Detail' table is shown with columns for Tab Label, Object, Description, Created By, and Modified By.

### 4.3.3 Creating a tab Project Task:

To create a Tab:(Project Task)

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



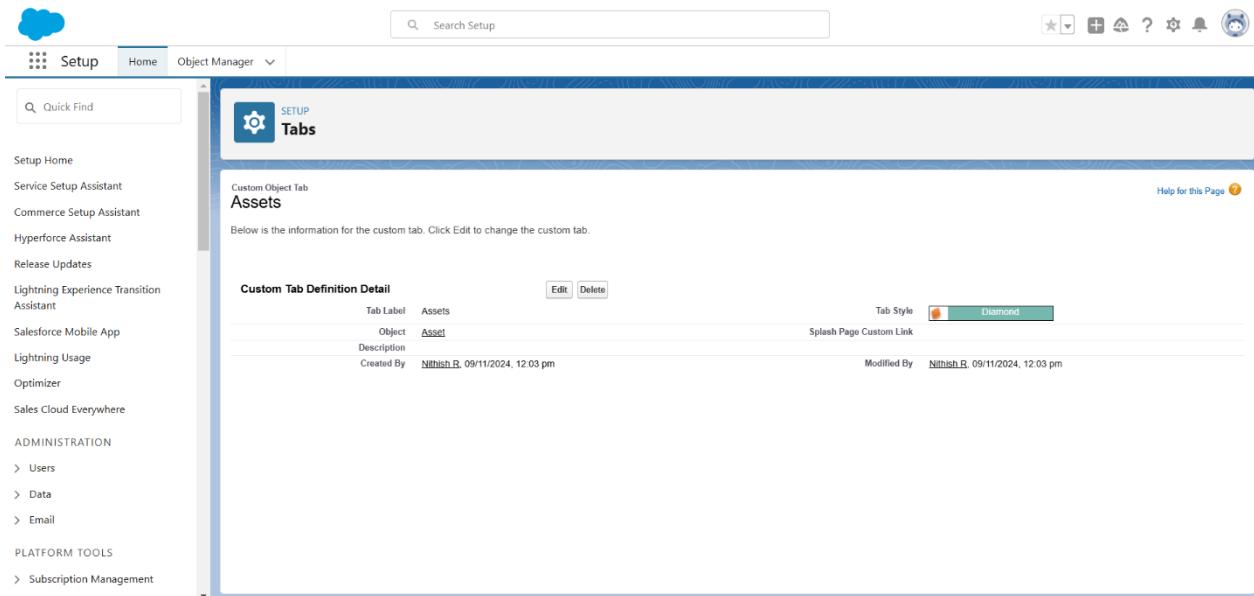
The screenshot shows the Salesforce Setup interface under the 'Tabs' section. A custom object tab named 'ProjectTasks' has been created. The tab detail page displays the following information:

Custom Tab Definition Detail	Tab Label	Object	Description	Created By	Modified By	Tab Style	Splash Page Custom Link
	ProjectTasks	ProjectTask		Nithish.R. 09/11/2024, 12:03 pm	Nithish.R. 09/11/2024, 12:03 pm	Car	

The left sidebar lists various setup categories like Setup Home, Service Setup Assistant, and Administration.

#### 4.3.4 Creating a tab for remaining objects:

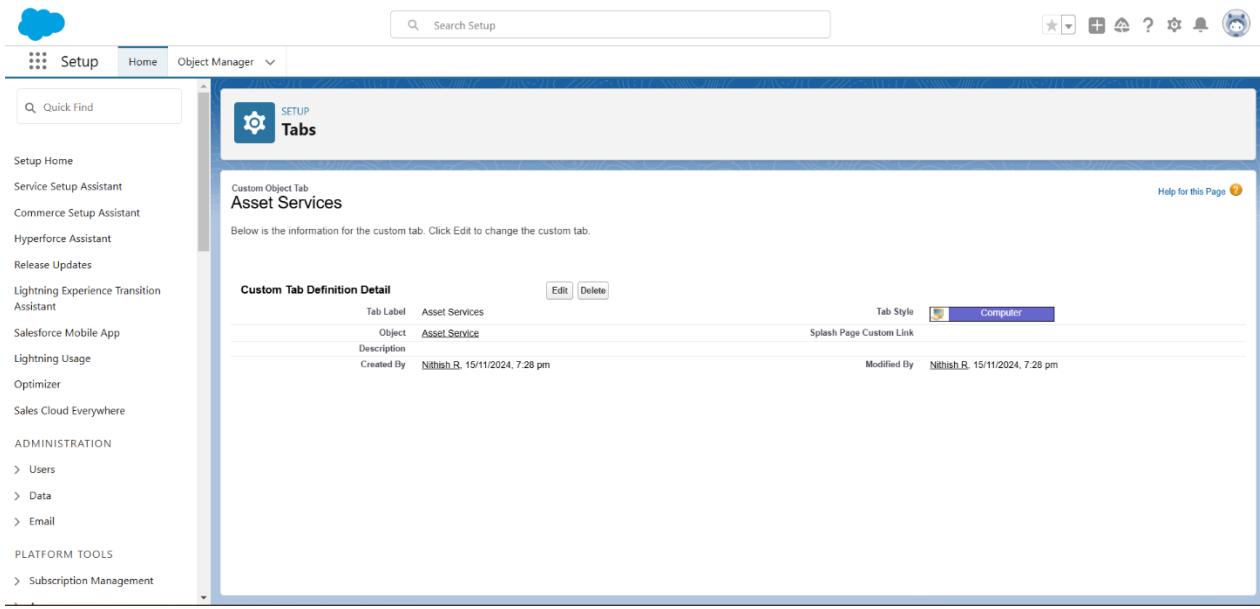
Now create the tabs for Assets, Asset Services.



The screenshot shows the Salesforce Setup interface under the 'Tabs' section. A custom object tab named 'Assets' has been created. The tab detail page displays the following information:

Custom Tab Definition Detail	Tab Label	Object	Description	Created By	Modified By	Tab Style	Splash Page Custom Link
	Assets	Asset		Nithish.R. 09/11/2024, 12:03 pm	Nithish.R. 09/11/2024, 12:03 pm	Diamond	

The left sidebar lists various setup categories like Setup Home, Service Setup Assistant, and Administration.



The screenshot shows the Salesforce Setup interface under the 'Tabs' section. A custom tab for 'Asset Services' has been created. The tab details are as follows:

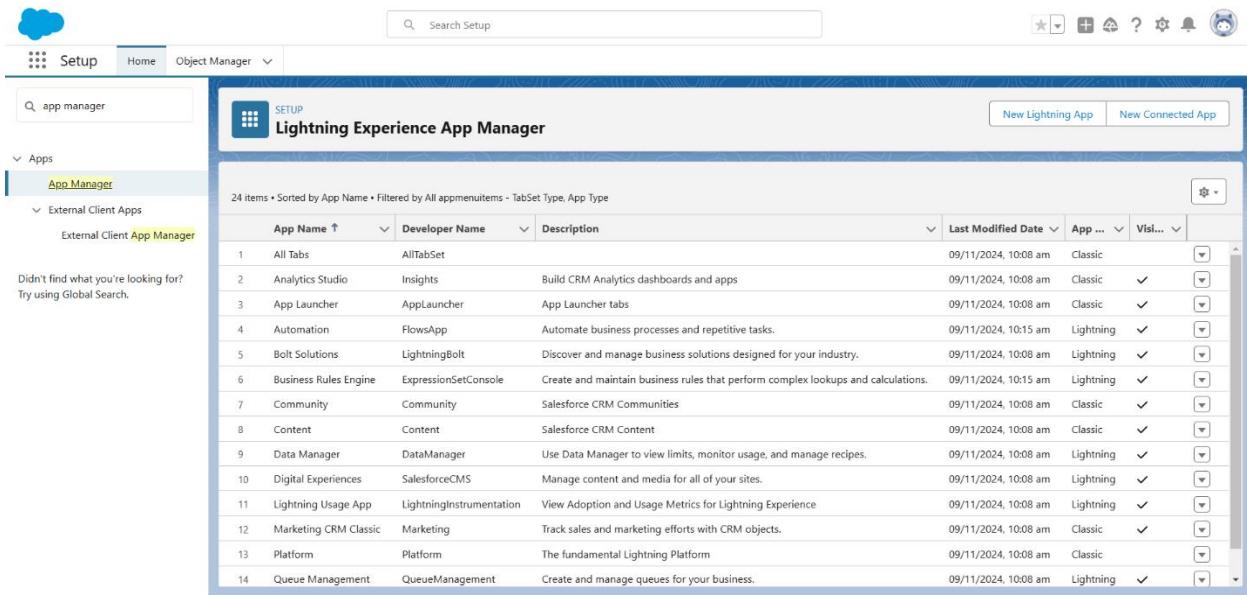
Custom Tab Definition Detail
Tab Label: Asset Services
Object: Asset Service
Description: (empty)
Created By: Nithish.R, 15/11/2024, 7:28 pm
Modified By: Nithish.R, 15/11/2024, 7:28 pm
Tab Style: Computer
Splash Page Custom Link: (empty)

## 4.4 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.

### 4.4.1 Creating a Lightning App:

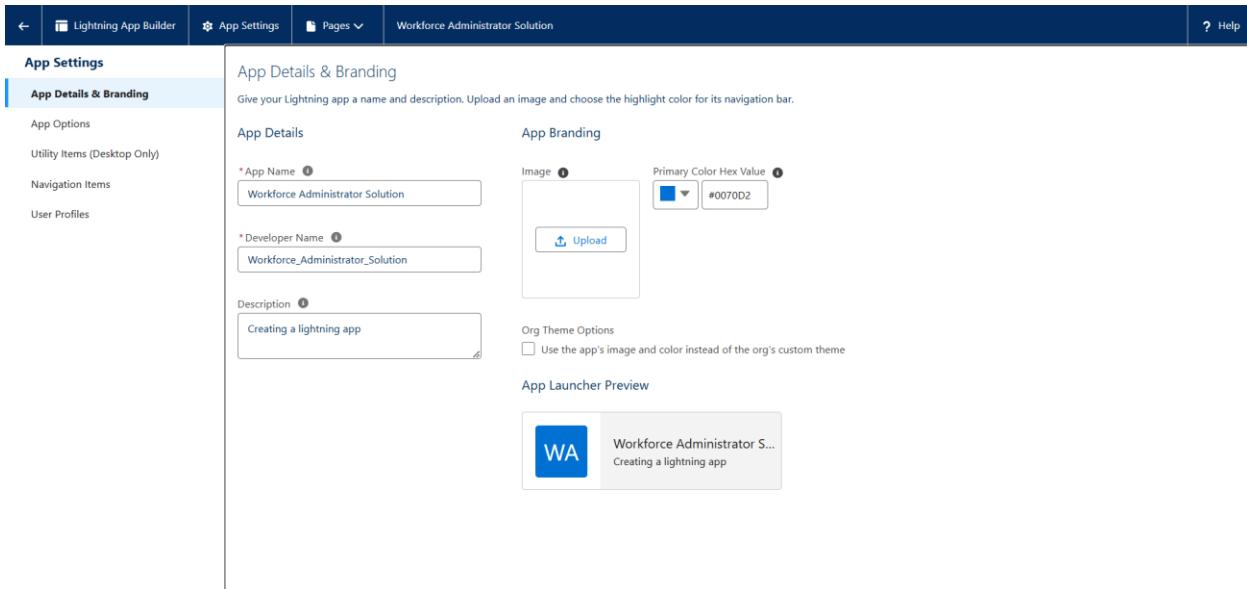
1. Go to setup page > search “app manager” in quick find > select “app manager” > click on new lightning App.



The screenshot shows the "Lightning Experience App Manager" page in the Salesforce Setup. The left sidebar has "App Manager" selected under "Apps". The main area displays a table of 24 installed apps, sorted by App Name. The columns include App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. Apps listed include All Tabs, Analytics Studio, App Launcher, Automation, Bolt Solutions, Business Rules Engine, Community, Content, Data Manager, Digital Experiences, Lightning Usage App, Marketing CRM Classic, Platform, and Queue Management.

2. Fill the app name in app details and branding > Next > (App option page)

keep it as default > Next > (Utility Items) keep it as default > Next.



The screenshot shows the "App Details & Branding" section of the Lightning App Builder. The left sidebar has "App Details & Branding" selected under "App Settings". The main form includes fields for "App Name" (Workforce Administrator Solution), "Developer Name" (Workforce\_Administrator\_Solution), "Image" (a placeholder box with an "Upload" button), "Primary Color Hex Value" (#0070D2), and "Description" (Creating a lightning app). There is also an "Org Theme Options" checkbox and an "App Launcher Preview" section showing a blue square with "WA" and the app details.

3. To Add Navigation Items: Ctrl and Select the items (Employees, Project, Project Tasks, Asset, Asset Services, Reports and Dashboards) from the search bar and move it using the arrow button > Next.

Lightning App Builder   App Settings   Pages   Workforce Administrator Solution   ? Help

**App Settings**

- App Details & Branding
- App Options
- Utility Items (Desktop Only)

**Navigation Items**

- User Profiles

**Navigation Items**

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

**Available Items**

 Accounts
 All Sites
 Alternative Payment Methods
 Analytics
 App Launcher
 Appointment Categories
 Appointment Invitations
 Approval Requests
 Asset Action Sources
 Asset Actions

**Selected Items**

 Employees
 Projects
 ProjectTasks
 Assets
 Asset State Periods
 Reports
 Dashboards

#### 4. To Add User Profiles.

Lightning App Builder   App Settings   Pages   Workforce Administrator Solution   ? Help

**App Settings**

- App Details & Branding
- App Options
- Utility Items (Desktop Only)

**Navigation Items**

- User Profiles

**User Profiles**

User Profiles

Choose the user profiles that can access this app.

**Available Profiles**

Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User

**Selected Profiles**

System Administrator
----------------------

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

## 4.5 FIELDS:

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,

- Created By
- Owner
- Last Modified
- 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.

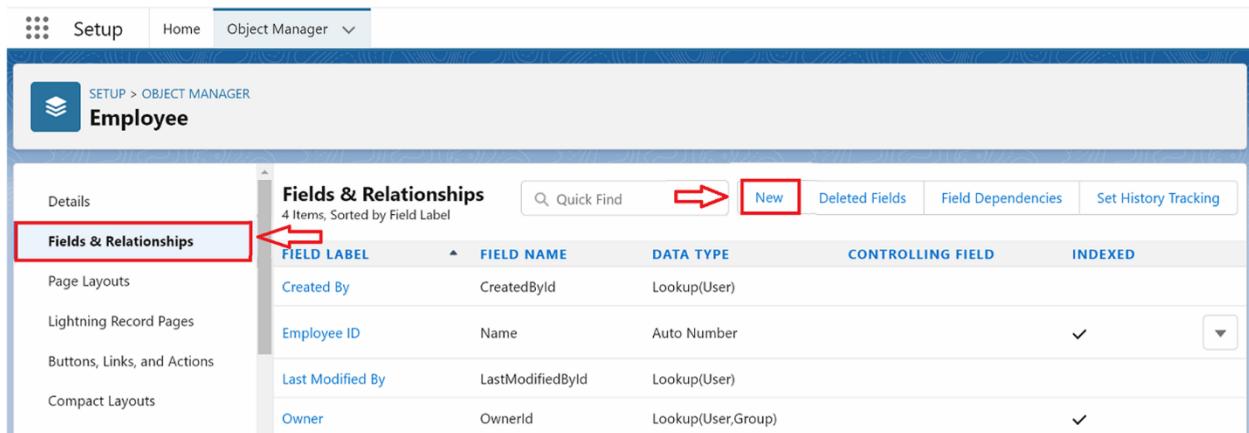
#### 4.5.1 Creating a text field in Employee object:

1. Goto setup → click on Object Manager → type object name (Employee) in quick find bar→ click on the object.



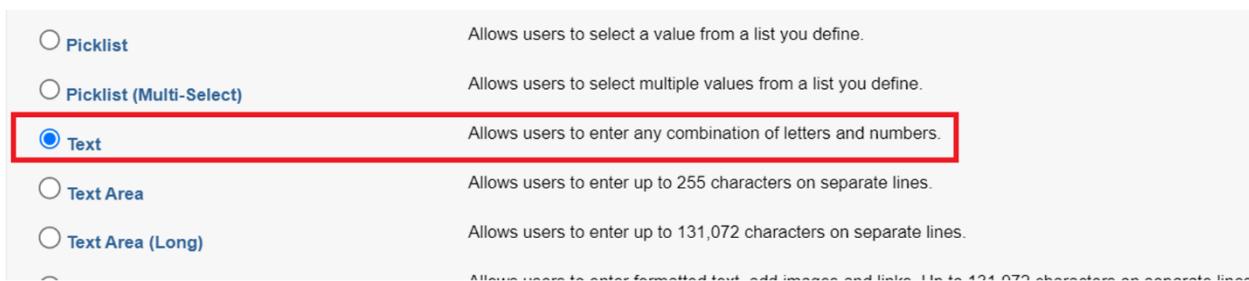
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Employee	Employee_c	Custom Object		20/06/2023	✓

2. Now Click on “Fields & Relationships” → New.



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Employee ID	Name	Auto Number		
Last Modified By	LastModifiedBy	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.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

4. Click on Next.

Employee  
New Custom Field[Help for this Page](#) 

Step 2. Enter the details Step 2 of 4

Previous  

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

5. Fill the above as following:

- Field Label: Employee Name.
- Length: 18.
- Field Name: gets auto generated.
- Click on Next →Next →Save and new.

#### 4.5.2 Creating Fields for Employee object:

Field Name	Data type
Date of Birth	Date
Age	Formula  Formula Return type: Number
Gender	Picklist: Values  Male Female
Reports to	Look up relationship with Employee object
Qualification	Text
Address	Text Area
Experience	Text Area
Phone no	Phone
Email	Email
Joining date	Date
Mode of Work	Picklist: Values  On Site Remote
Cab Allowances	Check box
Food Allowances	Check box
Wifi Allowances	Check box
Cab Allowance Amount	Currency
Food Allowance Amount	Currency
Wifi Allowance Amount	Currency

Login Time	Time
Logout Time	Time
LinkedIn Profile	url

#### 4.5.3 Creating Fields for Project object:

Field Name	Data type
Project Name	Text
Project Lead	Text
Start Date	Date
End Date	Date
Project Status	Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;">             Completed              On Going              Not Yet Started           </div>

#### 4.5.4 Creating Fields for Project Task object:

Field Name	Data type
Project Task	MDR with Project object
Employee Name	MDR with Employee object
Working Hours	Number
Finishes in	Formula: Project (Start Date – End Date) Formula Return type: Number

#### 4.5.5 Creating Fields for Asset object:

Field Name	Data type
Asset Type	Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;">             Laptop              Charger              Mouse              Monitor              CPU           </div>
Model Name	Text
Employee Name	Lookup relationship with Employee Object
Date of Issue	Formula: Employee (Joining date) Formula Return type: date

#### 4.5.6 Creating Fields for Asset Service object:

Field Name	Data type
Asset ID	Lookup relationship with Asset object
Type	Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;">             Technical Issue              Non Technical Issue           </div>
Technician	Text
Subject	Text Area
Description	Text Long

## 4.6 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-

- Public Read/Write/Transfer
- Public Read/Write
- Public Read/Only
- Private

### 4.6.1 Creating 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.

Setup    Home    Object Manager

sharing settings

Security

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

## Sharing Settings

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

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

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

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

Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset Service	Public Read/Write	Private	<input checked="" type="checkbox"/>
<b>Employee</b>	Private	Private	<input checked="" type="checkbox"/>
Project	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
<b>Other Settings</b>			
Standard Report Visibility <input checked="" type="checkbox"/> 		Manual User Record Sharing <input type="checkbox"/>  Manager Groups <input type="checkbox"/> 	
<b>Save</b> <b>Cancel</b>			

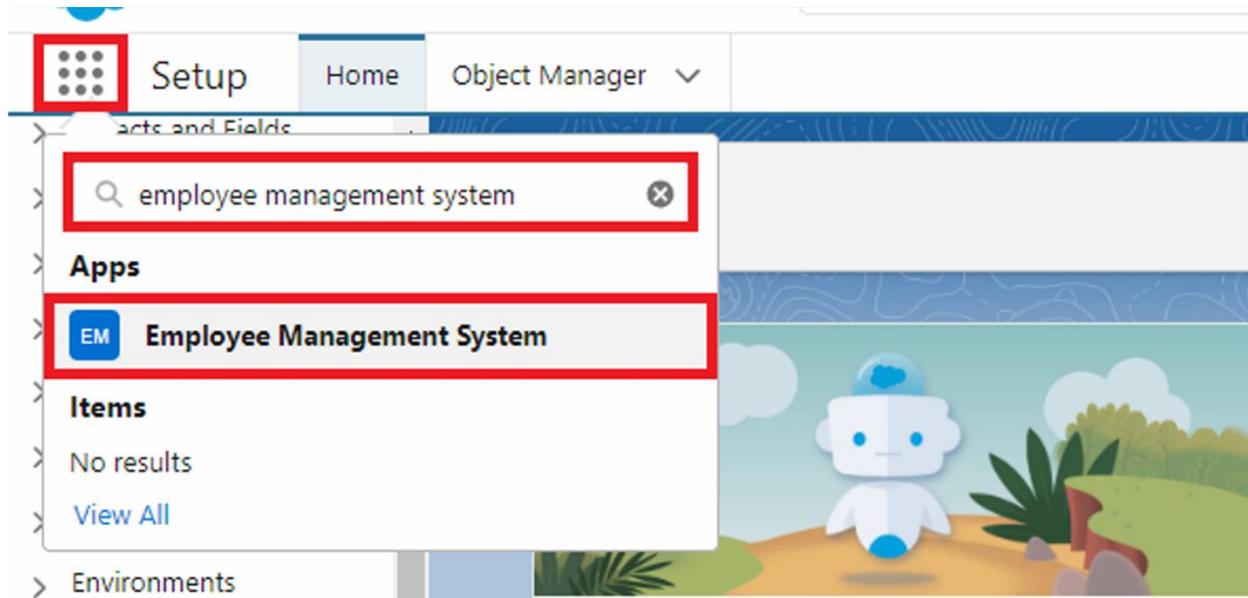
6. This setting is for all the Users which have been created.

## 4.7 USER ADOPTION:

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

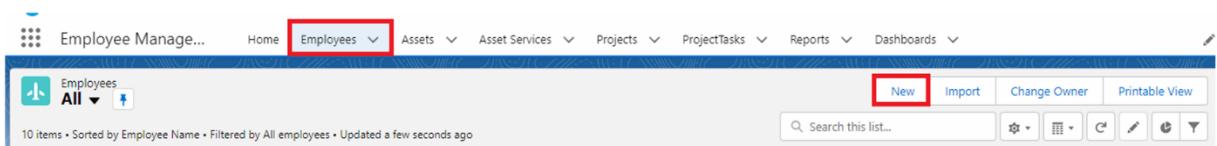
### 4.7.1 Create a Record:

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.

#### 4.7.2 View a Record:

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.

#### 4.7.3 Delete a Record:

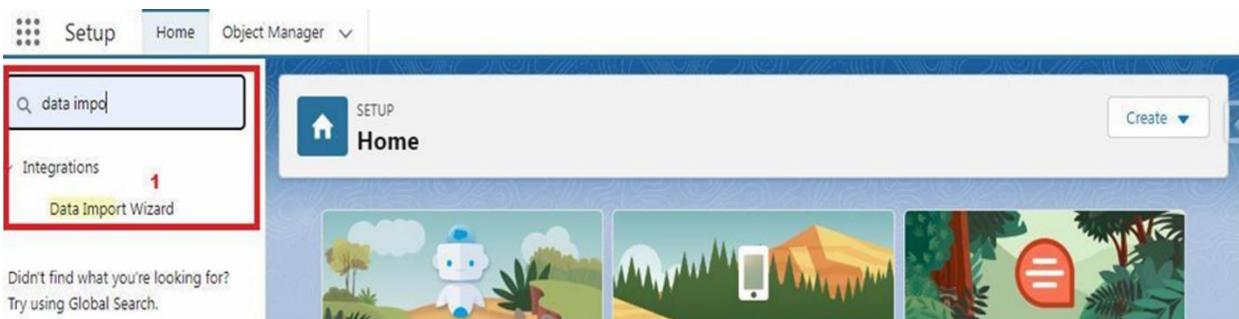
1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.
3. Click on the Employee Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete.

### 4.8 IMPORT DATA:

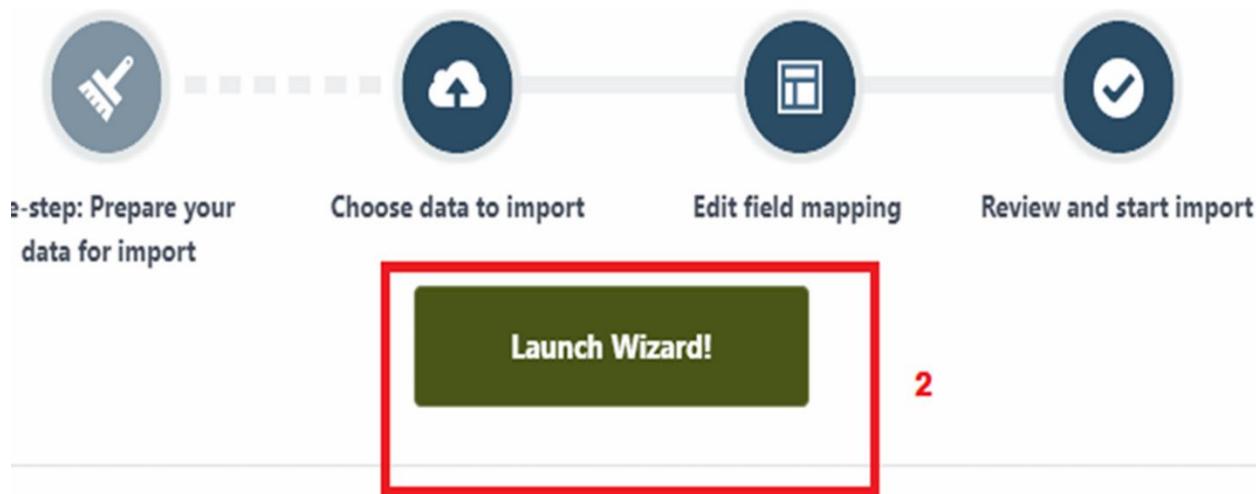
Data Import lets you upload data from external sources and combine it with data you collect via Analytics. You can then use Analytics to organize and analyze all of your data in ways that better reflect your business. The Data Import Wizard is a Tool makes it easy to import data for many standard Salesforce 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.

Save the file in CSV: <https://tinyurl.com/SF-Employee-Data>

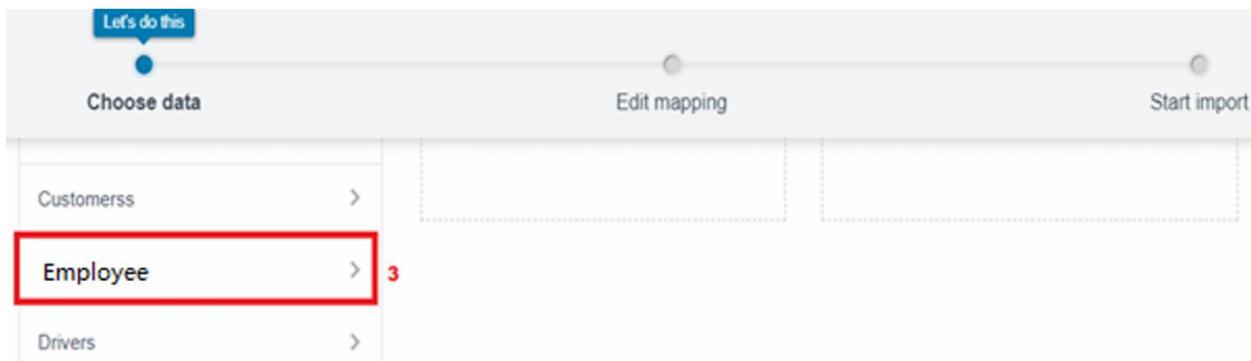
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



3. Click Launch Wizard!



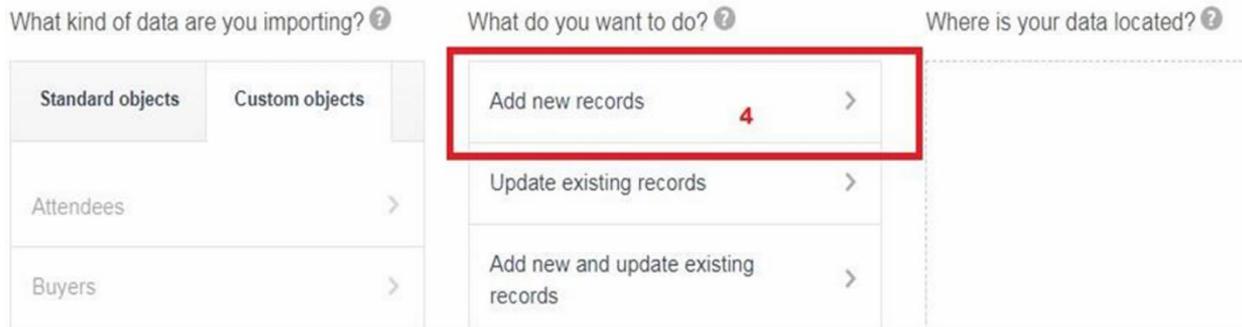
4. Click the Custom Objects tab and select the Employee object.



## 5. Select Add new records.

### Import your Data into Salesforce

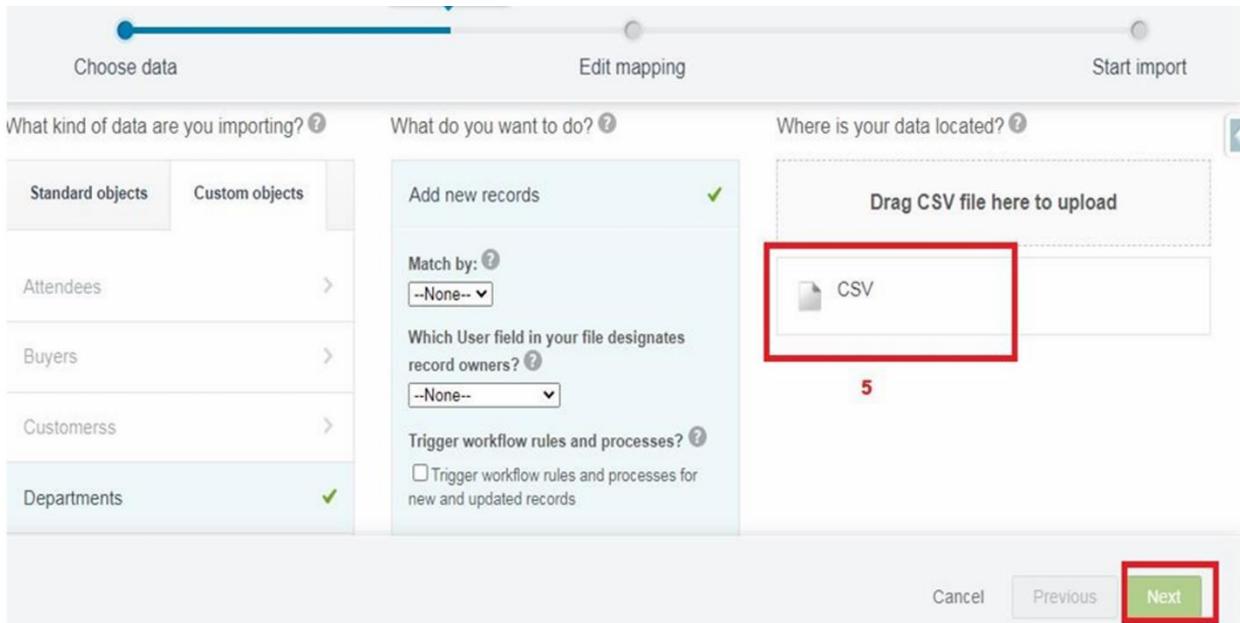
You can import up to 50,000 records at a time.



This screenshot shows the 'What do you want to do?' section of the import wizard. It has three tabs: 'Standard objects' (selected), 'Custom objects', and 'More objects'. Under 'Standard objects', there are options for 'Attendees' and 'Buyers'. In the center, a red box highlights the 'Add new records' option, which is step 4. Other options include 'Update existing records' and 'Add new and update existing records'.

## 6. Click CSV and choose file Employee\_CSV which we made earlier.

Click Next.

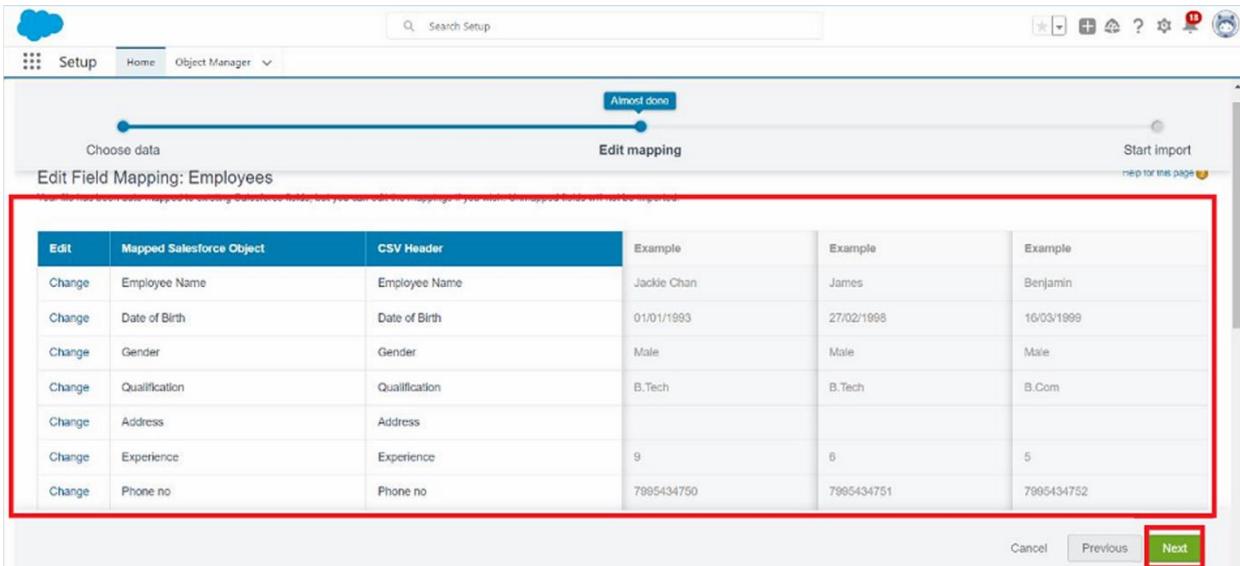


This screenshot shows the first step of the Smartbridge Data Import wizard. It has three main sections: "Choose data", "Edit mapping", and "Start import".

- Choose data:** Shows options for importing Standard objects or Custom objects. "Departments" is selected and highlighted with a green checkmark.
- Edit mapping:** Shows settings for adding new records, matching by user field, and triggering workflow rules. "Add new records" is selected and highlighted with a green checkmark.
- Start import:** Shows a section for uploading CSV files, with a red box highlighting the "CSV" file input area. A red number "5" is placed below the input area.

At the bottom right, there are "Cancel", "Previous", and "Next" buttons. The "Next" button is highlighted with a red border.

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.



This screenshot shows the second step of the Smartbridge Data Import wizard, titled "Edit Field Mapping: Employees".

The "Edit mapping" section displays a table comparing field names from the "CSV Header" with their corresponding "Mapped Salesforce Object" names. The table is highlighted with a large red box.

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	7905434750	7905434751	7905434752

At the bottom right, there are "Cancel", "Previous", and "Next" buttons. The "Next" button is highlighted with a red border.

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.

## 4.9 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.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot delete 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.

#### 4.9.1 Create HR profile:

1. Goto 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.

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

4. Scroll down and click on save.

#### **4.9.2 Create Manager profile:**

1. Goto 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.

#### **4.9.3 Create Employee profiles:**

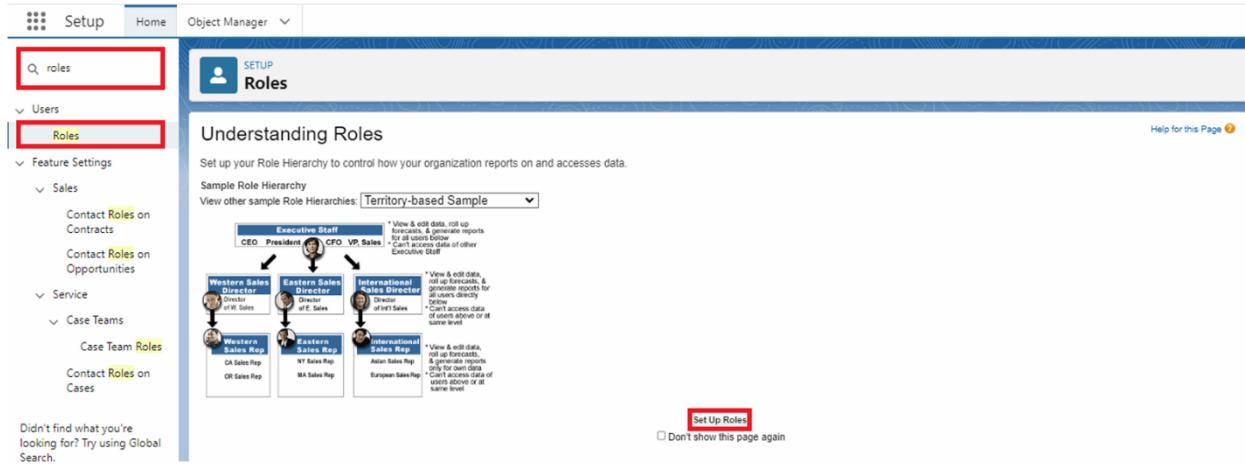
Create Employee Profiles for “On Site Employee”, “Remote Employee”, but in step 3 only allow permission access for Project and Project Task objects only.

#### **4.10 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.

## 4.10.1 Creating HR Role:

1. Goto quick find → Search for Roles → click on set up roles.



The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Users', the 'Roles' link is highlighted with a red box. On the main content page, there is a diagram titled 'Understanding Roles' illustrating a sample role hierarchy. At the bottom right of the page, the 'Set Up Roles' button is also highlighted with a red box.

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



The screenshot shows the 'Your Organization's Role Hierarchy' page. The 'Expand All' button at the top left is highlighted with a red box. Below it, the 'Nick Enterprises' organization structure is displayed. Under the 'CFO' node, the 'HR' node is expanded, and its 'Add Role' button is highlighted with a red box.

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

Role Edit  
New Role

Role Edit

Label	<input type="text"/>
Role Name	<input type="text"/> <small>(1)</small>
This role reports to	<input type="text"/> CEO <small>(1)</small>
Role Name as displayed on reports	<input type="text"/>

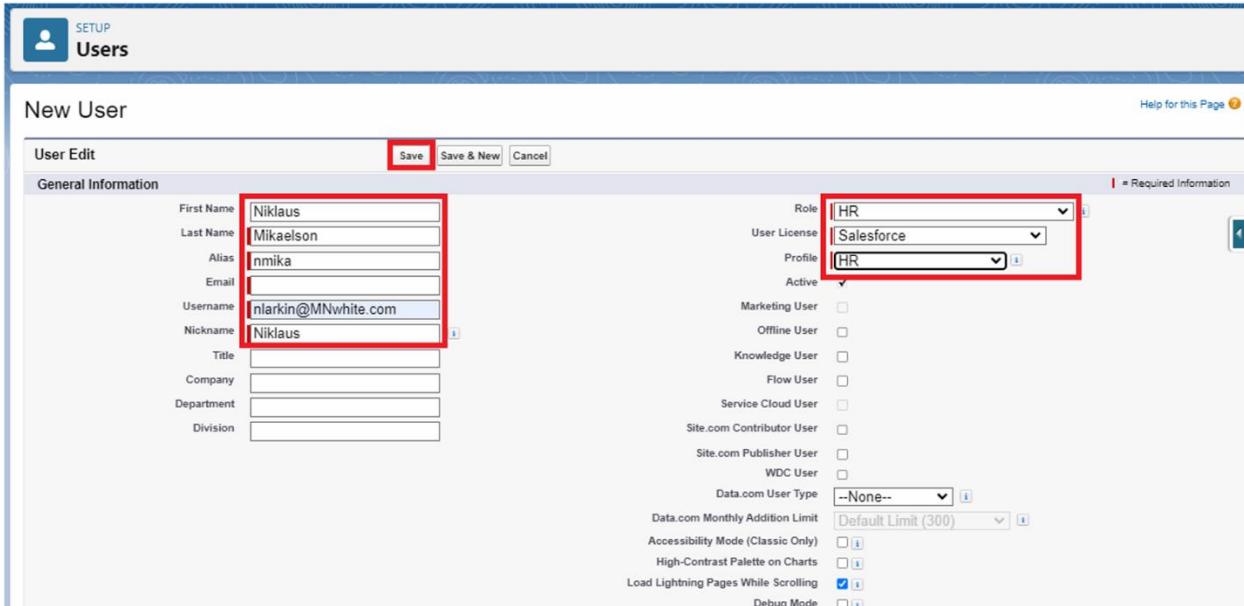
## 4.11 USERS:

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. Each user account contains at least the following:

- Username
- Email Address
- User's First Name (optional)
- User's Last Name
- Alias
- Nickname
- License
- Profile
- Role (optional)

## 4.11.1 Create User:

1. Goto setup → type users in quick find box → select users → click New user.
2. Fill in the fields.



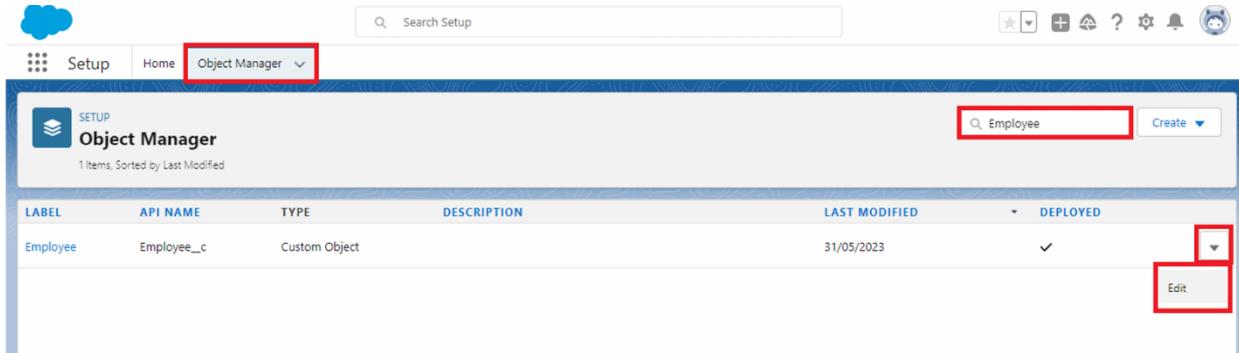
3. Save.

## 4.12 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.

## 4.12.1 Creating a Page layout:

1. Goto Setup → Click on Object Manager → Search for the object (Employee) → From drop down click on Edit.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar has 'Setup' and 'Object Manager' selected. A search bar shows 'Employee'. The main table lists one item: 'Employee' (Label), 'Employee\_\_c' (API Name), 'Custom Object' (Type). The 'Edit' button in the last column is highlighted with a red box. The status bar at the bottom right shows 'Edit'.

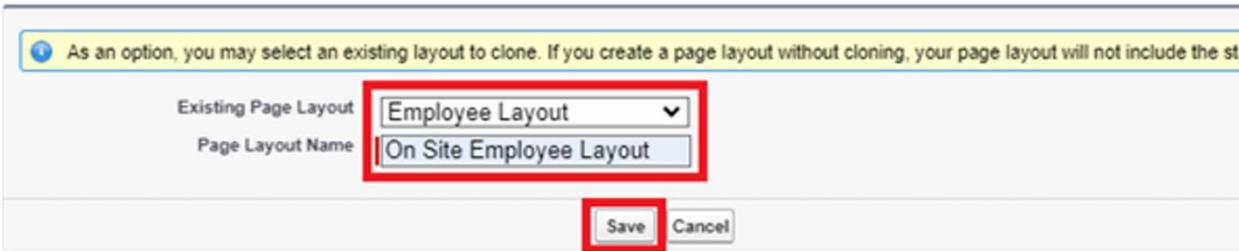
2. Click on Page layout → Click on New.



The screenshot shows the 'Page Layouts' section of the Employee Object Manager. The 'Page Layouts' tab is selected. The 'New' button in the top right is highlighted with a red box. The table shows one layout: 'Employee Layout' (Page Layout Name), 'Nick' (Created By), and 'Nick' (Modified By).

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

### Create New Page Layout



The screenshot shows the 'Create New Page Layout' dialog. It includes a note about cloning layouts. The 'Existing Page Layout' dropdown is set to 'Employee Layout' and the 'Page Layout Name' input field is set to 'On Site Employee Layout'. The 'Save' button at the bottom is highlighted with a red box.

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.

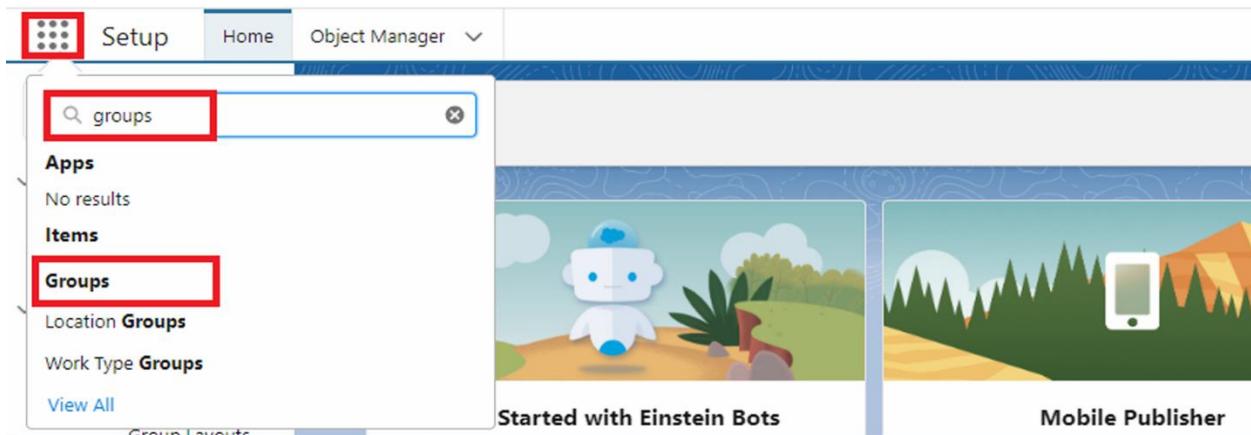
6. Similarly perform the above step to create “Allowances” and add allowances fields in it.
7. Click Save.

## 4.13 CHATTER GROUP:

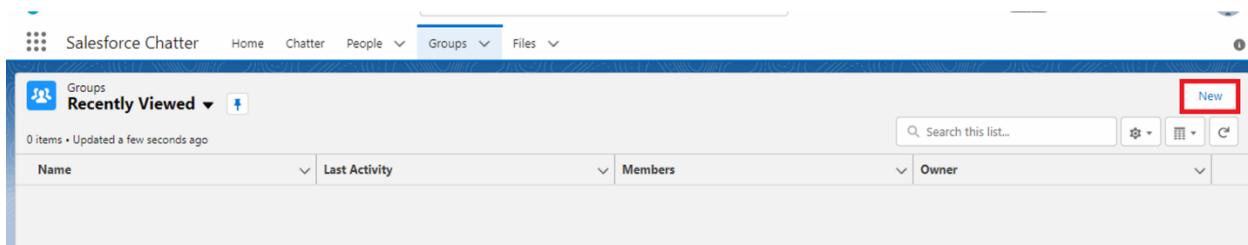
Salesforce Chatter Groups are collaborative spaces within the Salesforce platform that enable teams to communicate, share information, and collaborate on projects. They provide a centralized hub for discussions, file sharing, and updates, allowing users to stay connected, streamline workflows, and enhance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

### 4.13.1 Create a Chatter Group:

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

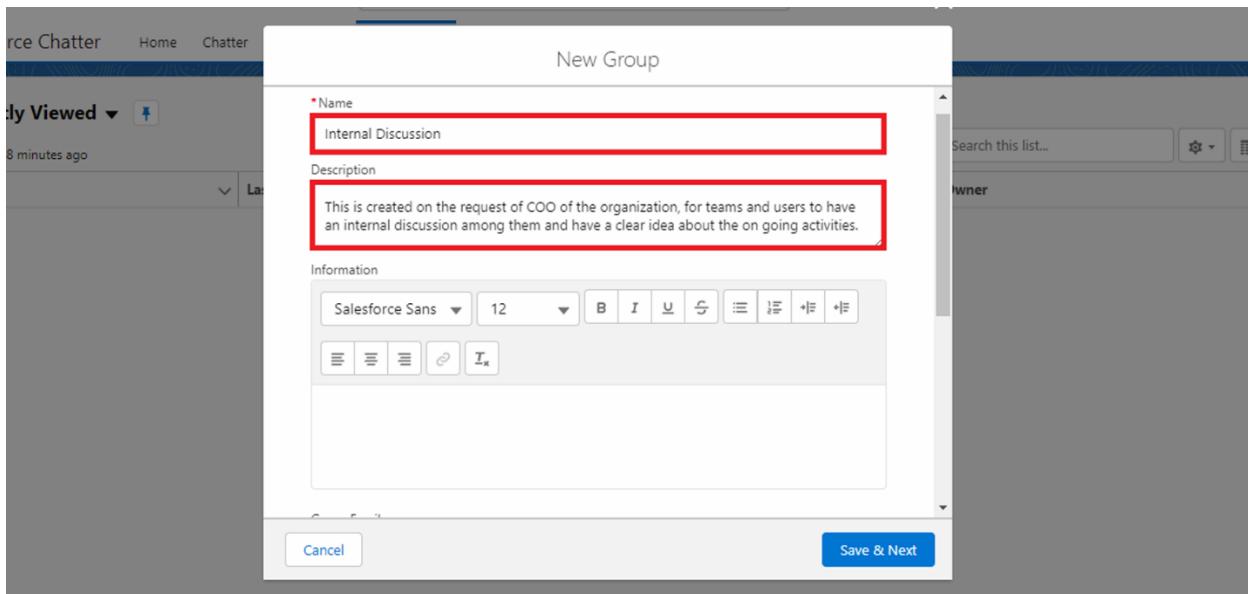


3. Click New.



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

- **Group Name:** Internal Discussion
- **Description:** Give an understanding Description on your own.
- **Access Type:** Private
- **Allow Customers:** Checked



New Group

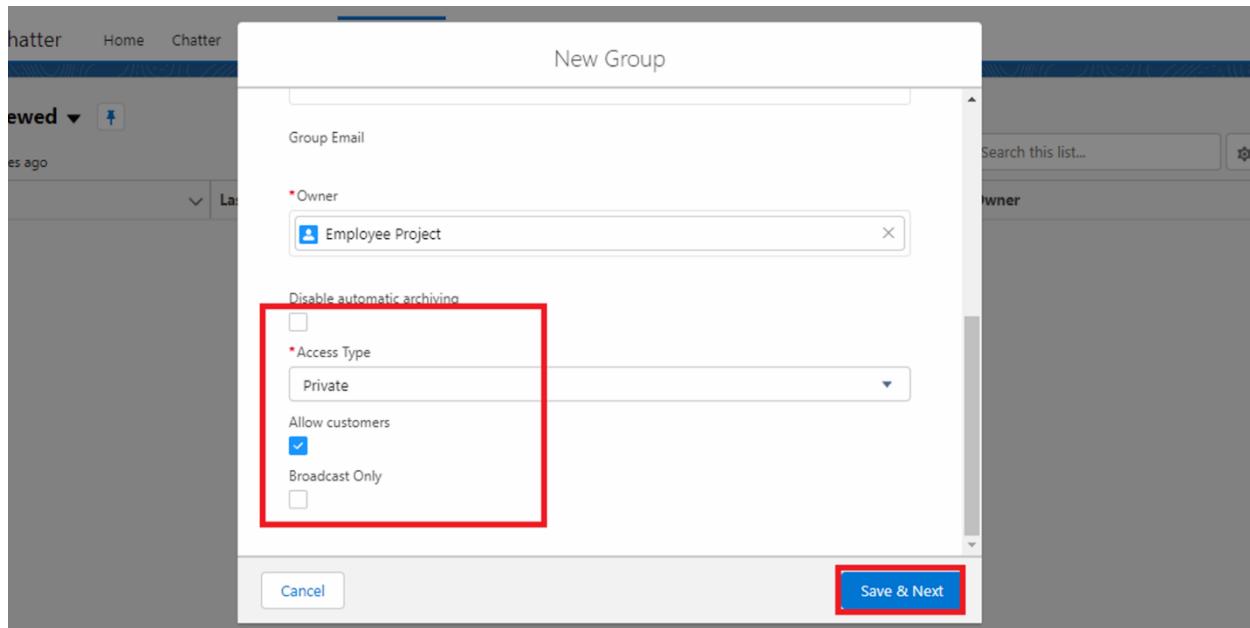
\*Name  
Internal Discussion

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

Cancel



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.
7. Click Done.

## 4.14 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.

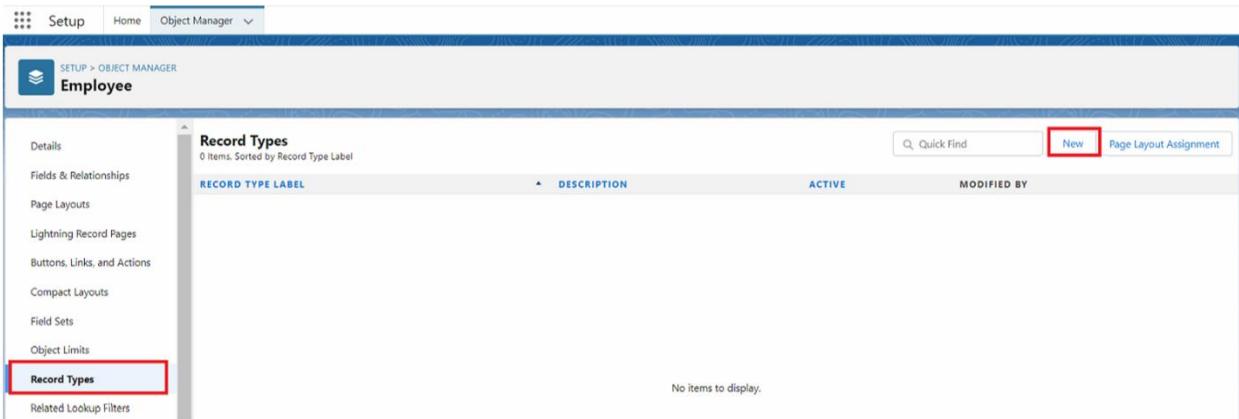
## 4.14.1 Create a Record Type:

1. Goto Setup → click on Object Manager → Search for the object (Employee) → from drop down click Edit.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A red box highlights the 'Object Manager' tab. The search bar at the top right contains the text 'Employee', also highlighted with a red box. Below the search bar, there is a 'Schema Builder' button and a 'Create' dropdown. The main table displays one item: 'Employee' (Label), 'Employee\_\_c' (API Name), 'Custom Object' (Type). The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. On the far right of the table, there is an 'Edit' button, which is highlighted with a red box. At the bottom right of the table area, there is a 'Delete' button.

2. From the left panel click Record Types → New.



The screenshot shows the 'Record Types' page for the 'Employee' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A red box highlights the 'Record Types' link under the 'Employee' section in the left sidebar. The main content area shows a table titled 'Record Types' with one item: '0 Items. Sorted by Record Type Label'. The table has columns for RECORD TYPE LABEL, DESCRIPTION, ACTIVE, and MODIFIED BY. A 'New' button is located at the top right of the table, highlighted with a red box. The message 'No items to display.' is visible below the table.

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

New Record Type  
**Employee**
[Help for this Page](#)

**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** | = Required Information

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

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

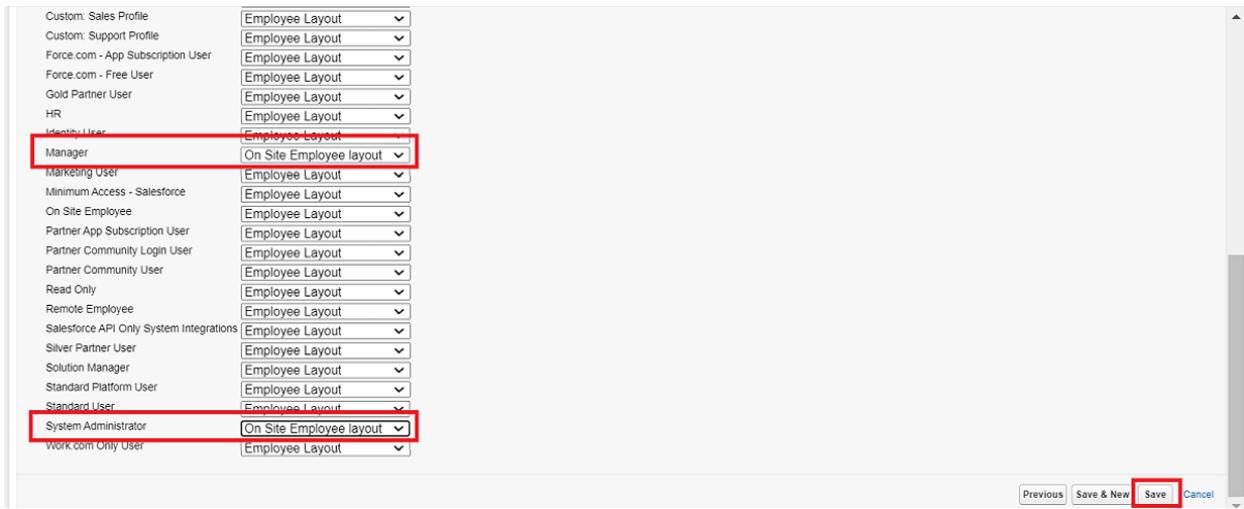
Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External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

4. Uncheck for “Make Available”.
5. Scroll down and check for the Manager & System Administrator profile and click on Next.
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"/>



User Type	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
<b>Manager</b>	<b>On Site Employee layout</b>
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
<b>System Administrator</b>	<b>On Site Employee layout</b>
Work.com Only User	Employee Layout

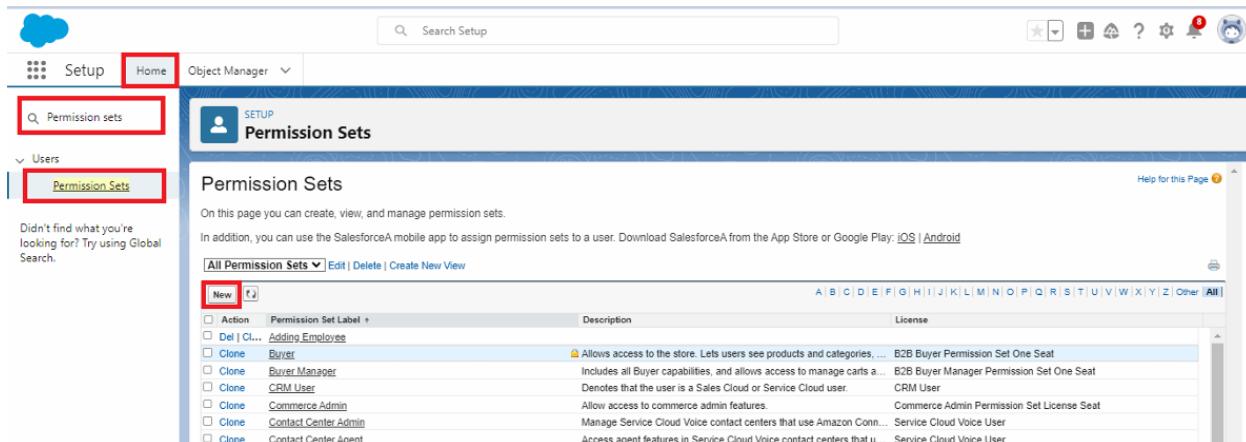
7. click Save.

## 4.15 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.

### 4.15.1 Create a Permission Set:

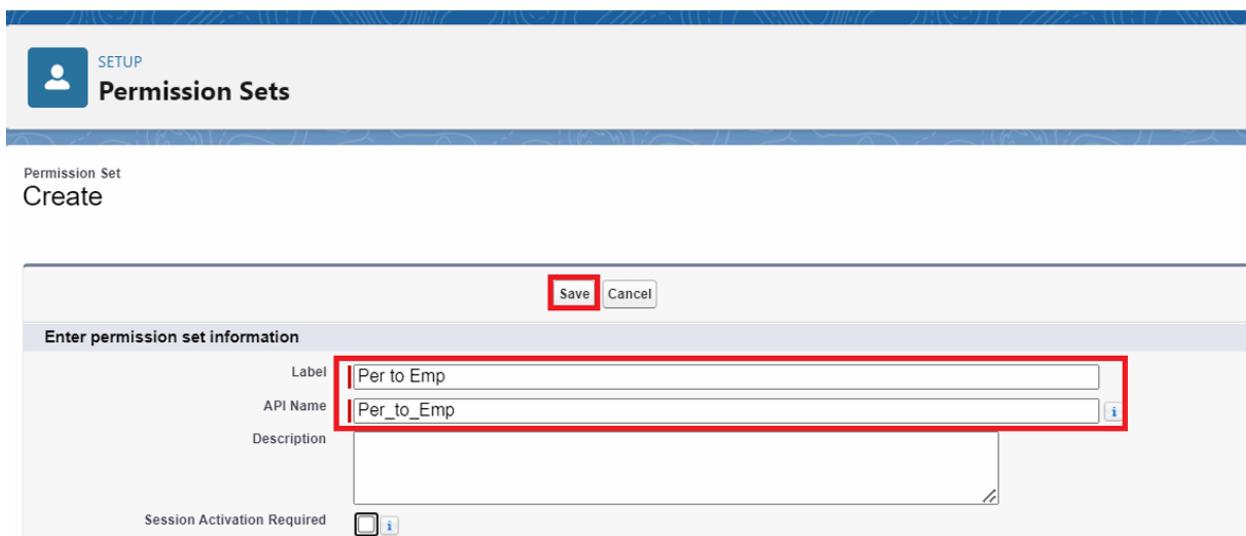
1. Goto setup → type “permission sets” in quick search → select permission sets → New.



The screenshot shows the Salesforce Setup Home page. The 'Permission sets' link in the sidebar is highlighted with a red box. The main content area displays a list of permission sets with columns for Action, Permission Set Label, Description, and License. A new permission set is being created, with the 'Label' field set to 'Per to Emp' and the 'API Name' field set to 'Per\_to\_Emp'. The 'Save' button is highlighted with a red box.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Del	Adding Employee	Allows access to the store. Lets users see products and categories....	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer	Includes all Buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	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

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



The screenshot shows the 'Create Permission Set' dialog box. The 'Label' field contains 'Per to Emp' and the 'API Name' field contains 'Per\_to\_Emp'. The 'Save' button is highlighted with a red box.

3. Under Apps Select object settings.

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

Permission Set  
Adding Employee

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

Permission Set Overview > Object Settings ▾ Employees ▾

Employees Save Cancel

Tab Settings

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

Employee: Record Type Assignments

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

Object Permissions

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

5. Click on Save.

6. After saving the permission click on the Manage assignment.

7. Now click on the Manage Assignment.

8. Click on Add Assignment.

Select Users to Assign

All Users ▾

1 item selected

Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Chatter Expert	Chatter	chatty.00d5i00000ewzcbea5.165fc3eew2or@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	
<input type="checkbox"/> demo project	dproj	nadeem@smart.com	<input checked="" type="checkbox"/>	System Administrator	
<input checked="" type="checkbox"/> Elijah Mikaelson	emika	elijah@smart.com	<input checked="" type="checkbox"/>	On Site Employee	
<input type="checkbox"/> Integration User	integ	integration@00d5i00000ewzcbea5.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	
<input type="checkbox"/> Jason Mikaelson	jmika	jason@smart.com	<input checked="" type="checkbox"/>	Remote Employee	
<input type="checkbox"/> Kol Mikaelson	kmika	kol@smart.com	<input checked="" type="checkbox"/>	Manager	
<input type="checkbox"/> Niklaus Mikaelson	nmika	nikmik@smart.com	<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.

## 4.16 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

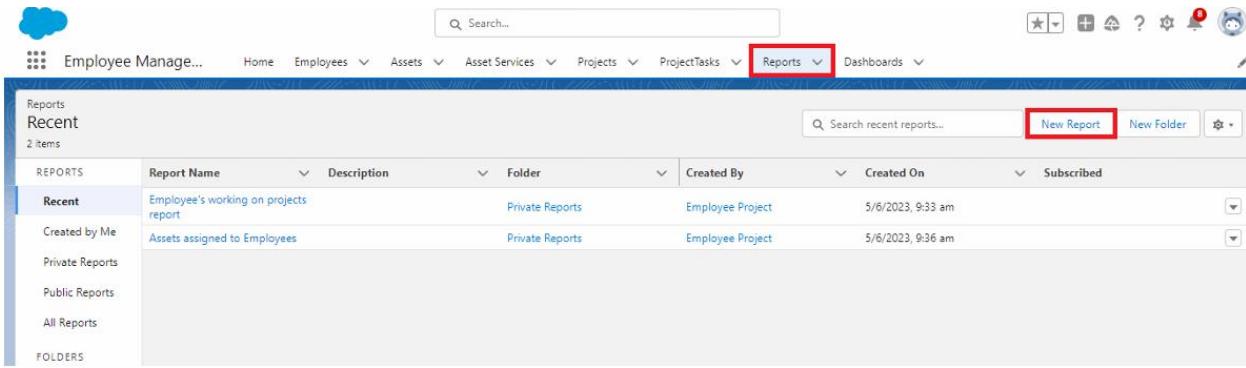
2. Summary

3. Matrix

4. Joined Reports

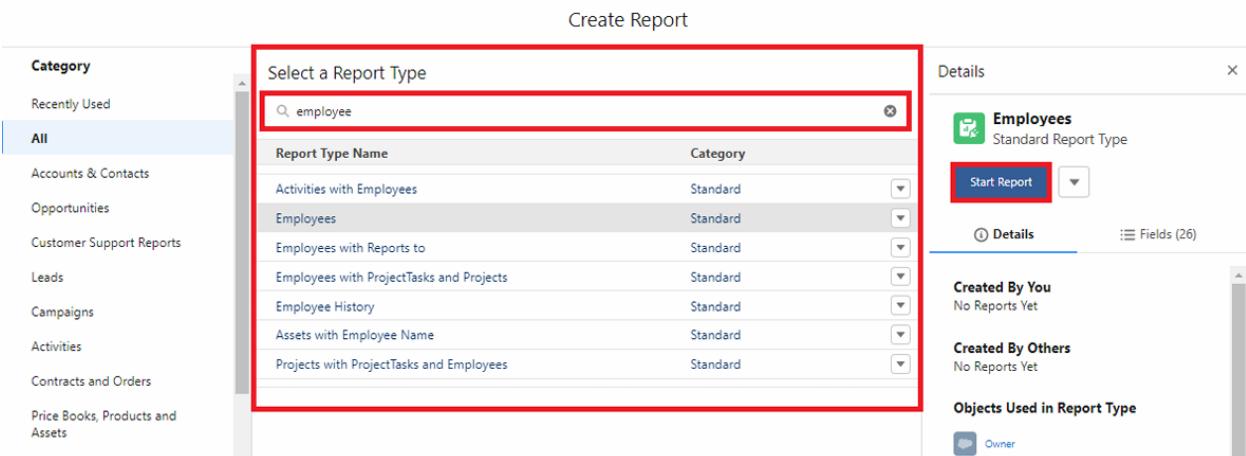
## 4.16.1 Create a Report:

1. Goto the app → click on the reports tab.
2. Click New Report.



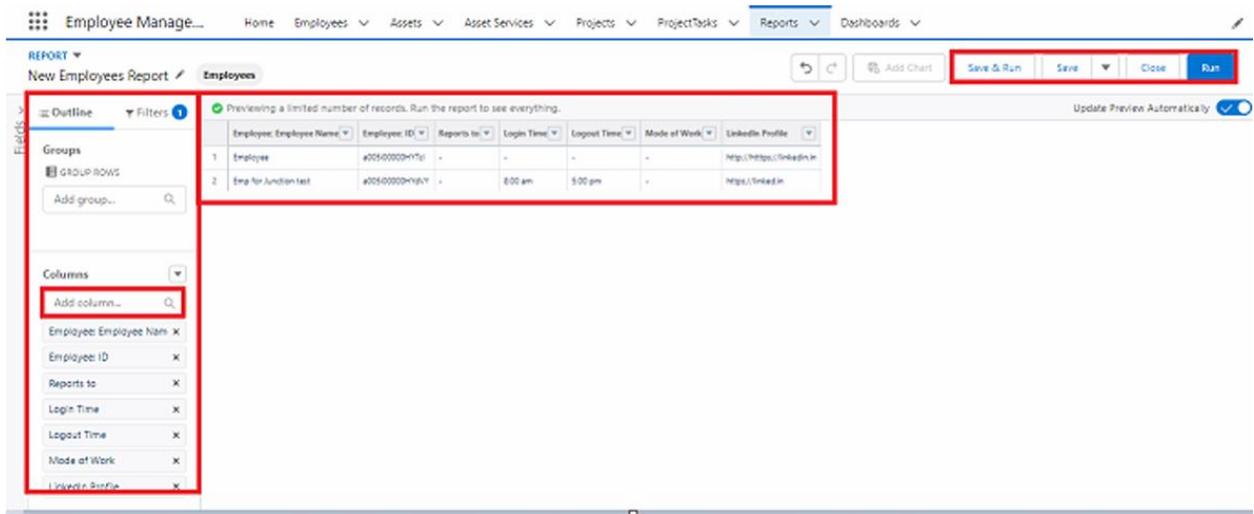
The screenshot shows the Salesforce Reports interface. At the top, there is a navigation bar with icons for Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports (which is highlighted with a red box), and Dashboards. Below the navigation bar is a search bar labeled 'Search...'. The main area displays a table of recent reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. There are also buttons for 'New Report' and 'New Folder'. On the left side, there is a sidebar with sections for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports) and Folders.

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



The screenshot shows the 'Create Report' dialog box. On the left, there is a sidebar with categories like Recently Used, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets. The 'All' category is selected. In the center, there is a search bar with the text 'employee' and a list of report types. The list includes: Activities with Employees, Employees, Employees with Reports to, Employees with ProjectTasks and Projects, Employee History, Assets with Employee Name, and Projects with ProjectTasks and Employees. On the right, there is a 'Details' panel for the 'Employees' report type. It shows the report name 'Employees', its category 'Standard', and a 'Start Report' button. Below the report name, there are sections for 'Created By You' (No Reports Yet) and 'Created By Others' (No Reports Yet). At the bottom, there is a section for 'Objects Used in Report Type' with a 'Owner' entry.

4. Customize your report.



The screenshot shows the 'Employee Management' application interface. On the left, there's a sidebar with 'Fields' sections for 'Groups' (with 'Add group...' option), 'Columns' (with 'Add column...' option), and 'Filters'. The main area displays a preview of a report titled 'New Employees Report' for the 'Employees' category. It lists two employees: 'Employee' (Employee ID: a05100000H7y) and 'Eng for Junction test' (Employee ID: a05100000H7yV). The columns shown are Employee Name, Employee ID, Reports to, Login Time, Logout Time, Mode of Work, and LinkedIn Profile. At the top right, there are buttons for 'Save & Run', 'Save', 'Close', and 'Run'. A checkbox for 'Update Preview Automatically' is checked.

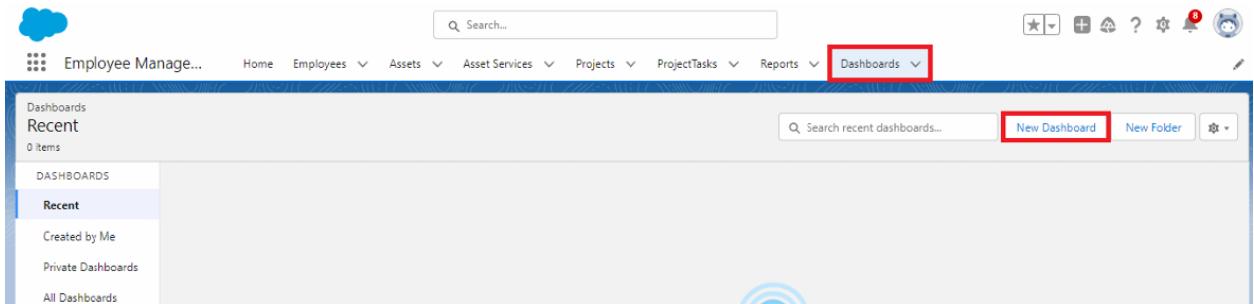
5. Save or run it.

## 4.17 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.

### 4.17.1 Create a Dashboard:

1. Goto the app → click on the Dashboards tabs.



The screenshot shows the Salesforce Dashboards interface. At the top, there's a navigation bar with tabs for Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports, and Dashboards. The 'Dashboards' tab is highlighted with a red box. Below the navigation, there's a search bar and a 'New Dashboard' button, both also highlighted with red boxes. The main area is divided into sections: 'DASHBOARDS' (with 'Recent' showing 0 items, 'Created by Me', 'Private Dashboards', and 'All Dashboards'), a central workspace, and a sidebar on the right with various icons.

2. Give a Name and click on Create.

### New Dashboard

\* Name

Description

Folder  
 Select Folder

Cancel Create

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

Reports and Folders ▾

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

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

Cancel Select

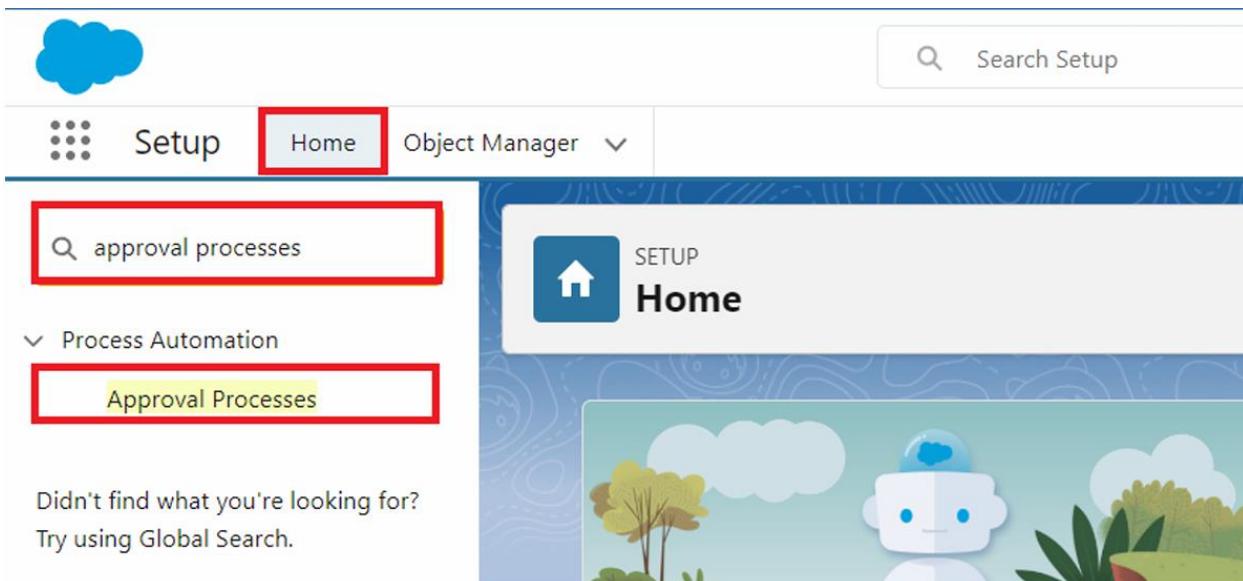
5. Click Add then click on Save and then click on Done.

## 4.18 APPROVAL PROCESS:

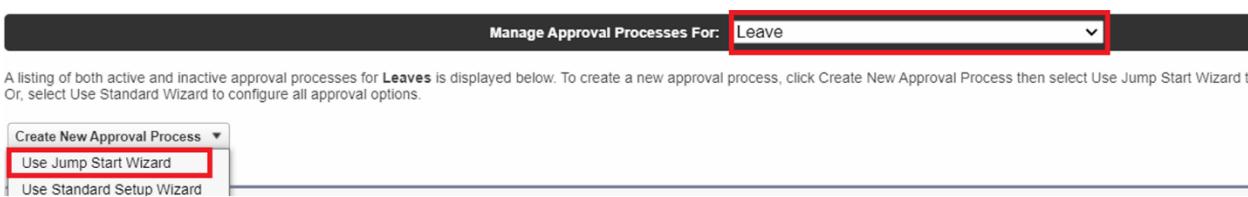
An Approval Process in Salesforce is a structured workflow that automates the process of approving records in an organization. This ensures a systematic review and approval mechanism, reducing manual effort and enhancing operational efficiency. Approval processes are particularly useful in HR and workforce management scenarios, such as managing leave requests, expense reimbursements, or employee promotions.

### 4.18.1 Create an Approval Process for Leave object:

1. Goto Setup → type Approval Processes in quick find → click on Approval Processes.



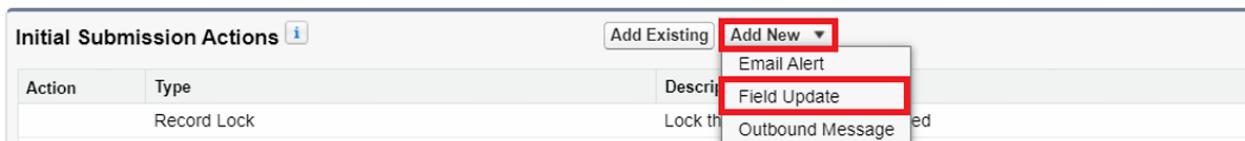
2. In the Manage Approval Processes For list, select Leave.



3. Click Create New Approval Process and select Use Jump Start Wizard.
4. Enter the following parameters.
  - **Name:** Leave Approval Request.
  - **Select Approver:** Select Automatically assign to approver(s) and for users select the name of the user with the Manager role.
5. Click Save.
6. Click View Approval Process Detail Page.

#### 4.18.2 Initial Submission Action:

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



2. Give name as “Approval Status to Submitted”. Select Status for the field to update. Under specify new field value select “A specific value” and select submitted and click Save.

**Field Update Edit**

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

**Identification**

Name	Approval Status to Submit	
Unique Name	Approval_Status_to_Submit	
Description		
Object	Leave	
Field to Update	Status	
Field Data Type	Picklist	
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>	

**Specify New Field Value**

**Picklist Options**

The value above the current one  
 The value below the current one  
 A specific value **Submit**

### 4.18.3 Approval Steps:

1. While you are still on Leave Approval Request detail page, under approval steps click the new approval step.
2. Give the name as “Approval from HR” and click on next.
3. Under specify step criteria select “Enter this step if the following (Criteria are met)”, Select field: “Leave: No. of Days”, Operator: equals Value: 5
4. Click next.
5. Under select approver: select Automatically assign to approver(s) and for users select the name of the user with the HR role.
6. Click on Save.
7. No, I'll do this later. Take me to the approval process detail page to review what I've just created and click Go.

#### **4.18.4 Final Approval Action:**

1. Under initial submission action click on add new and then select field update.
2. Give name as “Approval Status to Approved”. Select Status for the field to update. Under specify new field value select “A specific value” and select Approved and click Save.

#### **4.18.5 Final Rejection Action:**

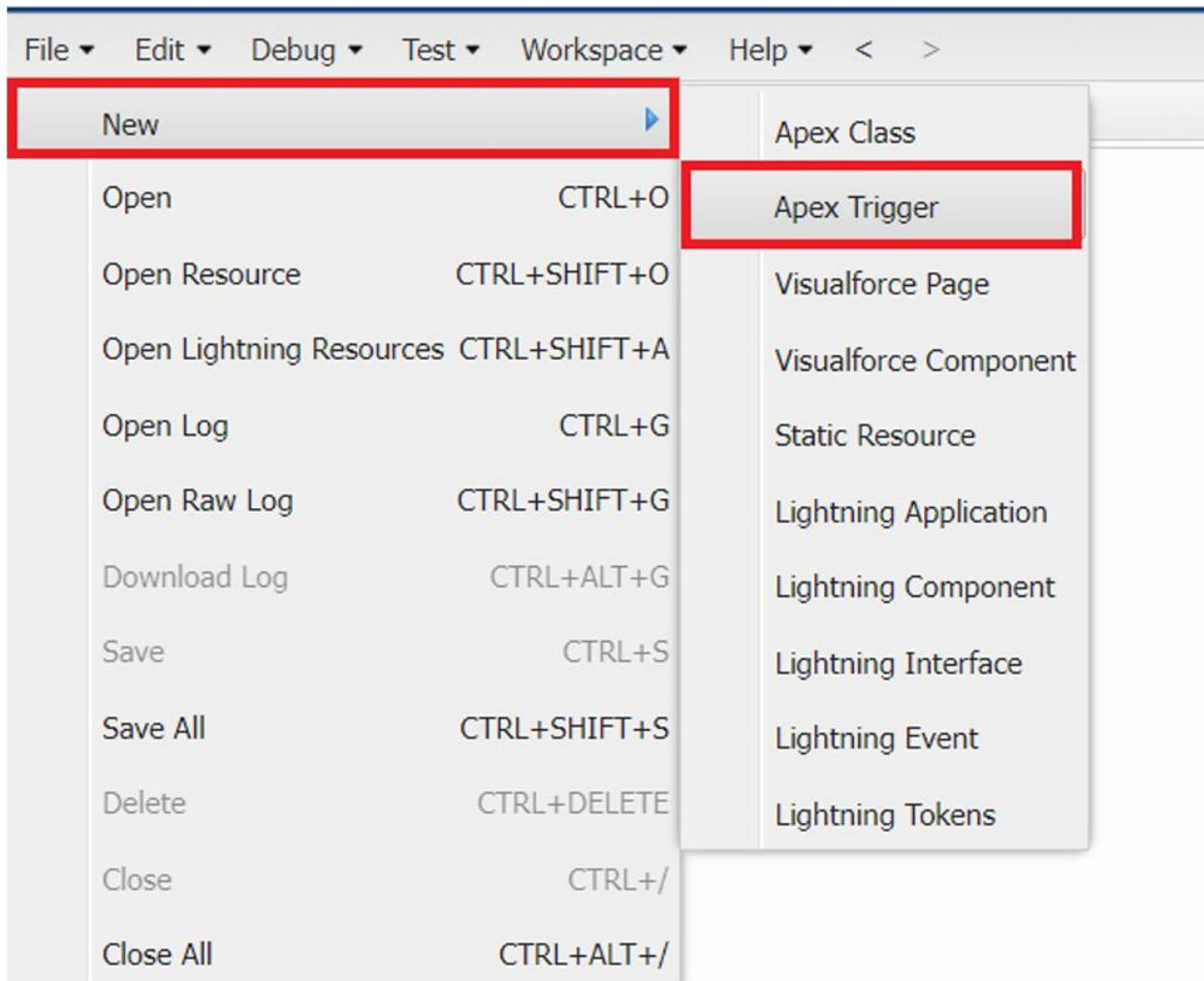
1. Under initial submission action click on add new and then select field update.
2. Give name as “Approval Status to Rejected”. Select Status for the field to update. Under specify new field value select “A specific value” and select Rejected and click Save.

### **4.19 APEX TRIGGER:**

Apex Triggers are pieces of Salesforce code that execute automatically before or after certain operations, such as creating, updating, or deleting records. They are primarily used to perform custom actions and enforce business logic in Salesforce when a record is manipulated. Apex Triggers enhance Salesforce functionality by allowing the execution of complex workflows that go beyond standard point-and-click configurations.

#### 4.19.1 Create an Apex Trigger:

1. Click on the file → New → Apex Class.



2. Give the Apex Trigger name as “EmpInsert”, and select “Employee\_\_c” from the dropdown for sObject.

## New Apex Trigger

Name:

sObject:

**Submit**

3. Click Submit.

4. Now write the code logic here.

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

EmpInsert.apxt API Version: 58

```
1 trigger EmpInsert on Employee__c (before insert) {
2     for(Employee__c pass : Trigger.New){
3         List<Employee__c> mynew = [SELECT Id, Name FROM Employee__c WHERE Employee_Name__c =: pass.Employee_Name__c];
4         if(mynew.size() > 0){
5             pass.Name.addError('Employee with same name is existing');
6         }
7     }
8 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name Line Problem

5. Save the code (click on file → Save).

## 5. TESTING AND VALIDATION:

### Unit Testing:

Test individual components such as Apex Classes, Triggers, and Validation Rules to ensure proper functionality.

### System Testing:

Simulate real-world scenarios, including workflow automations, to validate end-to-end integration and performance.

### User Interface Testing:

Ensure usability across different devices and roles, focusing on seamless navigation and error-free operations.

### Integration Testing:

Verify synchronization between Salesforce and third-party systems, including payroll tools and HR management platforms.

## 5.1 Testing the Trigger:

Create a record with the existing Employee Name say “Jackie Chan” you’ll face the error while saving the record saying “Employee with same name is existing”.

Information

Employee ID	Owner
Employee Name	demo project
Jackie Chan	Reports to
Gender	Search Employees...
--None--	Qualification
Experience	Phone no
Email	Mode of Work
	None--
Joining date	Time
	Start Time
LinkedIn Profile	End Time
Leave Days	Cancel
	Save & New
	Save

**We hit a snag.**

Review the errors on this page.

- Employee with same name is existing

Review the following fields

- [Employee ID](#)

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

### **Employee Onboarding:**

Automates the onboarding process, ensuring timely completion of tasks like document submission and training assignments.

### **Shift Management:**

Provides automated scheduling based on employee availability, skillsets, and organizational requirements.

### **Performance Tracking:**

Tracks individual and team performance metrics, enabling data-driven appraisals and training recommendations.

### **Leave and Attendance Management:**

Streamlines leave request approvals and monitors attendance trends for insights into workforce productivity.

### **Employee Grievance Handling:**

Manages and resolves HR issues with case management tools, improving employee satisfaction.

## 7. CONCLUSION:

The Workforce Administration Solution (Dev) successfully addresses challenges in workforce management by integrating advanced Salesforce features with customizations tailored to organizational needs. The solution delivers measurable improvements in operational efficiency, employee satisfaction, and HR process automation. By providing real-time analytics, self-service capabilities, and robust data management tools, the project sets the foundation for a scalable, adaptable, and future-ready workforce management platform. This initiative aligns with the organization's strategic objectives, ensuring long-term sustainability and growth.