Project Documentation and Report:

LONG TERM INTERNSHIP ON SALES FORCE

Project Title: streamlined employee detail management

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**Streamlined Employee Detail Management**

**Hardware Required:**

laptops

**System Required:**

Windows 8 machine Install with two web browser Bandwidth of

30mbps

Streamlined Employee Detail Management using CRM is a

comprehensive and efficient system designed to effectively

manage and organize employee information within an

organization. This system leverages Customer Relationship

Management (CRM) principles and tools to centralize and

streamline employee data, providing a robust platform for HR

professionals and managers to handle various aspects of

employee details.

**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

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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

**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 :

3.

First name & Last name

4.

Email

5.

Role : Developer

6.

Company : College Name

7.

County : India

8.

Postal Code : pin code

9.

username : should be a combination of your name and

company

10. This need not be an actual email id, you can give anything

in the format : username@organization.com

11.

Click on sign me up after filling these.3

**Activity 2: Account Activation:**

1. Go to the inbox of the email that you used while signing

up. Click on the verify account to activate your account.

The email may take 5-10mins.

2.

Click on Verify Account

3.

Give a password and answer a security question and click

on change password.Then you will redirect to your salesforce setup page.

**Object**

4**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.

**To Create An Object**

5Click on gear icon >>> click setup.

1. From the setup page ? Click on Object Manager ? Click on

Create ? Click on Custom Object.

2. On Custom object defining page:

3. Enter the label name, plural label name, click on Allow

reports, Allow search.

4. Click on Save.

**Create Employee Object**

To create an object:

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

on Create >>> Click on Custom Object.

2. Enter the label name "Employee"

3. Plural label name "Employees"

4. Enter Record Name Label and Format

• Record Name : Employee Name

6• Data Type : Text

5. Click on Allow reports and Track Field History and Allow

Activities.

6. Allow search >>> Save.

**Create Organization Object**

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

on Create >>> Click on Custom Object.

2. Enter the label name "Organization"

3. Plural label name "Organizations"

4. Enter Record Name Label and Format

• Record Name : Organization

• Data Type : Text

5. Click on Allow reports and Track Field History and Allow

Activities.

6. Allow search >>> Save.

**Create Health Insurance Object**

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

on Create >>> Click on Custom Object.

2. Enter the label name >>> Health Insurance

4. Plural label name >>> Health Insurances

3. Enter Record Name Label and Format

• Record Name: Insurance Company Id

• Data Type: Auto Number

• Display Format : -{000}

• Starting number: 1

4. Click on Allow reports and Track Field History and Allow

Activities.

5. Allow search >>> Save.

**Create Leave Object**

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

on Create >>> Click on Custom Object.

2.Enter the label name: Leave

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3. Plural label name: Leaves

4. Data Type : Auto Number

Display Format : -{000}

Starting number : 1

5. Click on Allow reports and Track Field History and Allow

Activities.

6. 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.

**Create Custom Tabs**

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) uncheck the include tab .

3. Make sure that the Append tab to users' existing personal

customizations is checked

4. Click Save.

**Creating Remaining Tabs**

1. Now create the Tabs for the remaining Objects, they are “

Employee, Organization, Health Insurances, Leave”.

92. Follow the same steps as mentioned above .

**The Lightning App**

An app is a collection of items that work together to serve a

particular function. In Lightning Experience, Lightning apps

give your users access to sets of objects, tabs, and other items

all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color

and logo. You can even include a utility bar and Lightning page

tabs in your Lightning app. Members of your org can work

more efficiently by easily switching between apps.

**Create A Lightning App**

1. Go to setup page ? search “app manager” in quick find ?

select “app manager” ? click on New lightning App.

10**2. Fill the app name in app details as Employee Mapp >>>**

**Next >>> (App option page) keep it as default >>> Next >>>**

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

**3. To Add Navigation Items: Select the items (Employee,**

**Organization, Health Insurances, Leave ) from the search bar**

**and move it using the arrow button >>> Next.**

To

Add User Profiles:

11**4. 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 also 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

12**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.**

**Creating Junction Object**

1314

**A Junction object is a custom object that serves as a bridge**

**between two related objects in a many-to-many**

**relationship. It allows you to create a relationship between**

**records of two different objects by creating a many-to-many**

**relationship model.**

**Creating junction object as Employee details with**

**Organization & Health Insurance**

**To create junction object**

**Creating A Master-Detail Relationship**

Master-detail relationship is a type of relationship between two

objects where the master object controls certain behaviors and

settings of the detail object. Here are a few use cases that

demonstrate the use of master-detail relationships

1. Go to the setup page >>> click on object manager >>> From

drop down click edit for Employee object.

2. Click on fields & relationship >>> click on New.3. Select “Master-Detail relationship” as data type and click Next.

4. Select the related object “ Organization ” and click next.

5. Next ? Next ? Save & New.

**Creating Lookup Relationship**

15**A Lookup relationship is a type of relationship in Salesforce**

**that connects two objects together based on a field known**

**as the Lookup field. It establishes a relationship between a**

**child object and a parent object, allowing the child object to**

**reference the parent object.**

**1. Go to the setup page >>> click on object manager >>> Click**

**the Employee object.**

**2. Click on fields & relationship >>> click on New.**

**3. Click Lookup Relationship then next.**

16**4. Related to Health Insurance.**

**5. Give Field Label as “Health Insurance Name” and click**

**Next.**

**Next >>> Next >>> Save.**

6. Go to the setup page >>> click on object manager >>> Click

the “Leave” object.

7. Click on fields & relationship >>> click on New.

8. Click Lookup Relationship then next.

9. Related to Employee.

10. Related to Leaves.

11. Give Field Label as “Health Insurance Name” and click Next.

12. Next >>> Next >>> Save.

1718

**Creating Text Field**

**Employee**

To create fields in an object: Go to setup >>> click on Object

Manager >>> type object name( Employee ) in quick find bar >>>

click on the

object.

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

3. Select Data type as “Text”.

4. Click on Next

5. Fill the above as following:

•

**Field Label: Name**

•

**Length : 80**

•

**Field Name : gets auto generated**

Click on Next >>> Next >>> Save and new.19

•

*Organization*

1. Go to setup >>> click on Object Manager >>> type object

name( Organization ) in quick find bar >>> click on the

object.

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

3. Select Data type as “Text”.

4. Click on Next

5. Fill the above as following:20

•

**Field Label: Company Name**

•

**Length : 80**

•

**Field Name : gets auto generated**

•

**Click on Next >>> Next >>> Save and new.**

**Health Insurance**

1. Go to setup >>> click on Object Manager >>> type object

name( Health Insurance ) in quick find bar >>> click on the

object.

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

3. Select Data type as “Text”.

4. Click on Next

5.

**Fill the above as following:**

• Field Label: Name

• Length : 20

• Field Name : gets auto generated

• Click on Next >>> Next >>> Save and new.**Creating The Phone Field**

Employee

To create fields in an object:

1. Go to setup >>> click on Object Manager >>> type object

name(Employee ) in quick find bar >>> click on the object.

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

3. Select Data type as “Phone” and click Next.

4. Given the Field Label as “ Phone Number”.

5. Field Name will be auto populated, and click on Next >>>

Next >>> Save & new.

Organization

To create fields in an object:

211. Go to setup >>> click on Object Manager >>> type object

name( Organization ) in quick find bar >>> click on the object.

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

3. Select Data type as “Phone” and click Next.

4. Given the Field Label as “ Phone Number”.

5. Field Name will be auto populated, and click on Next >>> Next >>>

Save & new.

**Creating Email Field**

Employee

To create fields in an object:

1. Go to setup >>> click on Object Manager >>> type object

name( Employee ) in quick find bar >>> click on the object.

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

3. Select Data type as “Email” and click Next.

4. Given the Field Label as “ Email Id”.

5. Field Name will be auto populated, and click on Next >>>

Next >>> Save.

22**Organization**

To create fields in an object:

1. Go to setup >>> click on Object Manager >>> type object

name( Organization ) in quick find bar >>> click on the object.

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

3. Select Data type as “Email” and click Next.

4. Given the Field Label as “ Email Id”.

5. Field Name will be auto populated, and click on Next >>>

Next >>> Save.

**Creating Picklist Field**

23Employee

To create fields in an object:

1. Go to setup >>> click on Object Manager >>> type object

name( Employee ) in quick find bar >>> click on the object.

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

3. Select Data type as “Picklist” and click Next.

4. Enter Field Label as “Designation”, under values select “Enter

values, with each value separated by a new line" and enter

values as shown below.

• Marketing Manager

• Marketing Director

• Graphic Designer

• Receptionist

• Manager

• Clerk

• CEO—Chief Executive Officer

• COO—Chief Operating Officer

• CFO—Chief Financial Officer

• Software Engineer

• Data Entry

5. Click Next >>> Next >>> Next >>> Save & New.

6. Select Data type as “Picklist” and click Next.

7. Enter Field Label as “Gender”, under values select “Enter

values, with each value separated by a new line" and enter

values as shown below.

248. Click Next >>> Next >>> Next >>> Save & New.

9. Select Data type as “Picklist” and click Next.

10. Enter Field Label as “Shift Timings”, under values select

“Enter values, with each value separated by a new line" and

enter values as shown below.

• 10:00am to 5:00pm

• 6:00pm to 12:00pm

• 7:00pm to 2:00am

11. Click Next? Next ? Next ? Save .

25Leave

To create fields in an object:

1. Go to setup >>> click on Object Manager >>> type object

name( Leave ) in quick find bar >>> click on the object.

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

3. Select Data type as “Picklist” and click Next.

4. Enter Field Label as “Leave Type”, under values select “Enter

values, with each value separated by a new line" and enter

values as shown below.

• Bereavement leave

• Medical Leave

• Paid Leave

• Maternity Leave

• Half Day Leave

• One Day Leave

• Casual Leave

• Emergency Leave

5. Click Next >>> Next >>> Next >>> Save & New.

6. Select Data type as “Picklist” and click Next.

7. Enter Field Label as “Leave Status”, under values select “Enter

values, with each value separated by a new line" and enter

values as shown below.

• Not on leave

• On Leave

268. Click Next? Next ? Next ? Save .

**Creating Currency Field**

Employee

To create fields in an object:

1. Go to setup >>> click on Object Manager >>> type object

name( Employee ) in quick find bar >>> click on the object.

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

3. Select Data type as “Currency” and click Next.

4. Enter Field Label as “Salary ” and length as “ 18 ” and decimal

0.Field name will be auto generated.

5. Click Next >>> Next >>> Next >>> Save .

27**Creating Date Field**

Employee

To create fields in an object:

1. Go to setup >>> click on Object Manager >>> type object

name( Employee ) in quick find bar>>> click on the object.

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

3. Select Data type as “Date ” and click Next.

4. Enter Field Label as “ Date of birth ” .Field name will be auto

generated.

5. Click Next >>> Next >>> Next >>> Save .

28Leave

To create fields in an object:

1. Go to setup >>> click on Object Manager >>> type object

name( Leave ) in quick find bar >>> click on the object.

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

3. Select Data type as “Date ” and click Next.

4. Enter Field Label as “ Start Date”. Field name will be auto

generated.

5. Click Next >>> Next >>> Next >>> Save & New .

6. Select Data type as “Date ” and click Next.

7. Enter Field Label as “ End Date”. Field name will be auto

generated.

298. Click Next >>> Next >>> Next >>> Save .

**Creating URL Field**

Organization

To create fields in an object:

1. Go to setup >>> click on Object Manager >>> type object

name( Organization ) in quick find bar >>> click on the object.

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

3. Select Data type as “ URL ” and click Next.

4. Enter Field Label as “ Website ” .Field name will be auto

generated.

5. Click Next >>> Next >>> Next >>> Save .

30**Creating Checkbox Field**

Employee

To create fields in an object:

1. Go to setup >>> click on Object Manager >>> type object

name( Employee ) in quick find bar >>> click on the object.

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

3. Select Data type as “Checkbox ” and click Next.

4. Enter Field Label as “ Health Issues If Any” . Field name will be

auto generated.

5. Click Next >>> Next >>> Next >>> Save & New .

316. Select Data type as “Checkbox ” and click Next.

7. Enter Field Label as “Existing Health Insurance” . Field name

will be auto generated.

8. Click Next >>> Next >>> Next >>> Save & New .

9. Select Data type as “Checkbox ” and click Next.

10. Enter Field Label as “Travel Allowance” . Field name will be

auto generated.

11. Click Next >>> Next >>> Next >>> Save & New.

32**Creating Geolocation Field**

Employee

To create fields in an object:

1.Go to setup >>> click on Object Manager >>> type object

name( Employee ) in quick find bar >>> click on the object.

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

3. Select Data type as “Geolocation ” and click Next.

4. Enter Field Label as “ Employee Location” . Field name will be

auto generated.

5. Check the decimal checkbox, In the decimal place enter 15.

6. Click Next >>> Next >>> Next >>> Save .

33Organization

To create fields in an object:

1.Go to setup >>> click on Object Manager >>> type object

name( Organization ) in quick find bar >>> click on the object.

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

3. Select Data type as “Geolocation ” and click Next.

4. Enter Field Label as “ Organization Location” . Field name will

be auto generated.

5. Check the decimal checkbox, In the decimal place enter 15.

6. Click Next >>> Next >>> Next >>> Save .

34**Creating Formula Field**

Employee

To create fields in an object:

1.Go to setup >>> click on Object Manager >>> type object

name( Employee ) in quick find bar >>> click on the object.

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

353. Select Data type as “Formula ” and click Next.

4. Select “Number” as Formula Return type. Enter “Age” as Field

label. Field name will be auto generated.

5. Click Next, In the Advanced Formula space enter the

formula.

(TODAY() - Date\_of\_birth\_\_c ) / 365, Check the syntax.

6. Click Next >>> Next >>> Next >>> Save & New .

367. Select Data type as “Formula ” and click Next.

8. Select “Number” as Formula Return type. Enter “Distance” as

Field label. Field name will be auto generated.

9. Click Next, In the Advanced Formula space enter the

formula.

DISTANCE( Organization\_\_r.Organization\_Location\_\_c

, Employee\_Location\_\_c , 'km'), Check the syntax.

10. Click Next >>> Next >>> Next >>> Save .

Leave

To create fields in an object:

1.Go to setup >>> click on Object Manager >>> type object

name( Leave ) in quick find bar >>> click on the object.

372. Now click on “Fields & Relationships” >>> New.

3. Select Data type as “Formula ” and click Next.

4. Select “Number” as Formula Return type. Enter “Duration” as

Field label. Field name will be auto generated.

5. Click Next, In the Advanced Formula space enter the

formula.

start\_date\_\_c - End\_date\_\_c , Check the syntax.

6. Click Next >>> Next >>> Next >>> Save .

**Creating Validation Rule**

Employee

To create fields in an object:

1.Go to setup >>> click on Object Manager >>> type object

name( Employee ) in quick find bar >>> click on the object.

2. Now click on “Validation Rules” >>> New.

3. Rule Name is “TravelAllowanceOnlyForGreaterDistance”

4. Click the active checkbox.

5. Insert Field , Insert the formula as

IF( Distance\_\_c <15, Travel\_Allowance\_\_c ==true,

Travel\_Allowance\_\_c ==false),

Check the syntax.

6. In the Error message box,

Distance is greater than 15 you should select travel allowance

required.

7. Error location should be displayed on field. Field should be

“Travel Allowance”.

8. Click save.

3839**Email Templates**

We use email templates to increase productivity and ensure

consistent messaging. Email templates with merge fields let

you quickly send emails that include field data from Salesforce

records like contacts, leads, or opportunities. You can use email

templates when emailing groups of people—with list email or

mass email—or just one person.

Salesforce email templates are the easiest way to get your

emails done. They help you create and send quick emails that

include merge fields from Salesforce records like Contacts,

Leads, Opportunities, or Custom Objects.

When you have a large number of contacts or leads in

Salesforce, it can be difficult to keep track of who needs to be

notified about new information. Salesforce email templates

allow you to combine all these contacts or leads into one email

and then send it out simultaneously.

**Create Email Template For Emergency Leave Approval**

40**To create Email Template:**

**1. Go to App launcher ? click on Email Template.**

**2. Click on “Email Templates” ? New Email Template.**

**3. Email Template Name is “Emergency Leave Approved”**

**4. Related Entity Type ? Employee**

**5. Description “Your emergency leave was approved”.**

**6. Folder “Public Email Templates”.**

**7. Subject “Your Emergency leave was approved”**

**8. In the HTML text enter the given information and click**

**save.**

Dear {{{Employee\_\_c.Name}}}

I hope this email finds you well. We wanted to inform you that

your emergency leave request has been approved.

Please ensure that all pending tasks are delegated, and you

have completed any necessary handovers before proceeding

on your leave.

During your absence, if any urgent matters arise or if there is a

need for any further assistance, please contact the Manager.

4142**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)

**Create User 1**

Go to setup >>> type users in quick find box >>> select users >>>

click New user.

Fill in the fields

**1. First Name: Racheal**

2. Last Name: Marc

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: SVP, Human Resources

8.User license: Salesforce Platform

439.Profiles: Standard Platform User

10. Save.

**Create User 2**

Go to setup >>> type users in quick find box >>> select users >>>

click New user.

Fill in the fields

1. First Name: Dave

2. Last Name: Jone

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: SVP, Sales & Marketing

8. User license: Salesforce Platform

9. Profiles: Standard Platform User

10.Save.

44**Approval Process**

What Is Approval Process In Salesforce?

The Approval Process is an automated process that an org uses

to approve records in Salesforce. For example, When In the

organization, someone is not able to decide a particular thing

then he can ask someone else for approval. So, for such

frequent cases or situations, one can define the approval

process. So, Users can take benefit of such an approval process

whenever needed.

Records submitted for approval are approved by the user(s) in

the organization. These users are called Approvers. A single

Approval process is bound to a single object because when a

rule is defined, this object influences the fields that will be

available to set the criteria.

An approval process consists of finalizing the basic properties of

the approval process (as shown in the below image), approval

steps, and actions to be executed.

Actions In Salesforce Approval Process

There are 4 actions present except the approval steps which

complete an approval process, following are:

45***1. Initial Submission Actions***

Initial submission actions are the actions that occur when a

user first submits a record for approval. By default, an action to

lock the record runs automatically on initial submission. Initial

submission actions can include any approval actions such as

email alerts, field updates, tasks, or outbound messages.

***2. Final Approval Actions***

Final Approval actions are the actions that occur when a record

is approved from all the approval steps. It also locks or unlocks

the record, as specified. It can include any approval actions

such as email alerts, field updates, tasks, or outbound

messages.

***3. Final Rejection Actions***

Final Rejection actions are the actions that occur when a

record is rejected from any of the approval steps. It also locks or

unlocks the record, as specified. It can include any approval

actions such as email alerts, field updates, tasks, or outbound

messages.

***4. Recall Actions***

Recall actions are the actions that occur when a record is

recalled after submission for approval. It can include any

approval actions such as email alerts, field updates, tasks, or

outbound messages.

**Create Approval Process For Emergency Leave**

To create fields in an object:

1.Go to setup >>> Approval Processes in quick find bar >>> click

on it.

46 **2.Manage Approval Process For >>> “Leave” from the drop**

**down.**

47**3.Click on “Create New Approval Process” >>> Use standard**

**setup wizard.**

**4. Process Name “Emergency Leave Approval” >>> Click**

**Next.**

48**5. Field “Leave: Leave Type” >>> Operator : equals, Value >>>**

**Click on the lookup filter icon and select “Emergency**

**Leave”.**

**6.Click insert field, then click Next.**

**7. Field “Leave: Leave Type” >>> Operator : equals, Value >>>**

**Click on the lookup filter icon and select “Emergency**

**Leave”.**

8. Next Automated Approver determined by “Manager” from

the drop down.

Use approver field of leave owner should be marked as

check.

9. Select the “Administrators ONLY can edit records during the

approval process”.Then Next.

4910. Under the Approval Assignment Email Template click in the

lookup icon >>> Lightning >>> Public Email

Templates “Emergency Leave Approved”. Then

Next.

5011. From the available fields select >>> LeaveID, and then add

>>> Add it to the selected Fields. Similarly add the

Owner, LeaveType, Status. Then Next.

• Make sure Display approver history is checked.

• And under security settings check the “Allow approvers to

access the approval page only from within the Salesforce

application. (Recommended)” option.

12. Submitter type Search >>> Owner, Allowed Submitters >>>

Leave Owner. Then Next.

• Make sure Allow submitters to recall approval requests is

checked.

• Then click save.

5113. Once you have saved your approval process, while on the

same page click the approval process.

14. At the approval steps, Click on “New Approval Step”.

15. Enter the name as “Approver1” the unique name will

automatically be updated. Then Next.

5216. All records should enter this step. Then Next.

17. Automatically assign to approvers is to be selected. User:

from the lookup give the user.

18. “Approve or reject based on the FIRST response” is to be

selected. Then click save.

19.While on the same Approval Process page .Under the “Final

Approval Action” click Add New from the drop down

select “Email Alert”.

5320. Description: Your emergency leave request was approved.

Unique name is auto populated.

21. Email Template, click the lookup option and select

Emergency Leave Approved.

5422. Recipient Type : User, Selected Recipient : Leave Owner.

Then click save.

**FlowsWhat is a flow ?**

In Salesforce, a flow is a tool that automates complex business

processes. Simply put, it collects data and then does something

with that data. Flow Builder is the declarative interface used to

build individual flows.

Flows fall into five categories:

Screen Flows: These are flows that have a UI element and

require input from users. These types of flows are either

launched as an action or embedded as an element on a

Lightning page.

55**Schedule-Triggered Flows: These auto launched flows**

**launch at a specified time and frequency for each record in**

**a batch, and they run in the background.**

**Auto launched Flows: Run automated tasks with this flow**

**type. Auto launched flows can be invoked from other flows**

**(subflow), process builder, from within an Apex class, from a**

**set schedule, from record changes, or from platform events.**

**Record-Triggered Flows: These auto launched flows run in**

**the background either before a record save or after the**

**record is saved when a record is created, updated, or**

**deleted.**

**Platform Event-Triggered Flows: When a platform event**

**message is received, these auto launched flows run in the**

**background.**

When and why should we use a flow?

**If you need to generate a new automated business process,**

**or user guided experience that does not reach the**

**complexity threshold for Apex Code, then flow is your go-to**

**tool. If you are modifying an existing process that was built**

**with Process Builder or workflow, then you should consider**

**a number of factors when deciding whether to modify the**

**existing process or migrate it to Flow. Flows are able to**

**create, edit, and delete records in Salesforce, send emails,**

**show relevant data and gather input from users, and**

**generate outbound messages.**

56**Create Flow For Shift To Start**

1. Go to setup >>> type Flow in quick find box >>> Click on

the Flow and Select the New Flow.

2. Select the record Triggered flow. Click on create.

3. Under Object select ”Employee”. Click on A record is created

or updated. Actions and Related Records, Done.

**4. Select Free Form Layout for the flow and then Click on**

**the Manager option, You will find “New Resource”**

**5. Select “Text Template”**

**6. Then API name should be filled as “Email Body”, And**

**enter the given details in it**

**{!Emailbody}**

Just a quick note to inform you that your shift has now started.

We're excited to have you on board and ready to make a

positive impact today!

Should you need any support or have any questions during your

shift, don't hesitate to reach out to your team members or

supervisor.

Health Issues If Any: {!$Record.Health\_Issues\_If\_Any\_\_c}

Existing Insurance: {!$Record.Existing\_Health\_Insurance\_\_c}

57Travel Allowance: {!$Record.Travel\_Allowance\_\_c}

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7. Click “New Resource” under manager.

8. Select “Text Template”

9. Then API name should be filled as “Subject”.And enter the

given details in it (Hi this is to inform you that your

shift has just started.) Make sure it is “view as plain text”.

10. Click Done.

**11. Drag the “Action” element from the toolbox onto the**

**screen.**

**12. Under Category dropdown select Email, Then in the**

**action bar select “ Send Email ” action.**

13. Give API name as “Shift Started”.

14. Change the toggle to “Include the Body” Select

{!Emailbody} from the dropdown.

15. Change the toggle to “Include the Subject”

Select{!Subject} from the dropdown.

16. Change the toggle for recipient address list to include.

From the dropdown select “{!$Record.Email\_Id\_\_c}”

17. And then click save, and click on activate.

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**Create Flow For Email Alert**

1. Go to setup >>> type Flow in quick find box >>> Click on

the Flow and Select the New Flow.

2. Select the record Triggered flow. Click on create.

3. Under Object select ”Leave”. Click on A record is created

or updated. Actions and Related Records, Done.

4.

Select Free Form Layout for the flow and then Click on the

Manager option, You will find “New Resource”

5.

Select “Text Template”

6.

Label it as “Leave Mail”. And mention the given details

Dear {!$Record.Employee\_\_r.Name}

This is to inform you that your application to leave has

been granted. For further queries you may contact

your manager. Click Done.

7.

Drag the “Action” element from the toolbox onto the

screen.63

8.

Under Category dropdown select Email, Then in the

action bar select “Send Email” action.

9.

Give API name as “Email Alert”.

10. Change the toggle to “Include the Body” and select “leave

mail” from dropdown.64

11.

Change the toggle to “Include Recipient Address List”.

From the dropdown select

“{!$Record.Employee\_\_r.Email\_Id\_\_c}”

12. Change the toggle to “Subject”. In the enter text type “Leave

info” and then click done.

13. Make sure it is view as plain text.**14. And then click save, and click on activate.**

**Create Records For The Employee Object**

1. Go to App Launcher >>> click on Employee Mapp.

2. Click on the employee Tab .Click on New.

3. Fill in the employee details.

654. Give the employee name, email, date of birth, gender, salary

all the fields are to be filled including shift timings.

5. Make sure you fill the location in terms of latitude and

longitude as shown below.

6. Then click save and new.(Similarly create more records in the

employee object)

**Create Records For The Organization Object.**

1. Click on the organization Tab .Click on New.

662. Give the Organization name, email, phone all the fields are

to be filled including organization location.

3. Make sure you fill the location in terms of latitude and

longitude as shown below.

Then click save and new.(Similarly create more records in

the organization object)

**Create Records For The Health Insurance Object**

1. Click on the health insurance Tab .Click on New.

2. Give the Insurance Company Name. Click save and New .

Similarly create few more records.

67**Create Records For The Leave Object.**

1. Click on the Leave Tab .Click on New.

2. Fill The leave details.

3. Click save and New. Similarly create few more records.

**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

Let’s create a Report.

68**Note: (Make sure to create records in Employee,**

**Organization, Health Insurances, Leaves)**

**Create Report**

1. Go to the app >>> click on the reports tab

2. Click New Report.

3. Select report type from category or from report type panel or

from search panel >>> click on start report.

4. Select report >>> Employees with Organizations with Travel

Allowances , Then click on start report.

5. Once you click on start report you will see that the records

you have created would be displayed.

6.Group the columns according to your preference from the

dropdown as shown.

7. Save your report as Travel Allowance Report. And run it.

6970**8. Similarly create a report for Organizations with Employees**

**and Health Insurances and save it as “Employee and health**

**insurances”.**

**9. Similarly create a report for Leave with employee and save**

**it as “Employee leave details”.**

**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.**

**Create Dashboard**

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

**2. Give a Name and click on Create.**

**3. Select add component.**

**4. Select a Report and click on select.**

**5. Add the component on the dashboard.**

**6. Click save then done.**

7273**Apex**

**Apex OverView**Apex is a strongly typed, object-oriented

programming language that allows developers to execute flow

and transaction control statements on the Lightning platform

server in conjunction with calls to the Lightning Platform? API.

Using syntax that looks like Java and acts like database stored

procedures, Apex enables developers to add business logic to

most system events, including button clicks, related record

updates, and Visualforce pages. Apex code can be initiated by

Web service requests and from triggers on objects.

74**It is as similar as java i.e, it also supports OOP( Object**

**oriented programming) like Classes, objects, methods.**

Creating Classes :

**Apex classes are modeled on their counterparts in Java.**

**You’ll define, instantiate, and extend classes, and you’ll work**

**with interfaces, Apex class versions, properties, and other**

**related class concepts.**

Class :

**As in Java, you can create classes in Apex. A class is a**

**template or blueprint from which objects are created. An**

**object is an instance of a class.**

Object :

Object is an instance of a class, where it can access all the

properties that are present in a class i.e, variables and methods.

**Create A Trigger In Apex**

1. Login to the trailhead account and navigate to the gear

account in the top right corner.

2. Then we can see the Developer console. Click on the

developer console and you will navigate to a new console

window.

3. Then you can see many tools in the Toolbar of the new

console window. Click on File, New and Apex Trigger.

4. Enter the name “LeaveTrigger” select the sObject from the

list “leave\_\_c”.

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**5. Enter the given code in the console, check for errors and**

**save.trigger LeaveTrigger on Leave\_\_c (before insert) {**

**if(trigger.isBefore){**

**if(trigger.isInsert){**

**LeaveTriggerHandler.ifMaleEmployee(trigger.new);**

**}**

**}**

**}**

**Create A Class In Apex**

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1. **Then you can see many tools in the Toolbar of the new**

**console window. Click on File, New and Apex Class.**

**2. Enter the name “LeaveTriggerHandler” click ok.**

**3. Enter the given code in the console.**

**public class LeaveTriggerHandler {**

public static void ifMaleEmployee(List<Leave\_\_c>

leaveRequests) {

// Fetch employees related to leave requests

Set<Id> employeeIds = new Set<Id>();

for (Leave\_\_c leaveRequest : leaveRequests) {

if (leaveRequest.Employee\_\_c != null) {

employeeIds.add(leaveRequest.Employee\_\_c);

}

}

// Fetch employee records

Map<Id, Employee\_\_c> employeesMap = new Map<Id,

Employee\_\_c>([SELECT Id, Gender\_\_c FROM Employee\_\_c

WHERE Id IN :employeeIds]);

// Check eligibility for maternity leave and gender

for (Leave\_\_c leaveRequest : leaveRequests) {

if (leaveRequest.Leave\_Type\_\_c == 'Maternity Leave') {

Employee\_\_c emp =

employeesMap.get(leaveRequest.Employee\_\_c);

if (emp != null && emp.Gender\_\_c != null &&

emp.Gender\_\_c == 'Male') {

leaveRequest.addError('Male employees are not

eligible for Maternity Leave'); }

}

}

}

}

4. Check for errors and save it.

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