UNIVERSITYCOLLEGEOFENGINEERING,NAGERCOIL

NAAN MUDHALVAN PROJECT REPORT

DEPARTMENTOFMECHANICALENGINEERING

TOPIC: Streamlined Employee Detail Management

Submittedby

Hari Krishnan C
Kuttalam Pillai M
Sabarish L
Balaarun R

ANNAUNIVERSITY:CHENNAI600025

ProjectReporton

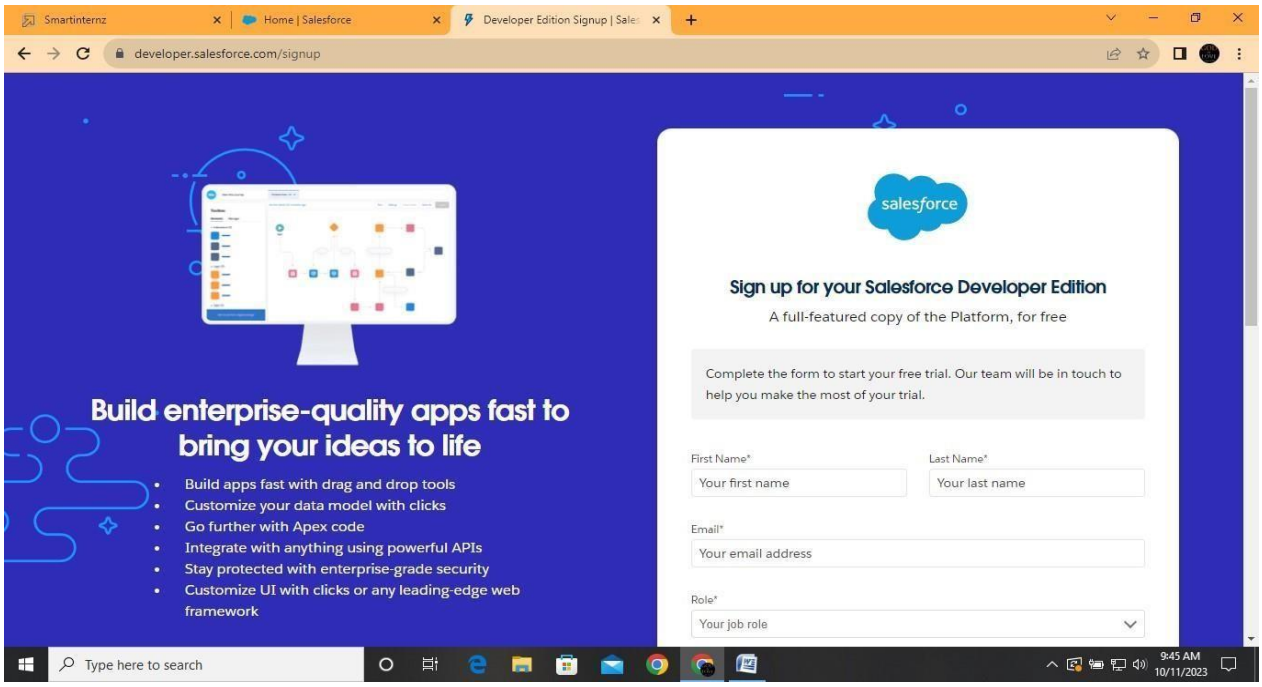
Streamlined Employee Detail Management

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.

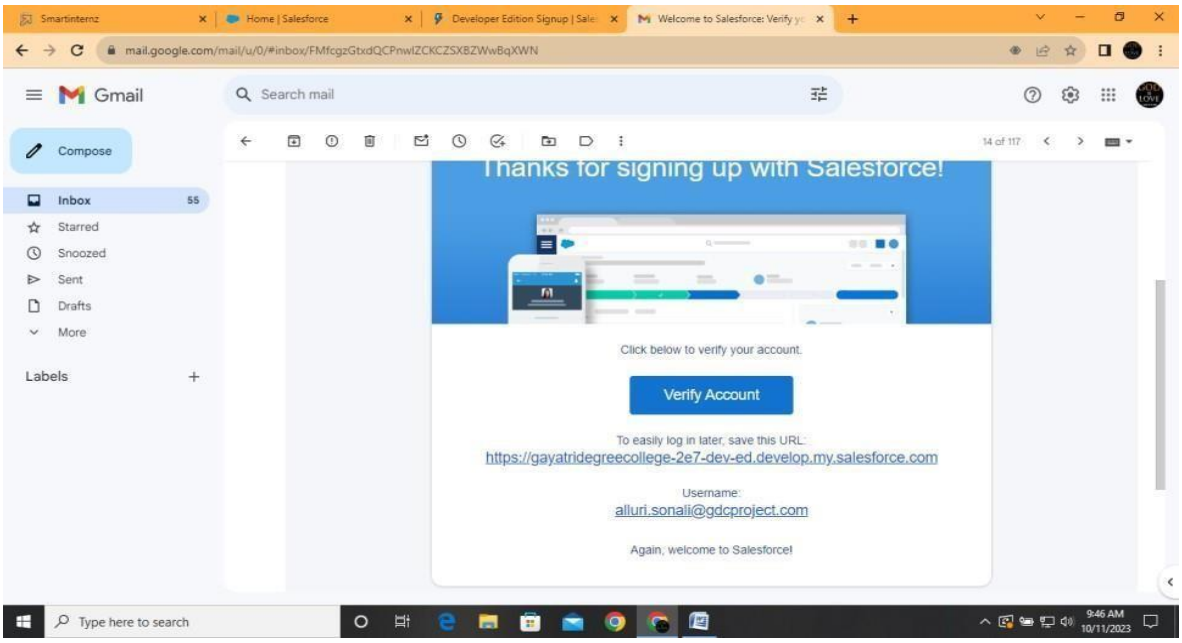
Milestone–01: Create a Developer Org

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

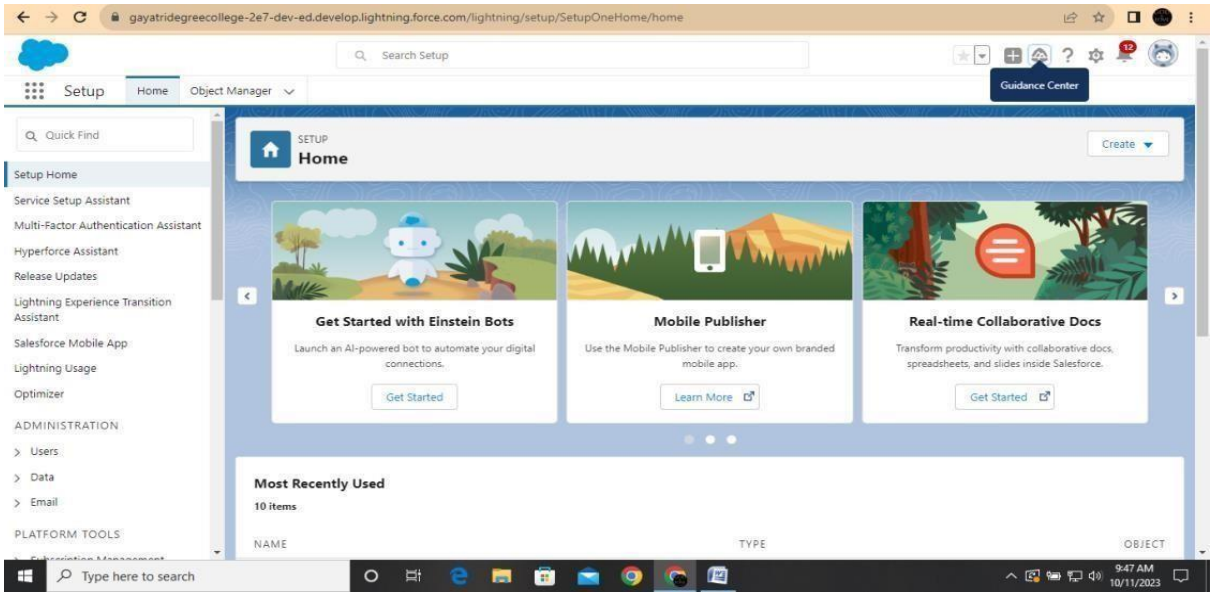


AccountActivation

GototheinboxoftheemailthatyouusedwhilesigningUp.ClickontheverifyaccounttoactivateyouraccountThe emailmay take5-10mins,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

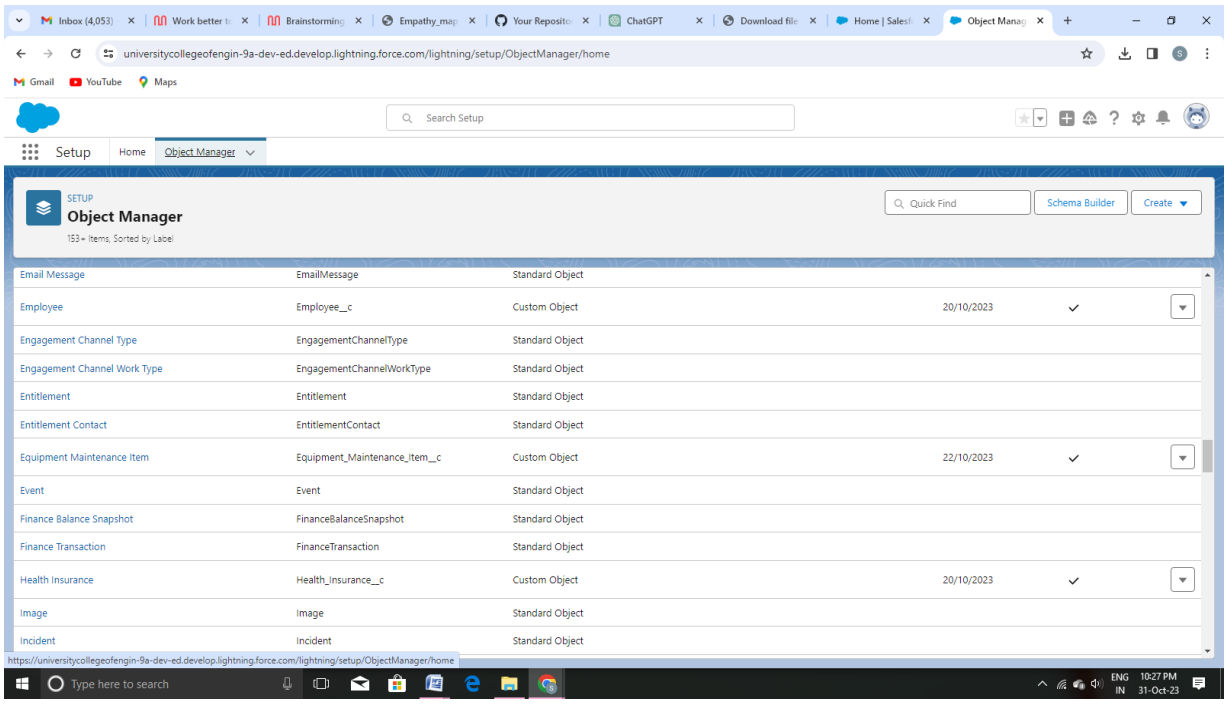
1. Click on the gear icon and then select Setup.
2. Clickontheobjectmanagertabjustbesidethehometab.
3. Aftertheabovesteps,havealookontheextremerightyouwillfindaCreateDropdown clickonthatandselectCustomObject
4. OntheCustom ObjectDefinitionpage,createtheobjectasfollows:
5. Label: **Organization**
6. PluralLabel: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

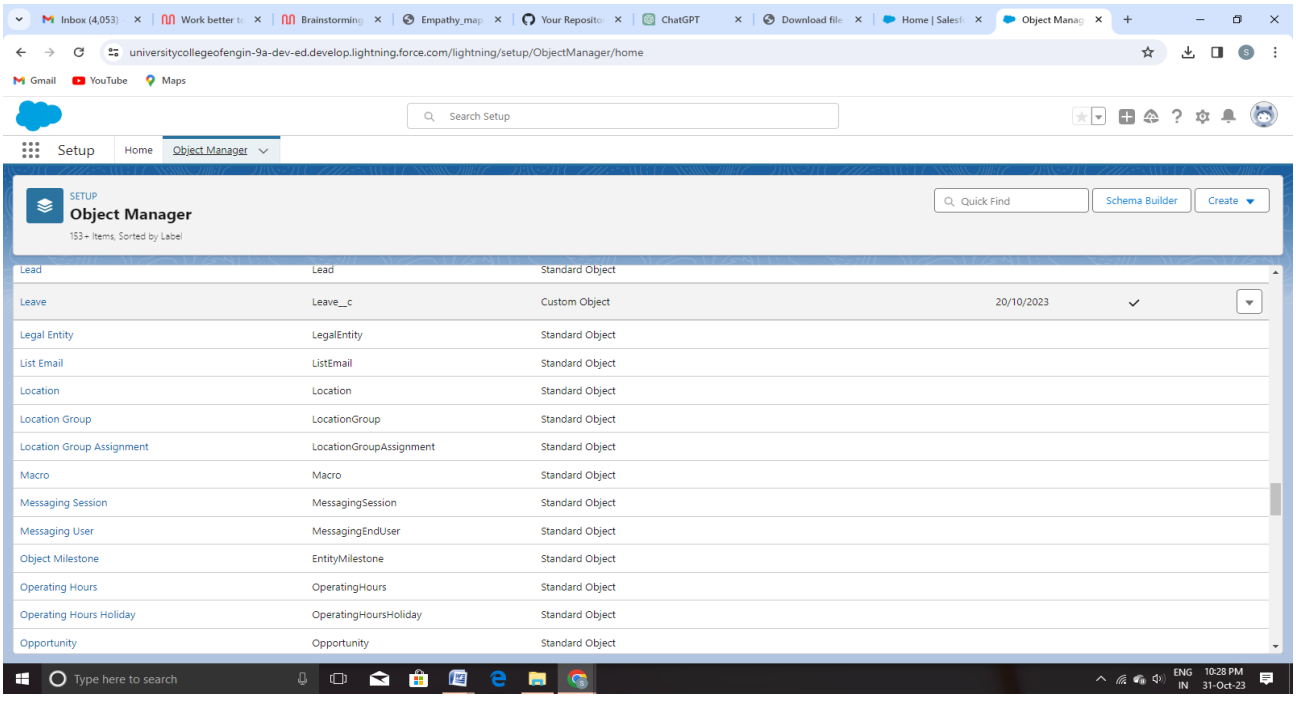
Object– Health Insurance Object

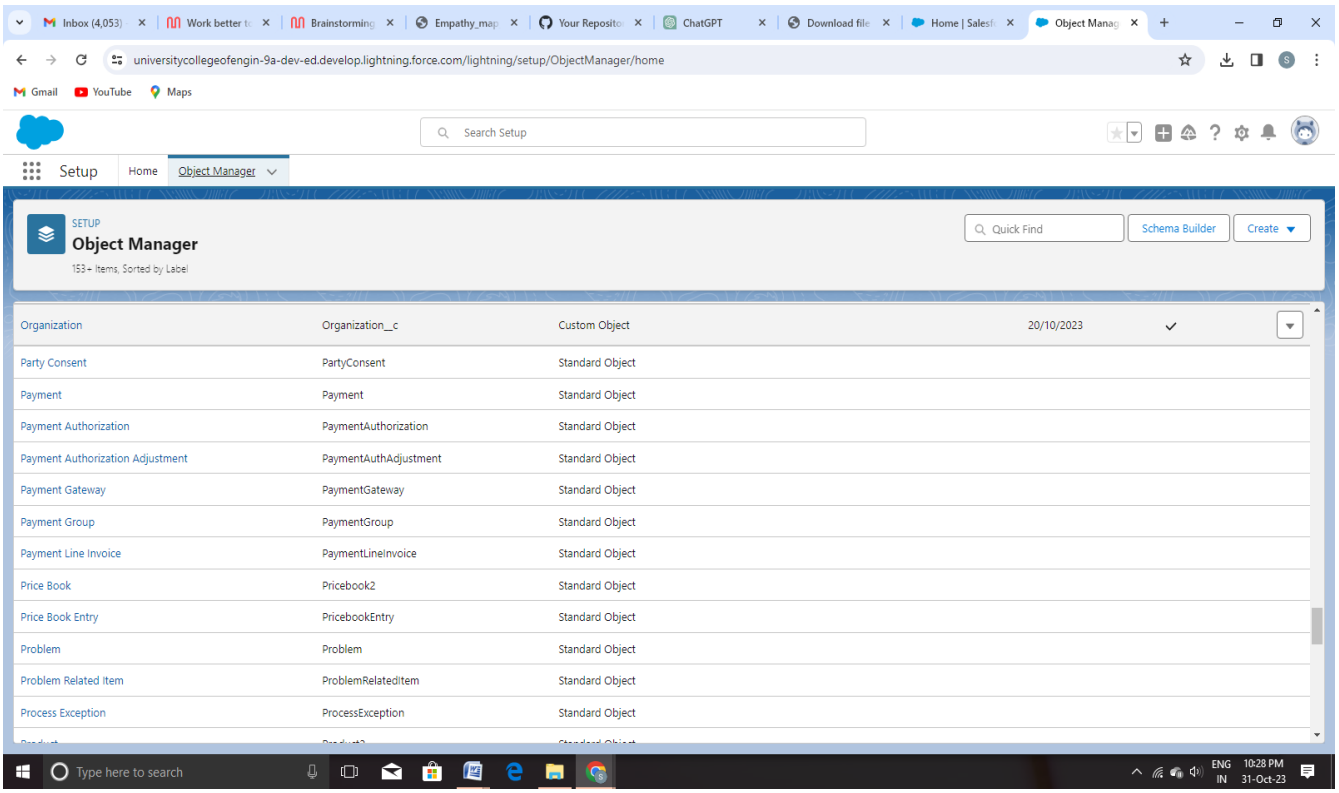
1. ClickonthegeariconandthenselectSetup.
2. Clickonthe**objectmanager**tabjustbesidethehometab.
3. Aftertheabovesteps,havealookontheextremerightyouwillfindaCreateDrop downclickonthat andselectCustomObject.
4. OntheCustom ObjectDefinitionpage,createtheobjectasfollows:
5. Label: **Health Insurance**
6. Plural Label: **Health Insurance**
7. Record Name: **Health Insurance name**(AutoNumber)
8. ChecktheAllowReportscheckbox
9. ChecktheAllowSearchcheckbox
10. ClickSave

Object–Leave Object

1. Click onthegeariconandthenselectSetup.
2. Clickonthe**objectmanager**tabjustbesidethehometab.
3. Aftertheabovesteps,havealookontheextremerightyouwillfindaCreateDrop downclickonthat andselectCustomObject.
4. OntheCustom ObjectDefinitionpage,createtheobjectasfollows:
5. Label: **Leave**
6. PluralLabel: **Leave**
7. RecordName: **Leave name**(AutoNumber)
8. ChecktheAllowReportscheckbox
9. ChecktheAllowSearchcheckbox
10. ClickSave


universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
153+ Items, Sorted by Label
Quick Find
Schema Builder
Create
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
Type here to search


universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
153+ Items, Sorted by Label
Quick Find
Schema Builder
Create
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
Type here to search



Milestone 03:

CreationofTabsTab-

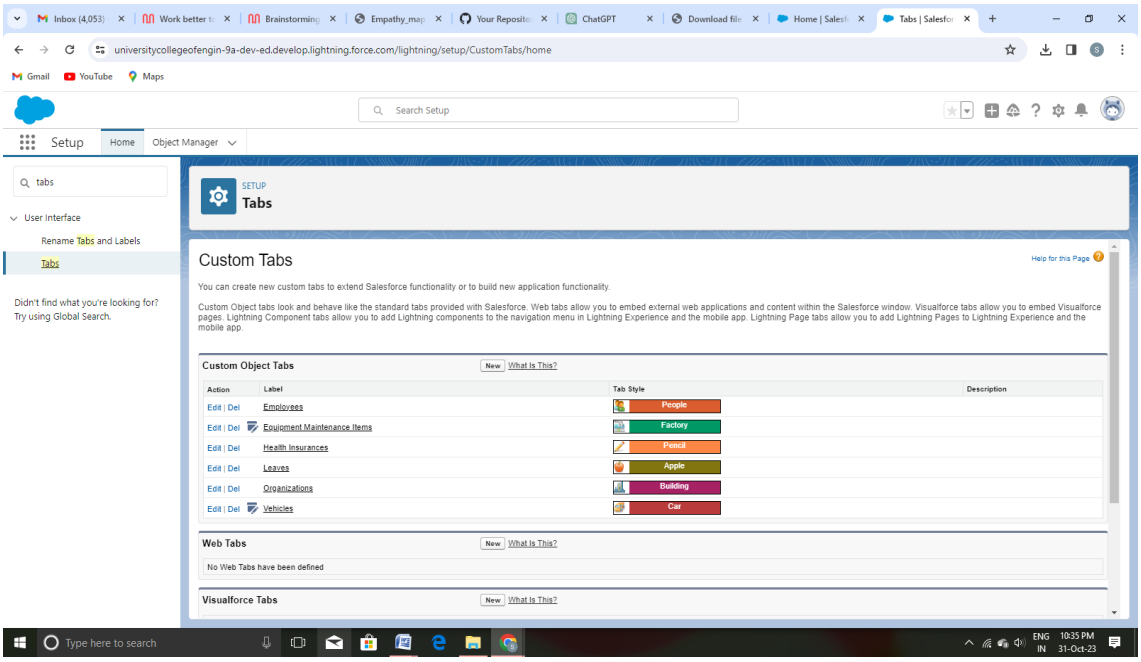
Departments

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

1. NavigatetosetupandenterTabsinQuickFindandselectTabs.UnderCustomObjectTabs,clickNew.
2. ForObject,select**Department.**
3. ForTabStyle,selectanyicon.
4. Leavealldefaultsasis.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



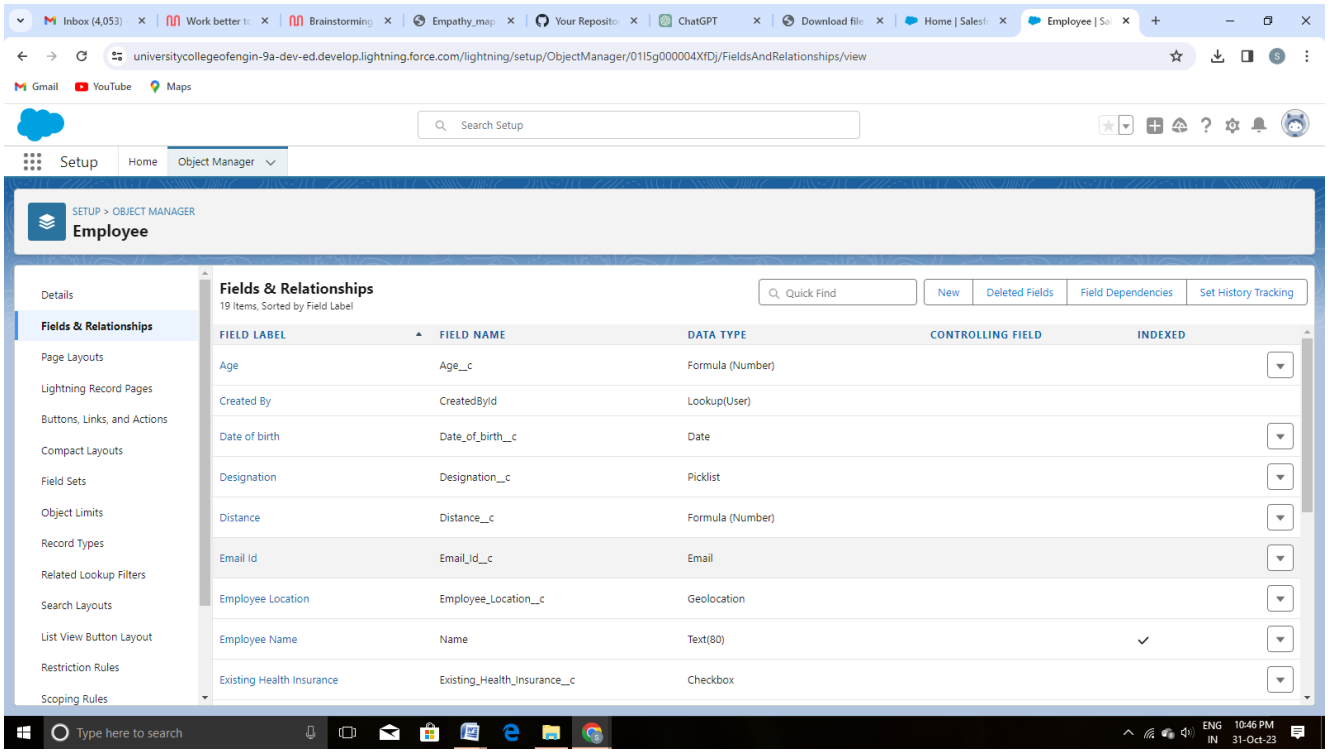
Milestone-04:

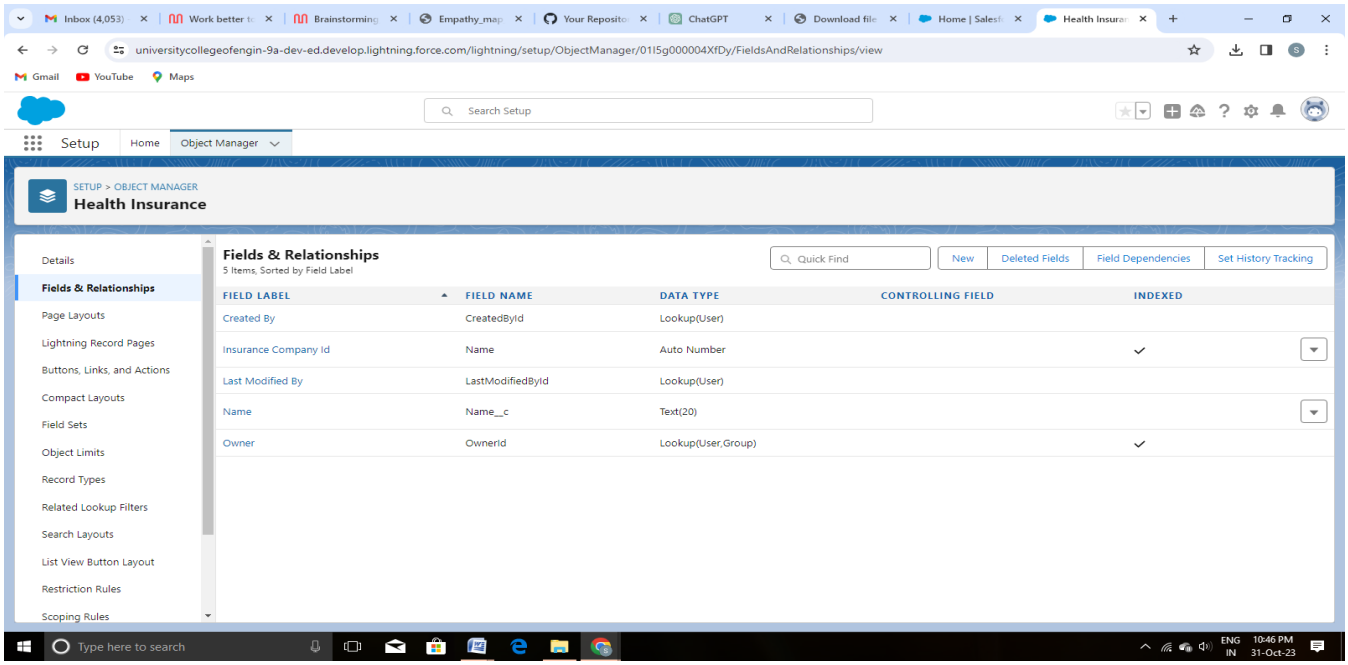
Relationships Between Two Objects

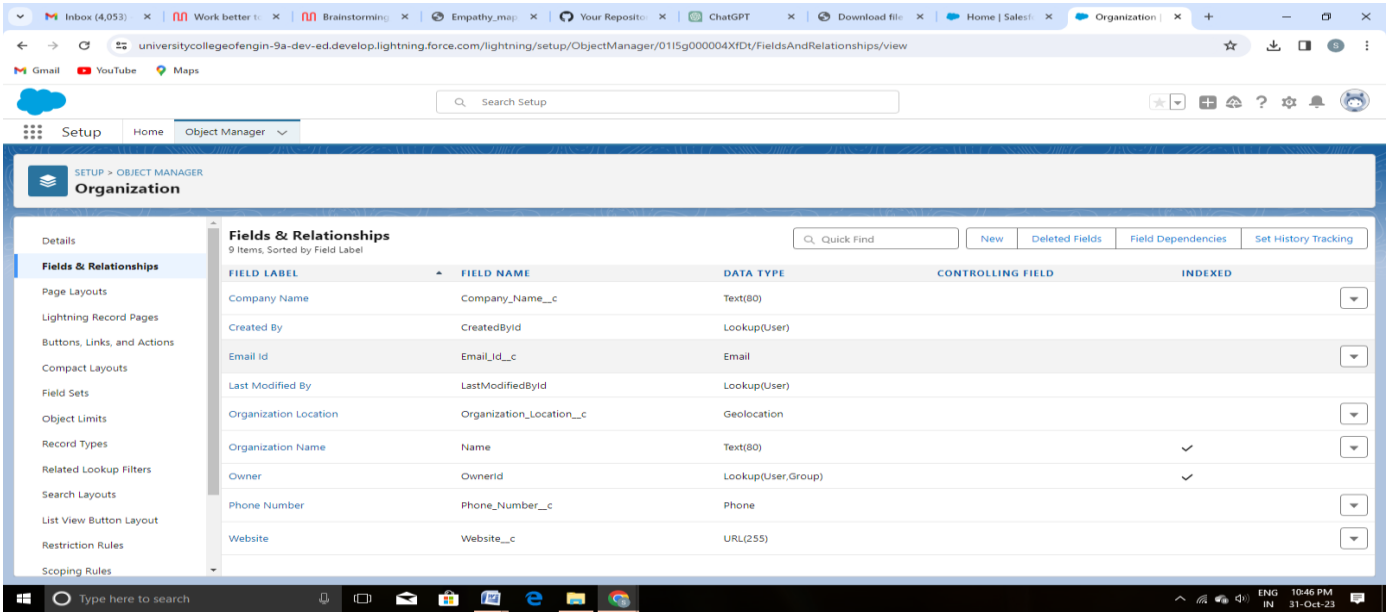
RelationshipCreation

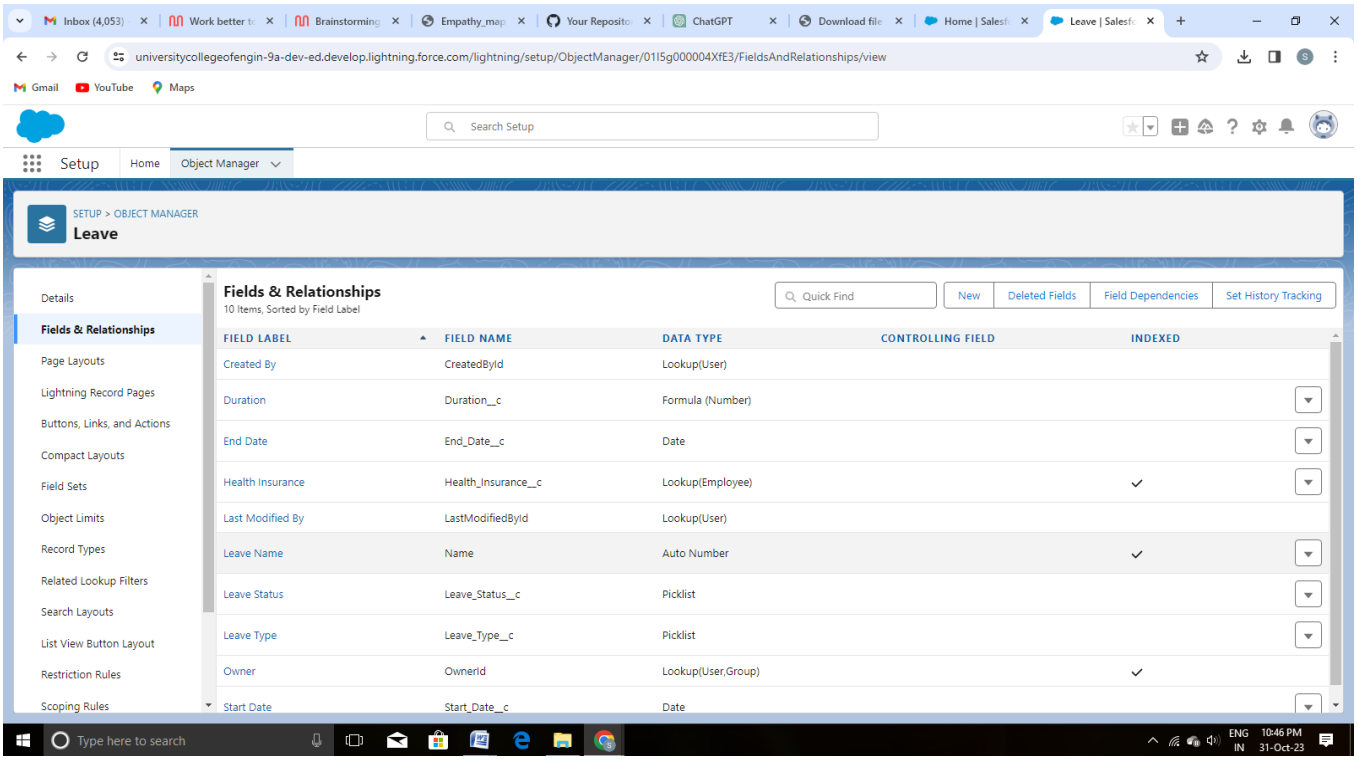
Fields Creation: Employees, Organization, Health Insurance, Leave

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.

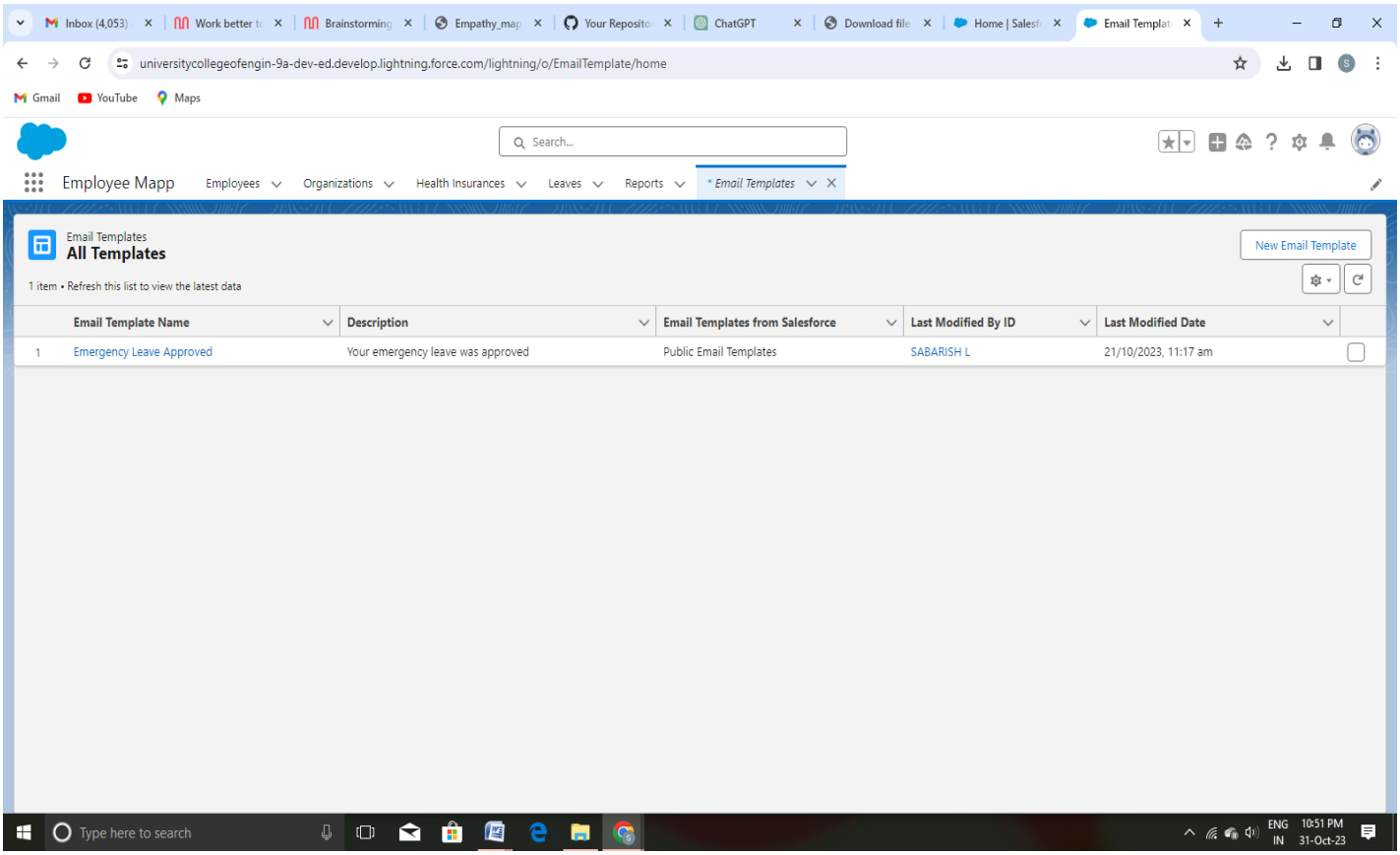

universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000004XfDj/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
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/01I5g000004XfDy/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Health Insurance
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
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

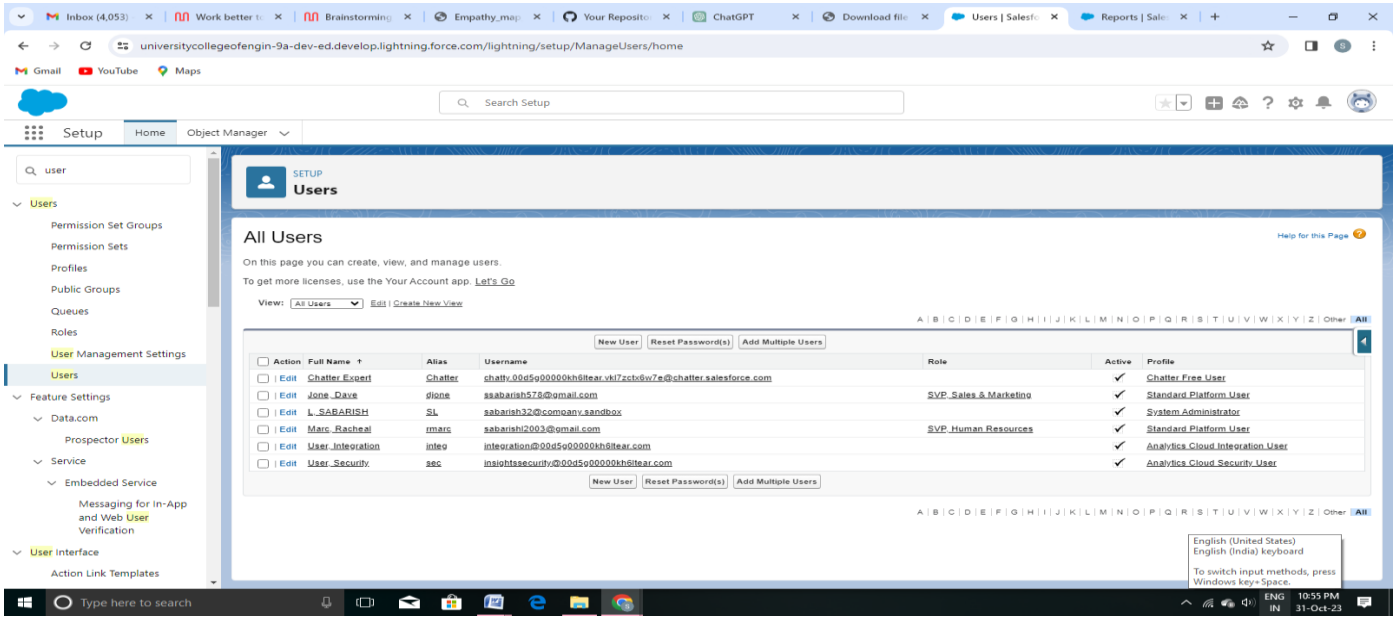

universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000004XfDt/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Organization
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Fields & Relationships
9 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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)
Type here to search
ENG
IN
10:46 PM
31-Oct-23


universitycollegeofengin-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5g000004XfE3/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Leave
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Fields & Relationships
10 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)
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
Type here to search
ENG
IN
10:46 PM
31-Oct-23

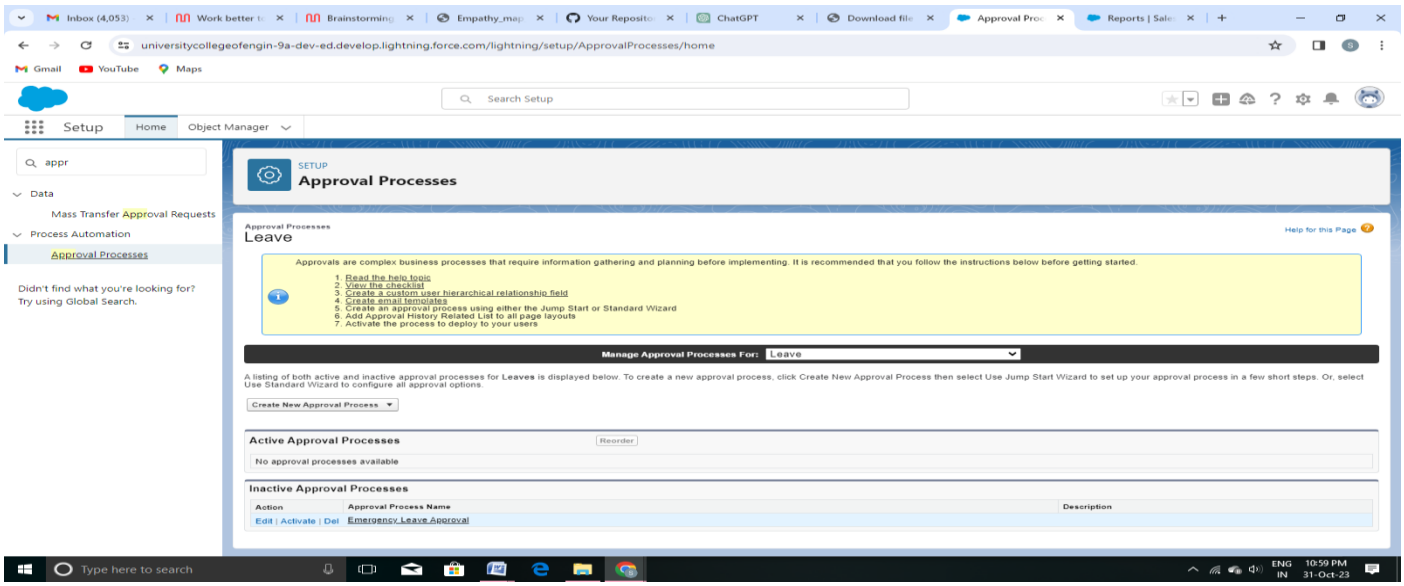
Milestone–05: Email Templates



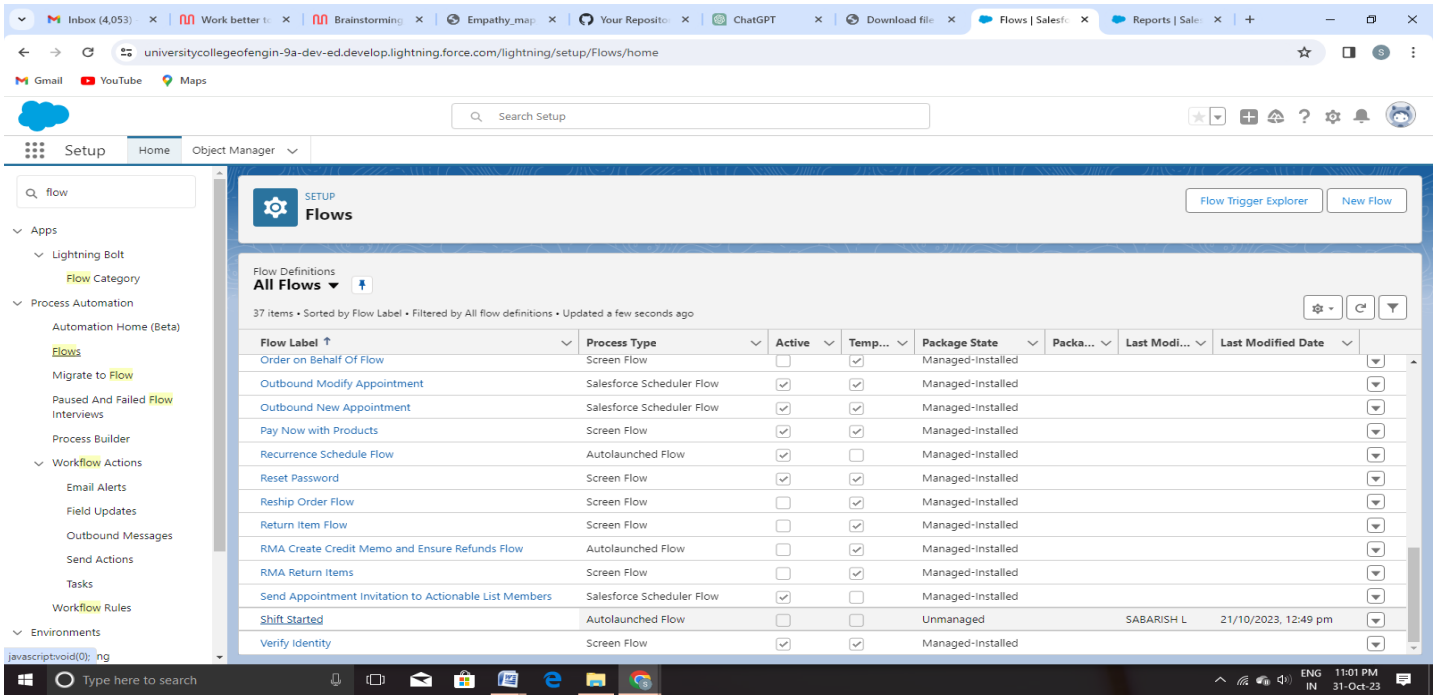
Milestone–06 : Users



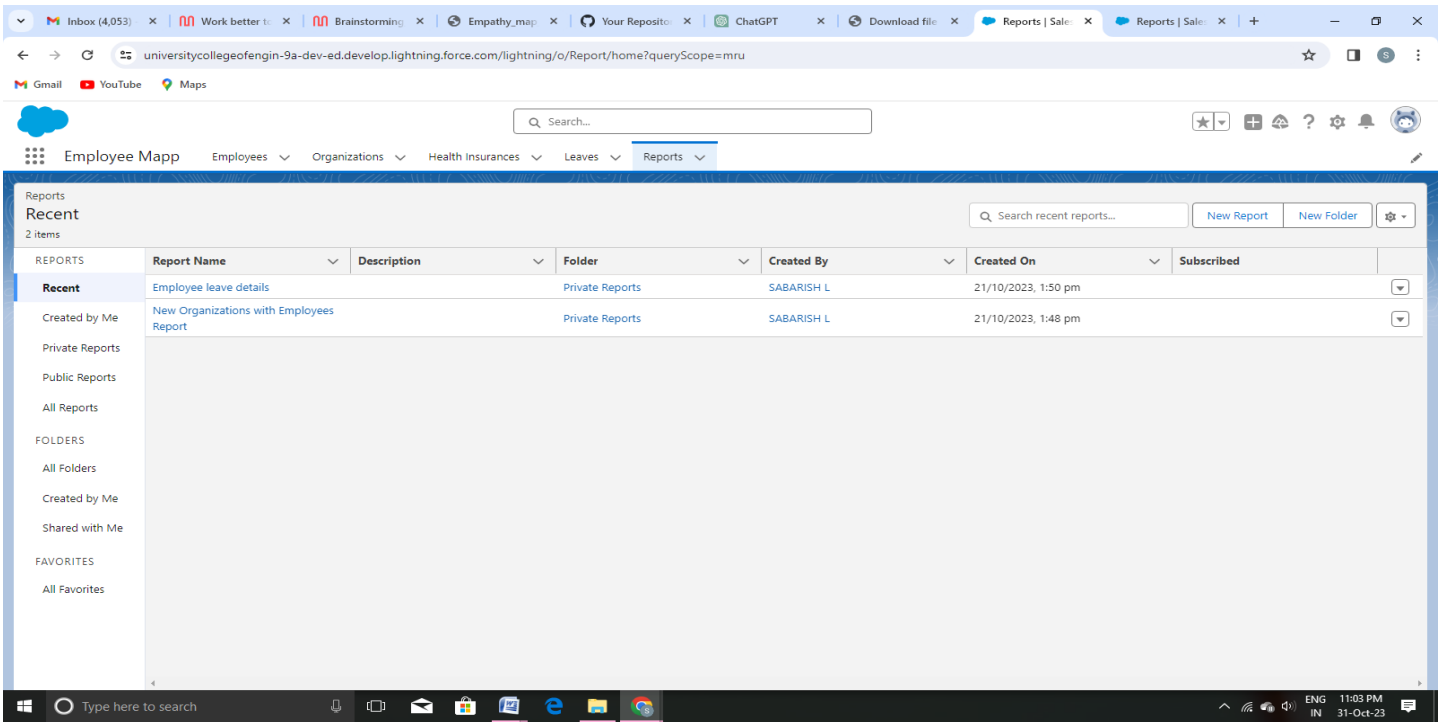
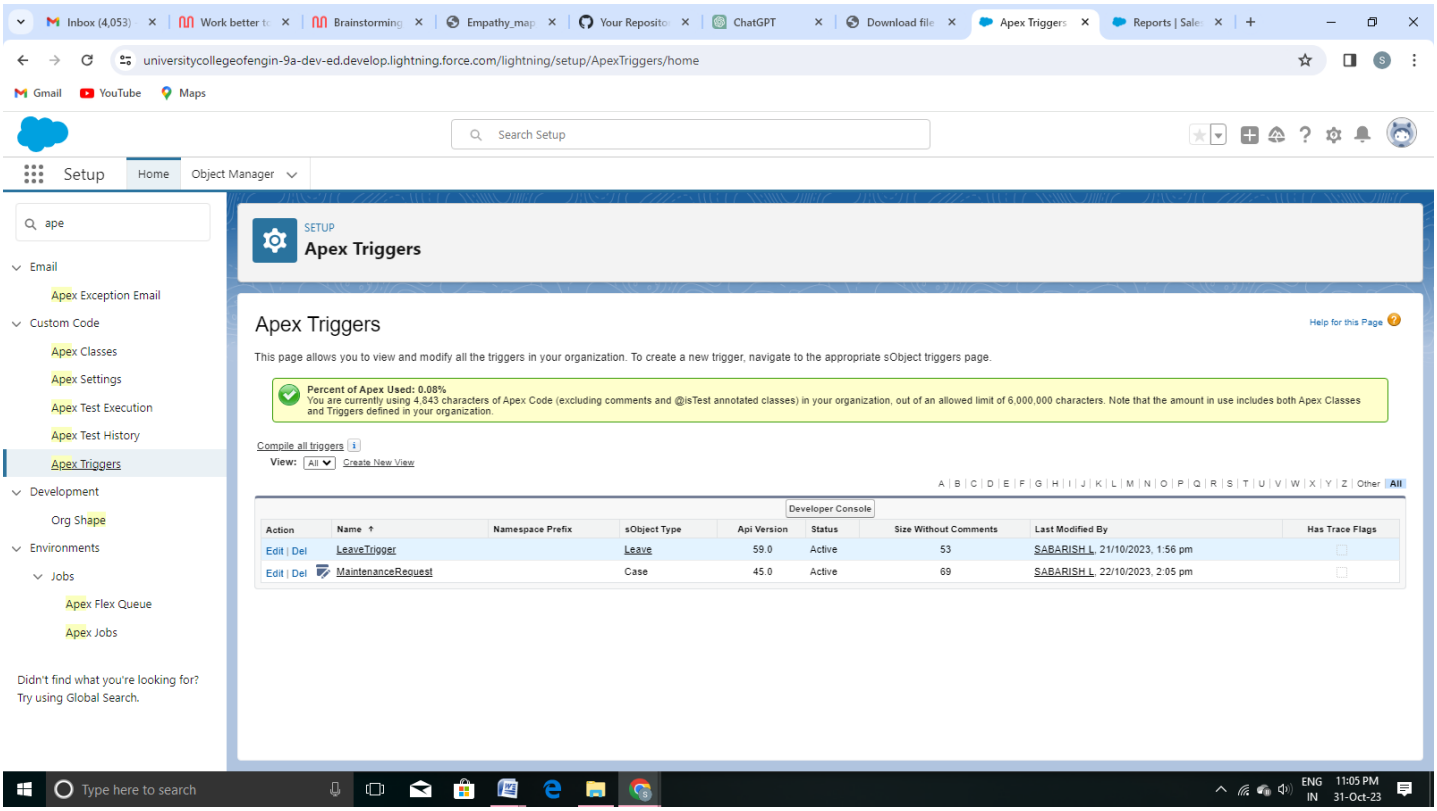
Milestone–07 : Create Approval Process For Emergency Leave



Milestone–08: Flows



Milestone–09 : Reports



Milestone–10 : Apex Triggers