

NAAN MUDHALVAN

PROJECT REPORT

SALESFORCE DEVELOPER

PROJECT TITTLE : WORKFORCE ADMINISTRATION SOLUTION

COLLEGE NAME : MAHENDRA ENGINEERING COLLEGE FOR WOMEN

TEAM MEMBERS

PAVITHRA M (611420104054)

DHIVYABHARATHI A (611420104018)

JAYASHREE T (611420104026)

NANDHINEESWARI D (611420104047)

COLLEGE SPOC

MANIMEGALAI M , M.E

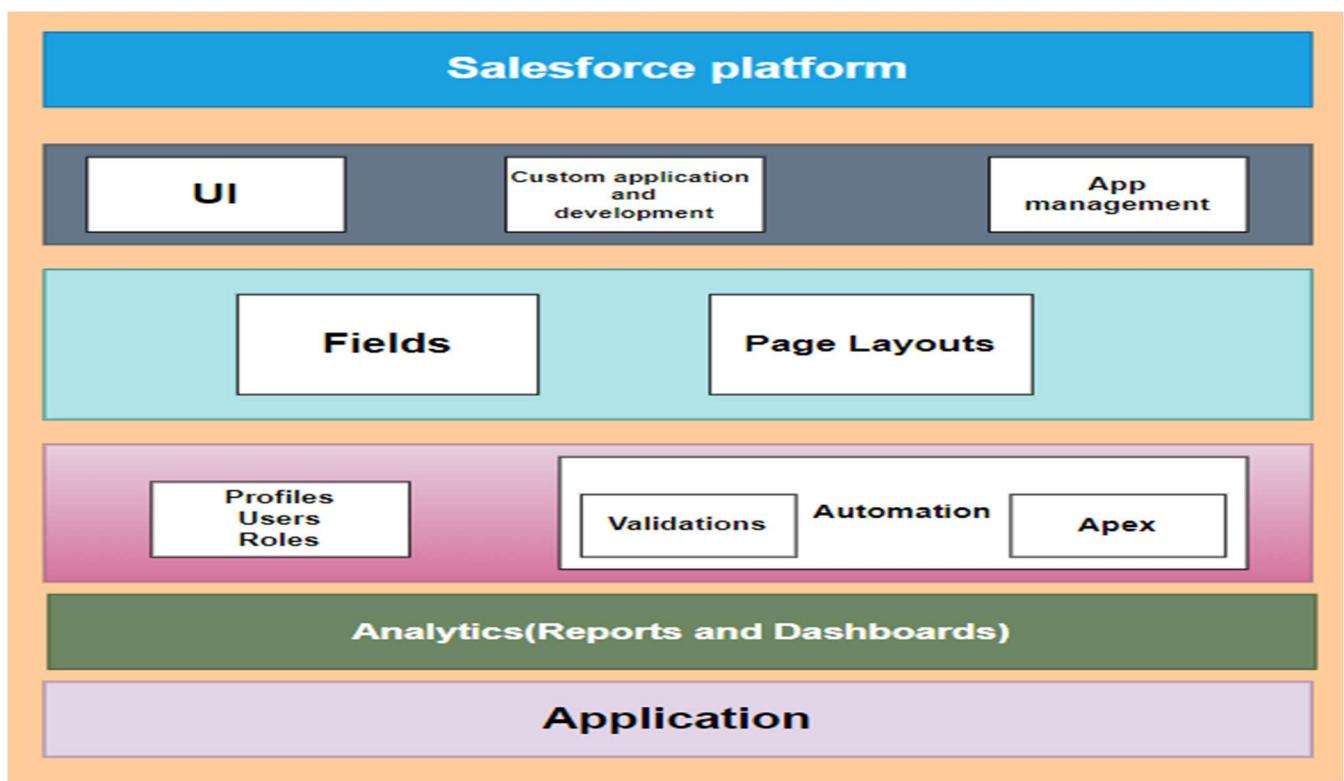
FACULTY MENTOR

KOWSALYA N , M.E

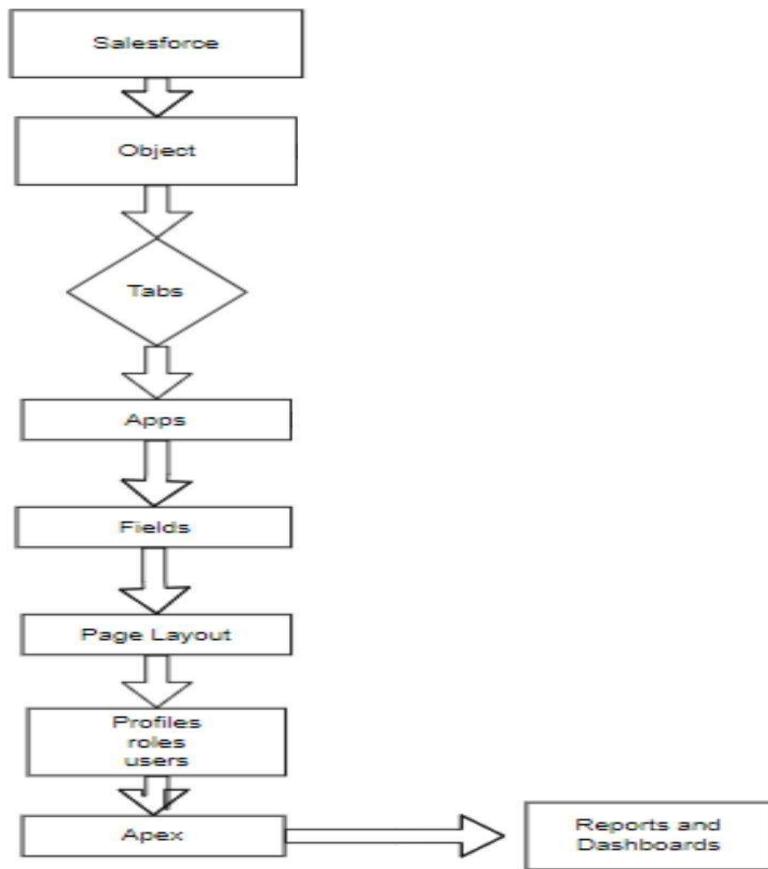
WORKFORCE ADMINISTRATION SOLUTION

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

Technical Architecture:



Project Flow:



System Requirements:

Windows 8 machine

Install with two web browser

Bandwidth of 30mbps

What you'll learn

1. Real Time Salesforce Project
2. Data Modelling
3. Creating an Application

4. User Interface Customization
5. Importing bulk amounts of data
6. Security in Salesforce
7. Group Collaboration
8. Reports & Dashboards

SALESFORCE

Introduction:

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

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

What Is Salesforce?

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

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3lGde5k>

Use Case:

Creating a Salesforce Developer Edition org allows developers to experiment, innovate, and build customized solutions within a controlled environment. With access to Salesforce's powerful development tools and features, developers can prototype, test, and refine their applications, empowering them to deliver robust and tailored solutions to meet unique business requirements. As a Salesforce Administrator for TheSmartBridge you must have a Salesforce developer edition org in order to do all the required works which the CEO desires for TheSmartBridge.

Before creating our developer account, we must know what are the types of Editions Salesforce offers.

Types of Salesforce Editions:

1	Essentials	Designed for small businesses getting started with CRM to boost sales or service productivity. It includes a setup assistant and administration tools to customize your deployment as you grow.
2	Professional	Designed for businesses requiring full-featured CRM functionality. It includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.
3	Enterprise	Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems.
4	Unlimited	Maximizes your success and extends it across the entire enterprise through the Lightning Platform. It gives you new levels of platform flexibility for

		managing and sharing all your information on demand. Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.
5	Developer	Provides access to the Lightning Platform and APIs. It lets developers extend Salesforce, integrate with other applications, and develop new tools and applications. Developer Edition also provides access to many of the features available in Enterprise Edition

Let's begin with creating our Salesforce Developer Account.

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

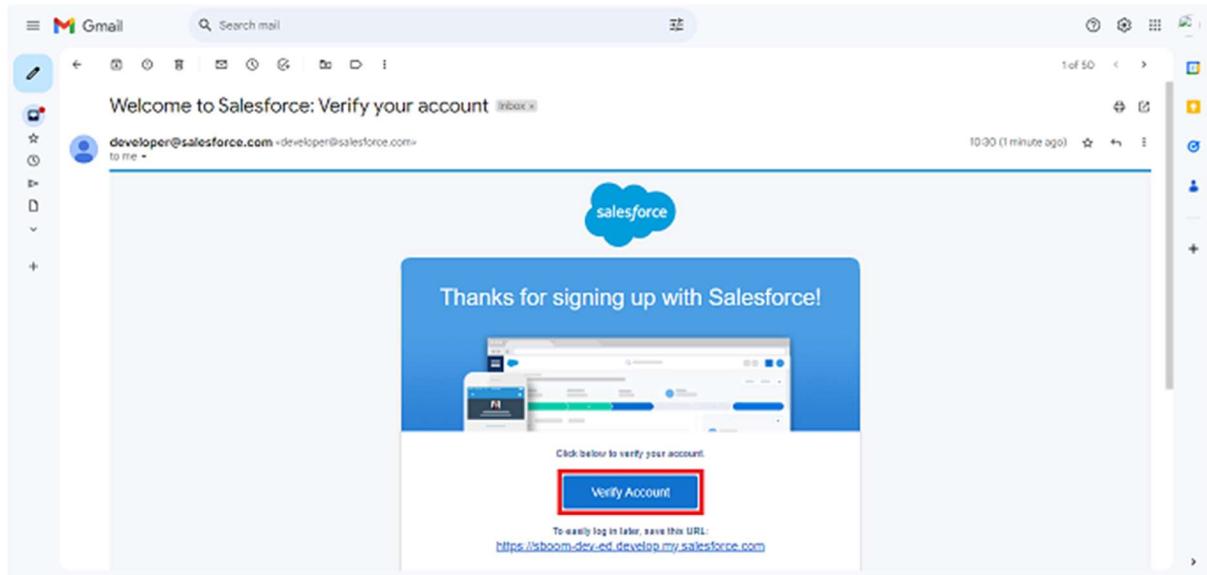
Click on sign me up after filling these.

Use Case:

In an effort to enhance data security and performance while simplifying system administration, TheSmartBridge company is transitioning to Salesforce, a new cloud technology. By leveraging this advanced platform, the company can ensure the safe storage of sensitive data through robust encryption and proactive backup mechanisms. The cloud's automated data replication capabilities provide added protection and efficient disaster recovery solutions. With access to scalable resources, TheSmartBridge can optimize performance, ensuring fast and reliable access to data. This shift to the new cloud technology streamlines administrative tasks, reducing complexity and allowing system administrators to focus on higher-value activities, ultimately increasing productivity and enhancing overall operational efficiency.

Account Activation

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



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

Change Your Password

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

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password
 Good

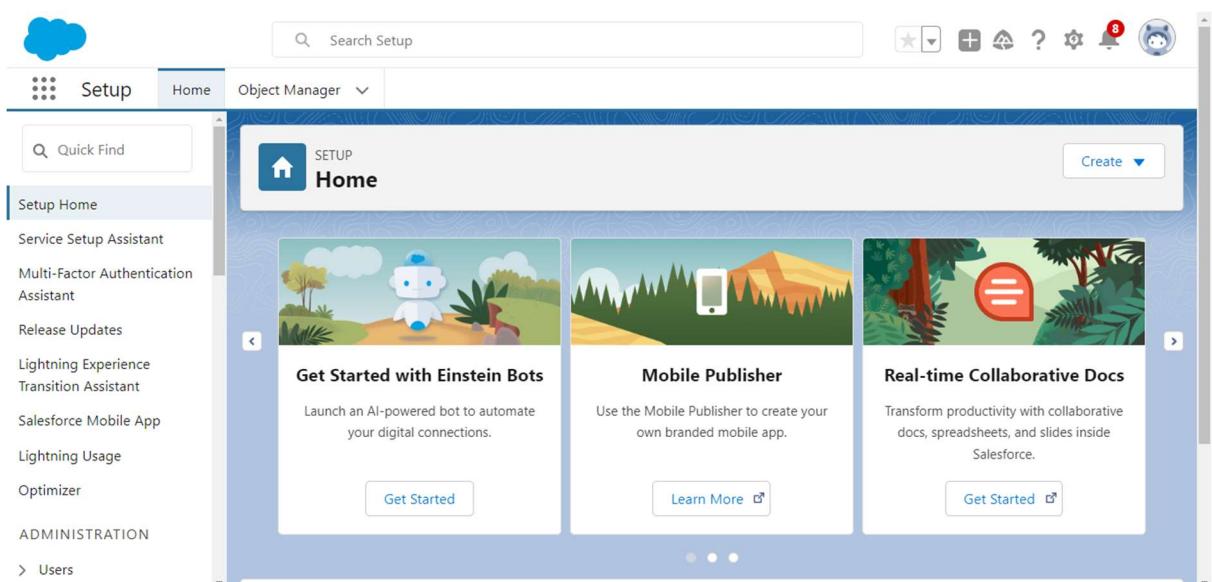
* Confirm New Password
 Match

Security Question

* Answer

Change Password

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



The screenshot shows the Salesforce Setup Home page. The top navigation bar includes a cloud icon, a search bar labeled "Search Setup", and various global buttons. The left sidebar contains links for "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", and "Optimizer". Under "ADMINISTRATION", there is a link for "Users". The main content area features a "Home" button with a house icon and the word "SETUP". Below it are three cards: "Get Started with Einstein Bots" (Launch an AI-powered bot to automate your digital connections), "Mobile Publisher" (Use the Mobile Publisher to create your own branded mobile app), and "Real-time Collaborative Docs" (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). Each card has a "Get Started" or "Learn More" button.

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:

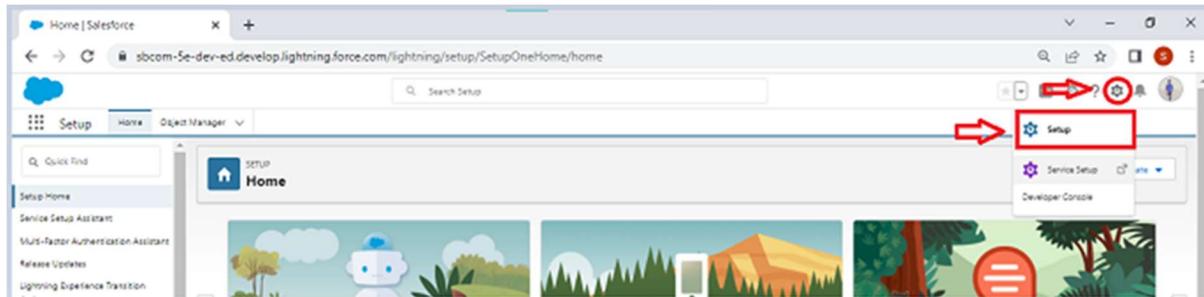
1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Use Case:

Creating an object in Salesforce organization is essential for efficient data management and process automation. By defining custom objects, businesses can structure and store data specific to their needs, enabling streamlined workflows, personalized reporting, and enhanced user experiences. Objects serve as the foundation for organizing and leveraging critical information within Salesforce. As an Admin for TheSmartBridge, It's your responsibility to store the data as per the organization needs.

To Navigate to Setup page:

Click on gear icon ? click setup.



Create Employee Object

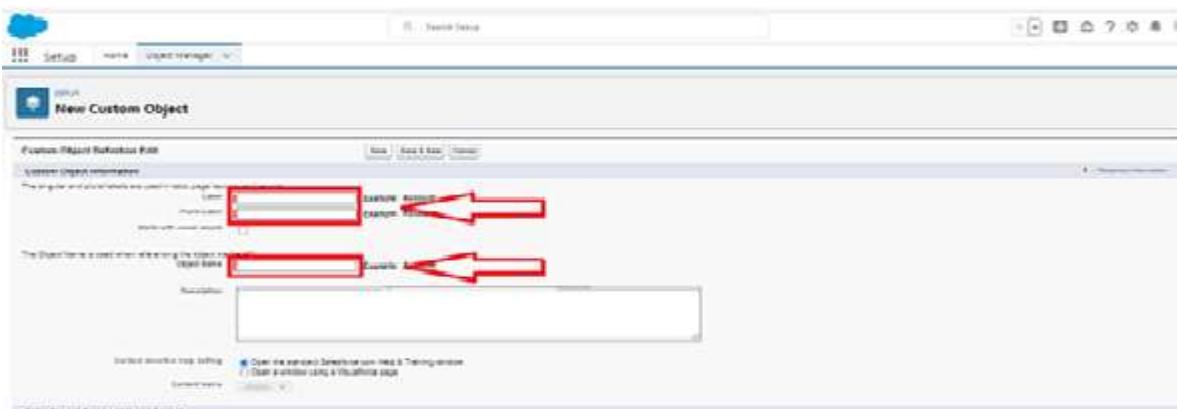
The purpose of creating an Employee custom object is to keep track the employee's activities and their individual and as well as team progress.

To create an object:

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



1. Enter the label name>>> Employee
2. Plural label name>>> Employees



3. Enter Record Name Label and Format

- Record Name >>> Employee ID
- Data Type >>> Auto Number
- Display Format >>> EMS-{0000}
- Starting Number >>> 1

Enter Record Name Label and Format

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

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

2. Click on Allow reports,

3. Allow search >>> Save.

Optional Features

Allow Reports **←**

Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing [\[?\]](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search **←**

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

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

↑ ↓

Create Project Object

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

To create an object:

1. From the setup page >>> Click on Object Manager >>> Click on Create >>> Click on Custom Object.
 1. Enter the label name >>> Project
 2. Plural label name >>> Projects
 3. Enter Record Name Label and Format
 - Record Name >>> Project ID
 - Data Type >>> Auto Number
 - Display Format >>> Proj-{0000}
 - Starting Number >>> 1
2. Click on Allow reports,
3. Allow search >>> **Save**

TABS

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

Types of Tabs:

1. Custom Tabs

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

2. Web Tabs

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

3. Visualforce Tabs

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

4. Lightning Component Tabs

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

5. Lightning Page Tabs

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

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

Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Use Case:

Creating Objects and storing TheSmartBridge organization's data is the very first step in the requirements they want. Now to access the stored data by an employee from the organization Admin needs to create Tabs. By designing a dedicated Tab, businesses can improve user experience, simplify navigation, and provide quick access to critical information, enhancing productivity and ensuring efficient utilization of Salesforce's capabilities.

Creating A Custom Tab

To create a Tab:(Employee)

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

Custom Tabs

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

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

The screenshot shows two sections of the Salesforce setup interface. The top section is titled 'Custom Object Tabs' and contains a 'New' button and a link 'What Is This?'. Below this is a message: 'No Custom Object Tabs have been defined'. The bottom section is titled 'Web Tabs' and also contains a 'New' button and a 'What Is This?' link. Below this is a message: 'No Web Tabs have been defined'.

2. Select Object(Employee) >>> Select any tab style >>>

Next (Add to profiles page) keep it as default>>>Next (Add to Custom App) keep it as default >>> Save.

This screenshot shows the 'Create New Custom Tab' dialog box. At the top, it says 'Choose the custom object for this new custom tab. Fill in other details.' Below this, there's a section for selecting an object. A dropdown menu is open under 'Object', showing options like '-None--', 'Asset', 'Asset Service', and 'Employee'. The 'Employee' option is highlighted with a red box. There's also a note '(Optional) Choose a Home Page Custom Link' with options 'Project', 'ProjectCustomLink', and 'ProjectTask'. Below the object selection, there's a 'Description' field with a placeholder 'Enter a short description.' At the bottom right, there are 'Next' and 'Cancel' buttons, with 'Next' also having a red box around it.

To Create A Tab:(Project)

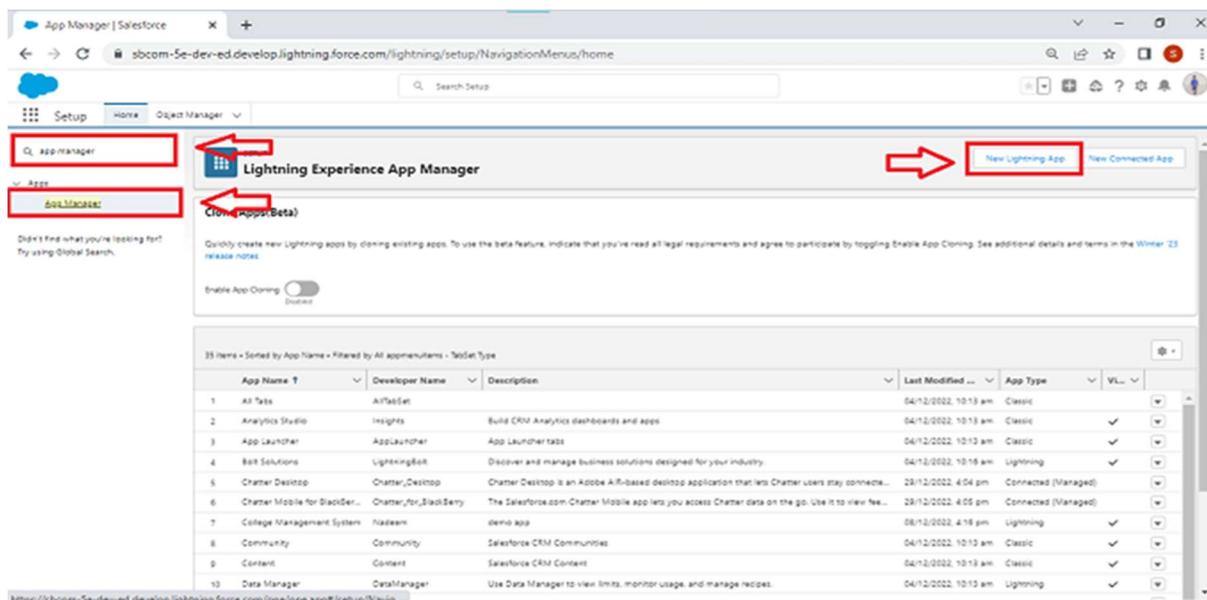
1. Go to setup page >>> type Tabs in Quick Find bar >>> click on tabs >>> New (under custom object tab)
2. Select Object(Project) >>> Select the tab style >>> Next (Add to profiles page) keep it as default >>> Next (Add to Custom App) keep it as default >>> Save.

THE LIGHTNING APP

Create A Lightning App

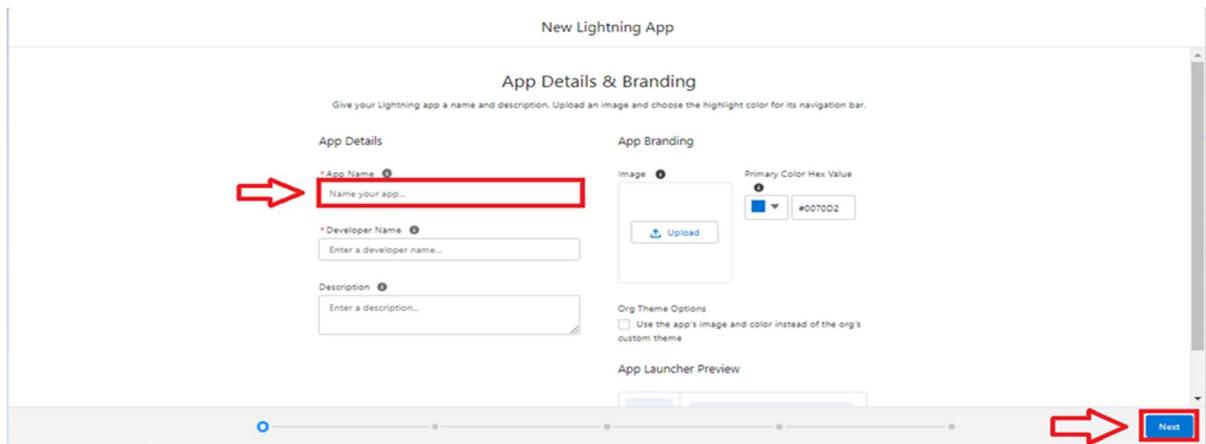
To create a lightning app page:

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

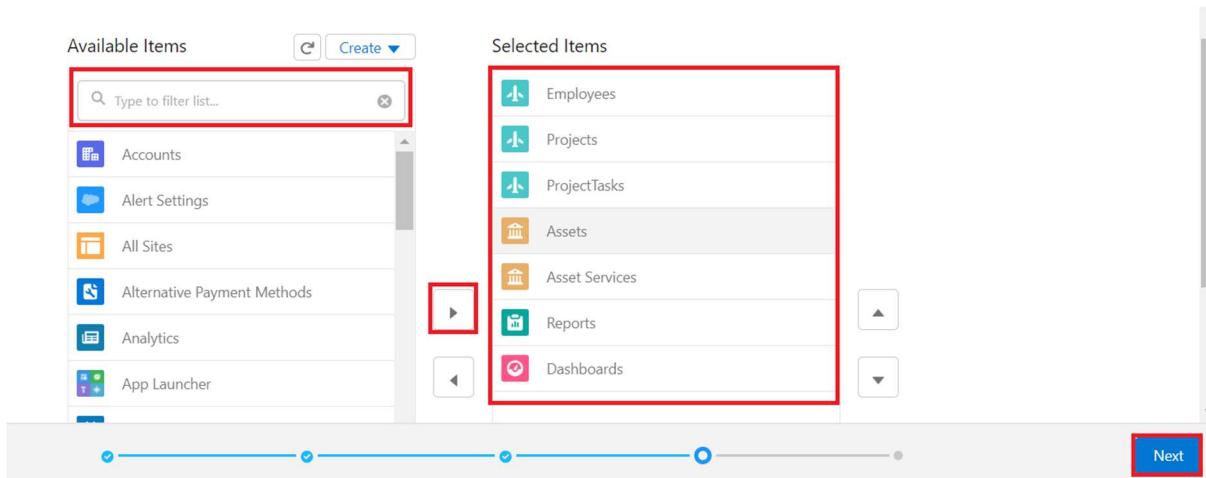


2. Fill the app name in app details and branding as follow
App Name : Workforce Administrator Solution
Developer Name : this will auto populated
Description : Give a meaningful description
Image : optional (if you want to give any image you can otherwise not mandatory)
Primary color hex value : keep this default
3. Then click Next >>> (App option page) keep it as default >>> Next >>> (Utility Items) keep it as default >>> Next.

4.



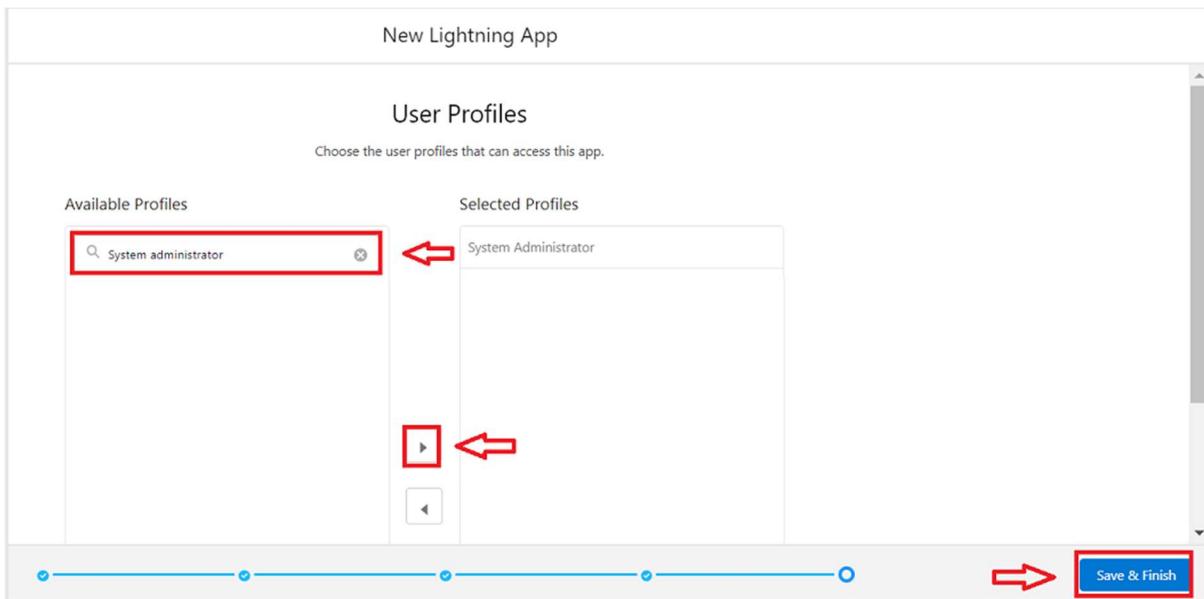
5. To Add Navigation Items:



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

6. To Add User Profiles:



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

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.

Use Case:

Now it's time for you to think out of the box for your organization. You have successfully created the database objects for the organization but now all eyes turn on you as you have to define what sort of information

the objects store which you have created. As a life saver of your organization you come up with the idea of creating fields to store different types of data.

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.

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	CreatedById	Lookup(User)		
Employee ID	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

3. Select Data type as “Text”.

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

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

4. Click on Next

The screenshot shows the 'Step 2. Enter the details' page for creating a new custom field. The page has a header 'Employee New Custom Field' and a top bar with 'Help for this Page' and 'Step 2 of 4'. The main area contains fields for 'Field Label' (Employee Name), 'Length' (18), 'Field Name' (Employee_Name), and a 'Description' text area. The 'Field Label' and 'Length' fields are highlighted with red boxes and arrows pointing to them. The 'Next' button is also highlighted with a red box and an arrow.

5. Fill the above as following:

- o Field Label: Employee Name
- o Length : 18
- o Field Name : gets auto generated
- o 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.

The screenshot shows a 'Select Data Type' dialog box. It lists five options: 'Checkbox', 'Currency', 'Date', 'Date/Time', and 'Email'. The 'Date' option is selected and highlighted with a red box. A tooltip for 'Date' states: 'Allows users to enter a date or pick a date from a popup calendar.' Other options have their descriptions below them.

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 [i]

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

Functions

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Creating Remaining Fields In Employee Object

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

S	Object	Field																
1 N o	Name																	
		<table border="1"><thead><tr><th>Field Name</th><th>Data type</th></tr></thead><tbody><tr><td>• Qualification</td><td>Text</td></tr><tr><td>• Address</td><td>Text Area</td></tr><tr><td>• Experience</td><td>Text Area</td></tr><tr><td>• Phone no</td><td>Phone</td></tr><tr><td>• Email</td><td>Email</td></tr><tr><td>• Joining date</td><td>Date</td></tr><tr><td>• Mode of Work</td><td>Picklist: Values On Site Remote</td></tr></tbody></table>	Field Name	Data type	• Qualification	Text	• Address	Text Area	• Experience	Text Area	• Phone no	Phone	• Email	Email	• Joining date	Date	• Mode of Work	Picklist: Values On Site Remote
Field Name	Data type																	
• Qualification	Text																	
• Address	Text Area																	
• Experience	Text Area																	
• Phone no	Phone																	
• Email	Email																	
• Joining date	Date																	
• Mode of Work	Picklist: Values On Site Remote																	

		<ul style="list-style-type: none"> • Cab Allowance • Food Allowances • Wifi Allowances • Cab Allowance Amount • Food Allowance Amount • Wifi Allowance Amount • Login Time • Logout Time • LinkedIn Profile 	Check box Check box Check box Currency Currency Currency Time Time url				
1	Employee						
2	Project	<table border="1"> <thead> <tr> <th>Field Name</th><th>Data type</th></tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> • Project Name • Project Lead • Start Date • End Date • Project Status </td><td> Text Text Date Date Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Completed On Going Not Yet Started </div> </td></tr> </tbody> </table>	Field Name	Data type	<ul style="list-style-type: none"> • Project Name • Project Lead • Start Date • End Date • Project Status 	Text Text Date Date Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Completed On Going Not Yet Started </div>	
Field Name	Data type						
<ul style="list-style-type: none"> • Project Name • Project Lead • Start Date • End Date • Project Status 	Text Text Date Date Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Completed On Going Not Yet Started </div>						

		Field Name	Data type
3	Project Task	<ul style="list-style-type: none"> • Project Task • Finishes in • Working Hours • Employee 	<p>MDR with project object</p> <p>Formula : $(\text{Project_Task_r.Start_Date_c} - \text{Project_Task_r.End_Date_c})$</p> <p>Formula return type: Number</p> <p>Numbers</p> <p>Master Detail relationship with Employee object</p>

		<table border="1"> <tr> <td>Name</td><td></td></tr> </table> <p>Note: here in Finishes in field, Start Date and End Date belong to Employee Object.</p>	Name			
Name						
4	Asset Service	<table border="1"> <thead> <tr> <th>Field Name</th><th>Data type</th></tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> Asset Id Type Technician Subject Description </td><td> Lookup relationship with Asset object Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Technical Issue Non Technical Issue </div> Text Text Area Text Long </td></tr> </tbody> </table>	Field Name	Data type	<ul style="list-style-type: none"> Asset Id Type Technician Subject Description 	Lookup relationship with Asset object Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Technical Issue Non Technical Issue </div> Text Text Area Text Long
Field Name	Data type					
<ul style="list-style-type: none"> Asset Id Type Technician Subject Description 	Lookup relationship with Asset object Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Technical Issue Non Technical Issue </div> Text Text Area Text Long					
		<table border="1"> <thead> <tr> <th>Field Name</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>Asset Type</td><td>Picklist: Values</td></tr> </tbody> </table>	Field Name	Data type	Asset Type	Picklist: Values
Field Name	Data type					
Asset Type	Picklist: Values					

5	Asset	<ul style="list-style-type: none"> • Model Name • Employee Name • Date Of Issue 	<p>Laptop Charger Mouse Monitor CPU</p> <p>Text Lookup relationship with Employee Object Formula (Joining date) Formula Return type: date</p> <p>Note: here in the Date of Issue field, the Joining date field belongs to the Employee Object.</p>

Master-Detail Relationship

Creating Master-Detail Relationship between Employee & ProjectTask 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.

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

Use Case:

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 interface. In the top navigation bar, 'Setup' is selected. The 'Sharing Settings' page is displayed, featuring a search bar with 'sharing settings' and a sidebar with 'Sharing Settings' under the 'Security' section. A message at the bottom left says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Sharing Settings' and contains a table for 'Organization-Wide Defaults'. The table has columns for 'Object', 'Default Internal Access', and 'Default External Access'. The objects listed are Lead, Account and Contract, Contact, Order, Asset, and Opportunity. The 'Edit' button for the table is highlighted with a red box. The 'Default Internal Access' column shows values like 'Public Read/Write/Transfer' for Lead and 'Controlled by Parent' for Contact. The 'Default External Access' column shows values like 'Private' for Lead and 'Controlled by Parent' for Contact.

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.



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

Set OWD

7. Set OWD as Private for Project and Asset Service objects.

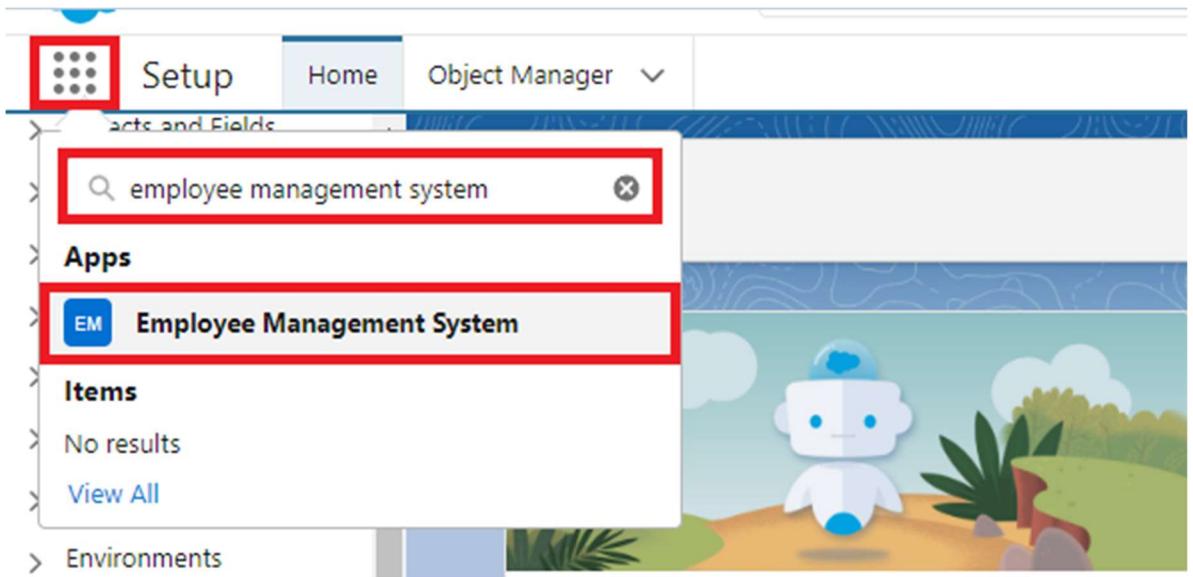
USER ADOPTION

Use Case:

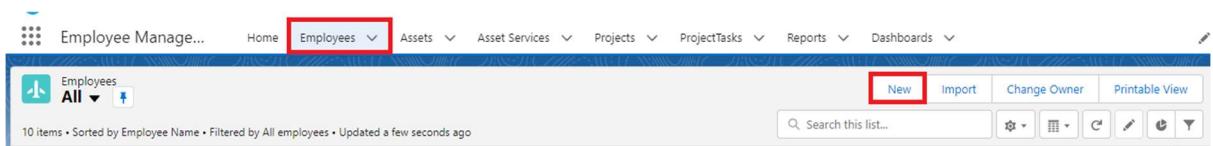
As a new Administrator, you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more. In this unit, you will learn about users and how you add users to your Salesforce org.

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

IMPORT DATA

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

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

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

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

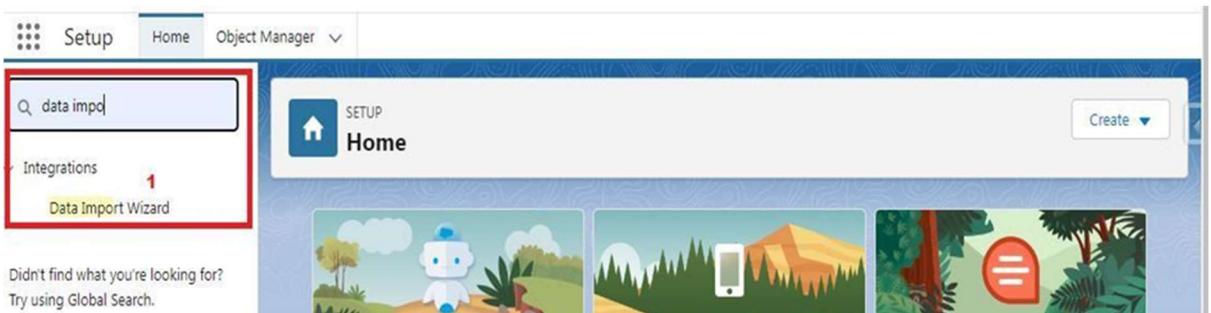
Use Case:

Congrats you have successfully made an app with all the default settings for the organization. Now here comes the real admin work, to import the old data of TheSmartBridge organization which was in CSV format into the salesforce org without failing any of the record.

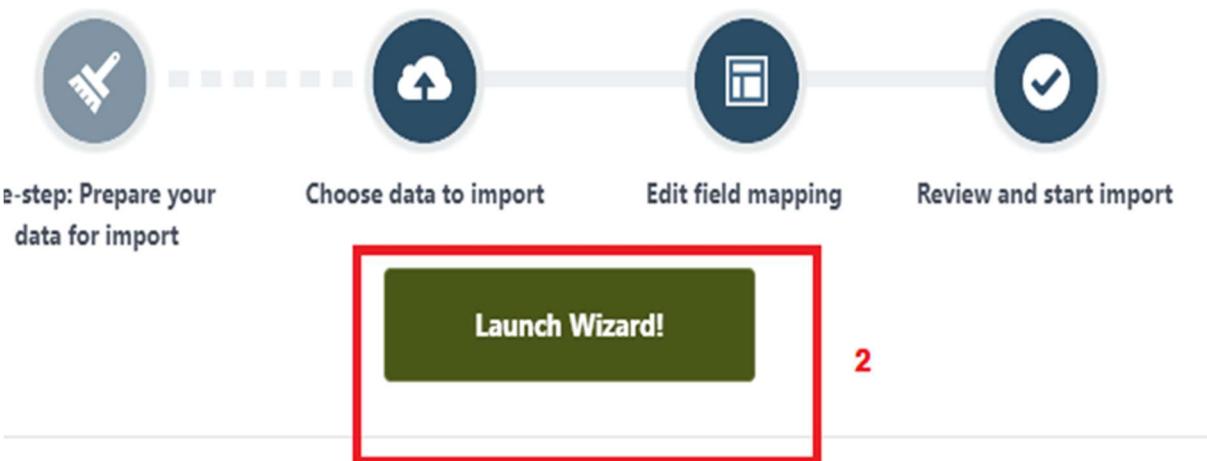
Note in real time you might also facing some additional task such as data cleaning, elimination of duplicate values or records, etc.

Import Data

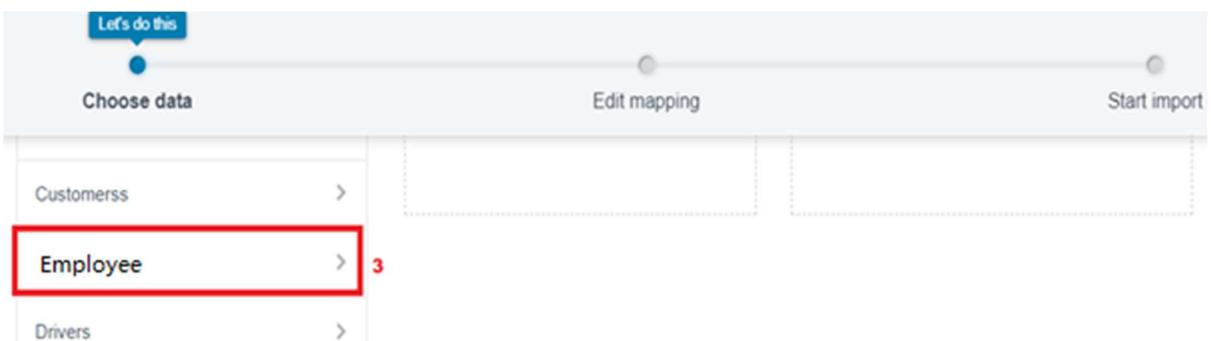
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



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.

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.

The screenshot shows the 'Edit Field Mapping' step of a data import process. A table lists field mappings between a CSV header and a Salesforce object. The table has columns: Edit, Mapped Salesforce Object, CSV Header, Example, Example, and Example. The 'Mapped Salesforce Object' column contains 'Employee Name', 'Date of Birth', 'Gender', 'Qualification', 'Address', 'Experience', and 'Phone no'. The 'CSV Header' column contains 'Employee Name', 'Date of Birth', 'Gender', 'Qualification', 'Address', 'Experience', and 'Phone no'. The 'Example' columns show specific values for each field. At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons, with 'Next' being highlighted.

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

The screenshot shows the 'Review & Start Import' step. It displays a summary of the import settings. On the left, 'Your selections:' list includes 'Employees ✓', 'Add new records ✓', and 'Employee - Data - Employee - Data.csv ✓'. In the center, 'Your import will include:' shows 'Mapped fields' with a count of '19'. On the right, 'Your import will not include:' shows 'Unmapped fields' with a count of '0'. At the top right, there is a 'Great job!' message and a 'Start import' button, which is highlighted.

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	State Message	Status
View Request	View Result	7515i00000JeYH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	105	60	0	14	0	0	Completed	

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

PROFILES

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- 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.

Use Case:

Great work Admin, you have done so good till now. TheSmartBridge CEO wants you to differentiate the users based on their functionalities, position and based on this those users need to have the minimum access to the database object in the organization. Now it's time to use your Admin skills to focus on the users, their functionality and position in the organization in order to achieve the CEO requirements.

HR Profile

To create a new profile:

1. Go to setup >>> type profiles in quick find box >>> click on profiles >>> clone the desired profile (Standard user) ? enter profile name (HR) >>> Save.
-

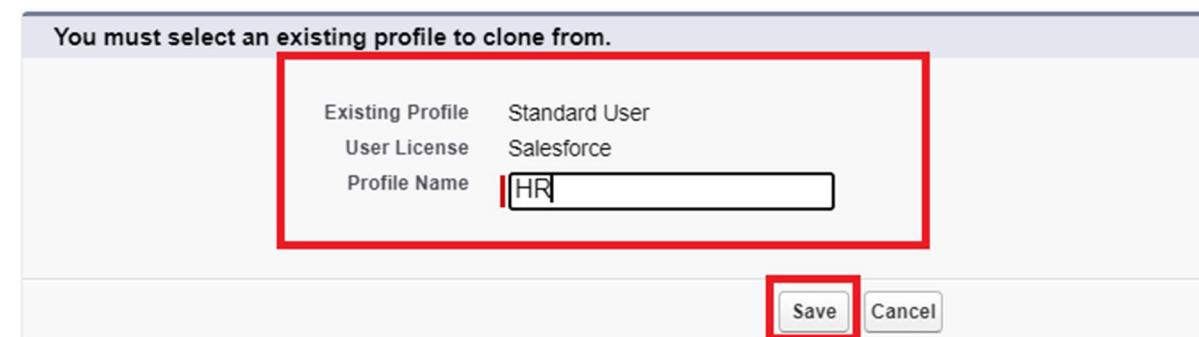
Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text" value="HR"/>

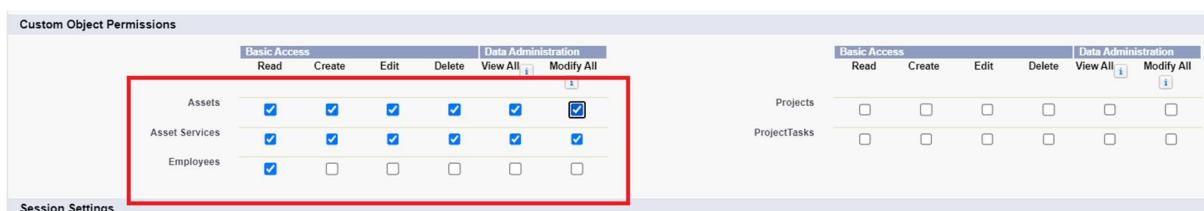
Save **Cancel**



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"/>

Session Settings



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

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.

Use Case:

You have successfully fulfilled the 1st requirement i.e., differentiating the users based on the functionality. Now comes the 2nd task of differentiating the users based on their position, using your excellent admin skills and expanding the custom roles for the organization and assigning it to the users.

Creating HR Role

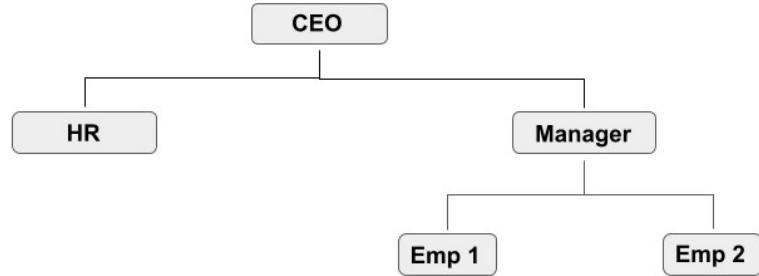
Creating HR Role:

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.

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:

- Username

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

Use Case:

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

Create User

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

7. Role : HR
8. User license : Salesforce
9. Profiles : HR

The screenshot shows the 'New User' setup page in Salesforce. The 'General Information' section on the left includes fields for First Name, Last Name, Alias, Email, Username, and Nickname. The 'Role' field is set to 'HR', 'User License' to 'Salesforce', and 'Profile' to 'HR'. The 'Save' button is highlighted with a red box.

1. Save.

Go To Setup

1. Go to setup >>> type users in quick find box >>> select users >>> click New user.
2. Fill in the fields
 - First Name: Kol
 - Last Name : Mikaelson
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.text
 - Nick Name : Give a Nickname

- Role : Manager
 - User license : Salesforce Platform
 - Profiles : Manager
3. Save.

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.

Use Case:

Hurray!! you have completed the data model structure for your organization but while looking at the detailed and edit pages it seems to be so clumsy, so decide to organize the page in a pleasant way for the sake of good and pleasant appearance and assembling all different kinds of information in different sections.

To Create A Page Layout

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

The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for Setup, Home, and Object Manager, with Object Manager selected. A search bar at the top right contains the text "Employee". Below the tabs, the title "Object Manager" is displayed under "SETUP". A table lists one item: "Employee" (Label), "Employee_c" (API Name), "Custom Object" (Type), and "31/05/2023" (Last Modified). The "Edit" button is highlighted with a red box.

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

The screenshot shows the "Page Layouts" section of the Employee object setup. The "Page Layouts" tab is selected. It displays one item: "Employee Layout" (Page Layout Name), created by "Nick" on "28/05/2023, 7:34 pm". A "New" button is highlighted with a red box.

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 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 as shown below.

The screenshot shows the Salesforce Page Layout Editor interface. At the top, there are standard toolbar buttons: Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a sidebar titled 'Fields' lists various options: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The main area displays a grid of fields. A red box highlights the 'Section' field in the 'Quick Find' search results. The fields include:

Field	Type	Value
Cab Allowance	Text	
Email	Text	
Food Allowance Am...	Text	
Last Modified By	Text	
Mode of Work	Text	
Reports to	Text	
Cab Allowance Amount	Text	
Employee ID	Text	
Food Allowances	Text	
LinkedIn Profile	Text	
Owner	Text	
Qualification	Text	
Phone no	Text	1-415-555-1212
Mode of Work	Text	
Login Time	Text	
Logout Time	Text	
Address	Text	
Created By	Text	
Employee Name	Text	
Gender	Text	
Date of Birth	Text	
Experience	Text	
Joining date	Text	
Experience	Text	
Joining date	Text	
Logout Time	Text	
Age	Text	
Date of Birth	Text	21/06/2023
Address	Text	Sample Text
Age	Text	50.12
Cab Allowance	Text	✓
Food Allowances	Text	✓
Cab Allowance Amount	Text	₹123.45
Food Allowance Amount	Text	₹123.45

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

Create Another Page Layout

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

CHATTER GROUP

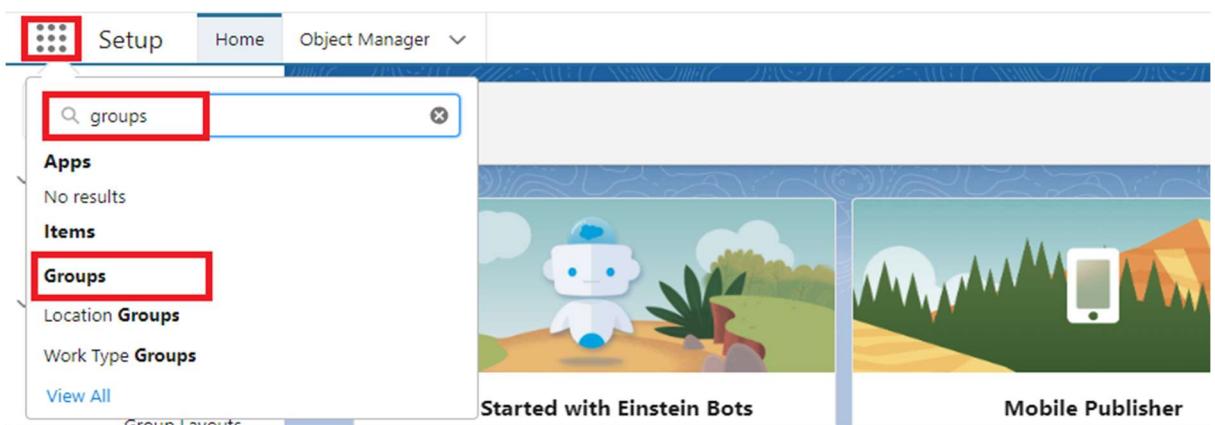
Salesforce Chatter Groups are collaborative spaces within the Salesforce platform that enable teams to communicate, share information, and collaborate on projects. They provide a centralized hub for discussions, file sharing, and updates, allowing users to stay connected, streamline workflows, and enhance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

Use Case:

Congratulations Admin you have made the job done for the organization, Amar The Founder of the organization and Jai Prakash The COO are very impressed with your work. But still there are some updates which your COO wants in your organization. So he comes to you with the idea that all the employees should have a common group for work discussion inside the salesforce. You know how to get this done with your admin skills.

Creating A Chatter Group For Your Organization.

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
• Group Name	Internal Discussion
• Description	Give a understanding Description on your own
• Access Type	Private
• Allow Customers	Checked

New Group

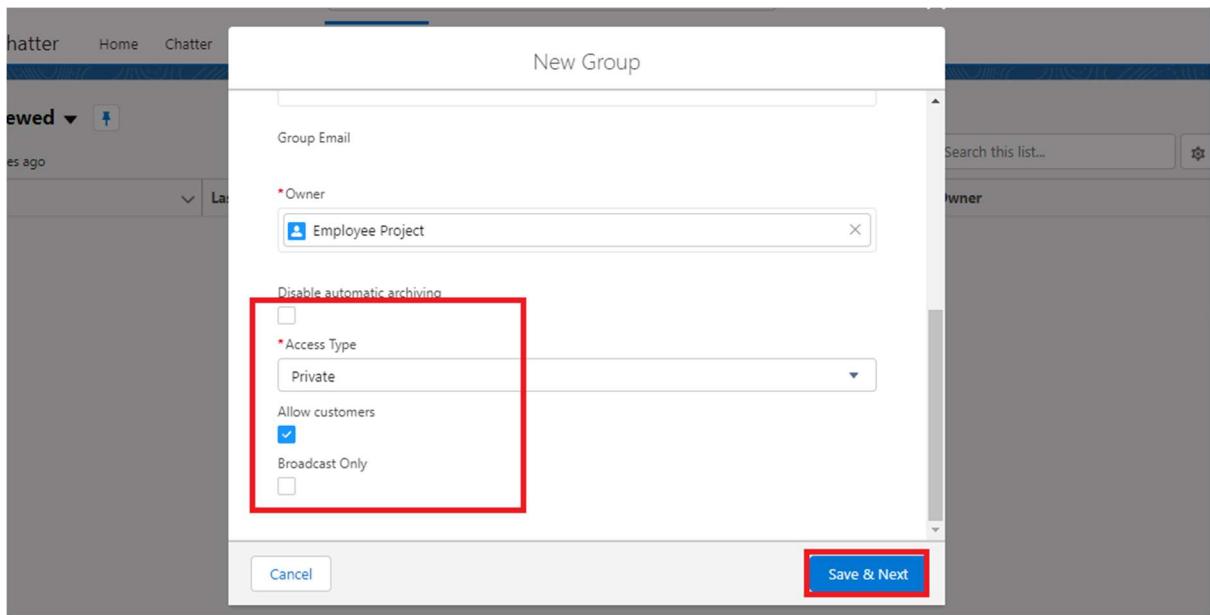
* Name
Internal Discussion

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 B I U

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

The screenshot shows the 'Manage Members' page in Salesforce. It lists four users under the heading 'Search People...': Jason Mikaelson, Elijah Mikaelson, Kol Mikaelson, and Niklaus Mikaelson. Each user entry includes a small profile icon, the user's name, and a status indicator ('Member') with a dropdown arrow. A red box highlights the entire list of users. In the bottom right corner of the main list area, there is a button labeled '+ Add' with a blue plus sign, which is also highlighted by a red box.

7. Click Done.

The screenshot shows the Salesforce Chatter interface for a group named 'Internal Discussion'. The top navigation bar includes links for Home, Chatter, People, Groups, and Files. The main feed area has a placeholder 'Share an update...' with a 'Share' button. On the left, there are engagement tabs for Post, Poll, and Question. On the right, the 'Group Details' sidebar provides information such as the group's owner (Limited), email (0F951000000UZGpCAO@post.5i-dwvawear.ap26.chatter.salesforce.com), and a 'Manage Members' section with a search bar.

8. This is how your group interface looks like.
9. Where it says Share an update, post this message to the group:
Welcome to the Internal Discussion Group, here you can post anything which is related to ongoing projects.
10. Click Share.

Note: You can like or comment on this post.

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

RECORD TYPES

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

Use Case:

All things done for the organization. But some of the organization employees feel it difficult to fill up all the details while creating an employee record, so Jai Prakash (COO) assigned you a task to create

different forms for employee records based on their mode of work. As an Admin, you know how to achieve this.

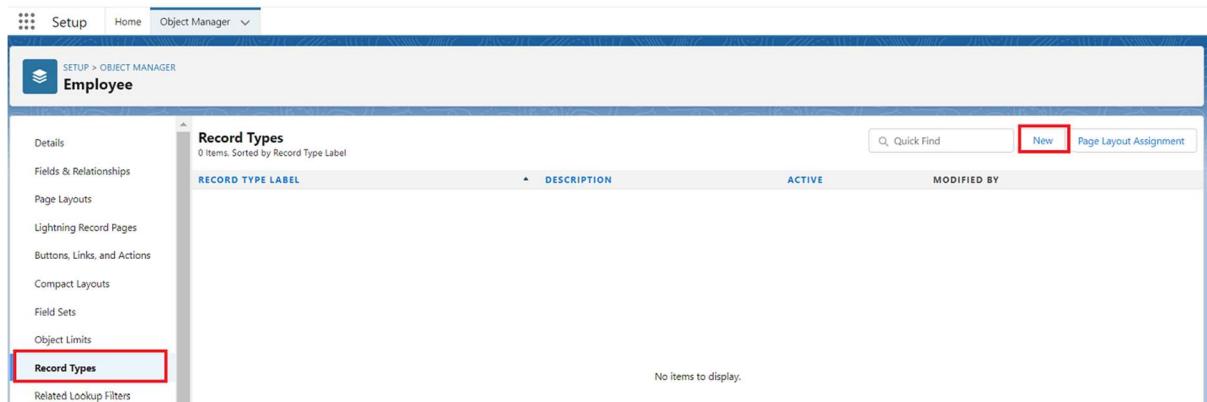
To Create A Record Type

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



The screenshot shows the Salesforce Object Manager interface. The top navigation bar has 'Setup' selected. The main search bar contains 'Employee'. The table below lists one item: 'Employee' (Label), 'Employee_c' (API Name), 'Custom Object' (Type). The 'Edit' button in the bottom right corner of the table row is highlighted with a red box.

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



The screenshot shows the Record Types page under the Employee object in the Object Manager. The left sidebar has 'Record Types' selected. The top navigation bar has 'New' highlighted with a red box. The table header includes columns for RECORD TYPE LABEL, DESCRIPTION, ACTIVE, and MODIFIED BY. A message at the bottom states 'No items to display.'

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

Step 1. Enter the details

Step 1 of 2

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

Record Type

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

 = Required Information

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

Employee Record Type: On Site Employee
Record Type Name: On_Site_Employee
Description:

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

Apply one layout to all profiles Apply a different layout for each profile

Profile:	Page Layout
Analytics Cloud Integration User	Employee Layout
Analytics Cloud Security User	Employee Layout
Custom: Sales Profile	Employee Layout
Custom: Support Profile	Employee Layout
Force.com - App Subscription User	Employee Layout
Force.com - Free User	Employee Layout
Gold Partner User	Employee Layout
HR	Employee Layout
Identity User	Employee Layout
Manager	On Site Employee layout
Marketing User	Employee Layout
Minimum Access - Salesforce	Employee Layout
On Site Employee	Employee Layout
Partner App Subscription User	Employee Layout
Partner Community Login User	Employee Layout
Partner Community User	Employee Layout
Read Only	Employee Layout
Remote Employee	Employee Layout
Salesforce API Only System Integrations	Employee Layout
Silver Partner User	Employee Layout
Solution Manager	Employee Layout
Standard Platform User	Employee Layout
Standard User	Employee Layout
System Administrator	On Site Employee layout
Work.com Only User	Employee Layout

Previous Save & New **Save** Cancel

7. click Save.

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.

Use Case:

Every day is a war for Admin with some unique challenges. A new challenge awaits as you enter the office. After you arrive in office you came to know that the manager is on leave and there's a lot work pending at his desk generally there are numbers of employee records that the manager have to enter in the salesforce org and no other person have the permission to create those records except him and your CEO wants it to be done by the end of the day, as it's not possible to create the same profile and assigned it to some other person in the org. So using your admin knowledge you came up with the idea to create a permission set and assign it to someone who doesn't have the access to do that job.

Let's create a permission set.

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
5. Use Case:

The CEO of an organization wants to have a brief data on employees working, projects in take, project progress, Assets assigned, what are the conditions of the Assets assigned. So he can have a clear picture of his organization and be able to make any decisions required based on this data. So he calls you on this task and wants you to represent the data in an appropriate way.

Let's create a Report.

Create Report

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

The screenshot shows a software application window titled "Employee Manage...". At the top, there is a navigation bar with links: 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..." and a toolbar with various icons. The main content area is titled "Reports" and "Recent" with a count of "2 items". On the left, there is a sidebar with categories: REPORTS (Recent, Created by Me, Private Reports, Public Reports, All Reports) and FOLDERS. The main table displays two report entries:

Report Name	Description	Folder	Created By	Created On	Subscribed
Employee's working on projects report		Private Reports	Employee Project	5/6/2023, 9:33 am	
Assets assigned to Employees		Private Reports	Employee Project	5/6/2023, 9:36 am	

In the top right corner of the main content area, there is another search bar labeled "Search recent reports...", a "New Report" button (which is also highlighted with a red box), and a "New Folder" button.

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' screen. On the left, there's a sidebar with categories like 'Category', 'Recently Used', and 'All'. Under 'All', various report types are listed: Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets. In the center, a search bar contains the text 'employee'. Below it is a table titled 'Select a Report Type' with columns 'Report Type Name' and 'Category'. The table lists several options: Activities with Employees (Standard), Employees (Standard), Employees with Reports to (Standard), Employees with ProjectTasks and Projects (Standard), Employee History (Standard), Assets with Employee Name (Standard), and Projects with ProjectTasks and Employees (Standard). A red box highlights the search bar and the table area. To the right, a 'Details' panel for 'Employees' is shown, featuring a 'Start Report' button (which is also highlighted with a red box), 'Details' section, 'Created By You' section, 'Created By Others' section, and 'Objects Used in Report Type' section.

4. Customize your report

- Add fields from left pane as shown below

The screenshot shows the 'New Employees Report' configuration screen. At the top, there's a navigation bar with 'Employee Manage...', 'Home', 'Employees', 'Assets', 'Asset Services', 'Projects', 'ProjectTasks', 'Reports', and 'Dashboards'. Below that is a toolbar with 'Save & Run', 'Save', 'Close', and 'Run' buttons. The main area is divided into two panes: 'Fields' on the left and a preview table on the right. The 'Fields' pane has sections for 'Outline' (highlighted with a red box) and 'Filters'. It includes a 'Groups' section with 'GROUP ROWS' and an 'Add group...' button. The 'Columns' section (also highlighted with a red box) has an 'Add column...' button and a list of fields: Employee: Employee Name, Employee ID, Reports to, Login Time, Logout Time, Mode of Work, LinkedIn Profile. The preview table shows two rows of data:

	Employee: Employee Name	Employee ID	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
1	Employee	a054000004WtP	-	-	-	-	http://(https://)linkedIn
2	temp for Junction test	a054000004WvN	-	8:00 am	5:00 pm	-	https://linkedIn

5. Save or run it.

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

DASHBOARDS

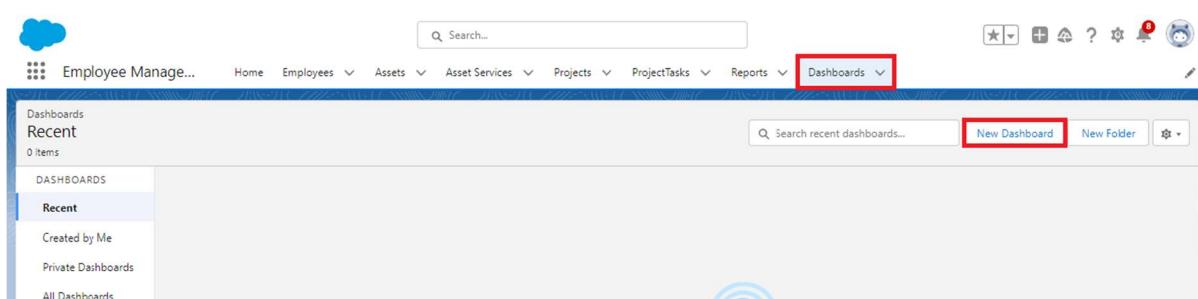
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

Use Case:

As an Admin for the organization you keep pushing yourself to reach out the business requirements to take the organization to peak heights and all your superiors are very much impressed with your efforts and work dedication. In addition with reports you make an ease for the CEO in viewing the reports with data visualization. So he doesn't have to search for the data he wants during the meetings.

Create Dashboard

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



2. Give a Name and click on Create.

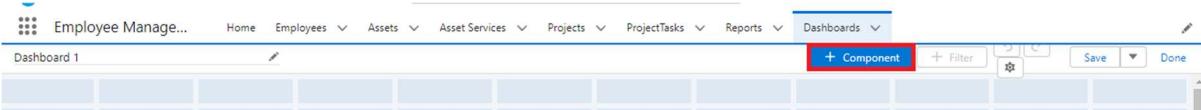
New Dashboard

* Name
Dashboard 1

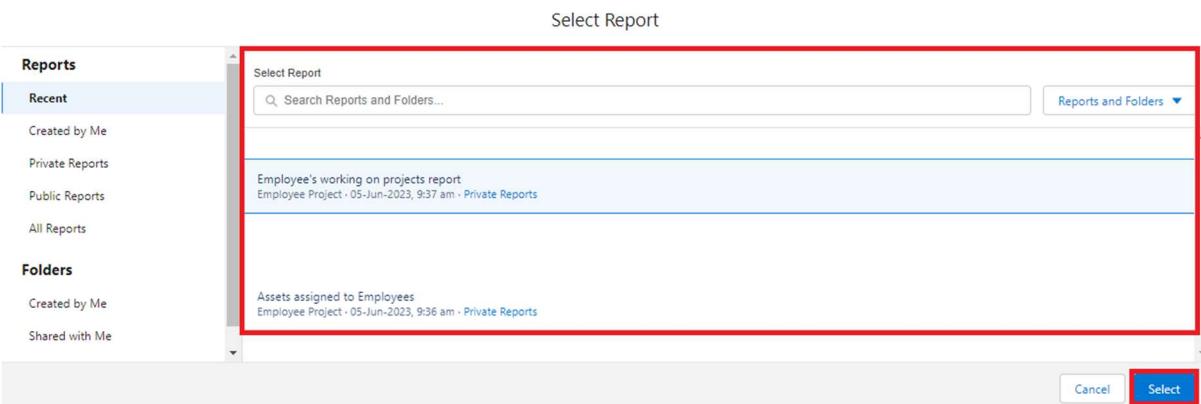
Description

Folder
Private Dashboards

3. Select add component.



4. Select a Report and click on select.



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

APPROVAL PROCESS

Use Case:

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

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

Prerequisites:

Create the **leave** object with the following fields.

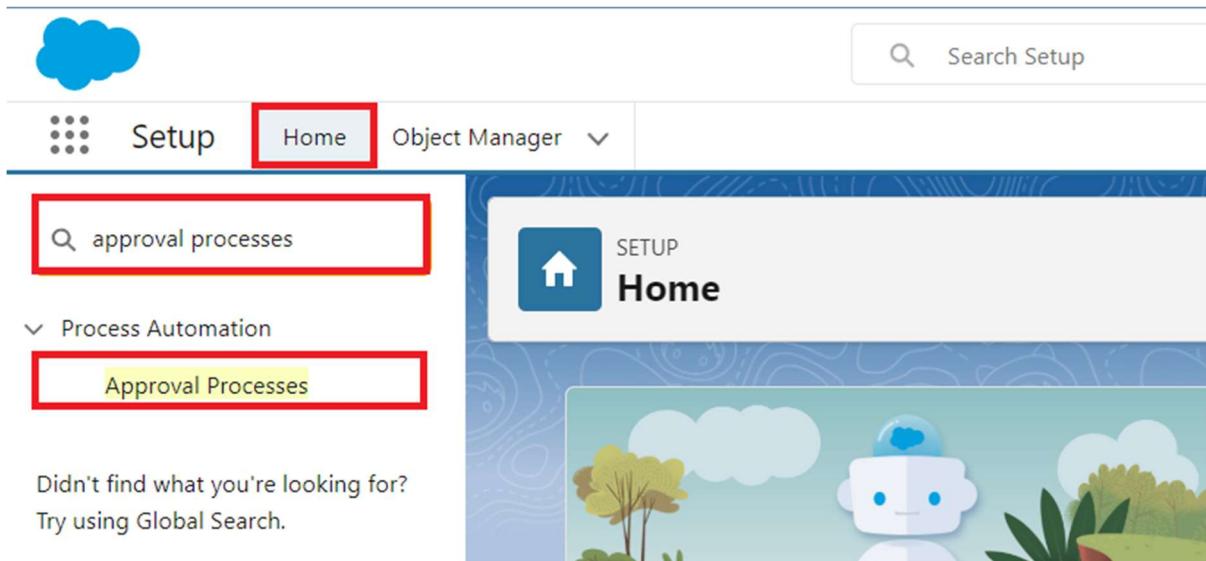
Object	Fields	Datatype
Leave	Employee Name No. of Days Subject	Lookup with Employee object Number Text Text Area(Rich) Picklist: values as follows

Description		Submitted
Status		Approved
		Rejected
Note: Make sure the Status field is read only for everyone. (Give read only permission in step 3 while creating the field)		

Create the tab for the **leave** object.

Create An Approval Process For Leave Object

1. Go to 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.

A listing of both active and inactive approval processes for **Leaves** is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to or, select Use Standard Wizard to configure all approval options.

Create New Approval Process ▾

- Use Jump Start Wizard
- Use Standard Setup Wizard

4. Enter the following parameters

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

Select Approver	select Automatically assign to approver(s) and for users select the name of the user with the Manager role.
-----------------	---

Add a screenshot here

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

Approval Process

Use Case:

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

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

Prerequisites:

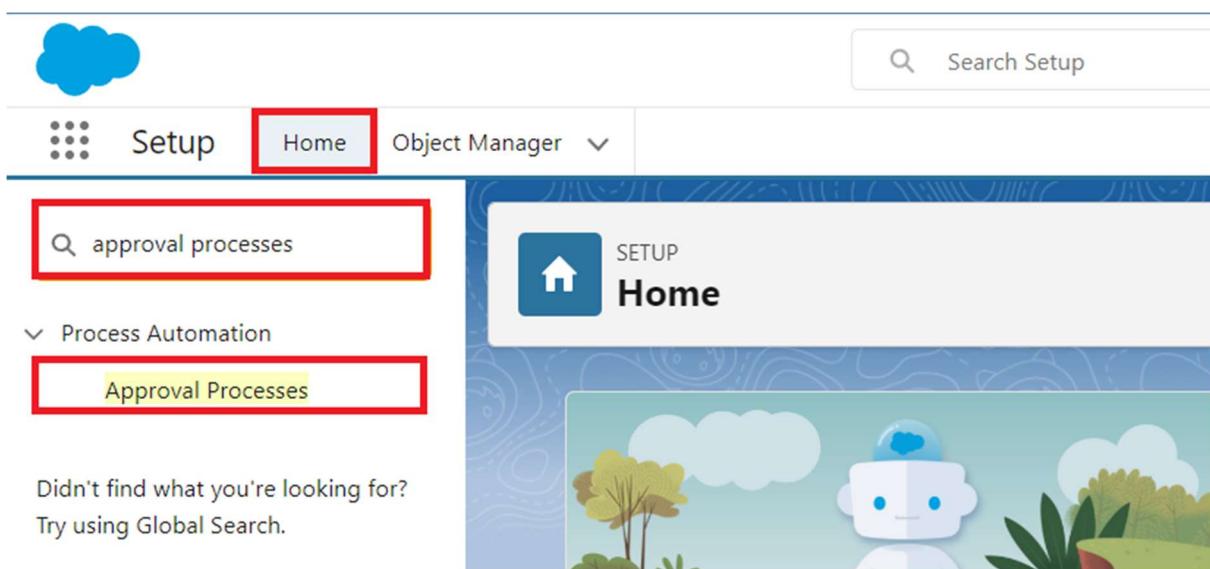
Create the **leave** object with the following fields.

Object	Fields	Datatype
Leave	Employee Name No. of Days Subject Description Status	Lookup with Employee object Number Text Text Area(Rich) Picklist: values as follows <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Submitted Approved Rejected </div> Note: Make sure the Status field is read only for everyone. (Give read only permission in step 3 while creating the field)

Create the tab for the **leave** object.

Create An Approval Process For Leave Object

Go to 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.

Manage Approval Processes For: **Leave**

A listing of both active and inactive approval processes for Leaves is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to configure all approval options.

Create New Approval Process ▾

- Use Jump Start Wizard**
- Use Standard Setup Wizard

4. Enter the following parameters

Parameter	Value
Name	Leave Approval Request
Unique Name	Leave_Approval_Request(This automatically gets sent when you tab out of the Name field)
Approval Assignment	Leave blank
Email Template	

Add the Submit for Approval button and Approval History related list to all Travel Approval page layouts	Leave this selected/checked
Use Approver Field of Leave Owner	Leave unselected/unchecked.
Select Approver	select Automatically assign to approver(s) and for users select the name of the user with the Manager role.

Add a screenshot here

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

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.

Enter Name and Description

Approval Process Name	hahaha
Name	<input type="text" value="Approval from HR"/>
Unique Name	<input type="text" value="Approval_from_HR"/> i
Description	<input type="text"/>

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

Field	Operator	Value	
Leave: No. of Days	equals	5	AND
--None--	--None--		

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.

User
Niklaus Mikaelson

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.

Final Rejection Action

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

Action	Type	Description
Edit	Record Lock	Unlocked

- 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.

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, an Fields are shown only for the type that you select.

Name	Unique Name	Description
Approval Status to Rejected	Approval_Status_to_Reject	

Object: Leave
Field to Update: Status
Field Data Type: Picklist
Re-evaluate Workflow Rules after Field Change

Specify New Field Value

Picklist Options

The value above the current one
 The value below the current one
 A specific value: Rejected

Save Save & New Cancel

APEX TRIGGER

Use Case:

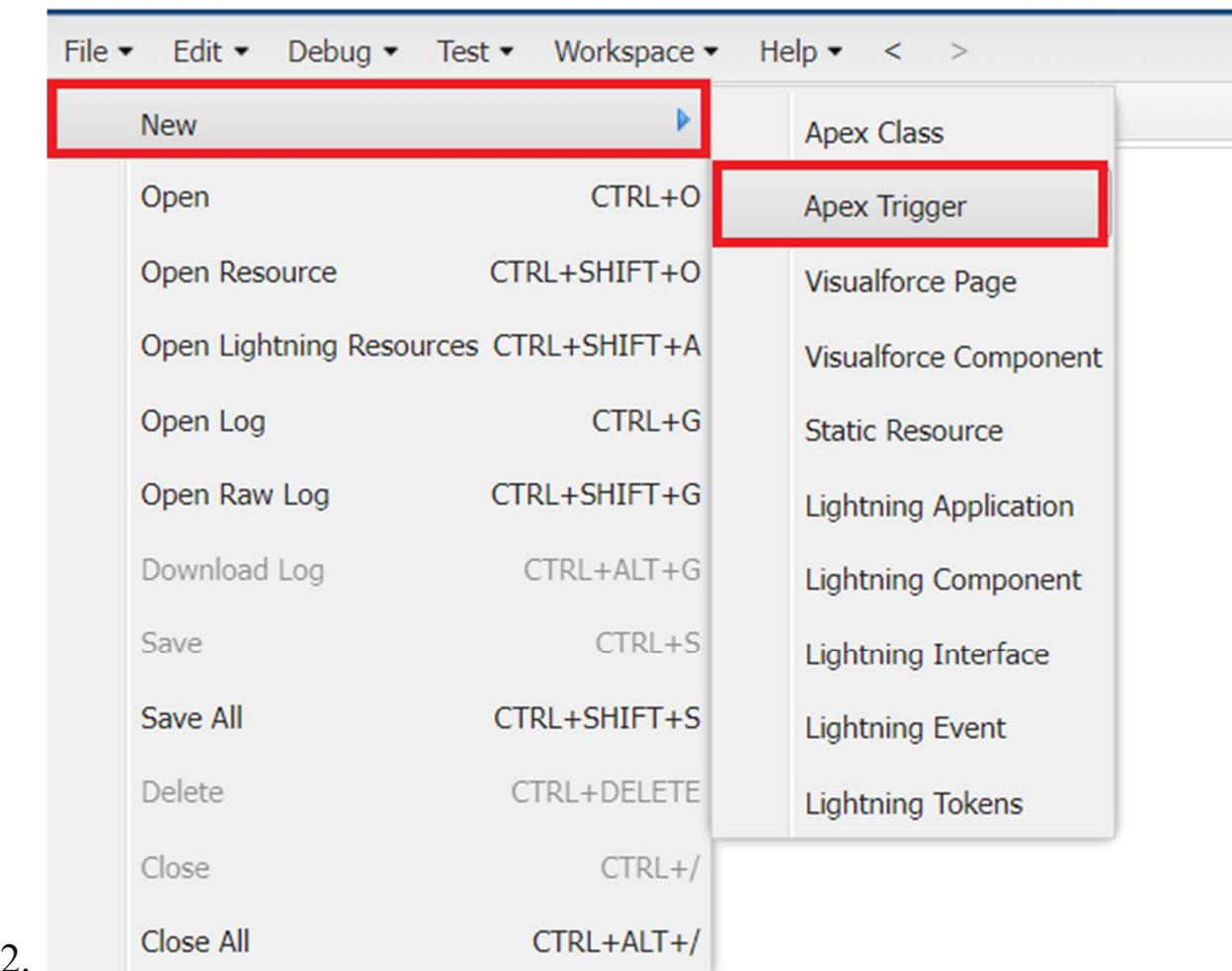
The Manager at TheSmartBridge wants no duplicate names of employees should enter into the database. So he/she recalls you for the solution.

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

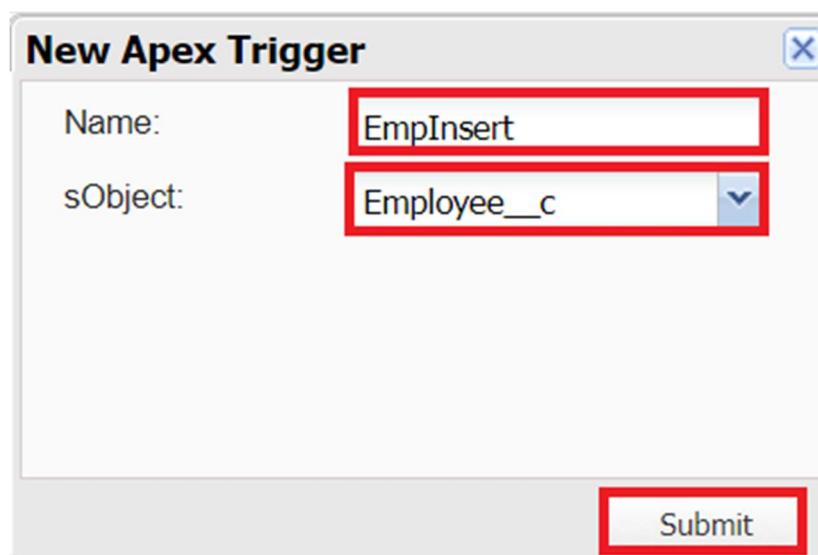
Create An Apex Trigger

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

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

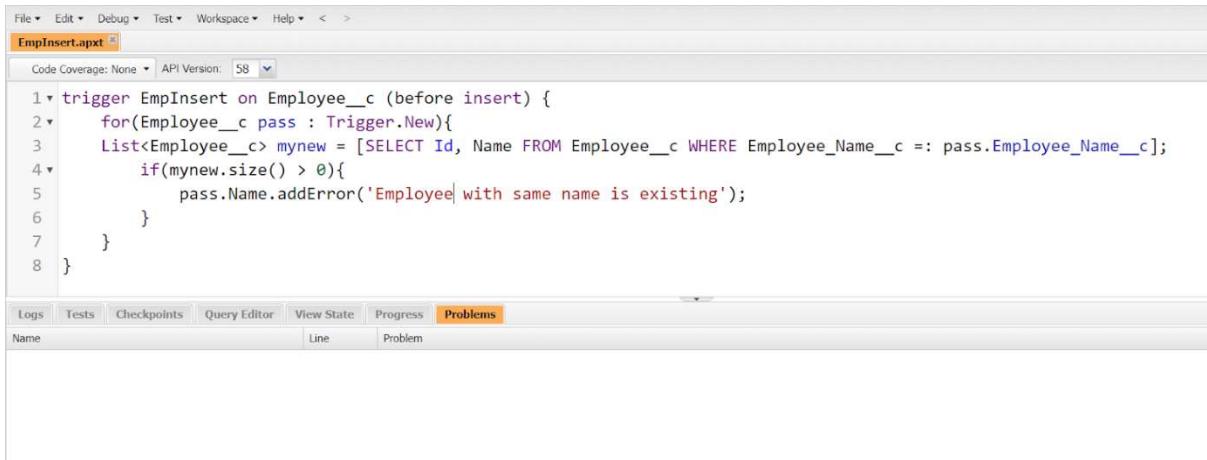


2. Give the Apex Trigger name as “PhnValidTrigger”, and select “Passenger__c” from the dropdown for sObject.



3. Click Submit.

4. Now write the code logic here



The screenshot shows the Workbench IDE interface with the 'EmpInsert.apxt' file open. The code editor contains the following Apex trigger:

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

The 'Problems' tab is selected at the bottom of the interface.

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

Trigger Code:

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

Testing The Trigger

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

New Employee: On Site Employee

Information

Employee ID	Owner
Employee Name	demo project
Jackie Chan	
Gender	Reports to
--None--	Search Employees... <input type="button" value="🔍"/>
Experience	Qualification
Email	Phone no
Joining date	Mode of Work
	None--
LinkedIn Profile	In Time
Out Time	
Leave Days	

Ø We hit a snag.

Review the errors on this page.

- Employee with same name is existing

Review the following fields

- Employee ID