

AP APSCHE APSSDC AU nasscom Short Term Internship 2025
Salesforce Developer Catalyst

PROJECT DOCUMENTATION

WORKFORCE ADMINISTRATION SOLUTION

By

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Project Overview:

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.

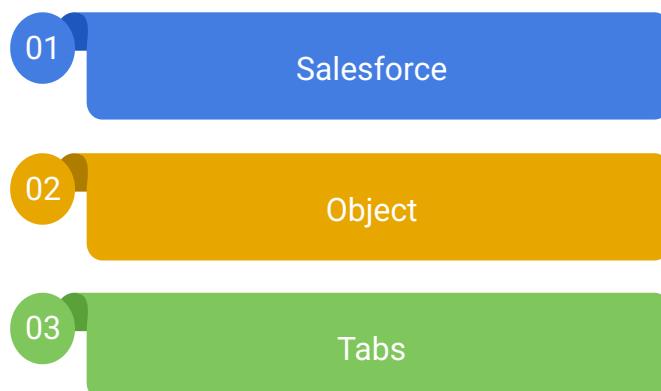
Objective:

The objective of the Workforce Administration Solution project is to build a centralized system on the Salesforce platform to

- Streamline employee management
- Automate project assignments
- Track performance and asset usage
- Reduce manual administrative work
- Improve productivity and data accessibility

This system will enhance organizational efficiency by providing a reliable, secure, and user-friendly interface for workforce tracking.

Project Milestones:



- 04 The Lightning App
- 05 Fields & Relationships
- 06 Setting OWD
- 07 User Adoption
- 08 Import Data
- 09 Profiles
- 10 Role
- 11 Users
- 12 Page layouts
- 13 Chatter Group
- 14 Record Types
- 15 Permission sets
- 16 Reports
- 17 Dashboards

Salesforce

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

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

<https://youtu.be/r9EX3IGde5k>

Use Case

Creating a Salesforce Developer Edition org allows developers to experiment, innovate, and build customized solutions within a controlled environment. With access to Salesforce's powerful development tools and features, developers can prototype, test, and refine their applications, empowering them to deliver robust and tailored solutions to meet unique business requirements. As a Salesforce Administrator for TheSmartBridge you must have a Salesforce developer edition org in order to do all the

required works which the CEO desires for TheSmartBridge.

Before creating our developer account, we must know what are the types of Editions Salesforce offers.

Types of Salesforce Editions:

1	Essentials	Designed for small businesses getting started with CRM to boost sales or service productivity. It includes a setup assistant and administration tools to customize your deployment as you grow.
2	Professional	Designed for businesses requiring full-featured CRM functionality. It includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.
3	Enterprise	Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems.
4	Unlimited	Maximizes your success and extends it across the entire enterprise through the Lightning Platform. It gives you new levels of platform flexibility for managing and sharing all your information on demand. Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.
		Provides access to the Lightning Platform and APIs. It lets

5	Developer	developers extend Salesforce, integrate with other applications, and develop new tools and applications. Developer Edition also provides access to many of the features available in Enterprise Edition
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Let's begin with creating our Salesforce Developer Account.

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 :

The screenshot shows the "Sign up for your Developer Edition" page. The main form fields are:

- First name
- Last name
- Job title
- Work email
- Company
- Country/Region (India)

Below the form, there is a checkbox for agreeing to the Main Services Agreement and a reCAPTCHA verification. The sidebar on the left contains the following text and icons:

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- Build apps fast with drag-and-drop tools
- Go further with Apex code
- Build AI agents with Agentforce
- Harmonize your data with Data Cloud
- Ground Agentforce with structured and unstructured data
- Integrate with anything using APIs

Agentforce

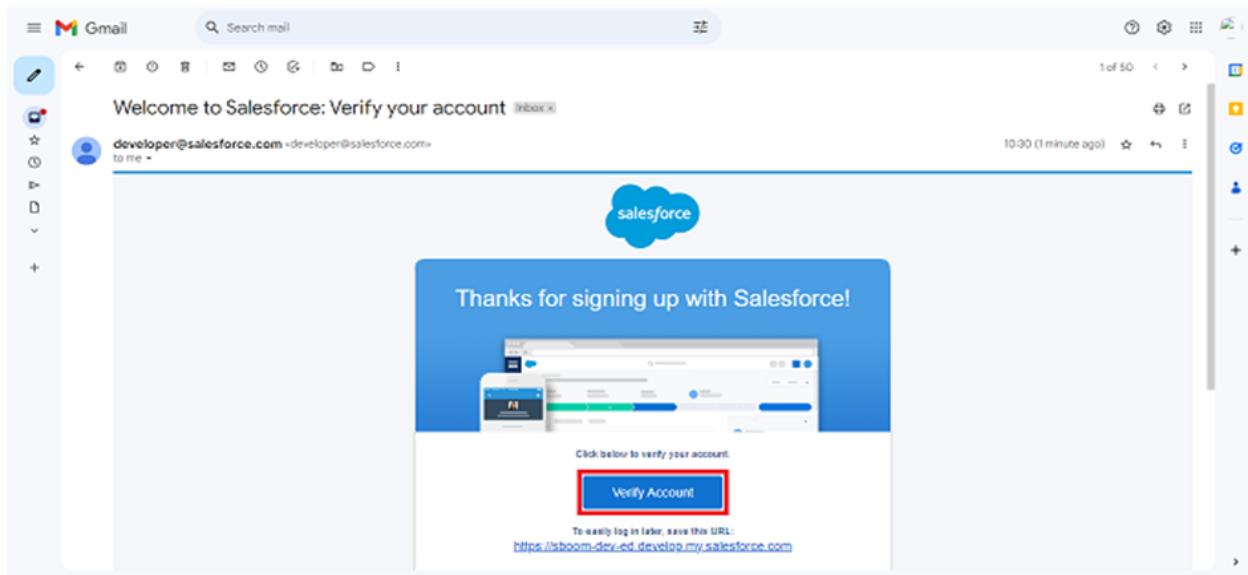
Customer Support
Sales Coach
Sales Development

1. First name & Last name
2. Job Title & Work email
3. Role : Developer
4. Company : College Name or Organization
5. Country : India
6. Agree to Main Services Agreement and Verify Captcha

Note: 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

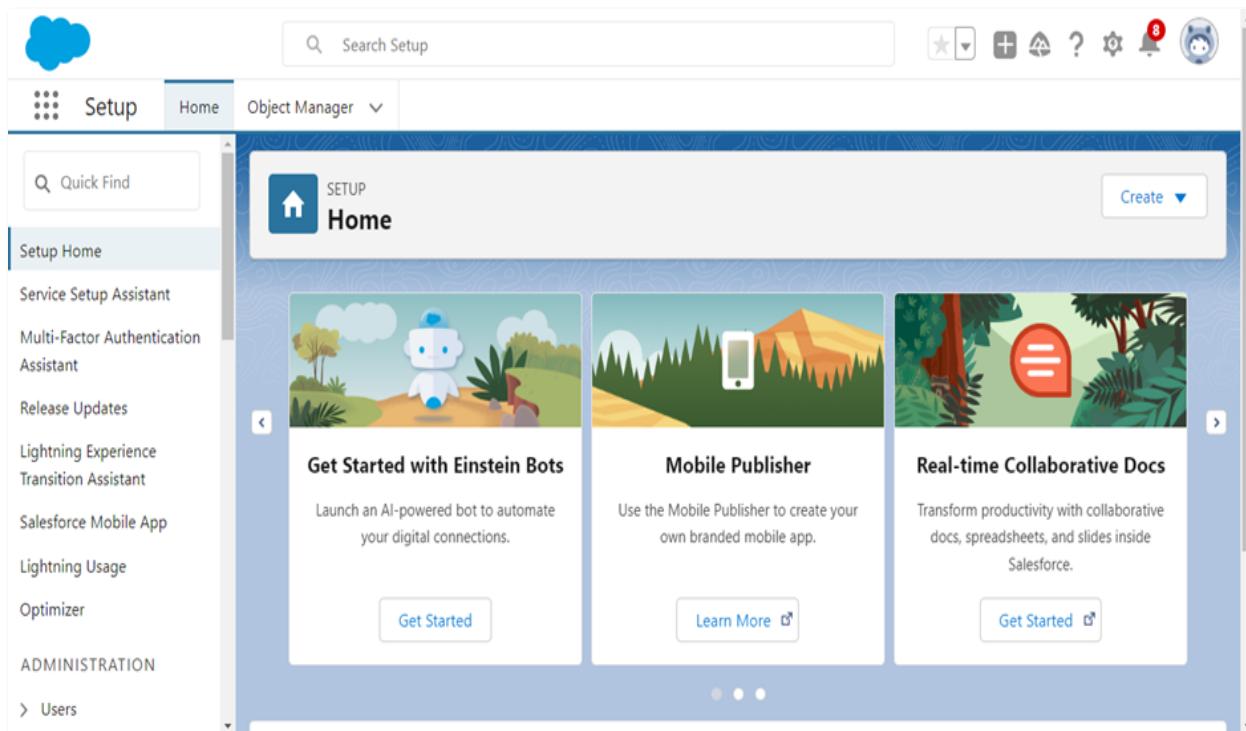
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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

A screenshot of a "Change Your Password" page. The title is "Change Your Password". It says "Enter a new password for lead@sb.oom. Make sure to include at least:" followed by three green bullet points: "8 characters", "1 letter", and "1 number". Below this are two input fields: "New Password" and "Confirm New Password", both containing dots and labeled "Good" and "Match" respectively. There is a "Security Question" section with a dropdown menu showing "In what city were you born?". Under "Answer", there is an input field containing "asdfghjkl". At the bottom is a large blue "Change Password" button, which is also highlighted with a red box.

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



Object

What Is an Object?

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

Salesforce objects are of two types:

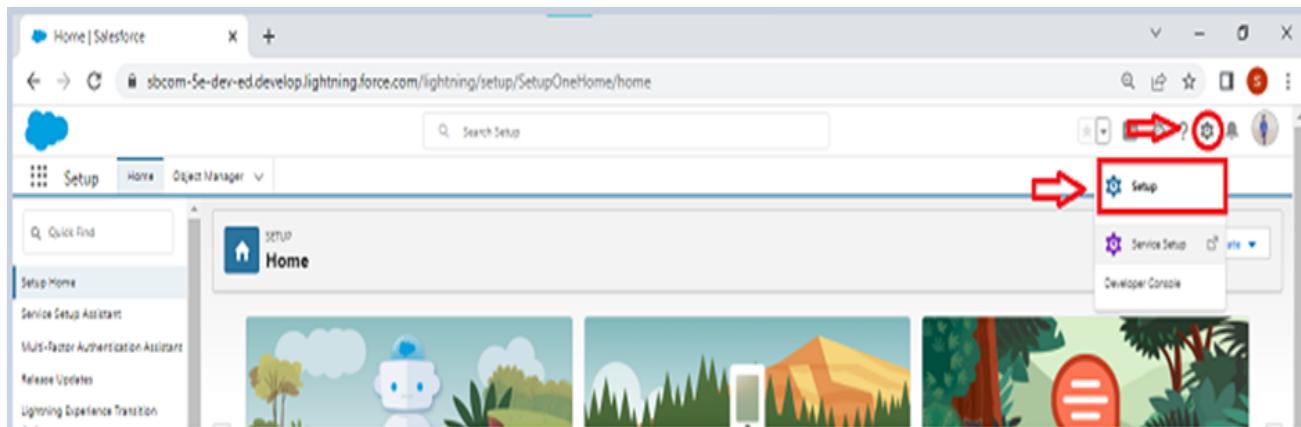
1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

Use Case

Creating an object in Salesforce organization is essential for efficient data management and process automation. By defining custom objects, businesses can structure and store data specific to their needs, enabling streamlined workflows, personalized reporting, and enhanced user experiences. Objects serve as the foundation for organizing and leveraging critical information within Salesforce. As an Admin for TheSmartBridge, It's your responsibility to store the data as per the organization needs.

To Navigate to Setup page:

Click on gear icon ? click setup.

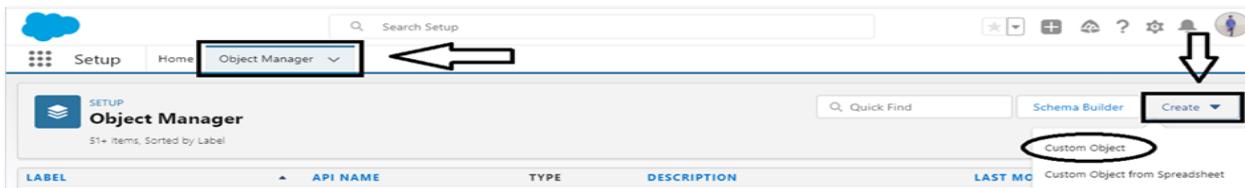


Activity 1: Create Employee Object

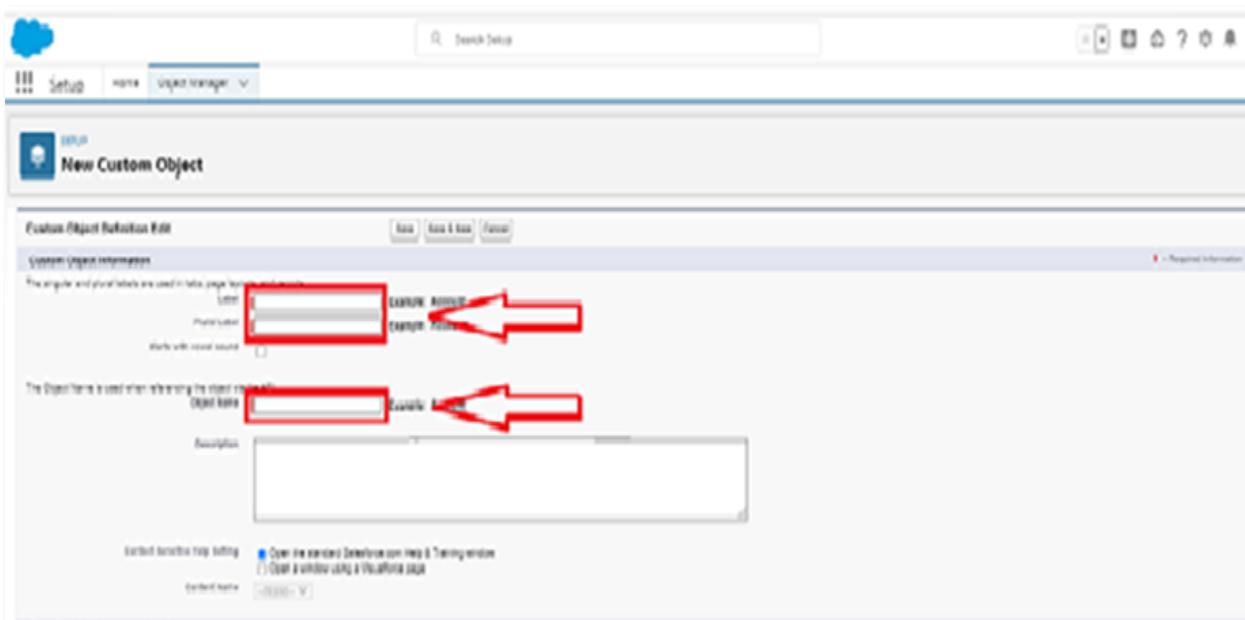
The purpose of creating an Employee custom object is to keep track the employee's activities and their individual and as well as team progress.

To create an object:

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



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



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

Enter Record Name Label and Format

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

Record Name	Employee Id	Example: Account Name
Data Type	Auto Number	
Display Format	EMS-{0000}	Example: A-{0000} What Is This?
Starting Number	1	

2. Click on Allow reports,

3. Allow search --> Save.

This screenshot shows the 'Object Creation Options' section of a custom object setup page. It includes fields for 'Optional Features', 'Object Classification', 'Deployment Status', 'Search Status', and 'Object Creation Options'. Annotations with red arrows and boxes highlight specific settings:

- A red circle highlights the checked checkbox for 'Allow Reports' under 'Optional Features'.
- A red arrow points to the checked checkbox for 'Allow Search' under 'Search Status'.
- A red box highlights the 'Save & New' button at the bottom of the page.
- A red arrow points upwards from the 'Save & New' button towards the 'Allow Search' checkbox.

Activity 2: Create Project Object

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

To create an object:

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

Custom Object.

- 1) Enter the label name--> Project
- 2) Plural label name--> Projects
- 3) Enter Record Name Label and Format
 1. Record Name : Project ID
 2. Data Type : Auto Number
 3. Display Format : Proj-{0000}
 4. Starting Number : 1
2. Click on Allow reports,
3. Allow search --> Save

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

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

Tabs

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

Types of Tabs:

1. Custom Tabs

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

2. Web Tabs

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

3. Visualforce Tabs

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

4. Lightning Component Tabs

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

5. Lightning Page Tabs

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

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Use Case

Creating Objects and storing TheSmartBridge organization's data is the very first step in the requirements they want. Now to access the stored data by an employee from the organization Admin needs to create Tabs. By designing a dedicated Tab, businesses can improve user experience, simplify navigation, and provide quick access to critical information, enhancing productivity and ensuring efficient utilization of Salesforce's capabilities.

Activity 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)

The screenshot shows the 'Custom Tabs' section of the Salesforce Setup. It includes a header with 'Custom Object Tabs' and 'New' (which is highlighted with a red box) and 'What Is This?'. Below this, it says 'No Custom Object Tabs have been defined'. There is also a 'Web Tabs' section with a similar header and message, stating 'No Web Tabs have been defined'.

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.

This screenshot shows the 'Create Custom Tab' dialog box. At the top, it says 'Choose the custom object for this new custom tab. Fill in other details.' Below that, there's a section to 'Select an existing custom object or create a new custom object now.' A dropdown menu for 'Object' is open, showing options like '--None--', 'Asset', 'Asset Service', and 'Employee'. The 'Employee' option is highlighted with a blue box. There's also a note about choosing a 'Home Page Custom Link' and a 'Splash Page Custom Link'. Below the dropdown, there's a field for 'Description' with a text area and a 'Next' button at the bottom right.

Activity 2: Creating a Custom Tab (Project)

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

as default --> Next (Add to Custom App) keep it as default --> Save.

Activity 3: Creating tabs for remaining objects

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

The Lightning App:

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.

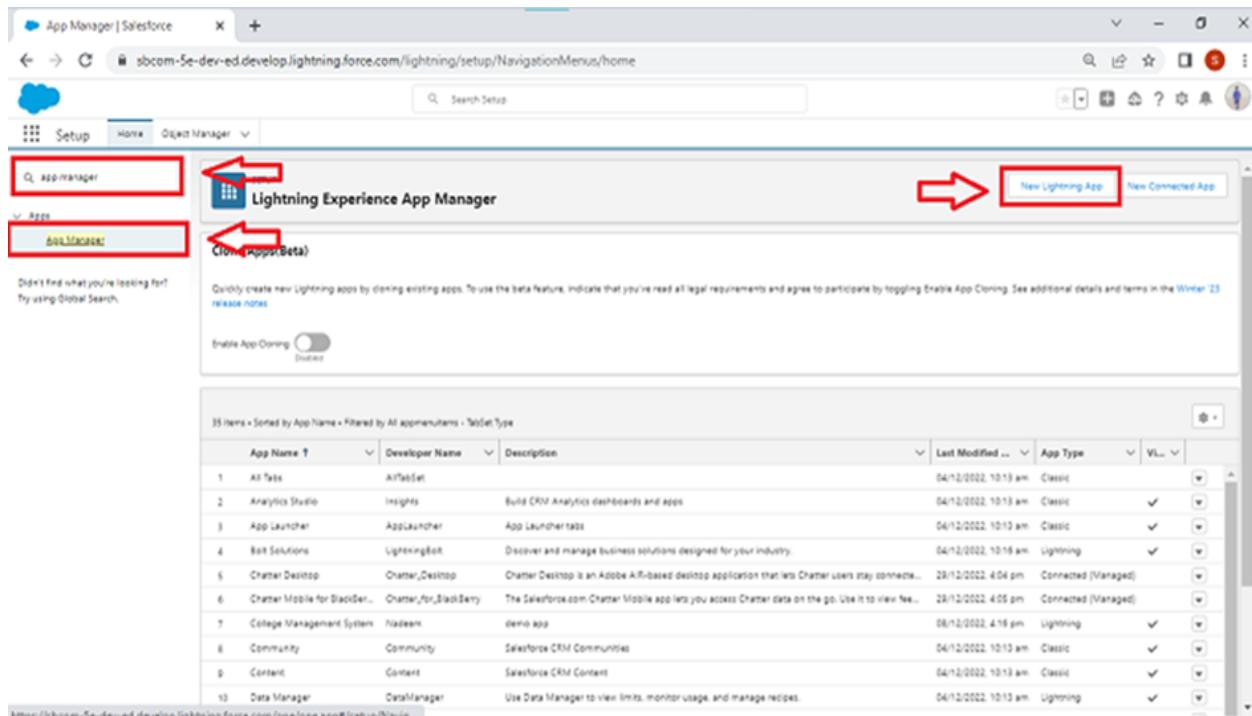
Use Case

Well done you have reached close to your organizational requirement by creating the objects to store the organization's data. Making a database for an organization is just not enough to reach out the requirements, the task is how the users at the organization can access the objects you have created for them. As an Admin for the TheSmartBridge organization it's your duty to make sure every user of the organization is able to access the data modeling structure.

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 :



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 →

Developer Name

Description

App Branding

Image →

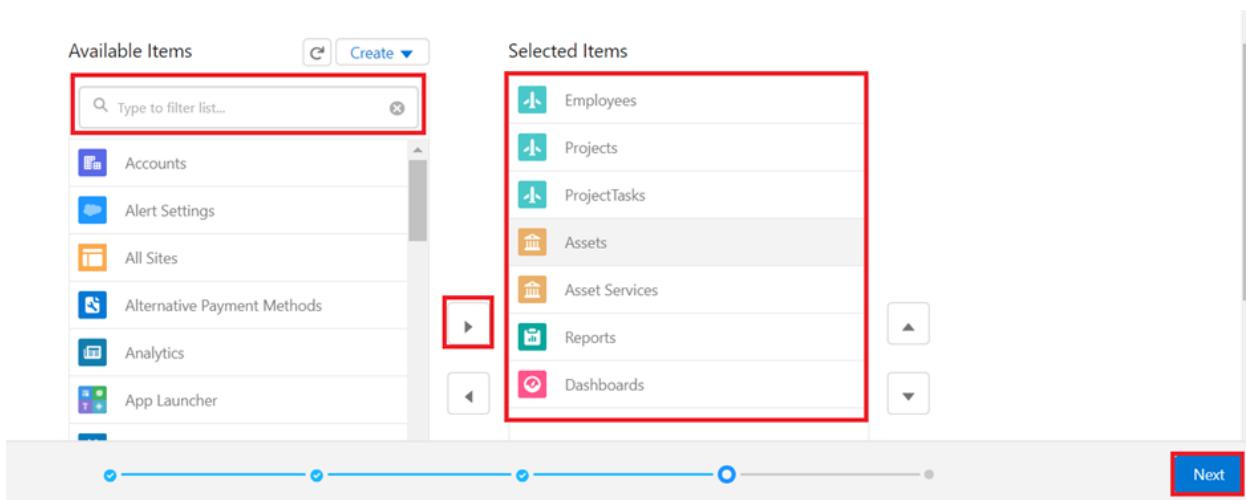
Primary Color Hex Value →

Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next →

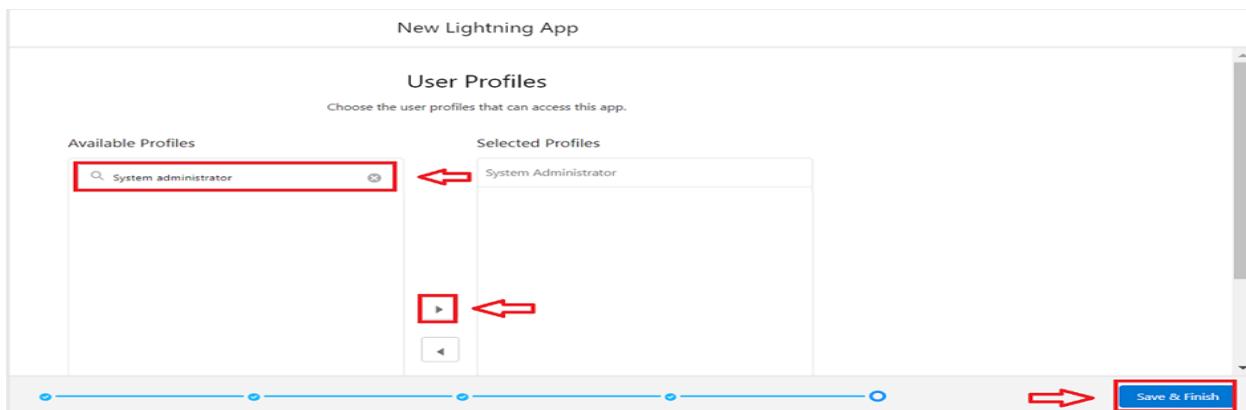
4. To Add Navigation Items:



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 that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Use Case

Now it's time for you to think out of the box for your organization. You have successfully created the database objects for the organization but now all eyes turn on you as you have to define what sort of information the objects store which you have created. As a life saver of your organization you come up with the idea of creating fields to store different types of data.

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.

The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager'. A red arrow points to the 'Object Manager' button. Below the navigation bar is a search bar containing 'Employee', also highlighted with a red box. The main area is titled 'Object Manager' and shows a table with one item: 'Employee' (Label), 'Employee_c' (API Name), 'Custom Object' (Type), and '20/06/2023' (Last Modified). The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

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

The screenshot shows the 'Fields & Relationships' page for the Employee object. On the left, there is a sidebar with options: 'Details', 'Fields & Relationships' (which is selected and highlighted with a red box), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', and 'Compact Layouts'. The main area is titled 'Fields & Relationships' and shows a table with four items: 'Created By', 'Employee ID', 'Last Modified By', and 'Owner'. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A red arrow points to the 'New' button at the top right of the table. The table also includes a 'Quick Find' search bar and buttons for 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

3. Select Data type as "Text".

<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input checked="" type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.

4. Click on Next

Employee
New Custom Field

Help for this Page ?

Step 2. Enter the details Step 2 of 4

Previous **Next** Cancel

Field Label	<input type="text" value="Employee Name"/>	
Length	<input type="text" value="18"/>	
Field Name	<input type="text" value="Employee_Name"/>	
Description	<input type="text"/>	

5. Fill the above as following:

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

Activity 2 : Creating Date of Birth Field in Employee Object

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

<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input checked="" type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass

3. Click on Next.

4. Fill the above as following:

a. Field Label: Date of Birth.

b. Field Name : gets auto generated.

c. Click on Next --> Next --> Save and new.

Activity 3 : Creating Formula Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1

2. Select Data type as “Formula” and click Next.

3. Give Field Label and Field Name as “Age” and select formula return type as “Number” and click next.

Step 2. Choose output type

Step 2 of 5

Previous **Next** **Cancel**

Field Label <input type="text" value="Age"/>	Field Name <input type="text" value="Age"/>
Auto add to custom report type <input type="checkbox"/> Add this field to existing custom report types that contain this entity ?	
Formula Return Type	
<input type="radio"/> None Selected Select one of the data types below.	
<input type="radio"/> Checkbox Calculate a boolean value. Example: <code>TODAY() > CloseDate</code>	
<input type="radio"/> Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: <code>Gross Margin = Amount - Cost__c</code>	
<input type="radio"/> Date Calculate a date, for example, by adding or subtracting days to other dates. Example: <code>Reminder Date = CloseDate - 7</code>	
<input type="radio"/> Date/Time Calculate a date/time, for example, by adding a number of hours or days to another datetime. Example: <code>Next = NOW() + 1</code>	
<input checked="" type="radio"/> Number Calculate a numeric value. Example: <code>Fahrenheit = 1.8 * Celsius__c + 32</code>	

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

Step 3. Enter formula

Step 3 of 5

Previous **Next** Cancel

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

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

Simple Formula **Advanced Formula**

Insert Field Insert Operator ▾

Age (Number) = **YEAR(TODAY()) - YEAR(Date_of_Birth_c)**

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

Description

Functions

... All Function Categories ▾

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

Insert Selected Function

Activity 4 : Creating Picklist Field in Employee Object

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

Step 2. Enter the details Step 2 of 4

Previous **Next** Cancel

Field Label	Gender
Values	<input type="radio"/> Use global picklist value set <input checked="" type="radio"/> Enter values, with each value separated by a new line Male Female
	<input type="checkbox"/> Display values alphabetically, not in the order entered <input type="checkbox"/> Use first value as default value <input checked="" type="checkbox"/> Restrict picklist to the values defined in the value set
Field Name	Gender
Description	
Help Text	

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

Activity 5 : Creating Self-Relationship Field in Employee Object

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

Employee New Relationship Help for this Page

Step 2. Choose the related object Step 2

Previous **Next** Cancel

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.

SI 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
	7 Mode of Work	Picklist: Values <input type="text"/>
1	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	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
			Completed On Going Not Yet Started

--	--	--

		Field Name	Data type
3 Project Task		1 Project Task	MDR with project object
		2 Finishes in	Formula : (Project_Task__r.Start_Date__c - Project_Task__r.End_Date__c) Formula return type: Number Numbers
		3 Working Hours	Master Detail relationship with Employee object
		4 Employee Name	
Note: here in Finishes in field, Start Date and End Date belong to Employee Object.			

		Field Name	Data type
4	Asset Service		

		<p>1 Asset Id</p> <p>2 Type</p> <p>3 Technician</p> <p>4 Subject</p> <p>5 Description</p>	<p>Lookup relationship with Asset object</p> <p>Picklist: Values</p> <p>Technical Issue</p> <p>Non Technical Issue</p> <p>Text</p> <p>Text Area</p> <p>Text Long</p>
--	--	---	--

5	Asset	Field Name	Data type
		1 Asset Type	<p>Picklist: Values</p> <p>Laptop</p> <p>Charger</p> <p>Mouse</p> <p>Monitor</p>

			CPU	
		2 Model Name		
		3 Employee Name	Text Lookup relationship with Employee Object	
		4 Date Of Issue	Formula (Joining date) Formula Return type: date	
Note: here in the Date of Issue field, the Joining date field belongs to the Employee Object.				

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

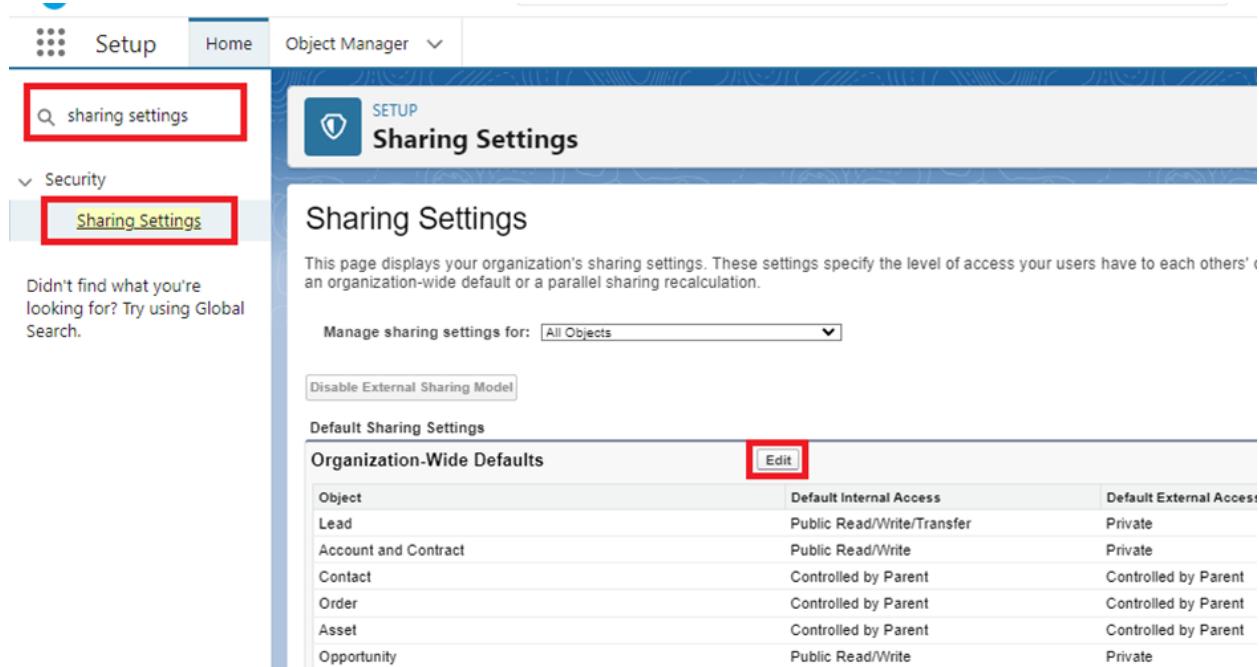
Use Case

Data is the most precious thing of any organization and keeping it safe is the first most priority of any Admin in the organization. As an Admin, to ensure data privacy and compliance with regulations, you need to restrict access to sensitive customer information using 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.



3. Search for the Employee object.
4. Under default internal access and default external access change the options to "Private" and under grant access using hierarchies select the check box.
5. Click on save.

Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset Service	Public Read/Write	Private	<input checked="" type="checkbox"/>
Employee	Private	Private	<input checked="" type="checkbox"/>
Project	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Other Settings			
Standard Report Visibility <input checked="" type="checkbox"/> <small>i</small>		Manual User Record Sharing <input type="checkbox"/> <small>i</small>	Manager Groups <input type="checkbox"/> <small>i</small>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

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

Activity 2:

Set OWD as Private for Project and Asset Service objects.

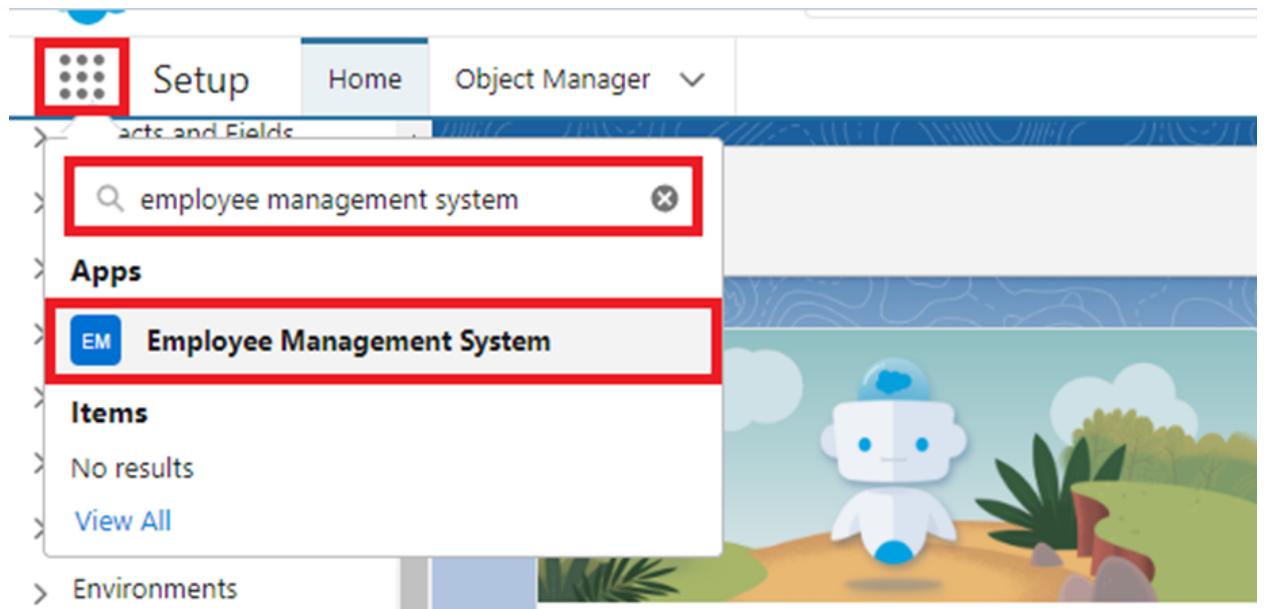
User Adoption

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.

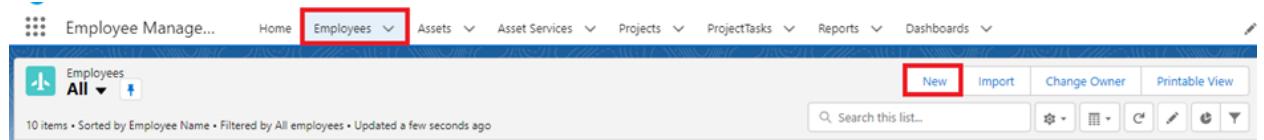
Activity 1: Create a Record (Employee)

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 and save the file in CSV.

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

Data Import lets you upload data from external sources and combine it with data you collect via Analytics. You can then use Analytics to organize and analyze all of your data in ways that better reflect your business.

The Data Import Wizard is a Tool makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects.

In order to complete this milestone, you need to create CSV files and give them data given in the picture below. After that from these CSV files we will import data for the Employee object.

Use Case

Congrats you have successfully made an app with all the default settings for the organization. Now here comes the real admin work, to import the old data of TheSmartBridge organization which was in CSV format into the salesforce org without failing any of the record. Note in real time you might also facing some additional task such as data cleaning, elimination of duplicate values or records, etc.

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 deleted 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.

Use Case

Great work Admin, you have done so good till now. TheSmartBridge CEO wants you to differentiate the users based on their functionalities, position and based on this those users need to have the minimum access to the database object in the organization. Now it's time to use your Admin skills to focus on the users, their functionality and position in the organization in order to achieve the CEO requirements.

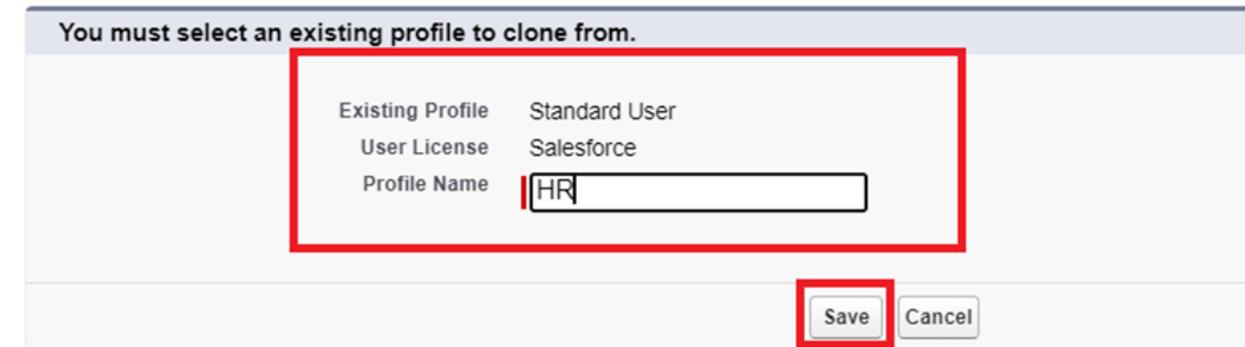
Activity 1: HR Profile

To create a new profile:

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

Clone Profile

Enter the name of the new profile.



You must select an existing profile to clone from.

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

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

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

Session Settings

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

4. Scroll down and Click on Save.

Activity 2: Manager Profile

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

Activity 3: Create Employee Profile

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

Role

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

Use Case

You have successfully fulfilled the 1st requirement i.e., differentiating the users based on the functionality. Now comes the 2nd task of differentiating the users based on their

position, using your excellent admin skills and expanding the custom roles for the organization and assigning it to the users.

Activity 1: Creating HR Role

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

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Users', the 'Roles' link is highlighted with a red box. At the bottom right of the main content area, there is a red box around the 'Set Up Roles' button. The main content area displays an 'Understanding Roles' section with a sample role hierarchy diagram titled 'Territory-based Sample'.

```

graph TD
    CEO[CEO - President] --> CFO[CFO - VP, Sales]
    CFO --> WesternSalesDir[Western Sales Director]
    CFO --> EasternSalesDir[Eastern Sales Director]
    CFO --> InternationalSalesDir[International Sales Director]
    WesternSalesDir --> CARep[CA Sales Rep]
    WesternSalesDir --> ORRep[OR Sales Rep]
    EasternSalesDir --> NYRep[NY Sales Rep]
    EasternSalesDir --> MARep[MA Sales Rep]
    InternationalSalesDir --> AsianRep[Asian Sales Rep]
    InternationalSalesDir --> EuropeanRep[European Sales Rep]
  
```

The diagram illustrates a role hierarchy with the following details:

- Executive Staff**: CEO - President, CFO - VP, Sales
- Western Sales Director**: Western Sales Manager, CA Sales Rep, OR Sales Rep
- Eastern Sales Director**: Eastern Sales Manager, NY Sales Rep, MA Sales Rep
- International Sales Director**: International Sales Manager, Asian Sales Rep, European Sales Rep
- CEOs**: View & edit data, roll up forecasts, & generate reports for entire org. Can't access data of other Executive Staff.
- Directors**: View & edit data, generate reports for entire org. Can't access data of others above or at same level.
- Sales Reps**: View & edit data, generate reports for entire org. Can't access data of others above or at same level.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top, there is a 'Collapse All' and 'Expand All' link, with 'Expand All' highlighted with a red box. The main tree view shows the following structure:

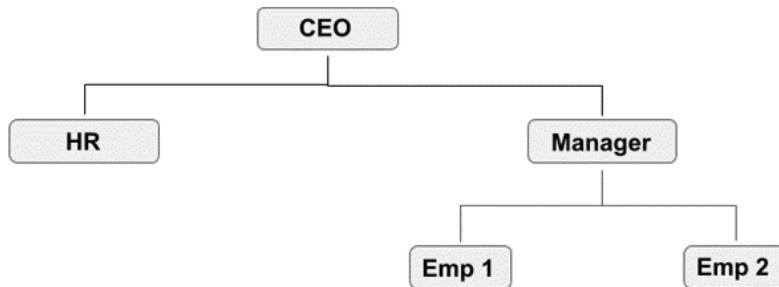
- Nick Enterprises**
 - Add Role**
 - CFO** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - HR** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - Manager** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - On Site Emp** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - Remote Emp** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**

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

Role Edit
New Role

Role Edit	
Label	<input type="text"/>
Role Name	<input type="text"/> 
This role reports to	<input type="text"/> 
Role Name as displayed on reports	<input type="text"/>
Save Save & New Cancel	

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



Role Hierarchy: The above diagram represents which role reports to which one.

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)

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 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

The screenshot shows the 'New User' creation page in Salesforce. The 'General Information' section is highlighted with a red box. Inside this box are the following fields: First Name (Niklaus), Last Name (Mikaelson), Alias (nmika), Email (empty), Username (nlarkin@MNwhite.com), and Nickname (Niklaus). To the right of these fields is a 'Role' dropdown set to 'HR', which is also highlighted with a red box. Below the role are other optional checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (set to 'None'), Data.com Monthly Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling (checked), and Debug Mode.

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.

Use Case

Hurray!! you have completed the data model structure for your organization but while looking at the detailed and edit pages it seems to be so clumsy, so decide to organize the page in a pleasant way for the sake of good and pleasant appearance and assembling all different kinds of information in different sections.

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.

The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager'. A red box highlights the 'Object Manager' button. Below the navigation bar, the title 'Object Manager' is displayed with a blue icon. A search bar contains the text 'Employee', which is also highlighted with a red box. To the right of the search bar is a 'Create' button. The main area shows a table with one item: 'Employee' (Label), 'Employee__c' (API Name), 'Custom Object' (Type), and '31/05/2023' (Last Modified). The 'DEPLOYED' column has a checkmark. In the bottom right corner of the table row, there is an 'Edit' button, which is also highlighted with a red box.

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

Employee		Page Layout Assignment	
Page Layout Name	Created By	Modified By	
Employee Layout	Nick, 28/05/2023, 7:34 pm	Nick, 31/05/2023, 11:21 am	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 standard sections.

Existing Page Layout	<input type="text" value="Employee Layout"/>
Page Layout Name	<input type="text" value="On Site Employee Layout"/>
Save Cancel	

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

The screenshot shows the Salesforce Page Layout Editor interface. At the top, there are buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a sidebar titled 'Fields' lists various options like Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The main area contains a table with columns for Field Name and Type. Several rows are highlighted in yellow, including '+Section' and 'Blank Space'. Below the table, there are three sections: 'Information' (Header visible on edit only), 'Personal Information', and 'Allowances'. The 'Information' section contains fields such as Employee ID (GEN-2004-001234), Employee Name (Sample Text), Gender (Sample Text), Experience (Sample Text), Email (sarah.sample@company.com), Joining date (21/06/2023), and LinkedIn Profile (www.salesforce.com). The 'Personal Information' section contains Date of Birth (21/06/2023) and Address (Sample Text). The 'Allowances' section contains checkboxes for Cab Allowance (checked) and Food Allowances (checked). To the right of these sections, there are corresponding values: Owner (Sample Text), Reports to (Sample Text), Qualification (Sample Text), Phone no (1-415-555-1212), Mode of Work (Sample Text), Login Time (Sample Text), and Logout Time (Sample Text). At the bottom, there is a summary section with Cab Allowance Amount (₹123.45) and 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.

Use Case

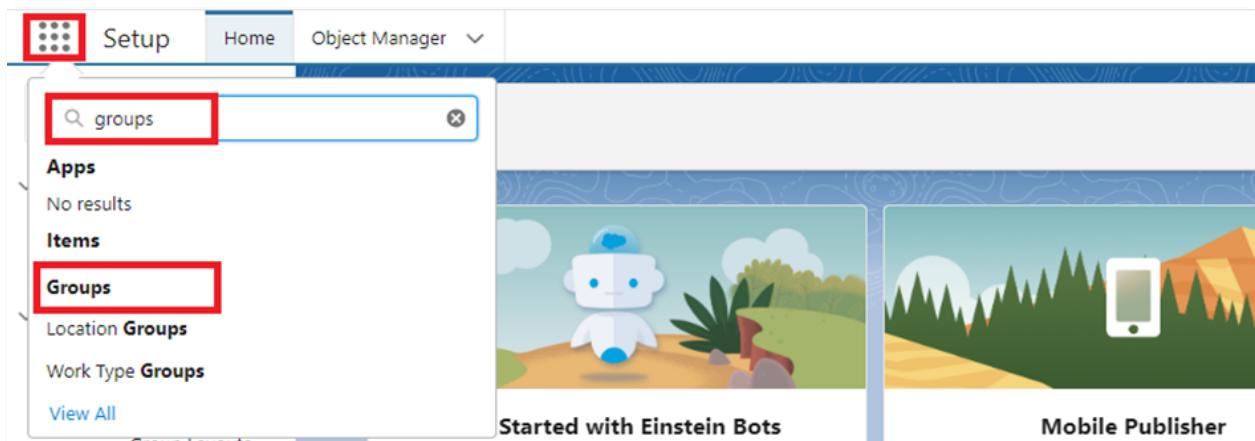
Congratulations Admin you have made the job done for the organization, Amar The

Founder of the organization and Jai Prakash The COO are very impressed with your work. But still there are some updates which your COO wants in your organization. So he comes to you with the idea that all the employees should have a common group for work discussion inside the salesforce. You know how to get this done with your admin skills.

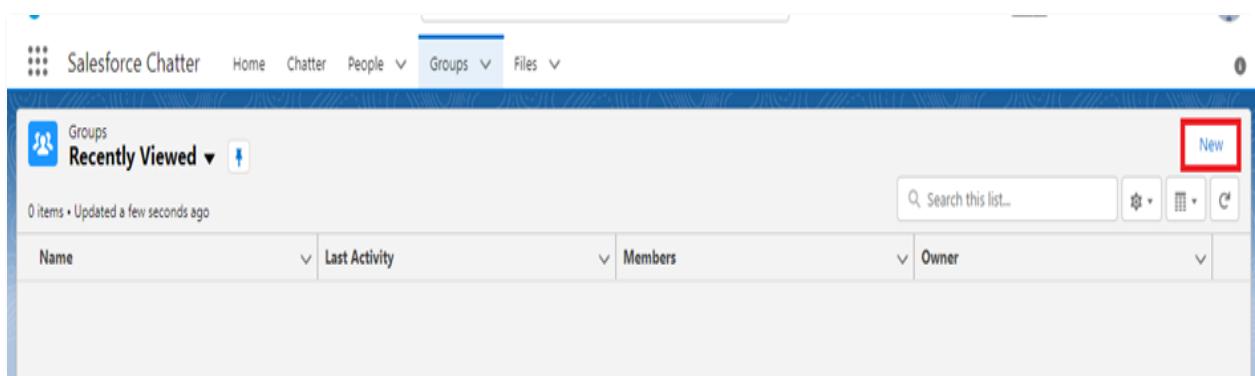
Activity 1 : Creating a chatter group for your organization.

To Create a chatter group:

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

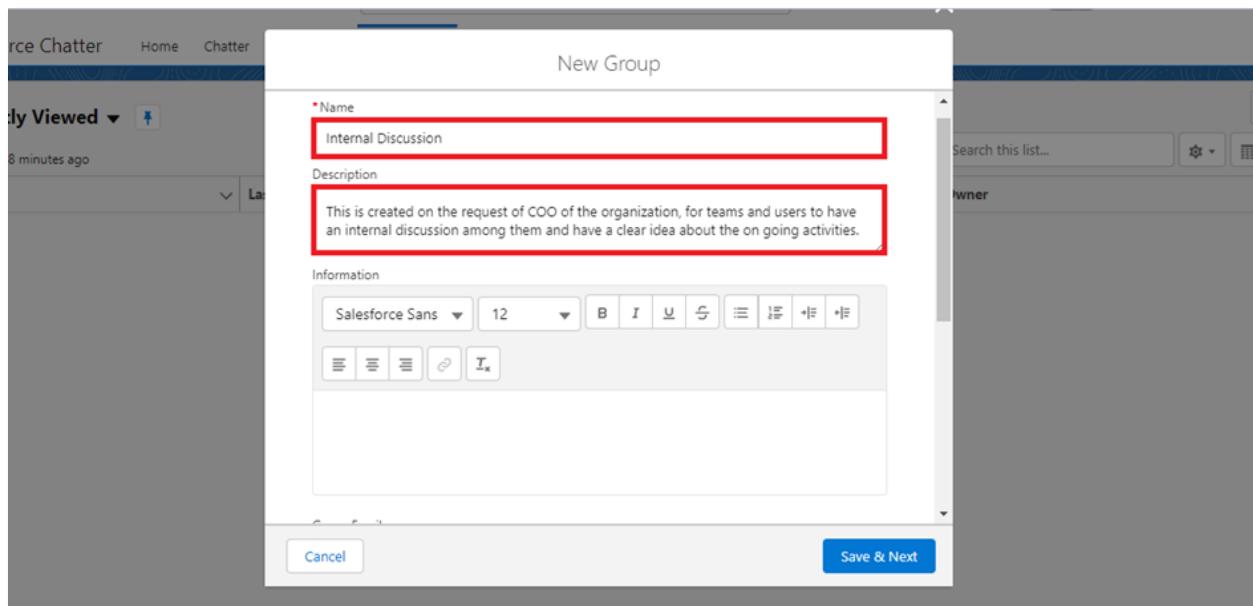


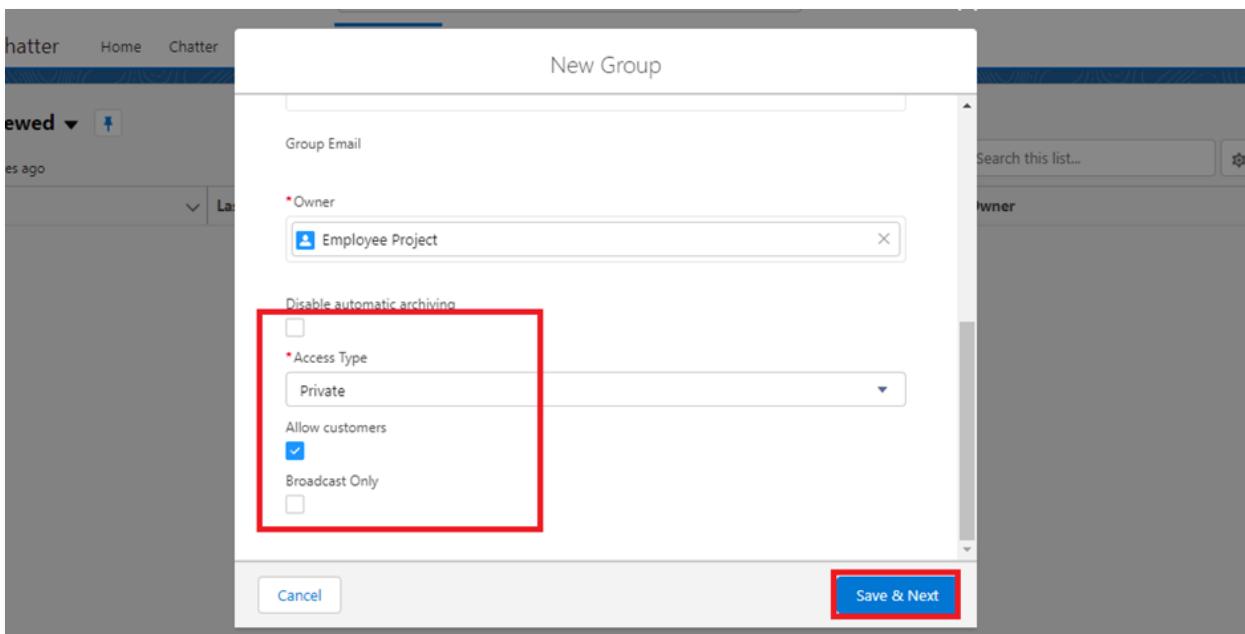
3. Click New.



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

Field	Value
1 Group 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.

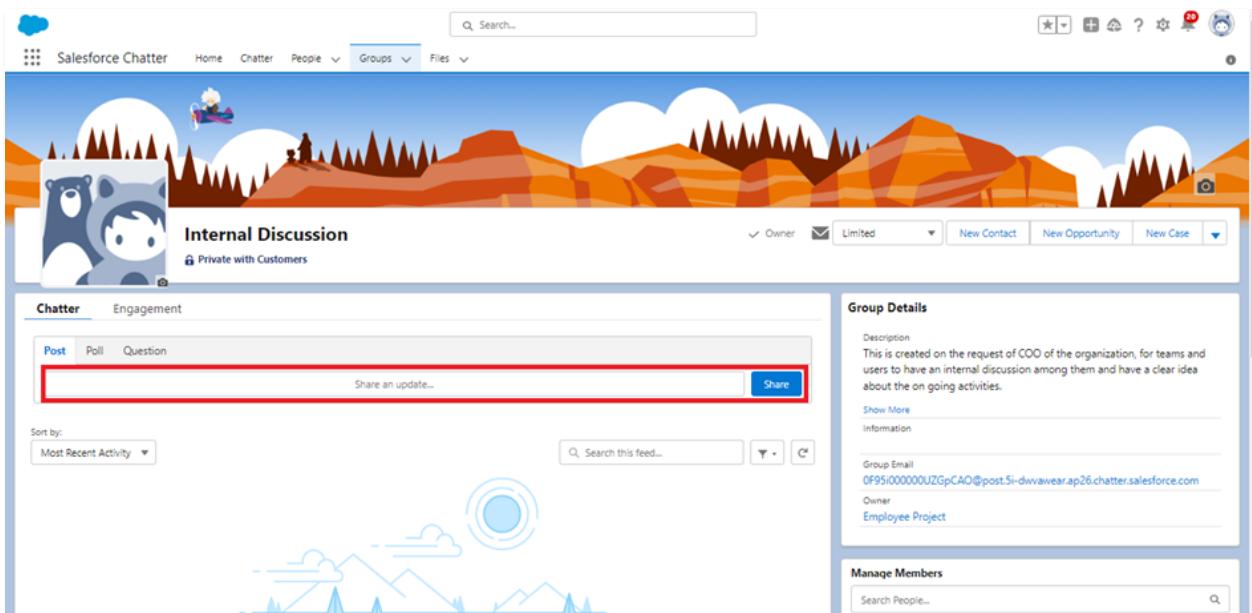
Manage Members

Search People...

	Jason Mikaelson	X	Member ▾
	Elijah Mikaelson	X	Member ▾
	Kol Mikaelson	X	Member ▾
	Niklaus Mikaelson	+ Add	

Done

7. Click Done.



8. This is how your group interface looks like.
9. Where it says Share an update, post this message to the group: Welcome to the Internal Discussion Group, here you can post anything which is related to ongoing projects.
10. Click Share.

Note: You can like or comment on this post.

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.

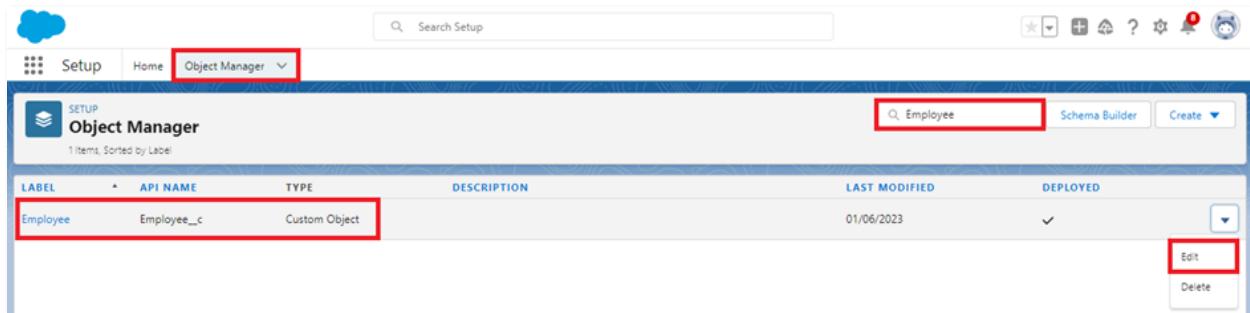
Use Case

All things done for the organization. But some of the organization employees feel it difficult to fill up all the details while creating an employee record, so Jai Prakash (COO) assigned you a task to create different forms for employee records based on their mode of work. As an Admin, you know how to achieve this.

Activity 1: Creating On Site Employee Record Type

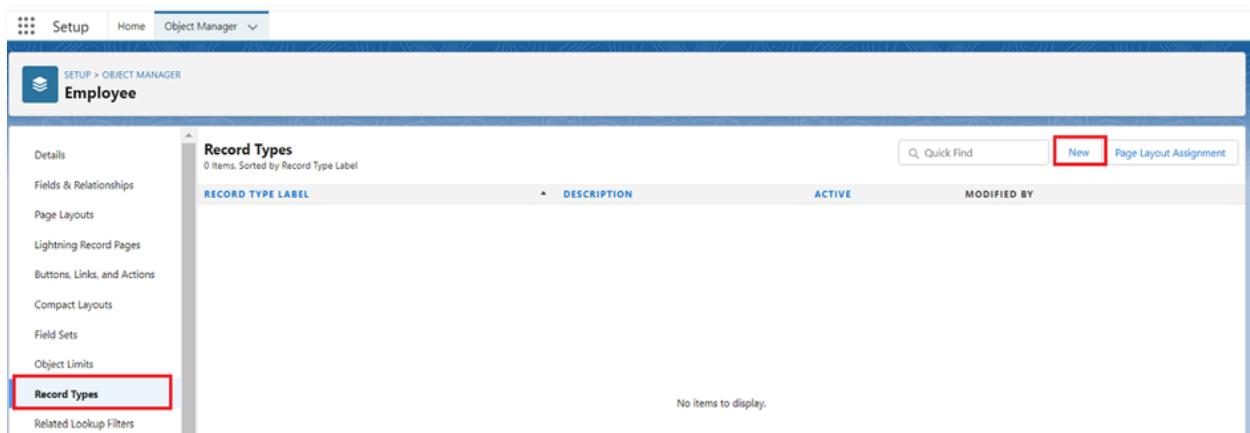
To create a Record Type:

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



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Employee'. Below the header, the 'Object Manager' section displays one item: 'Employee' (Label), 'Employee__c' (API Name), 'Custom Object' (Type). The 'LAST MODIFIED' column shows '01/06/2023'. The 'DEPLOYED' column has a dropdown arrow. At the bottom right of the table, there are 'Edit' and 'Delete' buttons, both of which are highlighted with red boxes.

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



The screenshot shows the 'Record Types' page under the 'Object Manager' section. The left sidebar lists various options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The 'Record Types' option is highlighted with a red box. The main content area shows a table titled 'Record Types' with one row: '0 items. Sorted by Record Type Label'. The columns are 'RECORD TYPE LABEL', 'DESCRIPTION', 'ACTIVE', and 'MODIFIED BY'. A 'Quick Find' search bar and 'New' button are at the top right of the table area. The message 'No items to display.' is shown at the bottom of the table.

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

New Record Type
Employee

Help for this Page

Step 1. Enter the details

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

Record Type

Existing Record Type	-Master--
Record Type Label	On Site Employee
Record Type Name	On_Site_Employee
Description	
Active	<input checked="" type="checkbox"/>

Step 1 of 2

I = Required Information

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

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

4. Uncheck for “Make Available”.

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

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

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

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

Employee Record Type	On Site Employee																																														
Record Type Name	On_Site_Employee																																														
Description																																															
Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.																																															
<input type="radio"/> Apply one layout to all profiles <input type="radio"/> Apply a different layout for each profile																																															
Profile:	Page Layout																																														
Analytics Cloud Integration User	Employee Layout																																														
Analytics Cloud Security User	Employee Layout																																														
<table border="1"> <tr> <td>Custom: Sales Profile</td> <td>Employee Layout</td> </tr> <tr> <td>Custom: Support Profile</td> <td>Employee Layout</td> </tr> <tr> <td>Force.com - App Subscription User</td> <td>Employee Layout</td> </tr> <tr> <td>Force.com - Free User</td> <td>Employee Layout</td> </tr> <tr> <td>Gold Partner User</td> <td>Employee Layout</td> </tr> <tr> <td>HR</td> <td>Employee Layout</td> </tr> <tr> <td>Identity User</td> <td>Employee Layout</td> </tr> <tr> <td>Manager</td> <td>On Site Employee layout</td> </tr> <tr> <td>Marketing User</td> <td>Employee Layout</td> </tr> <tr> <td>Minimum Access - Salesforce</td> <td>Employee Layout</td> </tr> <tr> <td>On Site Employee</td> <td>Employee Layout</td> </tr> <tr> <td>Partner App Subscription User</td> <td>Employee Layout</td> </tr> <tr> <td>Partner Community Login User</td> <td>Employee Layout</td> </tr> <tr> <td>Partner Community User</td> <td>Employee Layout</td> </tr> <tr> <td>Read Only</td> <td>Employee Layout</td> </tr> <tr> <td>Remote Employee</td> <td>Employee Layout</td> </tr> <tr> <td>Salesforce API Only System Integrations</td> <td>Employee Layout</td> </tr> <tr> <td>Silver Partner User</td> <td>Employee Layout</td> </tr> <tr> <td>Solution Manager</td> <td>Employee Layout</td> </tr> <tr> <td>Standard Platform User</td> <td>Employee Layout</td> </tr> <tr> <td>Standard User</td> <td>Employee Layout</td> </tr> <tr> <td>System Administrator</td> <td>On Site Employee layout</td> </tr> <tr> <td>Work.com Only User</td> <td>Employee Layout</td> </tr> </table>		Custom: Sales Profile	Employee Layout	Custom: Support Profile	Employee Layout	Force.com - App Subscription User	Employee Layout	Force.com - Free User	Employee Layout	Gold Partner User	Employee Layout	HR	Employee Layout	Identity User	Employee Layout	Manager	On Site Employee layout	Marketing User	Employee Layout	Minimum Access - Salesforce	Employee Layout	On Site Employee	Employee Layout	Partner App Subscription User	Employee Layout	Partner Community Login User	Employee Layout	Partner Community User	Employee Layout	Read Only	Employee Layout	Remote Employee	Employee Layout	Salesforce API Only System Integrations	Employee Layout	Silver Partner User	Employee Layout	Solution Manager	Employee Layout	Standard Platform User	Employee Layout	Standard User	Employee Layout	System Administrator	On Site Employee layout	Work.com Only User	Employee Layout
Custom: Sales Profile	Employee Layout																																														
Custom: Support Profile	Employee Layout																																														
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Salesforce API Only System Integrations	Employee Layout																																														
Silver Partner User	Employee Layout																																														
Solution Manager	Employee Layout																																														
Standard Platform User	Employee Layout																																														
Standard User	Employee Layout																																														
System Administrator	On Site Employee layout																																														
Work.com Only User	Employee Layout																																														
<input type="button" value="Previous"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>																																															

7. click Save.

Activity 2: Creating "Remote Employee" Record Type

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

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

Permission sets

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

edition, they can have multiple permission sets.

Use Case

Every day is a war for Admin with some unique challenges. A new challenge awaits as you enter the office. After you arrive in office you came to know that the manager is on leave and there's a lot work pending at his desk generally there are numbers of employee records that the manager have to enter in the salesforce org and no other person have the permission to create those records except him and your CEO wants it to be done by the end of the day, as it's not possible to create the same profile and assigned it to some other person in the org. So using your admin knowledge you came up with the idea to create a permission set and assign it to someone who doesn't have the access to do that job.

Let's create a permission set.

Activity 1: Creating a permission set

To Create a Permission Set:

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup' (highlighted with a red box), 'Home', 'Object Manager', and various icons. On the left sidebar, 'Permission Sets' is highlighted with a red box under the 'Users' section. The main content area is titled 'Permission Sets' and displays a list of existing permission sets. A 'New' button is highlighted with a red box at the top left of the list. The list includes entries like 'B2B Buyer Permission Set One Seat' and 'B2B Buyer Manager Permission Set One Seat'. At the bottom of the list, there is a note: 'Access agent features in Service Cloud Voice contact centers that u... Service Cloud Voice User'.

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

Permission Set
Create

Save Cancel

Enter permission set information

Label	Per to Emp
API Name	Per_to_Emp
Description	
Session Activation Required	<input type="checkbox"/> i

3. Under Apps Select object settings.

Apps

- [Assigned Apps](#)
Settings that specify which apps are visible in the app menu
- [Assigned Connected Apps](#)
Settings that specify which connected apps are visible in the app menu
- [Object Settings](#)**
Permissions to access objects and fields, and settings such as tab availability
- [App Permissions](#)
Permissions to perform app-specific actions, such as "Manage Call Centers"
- [Apex Class Access](#)
Permissions to execute Apex classes
- [Visualforce Page Access](#)
Permissions to execute Visualforce pages
- [External Data Source Access](#)
Permissions to authenticate against external data sources
- [Flow Access](#)
Permissions to execute Flows
- [Named Credential Access](#)
Permissions to authenticate against named credentials
- [Custom Permissions](#)
Permissions to access custom processes and apps
- [Custom Metadata Types](#)
Permissions to access custom metadata types
- [Custom Setting Definitions](#)
Permissions to access custom settings

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

Permission Set
Adding Employee

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

Permission Set Overview > Object Settings ▾ Employees ▾

Employees Save Cancel

Tab Settings

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

Employee: Record Type Assignments

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

Object Permissions

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

5. Click on Save.

6. After saving the permission click on the Manage assignment

SETUP
Permission Sets

Permission Set
Adding Employee

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

Permission Set Overview > Object Settings ▾ Employees ▾

Employees Edit

Tab Settings

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

7. Now click on the Manage Assignment.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. On the left sidebar, under 'Users', 'Custom Permissions' is selected. The main content area is titled 'Adding Employee' and shows 'Current Assignments'. A red box highlights the 'Add Assignment' button in the top right corner of the assignment list.

8. Click on Add Assignment.

The screenshot shows the 'Select Users to Assign' dialog. It lists users under 'All Users'. The user 'Elijah Mikaelson' (emika) is selected and highlighted with a red box. The 'Next' button at the bottom right is also highlighted with a red box.

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00d5i00000ewzcbea5.165fc3eew2or@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
demo project	dproj	nadeem@smart.com	System Administrator	<input checked="" type="checkbox"/>	
Elijah Mikaelson	emika	elijah@smart.com	On Site Employee	<input checked="" type="checkbox"/>	On Site Employee
Integration User	integ	integration@00d5i00000ewzcbea5.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
Jason Mikaelson	jmika	jason@smart.com	Remote Employee	<input checked="" type="checkbox"/>	Remote Employee
Kol Mikaelson	kmika	kol@smart.com	Manager	<input checked="" type="checkbox"/>	Manager
Niklaus Mikaelson	nmika	nikmik@smart.com	HR	<input checked="" type="checkbox"/>	HR

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

Use Case

The CEO of an organization wants to have a brief data on employees working, projects in take, project progress, Assets assigned, what are the conditions of the Assets assigned. So he can have a clear picture of his organization and be able to make any decisions required based on this data. So he calls you on this task and wants you to represent the data in an appropriate way.

Let's create a Report.

Activity 1: Create Report

To Create a Report:

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

The screenshot shows the 'Employee Management' application interface. At the top, there's a navigation bar with links for Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports (which is highlighted with a red box), and Dashboards. Below the navigation is a search bar labeled 'Search...'. On the left, there's a sidebar with 'Reports' and 'Recent' sections, and buttons for 'New Report' and 'New Folder'. The main area displays a table of reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. Two reports are listed: 'Employee's working on projects report' and 'Assets assigned to Employees'. A legend on the right indicates that blue items are 'Created by Me', grey items are 'Private Reports', and white items are 'Public Reports'.

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

The screenshot shows the 'Create Report' dialog. On the left, there's a sidebar with categories like Recently Used, All, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, and Price Books, Products and Assets. The 'All' category is selected. In the center, there's a search bar labeled 'Select a Report Type' with a placeholder 'employee'. Below it is a table titled 'Report Type Name' with several options: Activities with Employees, Employees, Employees with Reports to, Employees with ProjectTasks and Projects, Employee History, Assets with Employee Name, and Projects with ProjectTasks and Employees. To the right, there's a 'Details' panel for the 'Employees' report type, which is a 'Standard Report Type'. It includes a 'Start Report' button (highlighted with a red box), a 'Details' section (with a 'Fields (26)' link), and sections for 'Created By You' and 'Created By Others' (both showing 'No Reports Yet').

4. Customize your report

--> Add fields from left pane as shown below

Employee Manage... Home Employees Assets Asset Services Projects ProjectTasks Reports Dashboards

REPORT New Employees Report Employees

Fields Outline Filters 1

Groups GROUP ROWS Add group...

Columns Add column...

Employee Employee Name Employee ID Reports to Login Time Logout Time Mode of Work LinkedIn Profile

1 Employee #005-00000HVVY - - - - - <http://https://linkedin.in>

2 Emp for Junction test #005-00000HVVY - 8:00 am 5:00 pm - <http://https://linkedin.in>

Add column...

Employee Employee Name Employee ID Reports to Login Time Logout Time Mode of Work LinkedIn Profile

Save & Run Save Close Run

Update Preview Automatically

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.

Use Case

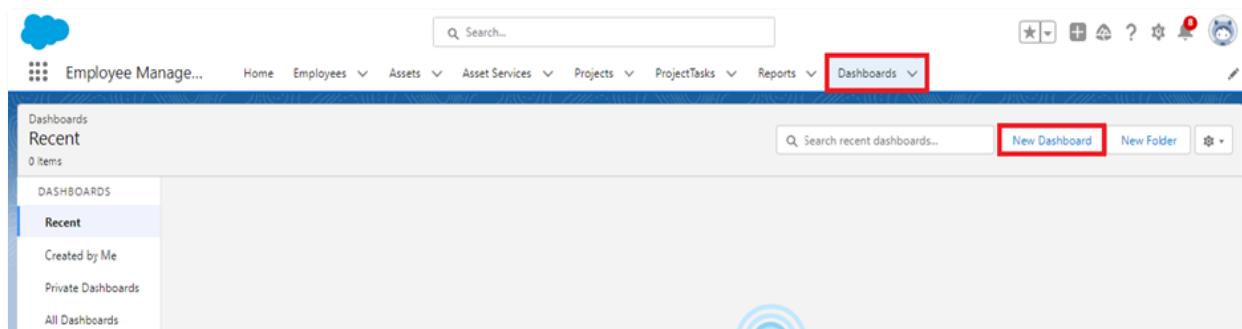
As an Admin for the organization you keep pushing yourself to reach out the business requirements to take the organization to peak heights and all your superiors are very

much impressed with your efforts and work dedication. In addition with reports you make an ease for the CEO in viewing the reports with data visualization. So he doesn't have to search for the data he wants during the meetings.

Activity 1: Create Dashboard

To Create a Dashboard

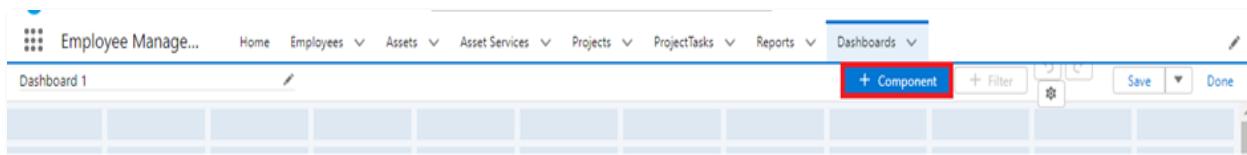
1. Go to the app --> click on the Dashboards tabs.



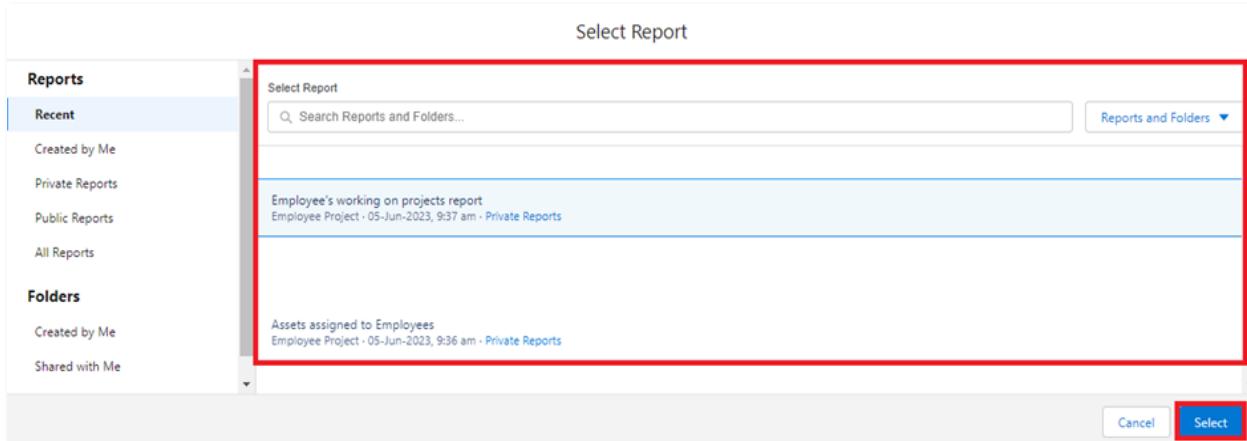
2. Give a Name and click on Create.

A screenshot of the 'New Dashboard' creation dialog box. It has a title 'New Dashboard'. There are three input fields: 'Name' (containing 'Dashboard 1'), 'Description' (empty), and 'Folder' (containing 'Private Dashboards'). To the right of the folder field is a 'Select Folder' button. At the bottom right 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:

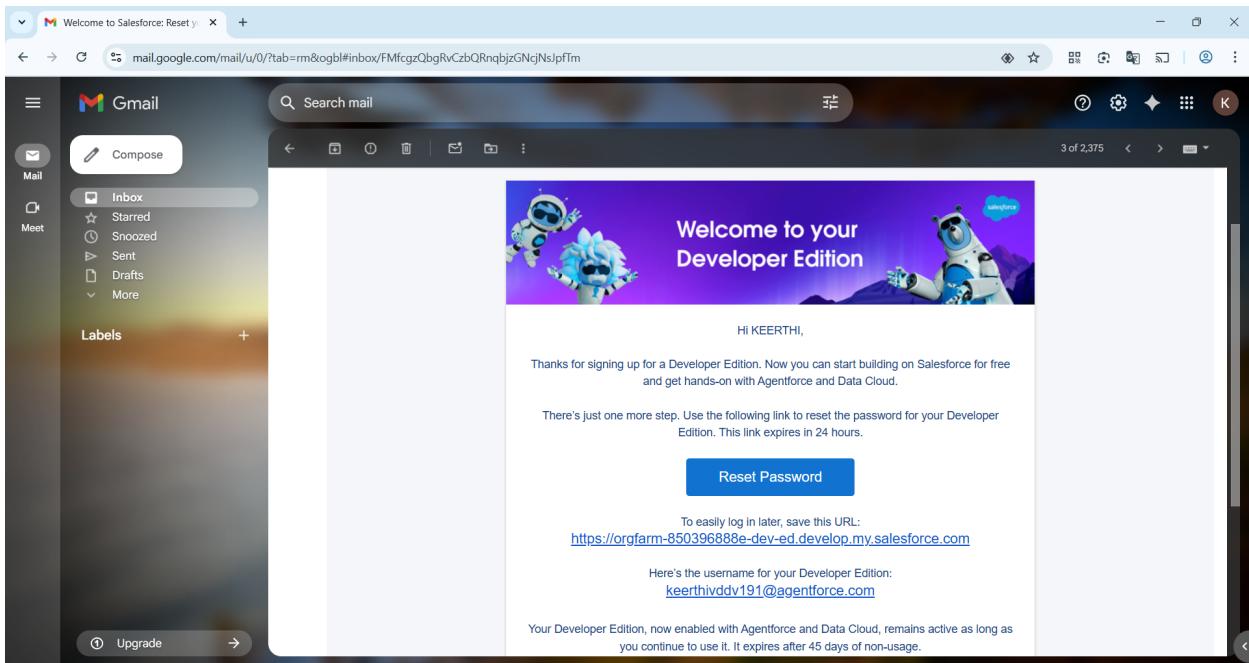
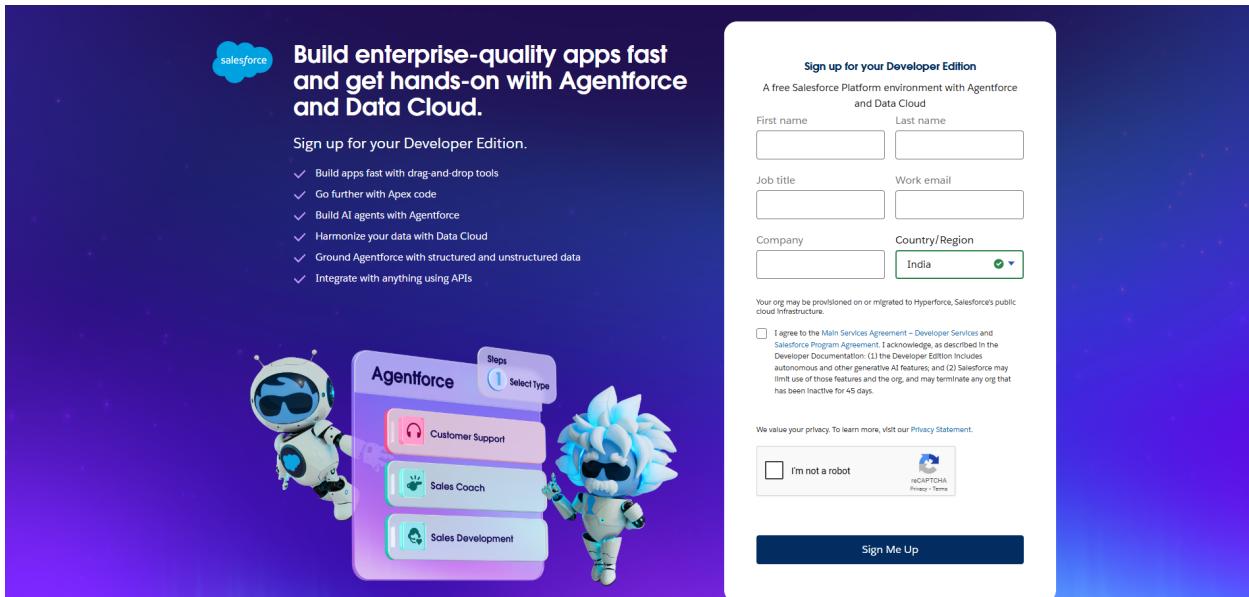
Create another Dashboard as we discussed in activity 1.

Conclusion

The Workforce Administration Solution project successfully demonstrates how Salesforce can be utilized to streamline and automate key HR operations within an organization. By configuring custom objects, establishing secure data relationships, and implementing user roles, profiles, reports, and dashboards, the project provides a functional and scalable framework for managing employee data efficiently.

This hands-on experience enhanced my understanding of Salesforce fundamentals and provided real-time exposure to CRM-based application development. It has strengthened my ability to design, build, and present practical solutions that align with business needs.

Additional Screen Captures



The screenshot shows the Salesforce Setup interface for the Employee object. The left sidebar lists various configuration options under 'Details'. The main 'Details' section shows the API Name 'Employee__c' and other settings like 'Enable Reports' (unchecked), 'Track Activities', and 'Deployment Status' (Deployed). The URL in the browser is <https://orgfarm-85039688e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001KJ5x/Details/view>.

The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar has 'Tabs' selected. The main area displays the 'Custom Tabs' section, which allows creating new tabs. It includes sections for 'Custom Object Tabs' (listing Assets, Asset Services, Employees, Projects, and ProjectTasks with their respective tab styles) and 'Web Tabs' (not defined). The URL in the browser is <https://orgfarm-85039688e-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home>.

The screenshot shows the Salesforce Lightning Experience Home page. At the top, there's a navigation bar with links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. Below the navigation is the App Launcher, which contains various app cards such as Service Console, Sales, Lightning Usage App, Digital Experiences, Bolt Solutions, Data Cloud, Approvals, My Service Journey, Automation, and Workforce Administrator Solution. A search bar at the top of the launcher says "Search apps or items...". On the left, there are sidebar sections for Client Options, Business Leads, and To Do List. At the bottom, there are buttons for "0 Upcoming Activity" and a "+" sign.

The screenshot shows the Salesforce Setup Object Manager for the Employee object. The top navigation bar includes links for All, Employees, and Employee. The main area displays the "Fields & Relationships" section for the Employee object. It lists 26 fields and relationships, each with its name, label, and type. The fields include Age, Age_c, Formula (Number), Cab Allowance, Cab_Allowance__c, Checkbox, Cab Allowance Amount, Cab_Allowance_Amount__c, Currency(18, 0), Created By, CreatedById, Lookup(User), Date of Birth, Date_of_Birth__c, Date, Email, Email__c, Email, Employee ID, Name, Auto Number, Employee Name, Employee_Name__c, Text(18), Experience, Experience__c, Text Area(255), and Food Allowance Amount, Food_Allowance_Amount__c, Currency(18, 0). On the left, a sidebar lists various setup categories like 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, and Scoping Rules. The top right of the page has a search bar and several utility icons.

All | Employees | Salesforce Employee | Salesforce orgfarm-85039688e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001KJ5x/FieldsAndRelationships/view

Employee

Fields & Relationships
26 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Login Time	Login_Time__c	Time
Logout Time	Logout_Time__c	Time
Mode of Work	Mode_of_Work__c	Picklist
Owner	OwnerId	Lookup(User,Group)
Phone no	Phone_no__c	Phone
Qualification	Qualification__c	Text(20)
Record Type	RecordTypeId	Record Type
Reports to	Reports_to__c	Lookup(Employee)
Wifi Allowance Amount	Wifi_Allowance_Amount__c	Currency(18, 0)
Wifi Allowances	Wifi_Allowances__c	Checkbox

All | Employees | Salesforce Project | Salesforce orgfarm-85039688e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001KJ7Z/FieldsAndRelationships/view

Project

Fields & Relationships
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
End Date	End_Date__c	Date		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Project ID	Name	Auto Number		
Project Lead	Project_Lead__c	Text(20)		
Project Name	Project_Name__c	Text(20)		
Project Status	Project_Status__c	Picklist		
Start Date	Start_Date__c	Date		

All | Employees | Salesforce ProjectTask | Salesforce

orgfarm-85039688e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001KJCP/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
ProjectTask

Fields & Relationships
7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		✓
Employee Name	Employee__c	Master-Detail(Employee)		✓
Finishes in	Finishes_in__c	Formula (Number)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Project Task	Project_Task__c	Master-Detail(Project)		✓
Project Task Name	Name	Text(80)		✓
Working Hours	Working_Hours__c	Number(18, 0)		✓

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

All | Employees | Salesforce Asset | Salesforce

orgfarm-85039688e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001KE1/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Asset

Fields & Relationships
8 Items, Sorted by Field Label

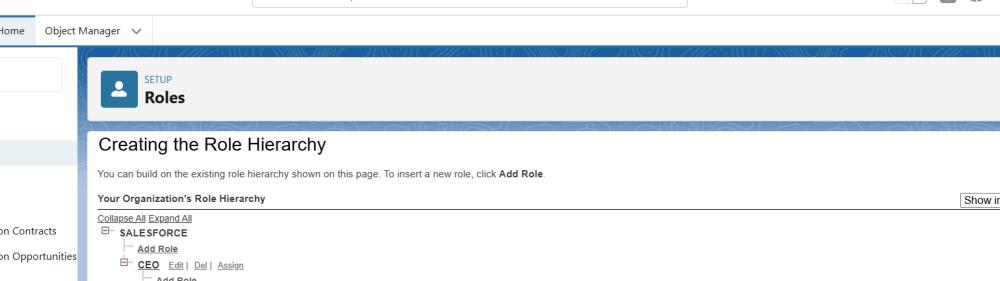
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Name	Name	Text(80)		✓
Asset Type	Asset_Type__c	Picklist		✓
Created By	CreatedById	Lookup(User)		✓
Date Of Issue	Date_of_Issue__c	Formula (Date)		✓
Employee Name	Employee_Name__c	Lookup(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Model Name	Model_Name__c	Text(20)		✓
Owner	OwnerId	Lookup(User,Group)		✓

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

Fields & Relationships				
9 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Id	Asset_Id__c	Lookup(Asset)		✓
Asset Service Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(32768)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Subject	Subject__c	Text Area(255)		
Technician	Technician__c	Text(18)		
Type	Type__c	Picklist		

The screenshot shows the Salesforce Lightning interface for the 'Employees' list view. The top navigation bar includes links for 'Employees', 'Projects', 'ProjectTasks', 'Assets', 'Asset Services', 'Reports', and 'Dashboards'. Below the navigation is a search bar with placeholder text 'Search...'. The main content area displays a table with 14 items, each representing an employee with a unique ID (e.g., EMS-0004 to EMS-0017). The table includes columns for selection, Employee ID, Name, Department, Status, and Actions. A toolbar at the top of the list view provides options for 'New', 'Import', 'Change Owner', 'Printable View', and 'Assign Label'. A search bar at the bottom of the list view allows users to search for specific employees.

	Employee ID	Name	Department	Status	Action
1	EMS-0004	John Doe	Marketing	Active	
2	EMS-0005	Jane Smith	Sales	Active	
3	EMS-0006	Mike Johnson	Customer Support	Active	
4	EMS-0007	Alice Williams	Product Management	Active	
5	EMS-0008	Bob Brown	Engineering	Active	
6	EMS-0009	Charlie Green	Finance	Active	
7	EMS-0010	Diana Blue	HR	Active	
8	EMS-0011	Eve White	Logistics	Active	
9	EMS-0012	Fiona Black	R&D	Active	
10	EMS-0013	George Grey	Manufacturing	Active	
11	EMS-0014	Hannah Purple	Quality Control	Active	
12	EMS-0015	Ivan Orange	Supply Chain	Active	
13	EMS-0016	Jordan Yellow	Customer Experience	Active	
14	EMS-0017	Karen Red	Product Design	Active	



The screenshot shows the Salesforce Setup interface for managing roles. The left sidebar navigation includes 'Users' (with 'Roles' selected), 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'), 'Service' (with 'Case Teams' and 'Case Team Roles'), and 'Contact Roles on Cases'. A search bar at the top has 'role' typed into it. The main content area is titled 'Creating the Role Hierarchy' and displays a tree view of roles under 'Your Organization's Role Hierarchy'. The hierarchy starts with 'SALESFORCE' (which is collapsed). Under 'SALESFORCE', there are 'Add Role' and several specific roles: 'CEO', 'CFO', 'COO', 'HR', 'Manager', 'On_Site_Employee', 'Remote_Employee', 'SVP_Customer_Service & Support', 'SVP_Human_Resources', and 'SVP_Sales & Marketing'. Each role node has 'Edit | Del | Assign' links. A 'Help for this Page' link is located in the top right corner.

All | Employees | Salesforce Users | Salesforce

orgfarm-850396888e-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Users

Search Setup

Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty_00dgk000007nbtpuaj_fjrxkaggdja@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	EPIC_OrgFarm	EPIC	epic_efmf62eb4bf@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Mikaelson_Kol	kmika	kol@mikaelson.text	Manager	<input checked="" type="checkbox"/>	Manager
Edit	Mikaelson_Niklaus	nmika	niklaus@mikaelson.text	HR	<input checked="" type="checkbox"/>	HR
Edit	Park_Julia	jpark	julia@park.text	On Site Employee	<input checked="" type="checkbox"/>	On Site Employee
Edit	User_Integration	integ	integration@00dgk000007nbtpuaj.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00dgk000007nbtpuaj.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
Edit	V.D.D.V KEERTHI	kee	keerthivddy191@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Vadamodula_Mine	mvada	mine@vadamodula.text	Remote Employee	<input checked="" type="checkbox"/>	Remote Employee

New User | Reset Password(s) | Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | [All](#)

All | Employees | Salesforce Employee | Salesforce

orgfarm-850396888e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IgK000001KJ5x/PageLayouts/view

Setup Home Object Manager

Employee

SETUP > OBJECT MANAGER

Page Layouts

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

Page Layouts
3 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Employee Layout	KEERTHI V.D.D.V, 7/28/2025, 11:33 AM	KEERTHI V.D.D.V, 7/29/2025, 10:01 AM
On Site Employee Layout	KEERTHI V.D.D.V, 7/29/2025, 8:35 AM	KEERTHI V.D.D.V, 7/29/2025, 10:01 AM
Remote Employee Layout	KEERTHI V.D.D.V, 7/29/2025, 8:39 AM	KEERTHI V.D.D.V, 7/29/2025, 10:01 AM

Quick Find | New | Page Layout Assignment

All | Employees | Salesforce Internal Discussion | Salesforce orgfarm-850396888e-dev-ed.lightning.force.com/lightning/r/CollaborationGroup/0F9gK000000ydhSAA/view

Workforce Administ... Employees Projects ProjectTasks Assets Asset Services Reports Dashboards Internal Discussion

Internal Discussion

Owner Limited New Contact New Opportunity New Case

Private with Customers

Chatter Engagement

Post Poll Question

Share an update... Share

Sort by: Most Recent Activity

KEERTHI V.D.D.V Yesterday at 8:49 AM

Welcome to the Internal Discussion Group, here you can post anything which is related to ongoing projects.

Like Comment

Write a comment...

Group Details

Description An Internal Discussion Group.

Show More Information

Group Email 0F9gK000000ydhSAA@post.gk-7nbtptuui.can96.chatter.salesforce.com

Owner KEERTHI V.D.D.V

Manage Members

Search People...

Member Name Member Role

All | Employees | Salesforce Employee | Salesforce orgfarm-850396888e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000001KJ5x/RecordTypes/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Employee

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types

Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

Record Types 2 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
On Site Employee		✓	KEERTHI V.D.D.V, 7/29/2025, 8:53 AM
Remote Employee		✓	KEERTHI V.D.D.V, 7/29/2025, 8:56 AM

Quick Find New Page Layout Assignment

All | Employees | Salesforce Permission Sets | Salesforce

orgfarm-85039688e-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FOPsGK000004u2uT%3Fs%3DentityPermissions

Setup Home Object Manager

Search Setup

Hyperforce Assistant

Users

Permission Set Groups

Permission Sets

Apps

Mobile Apps

Salesforce

Mobile Builder for the Seller-Focused Experience

Feature Settings

Digital Experiences

Salesforce CMS

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

SETUP Permission Sets

Video Tutorial | Help for this Page

Permission Set Per to Emp

Find Settings... Clone Edit Properties Manage Assignments View Summary

Permission Set Overview > Object Settings Employees

Employees Tab Settings Edit

Available Visible

Employee: Record Type Assignments

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

Object Permissions

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

Recent | Reports | Salesforce

orgfarm-85039688e-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru

Workforce Administ...

Employees Projects ProjectTasks Assets Asset Services Reports Dashboards

Reports Recent 3 items

Report Name Description Folder Created By Created On Subscribed

New Employees Report	Private Reports	KEERTHI V.D.D.V	7/29/2025, 9:05 AM	<input checked="" type="checkbox"/>
Employees with ProjectTasks and Projects	Private Reports	KEERTHI V.D.D.V	7/29/2025, 9:53 AM	<input checked="" type="checkbox"/>
Employees with Assets	Private Reports	KEERTHI V.D.D.V	7/29/2025, 10:08 AM	<input checked="" type="checkbox"/>

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Search recent reports... New Report New Folder

New Employees Report | Salesforce

orgfarm-85039688e-dev-ed.develop.lightning.force.com/lightning/r/Report/00OgK000003nkZRUAY/view?queryScope=userFolders

Workforce Administ... Employees Projects ProjectTasks Assets Asset Services Reports Dashboards

Report: Employees
New Employees Report

Total Records
14

	Employee Name	Employee: ID	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
1	Chloe	a00gK00000By6m2	-	9:00 AM	5:00 PM	On Site	https://www.linkedin.com/in/chole
2	Scarlett	a00gK00000By6m1	-	-	-	Remote	https://www.linkedin.com/in/scarlett
3	Elizabeth	a00gK00000By6m0	-	-	-	Remote	https://www.linkedin.com/in/elizabeth
4	Amelia	a00gK00000By6l2	-	9:00 AM	5:00 PM	On Site	https://www.linkedin.com/in/amelia
5	Isabella	a00gK00000By6ly	-	9:00 AM	5:00 PM	On Site	https://www.linkedin.com/in/isabella
6	Sophia	a00gK00000By6lx	-	-	-	Remote	https://www.linkedin.com/in/sophia
7	Olivia	a00gK00000By6lw	-	-	-	Remote	https://www.linkedin.com/in/olivia
8	Emma	a00gK00000By6lv	-	-	-	Remote	https://www.linkedin.com/in/emma
9	Ethan	a00gK00000By6lu	-	9:00 AM	5:00 PM	On Site	https://www.linkedin.com/in/ethan
10	William	a00gK00000By6lt	-	9:00 AM	5:00 PM	On Site	https://www.linkedin.com/in/william
11	Alexander	a00gK00000By6ls	-	9:00 AM	5:00 PM	On Site	https://www.linkedin.com/in/alex
12	Benjamin	a00gK00000By6lr	-	-	-	Remote	https://www.linkedin.com/in/benjamin
13	James	a00gK00000By6lq	-	-	-	Remote	https://www.linkedin.com/in/james
14	Jackie Chan	a00gK00000By6lp	-	9:00 AM	5:00 PM	On Site	https://www.linkedin.com/in/jackie

Recent | Dashboards | Salesforce

orgfarm-85039688e-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mrn

Workforce Administ... Employees Projects ProjectTasks Assets Asset Services Reports Dashboards

Dashboards
Recent
2 items

	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Dashboard 2	Private Dashboards	KEERTHI V.D.V	KEERTHI V.D.V	7/29/2025, 10:14 AM	
Created by Me	Dashboard 1	Private Dashboards	KEERTHI V.D.V	KEERTHI V.D.V	7/29/2025, 10:12 AM	

DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites

Employee Name	Employee ID	Reports to	Login Time	Logout Time
Alexander	a00gK00000By6ls	-	9:00 AM	5:00 PM
Amelia	a00gK00000By6lz	-	9:00 AM	5:00 PM
Benjamin	a00gK00000By6lr	-	-	-
Chloe	a00gK00000By6m2	-	9:00 AM	5:00 PM
Elizabeth	a00gK00000By6m0	-	-	-
Emma	a00gK00000By6v0	-	-	-
Ethan	a00gK00000By6lu	-	9:00 AM	5:00 PM
Isabella	a00gK00000By6ly	-	9:00 AM	5:00 PM
Jackie Chan	a00gK00000By6lp	-	9:00 AM	5:00 PM
James	a00gK00000By6lq	-	-	-
Olivia	a00gK00000By6lw	-	-	-
Scarlett	a00gK00000By6m1	-	-	-
Sophia	a00gK00000By6lx	-	-	-

DEMO VIDEO :

https://drive.google.com/file/d/1eylaN0XK2_FSkMeu2T4RKaRzcc5yfWi3/view?usp=drive_link

GITHUB REPOSITORY:

<https://github.com/keerthivddv/Workforce-Administration-Solution>