

Streamlined Employee Detail Management

Project Description:

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.

Streamlined Employee Detail Management: This phrase underscores the core objective of the system, which is to simplify and make more efficient the process of managing employee information. It suggests that the traditional, often cumbersome methods of maintaining employee records are being replaced by a more efficient and streamlined approach.

Using CRM: The use of Customer Relationship Management principles and tools indicates that the system takes inspiration from CRM, a well-established approach in managing and nurturing relationships with customers. In this context, CRM principles are adapted to managing relationships within the organization, specifically between the company and its employees.

Comprehensive and Efficient System: This phrase emphasizes that the system is not only thorough in its approach but also highly effective. It implies that it covers all aspects of employee data management while doing so with maximum efficiency.

Manage and Organize Employee Information: The system's primary functions are to manage and organize employee data. Managing implies tasks like updating, editing, and maintaining records, while organizing suggests arranging this information in a structured and accessible manner.

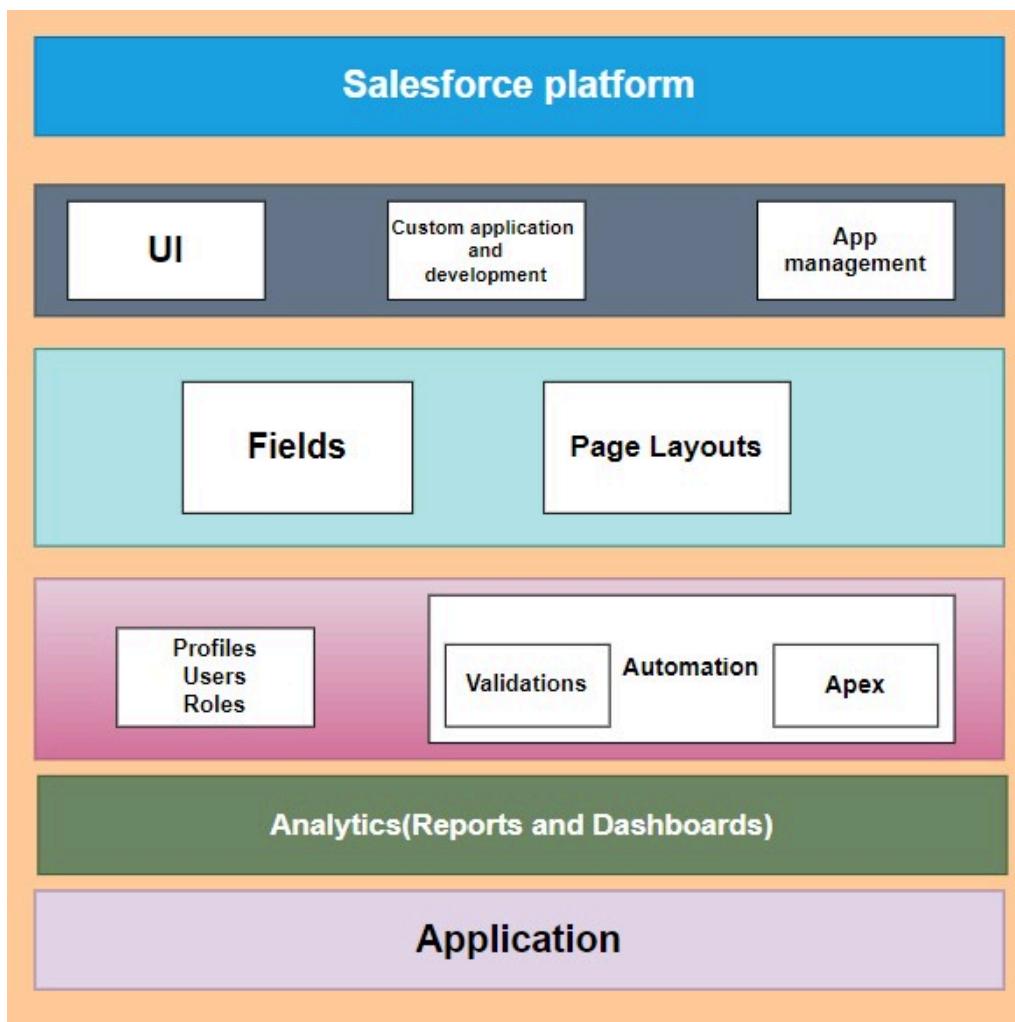
Centralize and Streamline Employee Data: The use of "centralize" suggests that employee data is gathered and stored in one central repository, making it easily accessible. "Streamline" means that the system simplifies and optimizes processes related to employee data, reducing redundancy and inefficiency.

Robust Platform: This indicates that the system is not just a simple software tool but a powerful and capable platform. It can likely handle a wide range of functions and features related to employee data management.

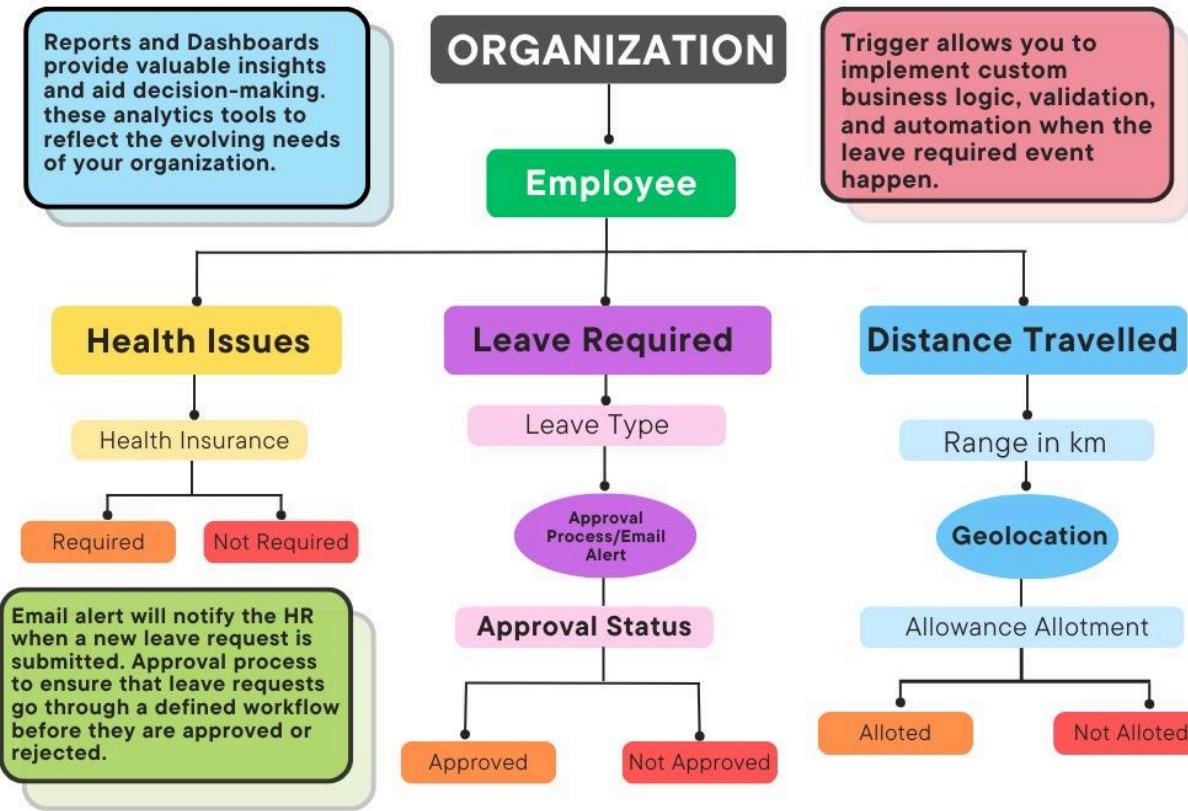
HR Professionals and Managers: The intended users of this system are HR professionals and managers, highlighting that it's designed to meet their specific needs in managing and overseeing employee information.

Various Aspects of Employee Details: The system isn't limited to a single aspect of employee data but covers multiple dimensions of this information. This could include personal details, employment history, performance records, training and development, and more.

Technical Architecture:



Project Flow:



What you'll learn

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce
3. Formula fields and Validation rules.
4. Approval Process.
5. Reports and dashboards
6. Flows.
7. Email alerts and email templates.
8. Apex Class
9. Apex Triggers

Milestone 1-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.

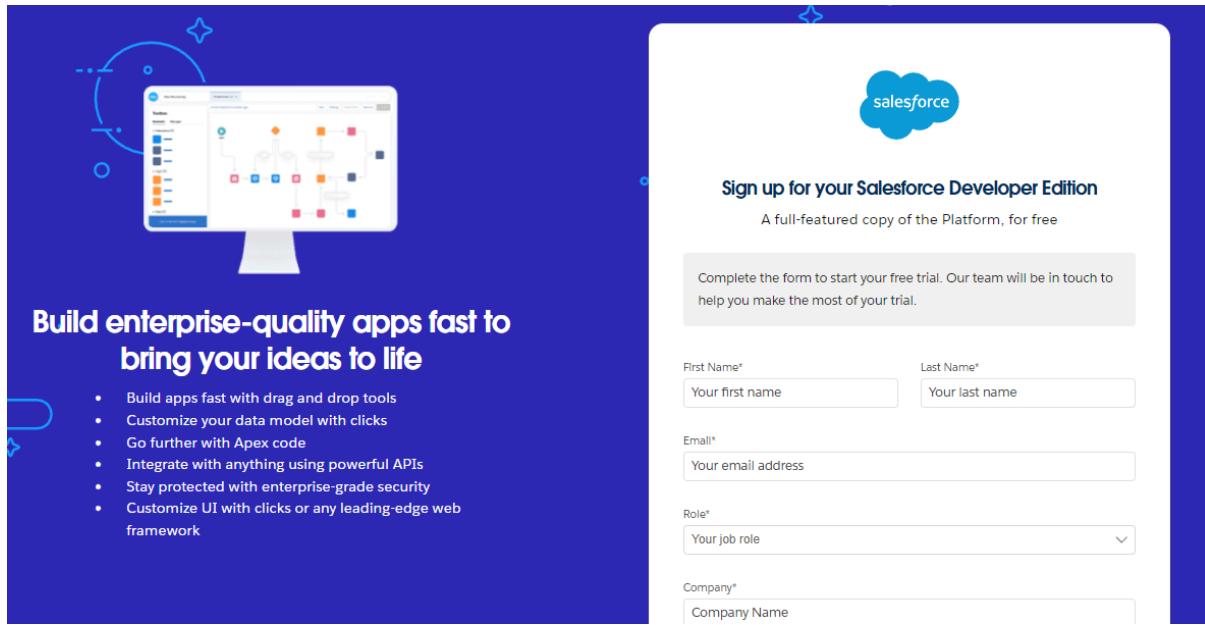
So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

Activity 1: Creating Developer Account:

Creating a developer org in salesforce.

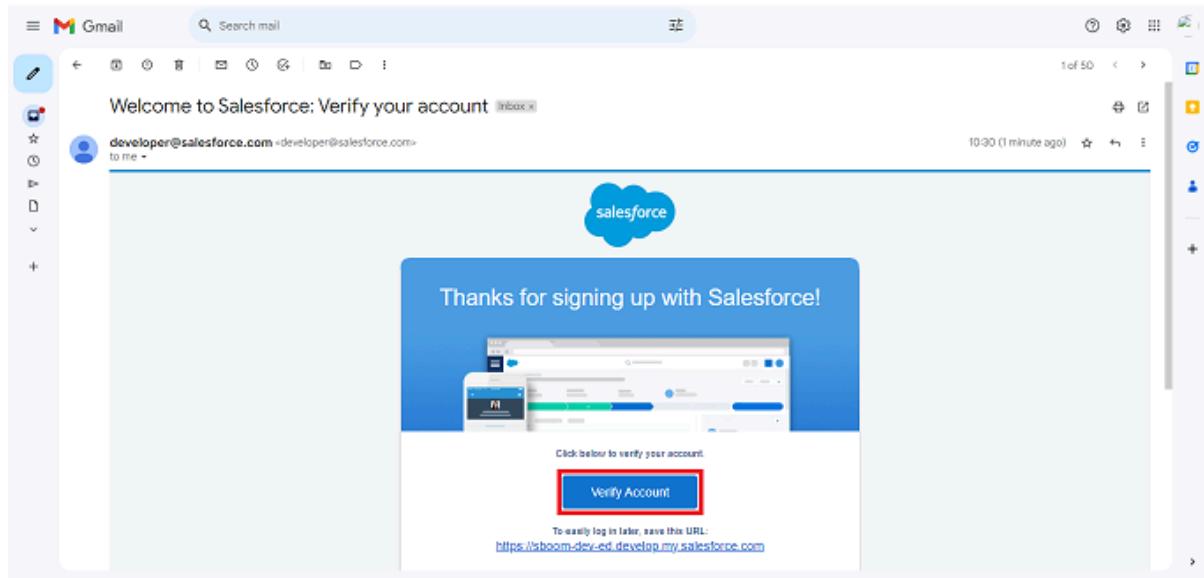
1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :



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.

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.

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

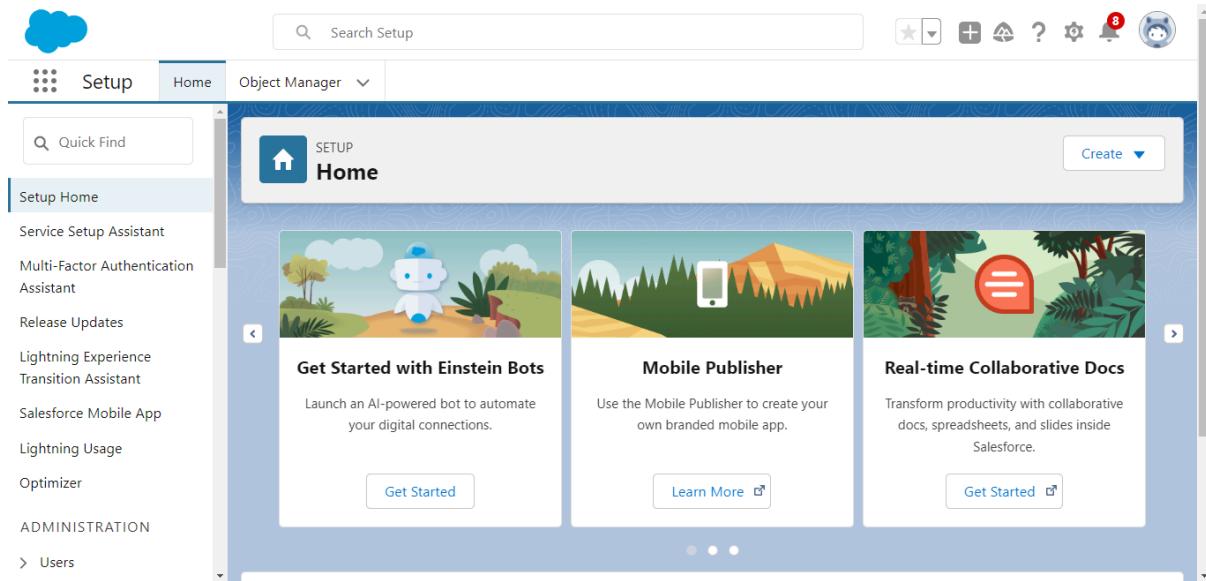
Security Question
In what city were you born?

* Answer
asdfghjkl

Change Password

A screenshot of a "Change Your Password" form. It includes instructions to enter a new password meeting specific criteria (8 characters, 1 letter, 1 number). There are fields for "New Password" and "Confirm New Password", both with placeholder dots and validation status ("Good" and "Match"). Below these are "Security Question" and "Answer" fields, with "In what city were you born?" as the question and "asdfghjkl" as the answer. A large red box highlights the "New Password", "Confirm New Password", "Security Question", and "Answer" fields.

Then you will redirect to your salesforce setup page.



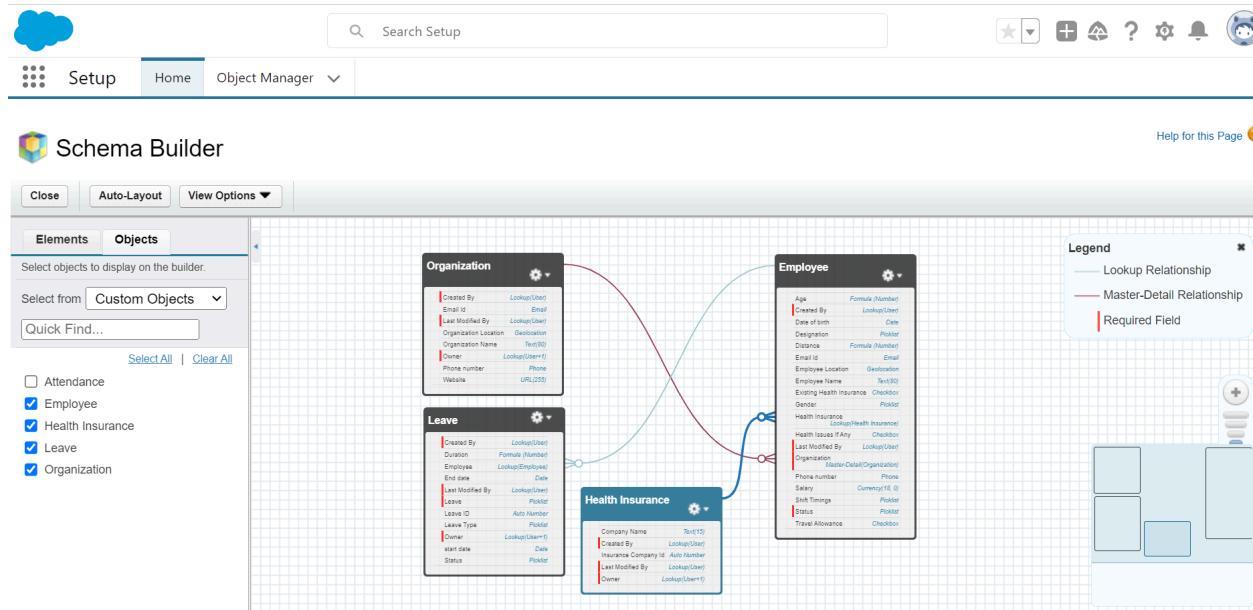
Milestone 2- Object

What Is an Object?

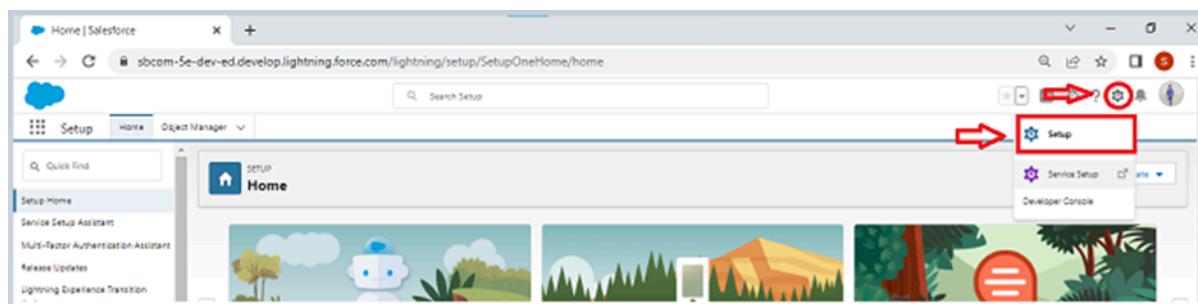
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

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



To Navigate to Setup page:
Click on gear icon → click setup.



To create an object:

- From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup' and 'Home' buttons, followed by a dropdown menu labeled 'Object Manager'. A large black arrow points from the left towards this dropdown. To the right of the dropdown is a 'Create' button, also highlighted with a black box. Below the navigation bar, the 'Object Manager' page is displayed. It has a header with 'SETUP' and 'Object Manager' and a search bar. On the right side of the header, there's a 'Schema Builder' button and another 'Create' button. A circled 'Custom Object' link is visible. The main area shows a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. One row in the table is highlighted with a blue background and labeled 'Custom Object from Spreadsheet'.

- On Custom object defining page:

- Enter the label name, plural label name, click on Allow reports, Allow search.

This screenshot shows the 'New Custom Object' page in the Salesforce Setup. The title bar says 'New Custom Object | Salesforce'. The main form is titled 'Custom Object Definition Edit'. It contains several fields:

- 'Label': A field with a red box around it, containing 'Account' with 'Example: Accounts' below it.
- 'Plural Label': A field with a red box around it, containing 'Accounts' with 'Example: Accounts' below it.
- 'Object Name': A field with a red box around it, containing 'Account' with 'Example: Account' below it.
- 'Description': A large text area with 'Description' above it.
- 'Context Sensitive Help Setting': A section with radio buttons for 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'.
- 'Content Name': A dropdown menu set to 'None'.
- 'Enter Record Name Label and Format': A section about record names with 'Record Name' and 'Example: Account Name'.
- 'Data Type': A dropdown menu set to 'Text'.
- 'Optional Features': A section with checkboxes:
 - Allow Reports (circled with a red circle and a red arrow pointing to it)
 - Allow Activities
 - Track Field History
 - Allow Chatter Groups
 - Enable Licensing

 At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

This screenshot continues from the previous one, showing more of the 'New Custom Object' page:

- 'Optional Features' section: Shows 'Allow Reports' checked (circled with a red circle and a red arrow pointing to it), and other options like 'Allow Activities', 'Track Field History', 'Allow Chatter Groups', and 'Enable Licensing'.
- 'Object Classification' section: Shows checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'.
- 'Deployment Status' section: Shows 'Deployed' selected.
- 'Search Status' section: Shows 'Allow Search' checked (circled with a red circle and a red arrow pointing to it).
- 'Object Creation Options' section: Shows checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'.

 At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

- Click on Save.

Activity 1: 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
 - Data Type → Text
5. Click on Allow reports and Track Field History and Allow Activities.
6. Allow search → **Save.**

Activity 2: 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.**

Activity 3: Create Health Insurance 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→ 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.**

Activity 4: Create Leave 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 → Leave
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.**

Milestone 3- Tabs

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

Types of Tabs:

1. Custom Tabs

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

2. Web Tabs

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

3. Visualforce Tabs

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

4. Lightning Component Tabs

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

5. Lightning Page Tabs

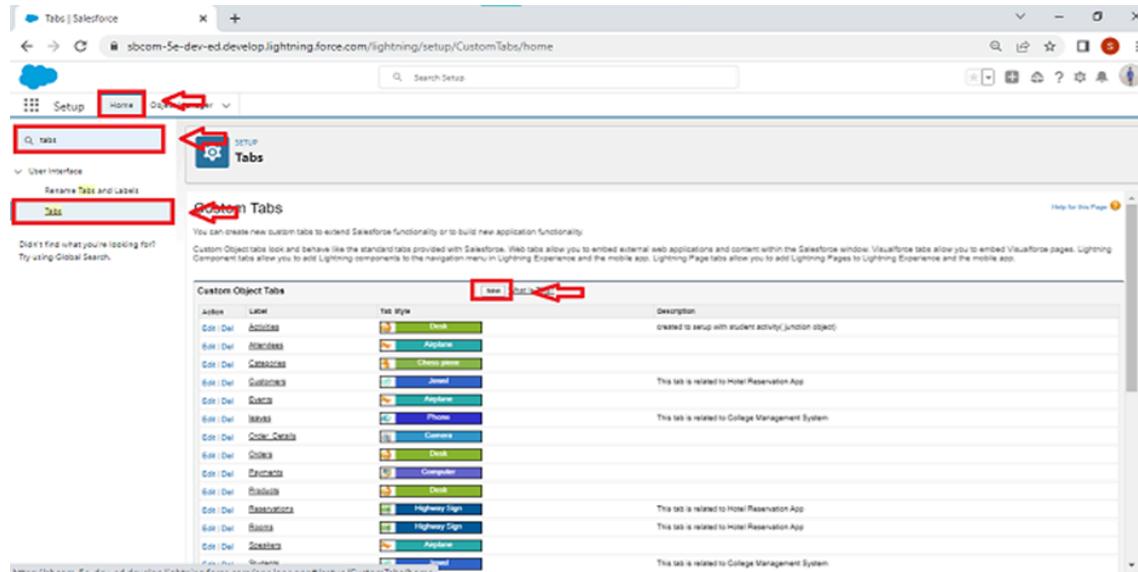
Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu. Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your

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

Activity 1: 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)



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.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and links for 'User Interface', 'Rename Tabs and Labels', and 'Tabs'. The main content area has a 'SETUP' header and a 'Tabs' section. Below it is a 'Custom Tabs' section with a sub-section for 'Custom Object Tabs'. This section lists three tabs: 'Employees' (People tab style), 'Health Insurances' (Pencil tab style), and 'Organizations' (Building tab style). There are 'New' and 'What Is This?' buttons at the top of this list. Below this is a 'Web Tabs' section which is currently empty.

Activity 2: Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “Employee, Organization, Health Insurances, Leave”.
2. Follow the same steps as mentioned in Activity -1 .

Milestone 4- 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.

Activity 1: 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.

App Manager | Salesforce

sbcom-5e-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home

Setup Home Object Manager

Search Setup

App manager

Clone Apps(Beta)

New Lightning App New Connected App

Did you find what you're looking for? Try using Global Search.

Enable App Cloning: Enabled

35 Items > Sorted by App Name > Filtered by All appmenutems - Today's Type

| App Name | Developer Name | Description | Last Modified | App Type | VL |
|---------------------------------|----------------------|---|----------------------|---------------------|----|
| 1 All Tabs | AllTabs | Build CRM Analytics dashboards and apps | 04/12/2022, 10:13 am | Classic | |
| 2 Analytics Studio | Insights | Build CRM Analytics dashboards and apps | 04/12/2022, 10:13 am | Classic | |
| 3 App Launcher | AppLauncher | App Launcher tabs | 04/12/2022, 10:13 am | Classic | |
| 4 Best Solutions | LightningBest | Discover and manage business solutions designed for your industry | 04/12/2022, 10:18 am | Lightning | |
| 5 Chatter Desktop | ChatterDesktop | Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected... | 28/12/2022, 4:04 pm | Connected (Managed) | |
| 6 Chatter Mobile for BlackBerry | ChatterForBlackBerry | The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view fe... | 28/12/2022, 4:05 pm | Connected (Managed) | |
| 7 College Management System | Nilearn | demo app | 08/12/2022, 4:18 pm | Lightning | |
| 8 Community | Community | Salesforce CRM Communities | 04/12/2022, 10:13 am | Classic | |
| 9 Content | Content | Salesforce CRM Content | 04/12/2022, 10:13 am | Classic | |
| 10 Data Manager | DataManager | Use Data Manager to view limits, monitor usage, and manage records. | 04/12/2022, 10:13 am | Lightning | |

- 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:

New Lightning App

Navigation Items

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

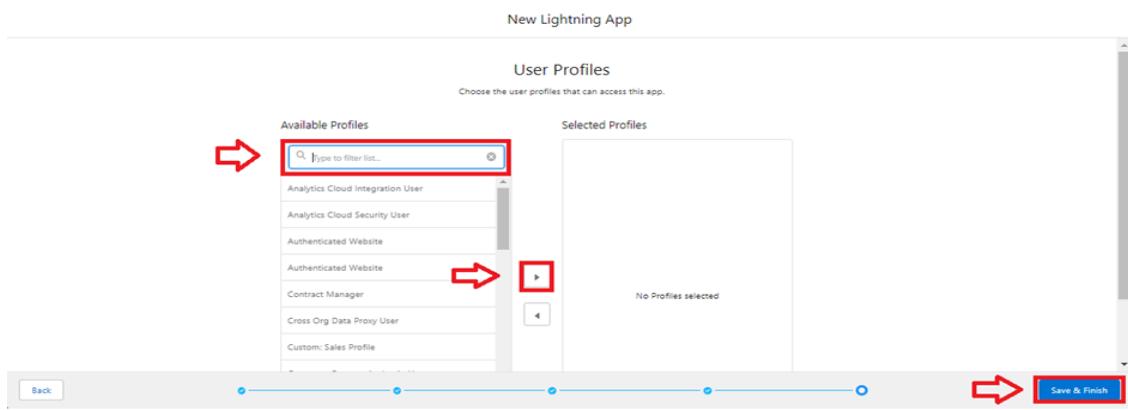
| Available Items | Selected Items |
|-----------------------------|----------------|
| Accounts | |
| Activities | |
| Alert Settings | |
| All Sites | |
| Alternative Payment Methods | |
| App Launcher | |
| Appointment Invitations | |

Type to filter list...

Back Next

Select the items (Employee, Organization, Health Insurances, Leave) from the search bar and move it using the arrow button → Next.

4. To Add User Profiles:



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

Milestone 5 : 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

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.

Activity 1 : Creating Junction Object :

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.

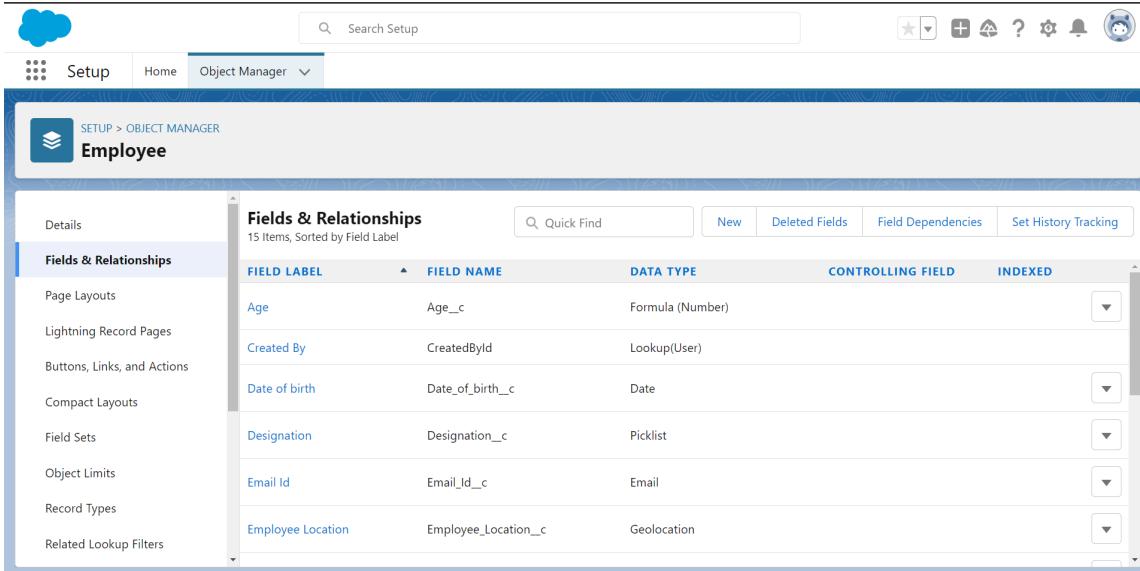
Creating junction object as Employee details with Organization & Health Insurance

To create junction object

Activity 2 : 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.



The screenshot shows the Salesforce Object Manager interface for the Employee object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and displays a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Age (Age__c, Formula Number), Created By (CreatedBy, Lookup User), Date of birth (Date_of_birth__c, Date), Designation (Designation__c, Picklist), Email Id (Email_Id__c, Email), and Employee Location (Employee_Location__c, Geolocation).

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|-------------------|----------------------|------------------|-------------------|---------|
| Age | Age__c | Formula (Number) | | |
| Created By | CreatedBy | Lookup(User) | | |
| Date of birth | Date_of_birth__c | Date | | |
| Designation | Designation__c | Picklist | | |
| Email Id | Email_Id__c | Email | | |
| Employee Location | Employee_Location__c | Geolocation | | |

2. Click on fields & relationship → click on New.

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

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Next Cancel

3. Select “Master-Detail relationship” as data type and click Next.

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

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

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- You can create rollup summary fields on the master record to summarize the detail records.

 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Next Cancel

5. Next → Next → Save & New.

Activity 3 : Creating Lookup Relationship

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.

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master")

4. Related to Health Insurance.

Employee New Relationship

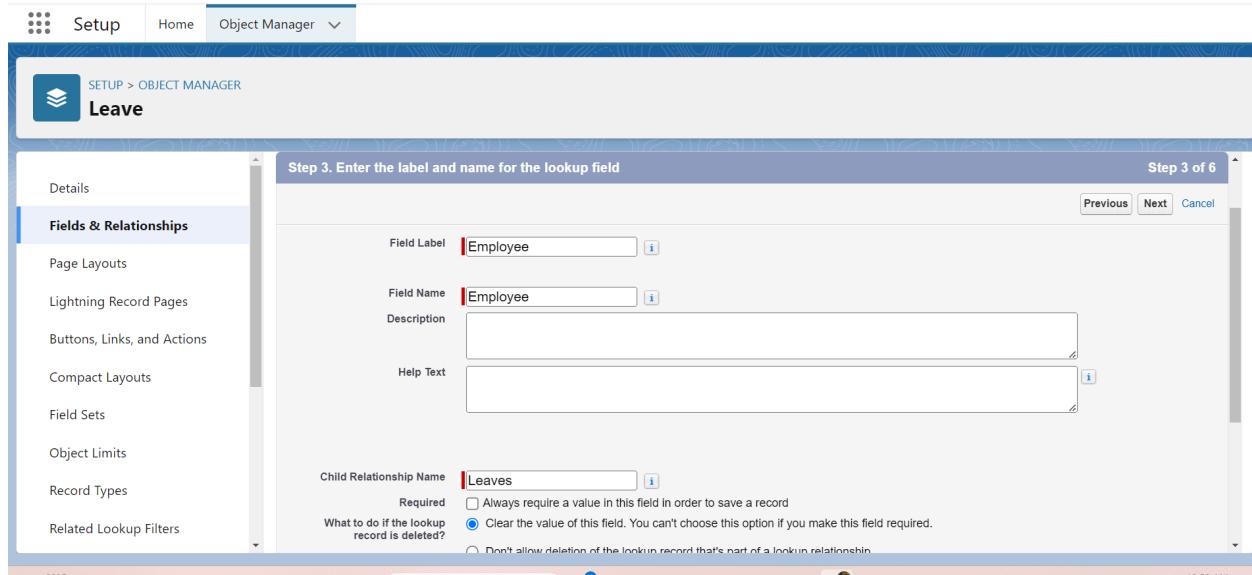
Step 2. Choose the related object

Select the other object to which this relationship connects.

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



Activity 4 : Creating Text 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.

The screenshot shows the Salesforce Setup interface for creating a new field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Employee'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), 'Page Layouts', etc. The right pane displays a list of field types with their descriptions. The 'Text' type is selected. At the bottom right are 'Next' and 'Cancel' buttons.

| Field Type | Description |
|-----------------------------------|---|
| Number | Allows users to enter any number. Leading zeros are removed. |
| Percent | Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number. |
| Phone | Allows users to enter any phone number. Automatically formats it as a phone number. |
| 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. |
| Text Area (Rich) | Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines. |
| Text (Encrypted) <small>i</small> | Allows users to enter any combination of letters and numbers and store them in encrypted form. |
| Time | Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field. |
| URL | Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window. |

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.

The screenshot shows the details of the newly created 'Employee Name' field. The top navigation bar and sidebar are identical to the previous screenshot. The main title is 'Employee Field Employee Name'. The right pane displays the field's information, including its label ('Employee Name'), data type ('Text(80)'), and validation rules ('No validation rules defined').

| Field Label | Employee Name | Field Name | Name |
|---------------------------|---------------|------------|------|
| Data Type | Text(80) | | |
| Description | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |

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:
 - Field Label: Company Name
 - Length : 80
 - Field Name : gets auto generated
 - Click on Next → Next → Save and new.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with icons for Home, Object Manager, and other setup options. Below it, a breadcrumb trail reads "SETUP > OBJECT MANAGER Organization". On the left, a sidebar lists various setup categories like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled "Organization Field Organization Name" and shows the "Back to Organization" link. It has tabs for "Field Information" and "Validation Rules". Under "Field Information", there's a table with columns for Field Label, Data Type, Description, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. The "Field Label" is set to "Organization Name", "Data Type" is "Text(80)", and "Description" is blank. Under "Validation Rules", it says "No validation rules defined." There are also "Set Field-Level Security" and "View Field Accessibility" buttons at the top of the main content area.

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.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, a search bar labeled 'Search Setup', and various setup icons. The main area shows the 'Object Manager' section under 'SETUP > OBJECT MANAGER'. A specific object, 'Health Insurance', is selected. On the left, a sidebar lists 'Fields & Relationships' and other setup categories like Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions. The main content area is titled 'Edit Health Insurance Custom Field Company Name'. It displays a 'Custom Field Definition Edit' form with the following details:

| Field Label | Company Name | Data Type | Text |
|------------------------|--------------|-----------|------|
| Field Name | Company_Name | | |
| Description | (empty) | | |
| Help Text | (empty) | | |
| Data Owner | User | | |
| Field Usage | --None-- | | |
| Data Sensitivity Level | --None-- | | |

A note at the bottom right indicates 'I = Required Information'.

Activity 5 : 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.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, a search bar labeled 'Search Setup', and various setup icons. The main area shows the 'Object Manager' section under 'SETUP > OBJECT MANAGER'. A specific object, 'Employee', is selected. On the left, a sidebar lists 'Fields & Relationships' and other setup categories like Page Layouts, Lightning Record Pages, and Buttons, Links, and Actions. The main content area is titled 'Edit Employee Custom Field Phone number'. It displays a 'Custom Field Definition Edit' form with the following details:

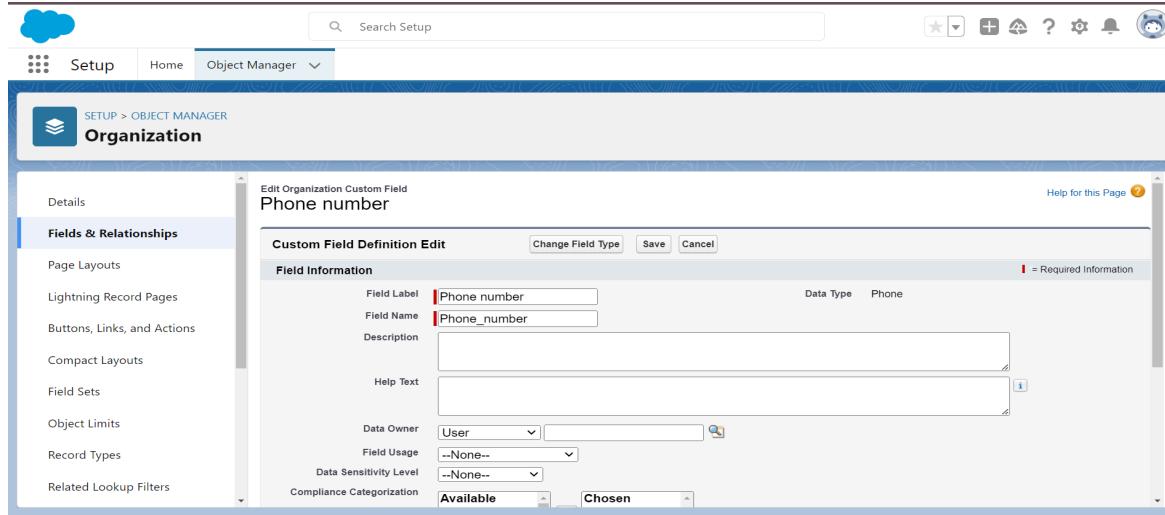
| Field Label | Phone number | Data Type | Phone |
|---------------------------|--------------|-----------|-------|
| Field Name | Phone_number | | |
| Description | (empty) | | |
| Help Text | (empty) | | |
| Data Owner | User | | |
| Field Usage | --None-- | | |
| Data Sensitivity Level | --None-- | | |
| Compliance Categorization | Available | Chosen | |

A note at the bottom right indicates 'I = Required Information'.

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 “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.



Activity 6 : Creating the 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.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area is titled 'Employee' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc. The central panel is titled 'Edit Employee Custom Field Email Id' and contains a 'Custom Field Definition Edit' form. The 'Field Information' section shows 'Field Label' as 'Email Id', 'Field Name' as 'Email_Id', 'Data Type' as 'Email', and 'Data Owner' as 'User'. Other settings include 'Field Usage' (None), 'Data Sensitivity Level' (None), and 'Compliance Categorization' (Available, Chosen). A 'Save' button is visible at the bottom.

To create fields in an object:

Organization

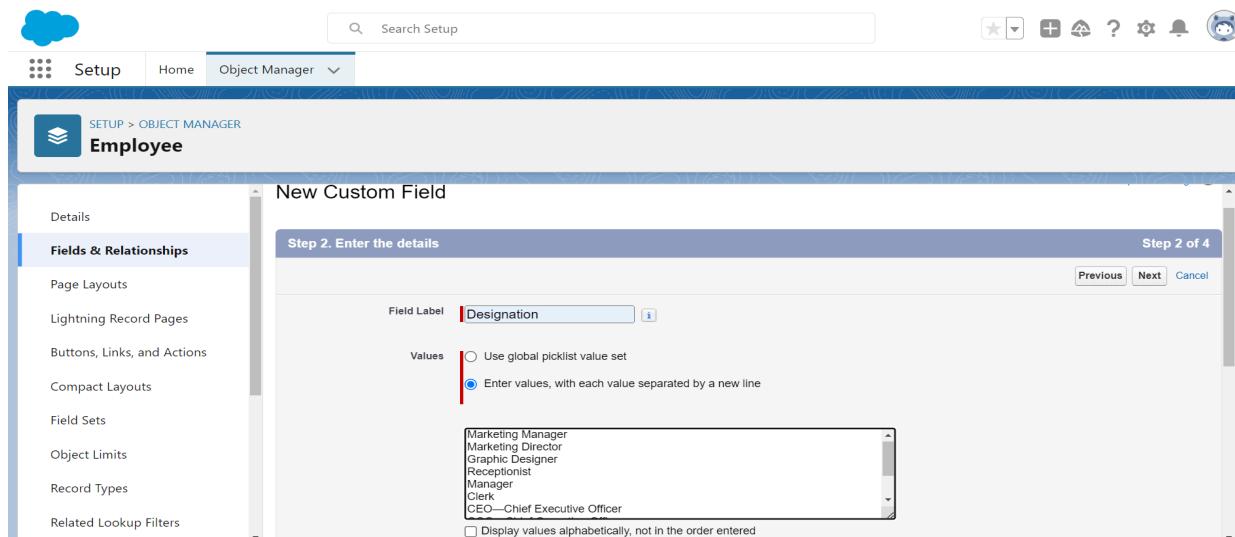
6. Go to setup → click on Object Manager → type object name(Organization) in quick find bar→ click on the object.
7. Now click on “Fields & Relationships” → New
8. Select Data type as “Email” and click Next.
9. Given the Field Label as “ Email Id”.
10. Field Name will be auto populated, and click on Next→ Next → Save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area is titled 'Organization' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc. The central panel is titled 'Edit Organization Custom Field Email Id' and contains a 'Custom Field Definition Edit' form. The 'Field Information' section shows 'Field Label' as 'Email Id', 'Field Name' as 'Email_Id', 'Data Type' as 'Email', and 'Data Owner' as 'User'. Other settings include 'Field Usage' (None), 'Data Sensitivity Level' (None), and 'Compliance Categorization' (Available, Chosen). A 'Save' button is visible at the bottom.

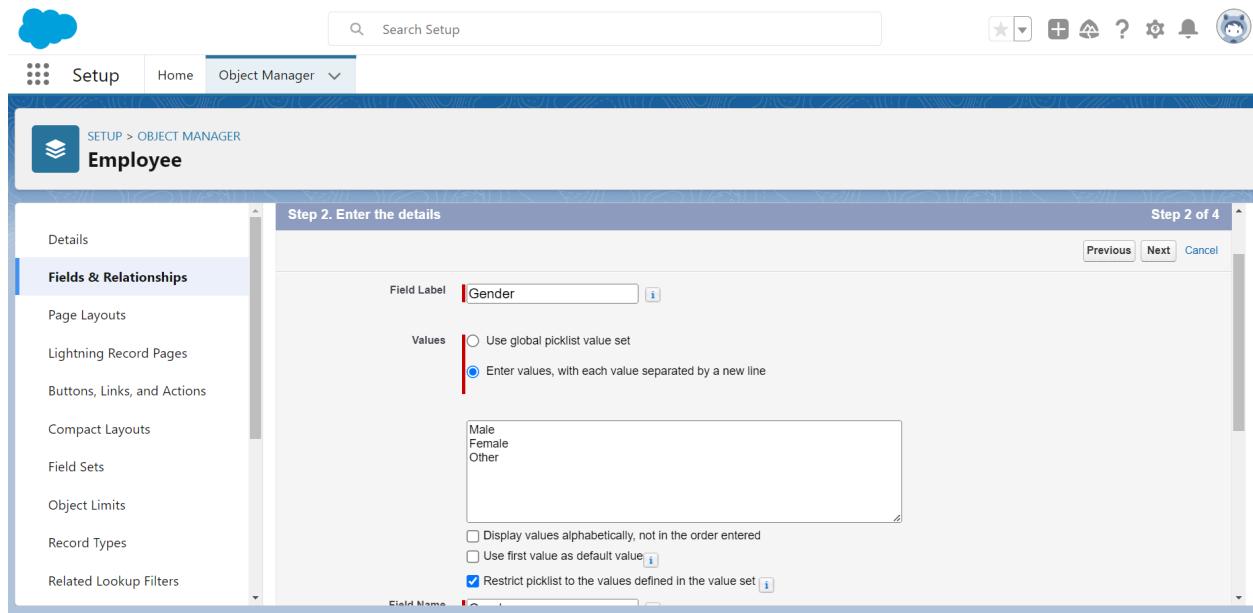
Activity 7 : Creating Picklist Field in Employee

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 “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

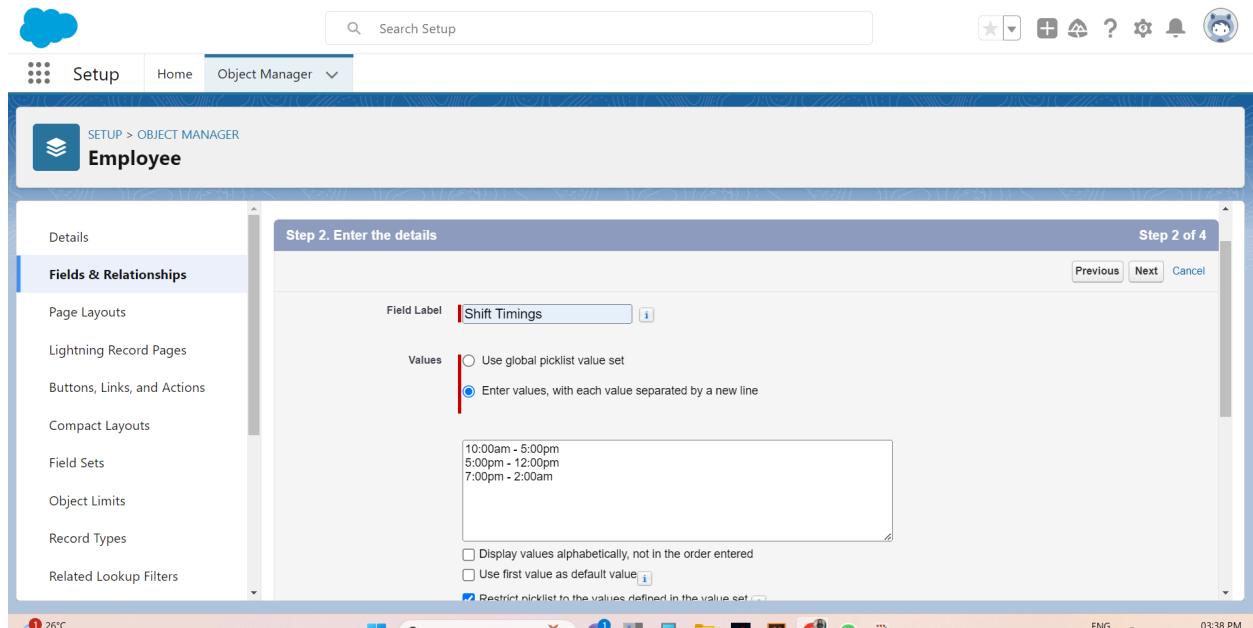


5. Click Next→ Next → Next → Save .
6. Go to setup → click on Object Manager → type object name(Employee) in quick find bar→ click on the object.
7. Now click on “Fields & Relationships” → New
8. Select Data type as “Picklist” and click Next.
9. Enter Field Label as “Gender”, under values select “Enter values, with each value separated by a new line” and enter values as shown below.



10. Click Next → Next → Next → Save .

11. Go to setup → click on Object Manager → type object name(Employee) in quick find bar→ click on the object.
12. Now click on “Fields & Relationships” → New.
13. Select Data type as “Picklist” and click Next.
14. 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.



15. 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.
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 .

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

- Setup Bar:** Includes icons for Home, Object Manager, and various system settings.
- Search Bar:** Shows "Search Setup".
- Header:** "SETUP > OBJECT MANAGER" and "Leave".
- Left Sidebar:** Navigation links including Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters.
- Right Content Area:** A list of field types with descriptions:
 - Date/Time: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
 - Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
 - Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
 - Number: Allows users to enter any number. Leading zeros are removed.
 - Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
 - Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
 - Picklist** (selected): 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.
 - Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
 - Text (Encrypted): Allows users to enter any combination of letters and numbers and store them in encrypted form.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, 'Setup' (selected), 'Home', and 'Object Manager'. A search bar says 'Search Setup' and various global buttons are on the right. The main area is titled 'Leave New Custom Field' under 'Step 2. Enter the details'. The 'Field Label' is set to 'Leave Type'. Under 'Values', the radio button 'Enter values, with each value separated by a new line' is selected. A text input field contains the following values:
Bereavement leave
Medical Leave
Paid Leave
Maternity Leave
Half Day Leave
One Day Leave
Casual Leave

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.
2. Now click on “Fields & Relationships” → New
3. Select Data type as “Picklist” and click Next.
4. 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

5. Click Next→ Next → Next → Save .

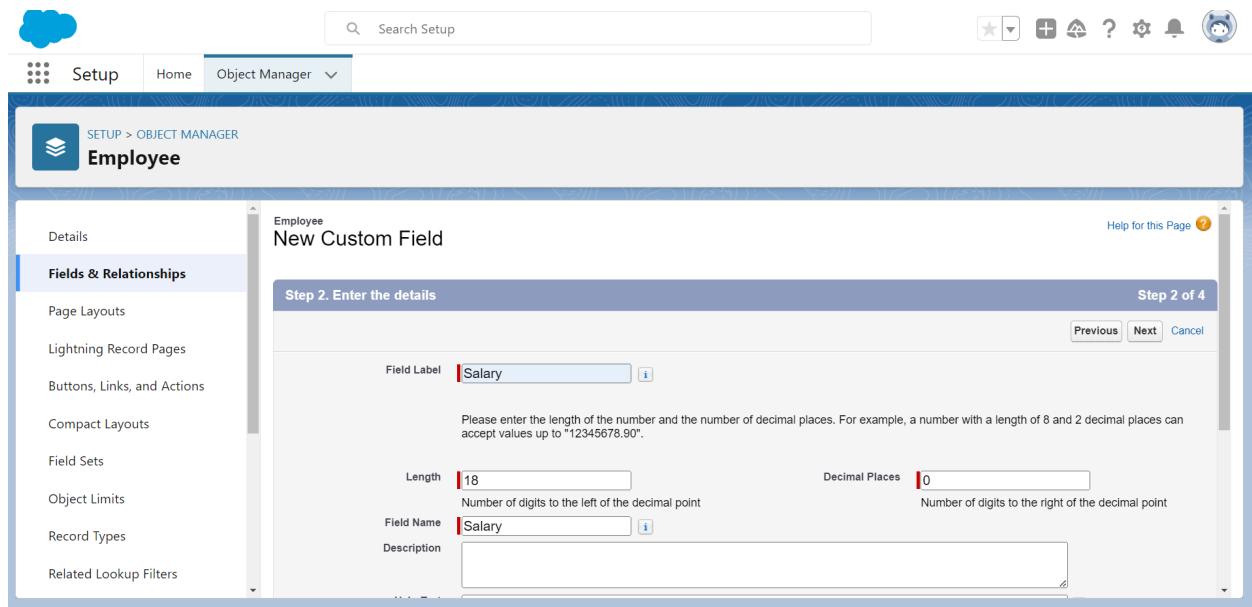
The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, 'Setup' (selected), 'Home', and 'Object Manager'. A search bar says 'Search Setup' and various global buttons are on the right. The main area is titled 'Leave New Custom Field' under 'Step 2. Enter the details'. The 'Field Label' is set to 'Leave Status'. Under 'Values', the radio button 'Enter values, with each value separated by a new line' is selected. A text input field contains the following values:
On leave
Not on Leave

Activity 8 : 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 .



Activity 9 : 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 .

Employee

Fields & Relationships

- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email

New Custom Field

Step 2. Enter the details

Field Label: Date of birth

Field Name: Date_of_birth

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Auto add to custom report: Add this field to existing custom report types that contain this entity

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.
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 .

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

- Header:** Search Setup, Home, Object Manager
- Left sidebar (Leave object details):**
 - Details
 - Fields & Relationships** (selected)
 - Page Layouts
 - Lightning Record Pages
 - Buttons, Links, and Actions
 - Compact Layouts
 - Field Sets
 - Object Limits
 - Record Types
 - Related Lookup Filters
- Central pane (Step 2. Enter the details):**
 - Field Label:** start date
 - Field Name:** start_date
 - Description:** (empty)
 - Help Text:** (empty)
 - Required:** Always require a value in this field in order to save a record
 - Auto add to custom report type:** Add this field to existing custom report types that contain this entity
 - Default Value:** Show Formula Editor
- Top right:** Step 2 of 4, Previous, Next, Cancel

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 “ End Date”. Field name will be auto generated.
5. Click Next→ Next → Next → Save .

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

- Header:** Search Setup, Home, Object Manager
- Left sidebar (Leave object details):**
 - Details
 - Fields & Relationships** (selected)
 - Page Layouts
 - Lightning Record Pages
 - Buttons, Links, and Actions
 - Compact Layouts
 - Field Sets
 - Object Limits
 - Record Types
 - Related Lookup Filters
- Central pane (Step 2. Enter the details):**
 - Field Label:** End date
 - Field Name:** End_date
 - Description:** (empty)
 - Help Text:** (empty)
 - Required:** Always require a value in this field in order to save a record
 - Auto add to custom report type:** Add this field to existing custom report types that contain this entity
 - Default Value:** Show Formula Editor
- Top right:** Step 2 of 4, Previous, Next, Cancel

Activity 10 : 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 .

The image consists of two screenshots of the Salesforce Setup interface, illustrating the steps to create a new URL field for the Organization object.

Screenshot 1: Fields & Relationships Selection

This screenshot shows the "Fields & Relationships" section of the Object Manager for the "Organization" object. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a list of field types with their descriptions:

- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- 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.
- Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- Text (Encrypted): Allows users to enter any combination of letters and numbers and store them in encrypted form.
- Time: Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50 600" are all valid times for this field.
- URL: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

A radio button next to "URL" is selected. At the bottom right of the main area, there are "Next" and "Cancel" buttons.

Screenshot 2: Step 2 of 4 - Enter the details

This screenshot shows the second step of a four-step wizard titled "New Custom Field". The title bar says "Organization" and "New Custom Field". The top right has a "Help for this Page" link. The main area is titled "Step 2. Enter the details" and "Step 2 of 4". It contains the following fields:

| | |
|-------------|-------------------|
| Field Label | Website |
| Field Name | Website |
| Description | (empty text area) |
| Help Text | (empty text area) |

Below the fields are two checkboxes: "Required" (unchecked) and "Always require a value in this field in order to save a record" (unchecked). There are also "Previous", "Next", and "Cancel" buttons at the bottom right.

Activity 11 : 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 .

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

External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox

Allows users to select a True (checked) or False (unchecked) value.

Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date

Allows users to enter a date or pick a date from a popup calendar.

Date/Time

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Email

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Number

Allows users to enter any number. Leading zeros are removed.

Percent

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

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.

SETUP > OBJECT MANAGER
Employee

New Custom Field

Step 2 of 4

Previous Next Cancel

Field Label

Default Value Checked Unchecked

Field Name

Description

Help Text

SETUP > OBJECT MANAGER
Employee

New Custom Field

Step 2 of 4

Previous Next Cancel

Field Label

Default Value Checked Unchecked

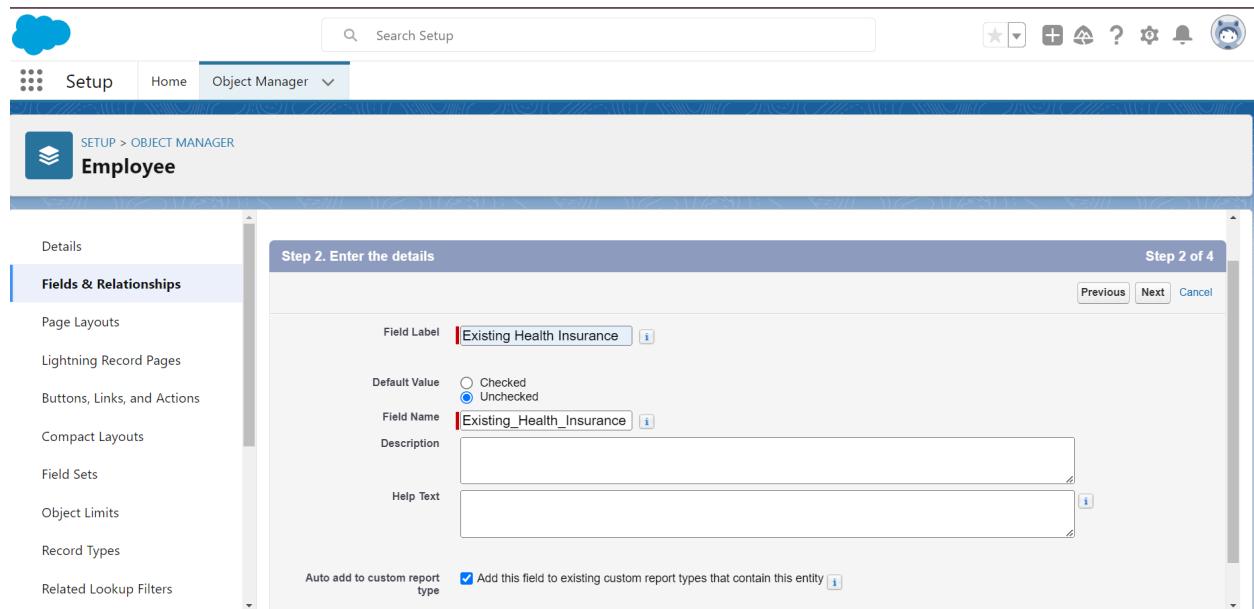
Field Name

Description

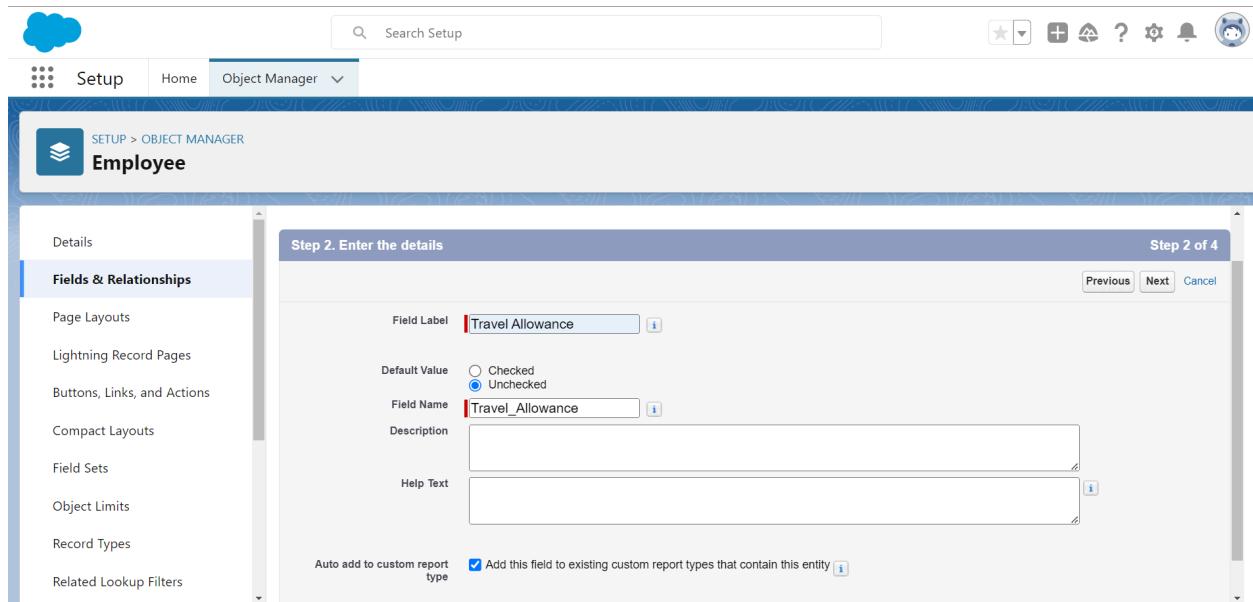
Help Text

Auto add to custom report type Add this field to existing custom report types that contain this entity

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 “Existing Health Insurance” . Field name will be auto generated.
5. Click Next→ Next → Next → Save .



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 “Travel Allowance” . Field name will be auto generated.
5. Click Next→ Next → Next → Save.



Activity 12 : 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 .

The top screenshot shows the 'Fields & Relationships' section of the Employee object setup. It lists various field types: Geolocation (selected), Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text, Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL. Descriptions for each type are provided.

The bottom screenshot shows the configuration of a specific Geolocation field. The 'Field Label' is set to 'Employee Location'. The 'Latitude and Longitude Display Notation' is set to 'Decimal'. The 'Decimal Places' are set to 15. The 'Field Name' is automatically generated as 'Employee_Location'. There is also a 'Description' and 'Help Text' section.

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 “Geolocation ” and click Next.
4. Enter the 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 .

Organization

Fields & Relationships

Geolocation

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

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.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Step 2. Enter the details

Field Label: Organization Location

Description: Enter the name of the location, such as Main Office. Be descriptive and specific, and remember that one record may have multiple locations, such as West Coast Sales Office and East Coast Sales Office.

Latitude and Longitude Display Notation: Decimal

Decimal Places: 15

Field Name: Organization_Location

Help Text:

Activity 13 : 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.
3. Select Data type as “Formula ” and click Next.
4. Select “Number” as Formula Return type. Enter “Age” as a 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 → Next → Save .

Specify the type of information that the custom field will contain.

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula** A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.

Field Label **Age** Field Name **Age**

Auto add to custom report type Add this field to existing custom report types that contain this entity

Formula Return Type

- None Selected Select one of the data types below.
- Checkbox Calculate a boolean value
Example: [TODAY() > CloseDate]
- Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: [Gross Margin = Amount - Cost_c]
- Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: [Reminder Date = CloseDate - 7]
- Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: [Next = NOW() + 1]
- Number** Calculate a numeric value.
Example: [Fahrenheit = 1.8 * Celsius_c + 32]

Formula Options

Formula Return Type: Number
Decimal Places: 0

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

Age (Number) = (TODAY() - Date_of_birth_c) / 365

Insert Field Insert Operator

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

7. Go to setup → click on Object Manager → type object name(Employee) in quick find bar→ click on the object.
8. Now click on “Fields & Relationships” → New.
9. Select Data type as “Formula ” and click Next.
10. Select “Number” as Formula Return type. Enter “Distance” as Field label. Field name will be auto generated.
11. Click Next, In the Advanced Formula space enter the formula.
DISTANCE(Organization_r.Organization_Location_c , Employee_Location_c , 'km'), Check the syntax.
12. Click Next→ Next → Next → Save .

Formula Options

Formula Return Type: Number
Decimal Places: 2

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

Distance (Number) = DISTANCE(Organization_r.Organization_Location_c , Employee_Location_c , 'km')

Insert Field Insert Operator

Functions

-- All Function Categories --

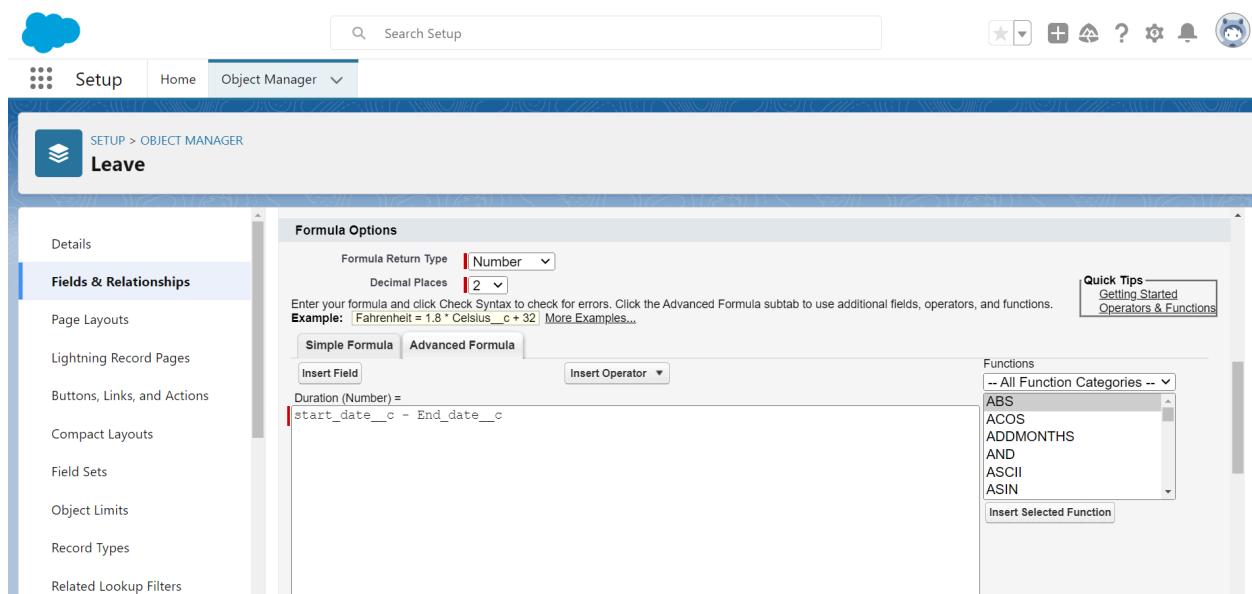
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

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.
2. 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 .



Activity 14 : 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.

The screenshot shows the 'Employee Validation Rule' setup screen. The 'Validation Rule Edit' tab is selected. The 'Rule Name' field contains 'TravelAllowanceOnlyForGreaterDistance'. The 'Active' checkbox is checked. The 'Error Condition Formula' section contains the formula: `IF(Distance_c <15, Travel_Allowance_c ==true, Travel_Allowance_c ==false)`. The 'Functions' dropdown shows 'ABS' and 'ACOS' listed. A 'Quick Tips' box is visible on the right, containing 'Operators & Functions'.

This screenshot shows the same validation rule setup screen, but the formula has been expanded to show its components. The expanded formula is: `IF(Distance_c <15, Travel_Allowance_c ==true, Travel_Allowance_c ==false)`. A tooltip for the 'ABS' function is open, stating: 'Returns the absolute value of a number, a number without its sign'. The 'Functions' dropdown also lists 'ACOS', 'ADDMONTHS', 'AND', 'ASCII', and 'ASIN'.

The screenshot shows the validation rule setup screen with the 'Error Message' section expanded. The 'Example' field contains 'Discount percent cannot exceed 30%'. The 'Error Message' field contains 'Distance is greater than 15 you should select travel allowance required'. The 'Error Location' dropdown is set to 'Field: Travel Allowance'. The 'Check Syntax' button is visible at the bottom left, and the 'Help on this function' link is visible at the bottom right.

Milestone 6 : 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.

Activity 1 : Create Email Template For Emergency Leave Approval

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.

Sales Home page screenshot:

Search bar: Search...

Top navigation: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, More.

Left sidebar:

- Apps: Employee Mapp
- Items:
 - Contract Line Items
 - Credit Memos
 - Email Templates
 - Employees
 - Engagement Channel Types
- View More

Chart area: A line chart showing engagement channel types from July to September. The Y-axis ranges from 0 to 80K. The X-axis shows Jul, Aug, and Sept. Legend: Closed (orange), Goal (green), Closed + Open (> 70%) (blue).

Right sidebar:

Assistant

Nothing needs your attention right now. Check back later.

Stay ahead of incidents

Help your teams proactively respond to large-scale disruptions with the free Customer Service Incident Management solution from Service Cloud.

Dismiss Get Started

Employee Mapp page screenshot:

Search bar: Search...

Top navigation: Employees, Organizations, Health Insurances, Accounts, Reports, Dashboards, Email Templates, More.

Left sidebar:

- Apps: No results
- Items:
 - Email Templates
 - List Emails
- View All

Table area:

| 4 | <input type="checkbox"/> Sanavi | |
|---|---------------------------------|--|
| 5 | <input type="checkbox"/> Rekha | |
| 6 | <input type="checkbox"/> Nisha | |

New Import

Search this list...

https://smartintern284-dev-ed.develop.lightning.force.com/lightning/o/EmailTemplate/home

The top screenshot shows the 'Edit Emergency Leave Approved' dialog. It includes fields for 'Email Template Name' (set to 'Emergency Leave Approved'), 'Related Entity Type' (set to 'Employee'), 'Description' ('Your emergency leave request was approved'), and 'Folder' ('Public Email Templates'). The bottom screenshot shows the 'Message Content' dialog, which contains a 'Subject' field ('Your emergency leave request was approved'), an 'Enhanced Letterhead' search bar, and an 'HTML Value' rich text editor. The rich text editor contains the following content:

```


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.


```

Milestone 7 : 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)

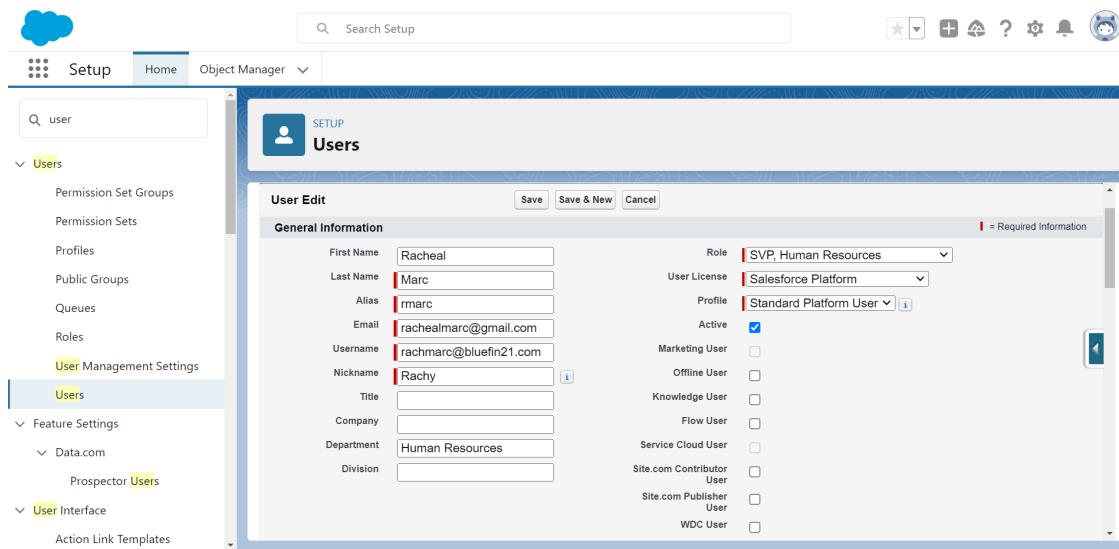
Activity 1:

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
9. 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.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, 'Setup' (selected), 'Home', and 'Object Manager'. A search bar says 'Search Setup' with a magnifying glass icon. To the right are various icons for navigation and help. The left sidebar has a tree view with 'Users' selected under 'User Management Settings'. Other visible items include 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', 'Prospector', and 'User Interface'. The main content area is titled 'User Edit' with tabs 'Save', 'Save & New', and 'Cancel'. It's for a 'Users' record. The 'General Information' section contains the following fields and values:

| Field | Value |
|---------------------------|-------------------------------------|
| First Name | Dave |
| Last Name | Jone |
| Alias | djone |
| Email | Djones@gmail.com |
| Username | Djone@Official1.com |
| Nickname | User1691145389798712161 |
| Title | Manager |
| Company | (empty) |
| Department | Sales |
| Division | (empty) |
| Role | SVP, Sales & Marketing |
| User License | Salesforce Platform |
| Profile | Standard Platform User |
| Active | <input checked="" type="checkbox"/> |
| Marketing User | <input type="checkbox"/> |
| Offline User | <input type="checkbox"/> |
| Knowledge User | <input type="checkbox"/> |
| Flow User | <input type="checkbox"/> |
| Service Cloud User | <input type="checkbox"/> |
| Site.com Contributor User | <input type="checkbox"/> |

A note at the top right says '! = Required Information'.

Milestone 8 : 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:

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.

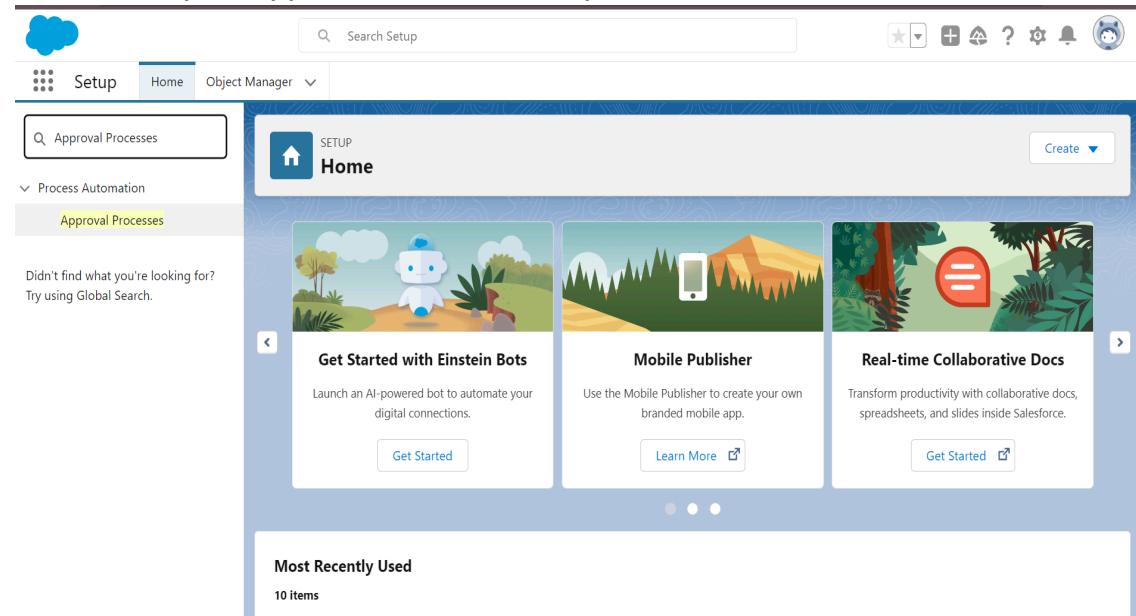
4. Recall Actions

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.

Activity 1 : 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.



2. Manage Approval Process For → “Leave” from the drop down.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, a search bar labeled "Search Setup", and various global buttons. The left sidebar has sections for Data, Process Automation, and Approval Processes, with "Approval Processes" currently selected. The main content area is titled "Approval Processes" and contains a help section with 7 steps: 1. Read the help topic, 2. View the checklist, 3. Create a custom user hierarchical relationship field, 4. Create email templates, 5. Create an approval process using either the Jump Start or Standard Wizard, 6. Add Approval History Related List to all page layouts, and 7. Activate the process to deploy to your users. Below this is a dropdown menu "Manage Approval Processes For: Leave". A note states: "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 set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options." There are two sections: "Active Approval Processes" (empty) and "Inactive Approval Processes" (empty). The "Active Approval Processes" section has a "Reorder" button.

3. Click on “Create New Approval Process” → Use standard setup wizard.

4. Process Name “Emergency Leave Approval” → Click Next.

This screenshot is identical to the one above, but the "Create New Approval Process" dropdown is open, showing two options: "Use Jump Start Wizard" and "Use Standard Setup Wizard". The "Use Standard Setup Wizard" option is highlighted with a blue selection bar.

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.

| Field | Operator | Value | Logic |
|-------------------|----------|-----------------|-------|
| Leave: Leave Type | equals | Emergency Leave | AND |
| --None-- | --None-- | | AND |
| --None-- | --None-- | | AND |
| --None-- | --None-- | | |

The screenshot shows the Salesforce Setup interface with the 'Approval Processes' page open. The page title is 'Emergency Leave Approval'. The current step is 'Step 2 of 6'. The 'Specify Entry Criteria' section contains a table with three columns: 'Field', 'Operator', and 'Value'. The first row has 'Leave: Leave Type' in the Field column, 'equals' in the Operator column, and 'Emergency Leave' in the Value column. There are three additional rows below it, each with '--None--' in all three columns. The 'Value' column for the first row has a small blue circular icon with a magnifying glass, indicating it's a lookup field.

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.
10. Under the Approval Assignment Email Template click in the lookup icon→Lightning →Public Email Templates “Emergency Leave Approved”.Then Next.

The screenshot shows the Salesforce Setup interface with the 'Approval Processes' page open. The page title is 'Emergency Leave Approval'. The current step is 'Step 3 of 6'. The 'Select Field Used for Automated Approval Routing' section contains two dropdown menus: 'Next Automated Approver Determined By' (set to 'Manager') and 'Use Approver Field of Leave Owner' (with a checked checkbox). Below this is the 'Record Editability Properties' section, which contains two radio buttons: 'Administrators ONLY can edit records during the approval process.' (selected) and 'Administrators OR the currently assigned approver can edit records during the approval process.'

The screenshots illustrate the configuration of an Approval Process in Salesforce. In the top screenshot, the user is on the 'Step 4. Select Notification Templates' page of an approval process named 'Emergency Leave'. They have selected the 'Emergency Leave Approved' template, which is described as 'Your emergency leave request was approved'. This template is of type 'Custom'. In the bottom screenshot, the user is viewing the 'Approval Processes' list, where 'Emergency Leave Approval' is selected. They are then shown the 'Step 4. Select Notification Templates' page again, where they have selected the 'Emergency Leave Approver' template.

11. 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.

The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.

Available Fields

- Created By
- Duration
- Employee
- End date
- Last Modified By
- Leave start date

Selected Fields

- Leave ID
- Owner
- Leave Type
- Status

[Click here to view an example](#)

Using the options below, specify which users are allowed to submit the initial request for approval. For example, expense reports should normally be submitted for approval only by their owners.

Initial Submitters

Submitter Type: Search: Owner for: Find

Available Submitters

- None--

Allowed Submitters

- Leave Owner

13. 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.

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

Search Setup

Setup Home Object Manager

Q Appro

Data Mass Transfer Approval Requests

Process Automation Approval Processes

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

SETUP Approval Processes

Approval Step Edit Approver 1

Step 2. Specify Step Criteria Step 2 of 3

Specify whether a record must meet certain criteria before entering this approval step. If these criteria are not met, the approval process can skip to the next step, if one exists. [Learn more](#)

Specify Step Criteria

All records should enter this step.

Enter this step if the following criteria are met, else reject record:

Previous Save Next Cancel

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.

Search Setup

Setup Home Object Manager

Q Appro

Data Mass Transfer Approval Requests

Process Automation Approval Processes

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

SETUP Approval Processes

Select Approver

Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.

Let the submitter choose the approver manually.

Automatically assign using the user field selected earlier. (Manager)

Automatically assign to queue.

Automatically assign to approver(s).

User Sanjana Tunk

Add Row Remove Row

When multiple approvers are selected:

Approve or reject based on the FIRST response.

Require UNANIMOUS approval from all selected approvers.

The approver's delegate may also approve this request.

Previous Save Cancel

19. While on the same Approval Process page .Under the "Final Approval Action" click Add New from the drop down select "Email Alert".

Search Setup

Home Object Manager

Approval Processes

| Action | Type | Description |
|--------|-------------|-----------------------------------|
| | Record Lock | Lock the record from being edited |

| Approval Steps | | New Approval Step | | | | |
|---------------------------|-------------|-------------------|-------------|----------|-------------------|-----------------|
| Action | Step Number | Name | Description | Criteria | Assigned Approver | Reject Behavior |
| Show Actions Edit Del | 1 | Approver 1 | | | User:Sanjana Tunk | Final Rejection |

| Final Approval Actions | | Add Existing Add New | | |
|------------------------|-------------|---|--|--|
| Action | Type | Description | | |
| Edit | Record Lock | Lock the record | | |
| Edit Remove | Email Alert | Your emergency leave request was approved | | |

| Final Rejection Actions | | Add Existing Add New | | |
|-------------------------|-------------|-------------------------------|--|--|
| Action | Type | Description | | |
| Edit | Record Lock | Unlock the record for editing | | |

20.Description: Your emergency leave request was approved.Unique name is auto populated.

21.Email Template, click the lookup option and select Emergency Leave Approved.

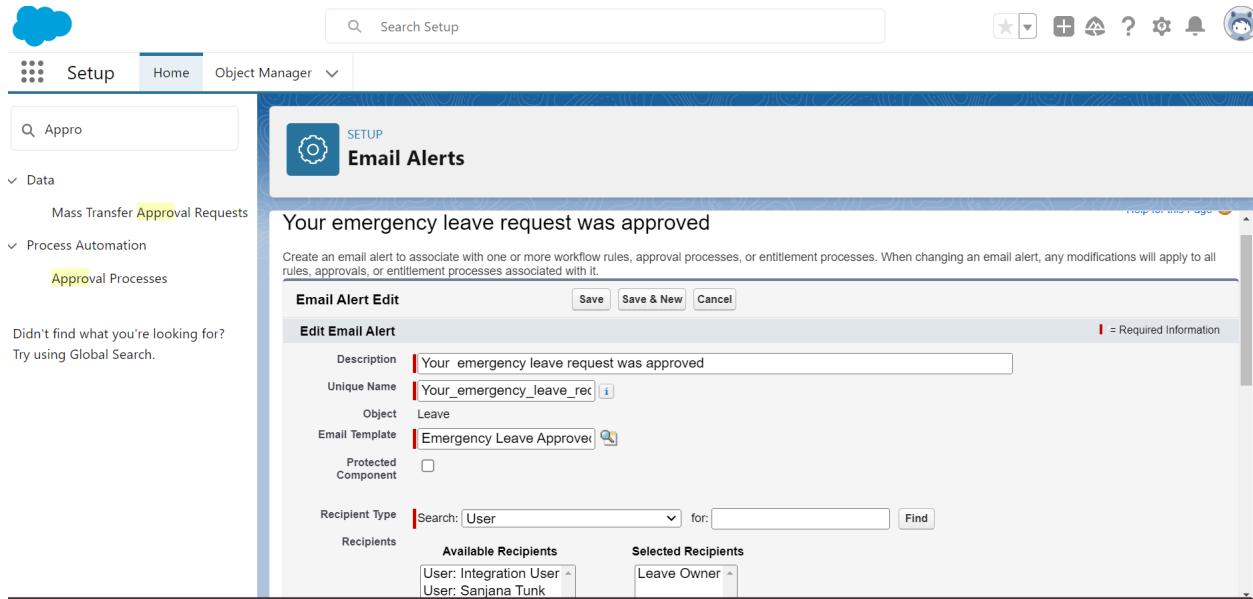
Search

Mass Transfer Approval Requests

Approval Processes

Recently Viewed Email Templates

| Name | Description | Template Type |
|--------------------------|---|---------------|
| Emergency Leave Approved | Your emergency leave request was approved | Custom |



22. Recipient Type : User, Selected Recipient : Leave Owner. Then click save.

Milestone 9 : Flows

What 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.

Schedule-Triggered Flows: These autolaunched flows launch at a specified time and frequency for each record in a batch, and they run in the background.

Autolaunched Flows: Run automated tasks with this flow type. Autolaunched 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 autolaunched flows run in the background either before a record save or after the record is saved when a record is created, updated, or deleted.

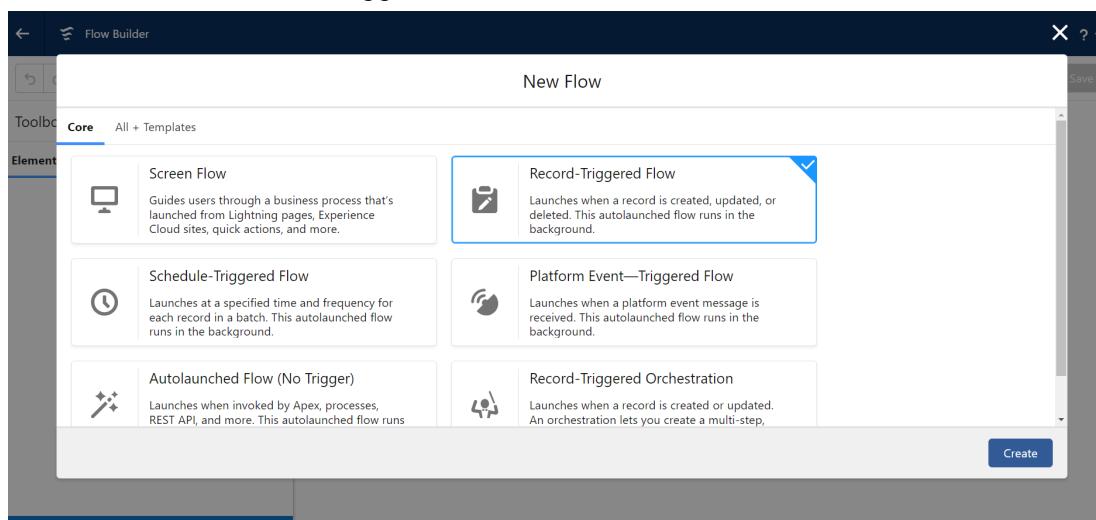
Platform Event-Triggered Flows: When a platform event message is received, these autolaunched flows run in the background.

When and why should we use a flow?

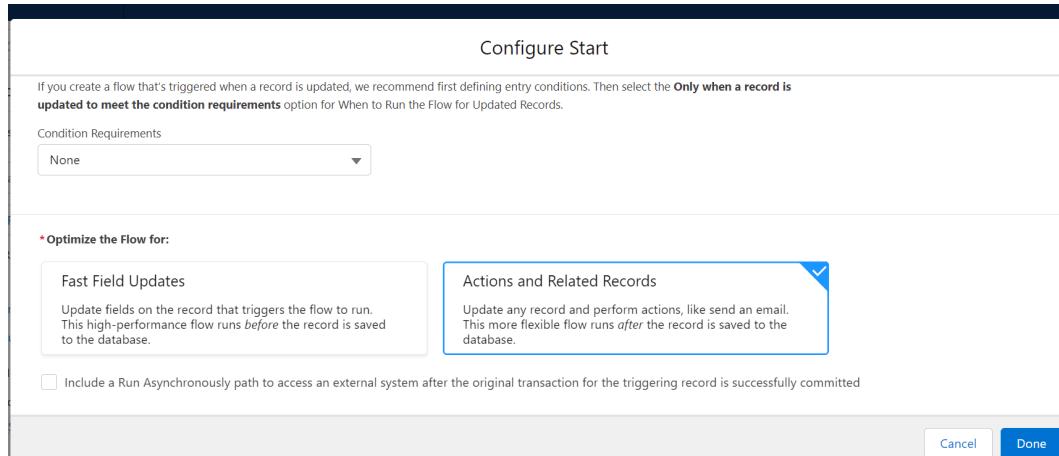
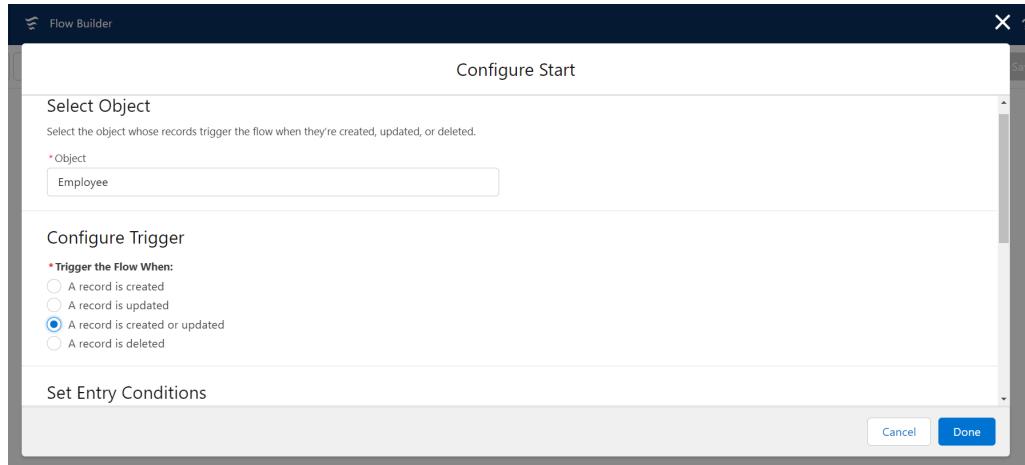
If you need to generate a new automated business process, or user guided experience that does not reach the complexity threshold for Apex Code, then flow is your go-to tool. If you are modifying an existing process that was built with Process Builder or workflow, then you should consider a number of 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.

Activity 1 : 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}`

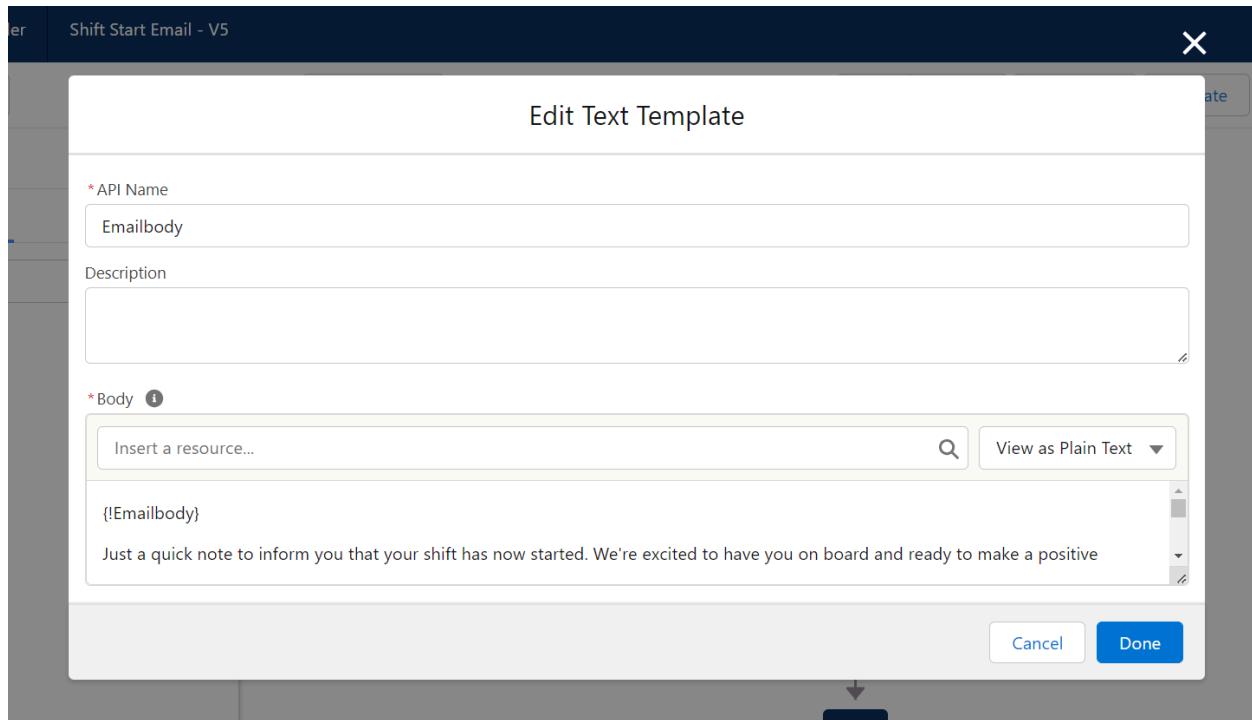
Just a quick note to inform you that your shift has now started. We're excited to have you on board and ready to make a positive impact today!

Should you need any support or have any questions during your shift, don't hesitate to reach out to your team members or supervisor.

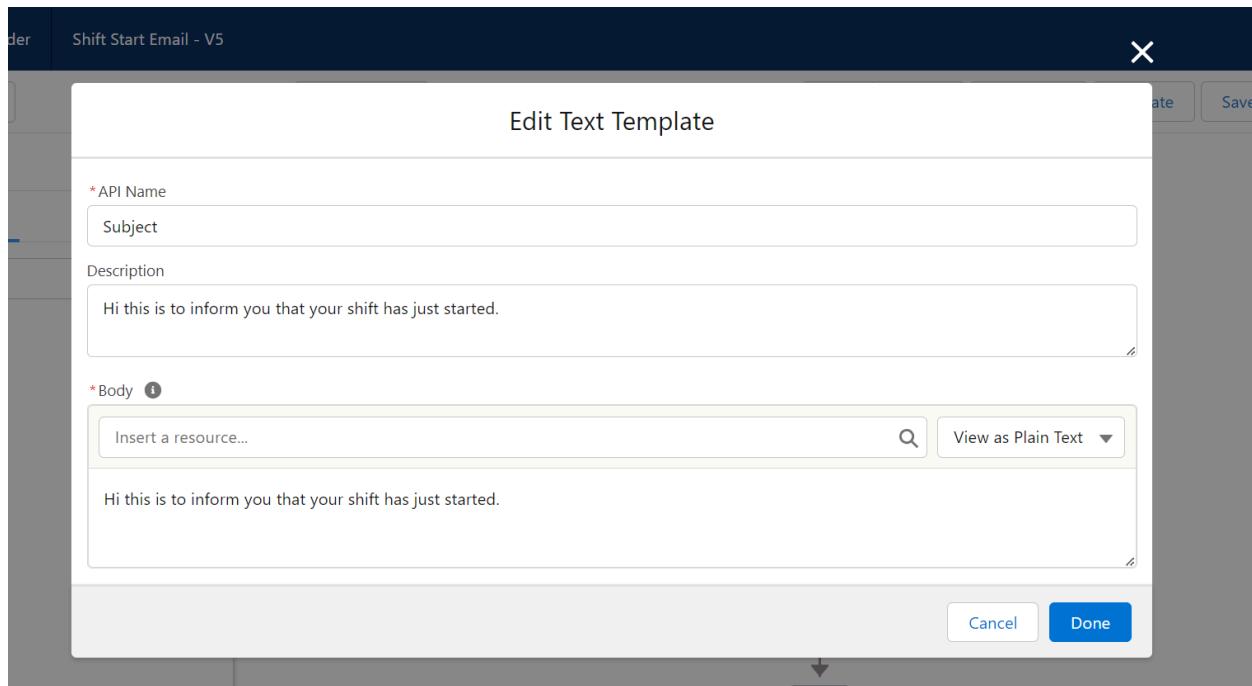
Health Issues If Any: `{!$Record.Health_Issues_If_Any__c}`

Existing Insurance: `{!$Record.Existing_Health_Insurance__c}`

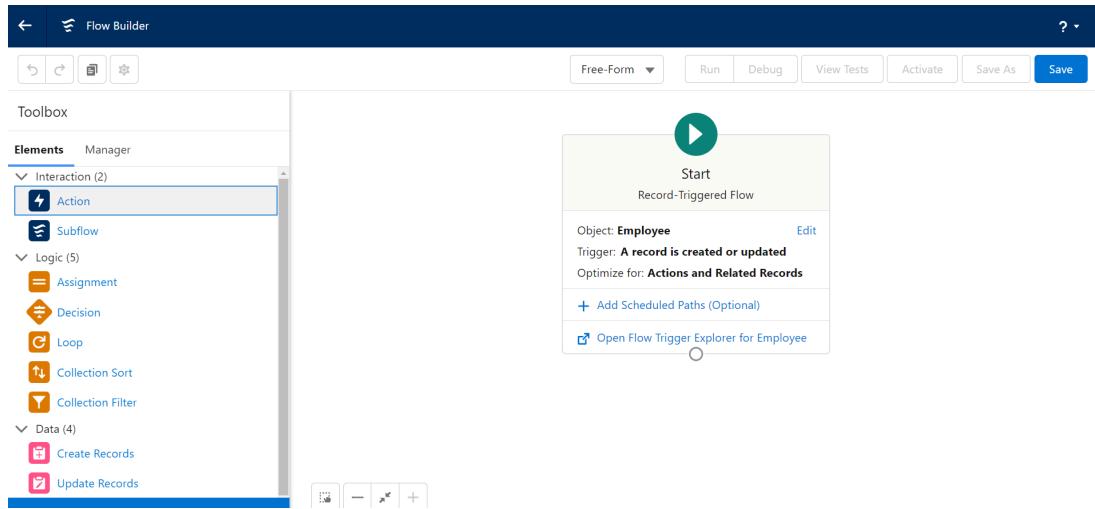
Travel Allowance: `{!$Record.Travel_Allowance__c}`



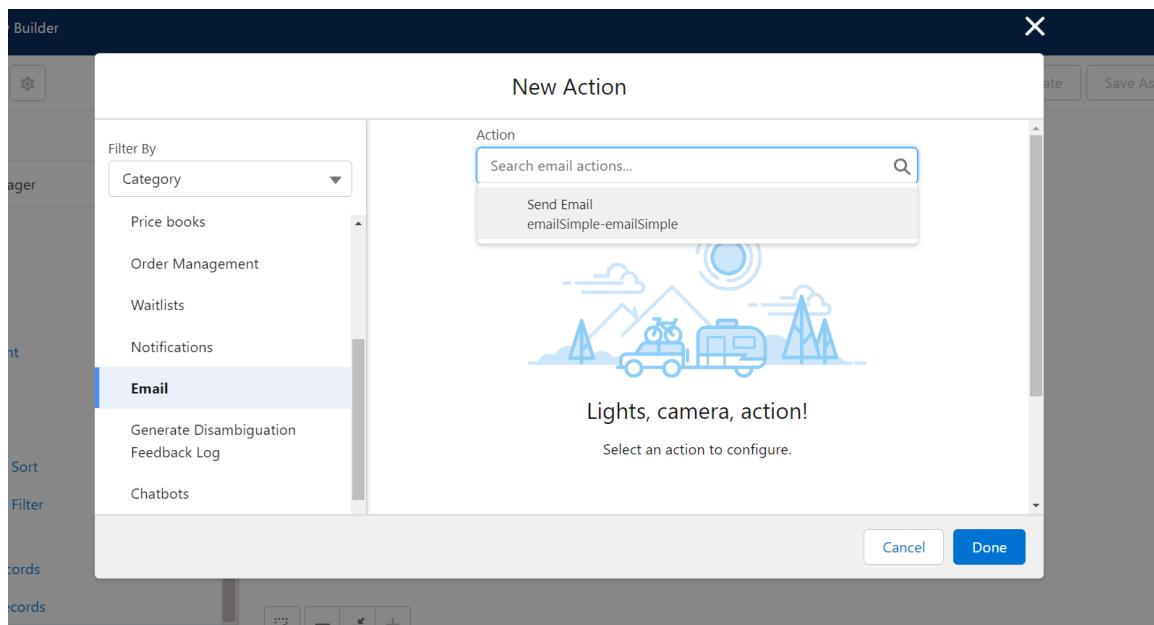
7. Click “New Resource” under manager.
8. Select “Text Template”
9. Then API name should be filled as “Subject”.And enter the given details in it (Hi this is to inform you that your shift has just started.)Make sure it is “view as plain text”.
10. Click Done.



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



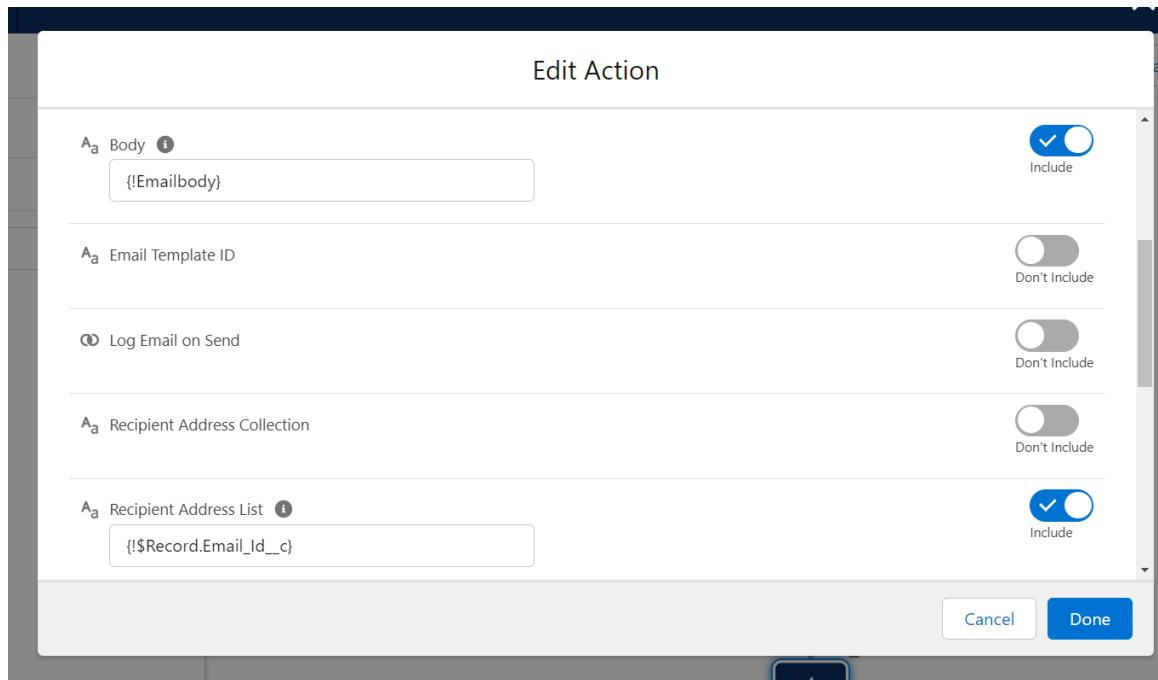
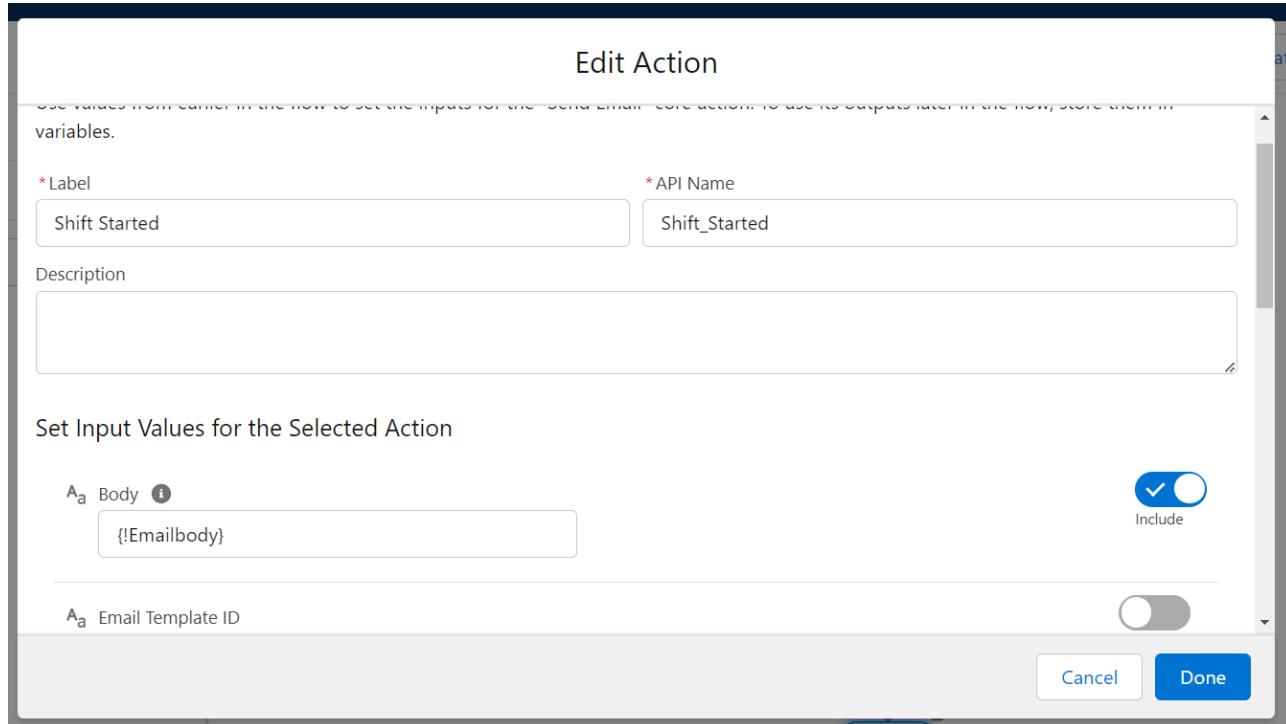
12. Under Category dropdown select Email, Then in the action bar select “Send Email”action.

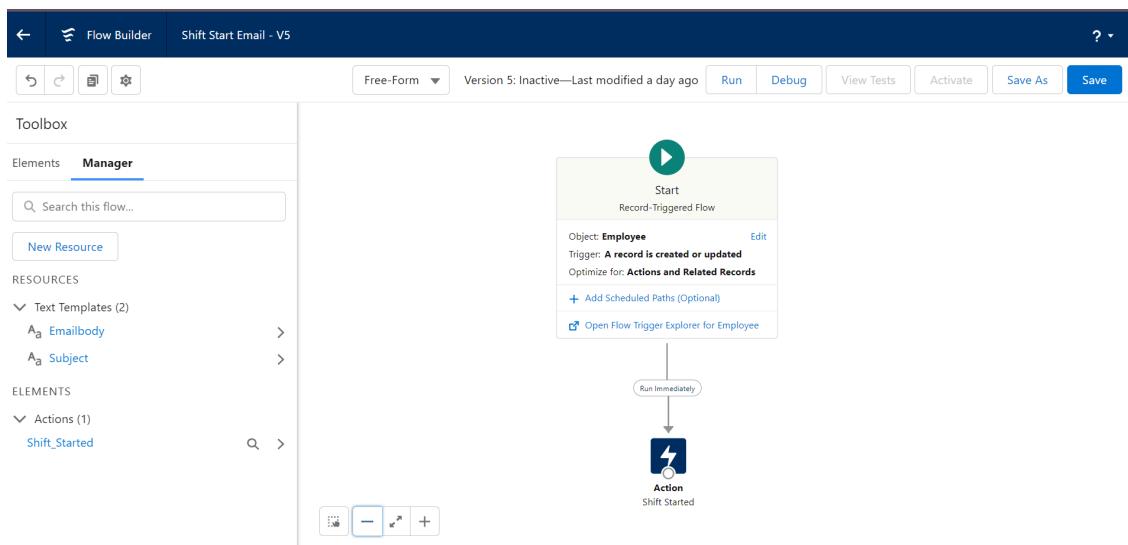
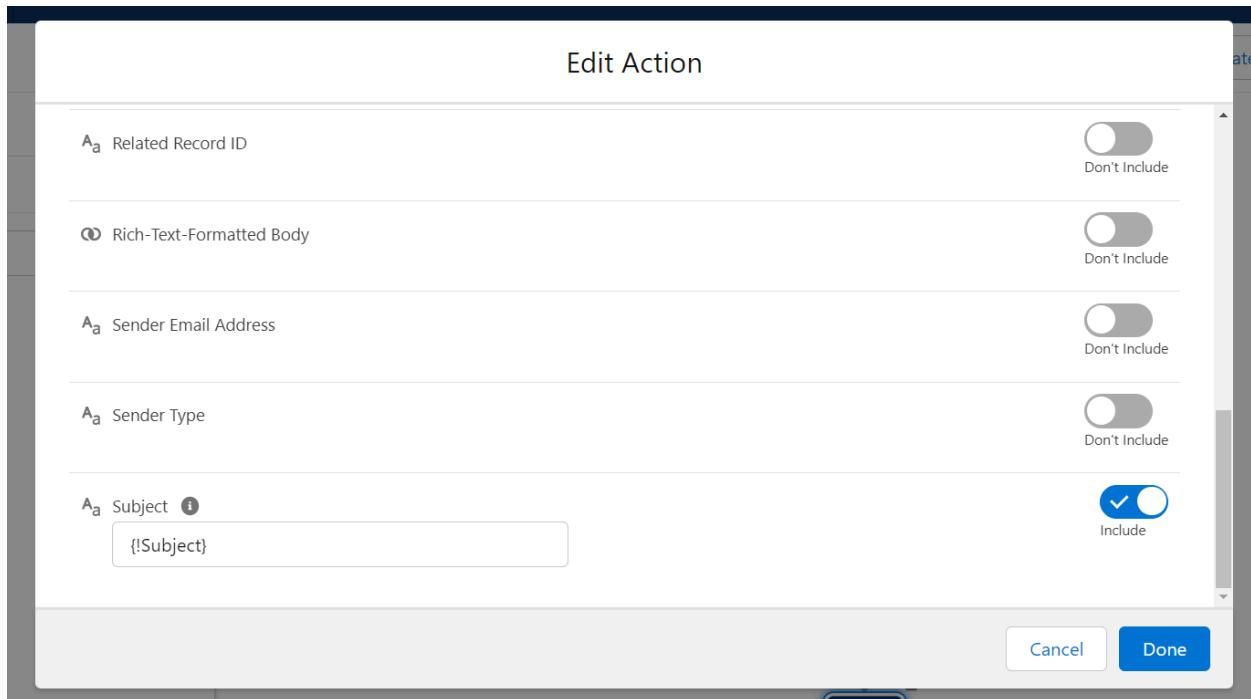


13. Give API name as “Shift Started”.

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.





Activity 2 : 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.

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

Object
Leave

Configure Trigger

Trigger the Flow When:
 A record is created
 A record is updated
 A record is created or updated
 A record is deleted

Set Entry Conditions

Cancel 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.
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.

Flow Builder

Free-Form ▾ Run Debug View Tests

Toolbox

Elements **Manager**

Search this flow...

New Resource

Start
Record-Triggered Flow

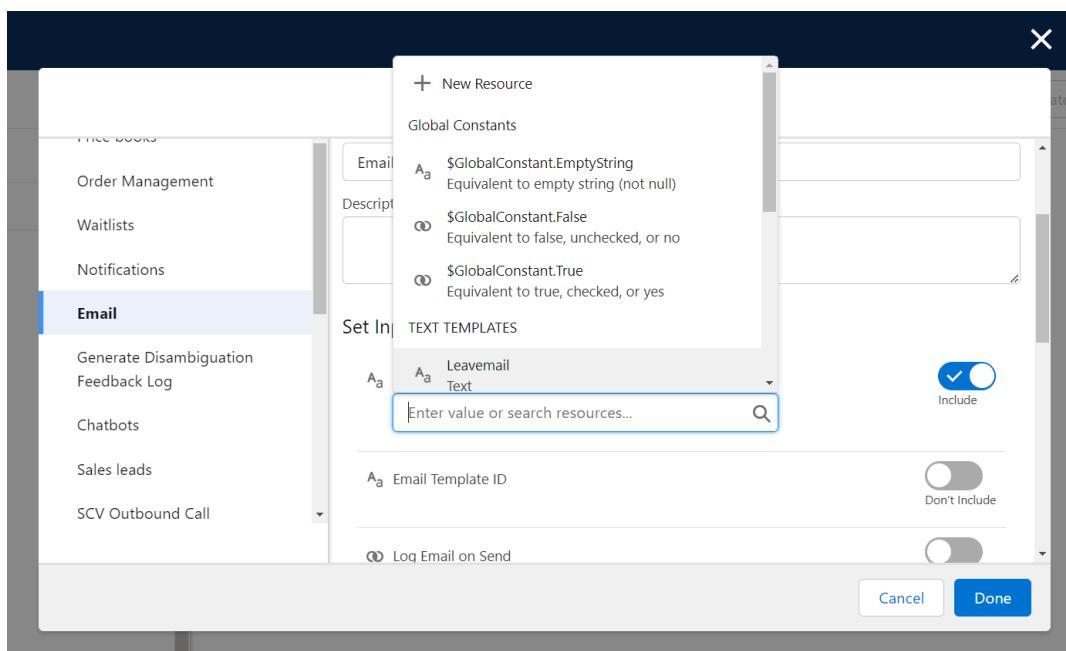
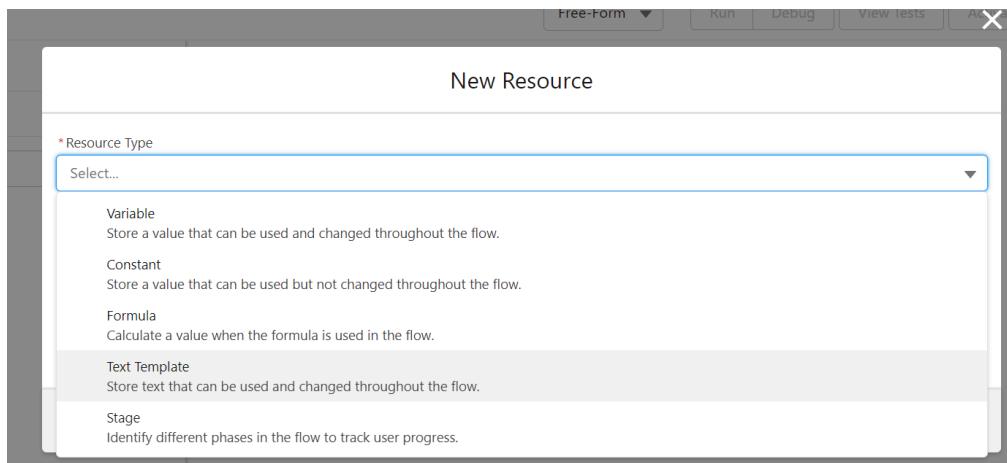
Object: Leave Edit

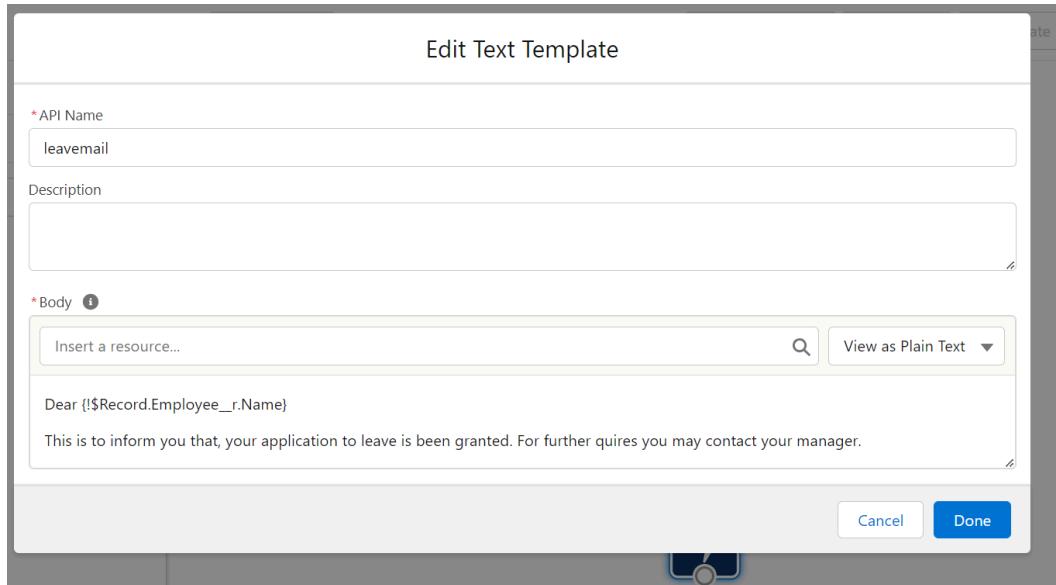
Trigger: A record is created or updated

Optimize for: Actions and Related Records

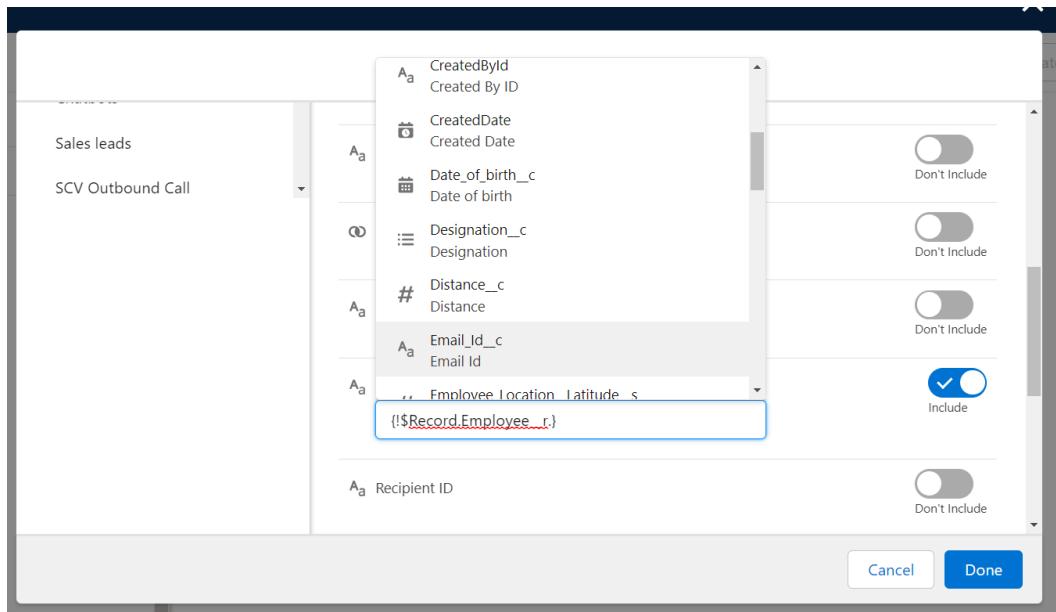
+ Add Scheduled Paths (Optional)

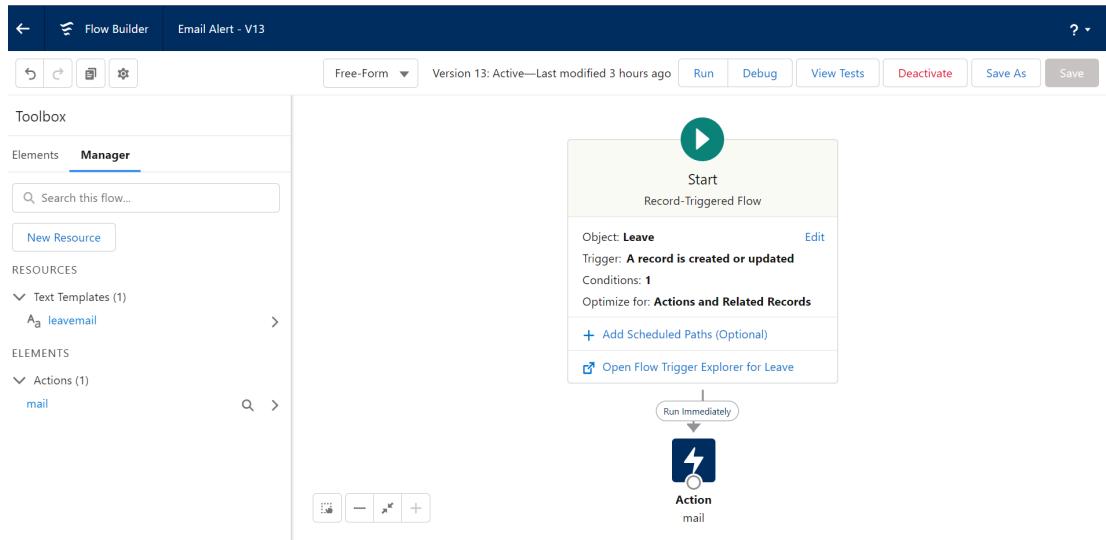
Open Flow Trigger Explorer for Leave





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.

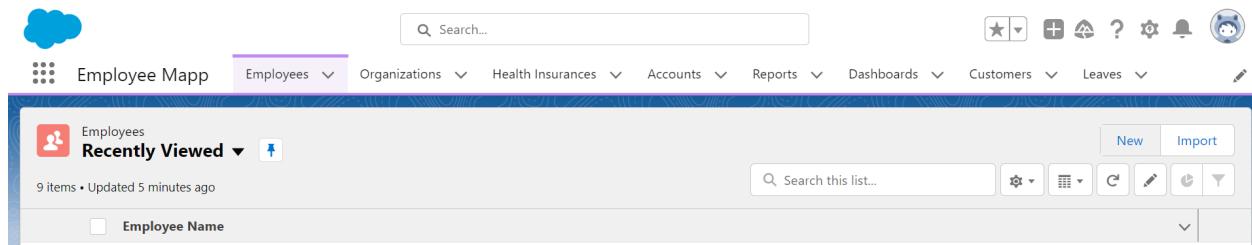




Milestone 10 : User Adoption

Activity 1 : 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.

New Employee

* = Required Information

Information

* Employee Name

Phone number

Email Id

Date of birth
 

Gender
 --None--

Salary

Health Issues If Any

Existing Health Insurance

Health Insurance
 I-005

Employee Location

Latitude

Longitude

* Organization
 HSBC

Travel Allowance

Shift Timings

Buttons: Cancel, Save & New, Save

4. 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)

Health Issues If Any

Existing Health Insurance

Health Insurance
 I-005

Employee Location

Latitude

Longitude

* Organization
 HSBC

Travel Allowance

Shift Timings

Buttons: Cancel, Save & New, Save

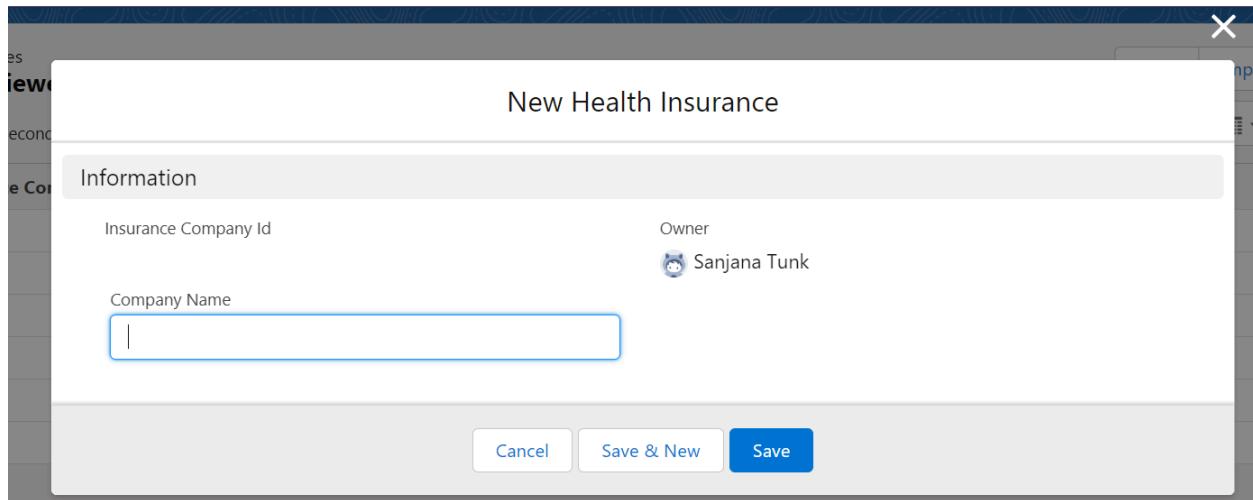
Activity 2 : Create Records for the Organization object.

The screenshot shows the Salesforce interface for creating a new organization record. The 'Organization Name' field contains 'IBM'. The 'Email Id' field contains 'HR@IBM.com'. The 'Phone number' field contains '9996578721'. The 'Website' field contains 'https://www.ibm.com/in'. Under 'Organization Location', the 'Latitude' field contains '17.42385553150533' and the 'Longitude' field contains '78.37782676307994'. At the bottom, there are buttons for 'Cancel', 'Save & New', and 'Save'. The status bar at the bottom indicates the record was created by 'Sanjana Tunk' on '18/07/2023, 4:57 pm'.

1. Click on the organization Tab .Click on New.
2. 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)

Activity 3 : Create Records for the Health Insurance object

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



- Give the Insurance Company Name. Click save and New . Similarly create few more records.

Activity 3 : Create Records for the Leave object.

- Click on the Leave Tab .Click on New.
- Fill The leave details.
- Click save and New. Similarly create a few more records.

The screenshot shows a Salesforce application window for creating a new leave record. The form fields are as follows:

- Employee: Karishma
- *Leave: Required
- Leave Type: Medical Leave
- start date: 05/09/2023
- End date: 06/09/2023
- Status: On leave

At the bottom, there are three buttons: Cancel, Save & New (disabled), and Save.

Milestone 11 : 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

Note: (Make sure to create records in Employee, Organization, Health Insurances, Leaves)

Let's create a Report.

Activity 1:

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.

The screenshot shows the 'Create Report' dialog box. On the left, there's a sidebar with categories like 'Recently Used' and 'All'. Under 'All', there are options for 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', and 'Campaigns'. The main area is titled 'Select a Report Type' and contains a search bar with 'Travel' typed in. Below the search bar, two report types are listed: 'Employees with Organizations with Travel Allowances' and 'Organizations with Employees with Travel Allowances', both categorized as 'Custom'.

The screenshot shows the report configuration interface. At the top, the report title is 'Employees with Organizations with Travel Allowances'. The interface includes sections for 'Outline' (with 'GROUP ROWS' selected), 'Filters' (with a note about previewing a limited number of records), and 'Columns' (with 'Employee Name' selected). The preview pane shows a list of employee names: Nisha, Rekha, Reshma, Kareena, Sanjana, Sanavi, and Rani.

The screenshot shows the Employee Mapp application interface. At the top, there is a navigation bar with icons for cloud, employee map, and user profile. The main menu includes Employees, Organizations, Health Insurances, Accounts, Reports (selected), Dashboards, Customers, and Leaves. A search bar is located at the top right.

The central area is titled "REPORT" and "Travel Allowances Report". Below this, the title "Employees with Organizations with Travel Allowances" is displayed. On the left, there is a sidebar titled "Fields" with sections for "Groups" (containing "GROUP ROWS" and "Add group...") and "Columns" (containing "Employee Name", "# Travel Allowance", "# Distance", and "Shift Timings").

The main content area shows a preview of the report data:

| | Employee Name | Travel Allowance | Distance | Shift Timings |
|---|---------------|-------------------------------------|----------|------------------|
| 1 | Nisha | <input type="checkbox"/> | 14.22 | - |
| 2 | Rekha | <input type="checkbox"/> | 14.96 | - |
| 3 | Reshma | <input type="checkbox"/> | 14.42 | 10:00am - 5:00pm |
| 4 | Kareena | <input checked="" type="checkbox"/> | 2,239.95 | 10:00am - 5:00pm |
| 5 | Sanjana | <input type="checkbox"/> | 14.02 | 10:00am - 5:00pm |
| 6 | Sanavi | <input type="checkbox"/> | 14.29 | 10:00am - 5:00pm |
| 7 | Rani | <input type="checkbox"/> | 14.76 | 10:00am - 5:00pm |
| 8 | | 1 | 2,326.62 | |

At the top right of the preview area, there is a toggle switch for "Update Preview Automatically".

The screenshot shows the Employee Mapp application interface with a generated report titled "Report: Employees with Organizations with Travel Allowances" and "Travel Allowances Report".

The report summary at the top indicates:

- Total Records: 7
- Total Travel Allowance: 1
- Total Distance: 2,326.62

The report table is identical to the one in the configuration screen:

| | Employee Name | Travel Allowance | Distance | Shift Timings |
|---|---------------|-------------------------------------|----------|------------------|
| 1 | Sanjana | <input type="checkbox"/> | 14.02 | 10:00am - 5:00pm |
| 2 | Rekha | <input type="checkbox"/> | 14.96 | - |
| 3 | Sanavi | <input type="checkbox"/> | 14.29 | 10:00am - 5:00pm |
| 4 | Rani | <input type="checkbox"/> | 14.76 | 10:00am - 5:00pm |
| 5 | Nisha | <input type="checkbox"/> | 14.22 | - |
| 6 | Reshma | <input type="checkbox"/> | 14.42 | 10:00am - 5:00pm |
| 7 | Kareena | <input checked="" type="checkbox"/> | 2,239.95 | 10:00am - 5:00pm |
| 8 | | 1 | 2,326.62 | |

8. Similarly create a report for Organizations with Employees and Health Insurances and save it as "Employee and health insurances".

The screenshot shows the Employee Mapp application interface. At the top, there's a navigation bar with links for Employees, Organizations, Health Insurances, Accounts, Reports, Dashboards, Customers, Leaves, and a search bar. Below the navigation is a toolbar with icons for saving, running, closing, and running the report.

The main area is titled 'REPORT' and 'Employees and Health Insurances'. It displays a table with the following data:

| | Organization: Organization Name | Employee: Employee Name | Health Insurance: Insurance Company Id | Age |
|---|---------------------------------|-------------------------|--|-----|
| 1 | HSBC | Rani | I-003 | 23 |
| 2 | IBM | Sanjana | I-005 | 22 |
| 3 | Accenture | Kareena | I-006 | 25 |
| 4 | Accenture | Reshma | I-008 | 21 |
| 5 | | | | 91 |

The left sidebar shows 'Outline' and 'Filters' sections. Under 'Groups', there's a 'GROUP ROWS' section with 'Add group...'. Under 'Columns', there are fields for 'Organization: Organization Name', 'Employee: Employee Name', 'Health Insurance: Insurance Company Id', and '# Age'.

9. Similarly create a report for Leave with employee and save it as "Employee leave details".

The screenshot shows the Employee Mapp application interface, similar to the previous one but with a different report title.

The main area is titled 'REPORT' and 'Employee leave details'. It displays a table with the following data:

| | Duration ↑ | Employee: Employee Name | Employee: Phone number | Leave Type |
|-----------|------------|-------------------------|------------------------|------------|
| -5.00 (2) | Kareena | 9949686541 | Casual Leave | |
| | Sanjana | 7702816383 | Emergency Leave | |
| Subtotal | | | | |
| -1.00 (3) | Kareena | 9949686541 | Medical Leave | |
| | Sanavi | 7702816383 | Emergency Leave | |
| | Rani | 1234567890 | Emergency Leave | |
| Subtotal | | | | |
| 0.00 (1) | Reshma | 9989767521 | Half-day Leave | |
| Subtotal | | | | |
| Total (6) | | | | |

The left sidebar shows 'Fields' and 'Outline' sections. Under 'Groups', there's a 'GROUP ROWS' section with 'Add group...'. Under 'Columns', there are fields for 'Employee: Employee Name' and 'Employee: Phone number'.

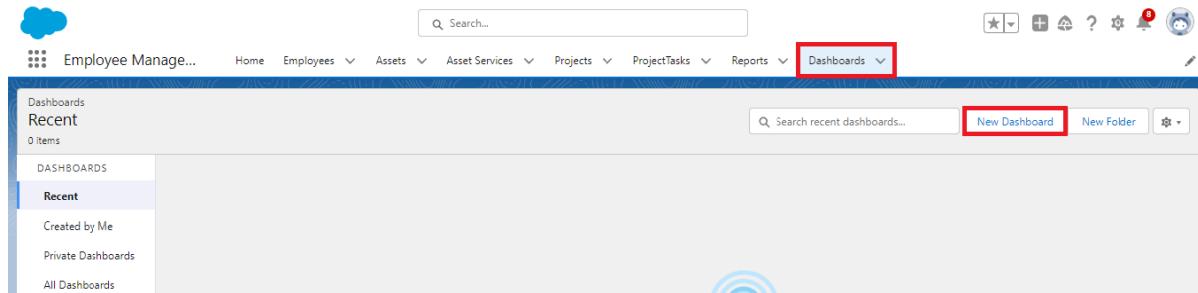
Milestone 12 : Dashboards

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

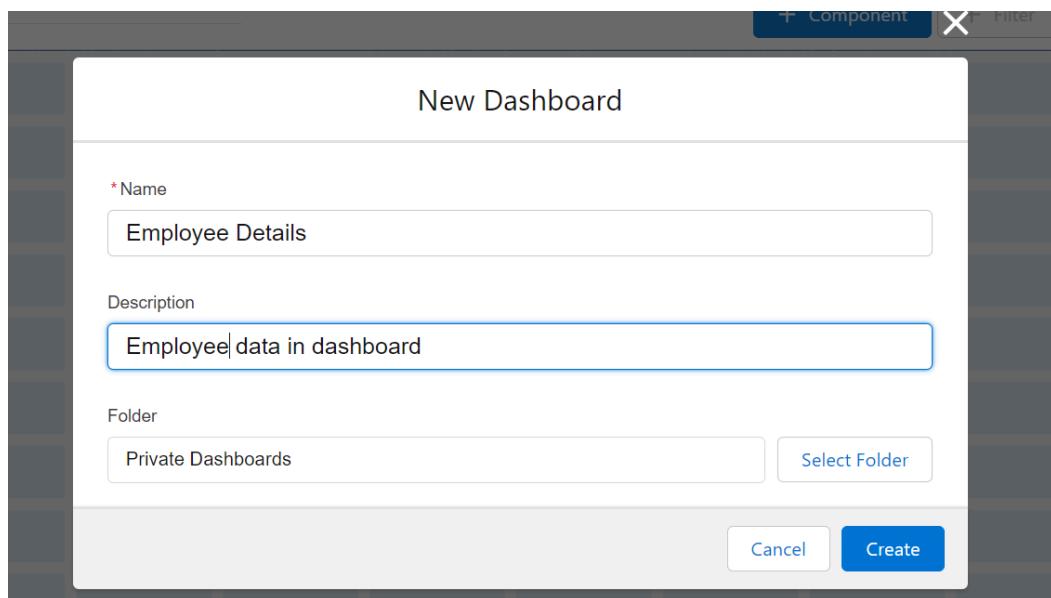
dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Create Dashboard

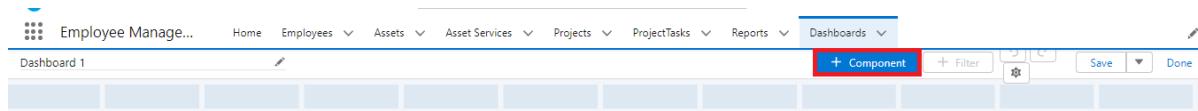
1. Go to the app → click on the Dashboards tabs.



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.

Employee Map

Employee Details

Search... Employees Organizations Health Insurances Accounts Reports Dashboards Customers Leaves

+ Component + Filter Save X Done

Select Report

Reports

Recent

- Created by Me
- Private Reports
- Public Reports
- All Reports

Folders

- Employee with leaves
Sanjana Tunk · 01-Aug-2023, 3:52 pm · Private Reports
- Employees and Health Insurances
Sanjana Tunk · 01-Aug-2023, 3:45 pm · Private Reports
- Travel Allowances Report
Sanjana Tunk · 01-Aug-2023, 3:23 pm · Private Reports

Cancel Select

Add Component

Report

Employee with leaves

Use chart settings from report i

Display As

Bar Chart

Employee with leaves

Record Count

Duration

View Report (Employee with leaves)

Cancel Add

Add Component

Report

Employees and Health Insurances

Use chart settings from report i

Display As

Line Chart

Employees and Health Insurances

Sum of Age

Organization: Organization Name

View Report (Employees and Health Insurances)

Cancel Add

Edit Component

Report

Travel Allowances Report (X)

Use chart settings from report (i)

Display As

Y-Axis

Preview

Travel Allowances Report

Sum of Travel Allowance

| Organization Name | Sum of Travel Allowance |
|-------------------|-------------------------|
| Accenture | 1.00 |
| HSBC | 0.00 |
| IBM | 0.00 |

View Report (Travel Allowances Report)

Cancel Update

Employee Mapp Employees Organizations Health Insurances Accounts Reports Dashboards * Sanjana Tunk More Done

Employee Details

+ Component + Filter Save Done

Employee with leaves

| Duration | Record Count |
|----------|--------------|
| -5.00 | 2 |
| -1.00 | 3 |
| 0.00 | 1 |

View Report (Employee with leaves)

Employees and Health Insurances

| Organization Name | Sum of Age |
|-------------------|------------|
| Accenture | 46 |
| HSBC | 23 |
| IBM | 22 |

View Report (Employees and Health Insurances)

Travel Allowances Report

Sum of Travel Allowance

| Organization Name | Sum of Travel Allowance |
|-------------------|-------------------------|
| Accenture | 1.00 |
| HSBC | 0.00 |
| IBM | 0.00 |

View Report (Travel Allowances Report)

Milestone 13: 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.

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:**

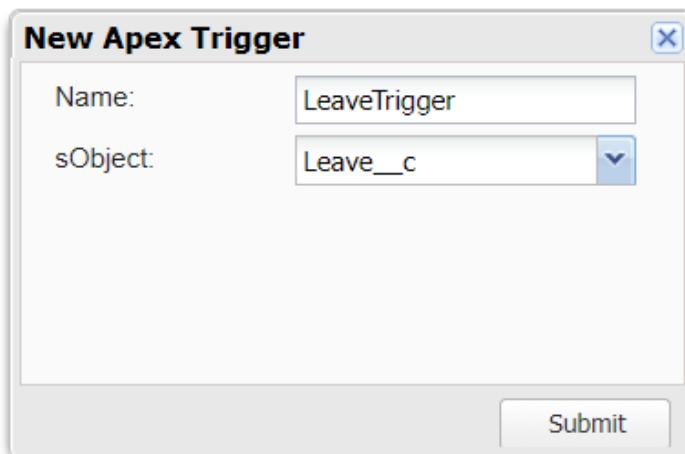
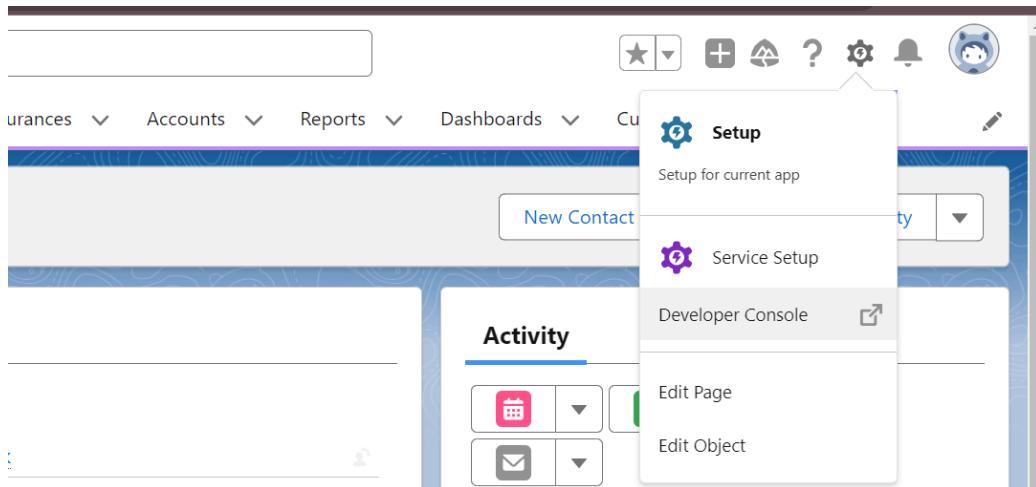
As in Java, you can create classes in Apex. A class is a template or blueprint from which objects are created. An object is an instance of a class.

- **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.

Steps to 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”.



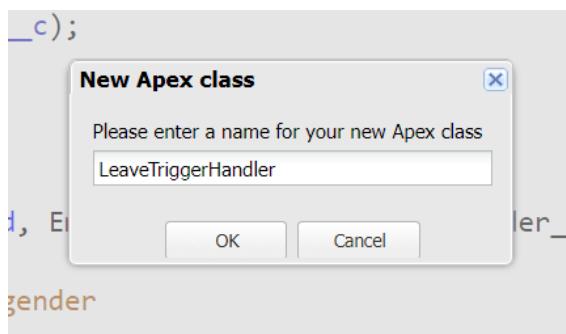
5. Enter the given code in the console, check for errors and save.

```
trigger LeaveTrigger on Leave__c (before insert) {
    if(trigger.isBefore){
        if(trigger.isInsert){
            LeaveTriggerHandler.ifMaleEmployee(trigger.new);
        }
    }
}
```

```
trigger LeaveTrigger on Leave__c (before insert) {
    if(trigger.isBefore){
        if(trigger.isInsert){
            LeaveTriggerHandler.ifMaleEmployee(trigger.new);
        }
    }
}
```

Steps to create a Class in APEX:

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> employeelds = new Set<Id>();
        for (Leave__c leaveRequest : leaveRequests) {
            if (leaveRequest.Employee__c != null) {

                employeelds.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 :employeelds]);

        // 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') {
                    leaveRequestaddError('Male employees are not eligible for Maternity
Leave');
                }
            }
        }
    }
}

```

4. Check for errors and save it.

The screenshot shows a Salesforce IDE interface with the following details:

- File Bar:** File, Edit, Debug, Test, Workspace, Help.
- Title Bar:** LeaveTriggerHandler.apxc (active), LeaveTrigger.apxt.
- Status Bar:** Code Coverage: None, API Version: 58.
- Code Editor:** Displays the following Apex code:

```
1 public class LeaveTriggerHandler {  
2  
3     public static void ifMaleEmployee(List<Leave__c> leaveRequests) {  
4         // Fetch employees related to leave requests  
5         Set<Id> employeeIds = new Set<Id>();  
6         for (Leave__c leaveRequest : leaveRequests) {  
7             if (leaveRequest.Employee__c != null) {  
8  
9                 employeeIds.add(leaveRequest.Employee__c);  
10            }  
11        }  
12  
13        // Fetch employee records  
14        Map<Id, Employee__c> employeesMap = new Map<Id, Employee__c>([SELECT Id, Gender__c FROM Employee__c WHERE Id IN :employeeIds]);  
15  
16        // Check eligibility for maternity leave and gender  
17        for (Leave__c leaveRequest : leaveRequests) {  
18            if (leaveRequest.Leave_Type__c == 'Maternity Leave') {  
19                Employee__c emp = employeesMap.get(leaveRequest.Employee__c);  
20            }  
21        }  
22    }  
23}
```
- Tool Bar:** Logs, Tests, Checkpoints, Query Editor, View State, Progress, Problems (selected).
- Table:** A small table below the toolbar with columns: Name, Line, Problem.