S.K.P ENGINEERING COLLEGE

Approved by AICTE & Affiliated to Anna University

NH 66, Somasipadi Post,Chinnakangiyanur, 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

Smart Internz

SMARTBRIDGE Let's Bridge the Gap a Veranda Enterprise | salesforce PARTNER

S.K.P ENGINEERING COLLEGE

Approved by AICTE & Affiliated to Anna University

DEPARTMENT OF COMPUTER SCIENCE AND ENGINEERING

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**

Smart Internz

SMARTBRIDGE
Let's Bridge the Gap
a Veranda Enterprise

salesforce PARTNER

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.

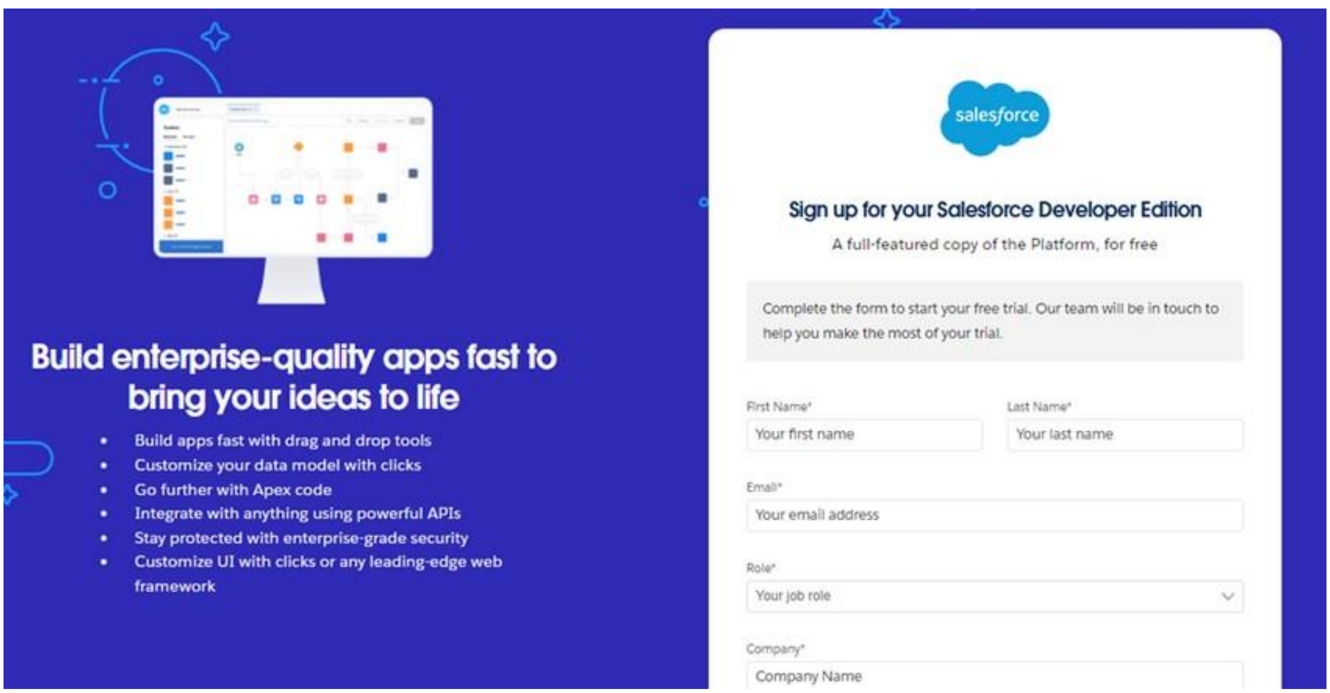
So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:
https://youtu.be/r9EX3lGde5k

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 :



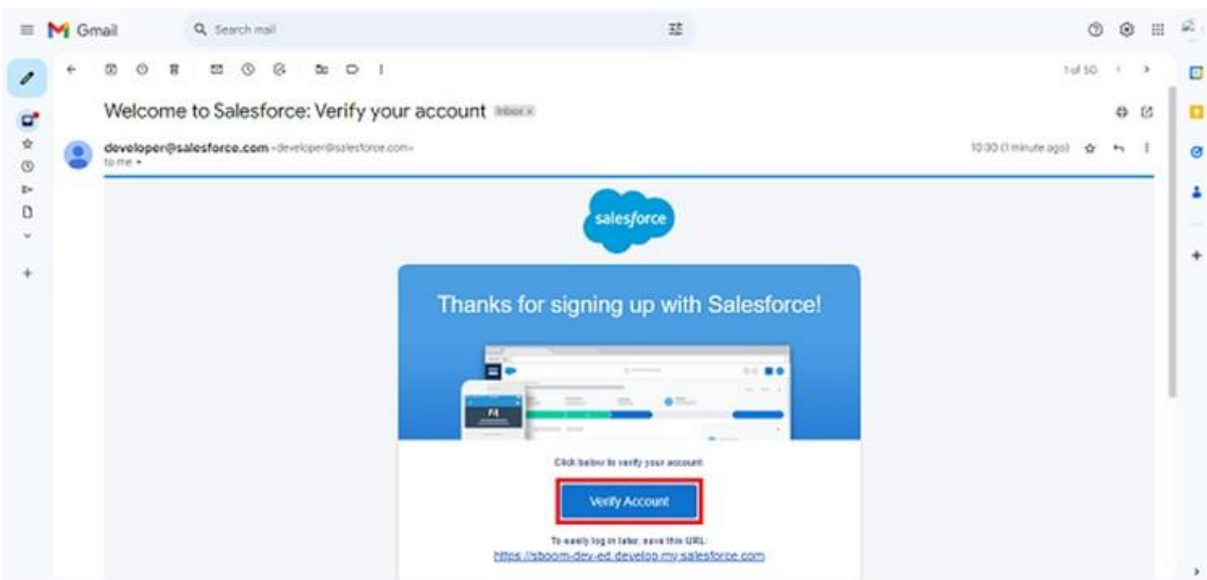
1) First name & Last name
2) Email
3) Role : Developer
4) Company : College Name
5) County : India
6) Postal Code : pin code

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

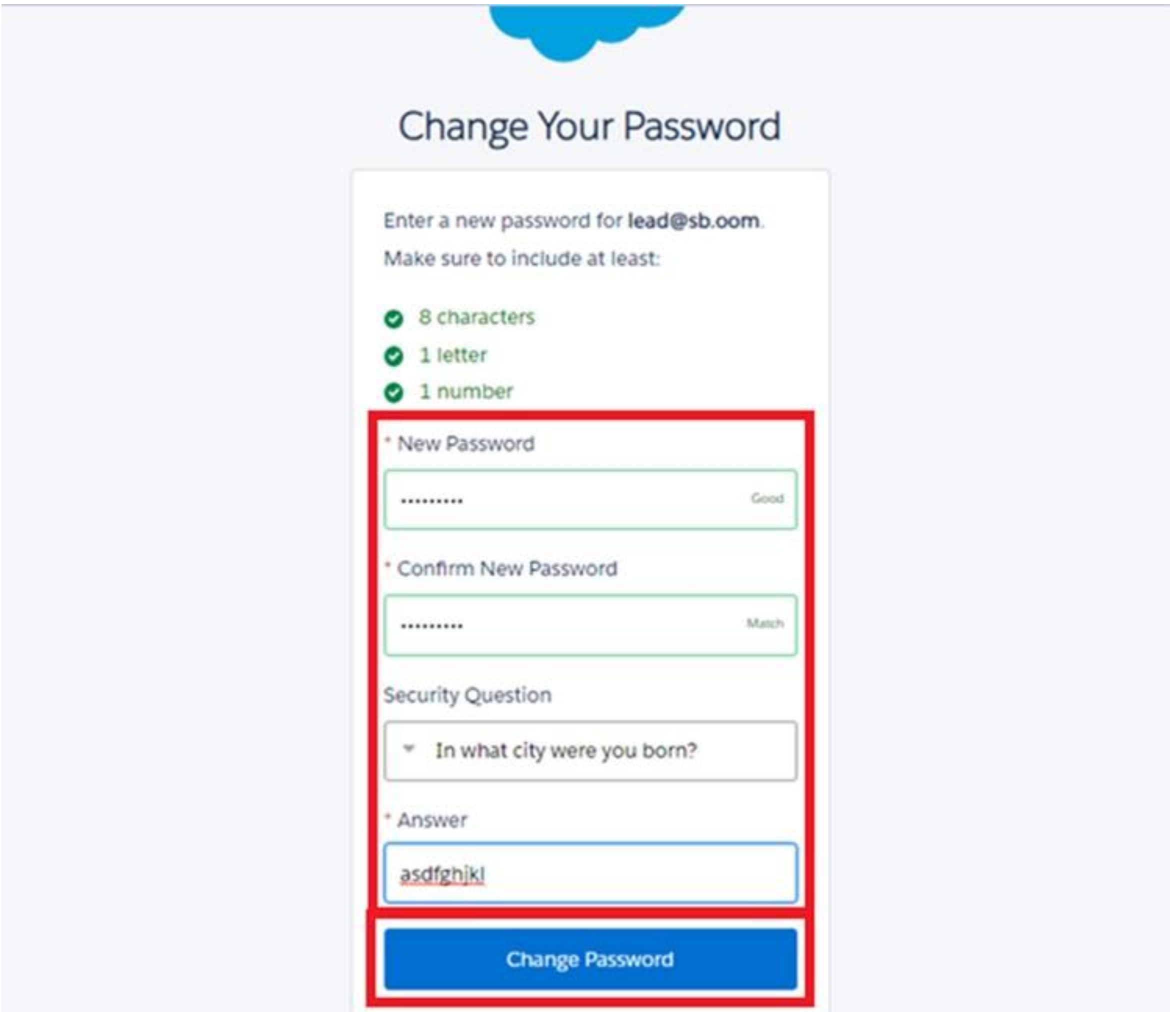
This need not be an actual email id, you can give anything in the format : username@organization.com Click on sign me up after filling these.

Activity 2: Account Activation

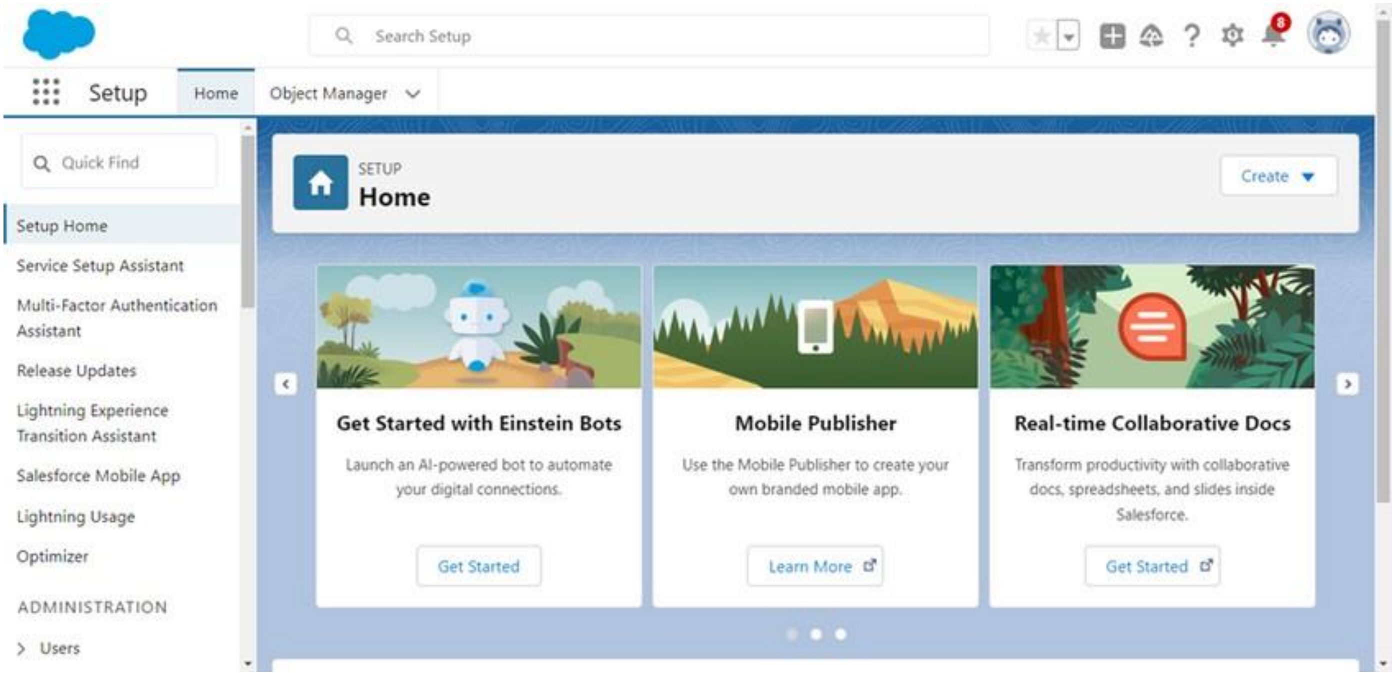
1. Go to the inbox of the email that you used while signing up. Clickon the verify account to activate your account. The email may take 510mins.



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



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



Object

What Is an Object?

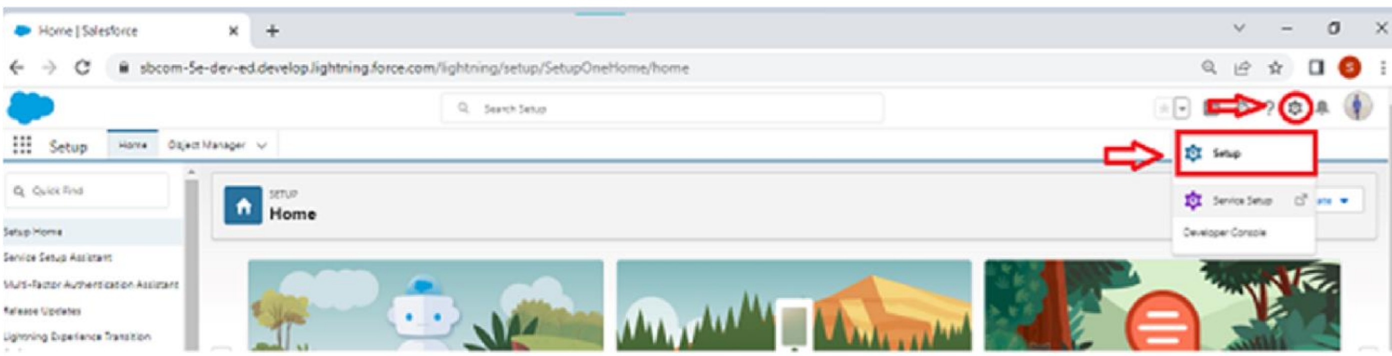
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

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 byusers. 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.

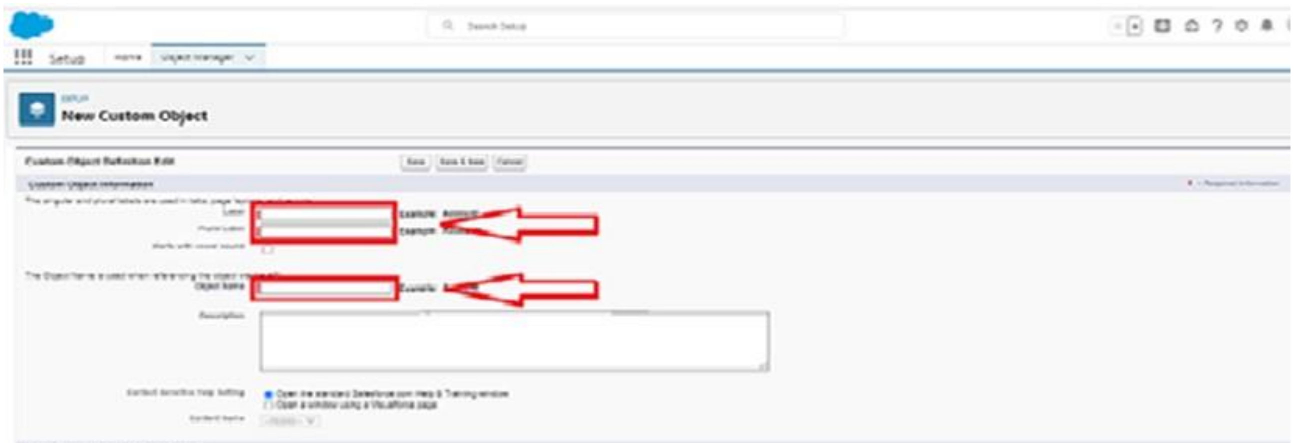


Activity 1: Create Employee Object To

create an object:

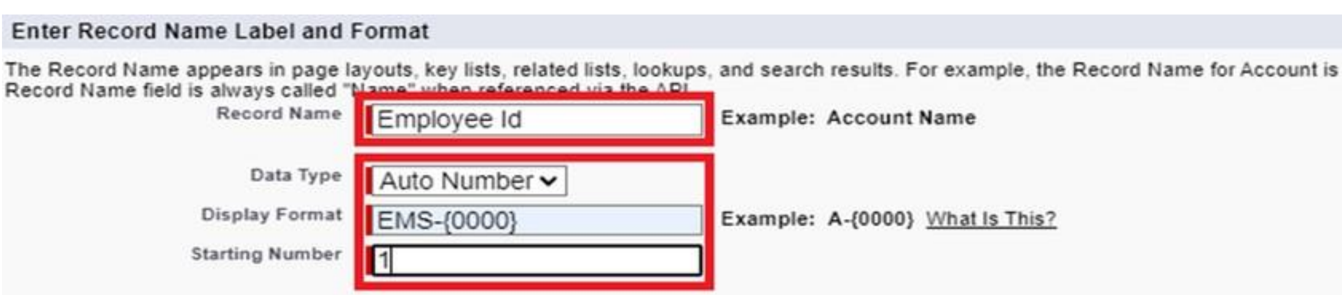
1.From the setup page --> Click on Object Manager --> Click on Create --> Click on Custom Object.

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



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

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 --> Clickon 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

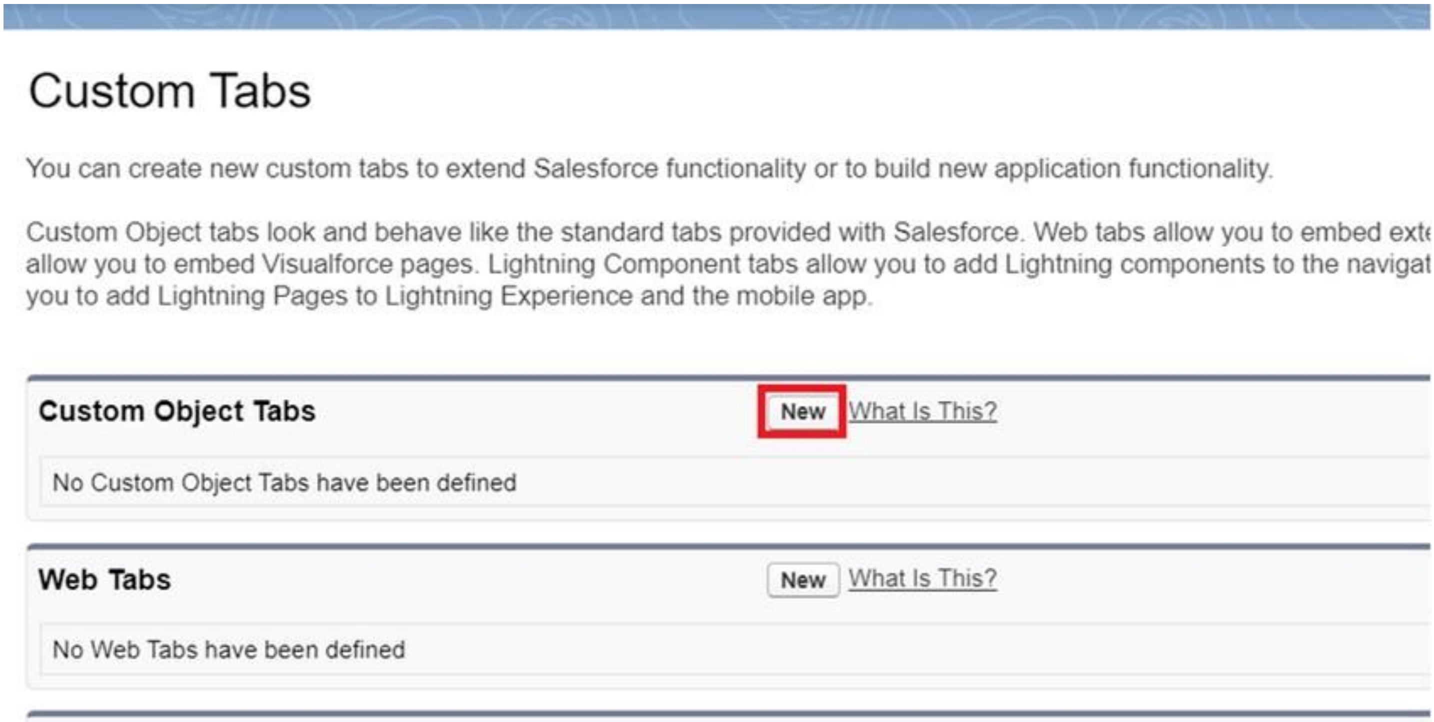
Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu. Lightning

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.

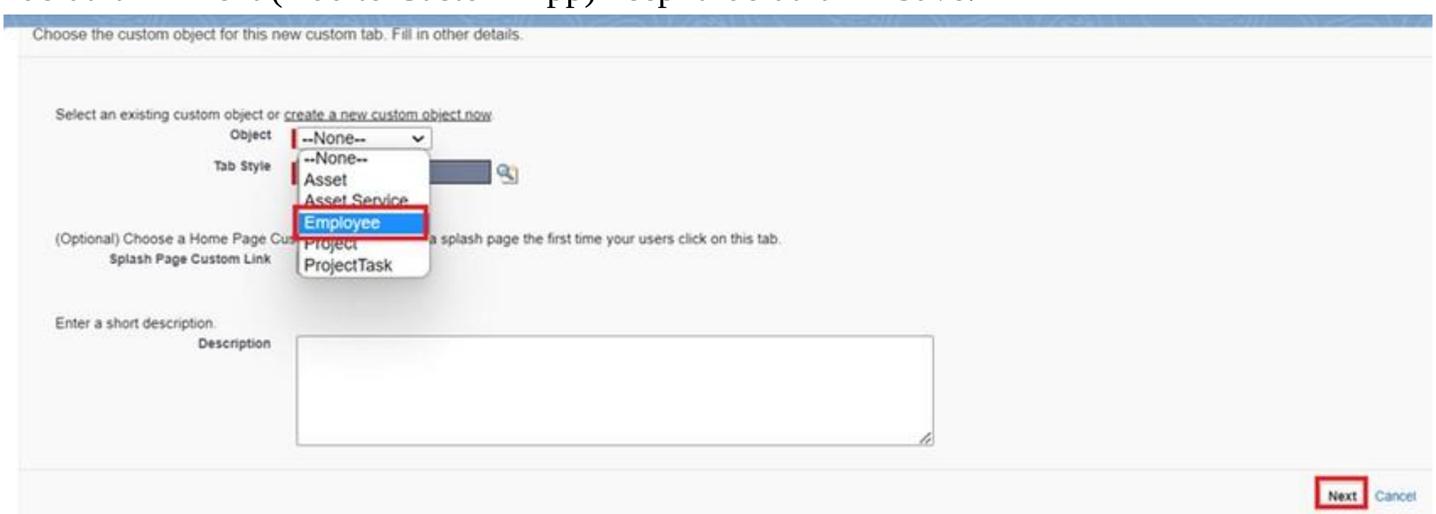
Activity 1: Creating a Custom Tab (Employee)

To create a Tab:(Employee)

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



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.



Activity 2: Creating a Custom Tab (Project)

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

2. Select Object(Project) --> Select the tab style ?--> Next (Add to profiles page) keepit 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

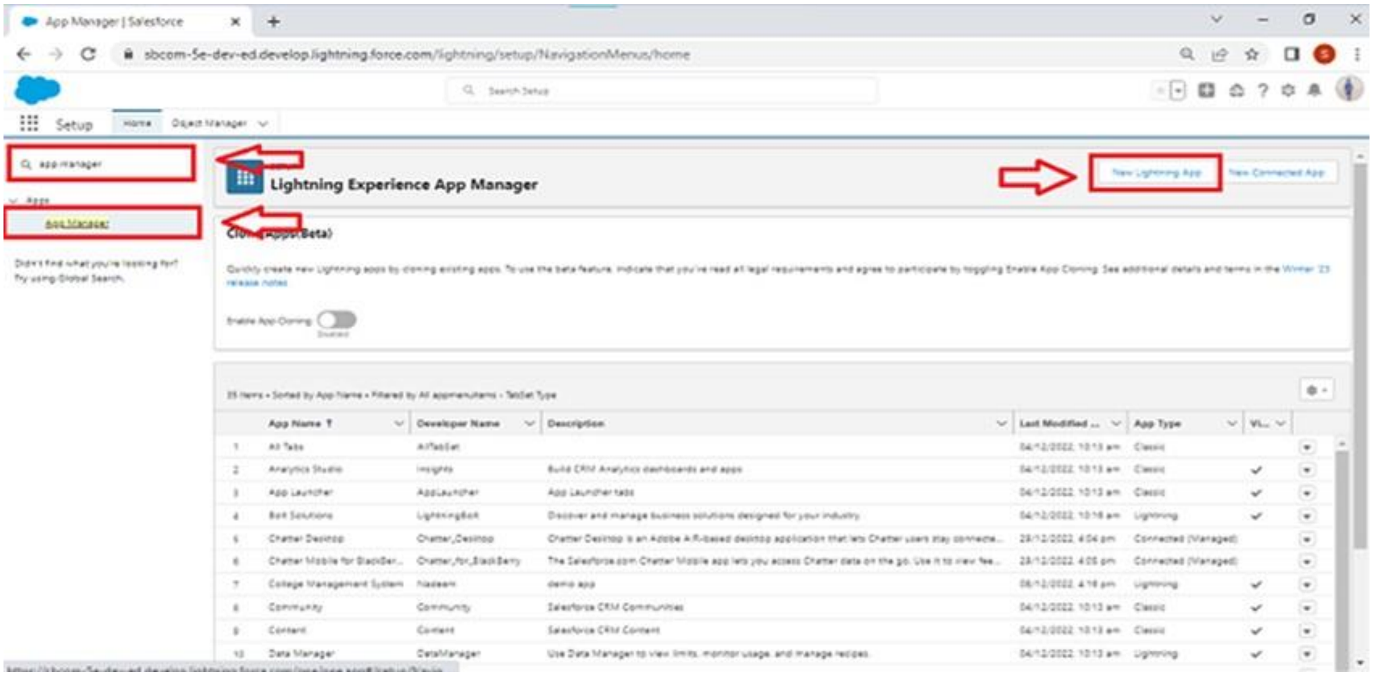
The Lightning App

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:

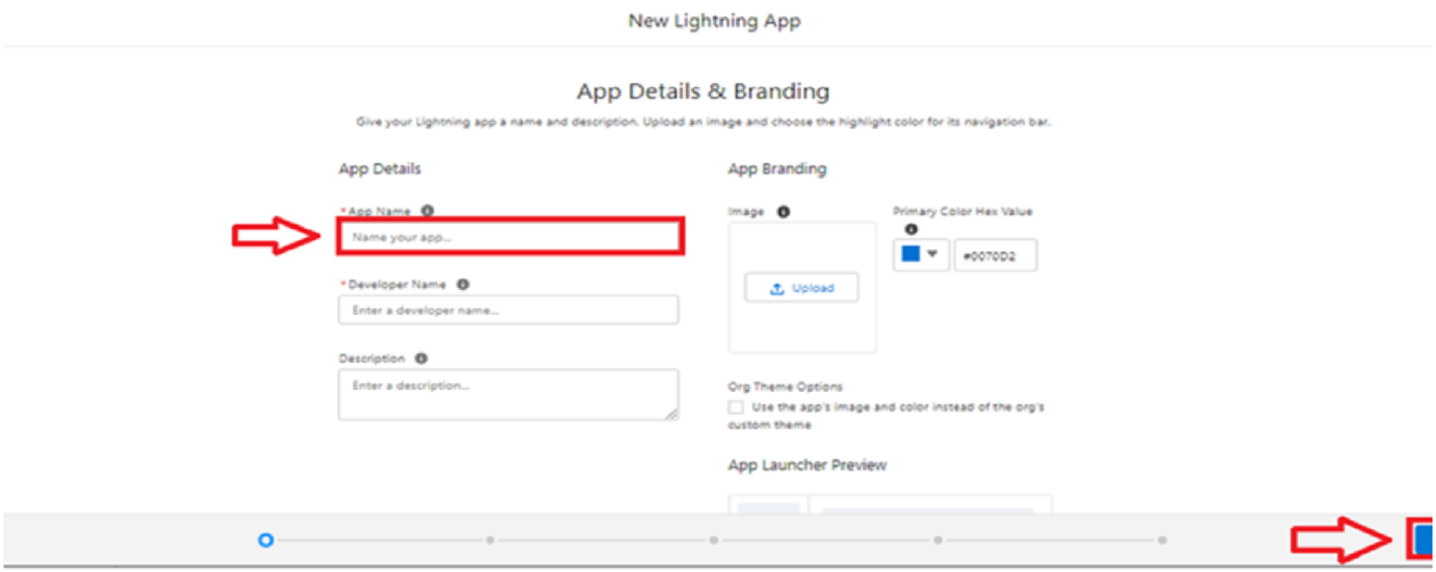
1. Go to setup page --> search “app manager” in quick find --> select “app manager” -> click on New lightning App.



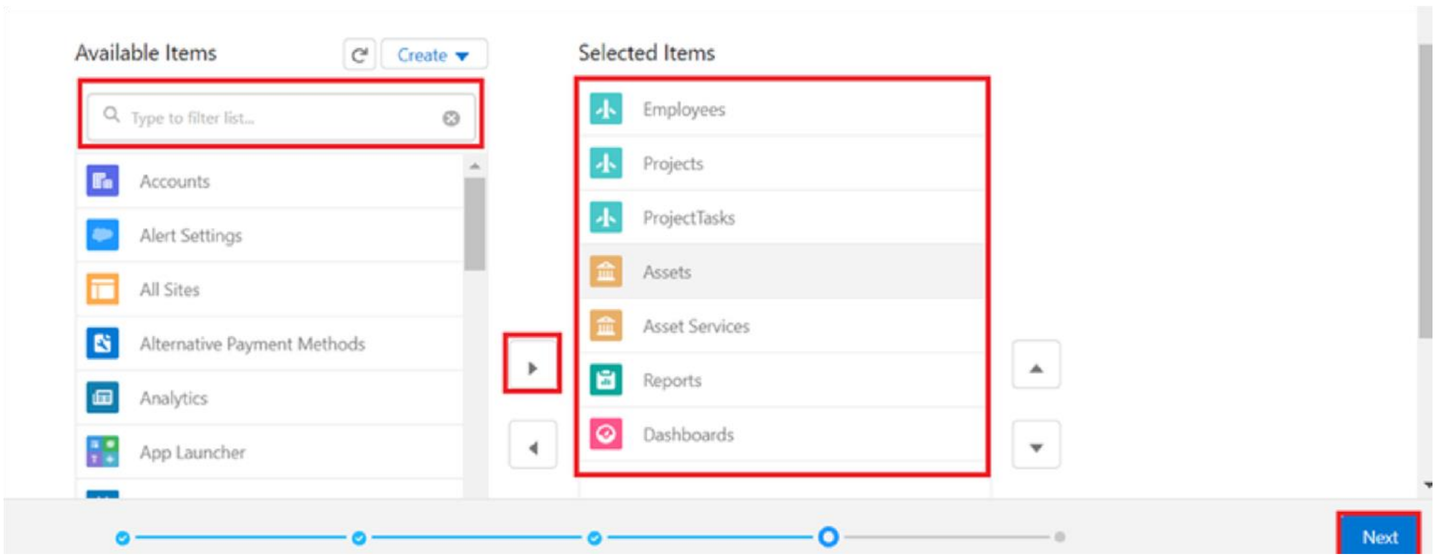
2. Fill the app name in app details and branding as follow

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.



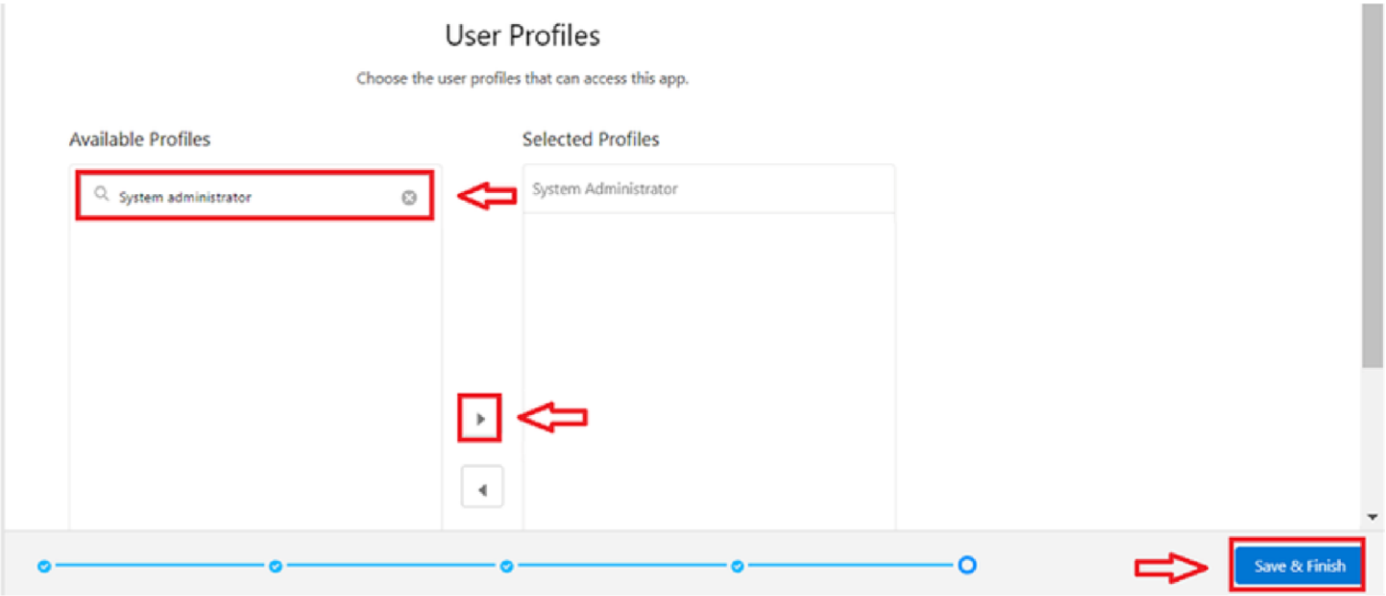
4. To Add Navigation Items:



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.

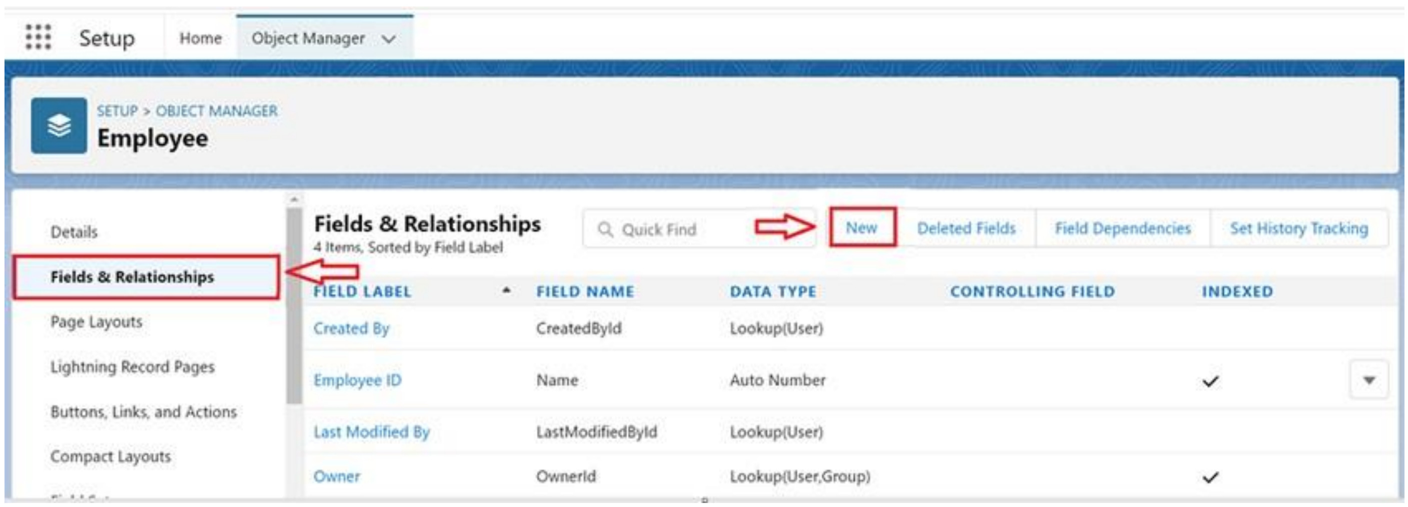
Types of Fields

1. Standard Fields
2. Custom Fields

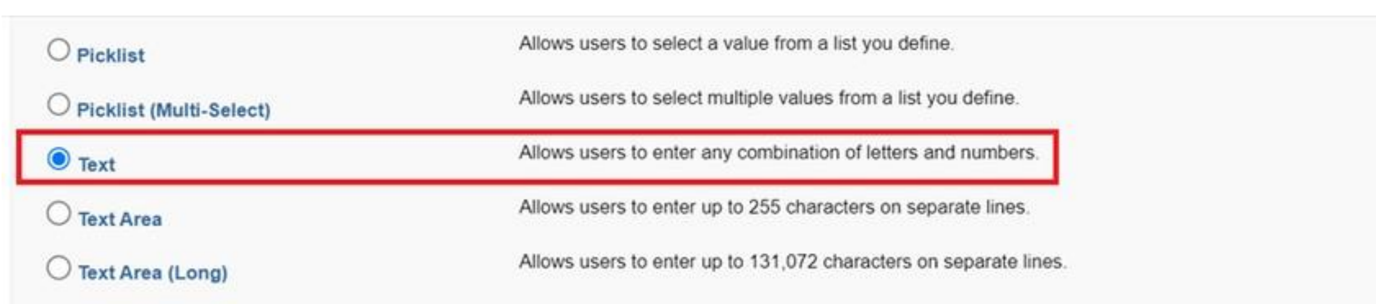
Activity 1 : Creating Text Field in Employee Object To create fields in an object:

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

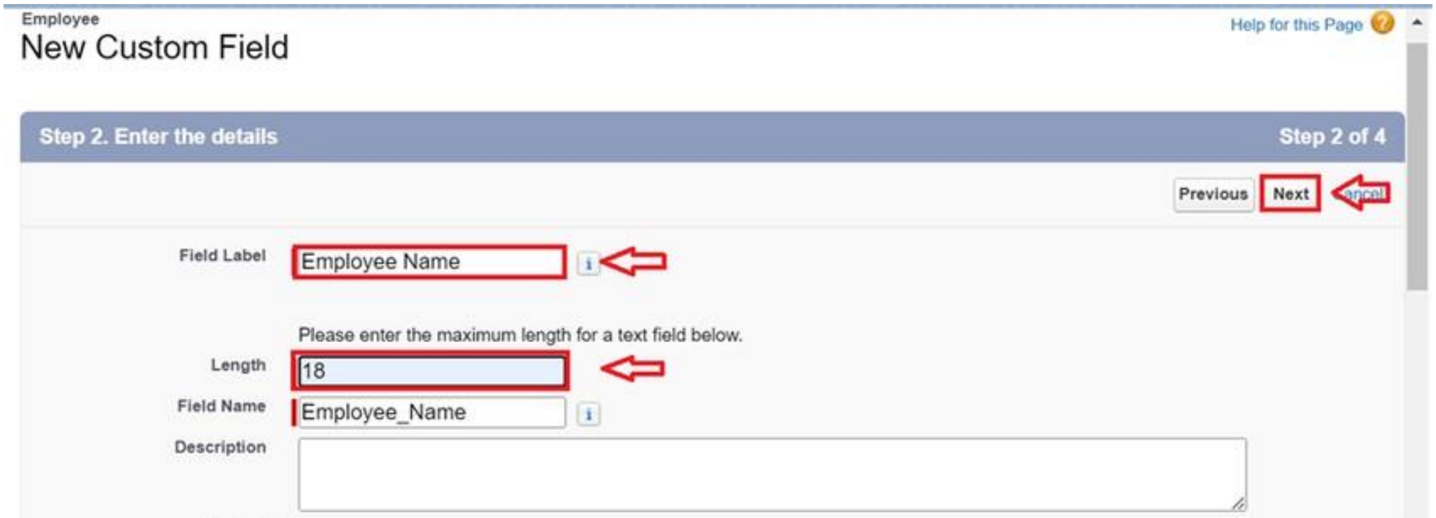
2. Now click on “Fields & Relationships” --> New



3. Select Data type as “Text”.



4. Click on Next

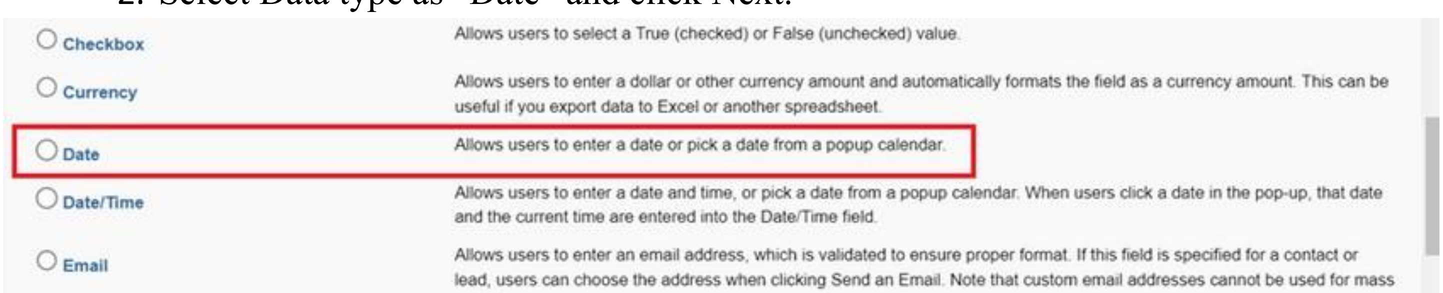


5. Fill the above as following:

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.



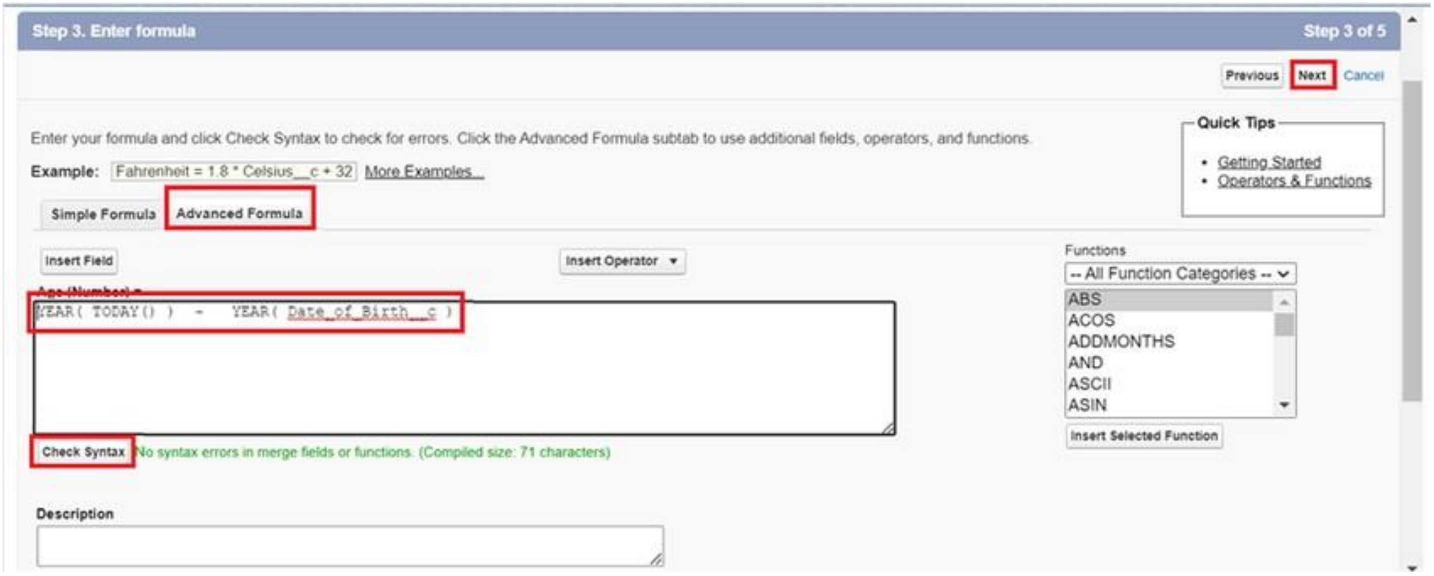
3. Click on Next.
4. Fill the above as following:
a. Field Label: Date of Birth.
b. Field Name : gets auto generated.
c. Click on Next --> Next --> Save and new.

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.

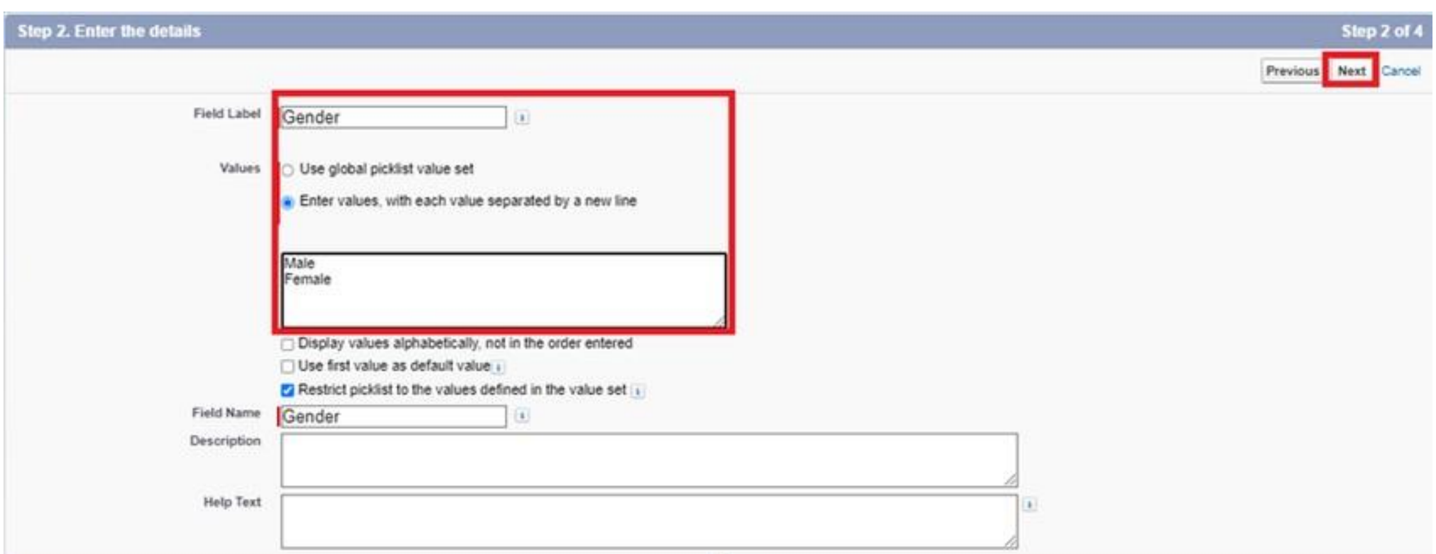
4. Under Advanced Formula write down the formula and click “Check Syntax”and Next --> Next --> Save & New.



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 valueseparated by a new line" and enter values as shown below.



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).

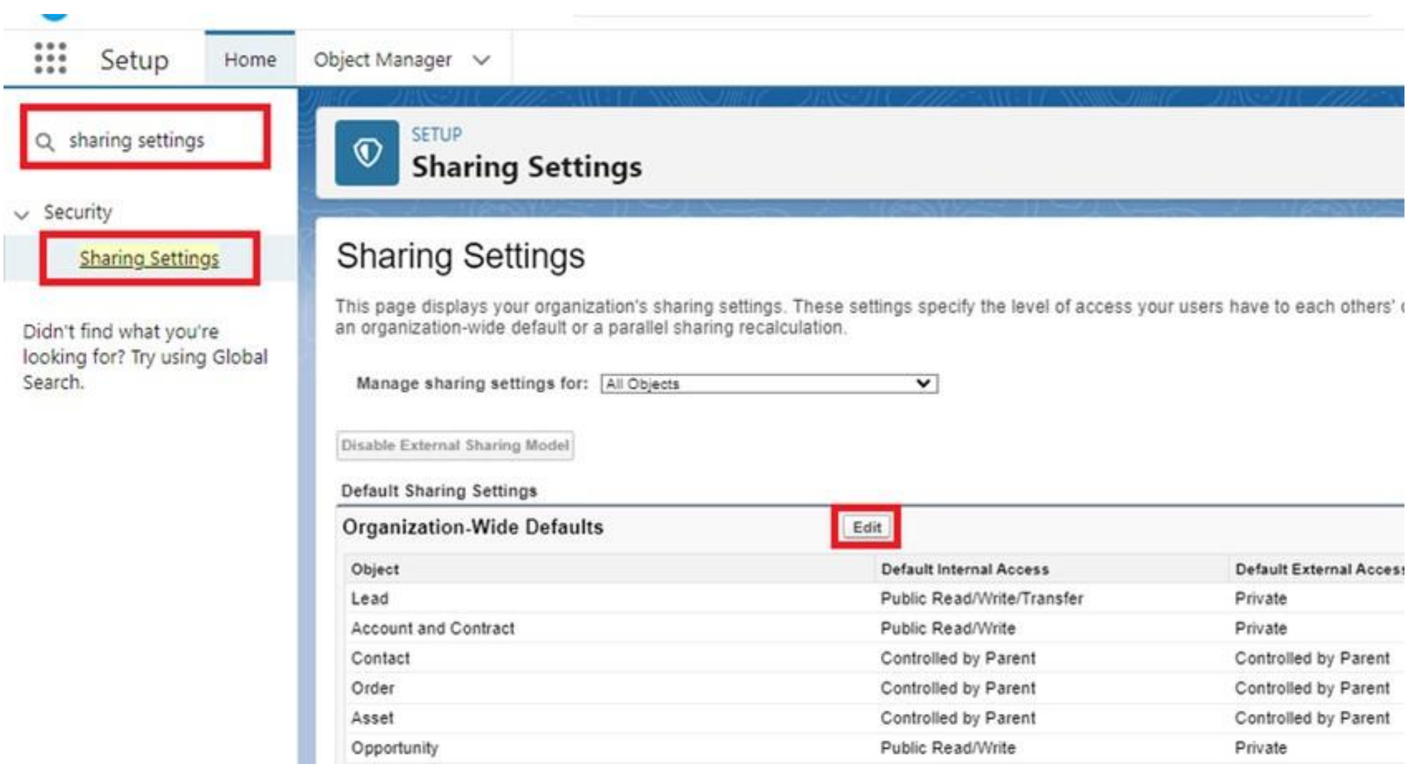
Primarily, there are four levels of access that can be set in Salesforce OWD and they are-

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.



Search for the Employee object.

3.Under default internal access and default external access change the 4.options to “Private”

and under grant using hierarchies select check box.

5 .Click on save.

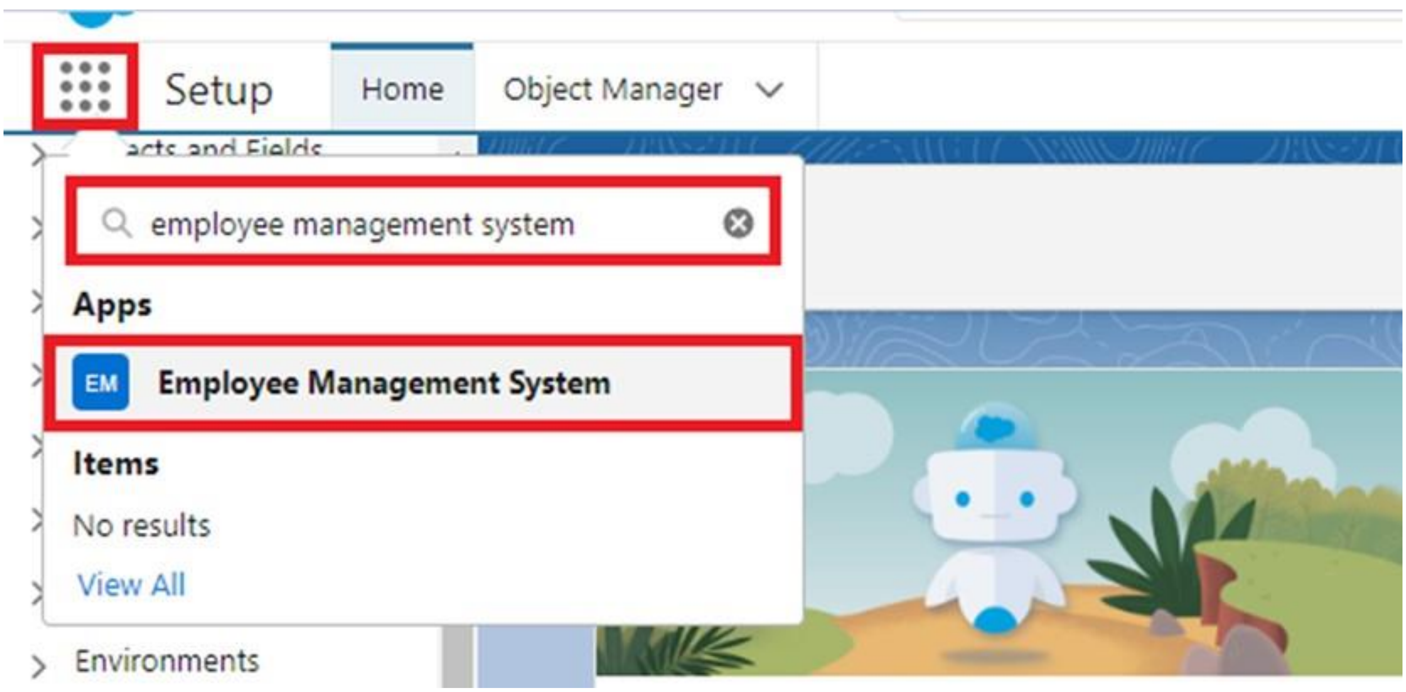
6. This Setting is for all the Users Which have been Created.

Activity - 2
Set OWD as Private for Project and Asset Service objects.

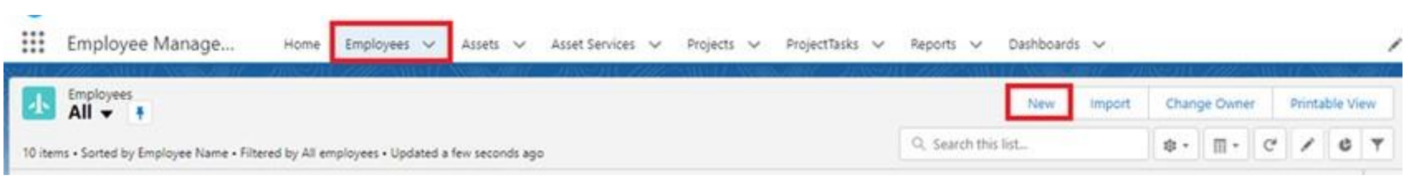
Use Case:
As a new Administrator, you perform user management tasks like creating and editing users, resetting passwords, granting permissions, configuring data access, and much more. In this unit, you will learn about users and how you add users to your Salesforce org.

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.

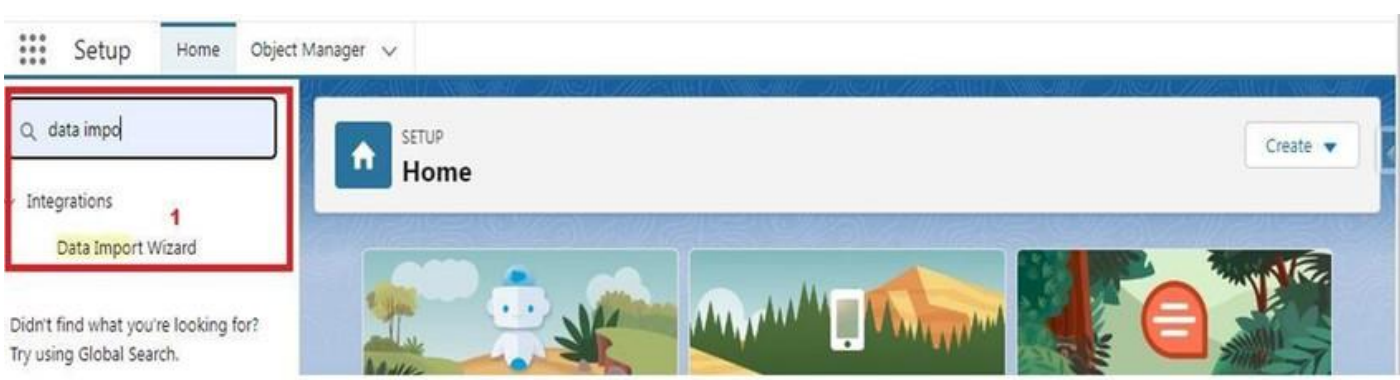
Import Data

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

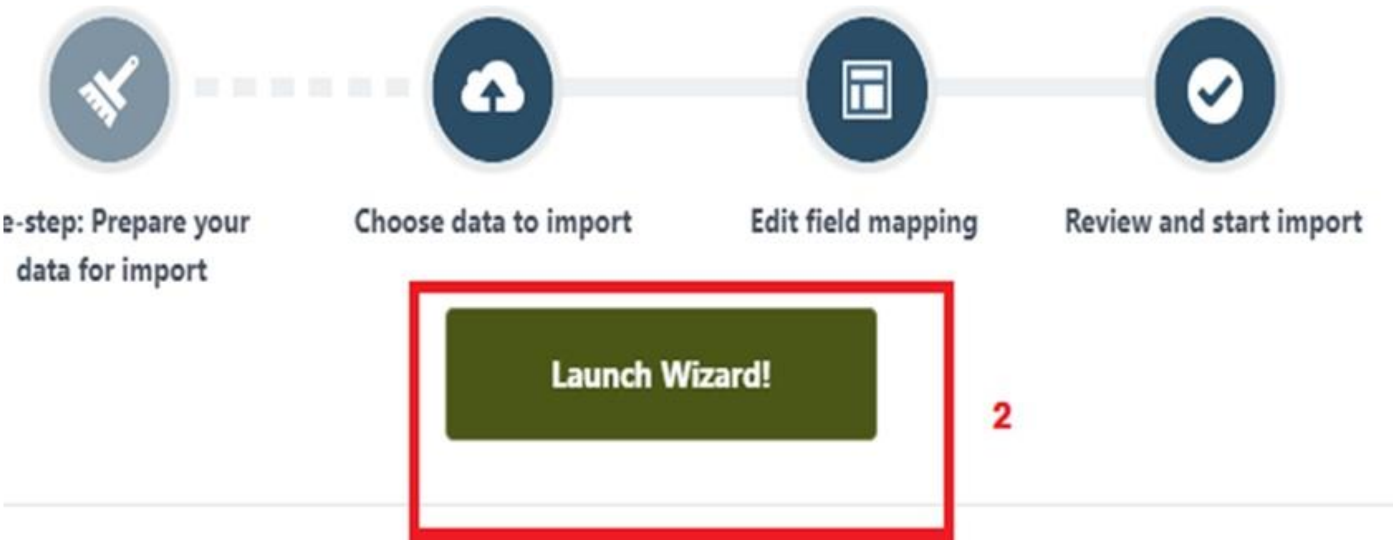
https://tinyurl.com/SF-Employee-Data

Activity-1: Importing data using Data Wizard

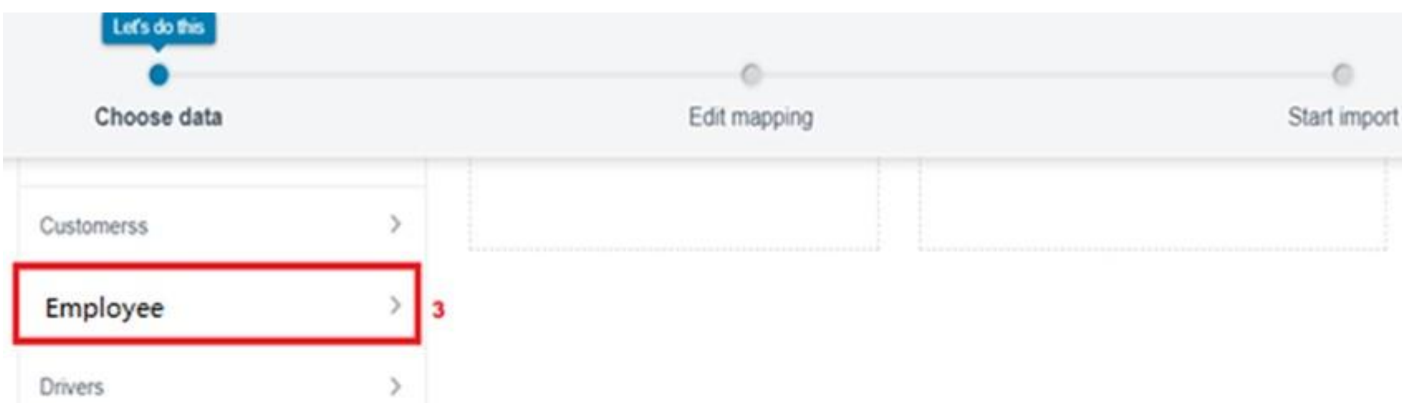
1 . From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



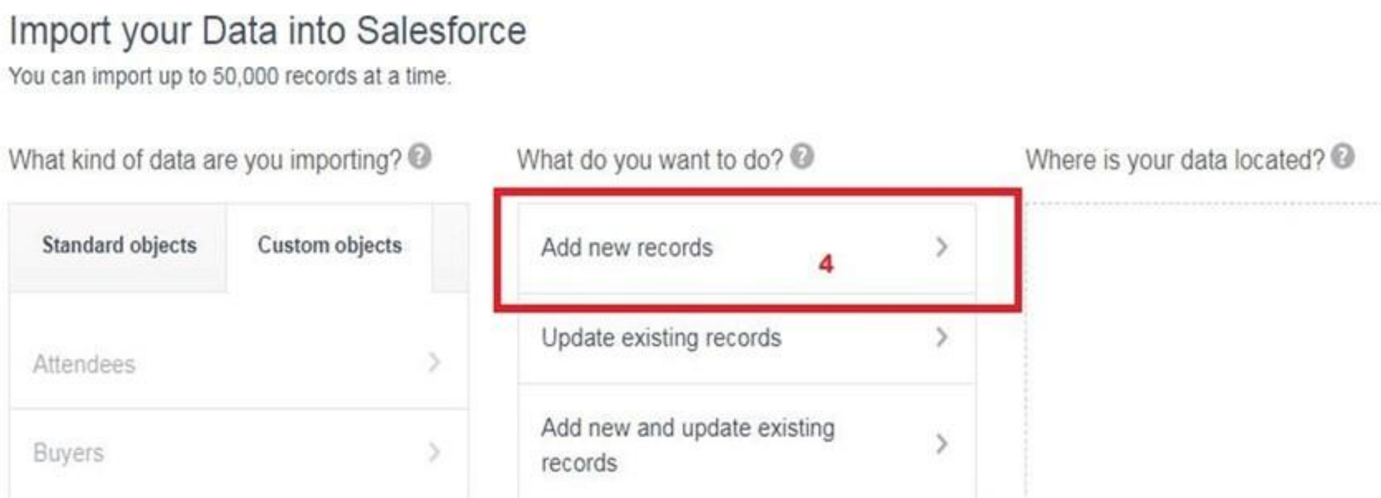
3 .Click Launch Wizard!



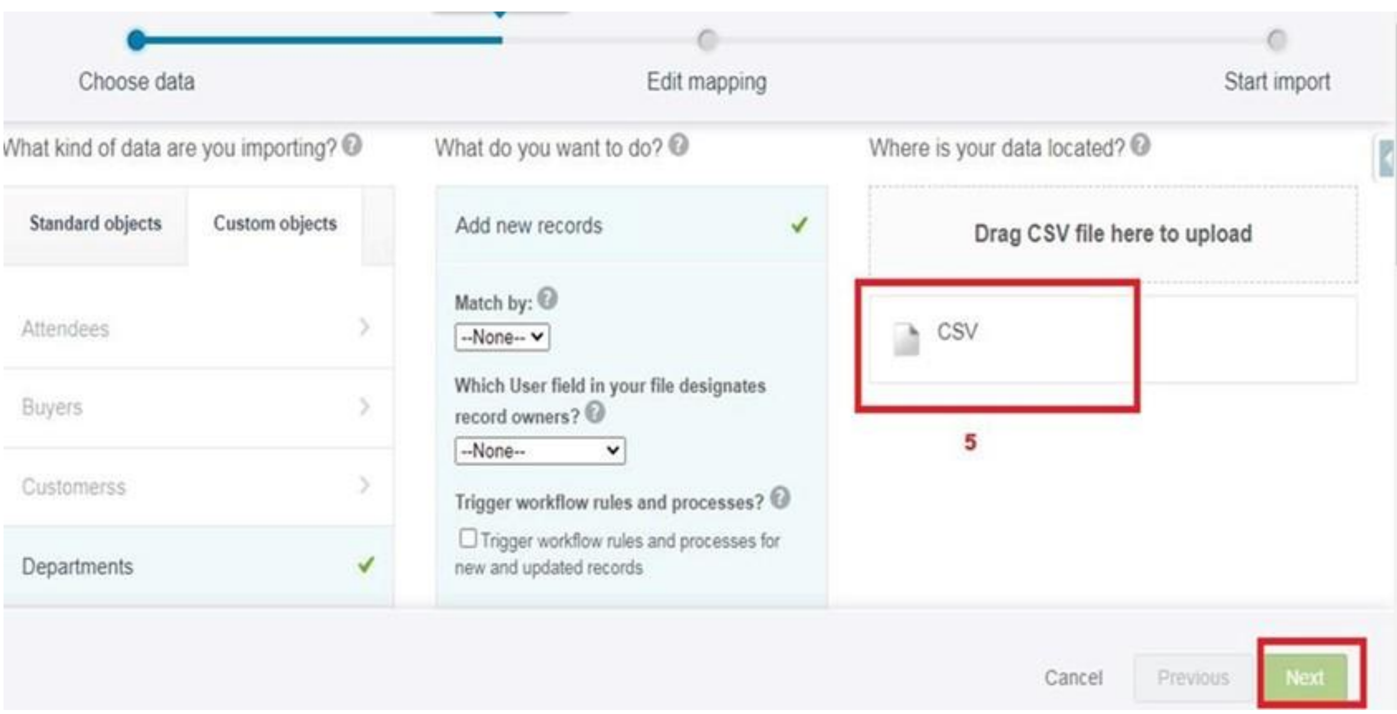
4 .Click the Custom Objects tab and select the Employee object.



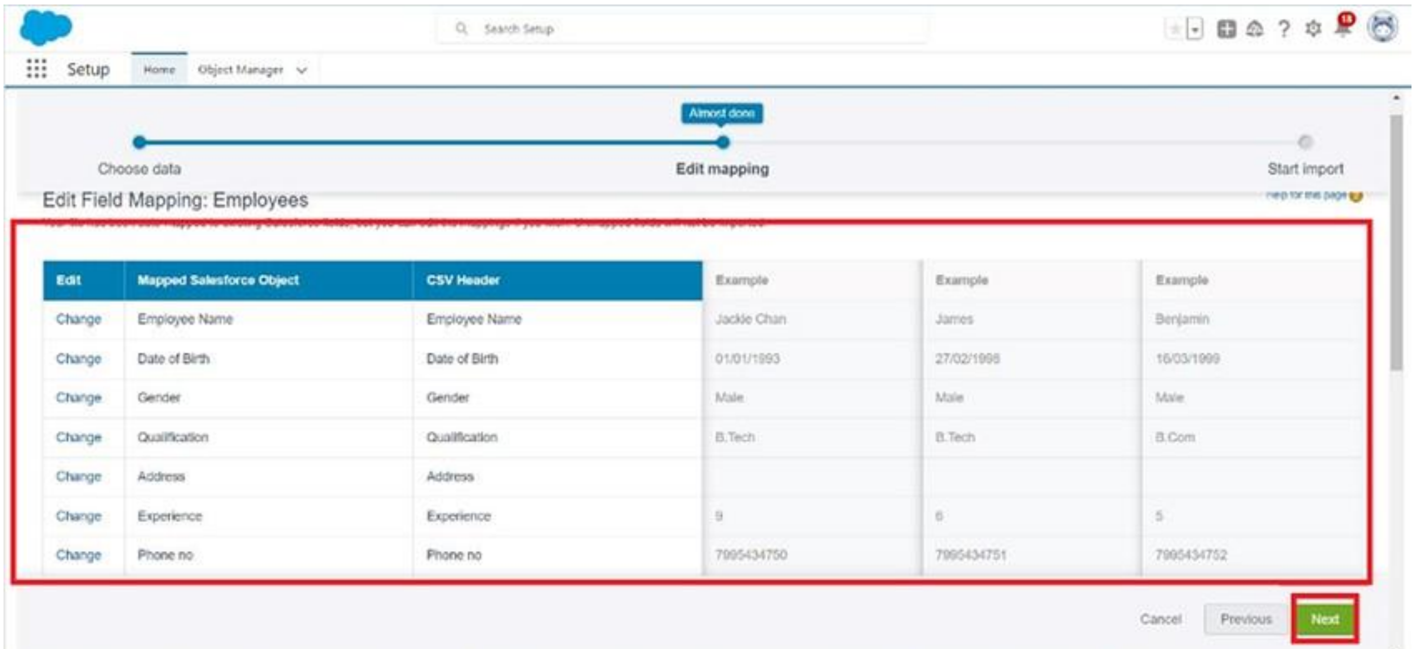
5 .Select Add new records.



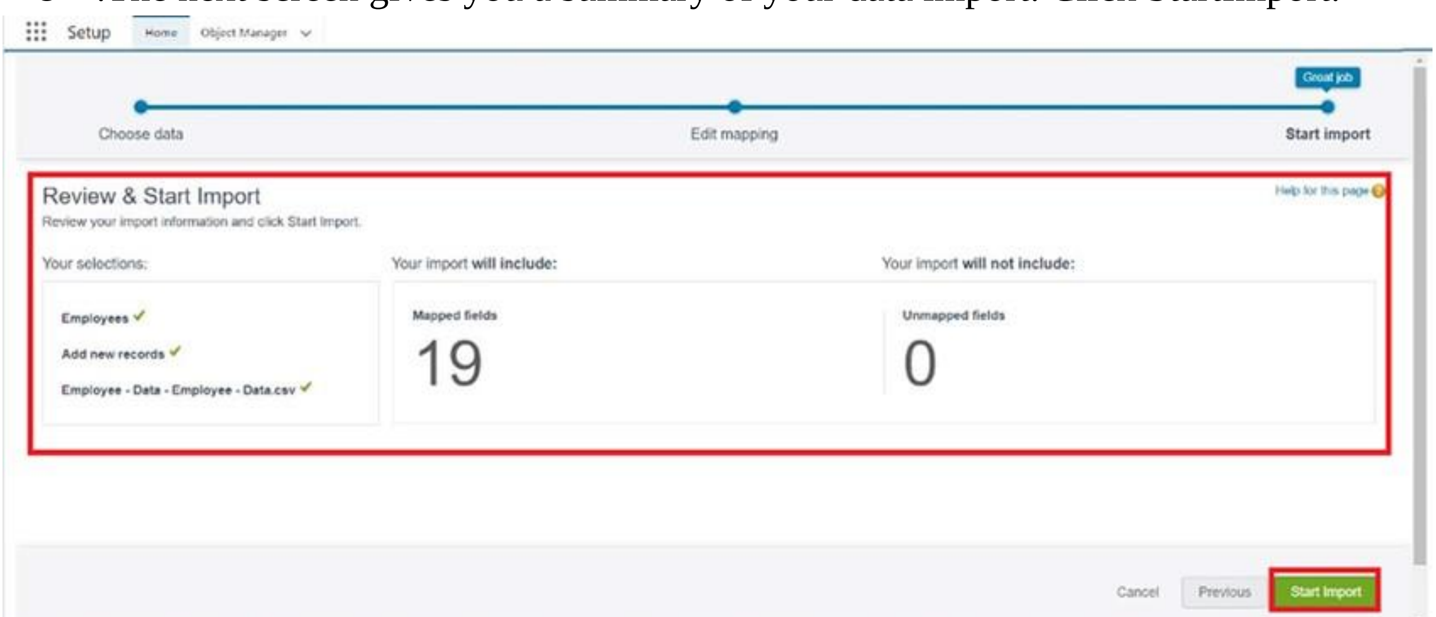
6 .Click CSV and choose file Employee_CSV which we made earlier. Click Next.



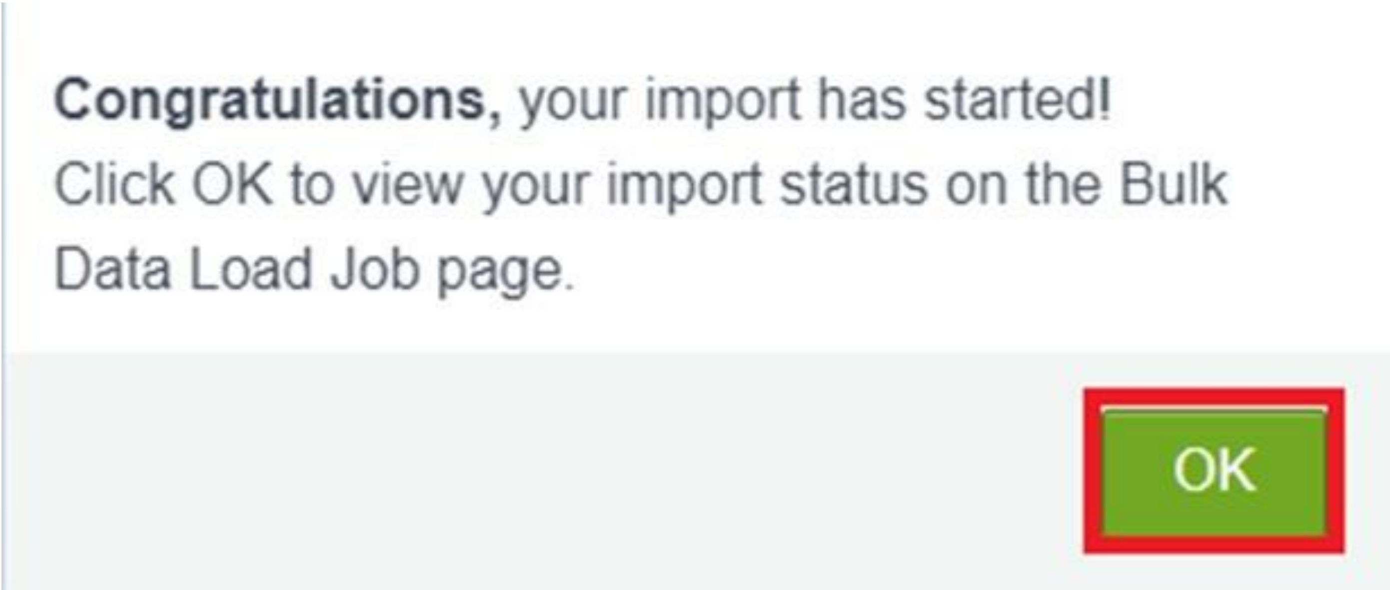
7 .Since the field names in the CSV file (CSV Header) are the same as the fieldnames in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.



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



9 .Click OK on the popup.



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

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

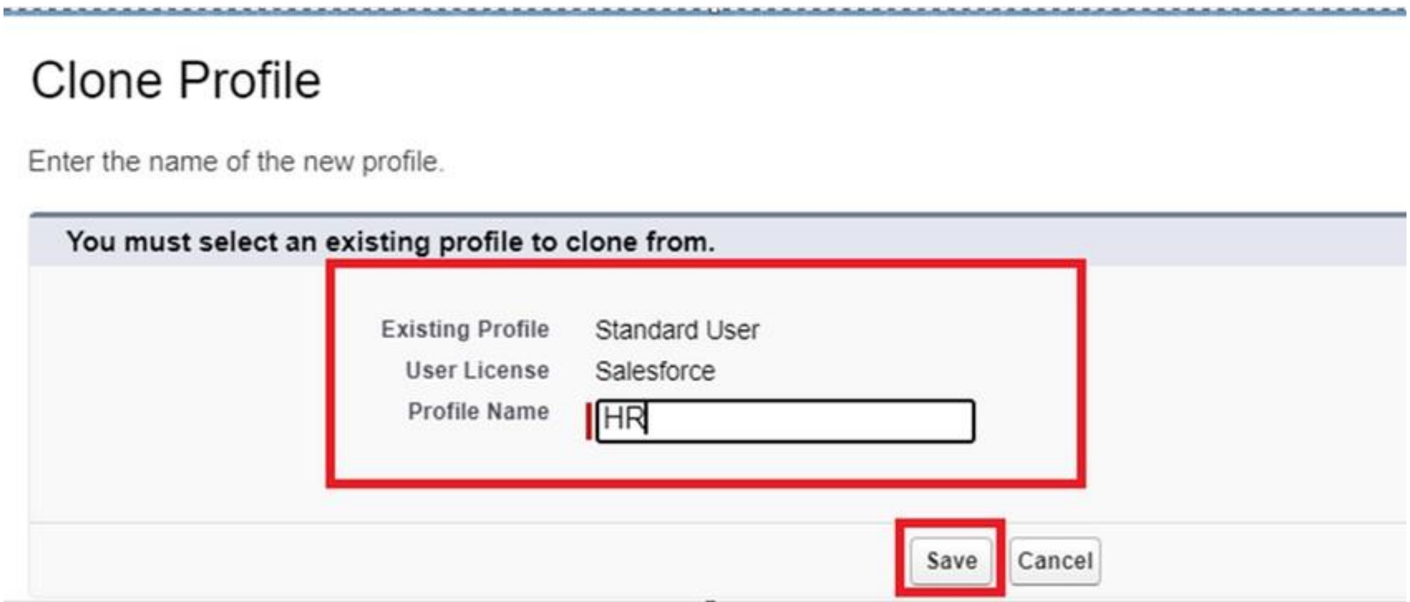
Profiles :

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 :

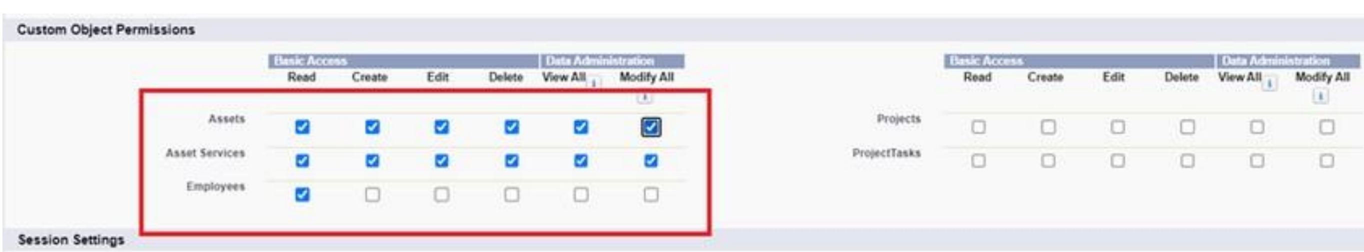
To create a new profile:

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



2. While still on the profile page, then click Edit.

3. Scroll down to Custom Object Permissions and Give access permissions forAssets and Asset Services objects.



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 thedesired 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 forEmployee, Project and Project Task objects.

4. Scroll down and Click on Save.

Activity 3: Create Employee Profile

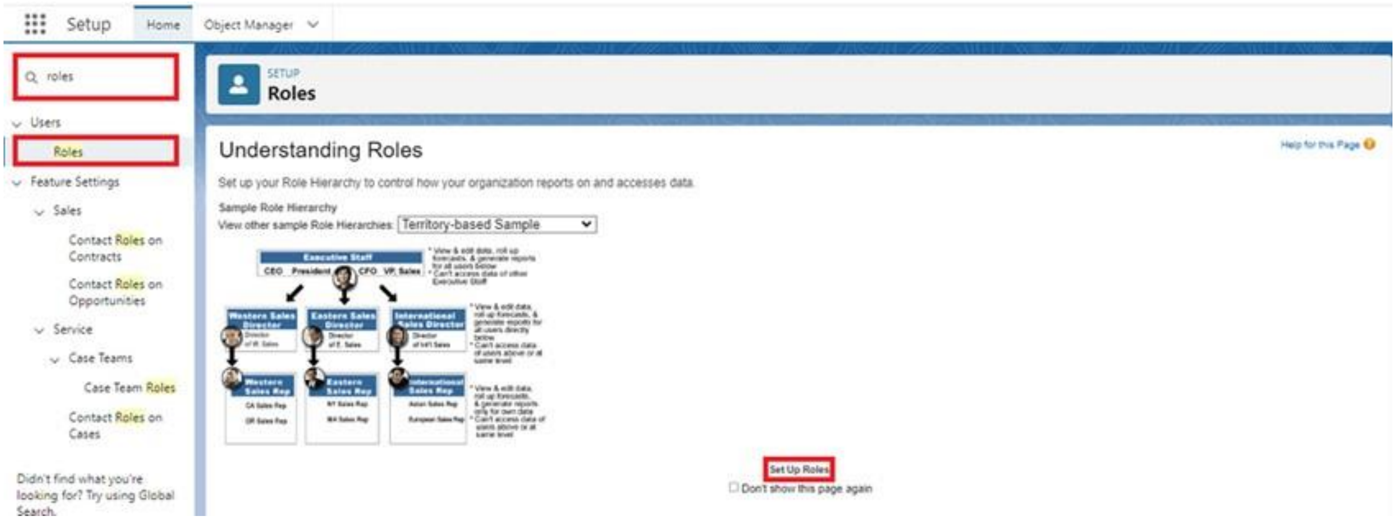
Create Employee Profiles for “On Site Employee”,”Remote Employee” as in Activity 2, but in step 3 only allow permission access for Project and Project Task objects only.

Role :

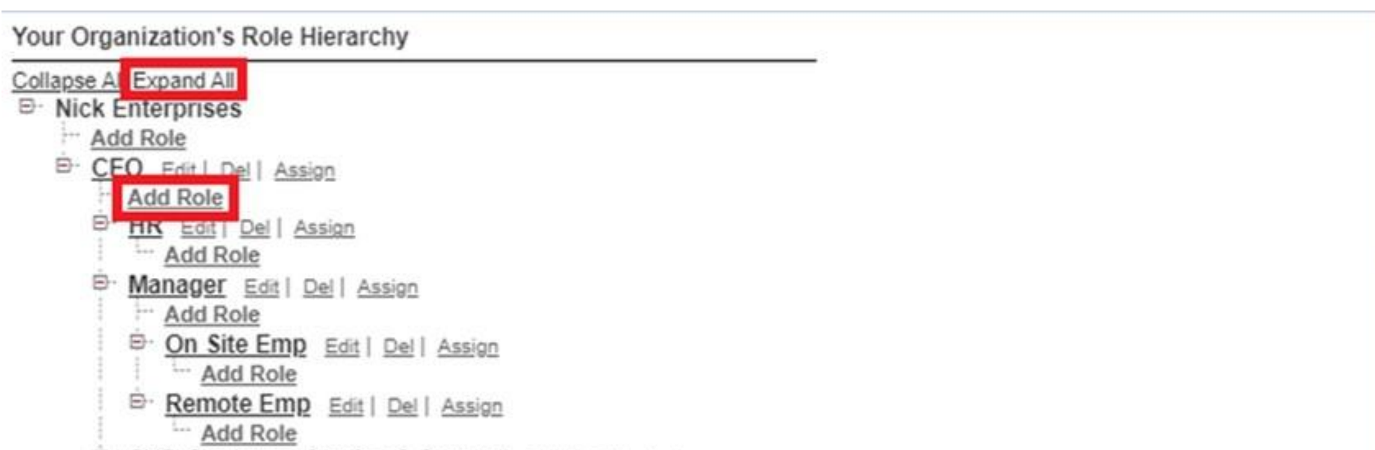
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Activity 1: Creating HR Role

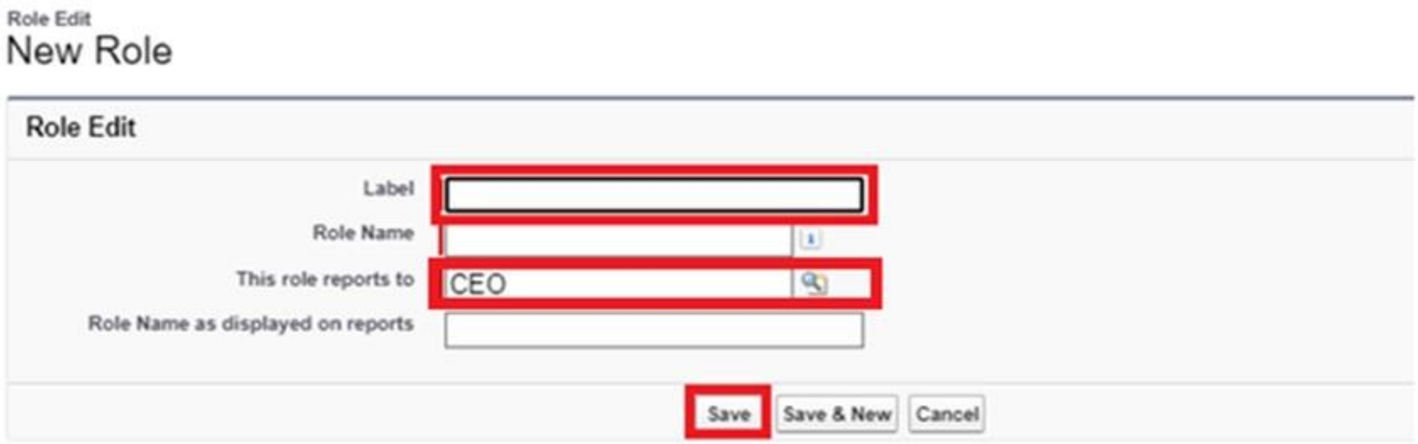
1. Go to quick find --> Search for Roles --> click on set up roles.



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



3. Give Label as “HR” and Role name gets auto populated. Check towhom this role (HR) reports. Then click on Save.



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 :

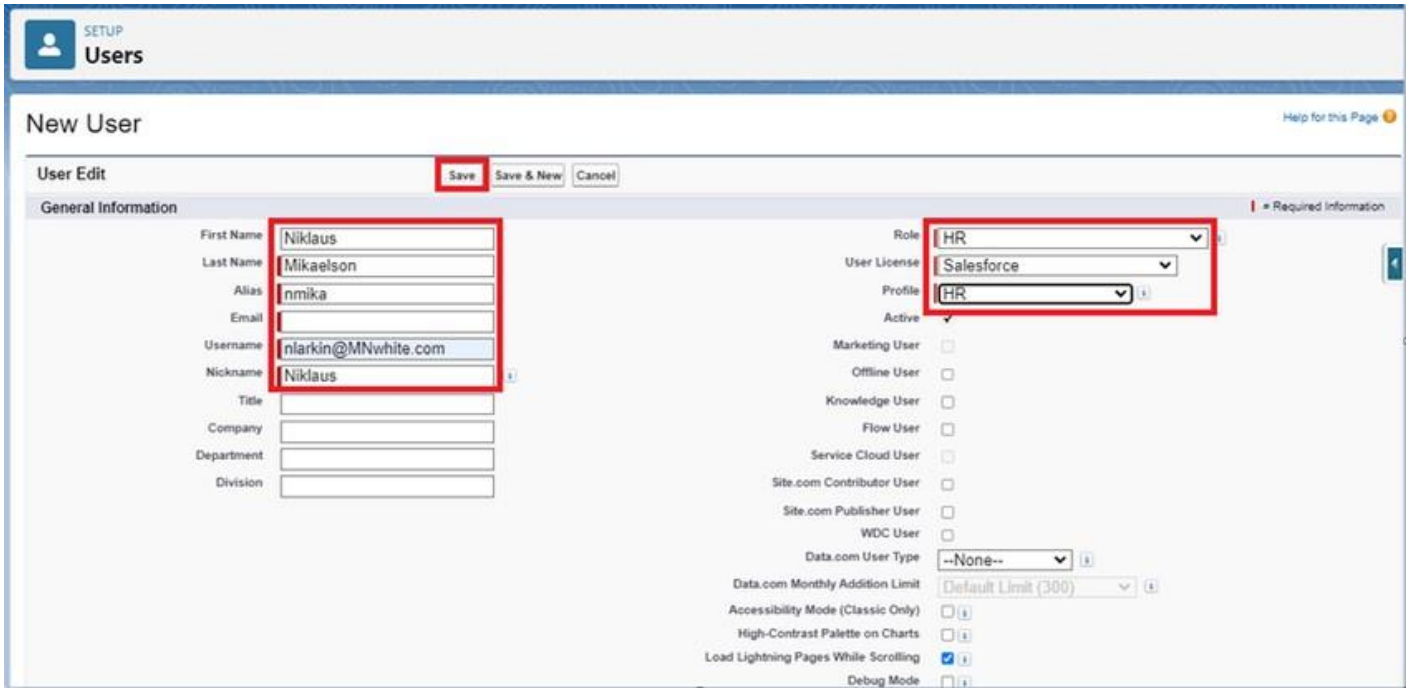
TheSmartBridge is all set to move with the Salesforce platform. As this platform is very new to the employees in the organization it's up to you to enlight every employee in it.

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



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.

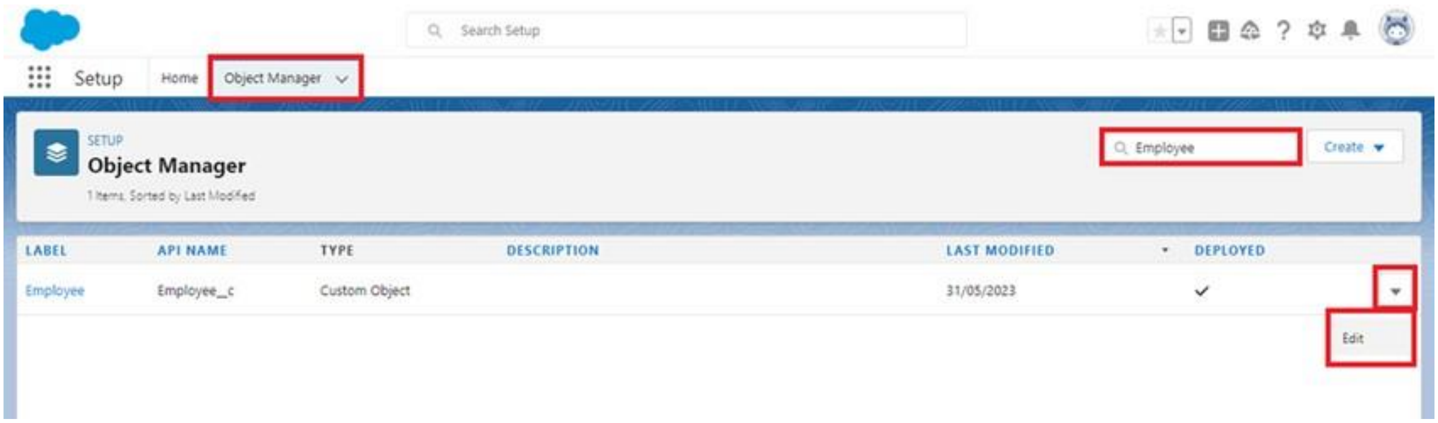
Page layouts

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

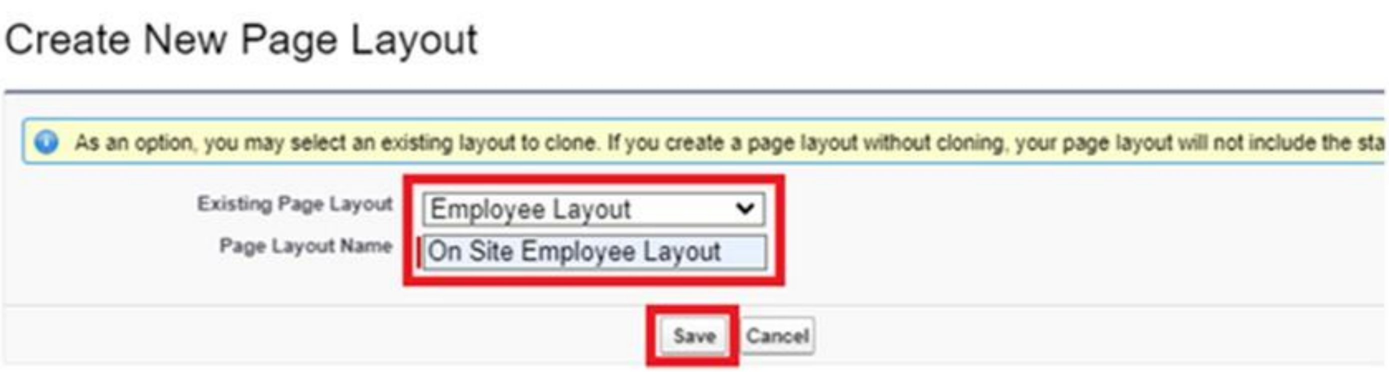
To Create a Page layout:

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



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

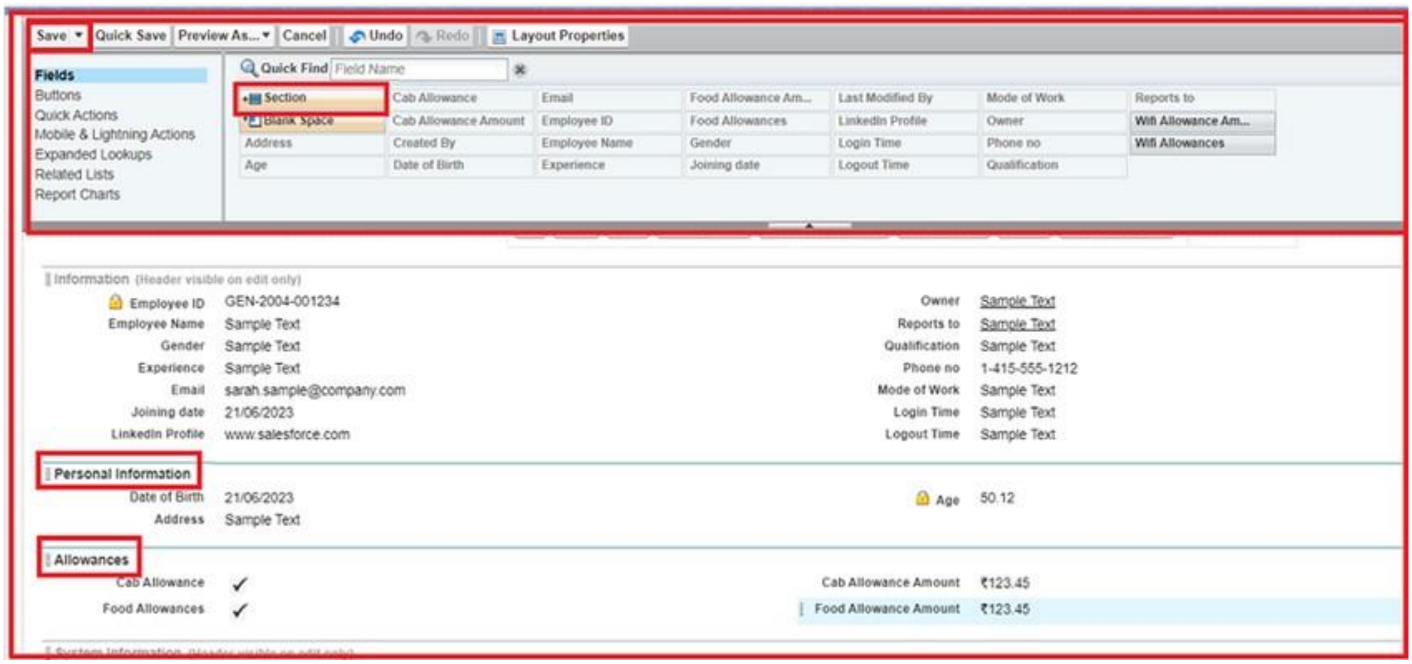
3 .Give Page layout Name as "On Site Employee Layout" and click on Save.



4 .Drag and drop the Section from the highlight panel below the Information andname it as “Personal Information” and click Ok.

5 .Drag Date of Birth, Address and Age fields from Employee Information toPersonal Information section.

6 .Similarly perform the above step to create “Allowances” and add allowancesfields in it as shown below.



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

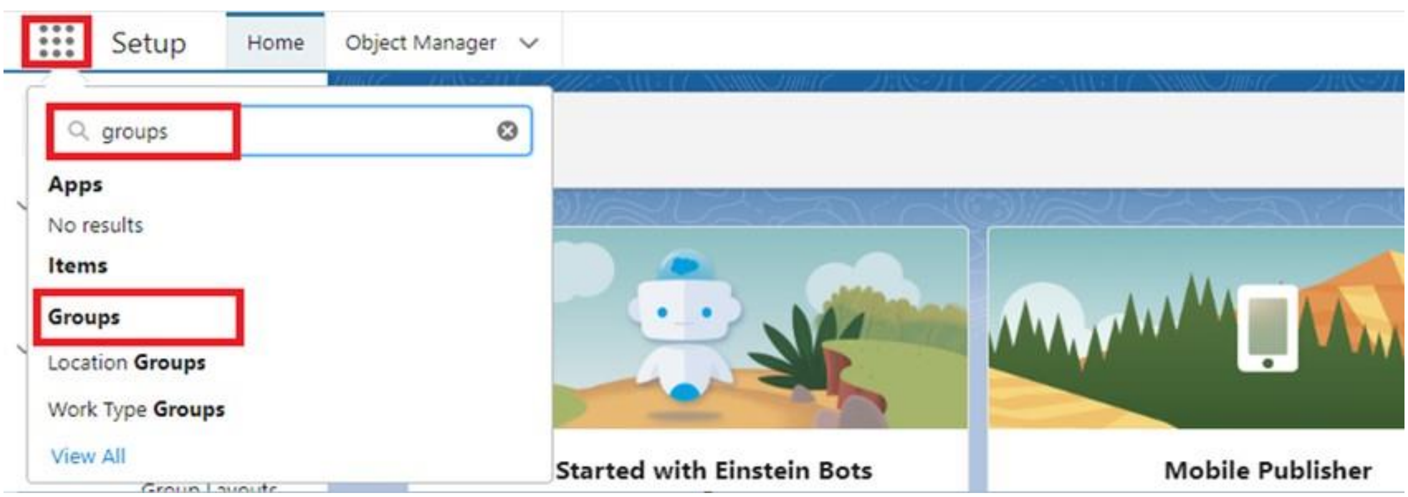
Salesforce Chatter Groups are collaborative spaces within the Salesforce platform that enable teams to communicate, share information, and collaborate on projects. They provide a centralized hub for discussions, file sharing, and updates, allowing users to stay connected, streamline workflows, and enhance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

Activity 1 : Creating a chatter group for your organization.

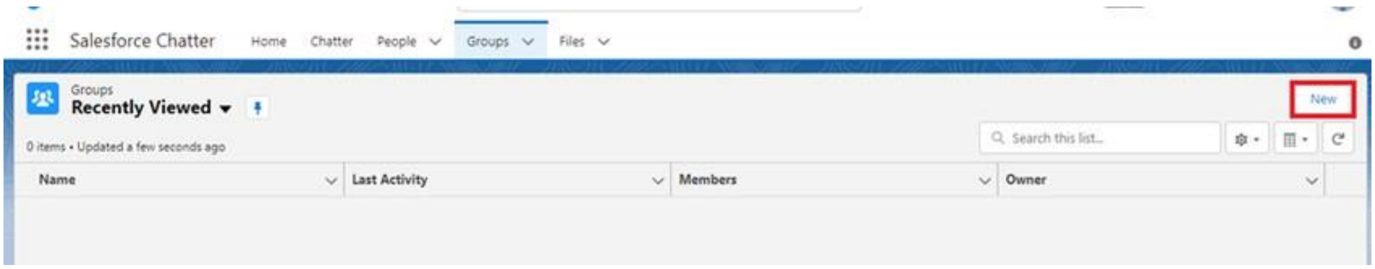
To Create a chatter group:

1 .Click the App Launcher.

2 .Enter Groups in the Search apps and items... box and select Groups.

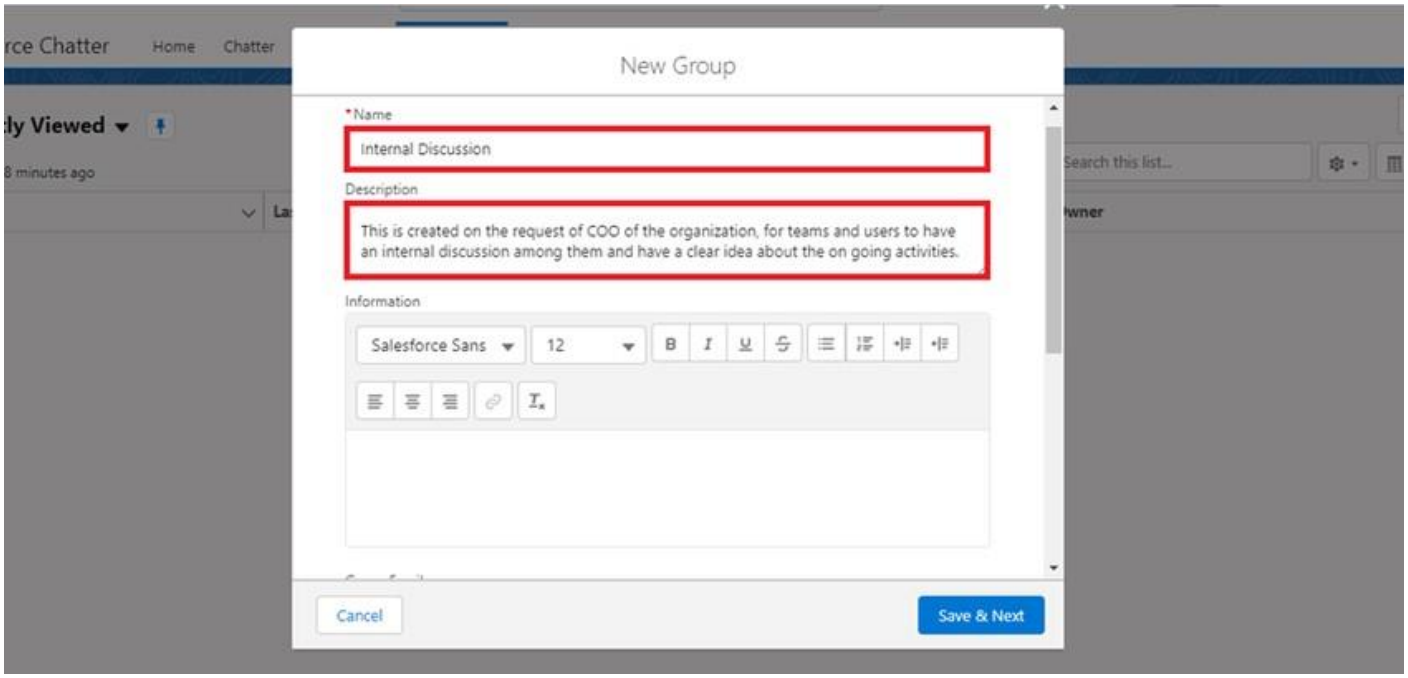


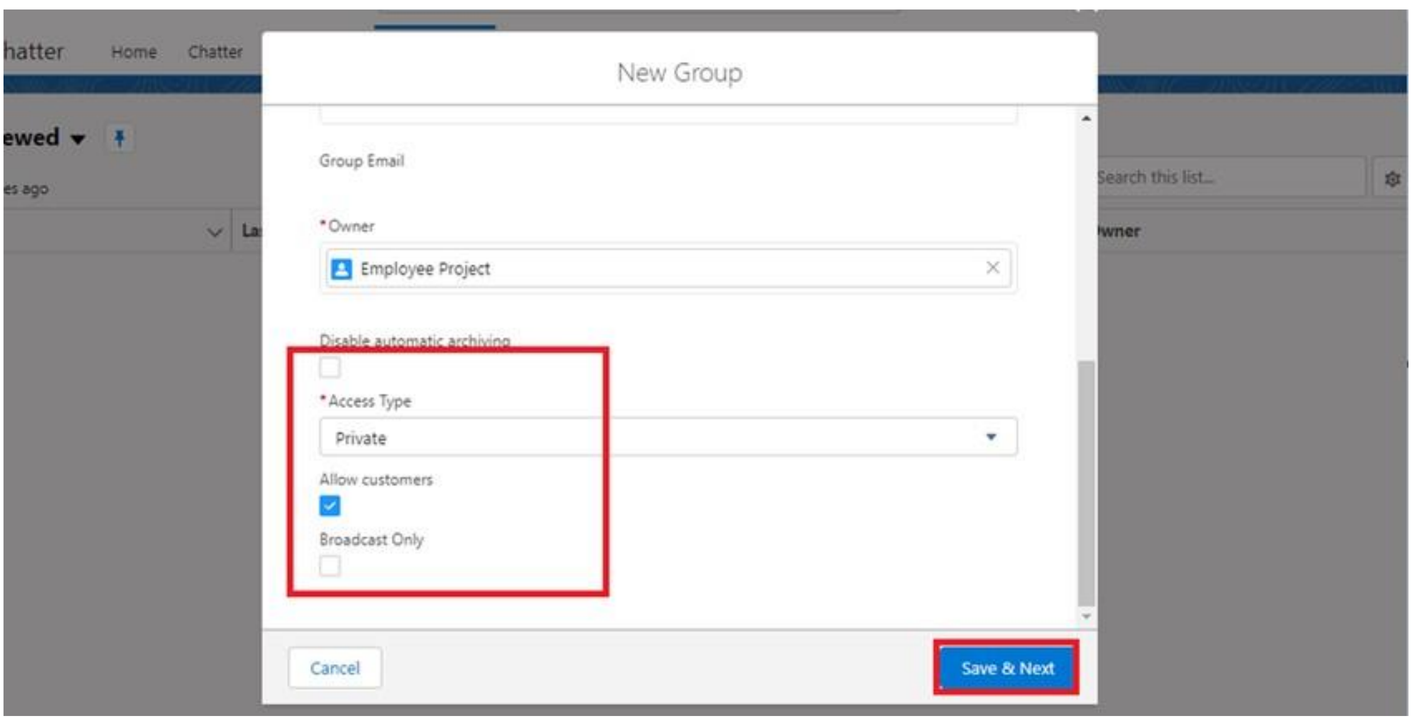
3 .Click New.



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

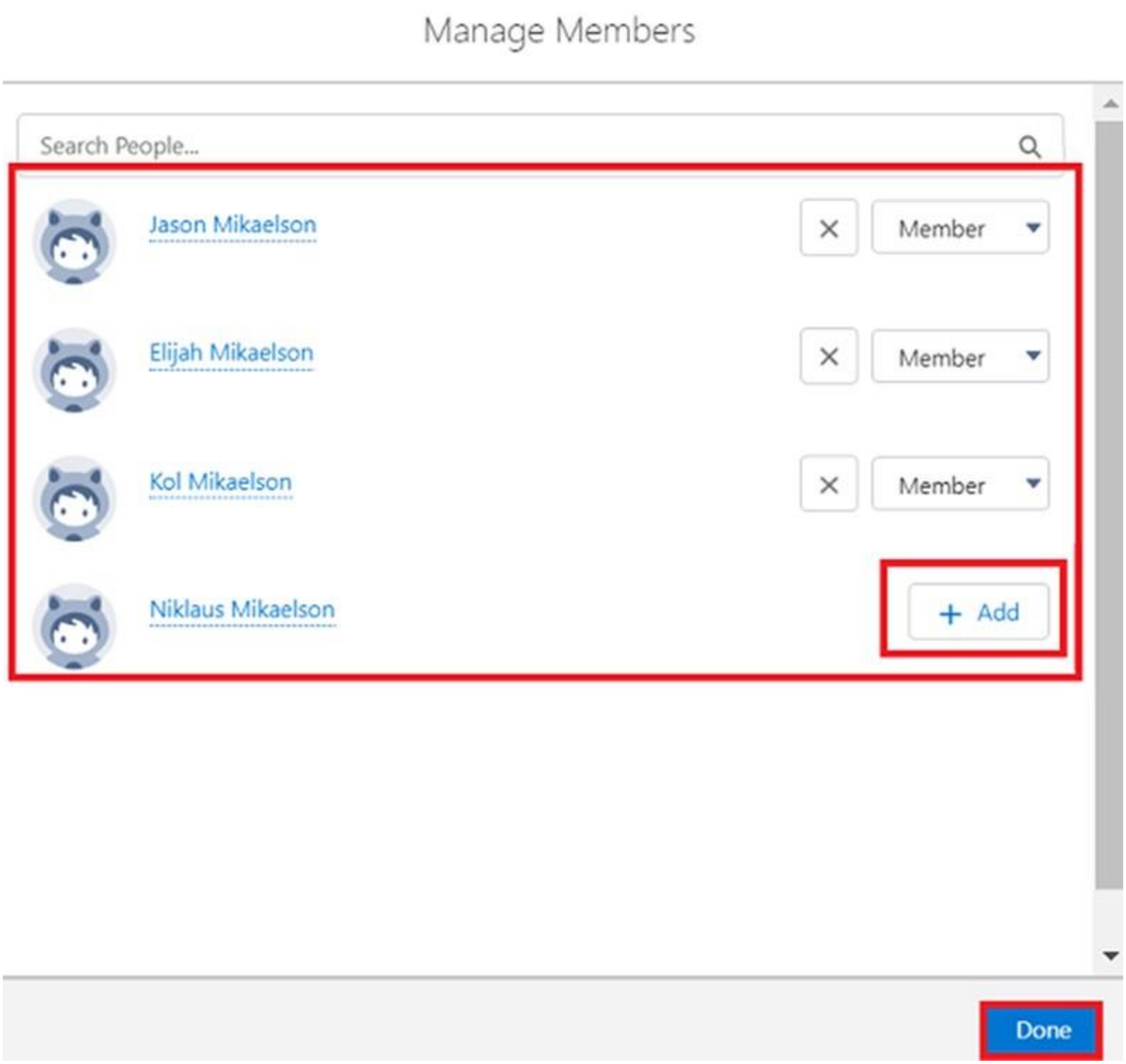
Field	Value
1.Group 2.Name 3.Description 4.Access Type Allow 5.Customers	Internal Discussion Give a understanding Description on your own Private Checked



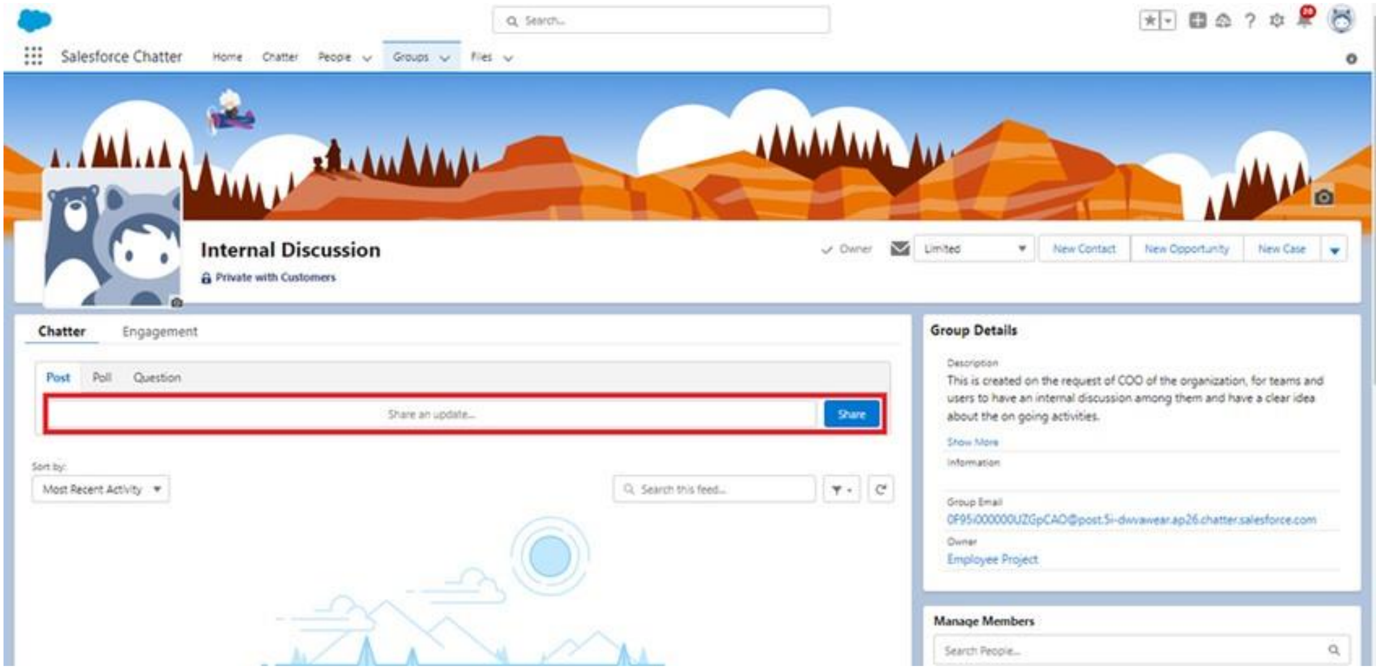


5 .Click Save & Next. Skip the Upload Picture section and click Next.

7 .On the Manage Members screen, click Add next to users you created in theprevious activity.


Manage Members
Search People...
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 tothe 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 :

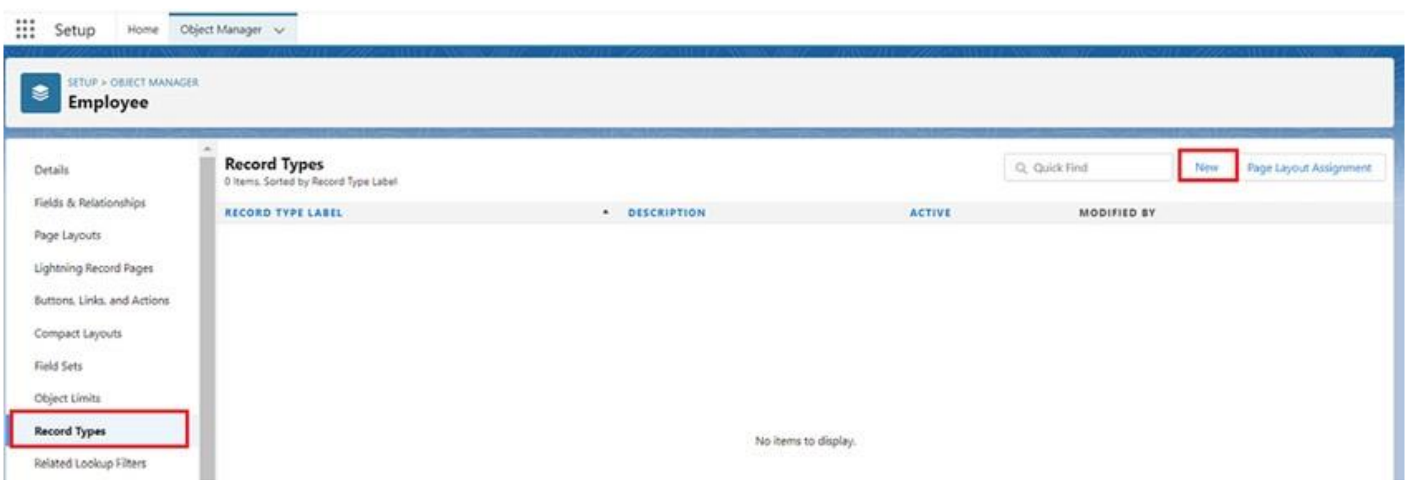
Record Types are a way of grouping many records of one type for that object. These can be applied to any standard or custom object, and allow you to have a different page layout, fields, required fields, and picklist values. Record types allow administrators to create a different page layout with custom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

Activity 1: Creating On Site Employee Record Type To

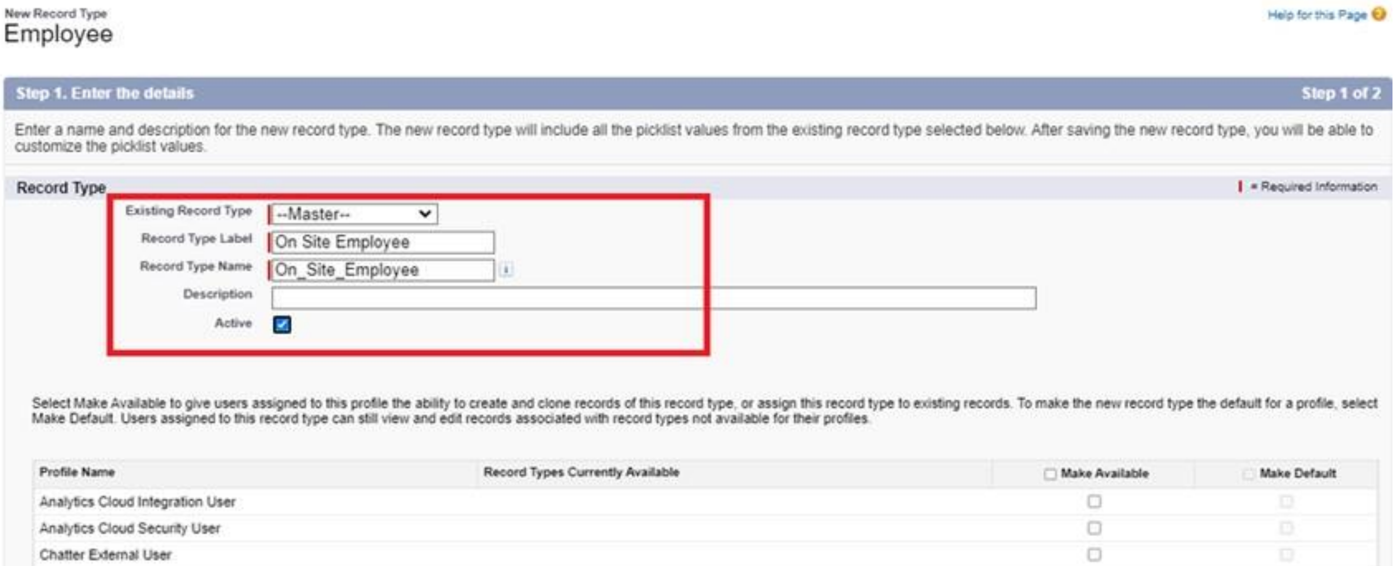
create a Record Type:

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

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

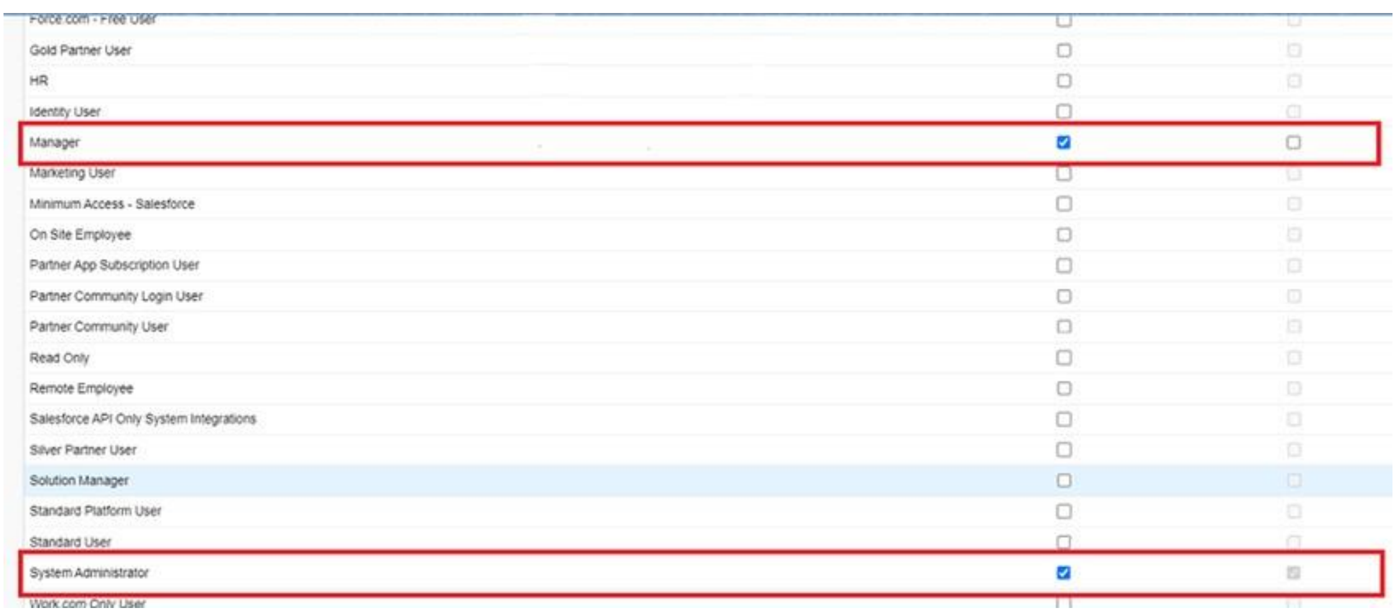


3. Give Record Type Label as “On Site Employee” and make it active.

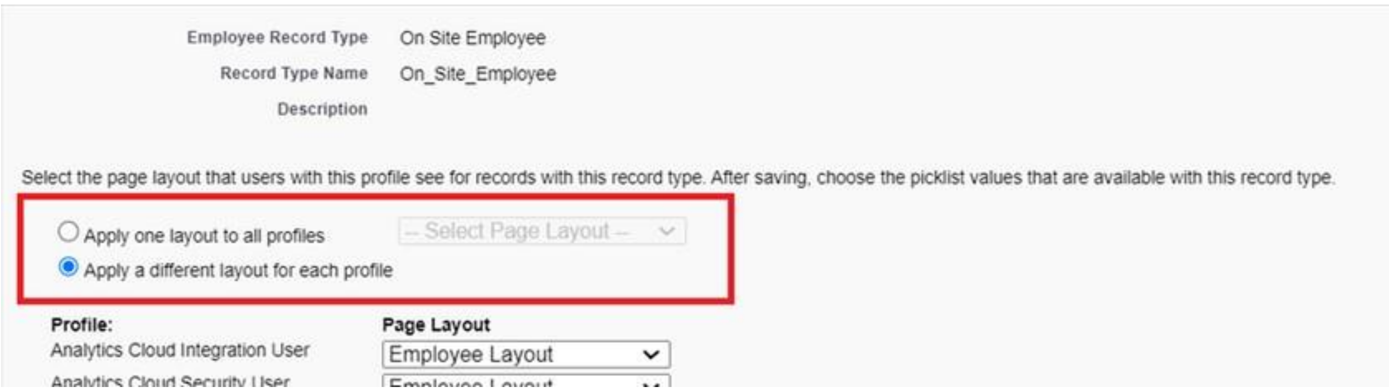


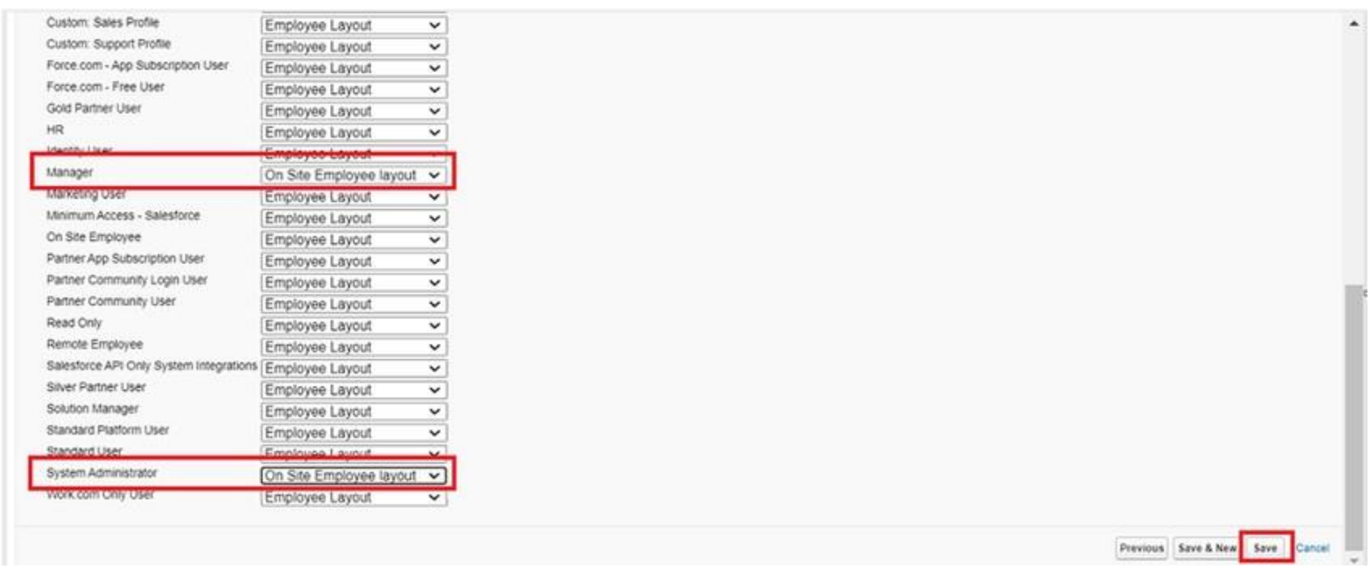
4. Uncheck for “Make Available”.

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



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





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

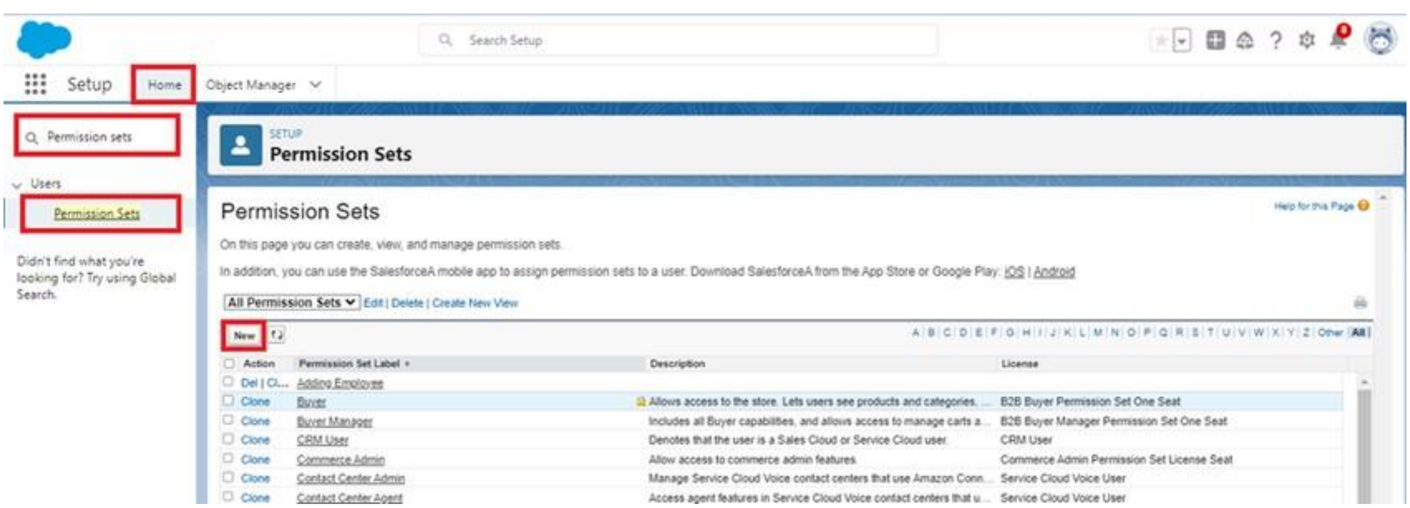
Permission sets

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.

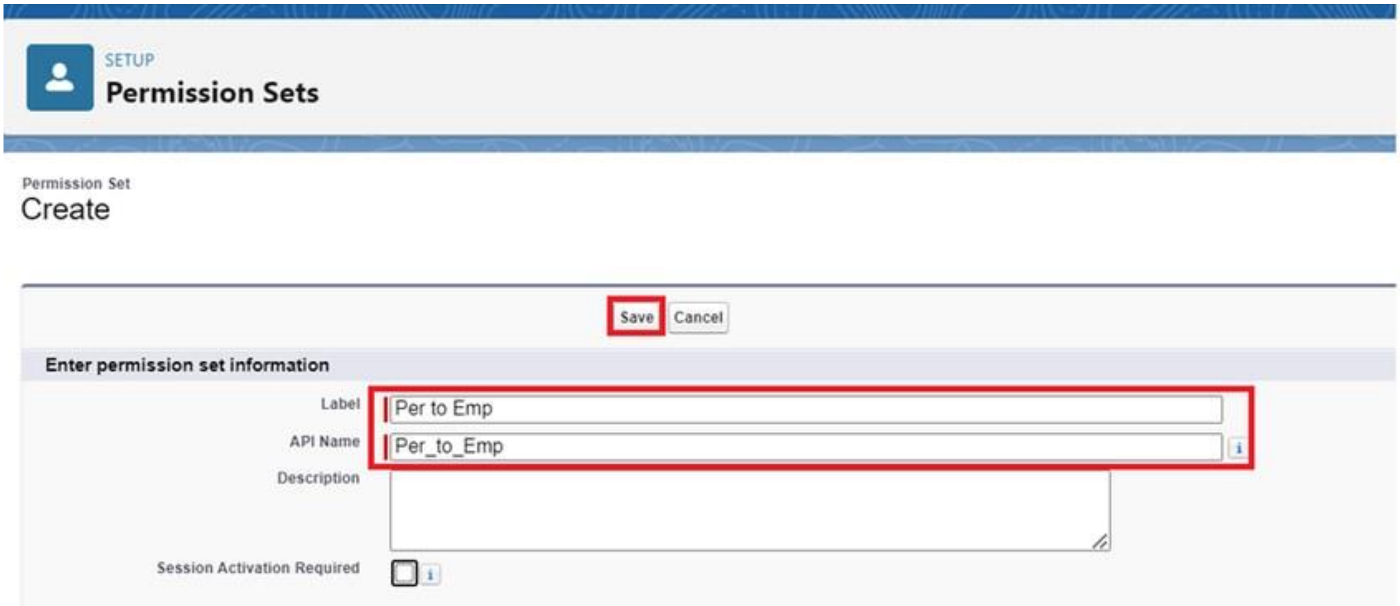
Activity 1: Creating a permission set To

Create a Permission Set:

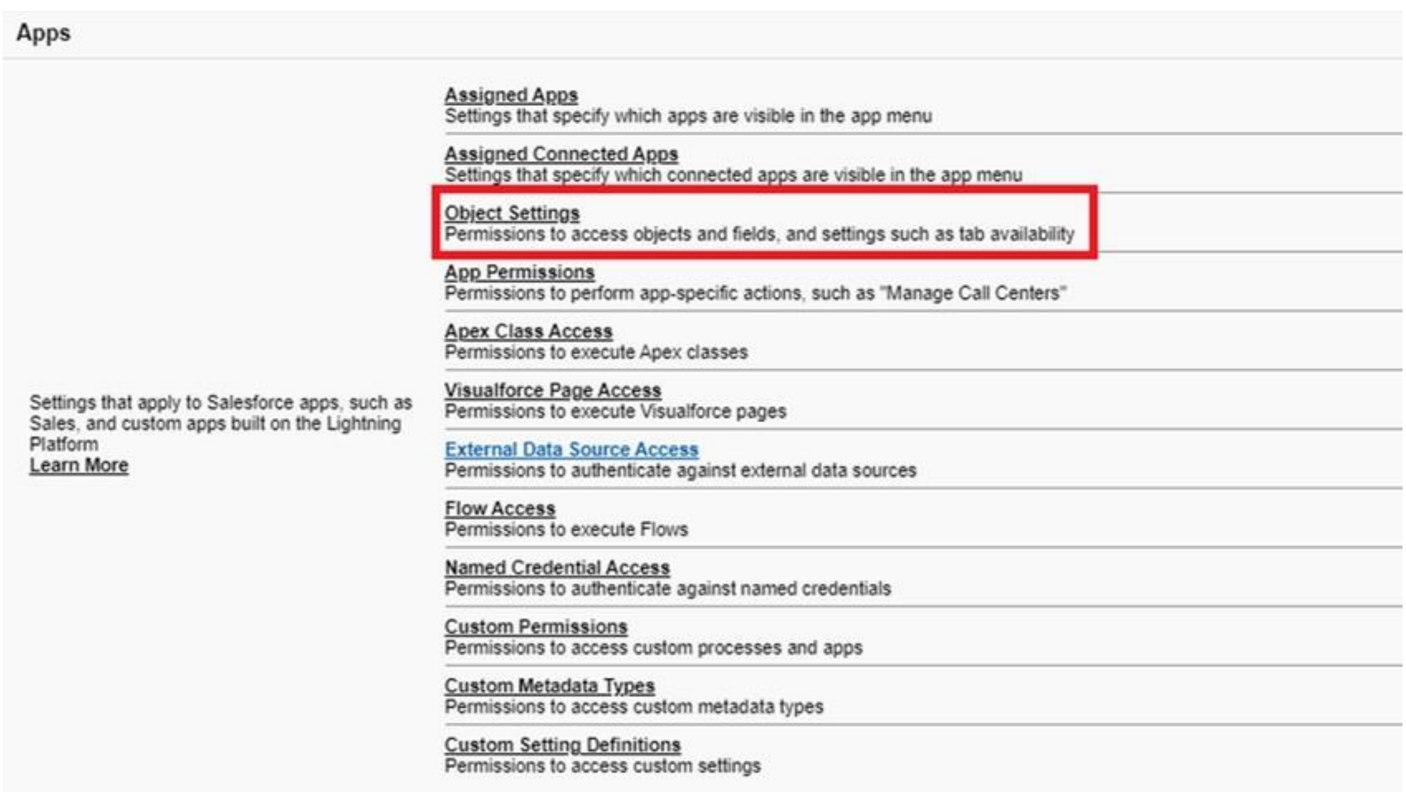
1. Go to setup --> type "permission sets" in quick search --> selectpermission sets --> New.



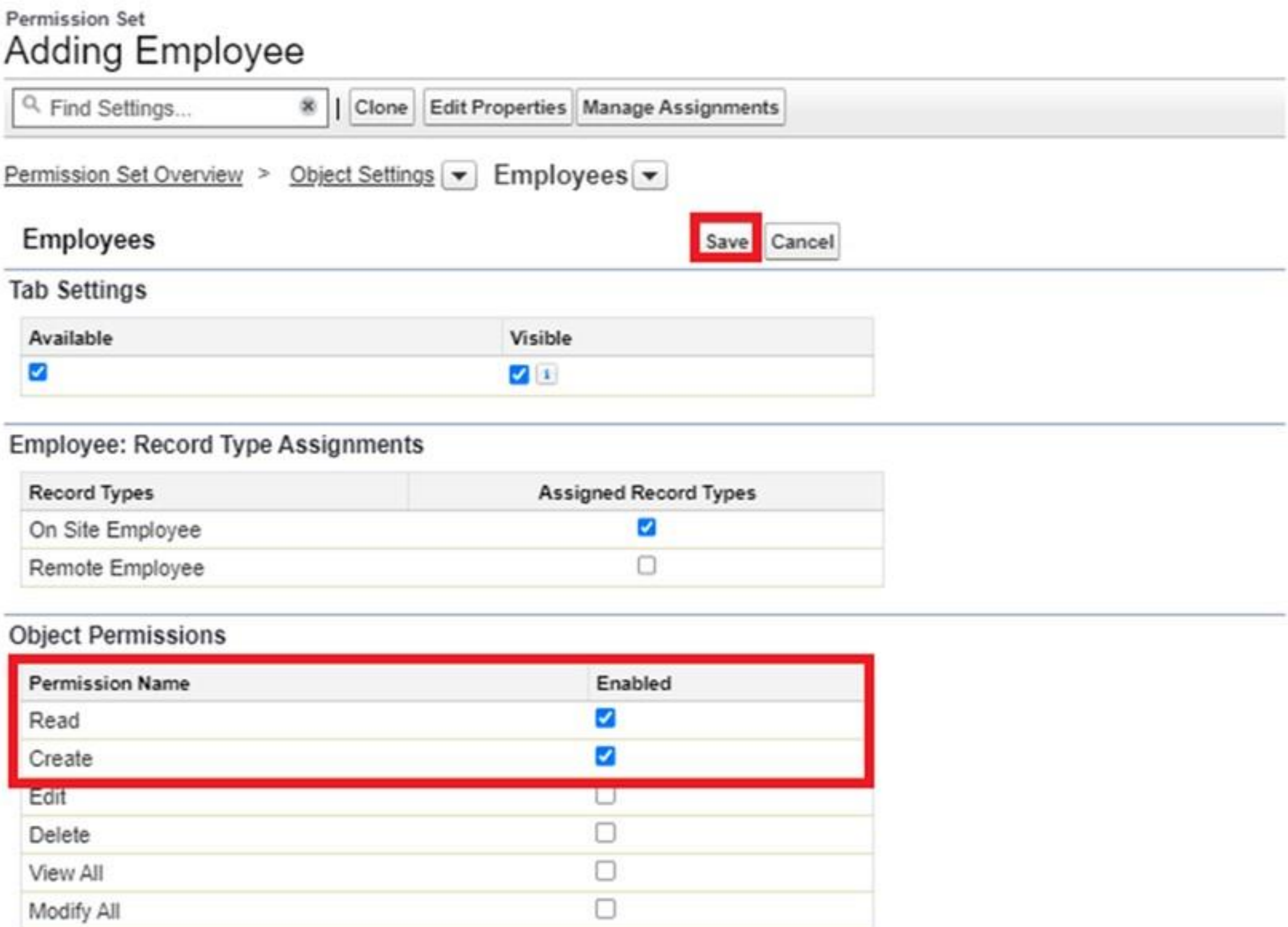
2. Enter the label name as "Per to Emp" --> Save.



3. Under Apps Select object settings.

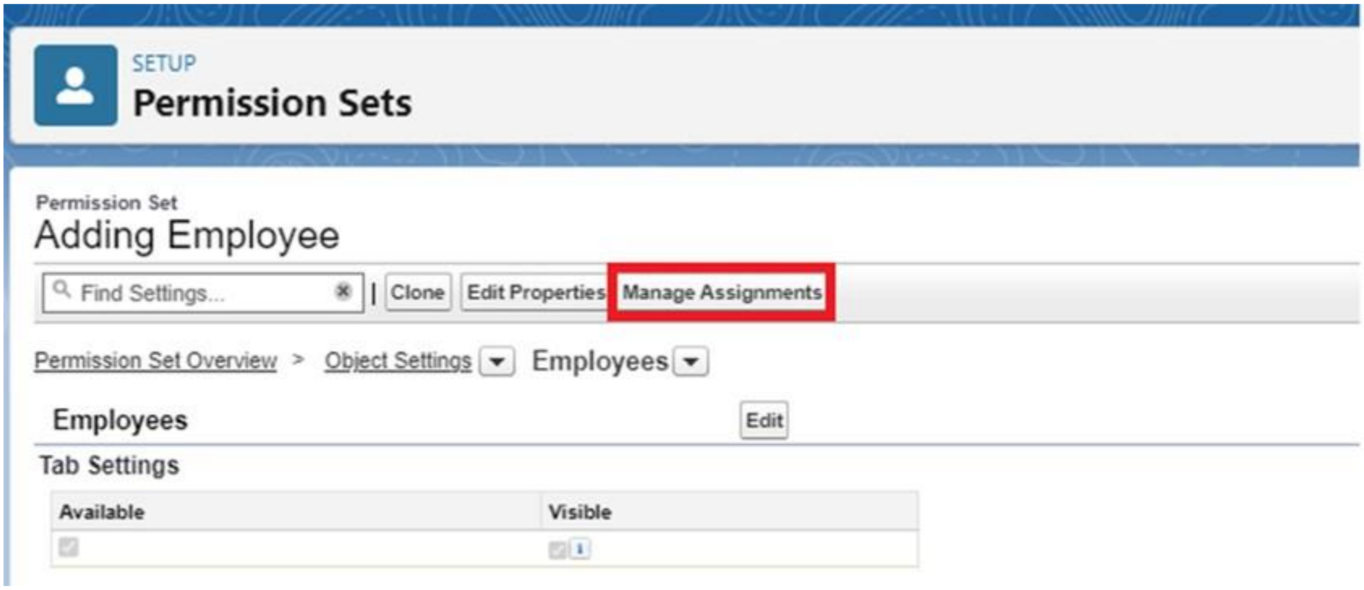


4. Click on Employee object --> click on Edit --> under object permission checkfor read and create.

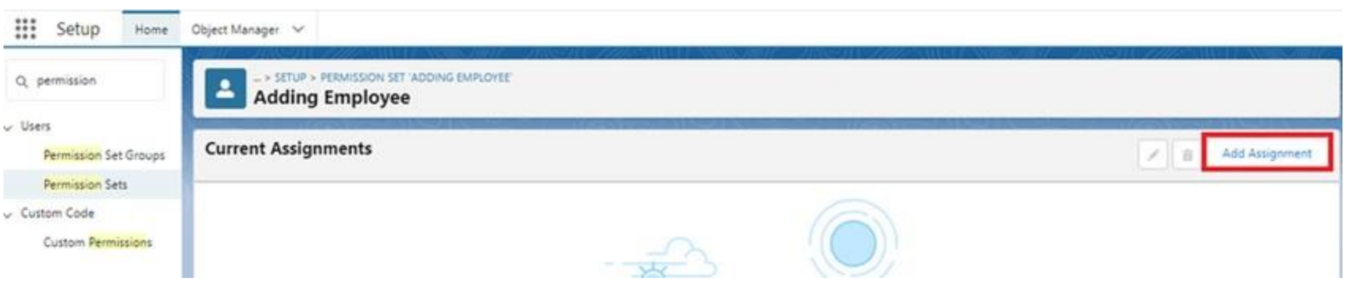


5. Click on Save.

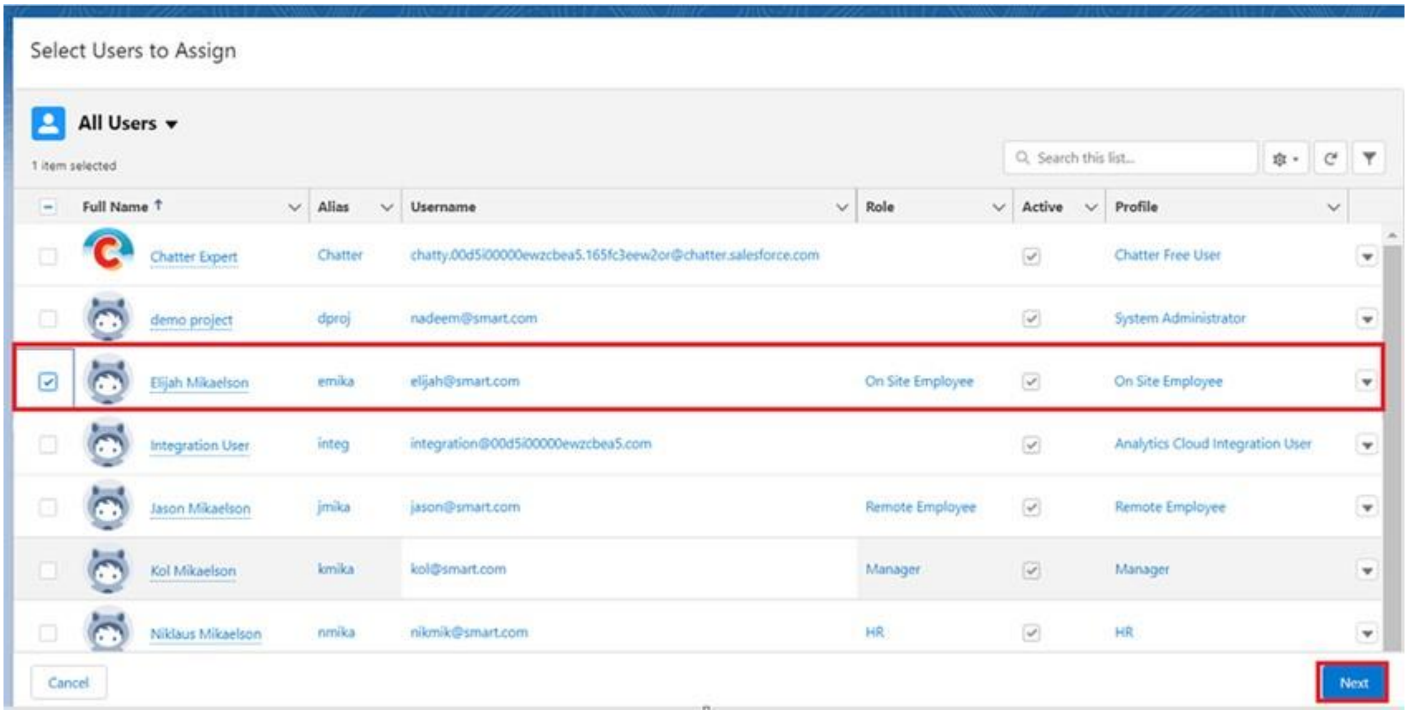
6. After saving the permission click on the Manage assignment



7. Now click on the Manage Assignment.



8. Click on Add Assignment.



9. Now select the users(any one user with the profile “On Site Employee”) andclick on Next.
10. Click on Assign11. 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-tounderstand 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

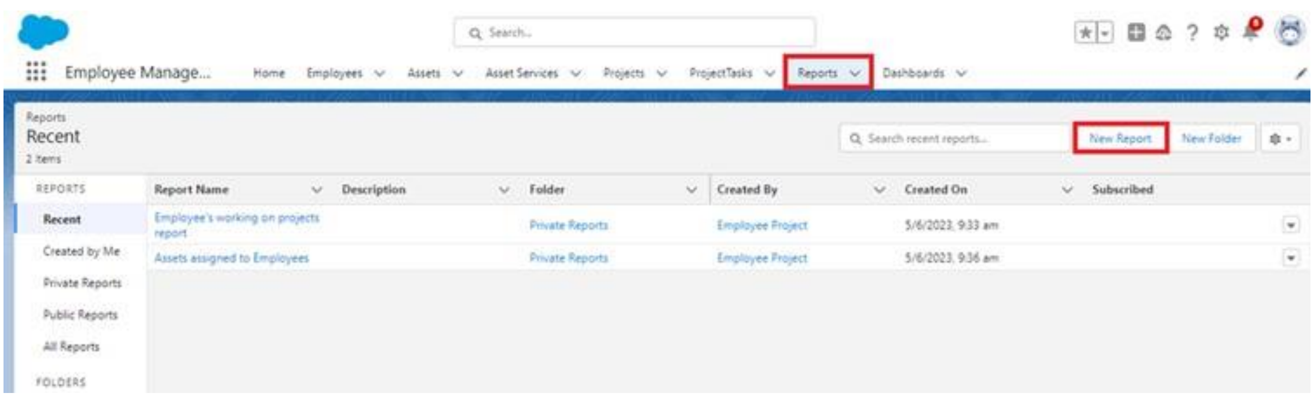
3. Matrix
4. Joined Reports

Activity 1: Create Report

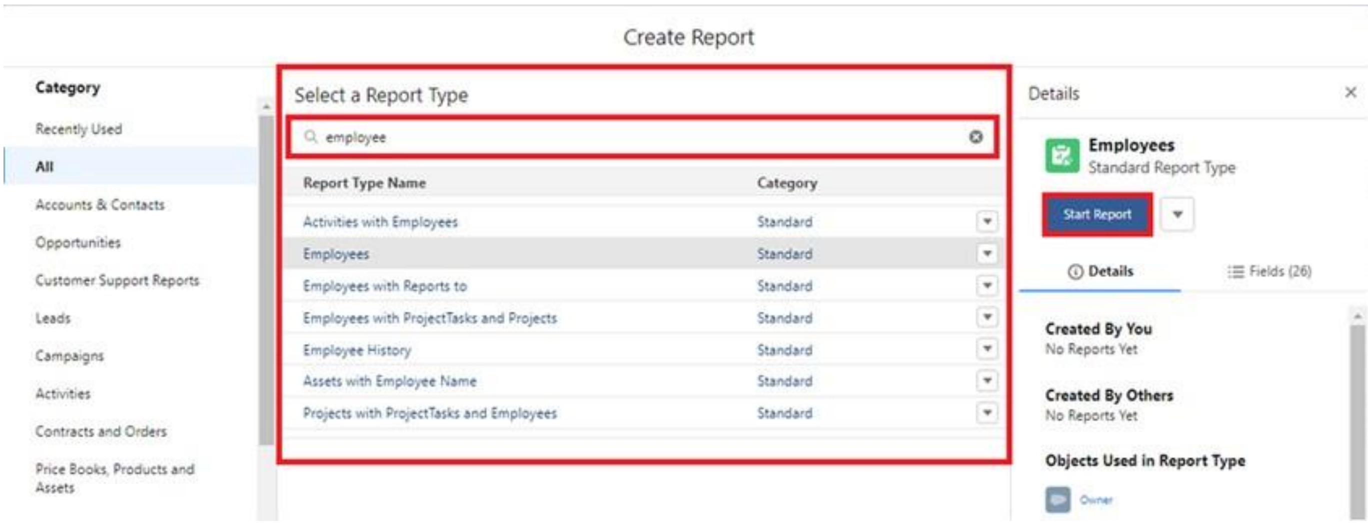
To Create a Report:

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

2. Click New Report.

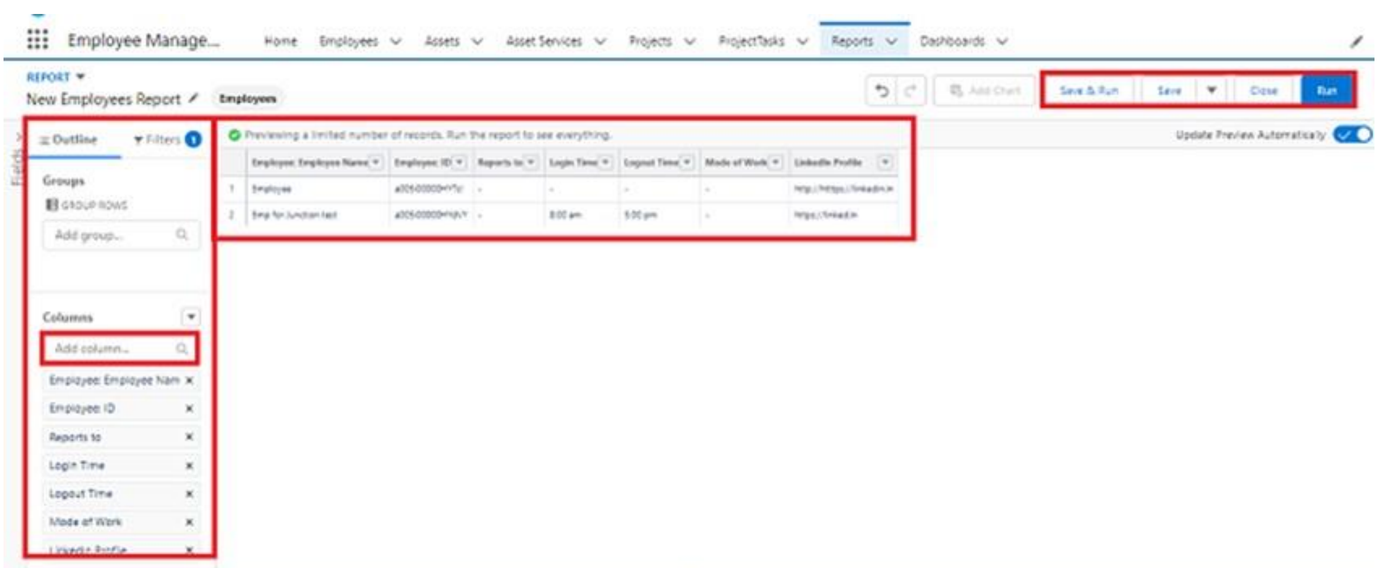


3. Select report type from category or from report type panel or fromsearch panel --> click on start report.



4. Customize your report

   --> Add fields from left pane as shown below



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”.

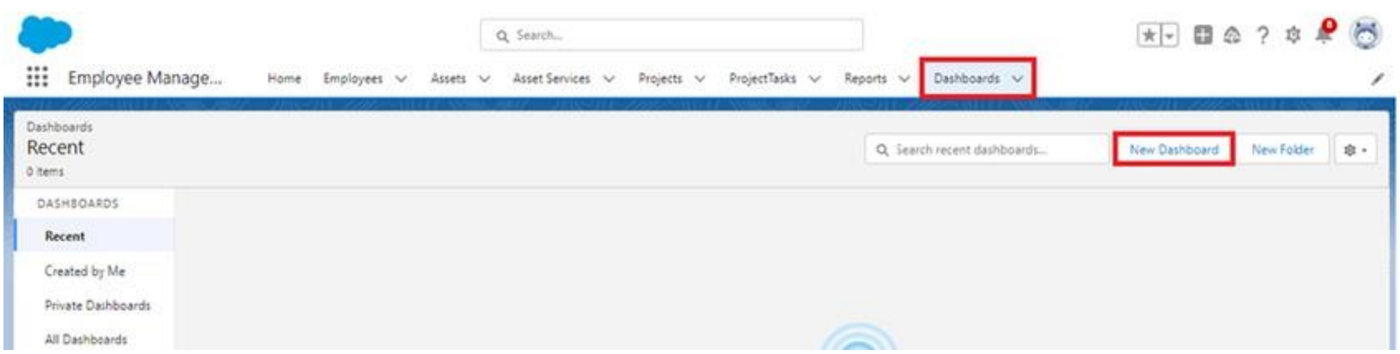
Dashboards

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.

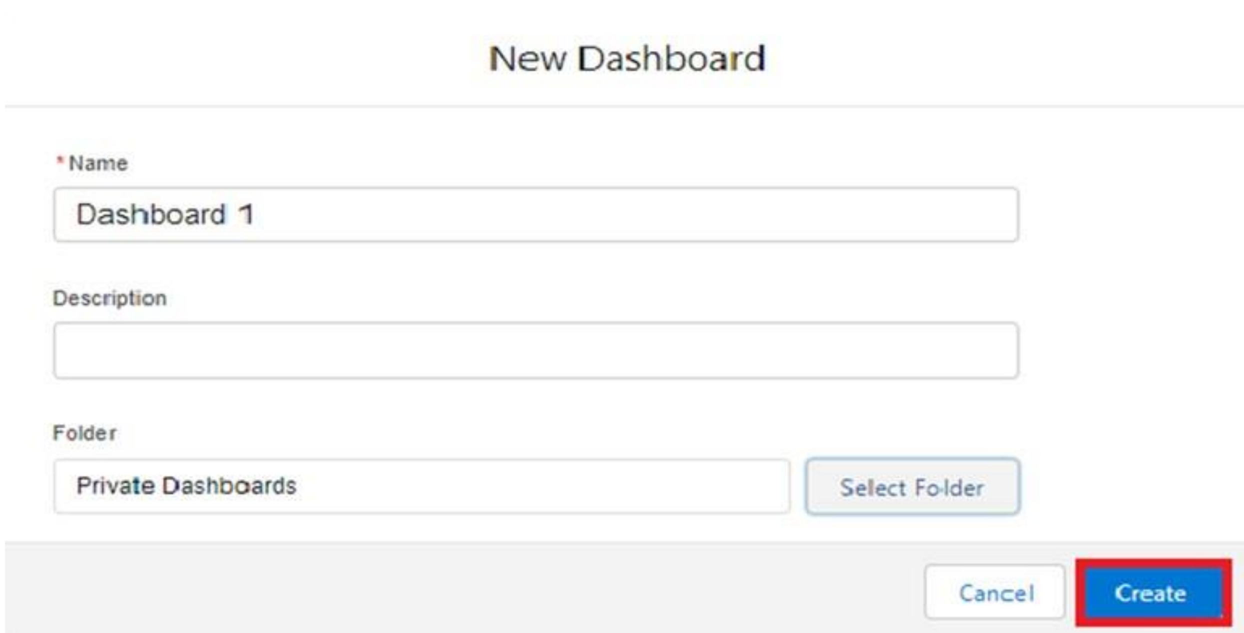
Activity 1: Create Dashboard

To Create a Dashboard

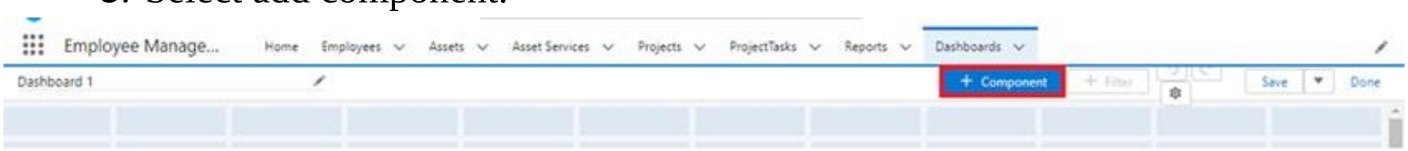
1. Go to the app --> click on the Dashboards tabs.



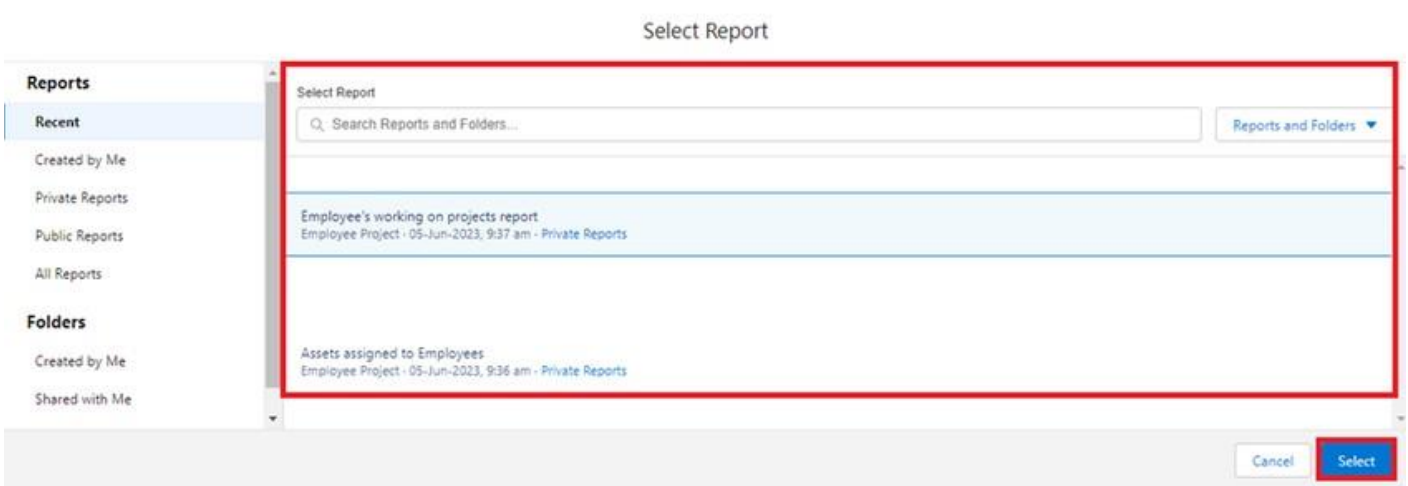
2. Give a Name and click on Create.



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 toreview 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” fromthe 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”.

Conclution:

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.