



S.K.P ENGINEERING COLLEGE

Approved by AICTE & Affiliated to Anna University

NH 66, Somasipadi Post, Chinnakangianur, Tiruvannamalai,

Tamil Nadu-606611

DEPARTMENT OF COMPUTER SCIENCE AND ENGINEERING

BACHELOR OF ENGINEERING 2024-2025

FIFTH SEMESTER

PROJECT TITLE: WORKFORCE ADMINISTRATION SOLUTION

Project Created by: Suryanarayanan.V, Swathi.P, Taiba.A, Tamilarasu.M

Project Reviewed by: DR.M.SENTHIL(AP/CSE)

College Code: 5122

Team ID : NM2024TMID09262



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Certified that this is a bonafide record of work done by

Name : Suryanarayanan.V, Swathi.P, Taiba.A, Tamilarasu.M

University Reg No :

Year / Semester : 3 / 5

Branch : CSE

Year : 2024-2025

Staff-in-Charge

Head of the Department

Submitted for the _____

Practical Examination held on____

Internal Examiner

External Examiner



WORKFORCE ADMINISTRATION SOLUTION(DEV)

Project Description:

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

1. Real Time Salesforce Project
2. Data Modelling
3. Creating an Application
4. User Interface Customization
5. Importing bulk amounts of data
6. Security in Salesforce
7. Group Collaboration
8. Reports & Dashboards

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.

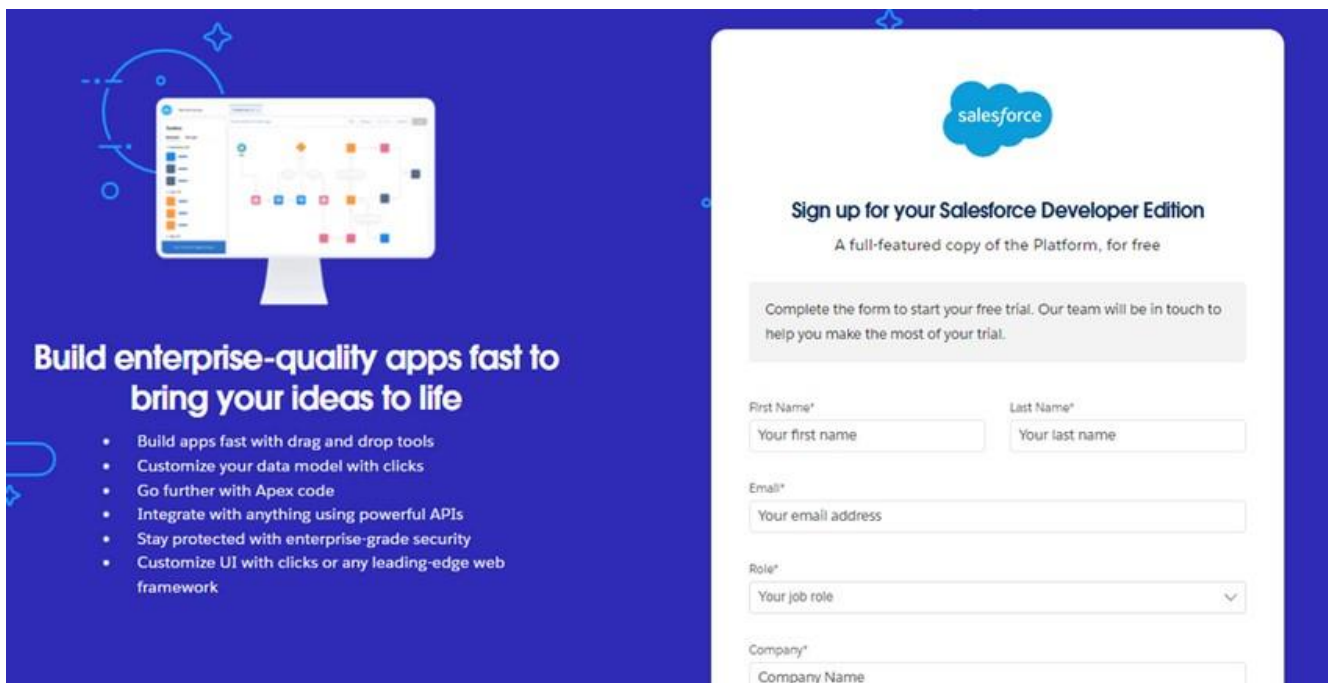
So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3lGde5k>

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 :



Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name* Last Name*

Email*

Role*

Company*

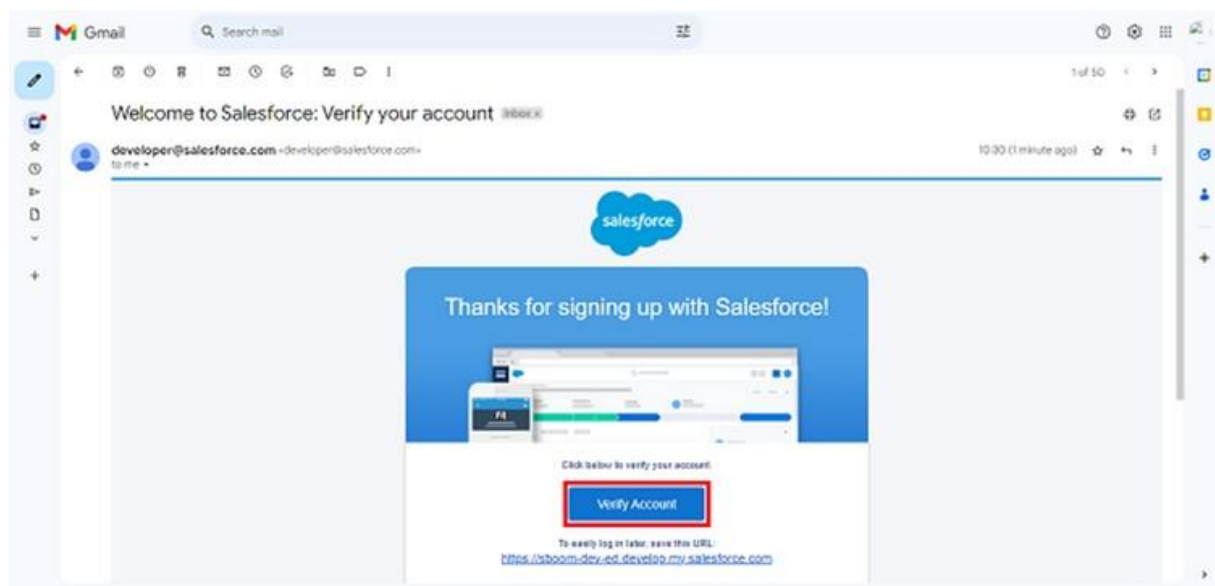
- 1) First name & Last name
- 2) Email
- 3) Role : Developer
- 4) Company : College Name
- 5) County : India
- 6) Postal Code : pin code

7) Username : should be a combination of your name and company8) Click on Sign me up.

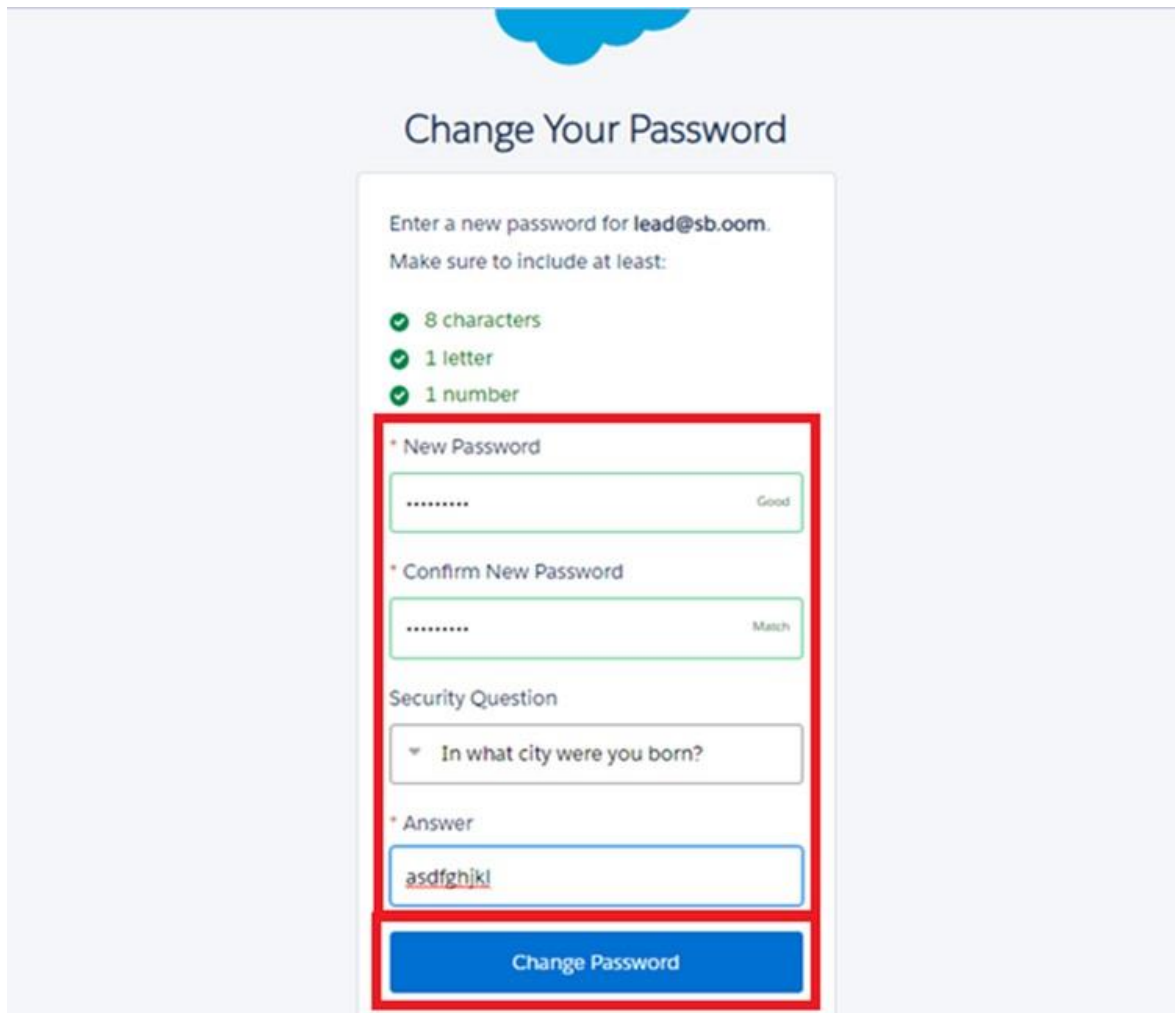
This need not be an actual email id, you can give anything in the format : username@organization.com Click on sign me up after filling these.

Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Clickon the verify account to activate your account. The email may take 510mins.



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



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

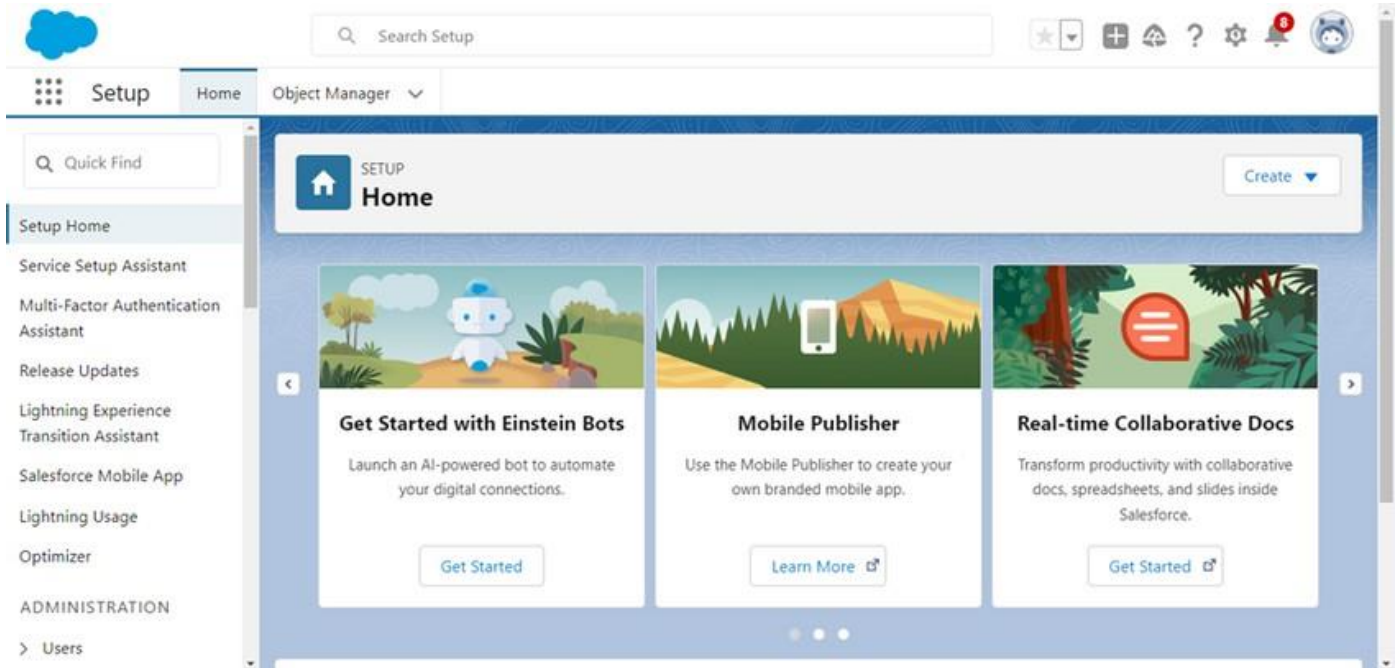
▼ In what city were you born?

* Answer

asdfghjkl

Change Password

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



Object

What Is an Object?

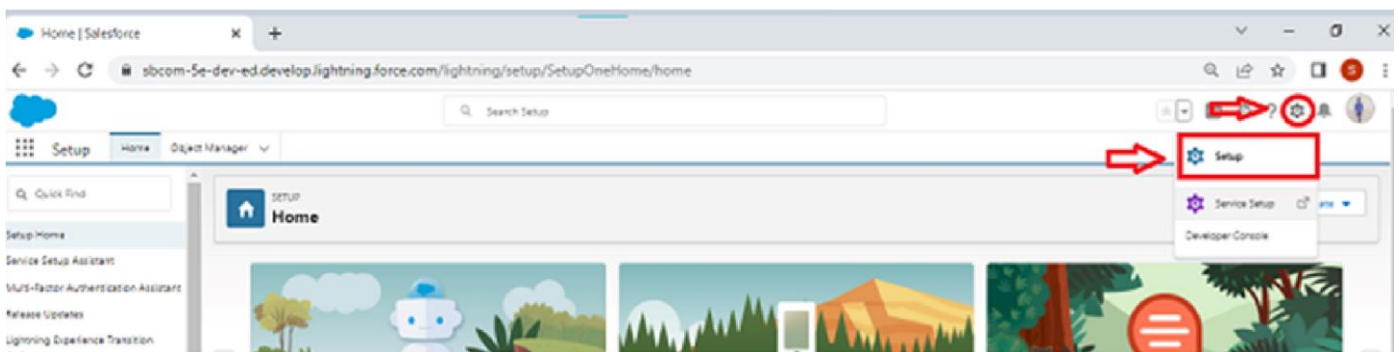
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

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.



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.



- 1) Enter the label name: Employee
- 2) Plural label name: Employees

- 3) Enter Record Name Label and Format

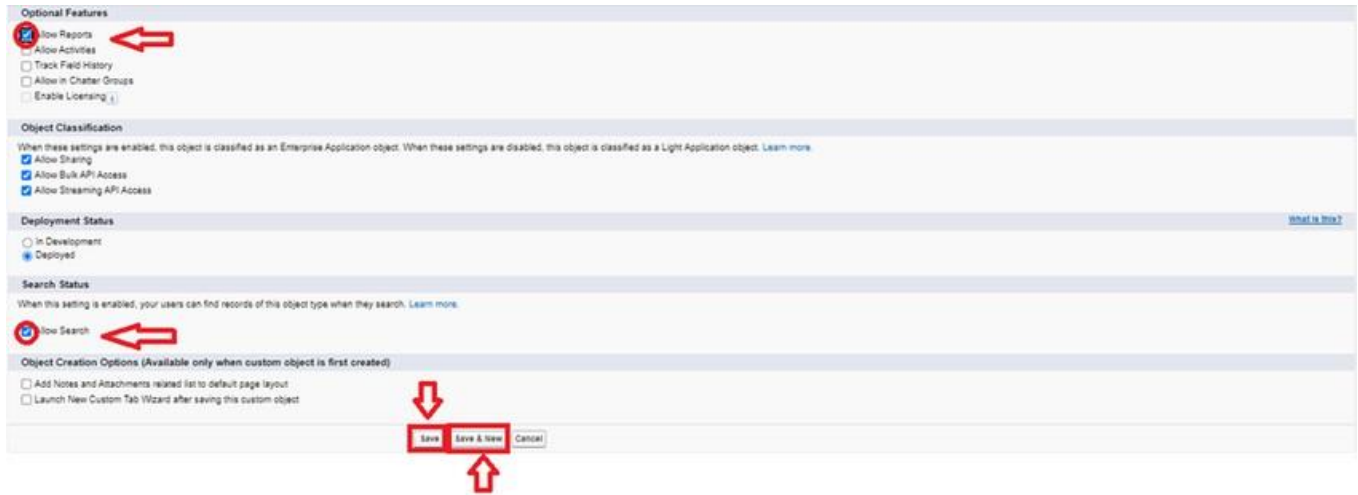
- 1 Record Name : Employee ID
- 2 Data Type : Auto Number
- 3 Display Format : EMS-{0000}
- 4 Starting Number : 1

Enter Record Name Label and Format

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

Record Name	<input type="text" value="Employee Id"/>	Example: Account Name
Data Type	<input type="text" value="Auto Number"/>	
Display Format	<input type="text" value="EMS-{0000}"/>	Example: A-{0000} What is This?
Starting Number	<input type="text" value="1"/>	

1. Click on Allow reports,
2. Allow search --> Save.



Optional Features

- ☒ Allow Reports
- ☒ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing

Object Classification

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

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status

[What is this?](#)

- ☐ In Development
- ☒ Deployed

Search Status

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

- ☒ Allow Search

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

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

Buttons: Save, Save & New, Cancel

Activity 2: Create Project Object

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

1. From the setup page --> Click on Object Manager --> Click on Create --> Click on Custom Object.
 - 1) Enter the label name--> Project
 - 2) Plural label name--> Projects

3) Enter Record Name Label and Format

1 Record Name : Project ID

2 Data Type : Auto Number

3 Display Format : Proj-{0000} 4 Starting Number : 1

2. Click on Allow reports,

3. Allow search --> Save

Activity 3: Create 3 more objects with label names as ProjectTask, Asset, Asset Service.

Note: use “Text” as a data type and label Record Name as “Project Task Name”.

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 (Employee)

To create a Tab:(Employee)

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

Custom Tabs

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

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external content, such as Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation bar. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

[New](#) [What Is This?](#)

No Custom Object Tabs have been defined

Web Tabs

[New](#) [What Is This?](#)

No Web Tabs have been defined

Select Object(Employee) --> Select any tab style --> Next (Add to profiles page) keep it as default --> Next (Add to Custom App) keep it default --> Save.

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

Object:

Tab Style:

(Optional) Choose a Home Page Custom Link:

Splash Page Custom Link:

Enter a short description.

Description

[Next](#) [Cancel](#)

Activity 2: Creating a Custom Tab (Project)

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

Activity 3: Creating tabs for remaining objects

Now create tabs for Project Task, Asset, Asset Service objects.

The Lightning App

The Lightning App

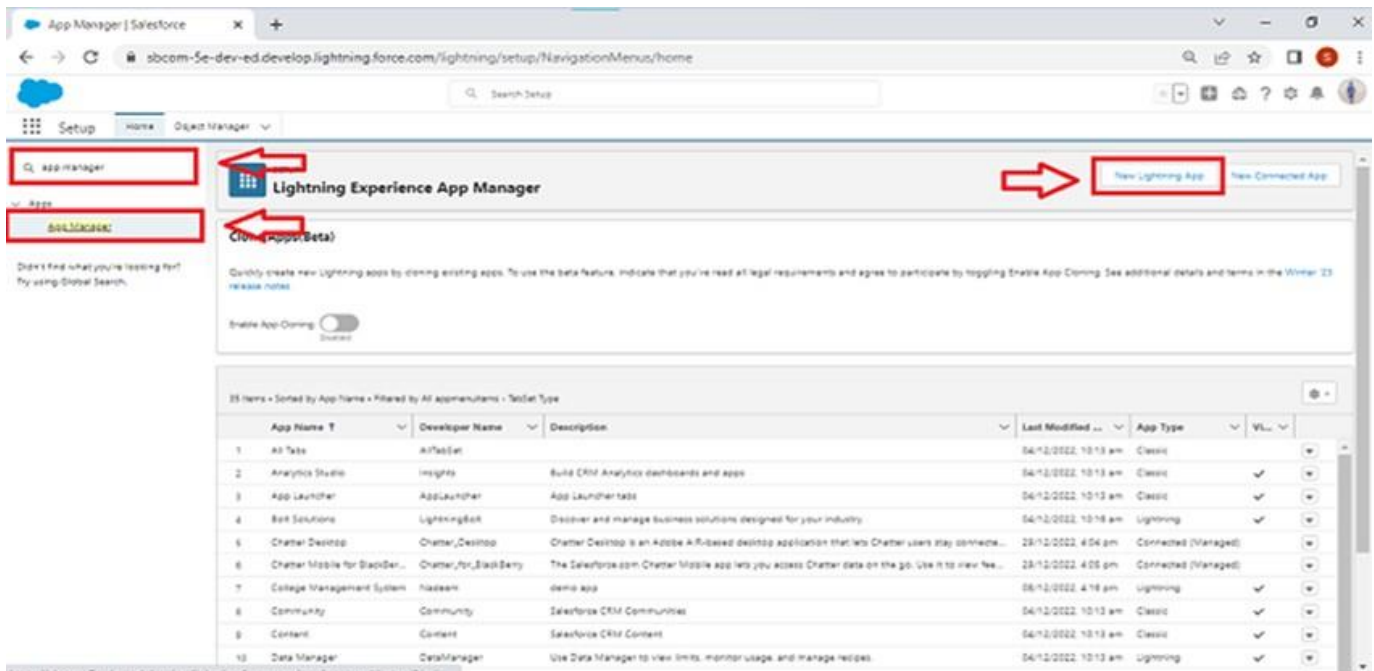
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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.



2. Fill the app name in app details and branding as follow

App Name :

Workforce Administrator Solution **Developer Name**

:

this will auto populated **Description :**

Give a meaningful description **Image :**

optional (if you want to give any image you can otherwise not mandatory) **Primary**

color hex value :

keep this default

3. Then click Next --> (App option page) keep it as default --> Next --> (UtilityItems) keep it as default --> Next.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ

Name your app...

* Developer Name ⓘ

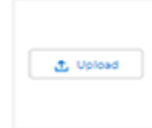
Enter a developer name...

Description ⓘ

Enter a description...

App Branding

Image ⓘ



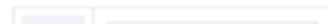
Primary Color Hex Value ⓘ

#0070C2

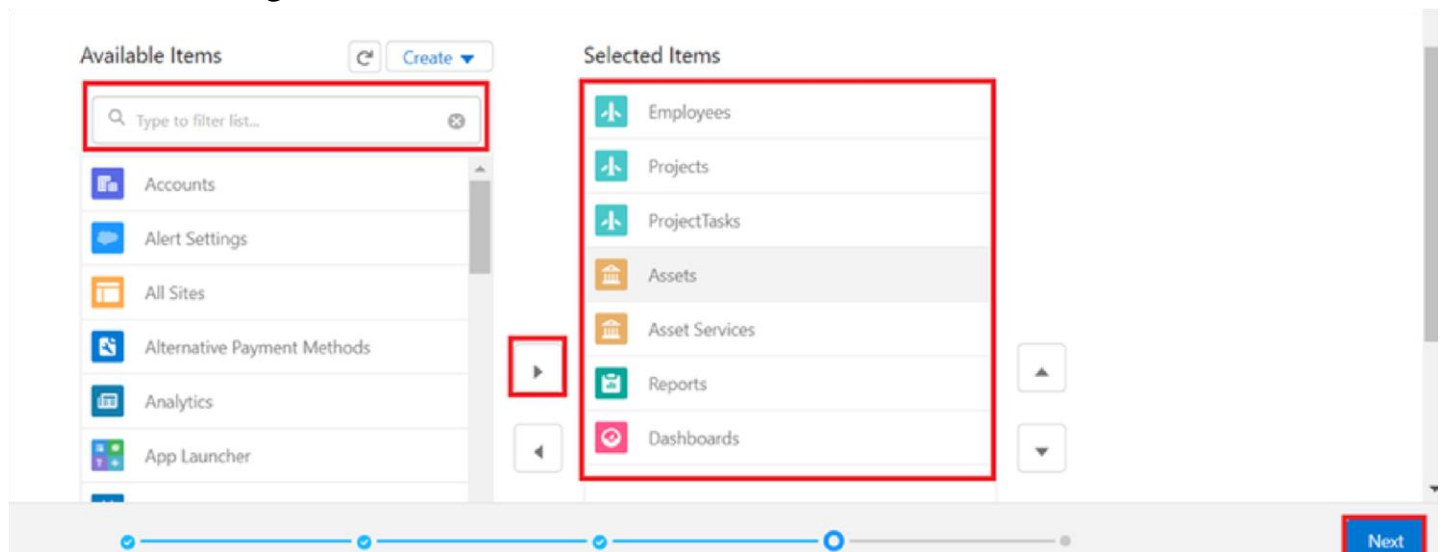
Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview



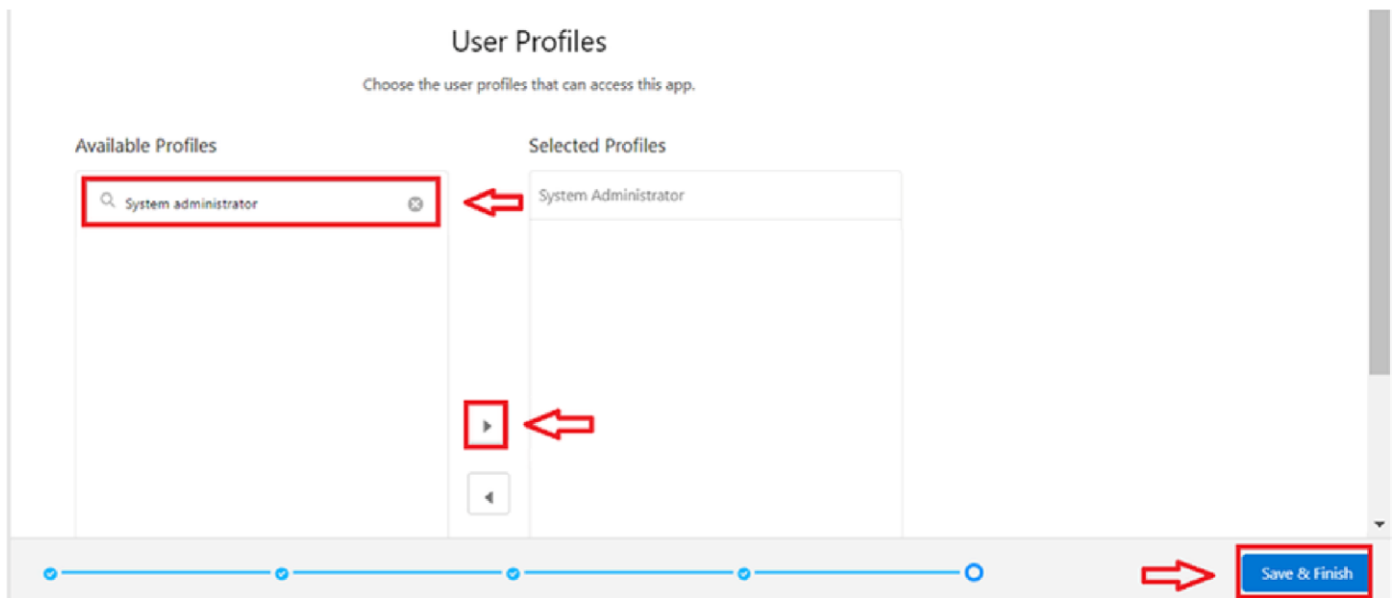
4. To Add Navigation Items:



Search the items in the search bar(Employees, Projects, ProjectTask, Assets, Asset Services, Reports, Dashboard) from the search bar and move it using the arrow button --> Next.

Note: select asset the custom object which we have created in the previous activity.

5. To Add User Profiles:



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

Fields & Relationships

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can hold any valuable information you require for a specific object. Hence, searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Activity 1 : Creating Text Field in Employee Object To create fields in an object:

1. Go to setup --> click on Object Manager --> type object name(Employee) in quickfind bar --> click on the object.

Search Setup

Setup Home **Object Manager** 

Object Manager
1 Items, Sorted by Label

 Schema Builder Create


LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Employee 	Employee_c 	Custom Object		20/06/2023	✓


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

Setup Home **Object Manager**

Employee

Details

Fields & Relationships  4 Items, Sorted by Field Label


Quick Find  **New** Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee ID	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

3. Select Data type as “Text”.

☐ **Picklist** Allows users to select a value from a list you define.

☐ **Picklist (Multi-Select)** Allows users to select multiple values from a list you define.

☒ **Text**  Allows users to enter any combination of letters and numbers.

☐ **Text Area** Allows users to enter up to 255 characters on separate lines.

☐ **Text Area (Long)** Allows users to enter up to 131,072 characters on separate lines.

4. Click on Next

Employee
New Custom Field

Help for this Page ?

Step 2. Enter the details Step 2 of 4

Previous **Next** ~~Cancel~~

Field Label ⓘ

Please enter the maximum length for a text field below.

Length ⓘ

Field Name ⓘ

Description

5. Fill the above as following:

- 1 Field Label: Employee Name
- 2 Length : 18
- 3 Field Name : gets auto generated
- 4 Click on Next --> Next --> Save and new.

Activity 2 : Creating Date of Birth Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Date” and click Next.

<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> 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.
<input checked="" type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> 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.
<input type="radio"/> 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

3. Click on Next.
4. Fill the above as following:
 - a. Field Label: Date of Birth.
 - b. Field Name : gets auto generated.
 - c. Click on Next --> Next --> Save and new.

Activity 3 : Creating Formula Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1 2. Select Data type as “Formula” and click Next.
3. Give Field Label and Field Name as “Age” and select formula return type as “Number” and click next.



Step 2. Choose output type Step 2 of 5

Previous **Next** ←

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

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

Formula Return Type

☐ None Selected 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` ←

4. Under Advanced Formula write down the formula and click “Check Syntax” and Next --> Next --> Save & New.

Step 3. Enter formula Step 3 of 5

Previous **Next** Cancel

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Fahrenheit = 1.8 * Celsius_c + 32 [More Examples](#)

Simple Formula **Advanced Formula**

Insert Field Insert Operator ▼

Age (Number)

YEAR(TODAY()) - YEAR(Date_of_Birth_c)

Check Syntax: No syntax errors in merge fields or functions. (Compiled size: 71 characters)

Description

Quick Tips

- [Getting Started](#)
- [Operators & Functions](#)

Functions

-- All Function Categories --

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Activity 4 : Creating Picklist Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1 2. Select Data type as “Picklist” and click Next.
3. Enter Field Label as “Gender”, under values select “Enter values, with each value separated by a new line” and enter values as shown below.

Step 2. Enter the details Step 2 of 4

Previous **Next** Cancel

Field Label **Gender**

Values

☐ Use global picklist value set

☒ Enter values, with each value separated by a new line

Male
Female

☐ Display values alphabetically, not in the order entered

☐ Use first value as default value

☒ Restrict picklist to the values defined in the value set

Field Name **Gender**

Description

Help Text

4. Click Next --> Next --> Next --> Save & New.

Activity 5 : Creating Self-Relationship Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Lookup Relationship” and click Next.
3. Select Employee from the drop down related to the field and click Next.



4. Give Field Label as “Reports to” and click Next.
5. Next --> Next --> Save & New.

Activity 6 :Creating Master-Detail Relationship between Employee & Asset object

To Create a Master-Detail relationship

1. Go to the setup page --> click on object manager --> type object name in the quick findbar --> click on the object.
2. Click on fields & relationship --> click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. For field label related to: select “Employee” object and click Next.
5. Give Field Label as “Employee Name” and click Next.
6. Next --> Next --> Save & New.

Activity 7 : Creating Remaining Fields in Employee Object

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

Setting OWD :

Setting OWD :

Organization-Wide Defaults, or OWDs, are the pattern security rules that you can follow for your Salesforce instance. Organization Wide Defaults are utilized to confine who can access what information in your CRM. You can award access through different methods that we will discuss later (sharing principles, Role Hierarchy, Sales Teams, and Account groups, manual sharing, and so forth).

Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

- 1 Public Read/Write/Transfer
- 2 Public Read/Write
- 3 Public Read/Only
- 4 Private

Activity 1: Create OWD Setting

1. Go to Set Up --> in the Quick Find box type "Sharing Settings" --> click on it
2. Click Edit in the Organization-Wide Defaults area.

Setup Home Object Manager

Q sharing settings

Security

Sharing Settings

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

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' records, based on an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults [Edit](#)

Object	Default Internal Access	Default External Access
Lead	Public Read/Write/Transfer	Private
Account and Contract	Public Read/Write	Private
Contact	Controlled by Parent	Controlled by Parent
Order	Controlled by Parent	Controlled by Parent
Asset	Controlled by Parent	Controlled by Parent
Opportunity	Public Read/Write	Private

Search for the Employee object.

3. Under default internal access and default external access change the options to “Private” and under grant using hierarchies select check box.

5. Click on save.

Work Type Group	Private	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset	Public Read/Write	Private	Private	<input checked="" type="checkbox"/>
Asset Service	Public Read/Write	Private	Private	<input checked="" type="checkbox"/>
Employee	Private	Private	Private	<input checked="" type="checkbox"/>
Project	Public Read/Write	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>

Other Settings

Standard Report Visibility ☒ Manual User Record Sharing ☐ Manager Groups ☐

Save Cancel

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

Activity - 2

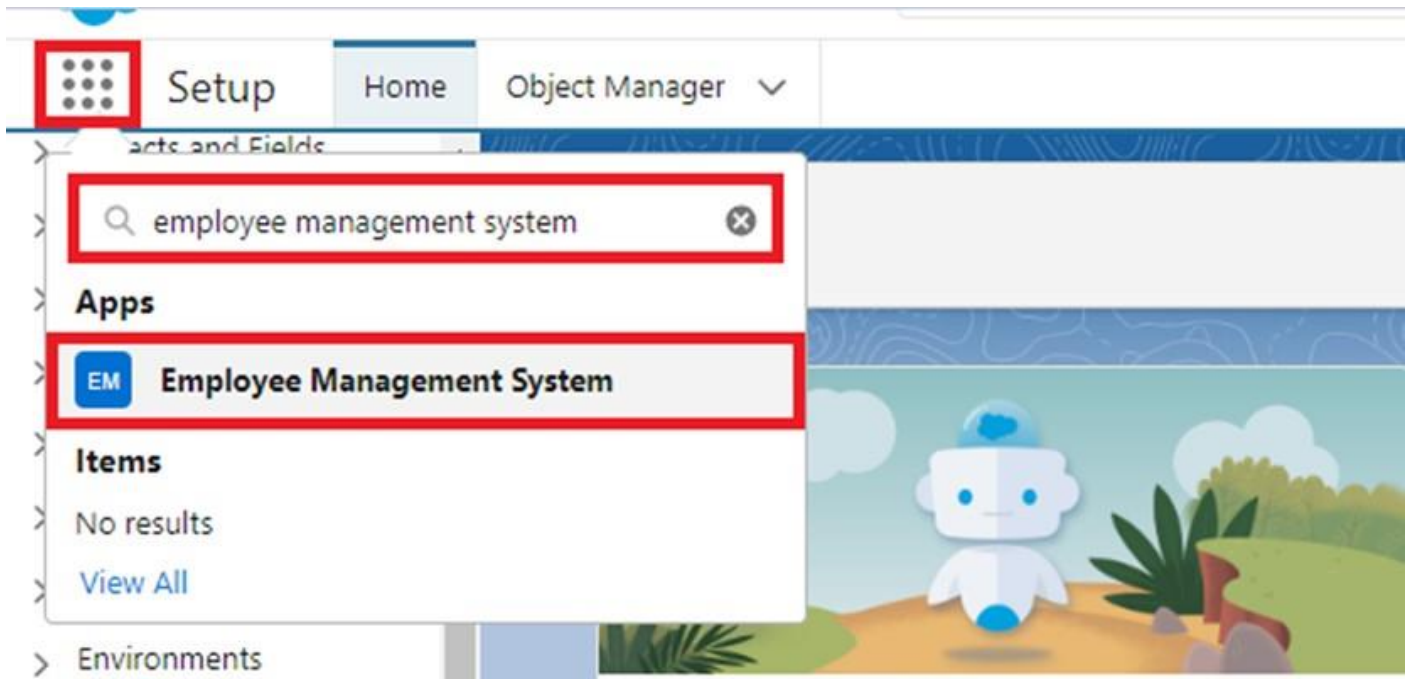
Set OWD as Private for Project and Asset Service objects.

Use Case:

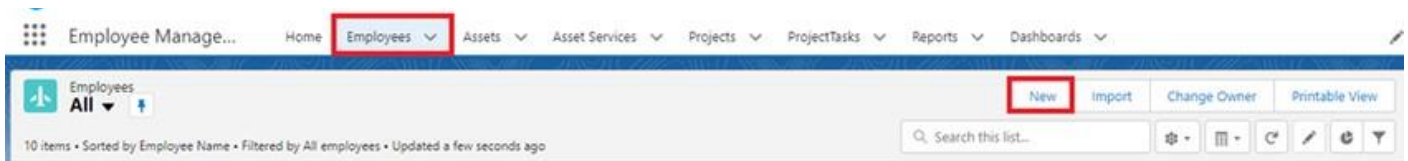
As a new Administrator, you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more. In this unit you will learn about users and how you add users to your Salesforce org.

Activity 1: Create a Record (Employee)

1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.



3. Click on the Employee tab.
4. Click New.



5. Fill the Details and click on Save.

Activity 2: View a Record (Employee) :

1. Click on App Launcher on the left side of the screen.
2. Search Employee Management System & click on it.
3. Click on the Employee Tab.
4. Click on any record name. you can see the details of the Employee

Activity 3: Delete a Record (Employee) :

- 1 .Click on App Launcher on the left side of the screen.
- 2 .Search Employee Management System & click on it.
- 3 .Click on the Employee Tab.
- 4 .Click on Arrow at right hand side on that Particular record.
- 5 .Click delete.

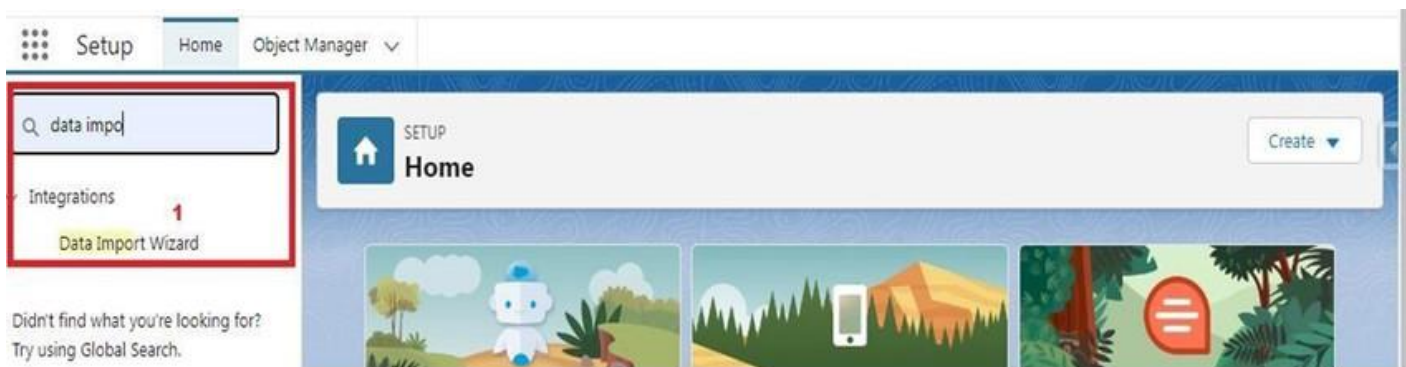
Import Data

NOTE- Before creating the application download this file from the URL given below save the file in CSV.

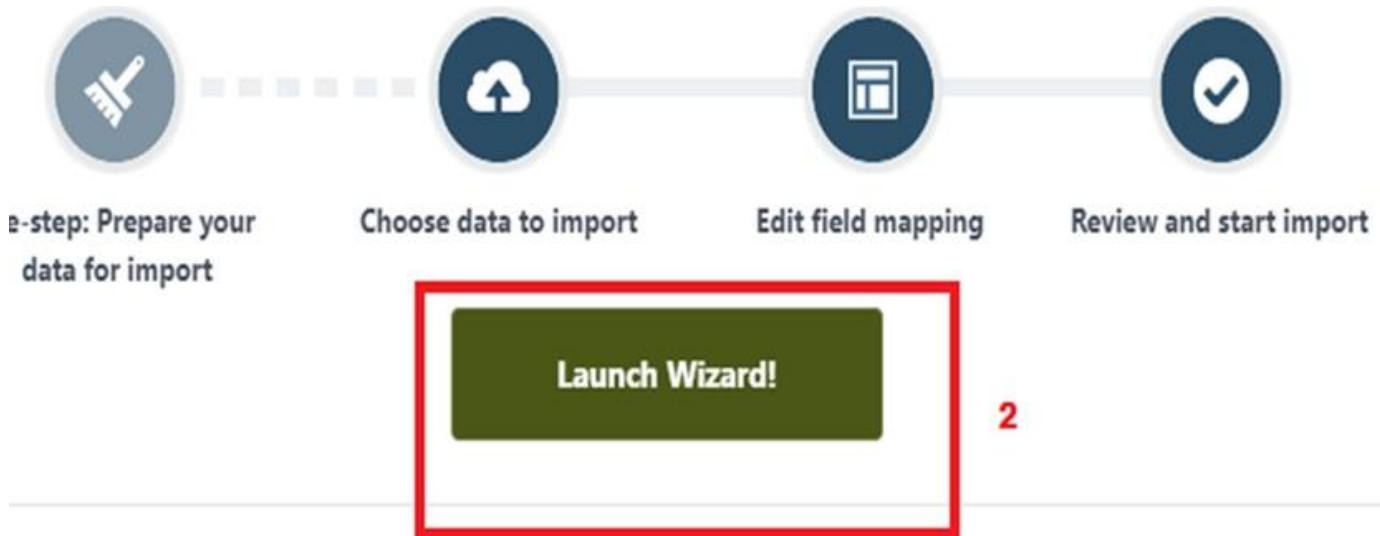
<https://tinyurl.com/SF-Employee-Data>

Activity-1: Importing data using Data Wizard

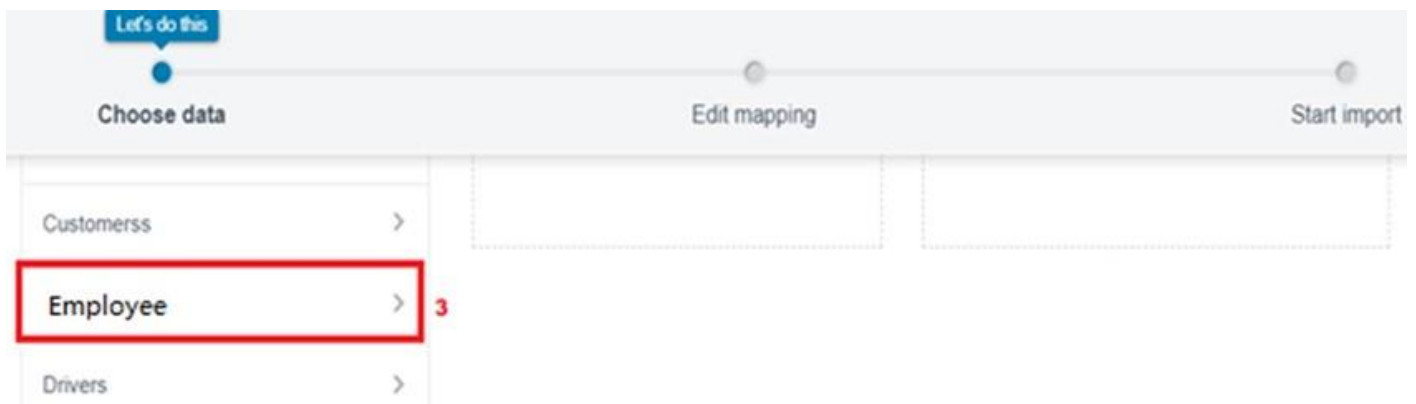
- 1 . From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



3 .Click Launch Wizard!



4 .Click the Custom Objects tab and select the Employee object.



5 .Select Add new records.

Import your Data into Salesforce

You can import up to 50,000 records at a time.

What kind of data are you importing? [?]

What do you want to do? [?]

Where is your data located? [?]

Standard objects	Custom objects	What do you want to do?
		Add new records 4 >
Attendees >		Update existing records >
Buyers >		Add new and update existing records >

6 .Click CSV and choose file Employee_CSV which we made earlier. Click Next.

Choose data

Edit mapping

Start import

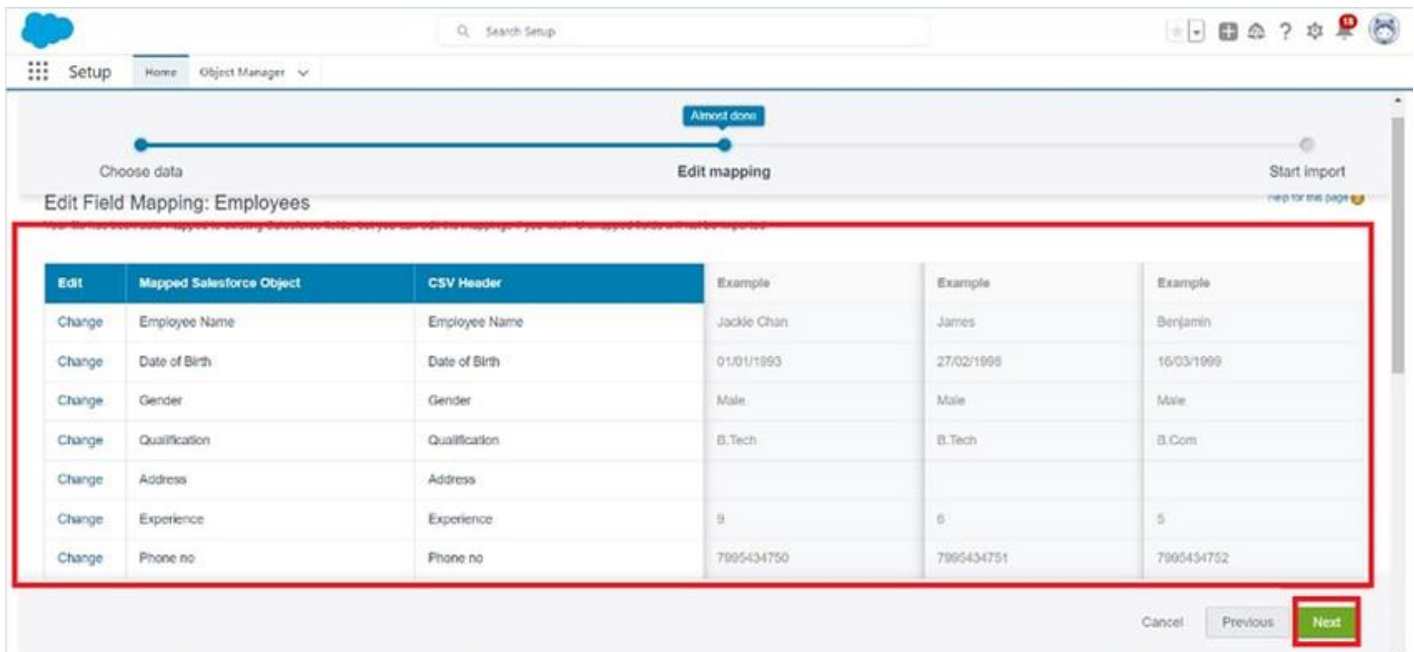
What kind of data are you importing? [?]	What do you want to do? [?]	Where is your data located? [?]
<div>Standard objects</div> <div>Custom objects</div> <div>Attendees ></div> <div>Buyers ></div> <div>Customers ></div> <div>Departments ✓</div>	<div>Add new records ✓</div> <div>Match by: [?]</div> <div>--None--</div> <div>Which User field in your file designates record owners? [?]</div> <div>--None--</div> <div>Trigger workflow rules and processes? [?]</div> <div><input type="checkbox"/> Trigger workflow rules and processes for new and updated records</div>	<div>Drag CSV file here to upload</div> <div> <div>CSV</div> <div>5</div> </div>

Cancel

Previous

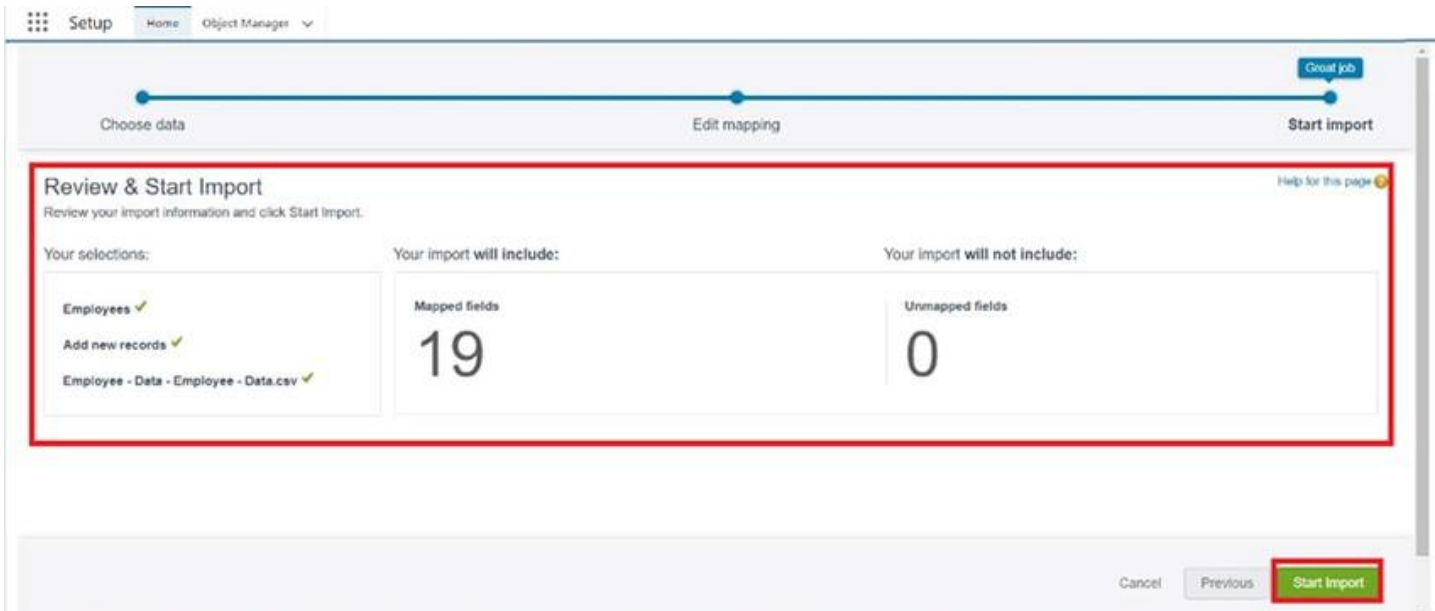
Next

- 7 .Since the field names in the CSV file (CSV Header) are the same as the fieldnames in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.



Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Employee Name	Employee Name	Jackie Chan	James	Benjamin
Change	Date of Birth	Date of Birth	01/01/1993	27/02/1998	16/03/1999
Change	Gender	Gender	Male	Male	Male
Change	Qualification	Qualification	B.Tech	B.Tech	B.Com
Change	Address	Address			
Change	Experience	Experience	8	6	5
Change	Phone no	Phone no	7995434750	7995434751	7995434752

- 8 .The next screen gives you a summary of your data import. Click StartImport.



Review & Start Import

Review your import information and click Start Import.

Your selections:

- Employees ✓
- Add new records ✓
- Employee - Data - Employee - Data.csv ✓

Your import will include:

Mapped fields: 19

Your import will not include:

Unmapped fields: 0

- 9 .Click OK on the popup.

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.



10 .Scroll down the page and verify that your data has been imported underbatches.

Batches										
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count
View Request	View Result	751500000JeYH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	105	60	0	14	0	0
								Completed		

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

Profiles :

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

Activity 1: HR Profile :

To create a new profile:

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Assets and Asset Services objects.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Assets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Asset Services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ProjectTasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Scroll down and Click on Save.

Activity 2: Manager Profile

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (Salesforce Platform User) --> enter profile name (Manager) --> Save.
2. While still on the profile page, then click Edit.
3. Scroll down to Custom Object Permissions and Give access permissions for Employee, Project and Project Task objects.
4. Scroll down and Click on Save.

Activity 3: Create Employee Profile

Create Employee Profiles for “On Site Employee”, “Remote Employee” as in Activity 2, but in step 3 only allow permission access for Project and Project Task objects only.

Role :

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Activity 1: Creating HR Role

1. Go to quick find --> Search for Roles --> click on set up roles.

Setup Home Object Manager

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

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

SETUP Roles

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample

Executive Staff

CEO, President, CFO, VP, Sales

Western Sales Director

Eastern Sales Director

International Sales Director

Western Sales Rep

Eastern Sales Rep

International Sales Rep

Set Up Roles

Don't show this page again

2. Click on Expand All and click on add role under whom this role works.

Your Organization's Role Hierarchy

Collapse All Expand All

Nick Enterprises

Add Role

CEO Edit Del Assign

Add Role

HR Edit Del Assign

Add Role

Manager Edit Del Assign

Add Role

On Site Emp Edit Del Assign

Add Role

Remote Emp Edit Del Assign

Add Role

3. Give Label as "HR" and Role name gets auto populated. Check to whom this role (HR) reports. Then click on Save.

Role Edit New Role

Role Edit

Label

Role Name

This role reports to

CEO

Role Name as displayed on reports

Save

Save & New

Cancel

4. Refer the below diagram to understand which role reports to whole role.

Activity 2: Creating more roles

Create three more roles for Manager, On Site Employee, Remote Employee.

Note: On Site Employee and Remote Employee reports to Manager.

Use case :

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

Activity 1: Create User

1. Go to setup --> type users in quick find box --> select users --> click Newuser.

2. Fill in the fields

1. First Name : Niklaus
2. Last Name : Mikaelson
3. Alias : Give a Alias Name
4. Email id : Give your Personal Email id
5. Username : Username should be in this form: text@text.text
6. Nick Name : Give a Nickname
7. Role : HR
8. User license: Salesforce
9. Profiles : HR

SETUP
Users

New User Help for this Page

User Edit Save Save & New Cancel

General Information Required Information

First Name	Niklaus	Role	HR
Last Name	Mikaelson	User License	Salesforce
Alias	nmika	Profile	HR
Email		Active	<input checked="" type="checkbox"/>
Username	nlarkin@MNwhite.com	Marketing User	<input type="checkbox"/>
Nickname	Niklaus	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None--
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
		Debug Mode	<input type="checkbox"/>

3. Save.

Activity 2: Creating another user

1. Go to setup --> type users in quick find box --> select users --> click New user

.

2. Fill in the fields

1 First Name : Kol

2 Last Name : Mikaelson

3 Alias : Give a Alias Name

4 Email id : Give your Personal Email id

5 Username : Username should be in this form: text@text.text

6 Nick Name : Give a Nickname

7 Role : Manager

8 User license : Salesforce Platform

9 Profiles : Manager

3. Save.

Activity 3: Creating more users

Create two more users as we created in activity 2.

Page layouts

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

Activity 1 : creating a page layout for Employee object

To Create a Page layout:

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

Search Setup

Setup Home **Object Manager**

SETUP **Object Manager** 1 Item, Sorted by Last Modified

Employee Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Employee	Employee__c	Custom Object		31/05/2023	✓

Edit

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

SETUP > OBJECT MANAGER **Employee**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Page Layouts 1 Item, Sorted by Page Layout Name

Q Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Employee Layout	Nick, 28/05/2023, 7:34 pm	Nick, 31/05/2023, 11:21 am

3 .Give Page layout Name as “On Site Employee Layout” and click on Save.

Create New Page Layout

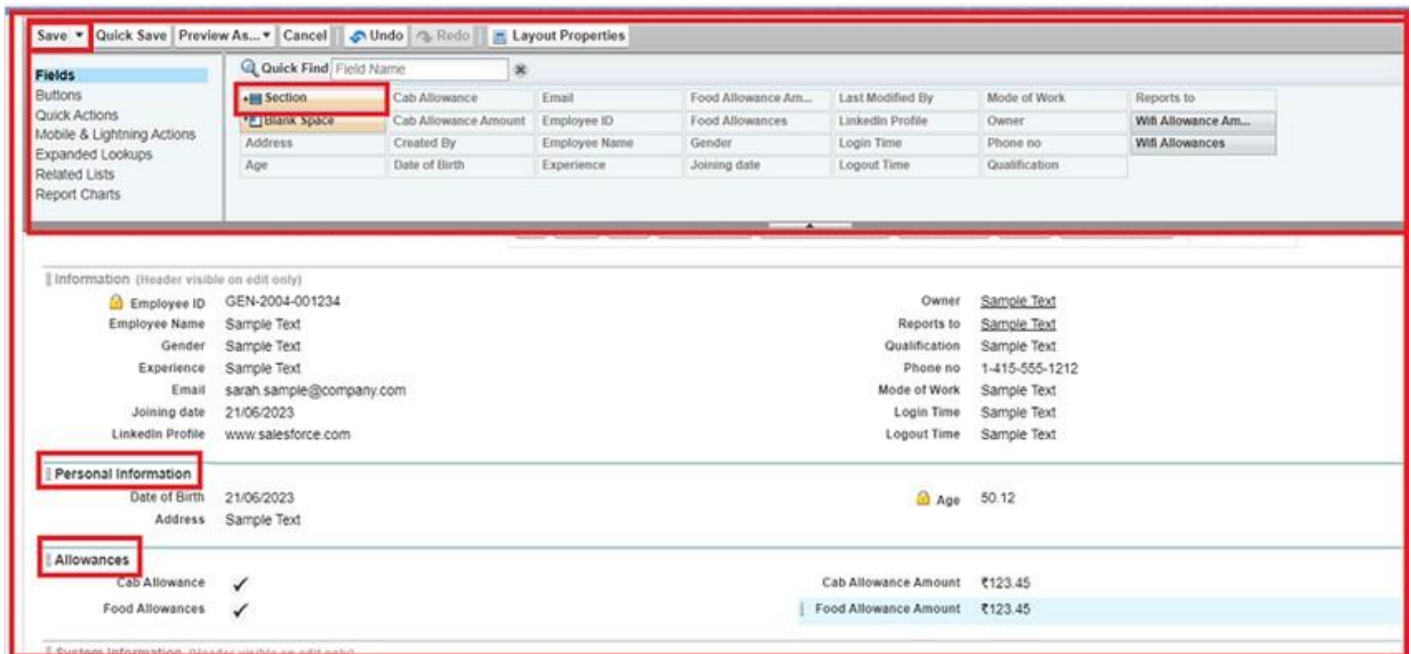
As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the sta

Existing Page Layout Employee Layout

Page Layout Name On Site Employee Layout

Save Cancel

- 4 .Drag and drop the Section from the highlight panel below the Information and name it as “Personal Information” and click Ok.
- 5 .Drag Date of Birth, Address and Age fields from Employee Information to Personal Information section.
- 6 .Similarly perform the above step to create “Allowances” and add allowances fields in it as shown below.



The screenshot shows the Salesforce page layout editor. The 'Fields' panel on the left lists various fields. The main area shows the page layout structure with sections like 'Information', 'Personal Information', and 'Allowances'. The 'Personal Information' section contains fields like Date of Birth, Address, and Age. The 'Allowances' section contains fields like Cab Allowance and Food Allowances.

Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name
Cab Allowance	Email	Food Allowance Am...	Last Modified By	Mode of Work	Reports to	
Cab Allowance Amount	Employee ID	Food Allowances	Linkedin Profile	Owner	Wifi Allowance Am...	
Address	Created By	Employee Name	Gender	Login Time	Phone no	Wifi Allowances
Age	Date of Birth	Experience	Joining date	Logout Time	Qualification	

Information (Header visible on edit only)

Employee ID	GEN-2004-001234	Owner	Sample Text
Employee Name	Sample Text	Reports to	Sample Text
Gender	Sample Text	Qualification	Sample Text
Experience	Sample Text	Phone no	1-415-555-1212
Email	sarah.sample@company.com	Mode of Work	Sample Text
Joining date	21/06/2023	Login Time	Sample Text
Linkedin Profile	www.salesforce.com	Logout Time	Sample Text

Personal Information

Date of Birth	21/06/2023	Age	50.12
Address	Sample Text		

Allowances

Cab Allowance	✓	Cab Allowance Amount	₹123.45
Food Allowances	✓	Food Allowance Amount	₹123.45

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

Activity 2 : Creating another page layout

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

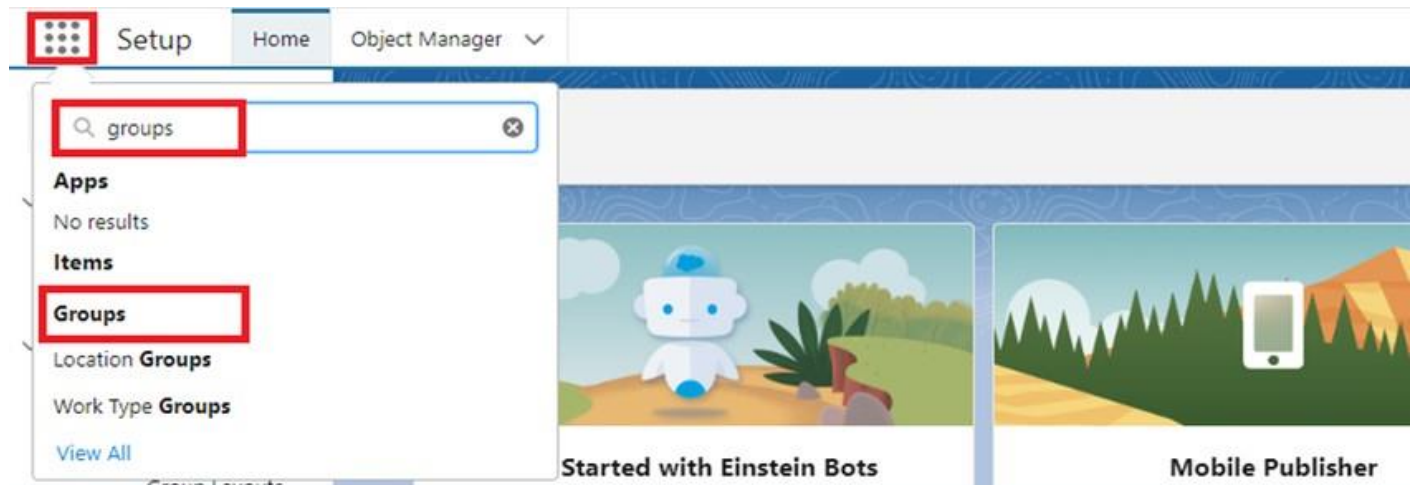
Chatter group

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

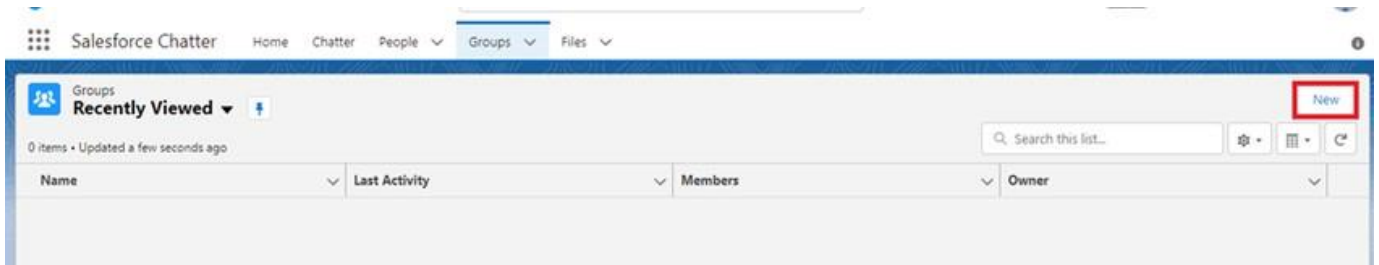
Activity 1 : Creating a chatter group for your organization.

To Create a chatter group:

- 1 .Click the App Launcher.
- 2 .Enter Groups in the Search apps and items... box and select Groups.



- 3 .Click New.



4 .Fill in the new group information with these details:

Field	Value
1.Group 2.Name 3.Description 4.Access Type Allow 5.Customers	Internal Discussion Give a understanding Description on your own Private Checked

Force Chatter Home Chatter

New Group

*Name
Internal Discussion

Description
This is created on the request of COO of the organization, for teams and users to have an internal discussion among them and have a clear idea about the on going activities.

Information
Salesforce Sans 12 B I U S

Cancel Save & Next

hatter Home Chatter

New Group

Group Email

*Owner
Employee Project

Disable automatic archiving
☐

*Access Type
Private


Allow customers
☒

Broadcast Only
☐

Cancel Save & Next

- 5 .Click Save & Next. Skip the Upload Picture section and click Next.
- 7 .On the Manage Members screen, click Add next to users you created in the previous activity.


Manage Members



Jason Mikaelson

×


Member



Elijah Mikaelson

×


Member



Kol Mikaelson

×

Member

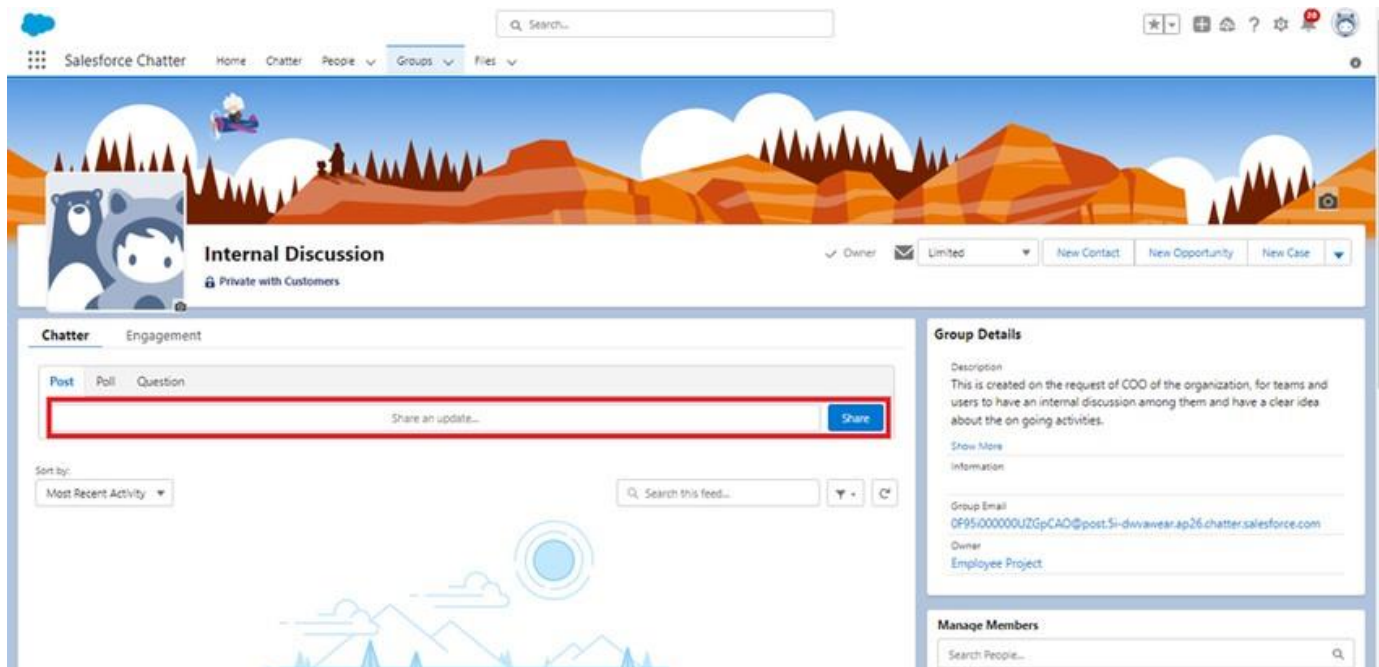


Niklaus Mikaelson

+ Add

Done

7 .Click Done.



8 .This is how your group interface looks like.

9 .Where it says Share an update, post this message to the group: Welcome to the Internal Discussion Group, here you can post anything which is related to ongoing projects.

10 .Click Share.

Note: You can like or comment on this post.

Record types :

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

Activity 1: Creating On Site Employee Record Type To

create a Record Type:

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



The screenshot shows the Salesforce Setup interface. The 'Setup' menu is open, and 'Object Manager' is selected. A search bar at the top right contains the text 'Employee'. Below the search bar, a table lists objects. The 'Employee' object is highlighted, and the 'Edit' button is visible in the right-hand column.

Label	API Name	Type	Description	Last Modified	Deployed
Employee	Employee__c	Custom Object		01/06/2023	✓

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



The screenshot shows the Salesforce Setup interface for the 'Employee' object. The left-hand navigation pane is open, and 'Record Types' is selected. The 'Record Types' section is displayed, showing a table with columns: Record Type Label, Description, Active, and Modified By. The 'New' button is visible in the top right corner of the 'Record Types' section.

Record Type Label	Description	Active	Modified By
No items to display.			

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

New Record Type Employee

[Help for this Page](#)

Step 1. Enter the details

Step 1 of 2

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

Record Type

Required Information

Existing Record Type

--Master--

Record Type Label

On Site Employee

Record Type Name

On_Site_Employee

Description

Active

☒

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>

4. Uncheck for "Make Available".

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter Free User		<input type="checkbox"/>	<input type="checkbox"/>

5. Scroll down and check for the Manager & System Administrator profile and click on Next.

Force.com - Free User	<input type="checkbox"/>	<input type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input type="checkbox"/>
HR	<input type="checkbox"/>	<input type="checkbox"/>
Identity User	<input type="checkbox"/>	<input type="checkbox"/>
Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>	<input type="checkbox"/>
On Site Employee	<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input type="checkbox"/>
Read Only	<input type="checkbox"/>	<input type="checkbox"/>
Remote Employee	<input type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input type="checkbox"/>	<input type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	<input type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work.com Only User	<input type="checkbox"/>	<input type="checkbox"/>

6. Select “Apply a different layout for each profile”, and change page layout to On Site Employee Layout for manager profile and System Administrator.

Employee Record Type On Site Employee

Record Type Name On_Site_Employee

Description

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

☐ Apply one layout to all profiles -- Select Page Layout --

☒ Apply a different layout for each profile

Profile: **Page Layout**

Analytics Cloud Integration User Employee Layout

Analytics Cloud Security User Employee Layout

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

Previous Save & New **Save** Cancel

7. click Save.

Activity 2: Creating "Remote Employee" Record Type

Create another Record Type with name “Remote Employee” following the step from activity 1.

Note: use Remote Employee page layout for Remote Employee record type

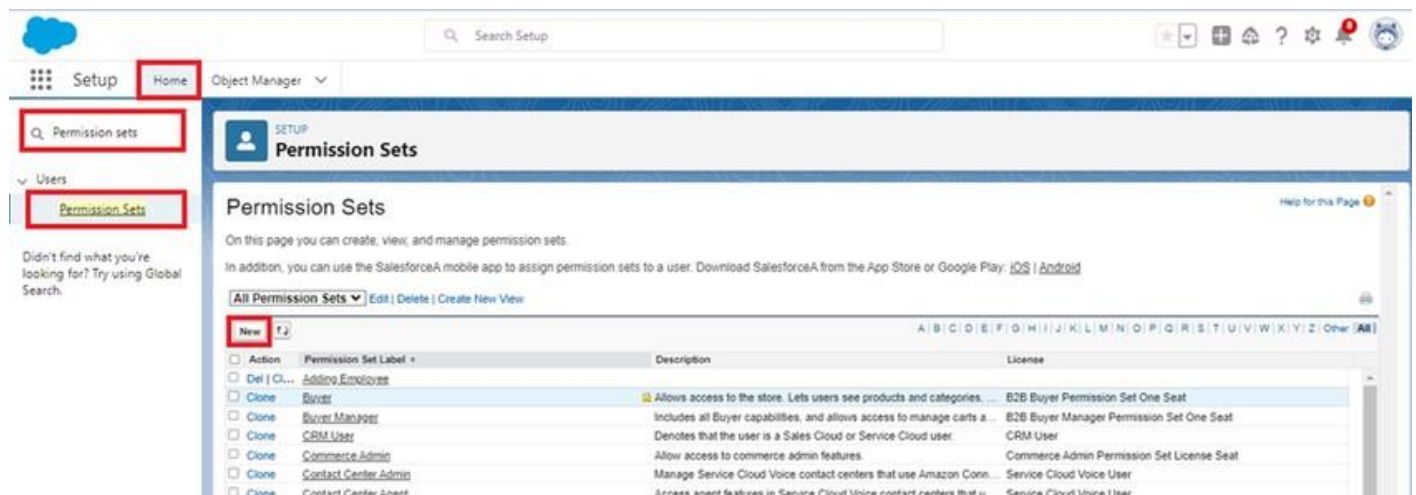
Permission sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

Activity 1: Creating a permission set To

Create a Permission Set:

1. Go to setup --> type “permission sets” in quick search --> select permission sets --> New.



The screenshot shows the Salesforce Setup interface. In the top navigation bar, the 'Setup' tab is selected. Below it, the 'Permission Sets' link is highlighted in the left sidebar. The main content area displays the 'Permission Sets' page, which includes a table of existing permission sets. The table has columns for 'Action', 'Permission Set Label', 'Description', and 'License'.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Action	Permission Set Label	Description	License
<input type="checkbox"/> Del Cl...	Adds Employees		
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and categories.	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User

2. Enter the label name as “Per to Emp” --> Save.

SETUP
Permission Sets

Permission Set
Create

Save Cancel

Enter permission set information

Label Per to Emp

API Name Per_to_Emp

Description

Session Activation Required ☐

3. Under Apps Select object settings.

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

Named Credential Access
Permissions to authenticate against named credentials

Custom Permissions
Permissions to access custom processes and apps

Custom Metadata Types
Permissions to access custom metadata types

Custom Setting Definitions
Permissions to access custom settings

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

- Click on Employee object --> click on Edit --> under object permission check for read and create.

Permission Set

Adding Employee

Find Settings... * | Clone Edit Properties Manage Assignments

Permission Set Overview > Object Settings ▼ Employees ▼

Employees

Save Cancel

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 1

Employee: Record Type Assignments

Record Types	Assigned Record Types
On Site Employee	<input checked="" type="checkbox"/>
Remote Employee	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

- Click on Save.

- After saving the permission click on the Manage assignment

SETUP
Permission Sets

Permission Set
Adding Employee

Find Settings... | Clone | Edit Properties | **Manage Assignments**

Permission Set Overview > Object Settings ▾ Employees ▾

Employees Edit

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

7. Now click on the Manage Assignment.

Setup Home Object Manager ▾

Q permission

Users
Permission Set Groups
Permission Sets
Custom Code
Custom Permissions

... > SETUP > PERMISSION SET 'ADDING EMPLOYEE'
Adding Employee

Current Assignments **Add Assignment**








8. Click on Add Assignment.

Select Users to Assign

All Users ▾

1 item selected

Search this list...

	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	 Chatter Expert	Chatter	chatty.00d5i00000ewzcbca5.165fc3eew2or@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	 demo project	dproj	nadeem@smart.com		<input checked="" type="checkbox"/>	System Administrator
<input checked="" type="checkbox"/>	 Elijah Mikaelson	emika	elijah@smart.com	On Site Employee	<input checked="" type="checkbox"/>	On Site Employee
<input type="checkbox"/>	 Integration User	integ	integration@00d5i00000ewzcbca5.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	 Jason Mikaelson	jmika	jason@smart.com	Remote Employee	<input checked="" type="checkbox"/>	Remote Employee
<input type="checkbox"/>	 Kol Mikaelson	kmika	kol@smart.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	 Niklaus Mikaelson	nmika	nikmik@smart.com	HR	<input checked="" type="checkbox"/>	HR

Cancel Next

9. Now select the users(any one user with the profile “On Site Employee”) and click on Next.

10. Click on Assign 11. Click on Done.

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

Types of Reports in Salesforce

1. Tabular
2. Summary

3. Matrix

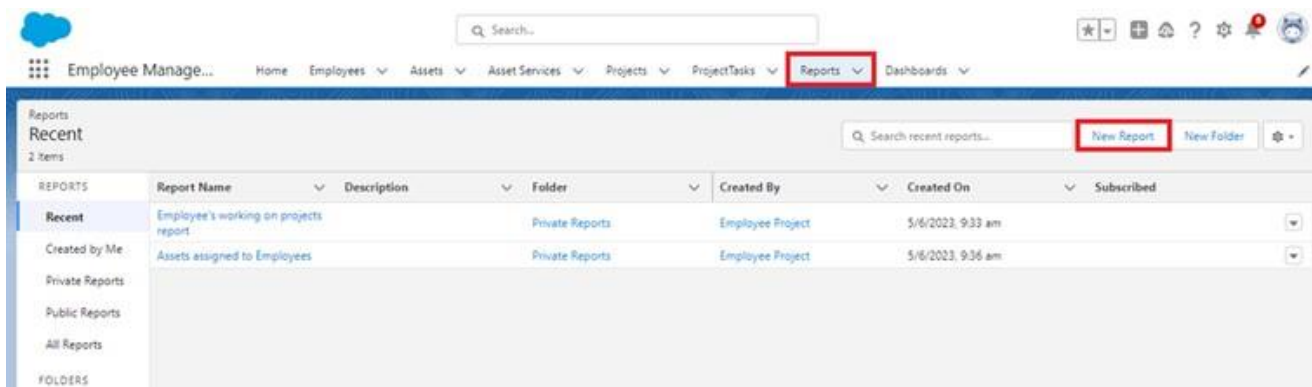
4. Joined Reports

Activity 1: Create Report

To Create a 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.

Create Report

Category
 Recently Used
All
 Accounts & Contacts
 Opportunities
 Customer Support Reports
 Leads
 Campaigns
 Activities
 Contracts and Orders
 Price Books, Products and Assets

Select a Report Type

Report Type Name	Category
Activities with Employees	Standard
Employees	Standard
Employees with Reports to	Standard
Employees with ProjectTasks and Projects	Standard
Employee History	Standard
Assets with Employee Name	Standard
Projects with ProjectTasks and Employees	Standard

Details
Employees
 Standard Report Type

 Details Fields (26)
 Created By You
 No Reports Yet
 Created By Others
 No Reports Yet
 Objects Used in Report Type
 Owner

4. Customize your report

--> Add fields from left pane as shown below

Employee Manage...

Home Employees Assets Asset Services Projects ProjectTasks **Reports** Dashboards

REPORT
 New Employees Report Employees

Previewing a limited number of records. Run the report to see everything.

Employee: Employee Name	Employee ID	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
Employee	A00500000HVF0	-	-	-	-	https://linkedin
Emp for Junction test	A00500000HVF0	-	8:00 am	5:00 pm	-	https://linkedin

Outline Filters
 Groups
 Add group...
 Columns
 Add column...
 Employee: Employee Name
 Employee ID
 Reports to
 Login Time
 Logout Time
 Mode of Work
 LinkedIn Profile

5. Save or run it.

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

Activity 2: Create 2 more Report

1. Create a report with report type: “Employees with ProjectTasks andProjects”.
2. Create a report with report type: “Employees with Assets”.

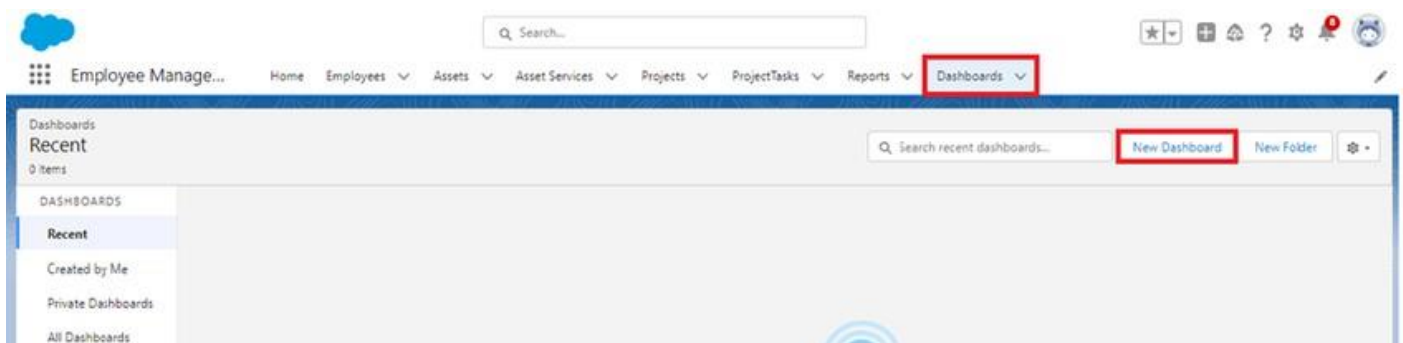
Dashboards

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 quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Activity 1: Create Dashboard

To Create a Dashboard

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



2. Give a Name and click on Create.

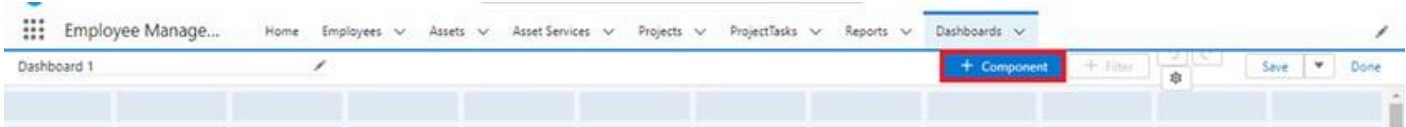
New Dashboard

* Name

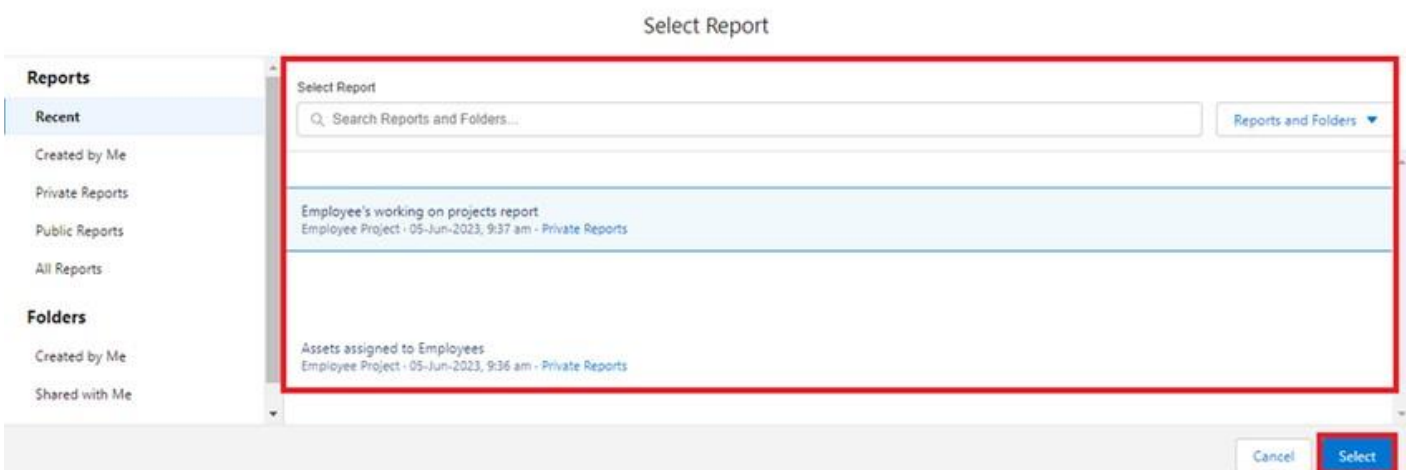
Description

Folder

3. Select add component.



4. Select a Report and click on select.



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

Activity 2:

Create another Dashboard as we discussed in activity 1.

Approval Process Use

Case:

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

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

Activity - 1

Prerequisites:

Create the leave object with the following fields.

Object	Fields	Datatype
Leave	Employee NameNo. of DaysSubjectDescr iptionStatu	Lookup with Employee object Number Text Text Area(Rich) Picklist: values as follows
	Leave	Submitted Approved Rejected

Create the tab for the leave object.

Activity - 2

Create an Approval Process for Leave object.

- 2 .In the Manage Approval Processes For list, select Leave.
- 3 .Click Create New Approval Process and select Use Jump Start Wizard.
- 4 .Enter the following parameters

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

5 .Click Save.

6 .Click View Approval Process Detail Page.

Activity - 3

Initial Submission Action:

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

2 .Give name as “Approval Status to Submitted”.Select Status for the field to update.

Under specify new field value select “A specific value” and select submitted and click Save.

Activity - 4

Approval Steps:

1 .While you are still on Leave Approval Request detail page,Under approval steps click the new approval step.

2 .Give the name as “Approval from HR” and click on next.

3 .Under specify step criteria select “Enter this step if the following (Criteria aremet)”,

Select field : “Leave: No. of Days”,

Operator : equal

Value : 5

4 .Click next

5 .Under select approver : select Automatically assign to approver(s) and forusers select the name of the user with the HR role.

6 .Click on Save.

7 .No, I'll do this later. Take me to the approval process detail page to review what I've just created and click Go.

Activity - 5

Final Approval Action:

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

Give name as “Approval Status to Approved”

2 .Select Status for the field to update.

Under specify new field value select “A specific value” and select Approved and click Save.

Activity - 6

Final Rejection Action:

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

2 .Give name as “Approval Status to Rejected”.

Select Status for the field to update.

Under specify new field value select “A specific value” and select Rejected and click Save.

Apex Trigger Use

Case:

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

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

Activity 1 : Create an Apex Trigger

Create an Apex Trigger

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

:

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

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

3 .Click Submit.

4 .Now write the code logic here

Code Snippet:

```
trigger EmpInsert on Employee__c (before insert) {
```

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

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

Activity 2 : Testing the Trigger

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

Conclusion:

The Salesforce Administration Solution(dev) project has met its objectives delivering a more efficient and user friendly Salesforce environment with continue optimization and stackholder engagement,these solutions will drive long term value for the organization.