

UNIVERSITY COLLEGE OF ENGINEERING, NAGERCOIL

NAAN MUDHALVAN PROJECT REPORT

DEPARTMENT OF MECHANICAL ENGINEERING

TOPIC: Streamlined Employee Detail Management

Submitted by

Hari Krishnan C

Kuttalam Pillai M

Sabarish L

Balaarun R



ANNAUNIVERSITY:CHENNAI600025

Streamlined Employee Detail Management

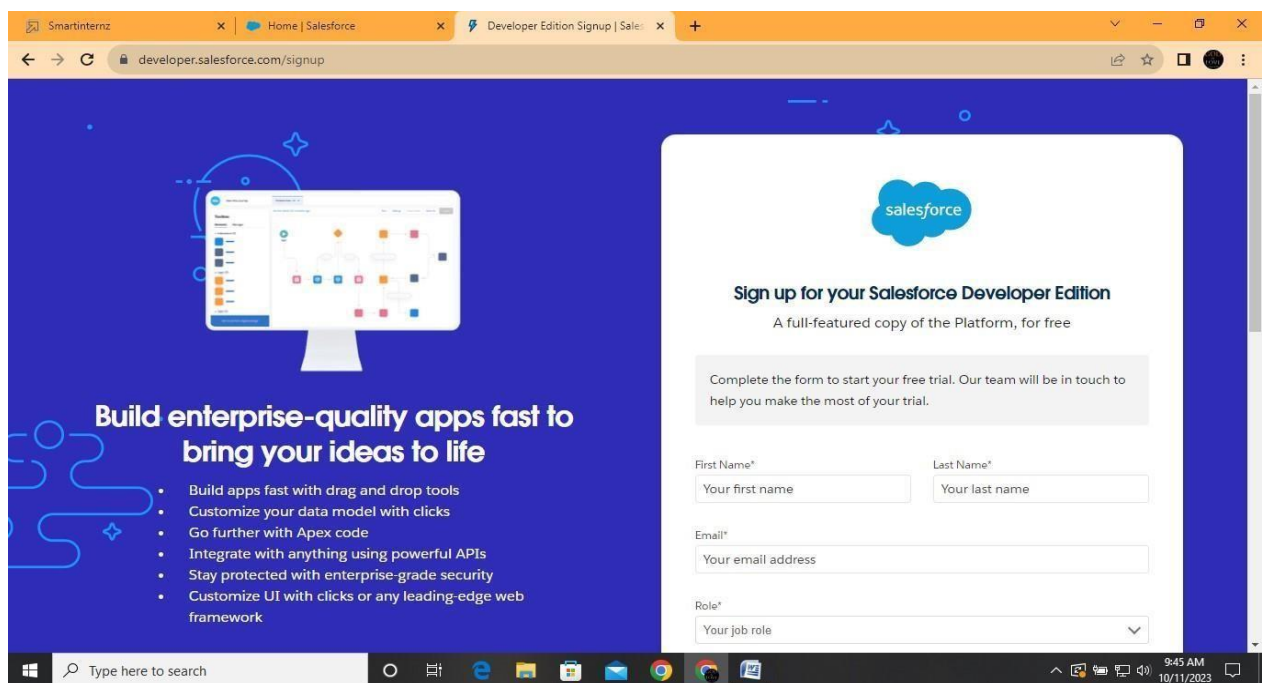
Developer-(Short-Term)

Introduction 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.

Milestone–01: Create a Developer Org

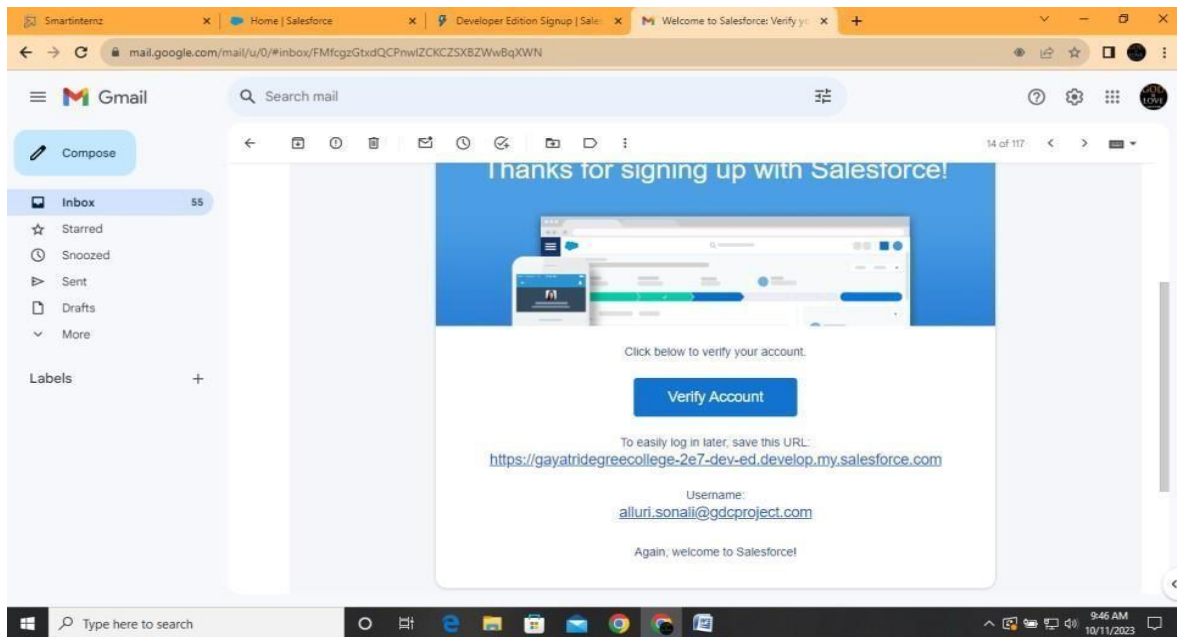
- 1.Go to developers.salesforce.com/
- 2.Clickonsignup.
- 3.On the signup form,enter the following details:

- a. Firstname&Lastname– **SABARISH L**
- b. Email–**sabarishl2003@gmail.com**
- c. Role:**Developer**
- d. Company:**UNIVERSITY COLLEGE OF ENGINEERING, NAGERCOIL**
- e. County:**India**
- f. PostalCode:**629004**
- g. Username:**sabarish32@company.sandbox**

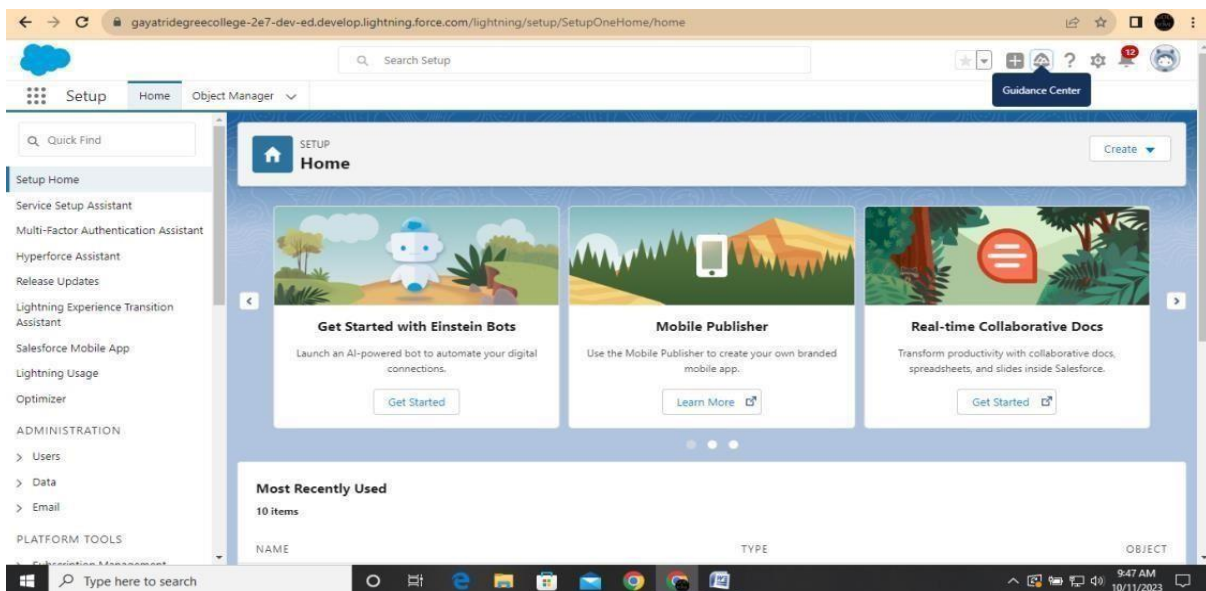


AccountActivation

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



1. LoginToYourSalesforceAccount
2. Gotosalesforce.comandclickonlogin.
3. Entertheusernameandpasswordthatyoujustcreated.
4. 3.Afterloginthisisthehomepagewhichyouwillsee.



Milestone02:objects creation

Object– Employee Object

1. Click on the object manager adjust beside the home tab.
2. Aftertheabovesteps,havealookontheextremerightyouwillfindaCreateDropdownclickonthatandselectCustomObject
3. OntheCustomObjectDefinitionpage,createtheobjectasfollows:
4. Label: Employee Object
5. Plural Label: Employees
6. Record Name: Employee
7. ChecktheAllowReportscheckbox
8. ChecktheAllowSearchcheckbox
9. ClickSave

Object– Organization Object

1. Click on the gear icon and then select Setup.
2. Clickontheobjectmanagertabjustbesidethehometab.
3. Aftertheabovesteps,havealookontheextremerightyouwillfindaCreateDropdownclickonthatandselectCustomObject
4. OntheCustom ObjectDefinitionpage,createtheobjectasfollows:
5. Label: **Organization**
6. PluralLabel: **Organization**
7. RecordName: **Organization** (AutoNumber)
8. ChecktheAllowReportscheckbox
9. ChecktheAllowSearchcheckbox
10. ClickSave.

Object– Health Insurance Object

1. Click on the gear icon and then select Setup.
2. Click on the **object manager** tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: **Health Insurance**
6. Plural Label: **Health Insurance**
7. Record Name: **Health Insurance name**(AutoNumber)
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save

Object–Leave Object

1. Click on the gear icon and then select Setup.
2. Click on the **object manager** tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: **Leave**
6. Plural Label: **Leave**
7. Record Name: **Leave name**(AutoNumber)
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save

Browser tabs: Inbox (4,053) x, Work better t... x, Brainstorming x, Empathy_map x, Your Reposit... x, ChatGPT x, Download file x, Home | Salesf... x, Object Manag... x

Address bar: universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Navigation: Setup, Home, Object Manager

Object Manager Header: 153+ Items, Sorted by Label

Object Name	API Name	Object Type	Created Date	Status	Actions
Email Message	EmailMessage	Standard Object			
Employee	Employee__c	Custom Object	20/10/2023	✓	▼
Engagement Channel Type	EngagementChannelType	Standard Object			
Engagement Channel Work Type	EngagementChannelWorkType	Standard Object			
Entitlement	Entitlement	Standard Object			
Entitlement Contact	EntitlementContact	Standard Object			
Equipment Maintenance Item	Equipment_Maintenance_Item__c	Custom Object	22/10/2023	✓	▼
Event	Event	Standard Object			
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object			
Finance Transaction	FinanceTransaction	Standard Object			
Health Insurance	Health_Insurance__c	Custom Object	20/10/2023	✓	▼
Image	Image	Standard Object			
Incident	Incident	Standard Object			

Windows Taskbar: Type here to search, ENG 10:27 PM IN 31-Oct-23

Browser tabs: Inbox (4,053) x, Work better t... x, Brainstorming x, Empathy_map x, Your Reposit... x, ChatGPT x, Download file x, Home | Salesf... x, Object Manag... x

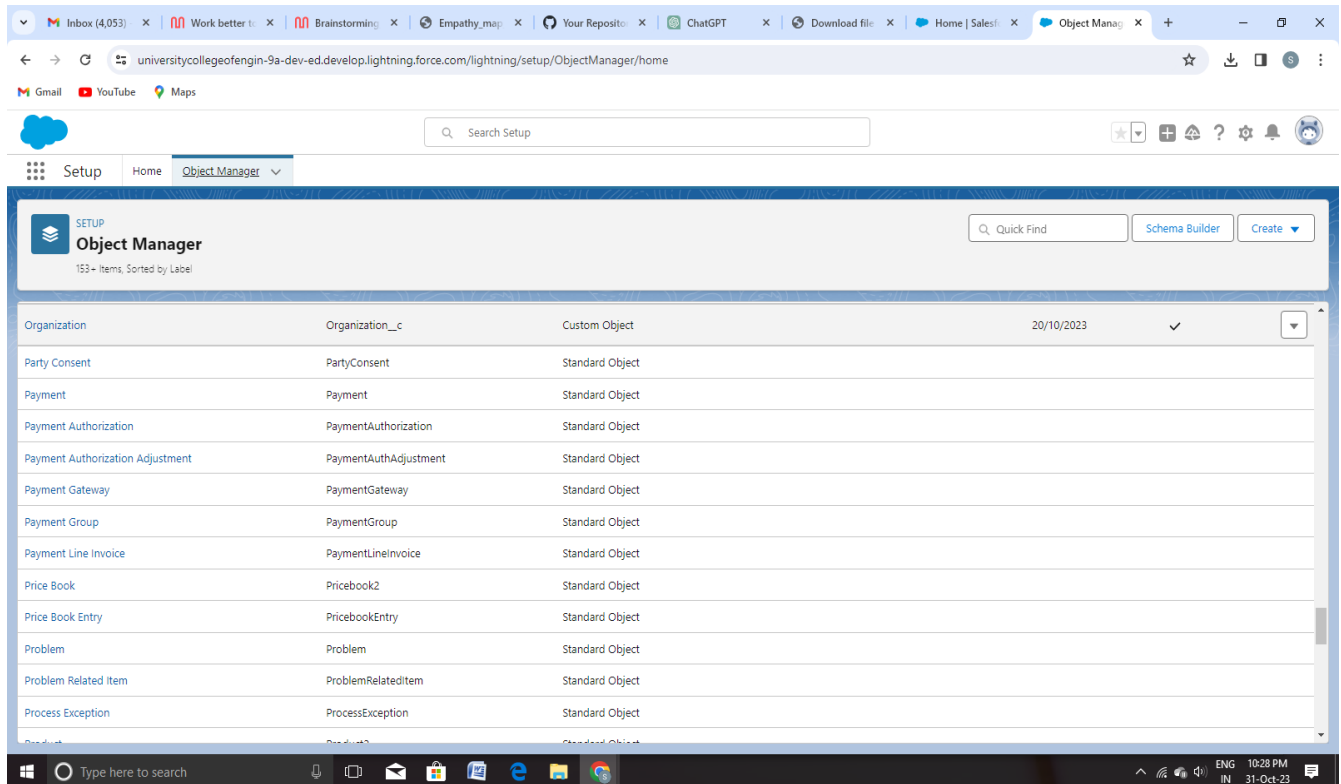
Address bar: universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Navigation: Setup, Home, Object Manager

Object Manager Header: 153+ Items, Sorted by Label

Object Name	API Name	Object Type	Created Date	Status	Actions
Lead	Lead	Standard Object			
Leave	Leave__c	Custom Object	20/10/2023	✓	▼
Legal Entity	LegalEntity	Standard Object			
List Email	ListEmail	Standard Object			
Location	Location	Standard Object			
Location Group	LocationGroup	Standard Object			
Location Group Assignment	LocationGroupAssignment	Standard Object			
Macro	Macro	Standard Object			
Messaging Session	MessagingSession	Standard Object			
Messaging User	MessagingEndUser	Standard Object			
Object Milestone	EntityMilestone	Standard Object			
Operating Hours	OperatingHours	Standard Object			
Operating Hours Holiday	OperatingHoursHoliday	Standard Object			
Opportunity	Opportunity	Standard Object			

Windows Taskbar: Type here to search, ENG 10:28 PM IN 31-Oct-23



Milestone 03:

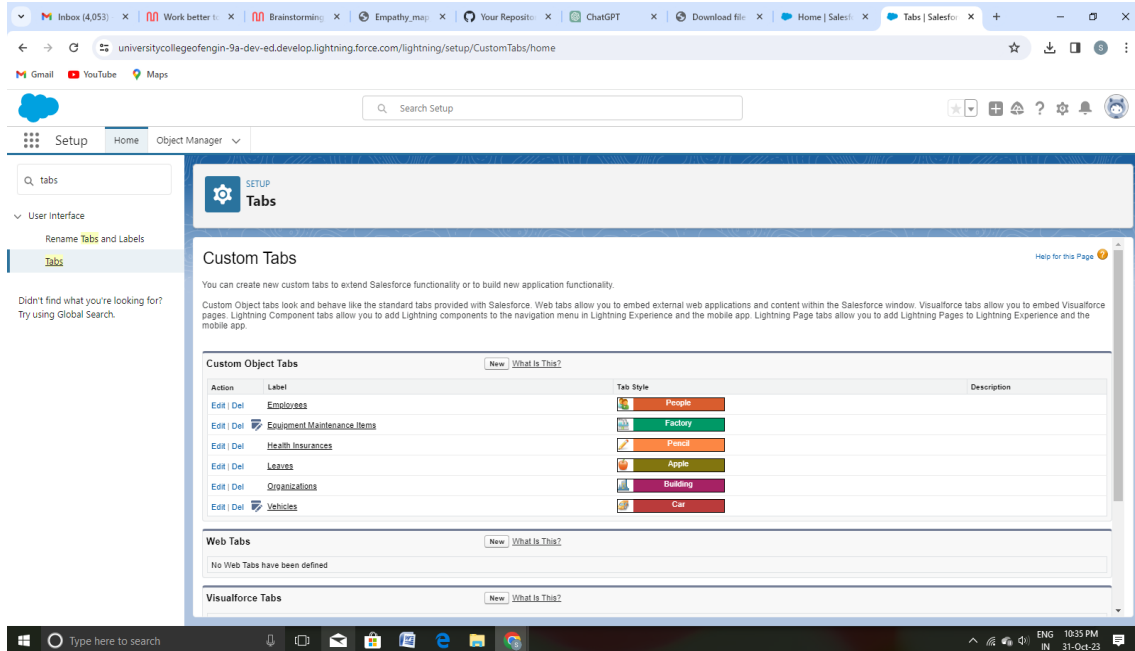
Creation of Tabs Tab-

Departments

1. Navigatetosetupandhome
2. EnterTabsinQuickFindBoxandselectTabs
3. UnderCustomObjectTabs,clickNew
4. ForObject,select**Department**
5. ForTabStyle,selectanyicon
6. Leavealldefaultsis.ClickNext,Next,andSave**Tab—department**
1. NavigatetosetupandenterTabsinQuickFindandselectTabs.UnderCustomObjectTabs,clickNew.
2. ForObject,select**Department.**
3. ForTabStyle,selectanyicon.
4. Leavealldefaultsis.ClickNext,Next,andSave

Tab– Employees, Organization, Health Insurance, Leave

1. NavigatetosetupandenterTabsinQuickFindandselectTabsUnderCustomObjectTabs,clickNew
2. ForObject,select ForTabStyle,select any icon
3. Leavealldefaultsasis.CNext,Next,and Save click



Milestone-04:

Relationships Between Two Objects

RelationshipCreation

Fields Creation: Employees, Organization, Health Insurance, Leave

1. Navigate to setup
2. ClickonObjectManagerandsearchandselectVisaSlotobject
3. SelectFields&RelationsandclickNew.
4. SelectDataType:Text(45),next.
5. Relatedto: ,next.
6. Label: Employees, Organization, Health Insurance, Leave
7. ChildRelationshipName:Department,next.
8. Next,nextandsave.

universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004XFDj/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Employee

Details
Fields & Relationships
19 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Age	Age__c	Formula (Number)		
Created By	CreatedById	Lookup(User)		
Date of birth	Date_of_birth__c	Date		
Designation	Designation__c	Picklist		
Distance	Distance__c	Formula (Number)		
Email Id	Email_Id__c	Email		
Employee Location	Employee_Location__c	Geolocation		
Employee Name	Name	Text(80)		✓
Existing Health Insurance	Existing_Health_Insurance__c	Checkbox		

Type here to search

ENG IN 10:46 PM 31-Oct-23

universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004XFDj/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Health Insurance

Details
Fields & Relationships
5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Insurance Company Id	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(20)		
Owner	OwnerId	Lookup(User,Group)		✓

Type here to search

ENG IN 10:46 PM 31-Oct-23

universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004XFDt/FieldsAndRelationships/view

Organization

Fields & Relationships

9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Company Name	Company_Name__c	Text(80)		
Created By	CreatedById	Lookup(User)		
Email Id	Email_Id__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Organization Location	Organization_Location__c	Geolocation		
Organization Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
Website	Website__c	URL(255)		

universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115g000004XFE3/FieldsAndRelationships/view

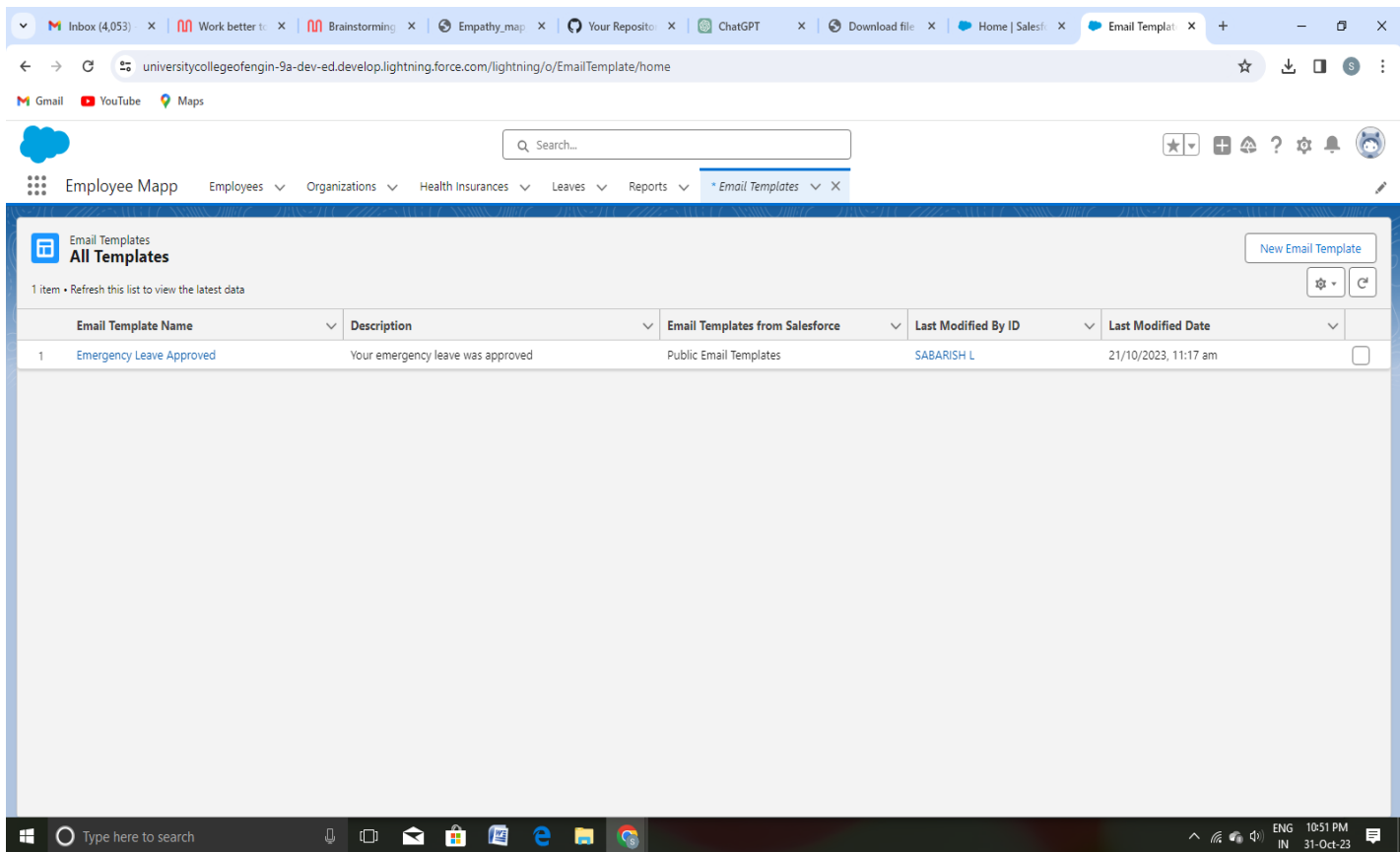
Leave

Fields & Relationships

10 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Duration	Duration__c	Formula (Number)		
End Date	End_Date__c	Date		
Health Insurance	Health_Insurance__c	Lookup(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Leave Name	Name	Auto Number		✓
Leave Status	Leave_Status__c	Picklist		
Leave Type	Leave_Type__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Start Date	Start_Date__c	Date		

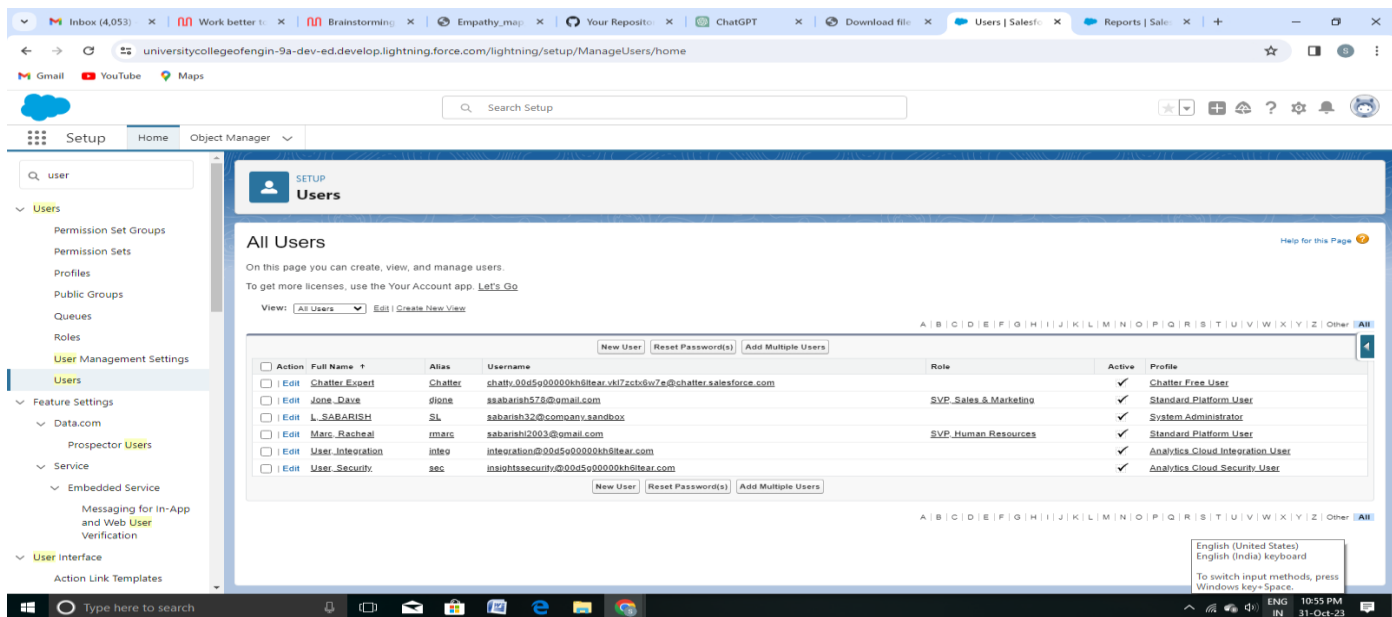
Milestone-05: Email Templates



The screenshot shows the Salesforce 'Email Templates' page. The browser address bar displays 'universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/o/EmailTemplate/home'. The page header includes a search bar and navigation tabs for 'Employee Mapp', 'Employees', 'Organizations', 'Health Insurances', 'Leaves', 'Reports', and 'Email Templates'. The main content area is titled 'Email Templates' and 'All Templates', with a 'New Email Template' button. Below this is a table with one item: 'Emergency Leave Approved'. The table columns are 'Email Template Name', 'Description', 'Email Templates from Salesforce', 'Last Modified By ID', and 'Last Modified Date'.

Email Template Name	Description	Email Templates from Salesforce	Last Modified By ID	Last Modified Date
Emergency Leave Approved	Your emergency leave was approved	Public Email Templates	SABARISH L	21/10/2023, 11:17 am

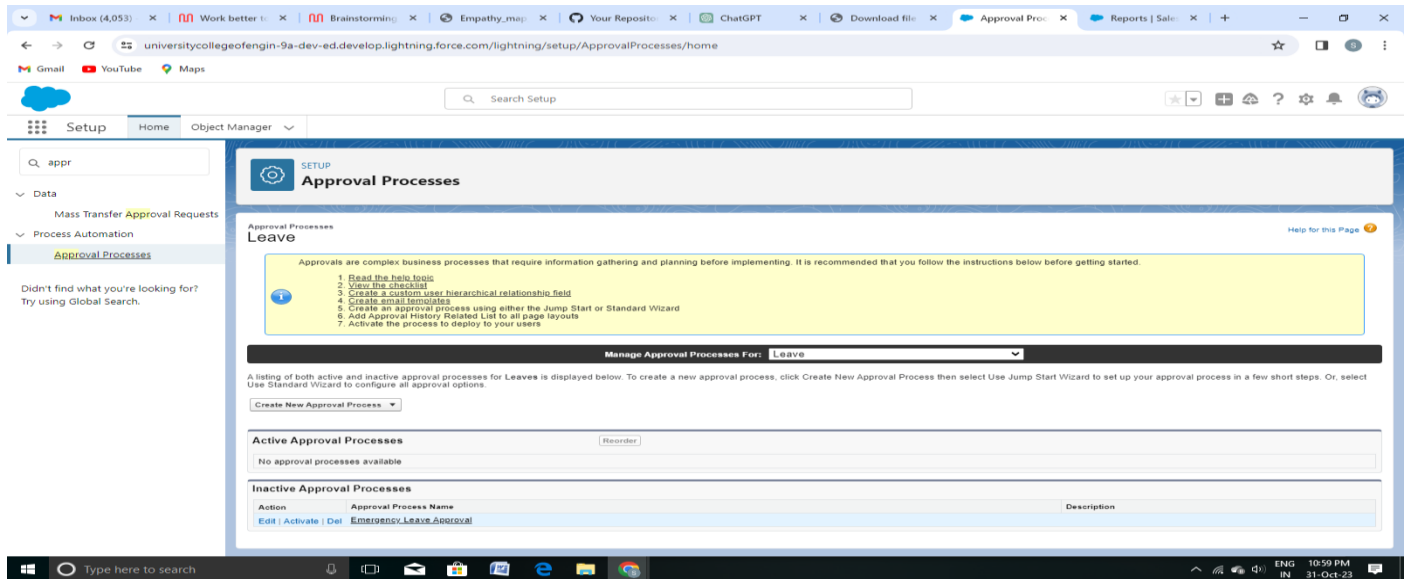
Milestone-06 : Users



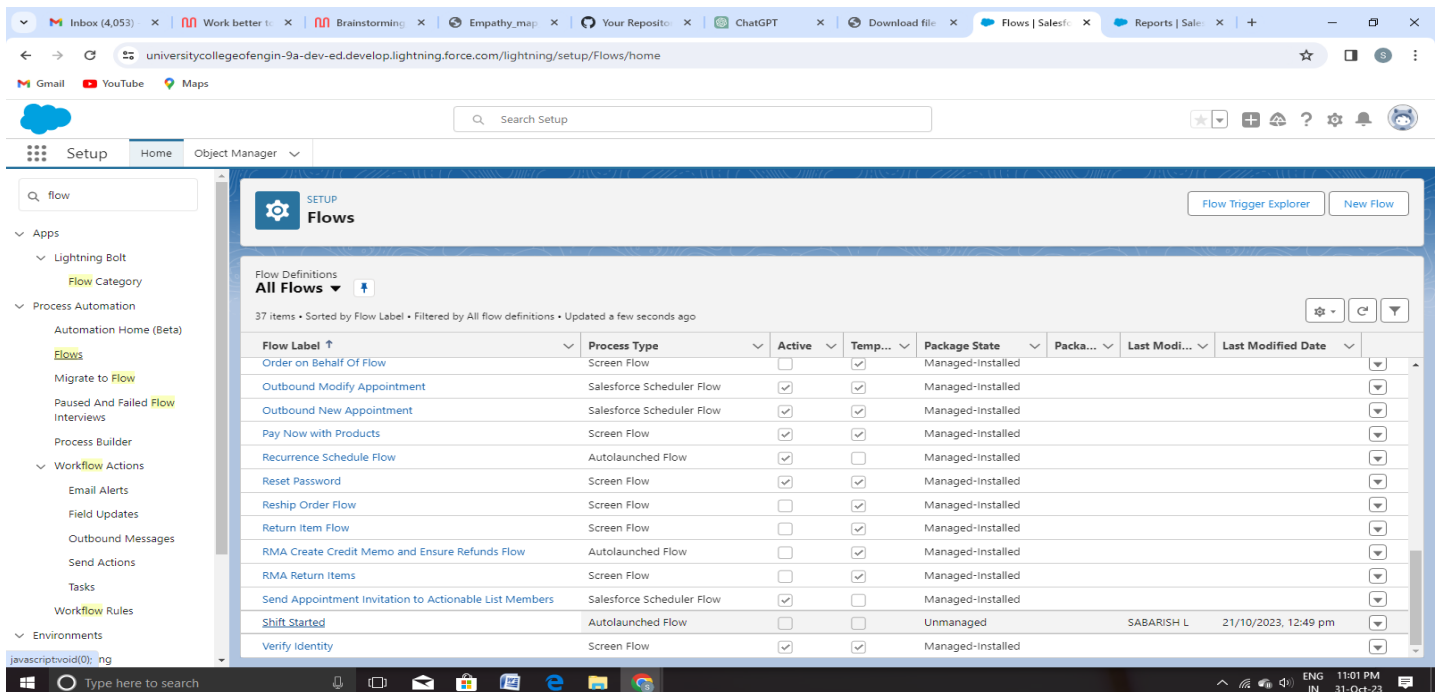
The screenshot shows the Salesforce 'Users' page. The browser address bar displays 'universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home'. The page header includes a search bar and navigation tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Users' and 'All Users', with a 'New User' button. Below this is a table with columns: 'Action', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. The table lists several users, including 'Chatter_Eveest', 'Jone_Dave', 'L_SABARISH', 'Marc_Racheal', 'User_Integration', and 'User_Security'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter_Eveest	Chatter	chatter.00d50000000000000000000000000000@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Jone_Dave	djone	sabarish32@gmail.com	SVP_Sales & Marketing	✓	Standard Platform User
<input type="checkbox"/> Edit	L_SABARISH	SL	sabarish32@company.sandbox		✓	System Administrator
<input type="checkbox"/> Edit	Marc_Racheal	rmars	sabarish2003@gmail.com	SVP_Human Resources	✓	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	inteo	integration@00d50000000000000000000000000000@chatter.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d50000000000000000000000000000@chatter.com		✓	Analytics Cloud Security User

Milestone-07 : Create Approval Process For Emergency Leave



Milestone-08: Flows



Milestone-09 : Reports

The screenshot shows the Salesforce Reports interface. The browser's address bar displays the URL: `universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru`. The page header includes a search bar and navigation tabs for Employee Mapp, Employees, Organizations, Health Insurances, Leaves, and Reports. The left sidebar contains a navigation menu with options like Recent, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, and All Favorites. The main content area shows a list of recent reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Two reports are listed: 'Employee leave details' and 'New Organizations with Employees Report', both created by SABARISH L on 21/10/2023.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Employee leave details		Private Reports	SABARISH L	21/10/2023, 1:50 pm	
Created by Me	New Organizations with Employees Report		Private Reports	SABARISH L	21/10/2023, 1:48 pm	

Milestone-10 : Apex Triggers

The screenshot shows the Salesforce Apex Triggers page. The browser's address bar displays the URL: `universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/setup/ApexTriggers/home`. The page header includes a search bar and navigation tabs for Setup, Home, and Object Manager. The left sidebar contains a navigation menu with options like Email, Custom Code, Apex Classes, Apex Settings, Apex Test Execution, Apex Test History, Apex Triggers, Development, Org Shape, Environments, Jobs, Apex Flex Queue, and Apex Jobs. The main content area shows the Apex Triggers page with a header section, a description, a green box indicating the Percent of Apex Used (0.08%), and a table of triggers. The table has columns: Action, Name, Namespace Prefix, sObject Type, Api Version, Status, Size Without Comments, Last Modified By, and Has Trace Flags. Two triggers are listed: 'LeaveTrigger' and 'MaintenanceRequest'.

Apex Triggers

This page allows you to view and modify all the triggers in your organization. To create a new trigger, navigate to the appropriate sObject triggers page.

Percent of Apex Used: 0.08%
You are currently using 4,843 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 8,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Compile all triggers

View: All Create New View

Action	Name	Namespace Prefix	sObject Type	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del	LeaveTrigger		Leave	59.0	Active	53	SABARISH L, 21/10/2023, 1:56 pm	
Edit Del	MaintenanceRequest		Case	45.0	Active	69	SABARISH L, 22/10/2023, 2:05 pm	

