

NAAN MUDHALVAN

PROJECT REPORT

on

[SALESFORCE]

**STREAMLINED EMPLOYEE
DETAIL MANAGEMENT**

TEAM LEADER – VIDHU BALA M

NM ID - ABEE835167D3E4CBF004EDF4C47D5921

TEAM MEMBER1 – AFRIN BANU S

NM ID – F3DAB179189B752B3484325969C8BCE2

TEAM MEMBER2 – PADMA S E

NM ID – 7CE7DEA45A13E7EB524452CFDDCDCF0F

TEAM MEMBER3 – SWETHA P

NM ID – 324D13DE0893F9E9633432251D7032FC

Developer (Short Term)

Introduction:

The Streamlined Employee Detail Management project aims to develop and implement a comprehensive system for efficient management of employee information within an organization.

Project Goals:

- Streamline the process of capturing, updating, and accessing employee details, reducing administrative overhead and time spent on data management tasks.
- Improve the accuracy and integrity of employee information by implementing validation checks and automating data entry processes.
- Provide authorized personnel with easy and secure access to employee information, reducing the time required to retrieve critical data.

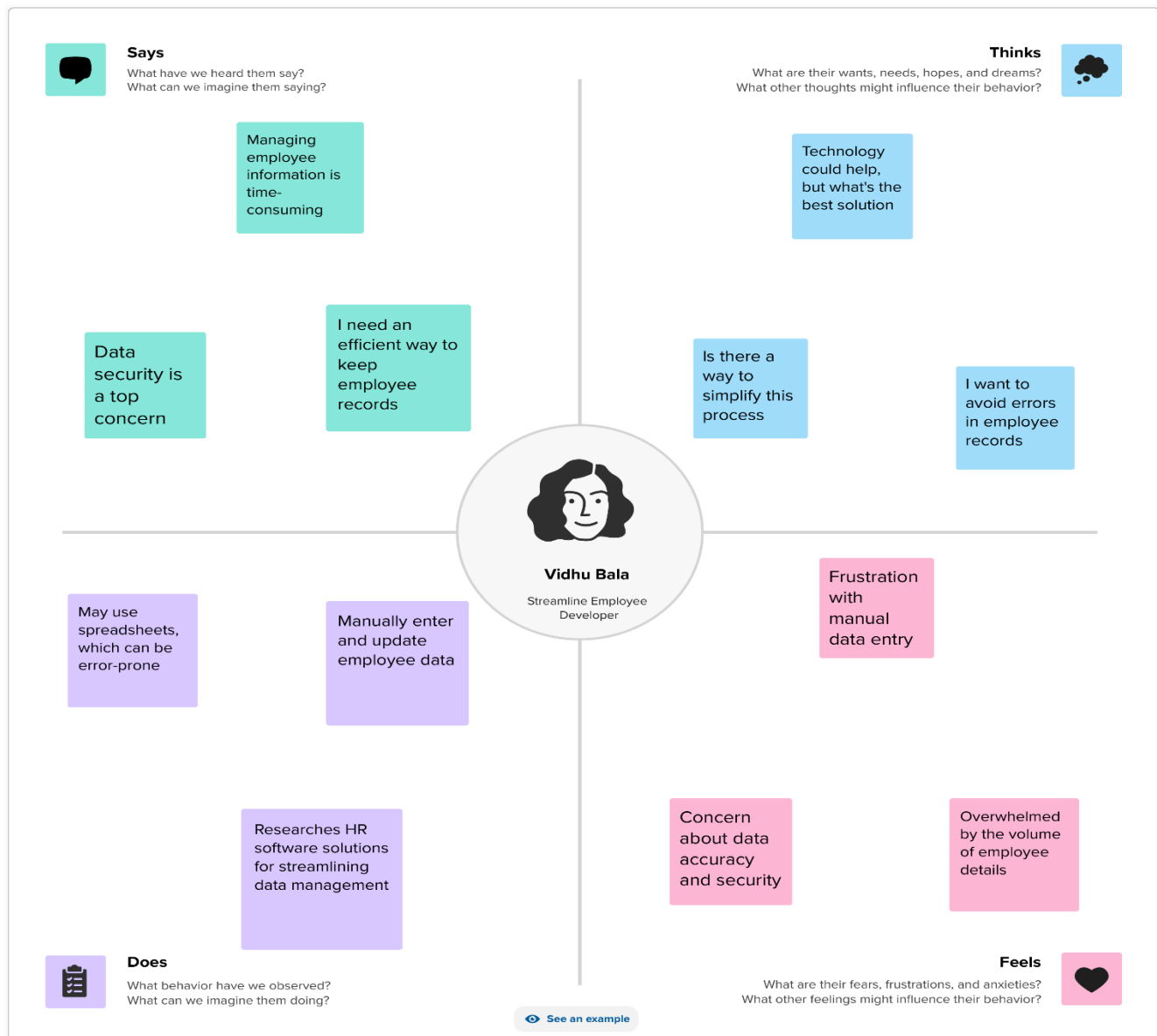
Scope:

- Enhance accessibility to employee information for authorized personnel.
- Provide comprehensive document management capabilities.
- Integrate with existing HR systems and software.
- Achieve cost efficiency in HR operations.

Problem Definition & Design Thinking:

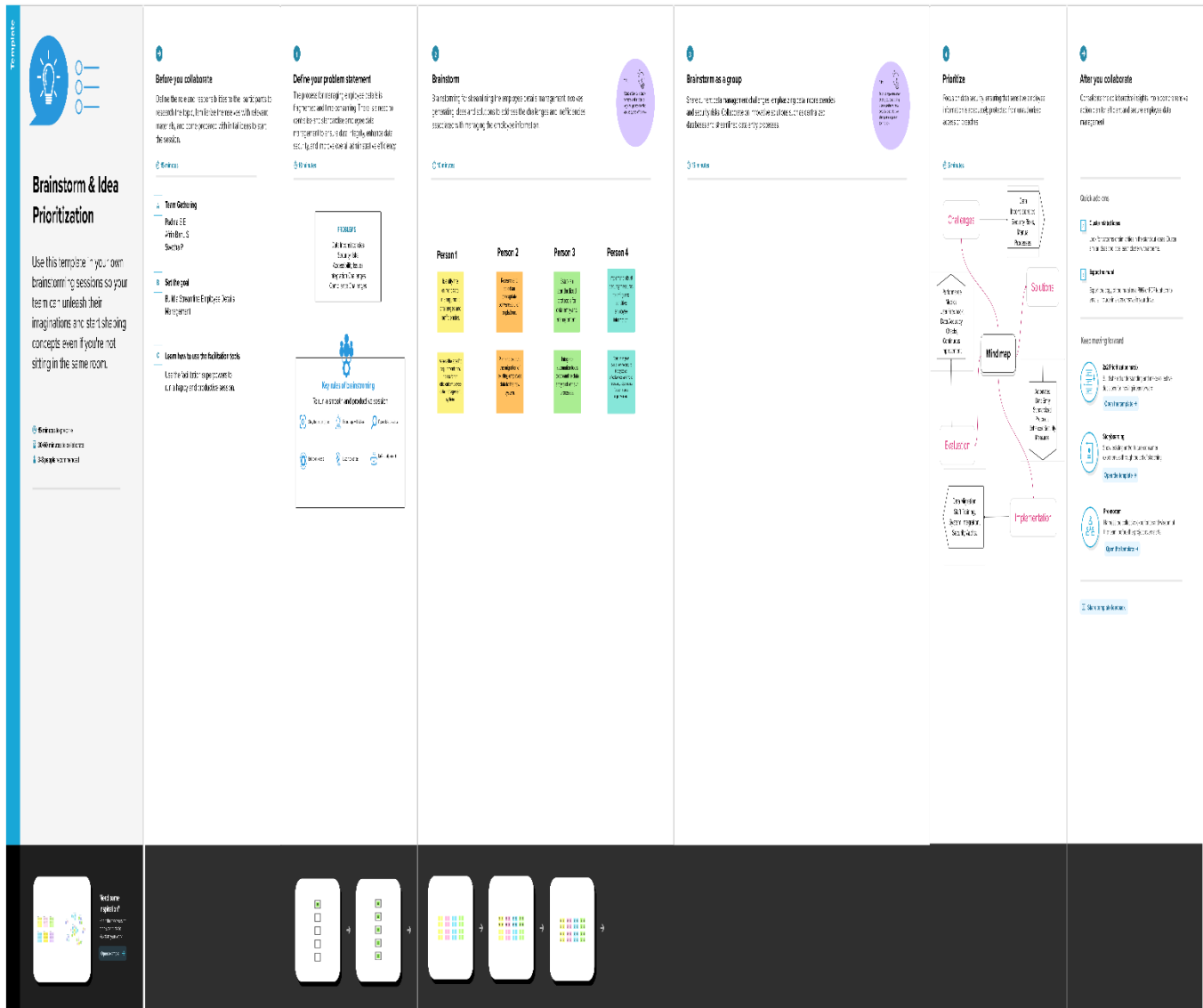
Empathy Map:

Understanding the needs and pain points of users, including educators, HR professionals, and administrators, to create a user-focused system.



Ideation & Brainstorming:

Generating creative solutions to address the identified challenges, using brainstorming and collaboration.



Milestone- 01 [Creation of developer account]

1. Go to developers.salesforce.com/signup
2. Click on sign up.
3. On the sign up form, enter the following details:
 - a) First name: **Vidhu**
 - b) Last name: **Bala**
 - c) Email: **vidhubalam122002@gmail.com**
 - d) Role: **Developer**
 - e) Company: **Ponjesly College of Engineering**
 - f) Country: **India**
 - g) Postal Code: **629161**
 - h) Username: **vidhubalam@ponjesly.com**

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First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Country/Region*
Country/Region

Postal Code*
Your postal code

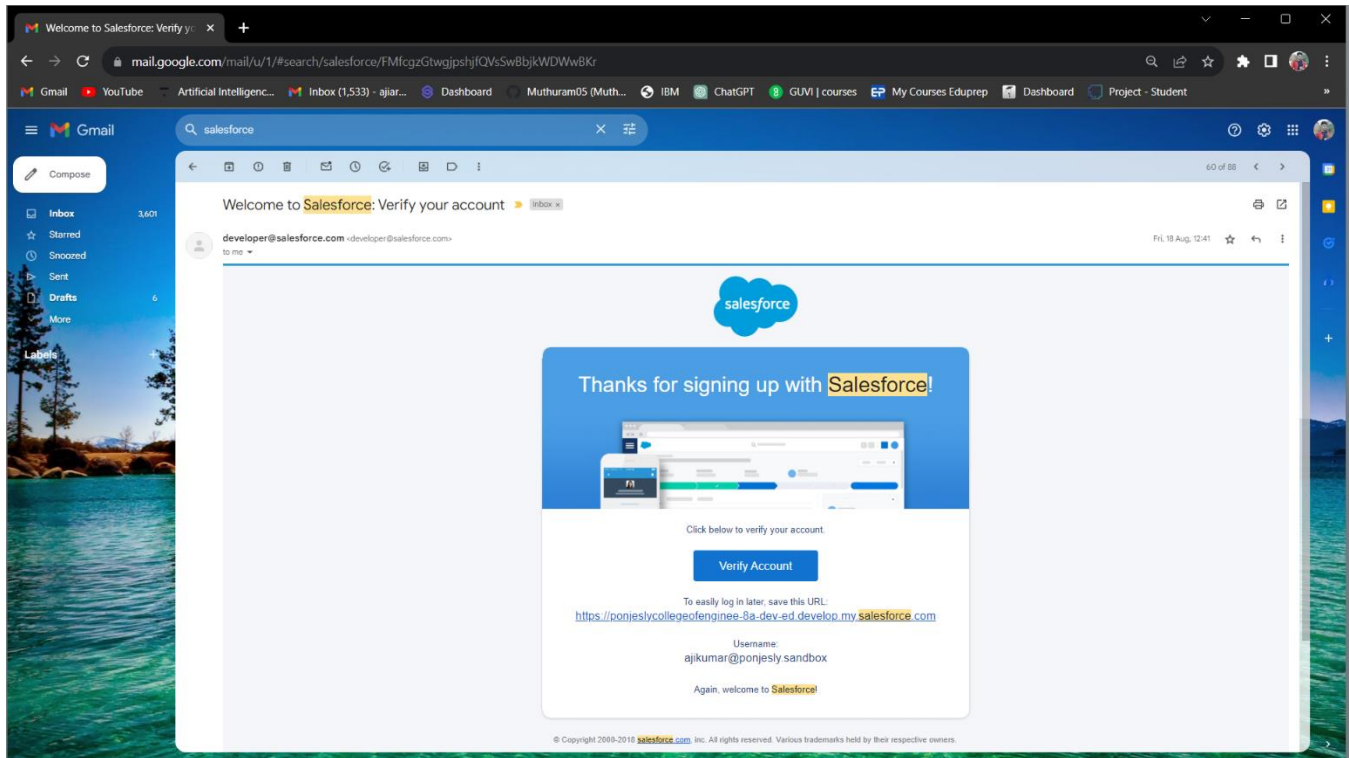
Username*
[name@company.sandbox]
Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login username. Read more about username recommendations.

☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.

Sign me up

Account Activation

Go to the inbox of the email that you used while signing up.
Click on the verify account to activate your account.



Login to Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.


Login | Salesforce

- Student

Welcome to Salesforce: Verify y...

(3) WhatsApp

ponjeslycollegeofenginee-b1-dev-ed.develop.my.salesforce.com/?ec=301&startURL=%2Fvisualforce%2Fsession%3Furl%3Dhttps%253A%252F%252Fponjeslycollegeofenginee-b1-d...



You've been logged out due to inactivity.

Username

1 Saved Username

vidhubalam@ponjesly.com

Password

••••••

Log In

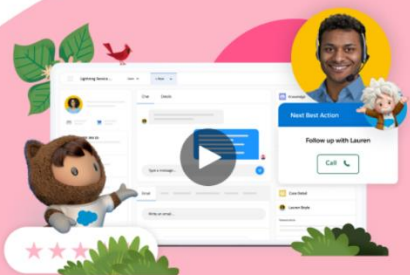
☒ Remember me

[Forgot Your Password?](#)

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Search

ENG IN 19:00 30-10-2023

Home | Salesforce

- Student

Welcome to Salesforce: Verify y...

(3) WhatsApp

ponjeslycollegeofenginee-b1-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home



Search Setup

Setup Home Object Manager

Setup

Quick Find

Setup Home

Service Setup Assistant

Commerce Setup Center

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

javascriptvoid(0);

SETUP Home

Create



Get Started with Einstein Bots

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Get Started



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Learn More



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Most Recently Used

10 items

NAME	TYPE	OBJECT
Vidhu Bala	User	
LeaveTrigger		
Apex Trigger		
Leave		

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Search

ENG IN 18:48 30-10-2023

Milestone- 02 [Object Creation]

Creating Employee Object:

1. From the setup page >>> Click on Object Manager >>> Click on Create >>>Click on Custom Object.
2. Enter the label name>>> Employee
3. Plural label name>>> Employees
4. Enter Record Name Label and Format
 - Record Name >>> Employee Name
 - Data Type >>>Text
5. Click on Allow reports and Track Field History and Allow Activities.
6. Allow search >>>**Save.**

Create objects as **Organization, Health Insurance, and Leave.**

Object Name - Employee

App Manager | Salesforce x Custom Tabs - Salesforce - Dev x Custom Object: Employee - Sal x User: Vidhu Bala - Salesforce - x Student

ponjeslycollegeofengineer-b1-dev-ed.develop.my.salesforce.com/0115j000002rcXr?setupid=CustomObjects

salesforce Search... Switch to Lightning Experience Vidhu Bala Setup Help Content

Home Chatter Libraries Content Subscriptions +

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Tell Me More Check Readiness

Quick Find / Search... Expand All | Collapse All

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Get Started

Salesforce Mobile Quick Start

Home

Administrator
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile

Custom Object
Employee

Standard Fields (4) | Custom Fields & Relationships (0) | Validation Rules (0) | Page Layouts (1) | Field Sets (0) | Compact Layouts (1) | Buttons, Links, and Actions (0) | Record Types (0) | Apex Sharing Reasons (0) | Apex Sharing Recalculation (0) | Object Limits (10)

Custom Object Definition Detail Edit Delete

	Singular Label	Plural Label	Object Name	API Name	Description
	Employee	Employees	Employee	Employee__c	Enable Reports ✓
					Track Activities ✓
					Allow in Chatter Groups <input type="checkbox"/>
					Allow Sharing ✓
					Allow Bulk API Access ✓
					Allow Streaming API Access ✓
					Track Field History ✓
					Enable Licensing <input type="checkbox"/>
					Deployment Status Deployed
					Allow Search <input type="checkbox"/>
					Help Settings Standard salesforce.com Help Window
					Modified By Vidhu Bala, 28/10/2023, 1:04 pm

Created By Vidhu Bala, 28/10/2023, 1:04 pm

Standard Fields

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History
--------	-------------	------------	-----------	-------------------	---------	---------------

32°C Mostly cloudy 13:39 28-10-2023

Object Name - Leave

Leave | Salesforce x Email Alert - V1 x Employee Detail x Recently Viewed x Vidhu Bala | Sal x Student x Welcome to Sal x (3) WhatsApp x

ponjeslycollegeofengineer-b1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002rbwS/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Leave

Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Details Edit Delete

Description

API Name
Leave__c
Custom
✓

Singular Label
Leave

Plural Label
Leaves

Enable Reports ✓
Track Activities ✓
Track Field History ✓
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

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Milestone- 03 [Tabs Creation]

1. Go to setup page >>> type Tabs in Quick Find bar >>> click on tabs >>> New (under custom object tab)
2. Select Object(Employee) >>> Select the tab style>>>Next (Add to profiles page) keep it as default >>> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

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Quick Find / Search...
Expand All | Collapse All

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started

Salesforce Mobile Quick Start

Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates

New Custom Object Tab

Step 1 of 3: Enter the Details

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: Employee

Tab Style: People

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description

Description

Next Cancel

31°C Mostly cloudy

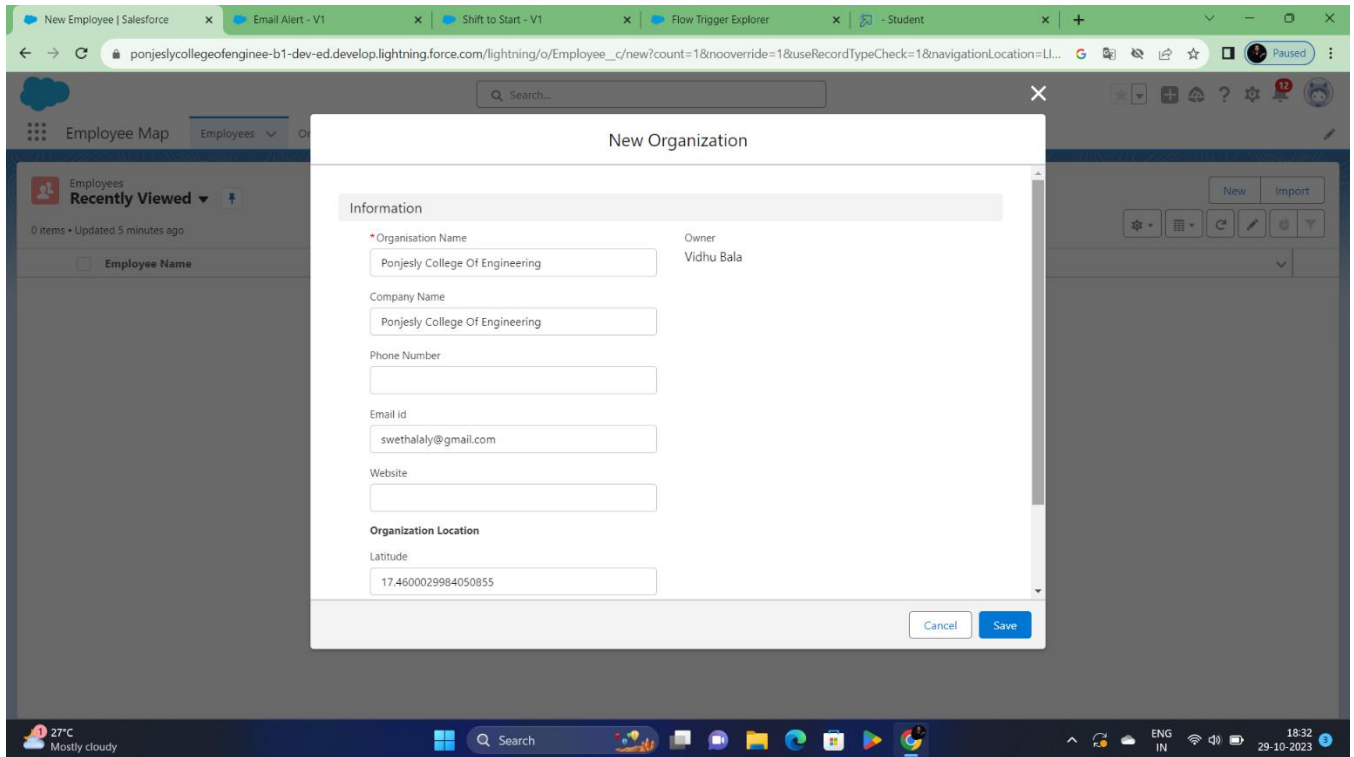
Search

ENG IN

13:14 28-10-2023

Milestone- 04 [Create App]

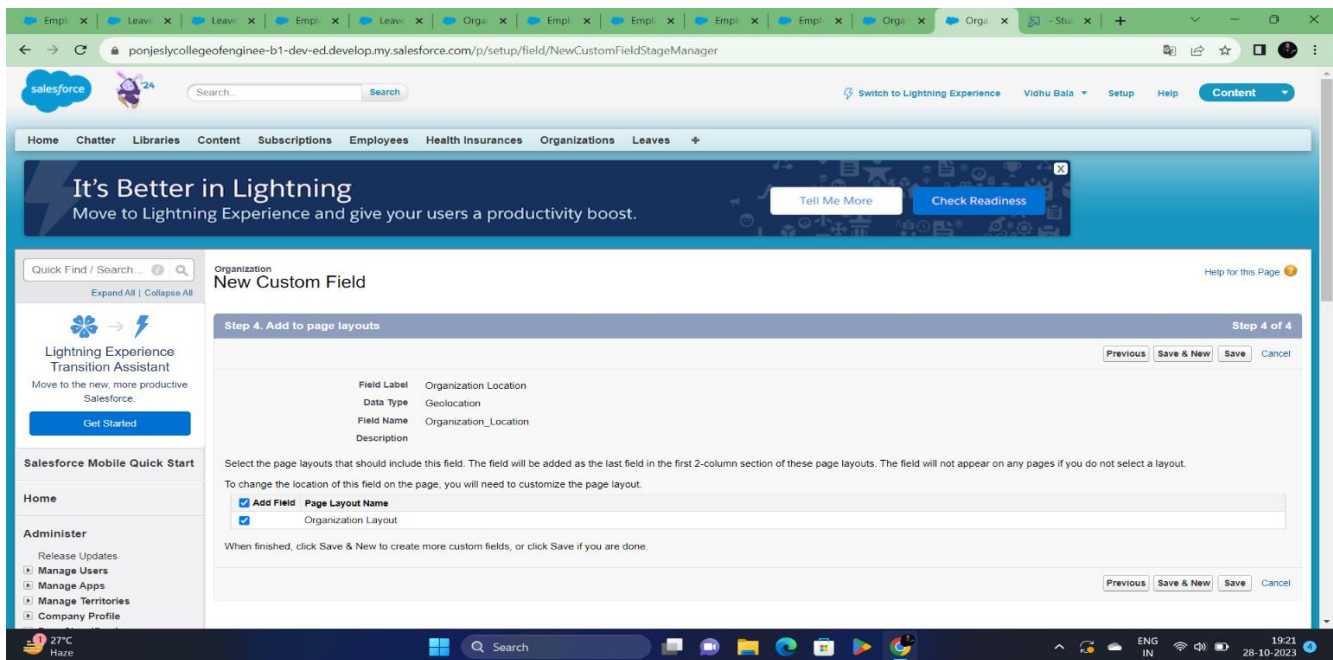
1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter **Employee Mapp** as the App Name, then click next
4. Under App Options, leave the default selections and click next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select **Employee, Organization, Health Insurances, Leave** and move them to Selected Items.
7. Click Next.
8. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



Milestone- 05[Fields & Relationships]

Creation of Text Field for the “Organization” Object

1. Go to setup>>>click on Object Manager>>>type object name(Organization) in quick find bar>>>click on the object.
2. Now click on “Fields & Relationships”>>> New
3. Select Data type as “Text”.
4. Click on Next
5. Fill the above as following:
 - Field Label: Company Name
 - Length : 80
 - Field Name : gets auto generated
 - Click on Next>>>Next>>>Save and new.



Milestone- 05[Email Templates]

Creation of Email Templates:

1. Go to App launcher >>> click on Email Template.
2. Click on “Email Templates” >>> New Email Template.
3. Email Template Name is “Emergency Leave Approved”
4. Related Entity Type >>> Employee
5. Description “Your emergency leave was approved”.
6. Folder “Public Email Templates”.
7. Subject “Your Emergency leave was approved”
8. In the HTML text enter the given information and click save.

The screenshot shows the Salesforce Email Template Builder interface. The browser address bar displays the URL: `porjeslycollegeofengineer-b1-dev-ed.develop.lightning.force.com/lightning/r/EmailTemplate/00X5j000000qm8EEAQ/view`. The page title is "Emergency Leave Approved". The interface includes a navigation bar with tabs for "Details" and "Related". The "Details" tab is active, showing the following information:

Information	
Email Template Name	Emergency Leave Approved
Description	Your emergency leave request was approved
Made in Email Template Builder	<input type="checkbox"/>
Related Entity Type	Employee
Folder	Public Email Templates

The "Message Content" section is also visible, showing the subject "Your emergency leave request was approved" and the HTML value "Dear {{{Employee__c.Name}}}". The body text includes:

I hope this email finds you well. We wanted to inform you that your emergency leave request has been approved.

Please ensure that all pending tasks are delegated, and you have completed any necessary handovers before proceeding on your leave.

During your absence, if any urgent matters arise or if there is a need for any further assistance, please contact the Manager.

Milestone- 06[User]

Creating A User:

- 1.First Name: Vidhu
- 2.Last Name: Bala
- 3.Email id: vidhubalam122002@gmail.com
- 4.Username: vidhubalam@ponjesly.com
- 5.Nick Name: Sreekutty
- 6.Profiles: Standard Platform User
- 7.Save.

The screenshot displays the Salesforce 'All Users' page. The left sidebar contains navigation links for Home, Chatter, Libraries, Content, Subscriptions, Employees, Health Insurances, Organizations, and Leaves. The main content area shows a list of users with the following columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The user 'Vidhu Bala' is listed with the username 'vidhubalam@ponjesly.com' and the role 'System Administrator'. Other users listed include Banu S. Afrin, Chatter Expert, Marc, Rachael, P. Swetha, S.E. Padma, User Integration, and User Security.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Bala, Vidhu	VBala	vidhubalam@ponjesly.com		✓	System Administrator
<input type="checkbox"/> Edit	Banu S. Afrin	abanu	afinbanu@ponjesly.com		✓	Standard Platform User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5j00000chngeaf@hrzjizy1xt@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Marc, Rachael	rmarc	rachealmarc@bluefin21.com	SVP, Human Resources	✓	Standard Platform User
<input type="checkbox"/> Edit	P. Swetha	sq	swethalaly@ponjesly.com		✓	Standard Platform User
<input type="checkbox"/> Edit	S.E. Padma	ps.e	padma@ponjesly.com		✓	Force.com - App Subscription User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5j00000chngeaf.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5j00000chngeaf.com		✓	Analytics Cloud Security User

Milestone- 07[Approval Process]

Create Approval Process:

1. Go to setup >>> Approval Processes in quick find bar>>> click on it.
2. Manage Approval Process For >>> “Leave” from the drop down.
3. Click on “Create New Approval Process” >>> Use standard setup wizard.
4. Process Name “Emergency Leave Approval” >>> Click Next.
5. Field “Leave:Leave Type” >>> Operator : equals, Value >>> Click on the lookup filter icon and select “Emergency Leave”.
6. Click insert field,then click Next.
7. Field “Leave:Leave Type” >>> Operator : equals, Value >>> Click on the lookup filter icon and select “Emergency Leave”.
8. Next Automated Approver determined by “Manager” from the drop down.Use approver field of leave owner should be marked as check
9. Select the “Administrators ONLY can edit records during the approval process”.Then Next.
- 10.Under the Approval Assignment Email Template click in the lookup icon>>>Lightning >>> Public Email Templates “Emergency Leave Approved”.Then Next.Once you have saved your approval process, while on the same page click the approval process.
13. At the approval steps, Click on “New Approval Step”.
14. Enter the name as “Approver1” the unique name will automatically be updated.Then Next.

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

16. Automatically assign to approvers is to be selected. User: from the lookup give the user.

17. “Approve or reject based on the FIRST response” is to be selected. Then click save.

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

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

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

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

Milestone- 07[Flows]

Create Flows for Email Alert:

1. Go to setup >>> type Flow in quick find box >>> Click on the Flow and Select the New Flow.
2. Select the record Triggered flow.Click on create.
3. Under Object select "Leave". Click on A record is created or updated.Actions and Related Records, Done.
4. Select Free Form Layout for the flow and then Click on the Manager option, You will find "New Resource"
5. "Text Template"
6. Label it as "Leave Mail". And mention the given details
Dear {!\$Record.Employee__r.Name}
7. Drag the "Action" element from the toolbox onto the screen .
8. Under Category dropdown select Email, Then in the action bar select "Send Email"action.
9. Give API name as "Email Alert".

Flows | Salesforce x Shift to Start - V2 x Approval Processes x Vidhu Bala | Salesfor x - Student x Welcome to Salesfor x (1) WhatsApp x

ponjeslycollegeengineer-b1-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015j000001U4eOAAS

Flow Builder Shift to Start - V2

Free-Form Version 2: Active—Last modified 20 hours ago Run Debug View Tests Deactivate Save As Save

Toolbox

Elements Manager

Interaction (3)

- Action
- Subflow
- Custom Error

Logic (6)

- Assignment
- Decision
- Loop
- Transform (Beta)
- Collection Sort
- Collection Filter

Data (4)

- Create Records
- Update Records
- Get Records
- Delete Records

Get more on the AppExchange

Start
Record-Triggered Flow

Object: **Employee** Edit

Trigger: **A record is created or updated**

Optimize for: **Actions and Related Records**

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Employee

Run Immediately

Action
Shift Started

27°C Mostly cloudy 19:21 30-10-2023

Flows | Salesforce x Shift to Start - V2 x Approval Processes x Vidhu Bala | Salesfor x - Student x Welcome to Salesfor x (1) WhatsApp x

ponjeslycollegeengineer-b1-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015j000001U4eOAAS

Flow Builder Shift to Start - V2

Free-Form Version 2: Active—Last modified 20 hours ago Run Debug View Tests Deactivate Save As Save

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Object: **Employee** Edit

Trigger: **A record is created or updated**

Optimize for: **Actions and Related Records**

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Employee

Run Immediately

Action
Shift Started

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Milestone- 07[User Adoption]

Create Records for the Organization object:

1. Click on the organization Tab .Click on New.
2. Give the Organization name, email, phone all the fields are to be filled including organization location.
3. Make sure you fill the location in terms of latitude and longitude as shown below.

Then click save and new.(Similarly create more records in the organization object)

The screenshot shows a Salesforce Lightning Analytics report titled "Employees with Organizations". The report is displayed in a table format with columns for Shift Timings, Organization, and Employee. The data shows three employees: Swetha, Padma, and Afrin Banu, all associated with Ponjesly College Of Engineering. The report includes a search bar, a table with 3 records, and a summary row. The interface also shows a navigation bar with tabs for Employee Map, Employees, Organizations, Health Insurances, Leaves, Emergency Leave Approved, and Analytics. The bottom of the screen shows a Windows taskbar with the date 30-10-2023 and time 19:32.

Shift Timings	Organization: Organisation Name	Employee: Employee Name
10:00am-5:00pm (1)	Ponjesly College Of Engineering	Swetha
Subtotal		
5:00pm-12:00pm (1)	Ponjesly College Of Engineering	Padma
Subtotal		
7:00pm-2:00am (1)	Ponjesly College Of Engineering	Afrin Banu
Subtotal		
Total (3)		

Milestone- 08[Reports]

Go to the app >>> click on the reports tab

2. Click New Report.

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

4. Select report >>> Employees with Organizations with Travel Allowances , Then click on start report.

5. Once you click on start report you will see that the records you have created would be displayed.

6.Group the columns according to your preference from the dropdown as shown.

7. Save your report as Travel Allowance Report. And run it.

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

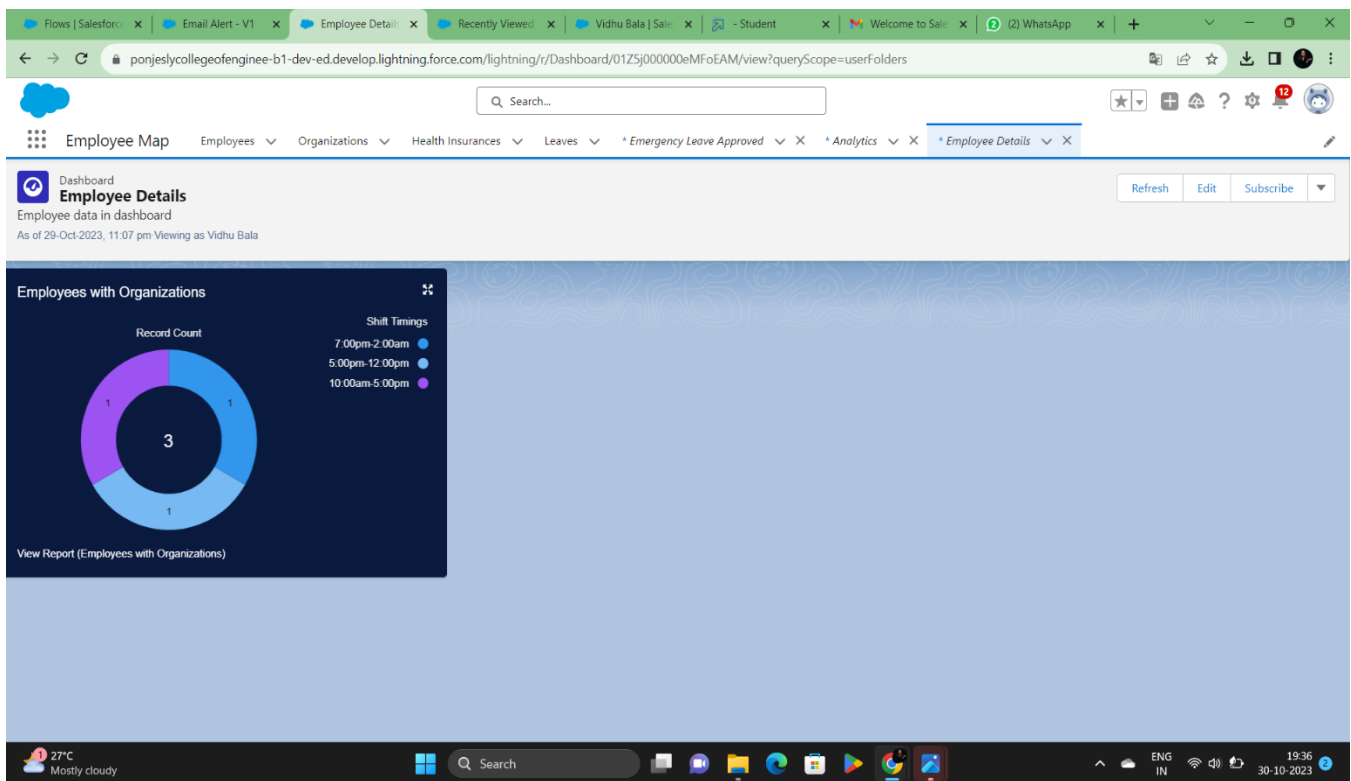
9. Similarly create a report for Leave with employee and save it as “Employee leave details”.

Milestone- 09[Dashboards]

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

2. Click New Report.

3. Select report type from category or from report type panel or from search panel >>> click on start report.
4. Select report >>> Employees with Organizations with Travel Allowances , Then click on start report.
5. Once you click on start report you will see that the records you have created would be displayed.
6. Group the columns according to your preference from the dropdown as shown.



Milestone- 10[Apex Classes and Triggers]

Creating Apex Classes

1. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
2. Enter the name “LeaveTriggerHandler” click ok.
3. Enter the given code in the console.

```
public class LeaveTriggerHandler {

    public      static      void      ifMaleEmployee(List<Leave__c>
leaveRequests) {
    // Fetch employees related to leave requests
    Set<Id> employeeIds = new Set<Id>();
    for (Leave__c leaveRequest : leaveRequests) {
        if (leaveRequest.Employee__c != null) {

            employeeIds.add(leaveRequest.Employee__c);
        }
    }

    // Fetch employee records
    Map<Id, Employee__c> employeesMap = new Map<Id,
Employee__c>([SELECT Id, Gender__c FROM Employee__c
WHERE Id IN :employeeIds]);

    // Check eligibility for maternity leave and gender
    for (Leave__c leaveRequest : leaveRequests) {
        if (leaveRequest.Leave_Type__c == 'Maternity Leave') {
```


1. Login to the trailhead account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
3. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Trigger.
4. Enter the name “LeaveTrigger” select the sObject from the list “leave__c”.

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

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

Apex TriggSalesforceApex ClassEmail AlertEmployeeRecentlyVidhu BalStudentWelcome(3) WhatsApp

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Privacy Center

Security Controls

Domain Management

Communication Templates

Translation Workbench

Data Management

Mobile Administration

Apex Trigger

LeaveTrigger

Help for this Page

Back to List

Apex Trigger Detail

EditDeleteDownloadShow Dependencies

Name	LeaveTrigger	sObject Type	Leave
Code Coverage	0% (0/3)	Status	Active
Created By	Vidhu Bala, 29/10/2023, 11:16 pm	Last Modified By	Vidhu Bala, 29/10/2023, 11:34 pm
Namespace Prefix			

Apex TriggerVersion SettingsTrace Flags

```
1 trigger LeaveTrigger on Leave__c (before insert) {
2
3   if(trigger.isBefore){
4
5     if(trigger.isInsert){
6       LeaveTriggerHandler.#MaleEmployee(trigger.new);
7     }
8   }
9 }
10
```

EditDeleteDownloadShow Dependencies

27°C
Mostly cloudy

Search

ENG
IN

19:41
30-10-2023

Demo Video Link:

https://youtu.be/CQ7iJPcGGzQ?si=UuiguSL7ecCrkYz_

Trailhead Url:

Team Leader: Vidhu Bala M

<https://www.salesforce.com/trailblazer/vidhubala>

Team Member1: Afrin Banu S

<https://www.salesforce.com/trailblazer/afrinbanus>

Team Member2: Padma S E

<https://www.salesforce.com/trailblazer/padmase>

Team Member3: Swetha P

<https://www.salesforce.com/trailblazer/swethapy7bwjzm9i9ys>