

WORKFORCE ADMINISTRATION SOLUTION

BY

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ABSTRACT

The Workforce Administration Solution represents a significant advancement in how organizations manage their employee-related processes, particularly in project assignment and asset tracking. As TheSmartBridge company transitions to Salesforce, a leading cloud technology platform, it aims to enhance data security, improve operational efficiency, and streamline system administration.

This document outlines the key features and benefits of the Workforce Administration Solution, detailing how Salesforce's robust capabilities support the centralized management of employee data, project involvement, performance tracking, and asset assignments.

In this context, the transition to Salesforce addresses critical challenges associated with traditional data management systems. By utilizing Salesforce's cloud infrastructure, TheSmartBridge ensures the safe storage of sensitive employee information through advanced encryption techniques and proactive backup mechanisms. The platform's automated data replication capabilities offer enhanced protection and effective disaster recovery solutions, safeguarding organizational data against potential threats.

Moreover, the scalability of Salesforce resources allows TheSmartBridge to optimize system performance, ensuring fast and reliable access to crucial data. This transformation not only simplifies administrative tasks but also reduces system complexity, enabling system administrators to concentrate on higher-value activities that drive productivity.

Each of these elements plays a vital role in creating a comprehensive workforce administration framework that supports data-driven decision-making and enhances organizational effectiveness.

Key learning objectives of this project include real-time project management, effective data modeling, application creation, user interface customization, bulk data importing, security best practices, group collaboration tools, and the generation of insightful reports and dashboards

Ultimately, the Workforce Administration Solution is designed to empower TheSmartBridge to achieve greater operational efficiency, improve employee performance tracking, and optimize asset management processes, establishing a foundation for future growth and success in a dynamic business environment.

This document serves as a comprehensive guide to the project, providing insights into the methodologies employed, the technologies leveraged, and the anticipated outcomes of this transformative initiative.

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INTRODUCTION

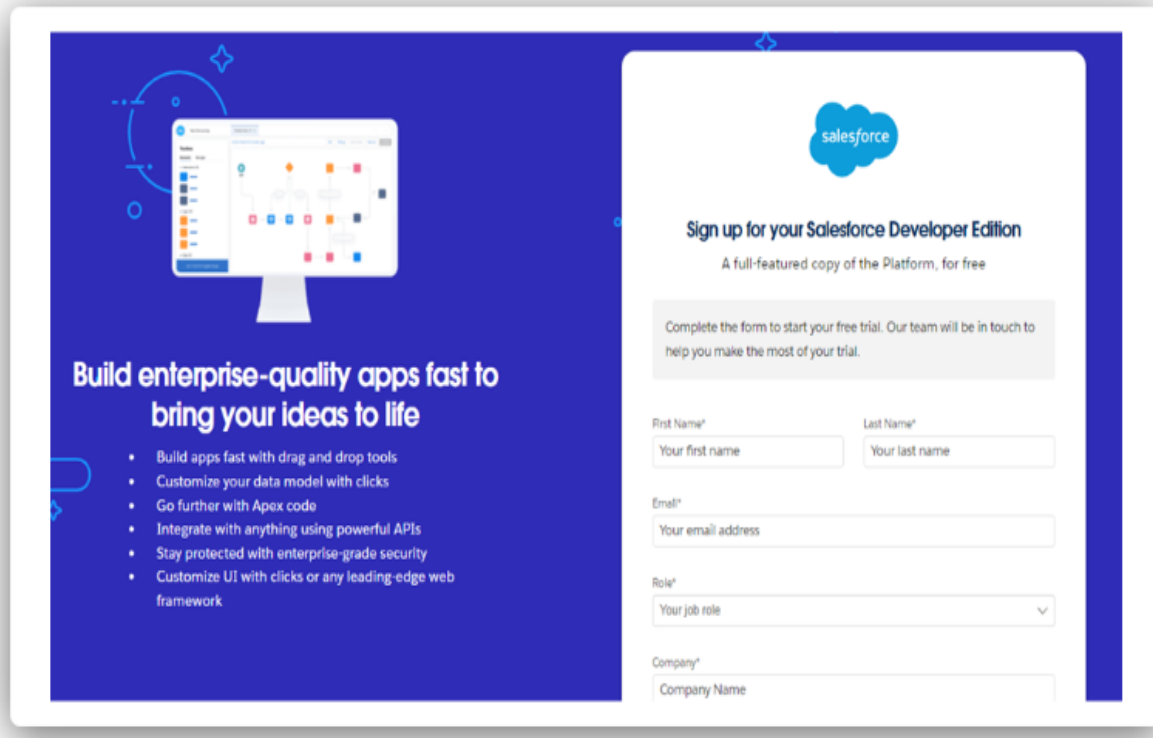
In today's fast-paced business environment, effective workforce management is crucial for success. TheSmartBridge recognizes the need to innovate and enhance its employee management processes, particularly in project assignments and asset tracking. To achieve this, the organization is embarking on a transformative journey by implementing the Workforce Administration Solution using Salesforce. This initiative aims to centralize employee data, streamline operations, and provide real-time insights that drive productivity.

By leveraging Salesforce's powerful capabilities, TheSmartBridge will not only improve operational efficiency but also foster a culture of collaboration and data-driven decision-making. This project is designed to empower employees, enabling them to perform at their best while ensuring that the organization can scale and adapt to future challenges. With the first step being the creation of a Salesforce Developer Edition account, TheSmartBridge is poised to harness cutting-edge technology to meet its unique business requirements and propel the organization toward greater success.

TASK 1: Creating Developer Account

To create a Salesforce Developer Edition account, visit the Salesforce Developer website and click on "Sign Up." Fill in the required fields, including your name, email address, and company information, and agree to the terms of service. Once you submit the form, you will receive a confirmation email.

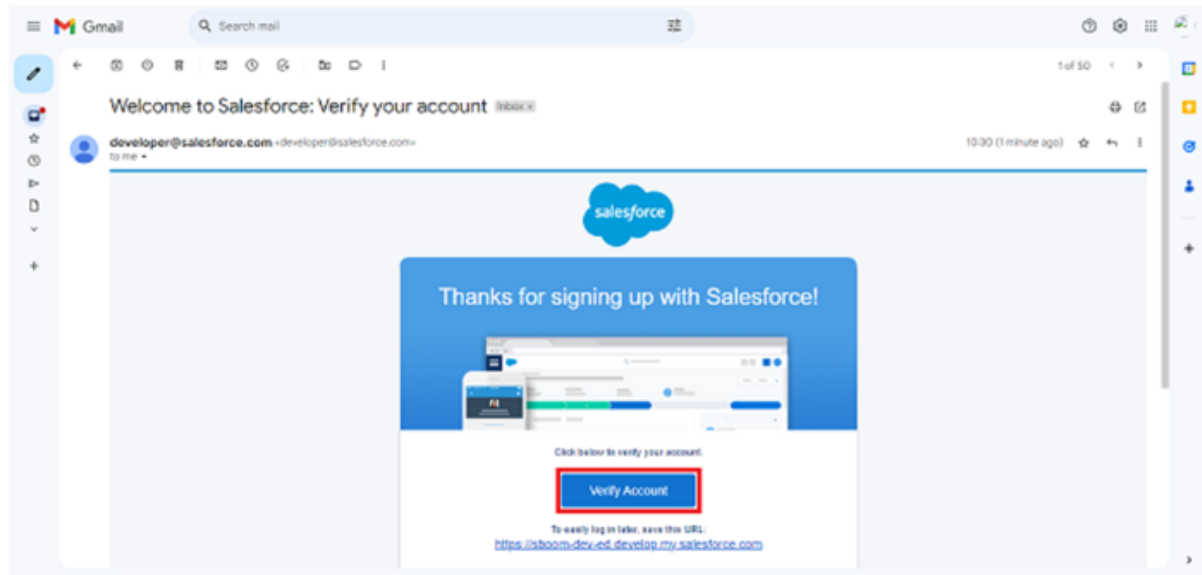
Click on the link in the email to verify your account, and then set your password. After that, you can log in to your new Developer Edition account using your email and the password you just created. This account will provide you with access to Salesforce's powerful development tools, allowing you to experiment, build, and customize solutions tailored to TheSmartBridge's needs. (<https://developer.salesforce.com/signup>)



- **First Name & Last Name**
Enter your first and last name in the respective fields.
- **Email**
Provide a valid email address. (Note: This doesn't need to be an actual email) you can give anything in the format : username@organization.com
- **Role**
Select "Developer" from the role options.
- **Company**
Input your college name as the company.
- **Country**
Choose "India" from the country dropdown menu.
- **Postal Code**
Enter your postal code (pin code).
- **Username**
Create a username by combining your name and college name (e.g., firstname.collegename).
- **Sign Up**
Click on the "Sign Me Up" button to complete the registration process.

TASK 2: Account Activation

1. Check the inbox of the email address you used to sign up. Look for the verification email and click on the link to activate your account. It may take 5-10 minutes for the email to arrive.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.

Change Your Password

Enter a new password for **lead@sb.com**.
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

Setup

Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Search Setup

Home

Create

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

OBJECTS

Salesforce objects are essentially database tables that allow organizations to store and manage their unique data. There are two main types of Salesforce objects:

1. **Standard Objects:** These are built-in objects provided by Salesforce, including essential elements like users, contracts, reports, and dashboards. They come ready to use and cater to common business needs.
2. **Custom Objects:** These are tailored objects created by users to capture specific information vital to their organization. Custom objects play a crucial role in applications, providing a framework for organizing and sharing data that is unique to each business.

In summary, Salesforce objects help organizations efficiently manage their data, whether it's standard information provided by Salesforce or customized details specific to their operations.

Creating an object within your Salesforce organization is vital for effective data management and process automation. By defining custom objects, businesses can tailor their data structure to meet specific needs, leading to streamlined workflows, personalized reporting, and an improved user experience. These objects form the backbone of how critical information is organized and utilized within Salesforce.

As an Admin for TheSmartBridge, you play a key role in ensuring that data is stored and managed according to the organization's requirements.

Navigating to the Setup Page:

To get started, simply click on the gear icon and select **Setup**. This is your gateway to customizing and optimizing your Salesforce environment!

TASK 1: Create Employee Object

Employee Custom Object

The Employee custom object is designed to monitor employee activities and track both individual and team progress effectively. This helps organizations stay organized and ensures that performance is measurable.

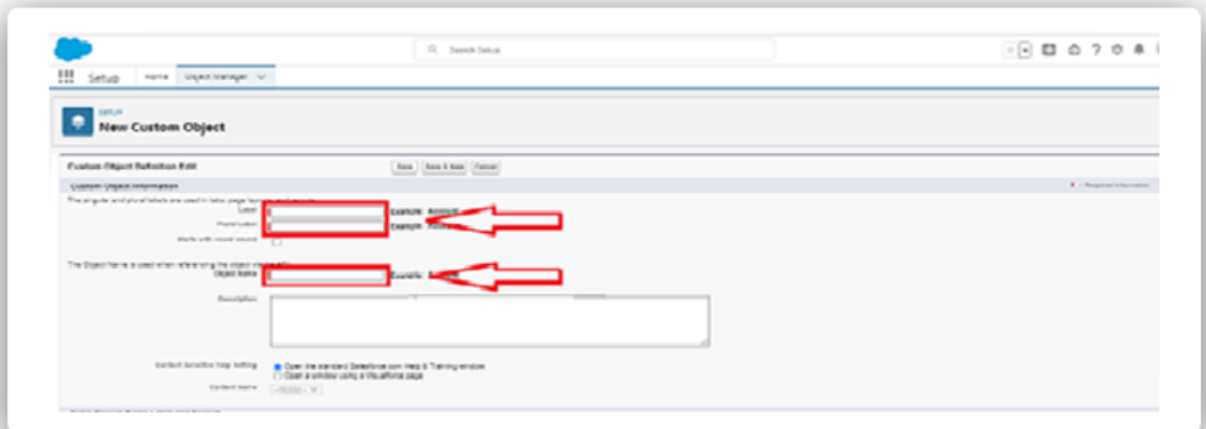
Steps to Create a Custom Object:

1. Go to the **Setup** page.
2. Select **Object Manager**.
3. Click on **Create**.
4. Choose **Custom Object**.

This process allows you to tailor your Salesforce environment to better meet your organization's needs!



- 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: Example: Account Name

Data Type: Example: A-{0000} [What Is This?](#)

Display Format:

Starting Number:

2. Click on Allow reports,
3. 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

TABS

Tabs are essential user interface elements in Salesforce that allow users to create and view records for various objects. Here are the main types of tabs you can use:

- 01 CUSTOM TABS
- 02 WEB TABS
- 03 VISUALFORCE TABS
- 04 Lightning component Tabs
- 05 Lightning page Tabs

- **Customtabs**

These are designed for custom objects and serve as the interface for custom applications in Salesforce, functioning similarly to standard tabs like Accounts or Contacts.

- **WebTabs**

Web Tabs allow you to display web content or applications directly within Salesforce. This enables quick access to frequently used external resources without leaving the Salesforce environment.

- **VisualforceTabs**

These tabs showcase Visualforce pages and behave like standard Salesforce tabs. They are useful for creating custom user interfaces tailored to specific needs.

- **LightningComponentTabs**

These tabs enable the inclusion of Lightning components in the navigation menu for both Lightning Experience and the Salesforce mobile app, enhancing user interaction.

- **Lightning Page Tabs**

Lightning Page Tabs provide access to Lightning Pages in the mobile app's navigation menu. Unlike other tabs, they do not appear in the All Tabs page or in the Available Tabs list when customizing your app.

TASK 1: Creating a Custom Tab (Employee)

To create a Tab:(Employee)

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

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.

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. Lightning Component tabs allow you to add Lightning components to the navigation bar. Lightning Pages 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

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: **None** **None** **Asset** **Asset Service** **Employee** **Project** **ProjectTask**

Tab Style: **None** **Asset** **Asset Service** **Employee** **Project** **ProjectTask**

(Optional) Choose a Home Page Custom Link: **None** **Asset** **Asset Service** **Employee** **Project** **ProjectTask**

Enter a short description:
Description:

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

- **Choose the Object:** Select Employee.
- **Select Tab Style:** Pick any desired tab style.
- **Proceed to Next Step:** Click Next.
- **Add to Profiles Page:** Leave the default settings as is and click Next.
- **Add to Custom App:** Keep the default settings and click Next.

Save Your Changes: Click Save to complete the process

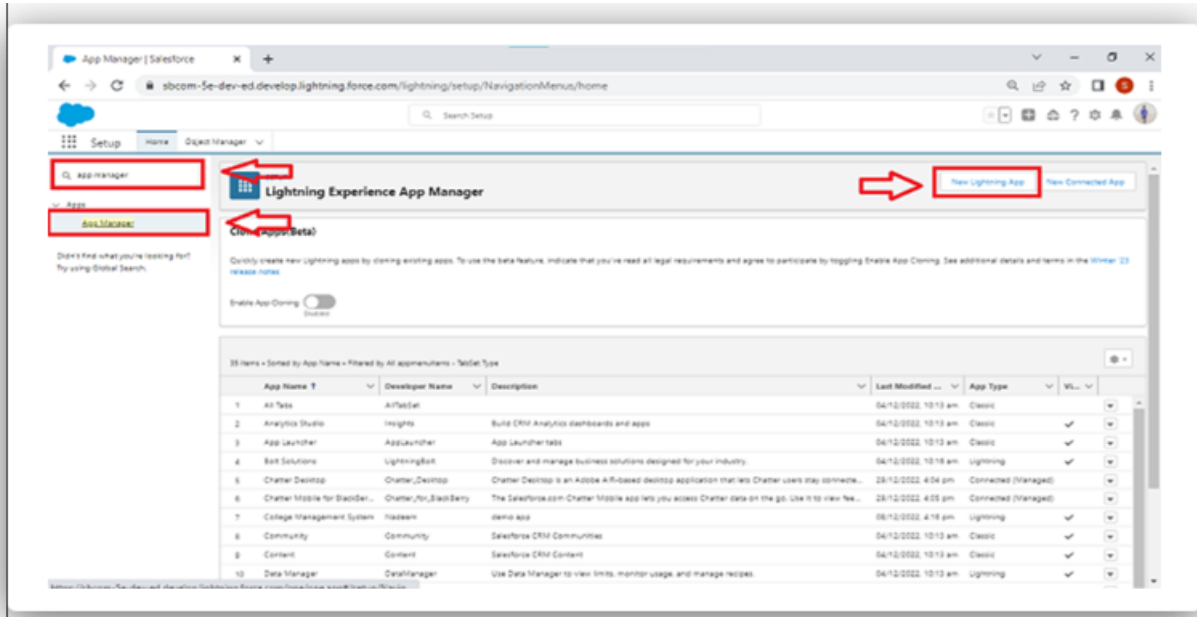
Activity 3: Creating tabs for remaining objects

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

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 --> (Utility Items) 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...

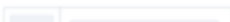
Description ⓘ
Enter a description...

App Branding

Image ⓘ
 Upload

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


Next

4. To Add Navigation Items:

Available Items

Create

Type to filter list...

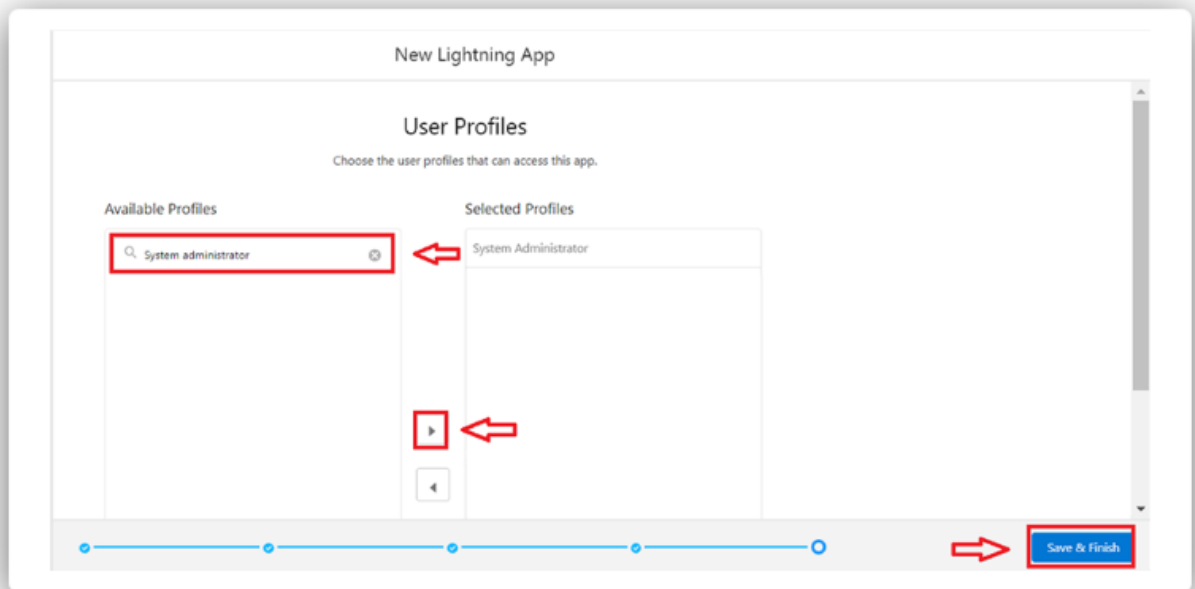
- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher

Selected Items

- Employees
- Projects
- ProjectTasks
- Assets
- Asset Services
- Reports
- Dashboards

Next

5. To Add User Profiles:

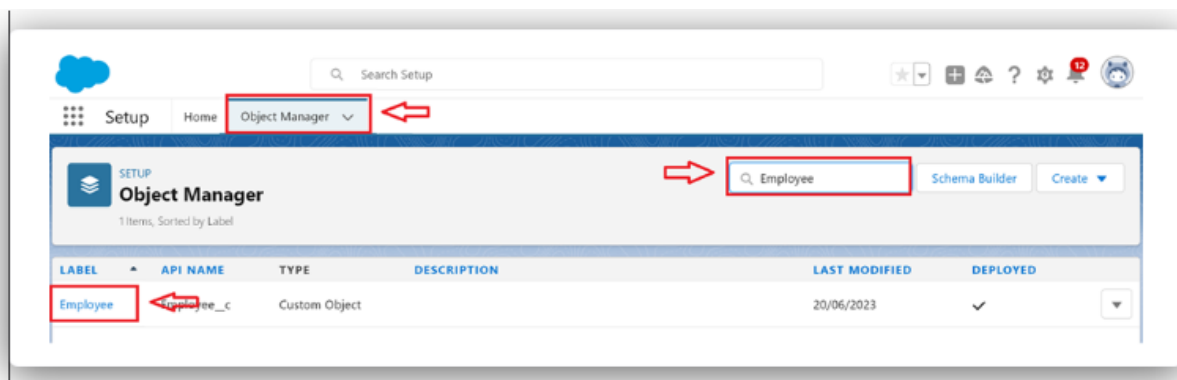


Search profiles (System administrator) in the search bar --> click on the arrow button --> save & finish.

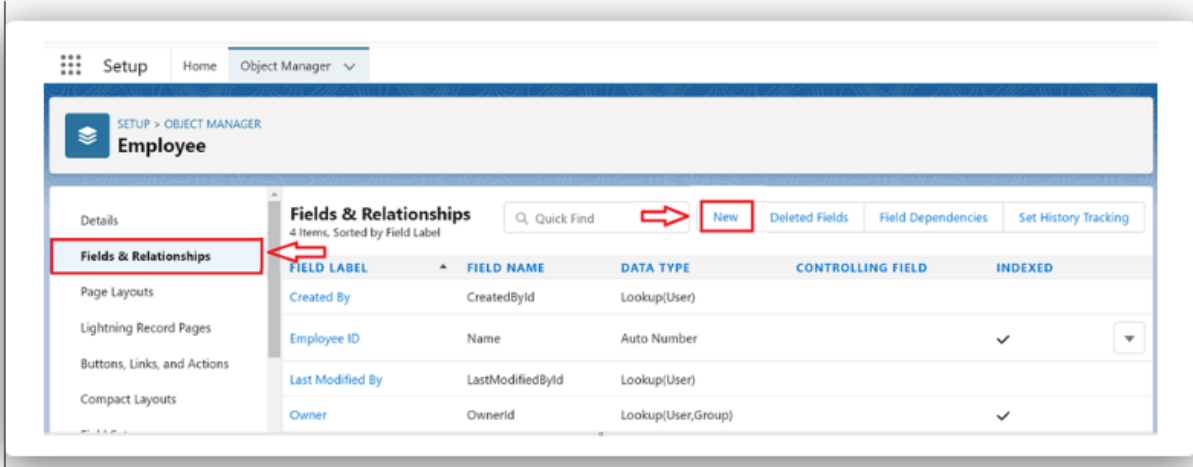
Activity 1 : Creating Text Field in Employee Object

To create fields in an object:

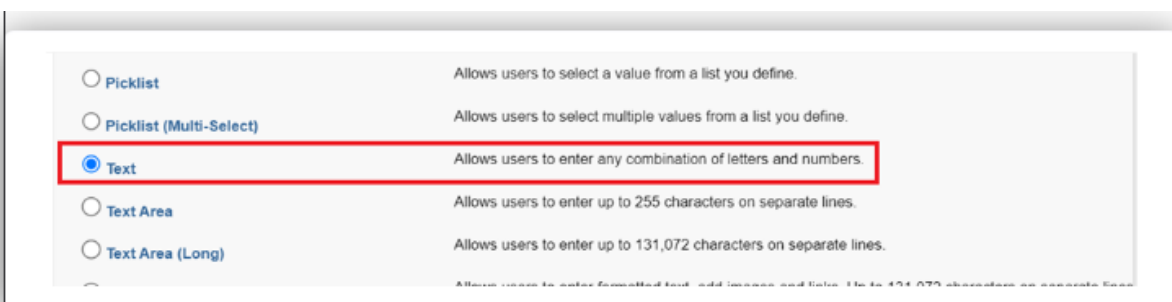
1. Go to setup --> click on Object Manager --> type object name(Employee) in quick find bar --> click on the object.



2. Now click on "Fields & Relationships" --> New



3. Select Data type as "Text".



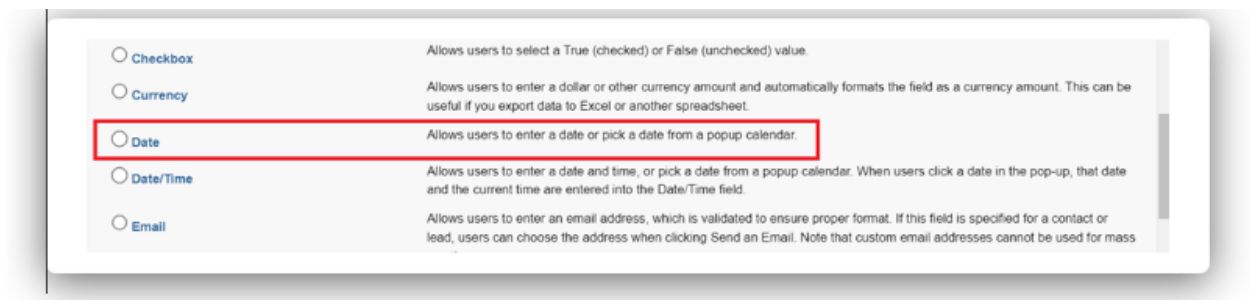
4. Click on Next



5. Fill the above as following:
 - 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.

Step 2. Choose output type

Field Label: Age

Field Name: Age

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

Formula Return Type

☐ None Selected

☐ Checkbox

☐ Currency

☐ Date

☐ Date/Time

☒ Number

Select one of the data types below.

Calculate a boolean value.
Example: {TODAY()} > CloseDate

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: {Gross Margin} = Amount - Cost_c

Calculate a date, for example, by adding or subtracting days to other dates.
Example: {Reminder Date} = CloseDate - 7

Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: {Next} = NOW() + 1

Calculate a numeric value.
Example: {Fahrenheit} = 1.8 * Celsius_c + 32

Previous Next

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

Step 3. Enter formula

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

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

Previous Next Cancel

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

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:

Previous Next Cancel

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.

Employee

New Relationship

Help for this Page

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Employee

Previous Next Cancel

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(ProjectTask) in the quick find bar --> 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.

Sl No	Object Name	Field	
		Field Name	Data type
		1 Qualification	Text
		2 Address	Text Area
		3 Experience	Text Area
		4 Phone no	Phone
		5 Email	Email
		6 Joining date	Date

1	Employee	<table><tr><td>7</td><td>Mode of Work</td><td>Picklist: Values</td></tr><tr><td></td><td></td><td><table><tr><td>On Site</td></tr><tr><td>Remote</td></tr></table></td></tr></table>	7	Mode of Work	Picklist: Values			<table><tr><td>On Site</td></tr><tr><td>Remote</td></tr></table>	On Site	Remote										
		7	Mode of Work	Picklist: Values																
				<table><tr><td>On Site</td></tr><tr><td>Remote</td></tr></table>	On Site	Remote														
		On Site																		
		Remote																		
		8	Cab Allowance	Check box																
		9	Food Allowances	Check box																
		10	Wifi Allowances	Check box																
		11	Cab Allowance Amount	Currency																
		12	Food Allowance Amount	Currency																
13	Wifi Allowance Amount	Currency																		
14	Login Time	Time																		
15	Logout Time	Time																		
16	LinkedIn Profile	url																		
2	Project	<table><tr><th colspan="2">Field Name</th><th>Data type</th></tr><tr><td>1</td><td>Project Name</td><td>Text</td></tr><tr><td>2</td><td>Project Lead</td><td>Text</td></tr><tr><td>3</td><td>Start Date</td><td>Date</td></tr><tr><td>4</td><td>End Date</td><td>Date</td></tr><tr><td>5</td><td>Project Status</td><td>Picklist: Values</td></tr></table>	Field Name		Data type	1	Project Name	Text	2	Project Lead	Text	3	Start Date	Date	4	End Date	Date	5	Project Status	Picklist: Values
		Field Name		Data type																
		1	Project Name	Text																
		2	Project Lead	Text																
		3	Start Date	Date																
		4	End Date	Date																
5	Project Status	Picklist: Values																		

			<div>Completed</div> <div>On Going</div> <div>Not Yet Started</div>

Setting OWD

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

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

Edit

1. Search for the Employee object.
2. Under default internal access and default external access change the options to “Private” and under grant access using hierarchies select the check box.
3. Click on save.

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

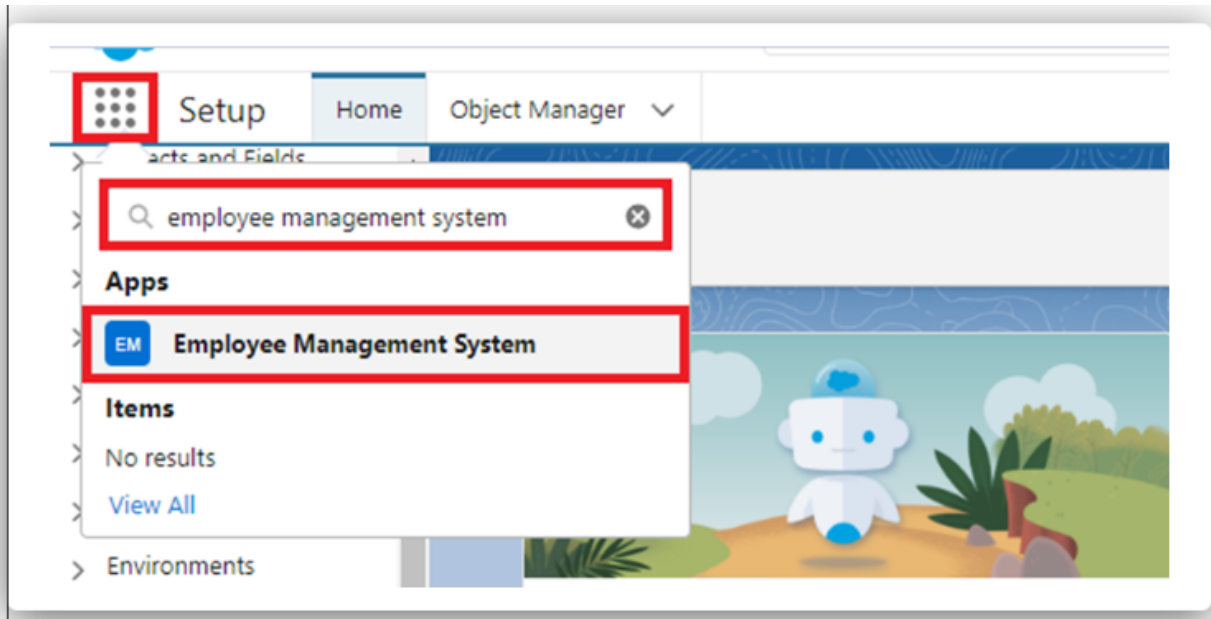
Save Cancel

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

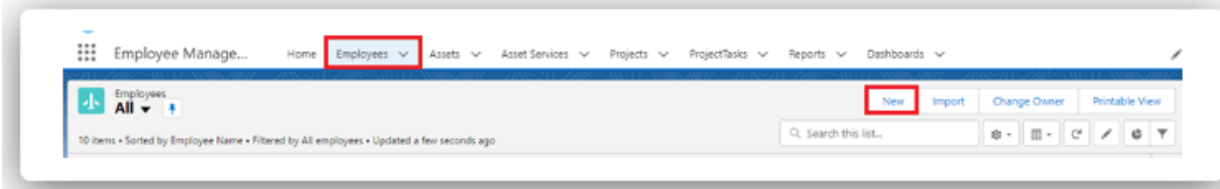
Activity 2:

Set OWD as Private for Project and Asset Service objects.

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



1. Click on the Employee tab.
2. Click New.



1. 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

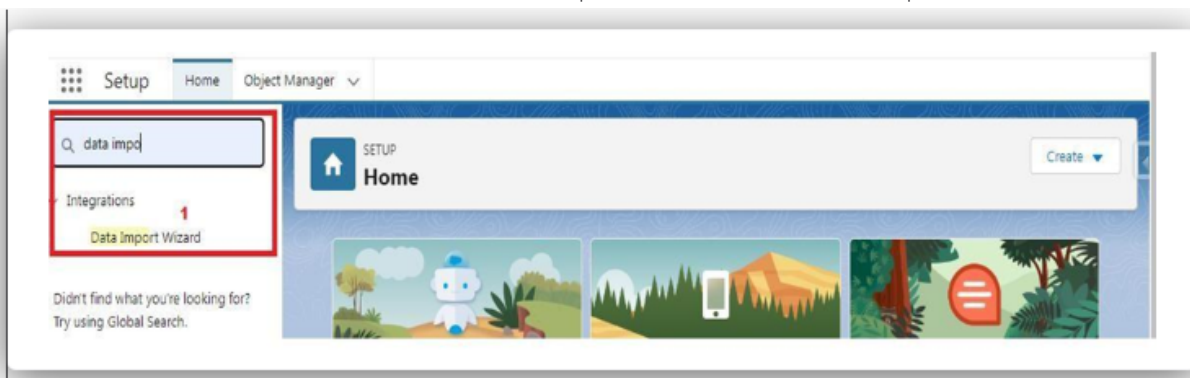
Activity 3: Delete a Record (Employee)

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.

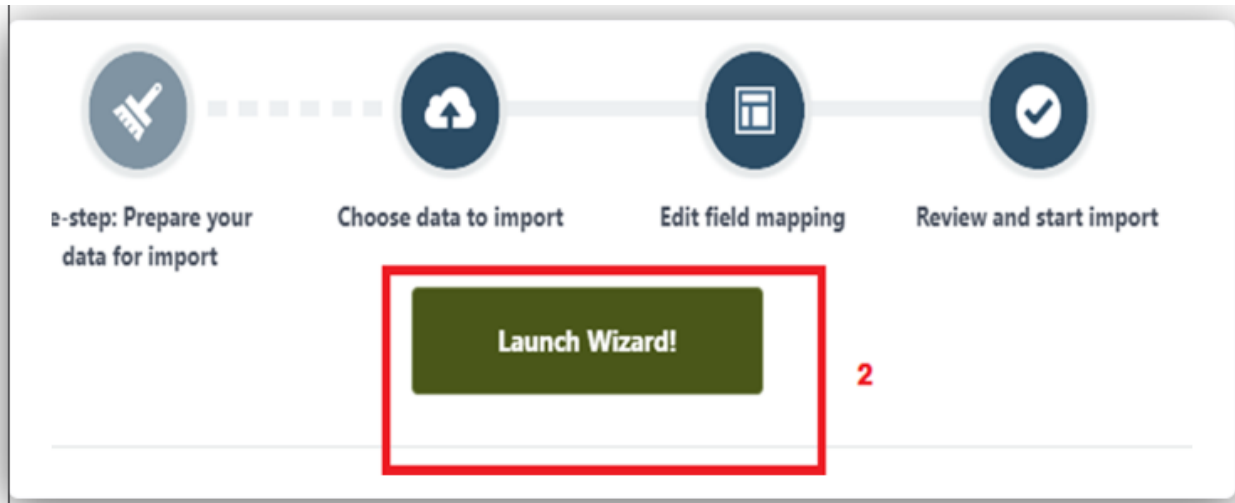
Import Data

Activity-1: Importing data using Data Wizard

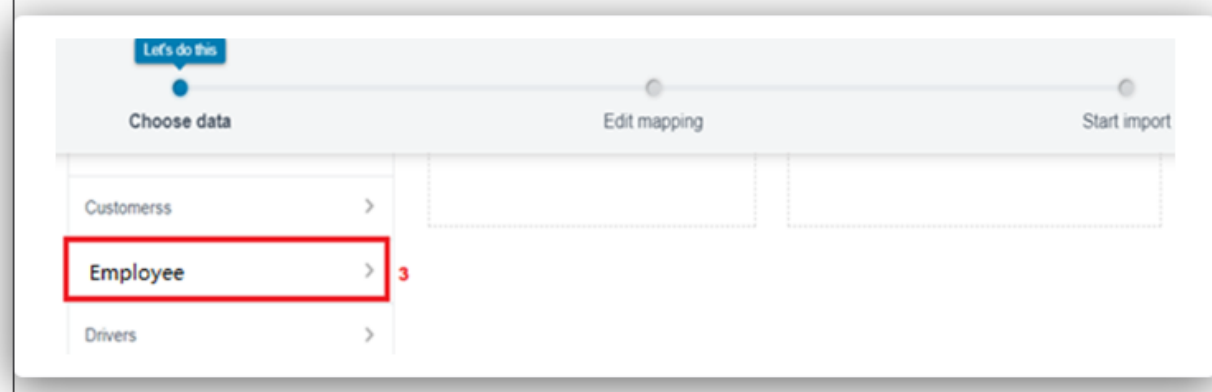
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



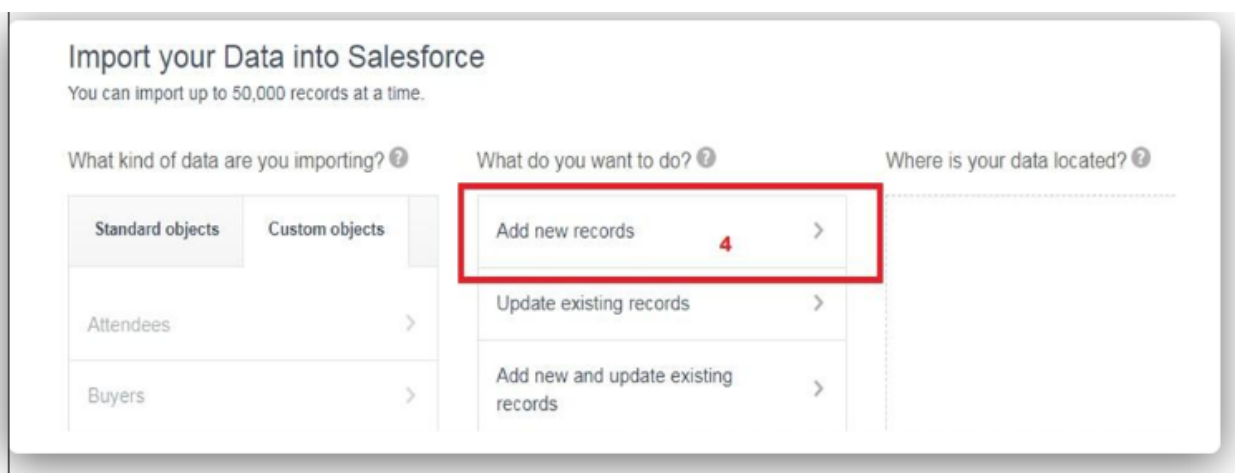
03 Click Launch Wizard!



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



05 Select Add new records.



06 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?

Standard objects Custom objects

Attendees >

Buyers >

Customers >

Departments ✓

Add new records ✓

Match by:
 --None--

Which User field in your file designates record owners?
 --None--

Trigger workflow rules and processes?
 ☐ Trigger workflow rules and processes for new and updated records

Drag CSV file here to upload

CSV

5

Cancel Previous **Next**

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

Setup Home Object Manager

Search Setup

Almost done

Choose data Edit mapping Start import

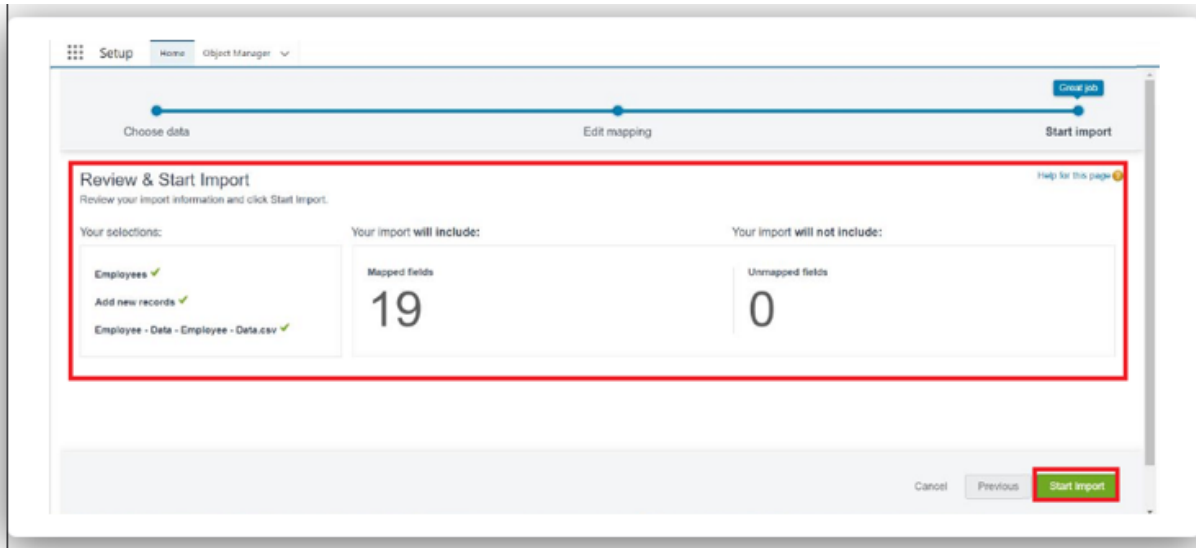
Edit Field Mapping: Employees

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	9	8	5
Change	Phone no	Phone no	7985434750	7985434751	7985434752

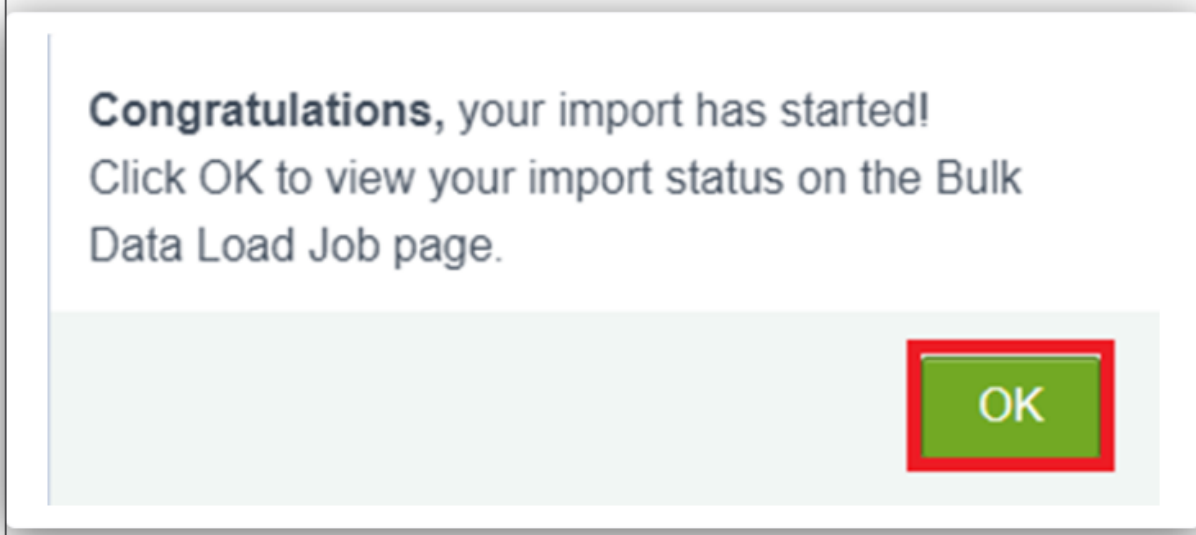
Cancel Previous **Next**

Note: no need to map "Reports to" field. The Data Import Wizard is designed to handle basic data import tasks and does not support mapping relationships between records

08 The next screen gives you a summary of your data import. Click Start Import.



09 Click OK on the popup.



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

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	Error Count
View Request	View Result	751540000J6YH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	105	60	0	14	0	0
								State Message		
								Completed		

11 Make sure 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.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

1. Contract Manager
2. Read Only
3. Marketing User
4. Solutions Manager
5. Standard User
6. System Administrator.

We cannot delete standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

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	HR

Save **Cancel**

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.

	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"/>

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.

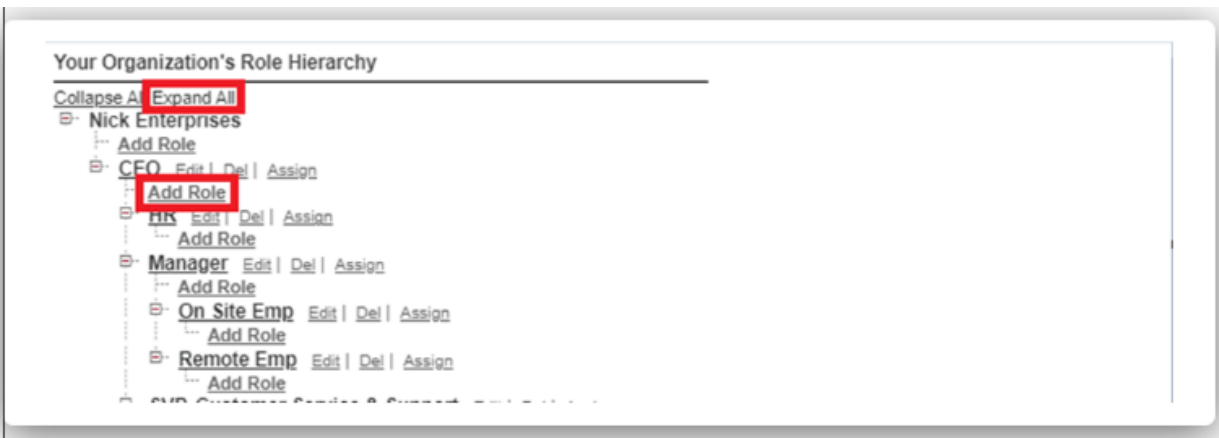
Role

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. 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 to whom this role (HR) reports. Then click on Save.

Role Edit
New Role

Role Edit

Label

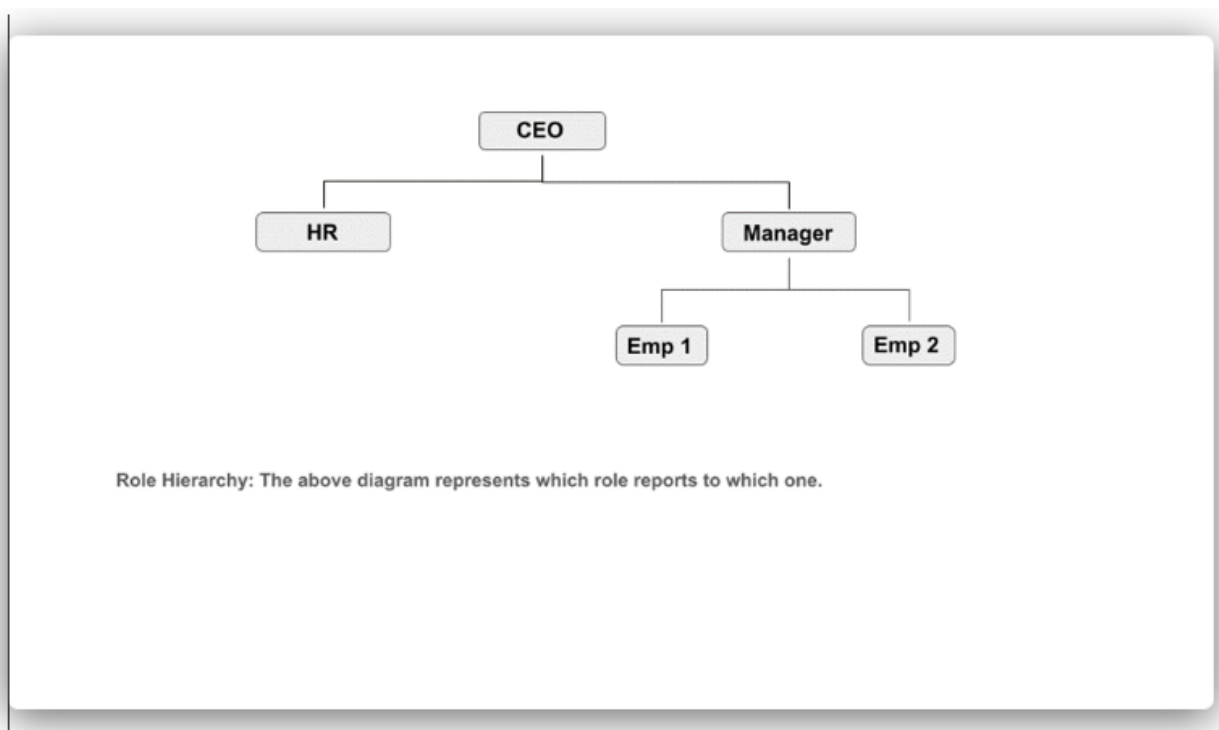
Role Name

This role reports to

Role Name as displayed on reports

Save Save & New Cancel

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

Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access. Each user account contains at least the following:

1. Username
2. Email Address
3. User's First Name (optional)
4. User's Last Name
5. Alias
6. Nickname
7. License
8. Profile
9. Role (optional)

Activity 1: Create User

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

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

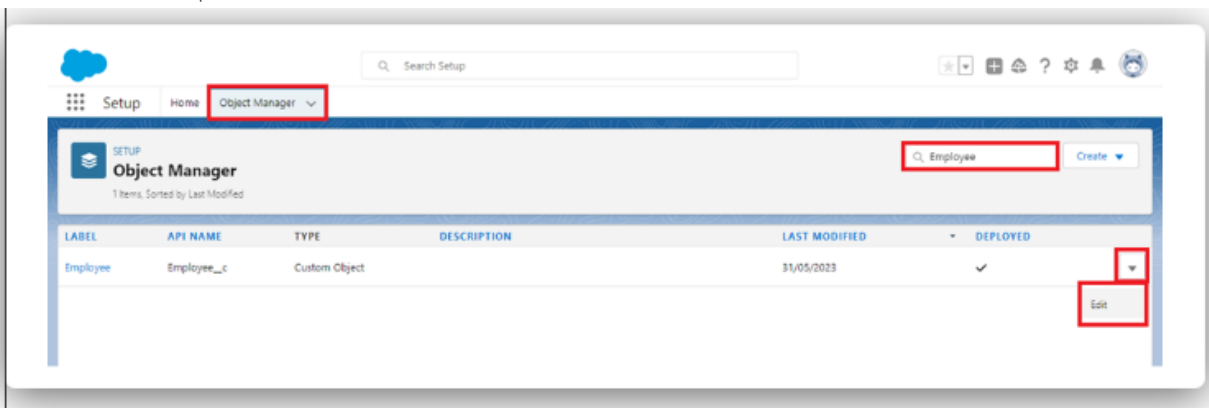
Create two more users as we created in activity 2.

Page layouts

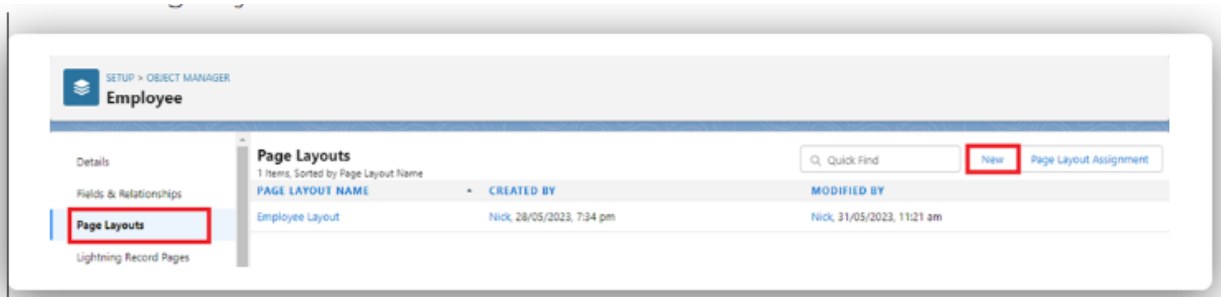
Activity 1 : creating a page layout for Employee object

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.

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.

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Fields

- Buttons
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists
- Report Charts

Section

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
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.

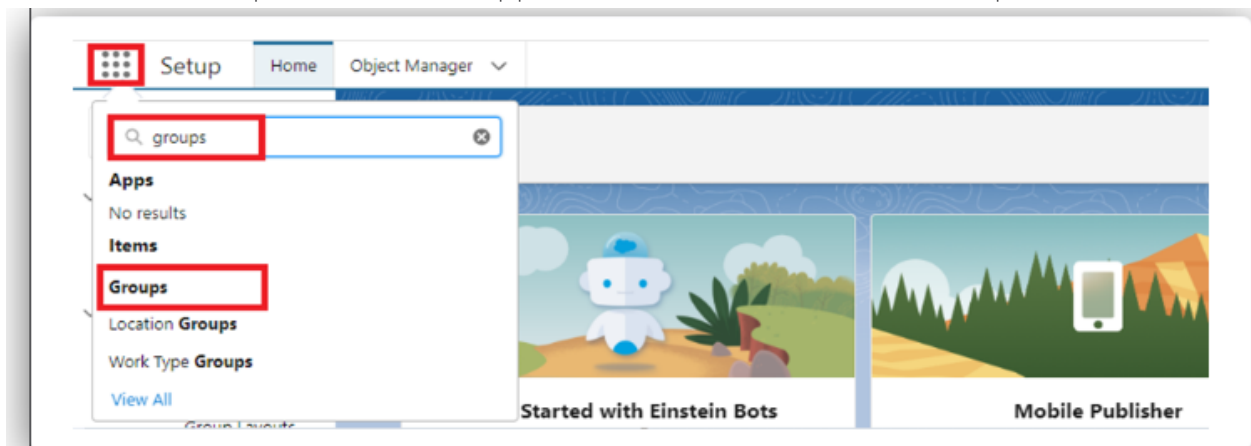
Chatter Group

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.

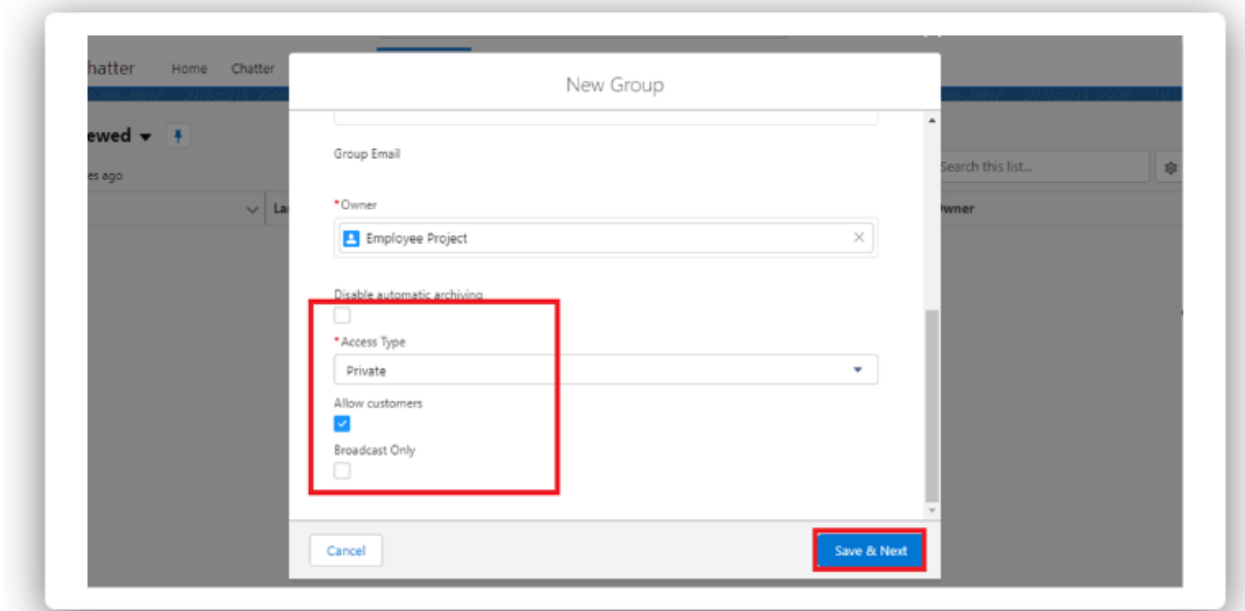
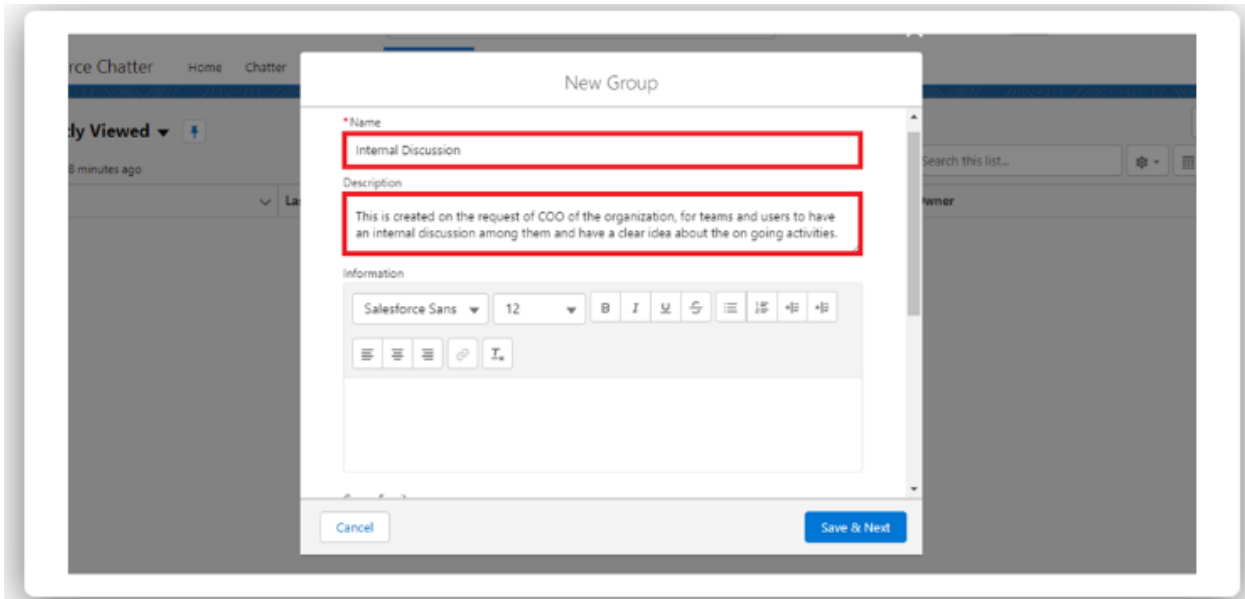


3 Click New

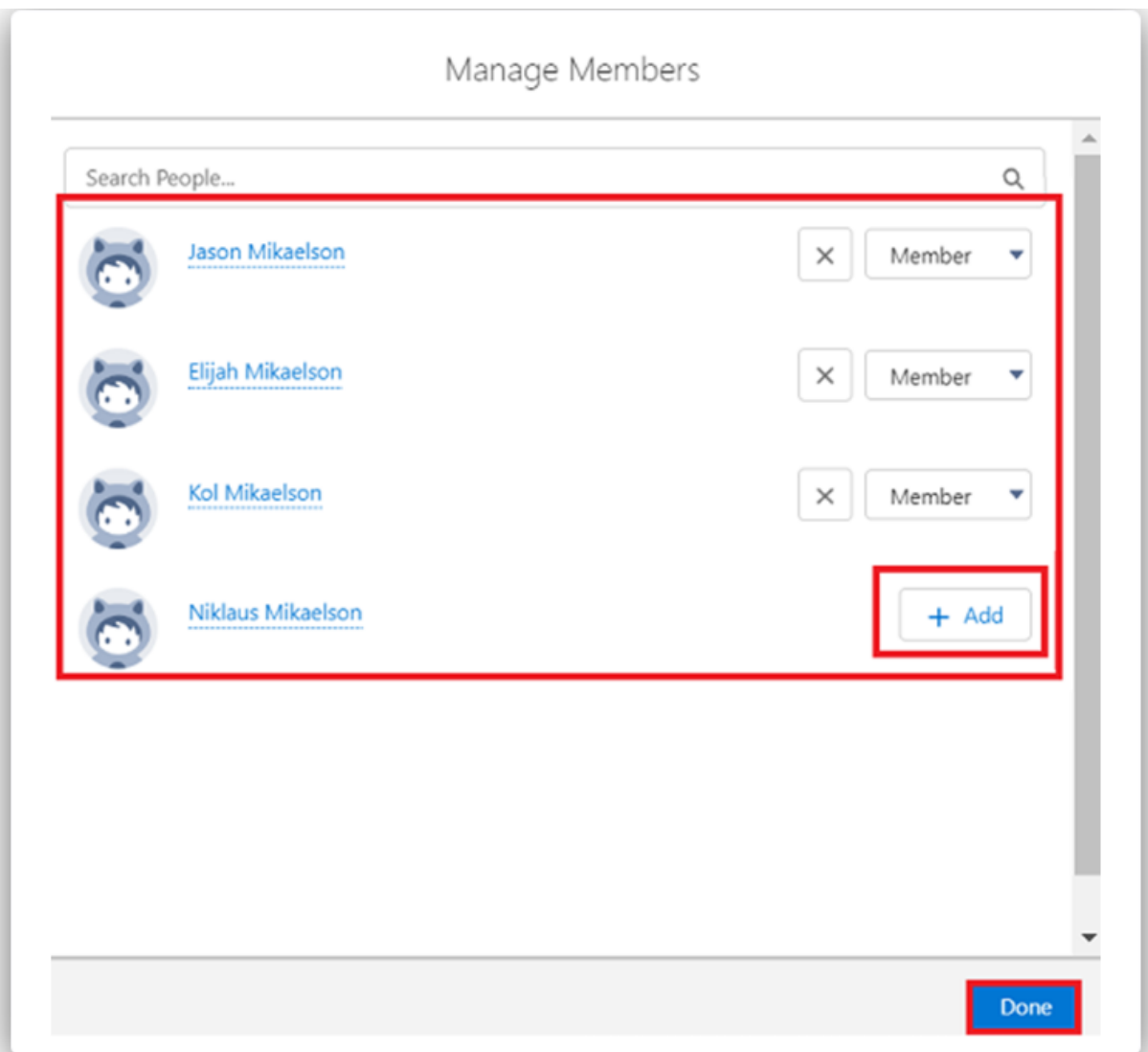
1. Fill in the new group information with these details:

Field	Value
1 Group Name	Internal Discussion
2 Description	Give a understanding Description on your own

3	Access Type	Private
4	Allow Customers	Checked



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

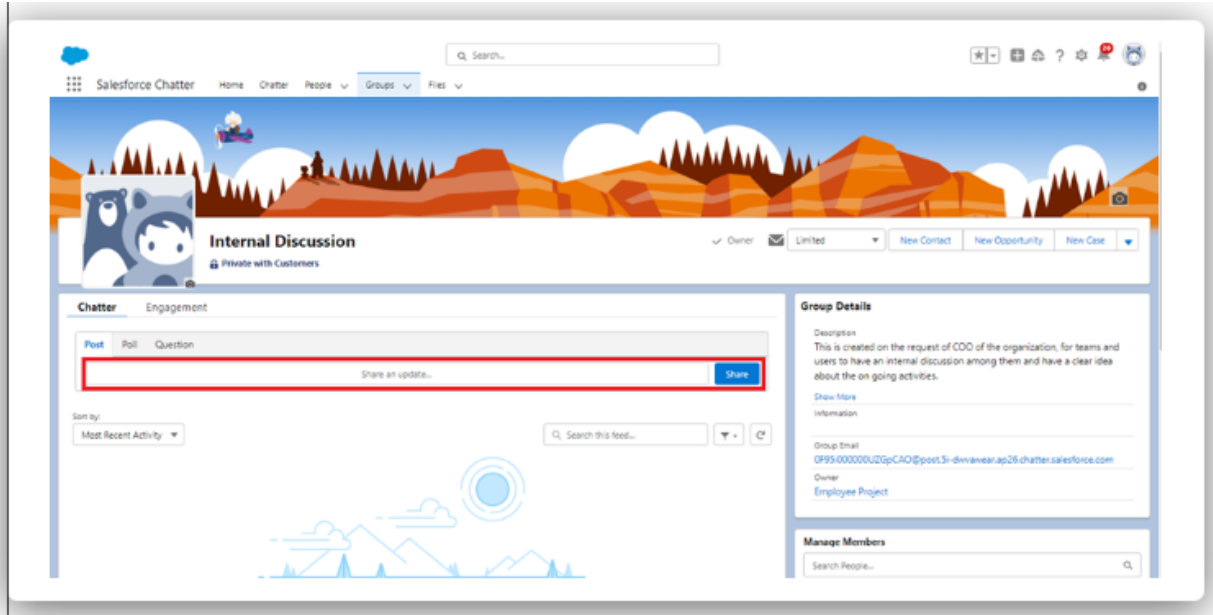


Click Done.

7. This is how your group interface looks like.
8. 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.
9. Click Share.

Note: You can like or comment on this post.

Note: there is a default chatter group in the org with all the active users in it, this activity is to show you how to create a chatter group and add users into it.



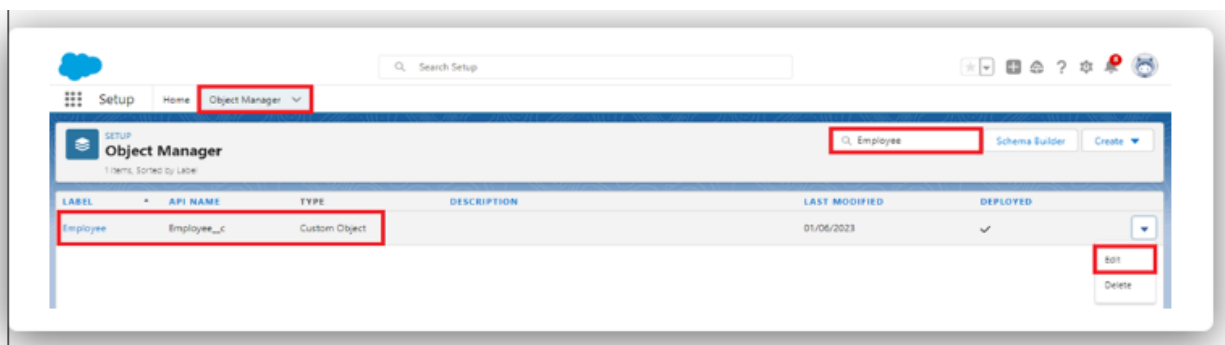
Record Types

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.

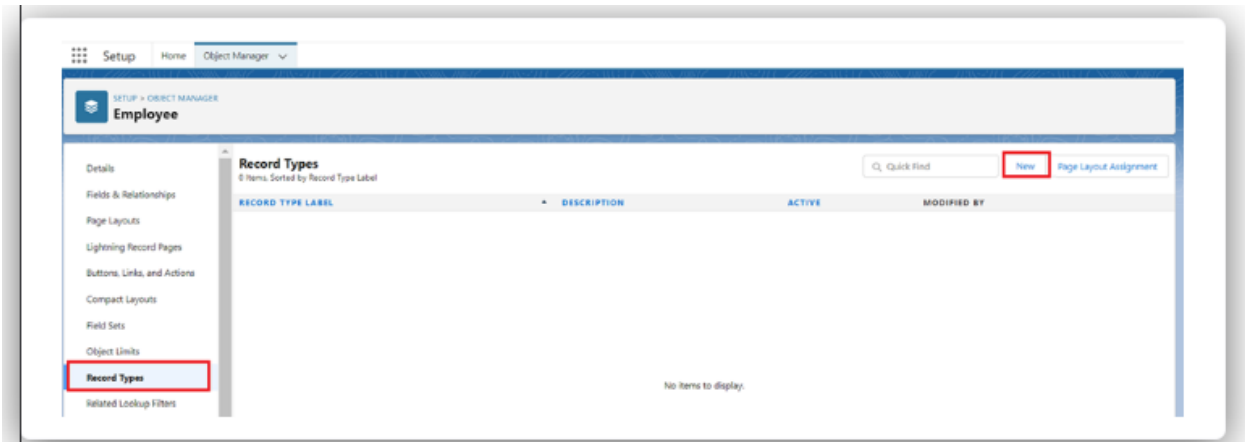
Activity 1: Creating On Site Employee Record Type

To create a Record Type:

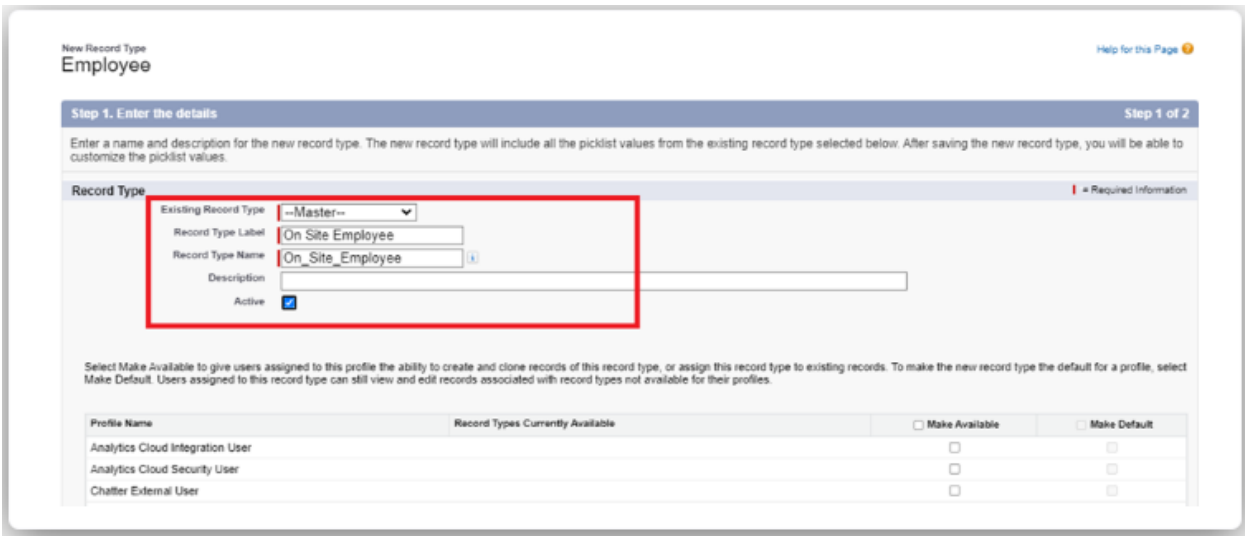
1. Go to Setup --> click on Object Manager --> Search for the object (Employee) --> from drop down click Edit.



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 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"/>
Voicemail.com Only User	<input type="checkbox"/>	<input type="checkbox"/>

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.

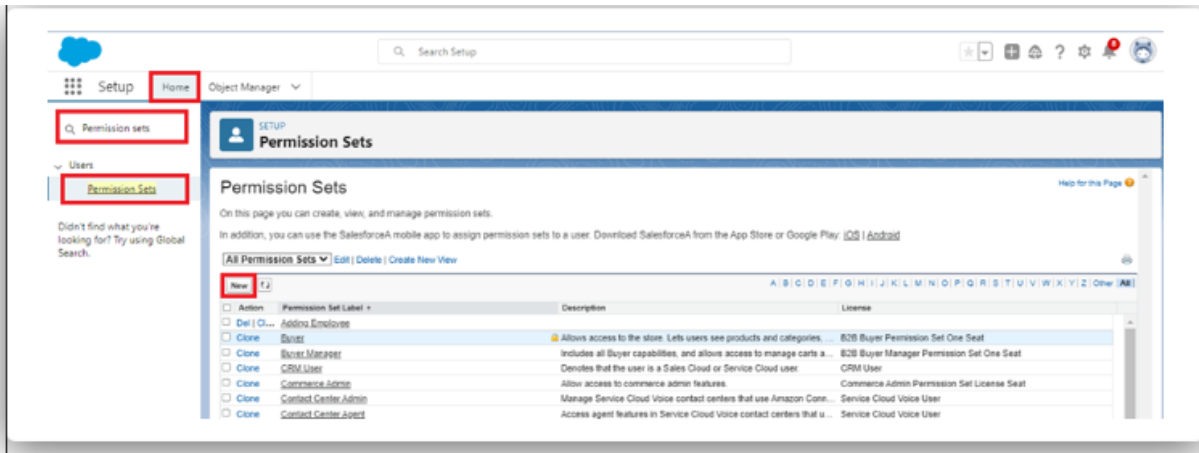
Permission sets

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.

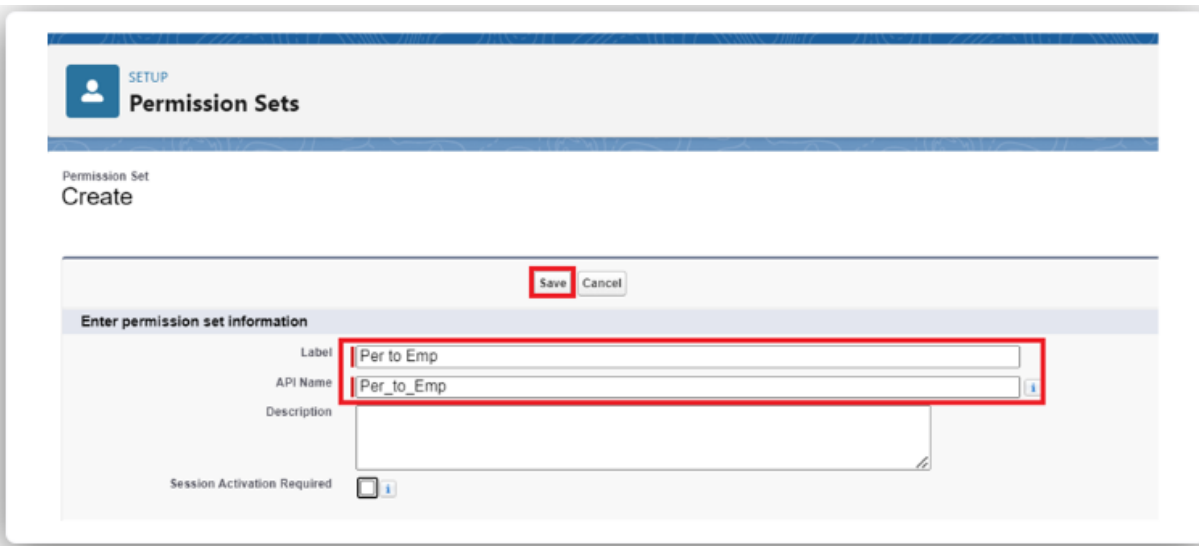
Activity 1: Creating a permission set

To Create a Permission Set:

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



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 check for read and create.

5. Click on Save.

6. After saving the permission click on the Manage assignment

Apps

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

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

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

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

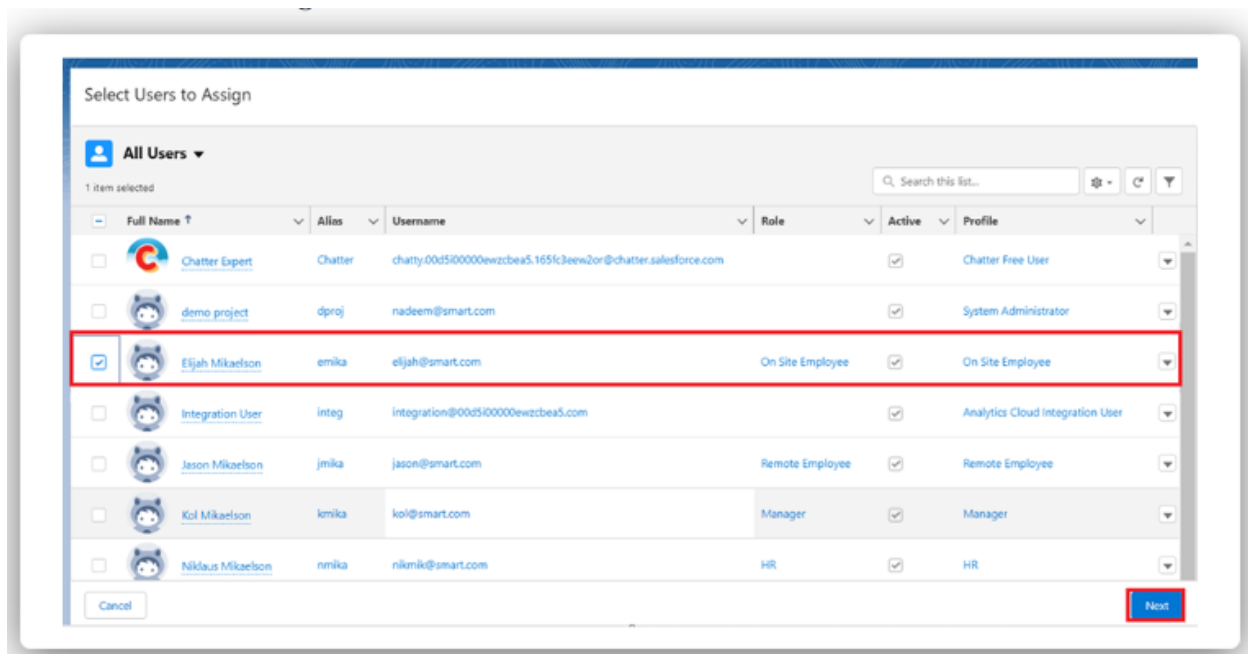
... > SETUP > PERMISSION SET "ADDING EMPLOYEE"

Adding Employee

Current Assignments

Add Assignment

8. Click on Add Assignment.



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.

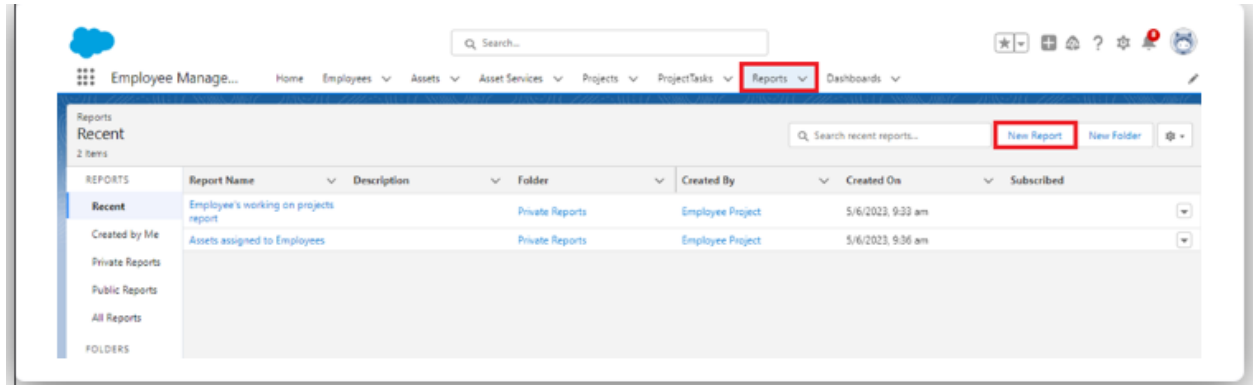
Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

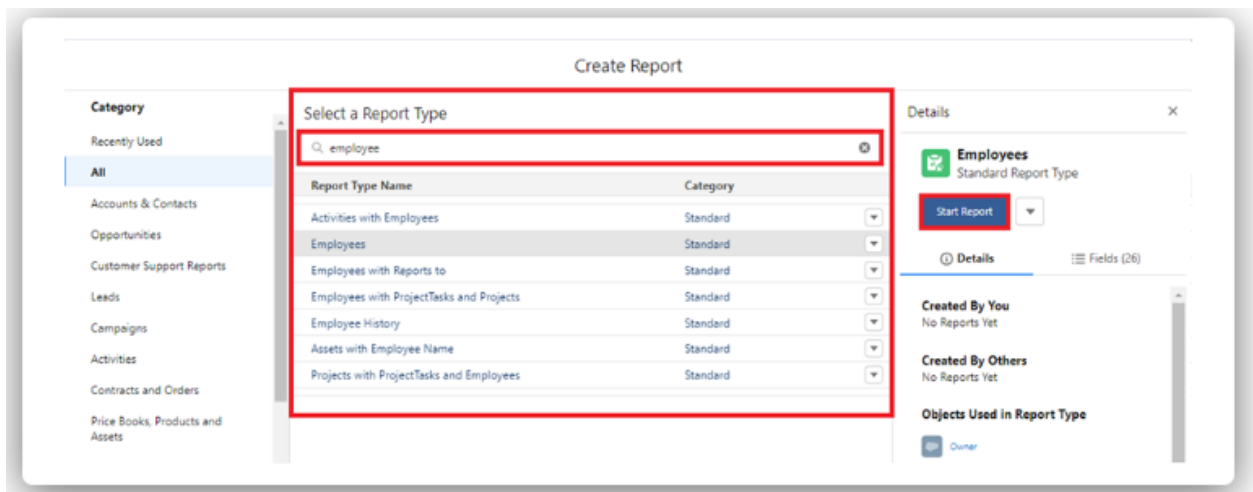
Activity 1: Create Report

To Create a Report:

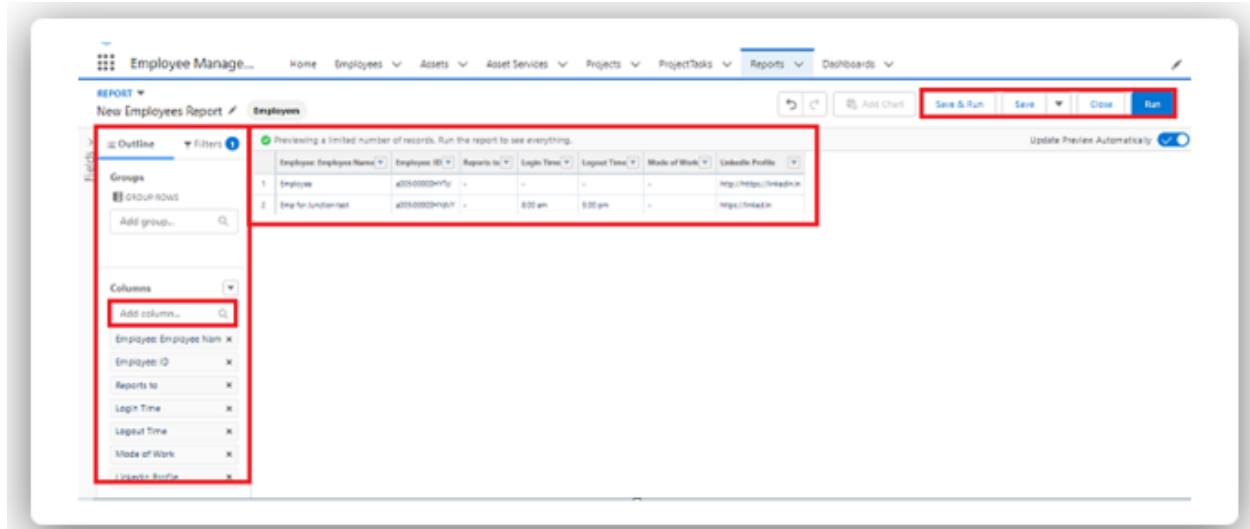
1. Go to the app --> click on the report
2. Click New Report.



3. Select report type from category or from report type panel or from search 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 and Projects".
2. Create a report with report type: "Employees with Assets".

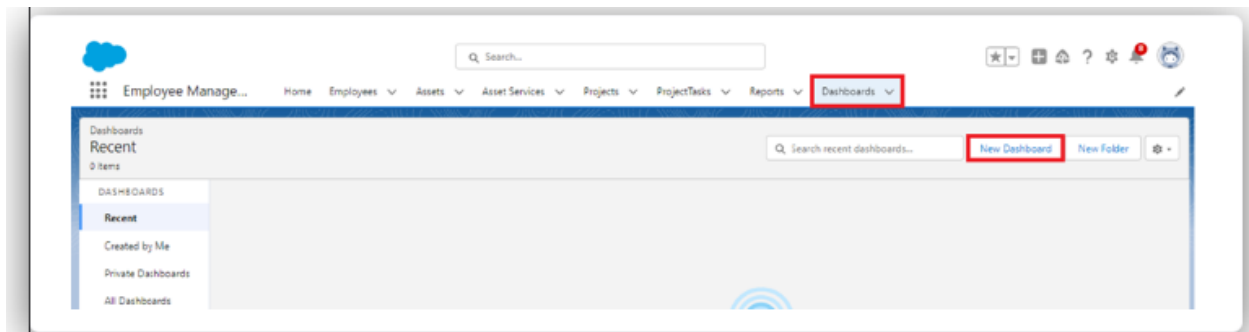
Dashboards

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 out 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

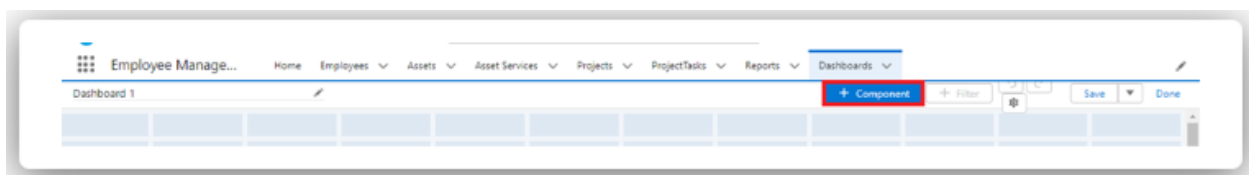
1. Go to the app --> click on the Dashboards tabs.



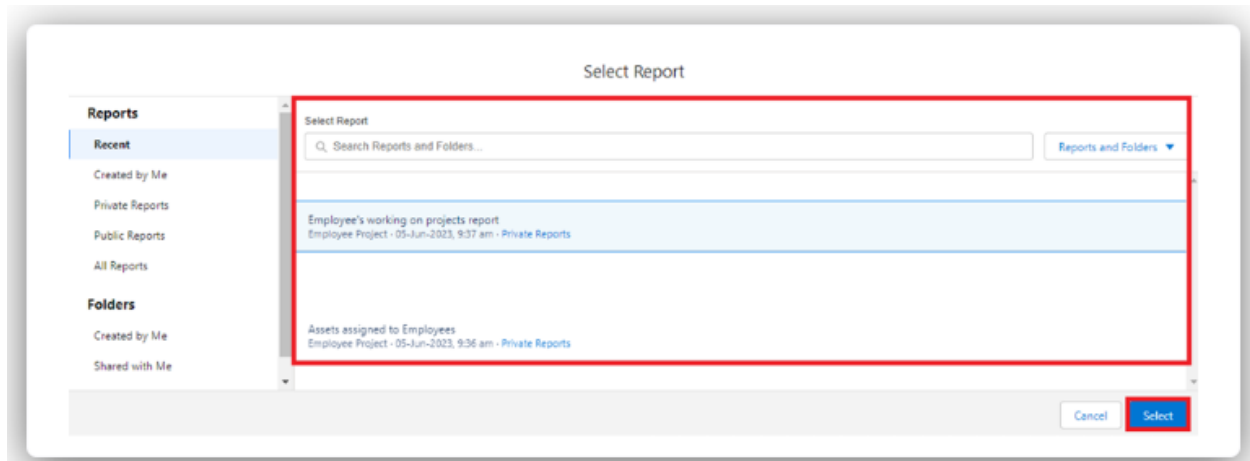
2. Give a Name and click on Create.

A screenshot of the 'New Dashboard' form. The form has a title 'New Dashboard' and three input fields: 'Name' (containing 'Dashboard 1'), 'Description', and 'Folder' (containing 'Private Dashboards'). A 'Select Folder' button is next to the Folder field. At the bottom right, there are 'Cancel' and 'Create' buttons, with the 'Create' button highlighted by a red box.

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.