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.

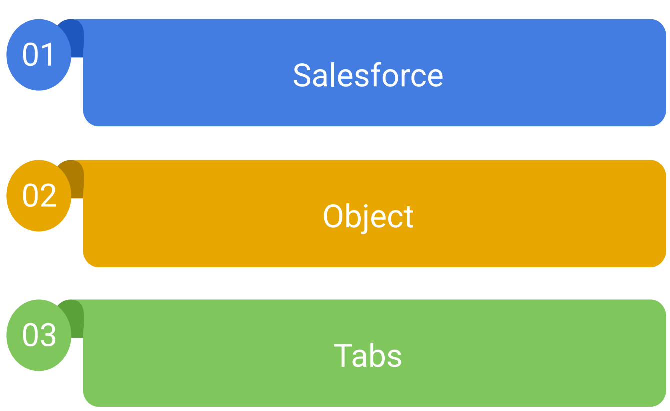
Objective:

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:



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Salesforce

Introduction:

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

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

What Is Salesforce?

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

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

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

https://youtu.be/r9EX3lGde5k

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

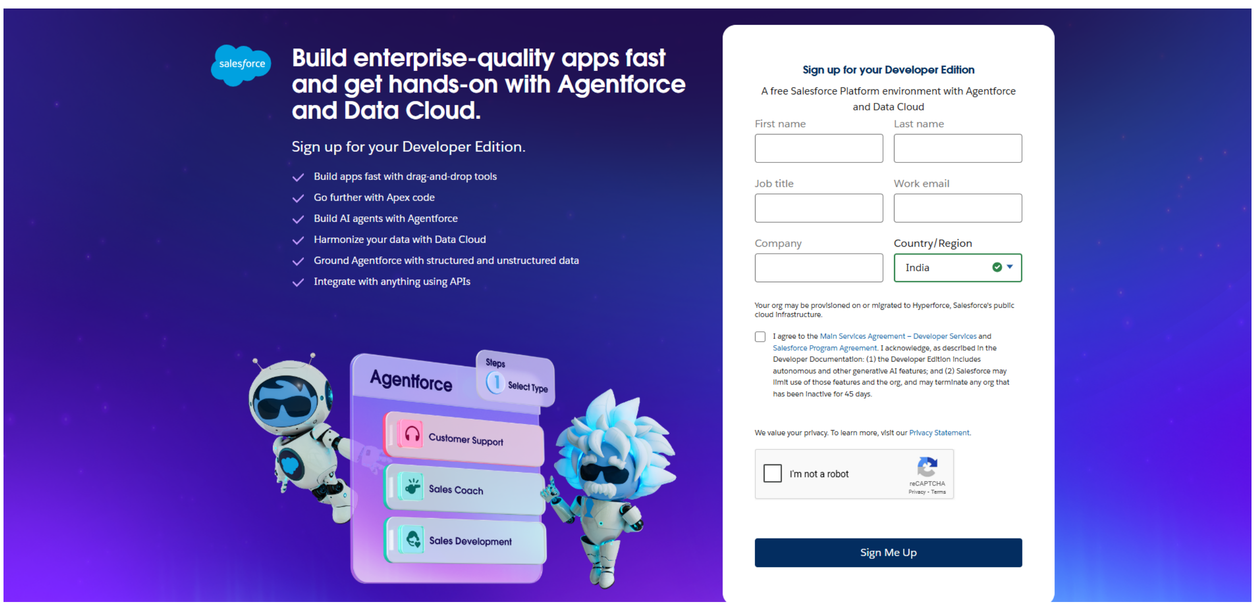
Let’s begin with creating our Salesforce Developer Account.

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 :

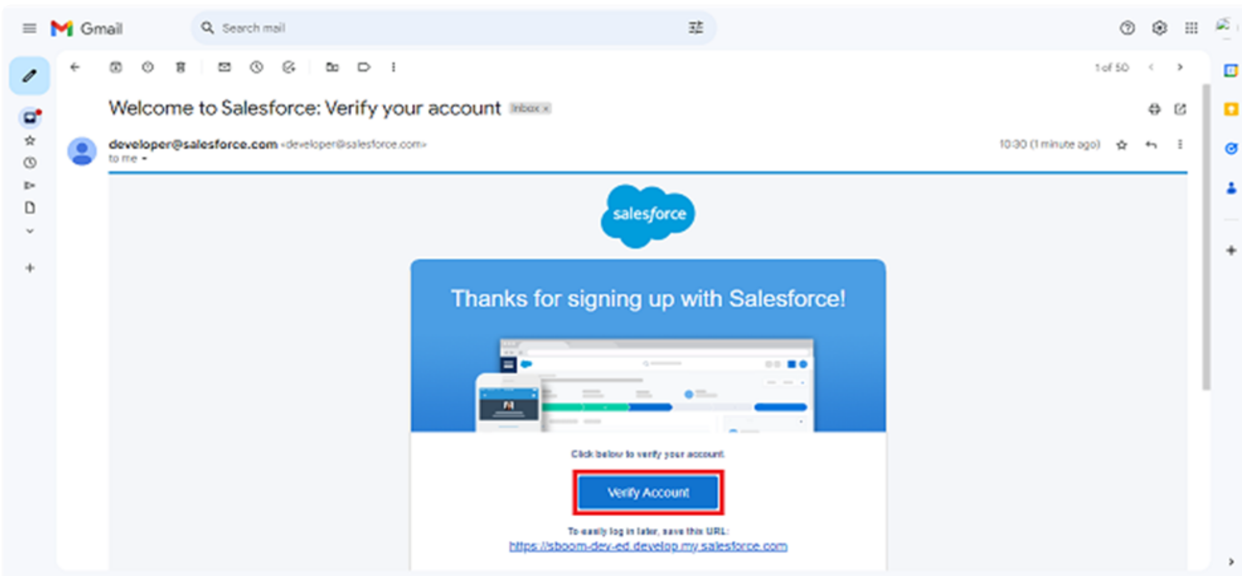


1. First name & Last name
2. Job Title & Work email
3. Role : Developer
4. Company : College Name or Organization
5. Country : India
6. Agree to Main Services Agreement and Verify Captcha

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.

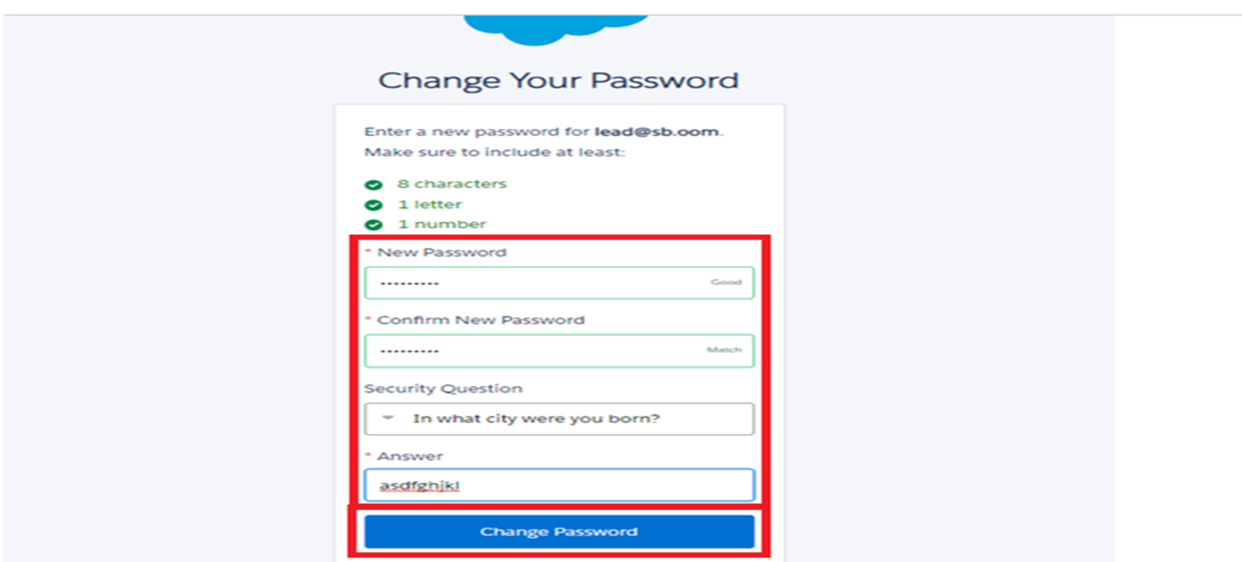
Activity 2: Account Activation

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.

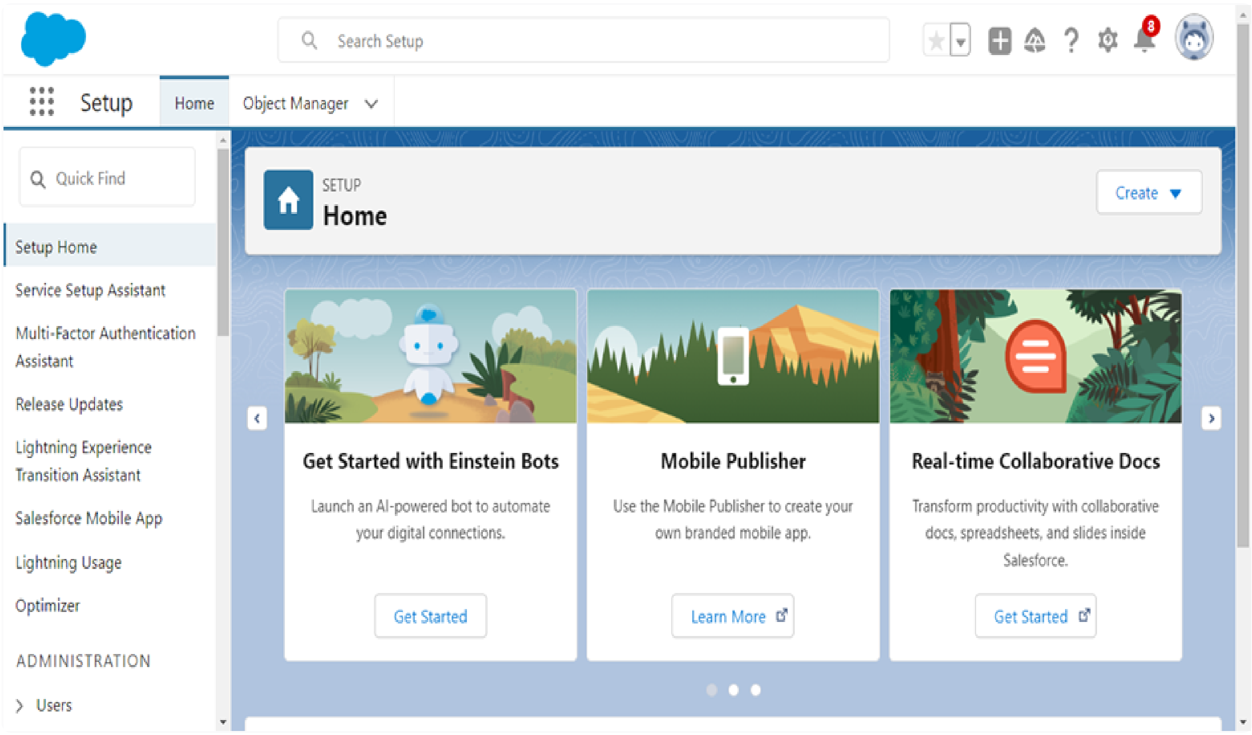


2. Click on Verify Account

3. Give a password and answer a security question and click on change password.



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.

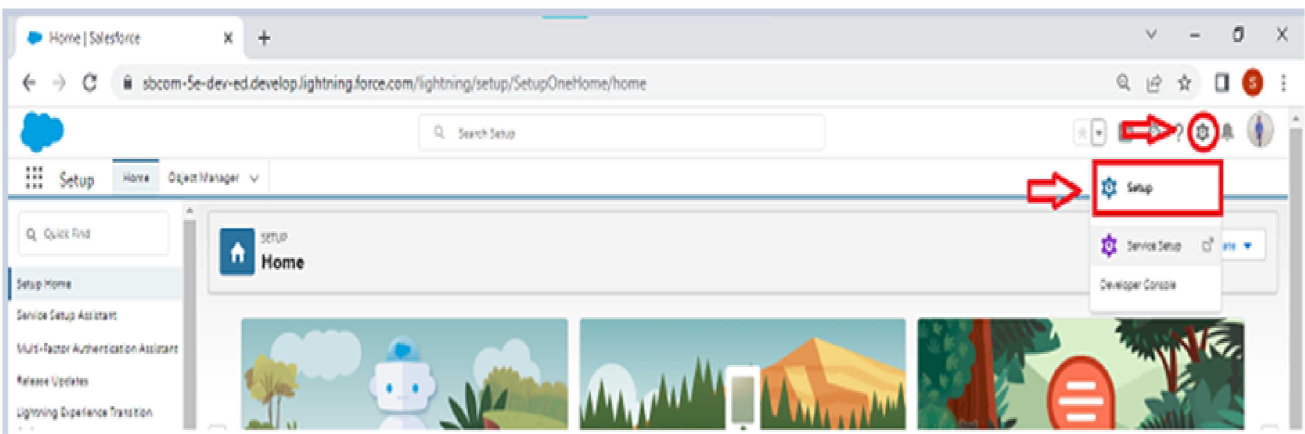
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

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.

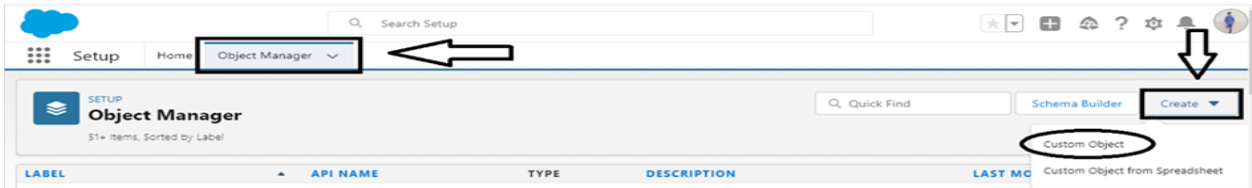


Activity 1: Create Employee Object

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.

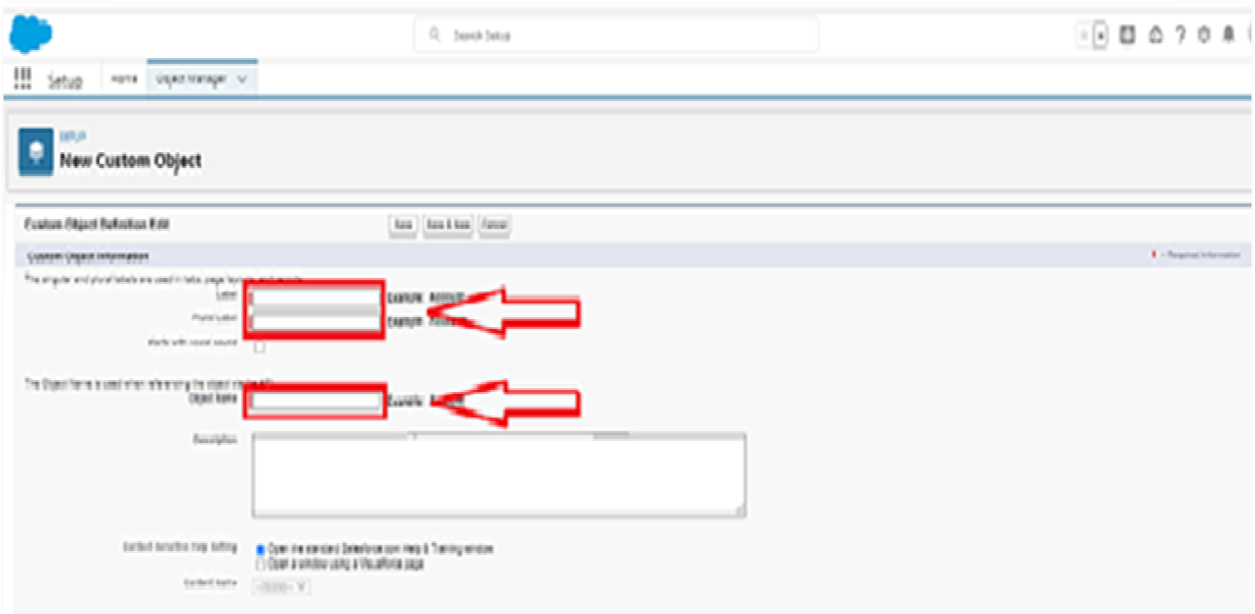
To create an object:

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



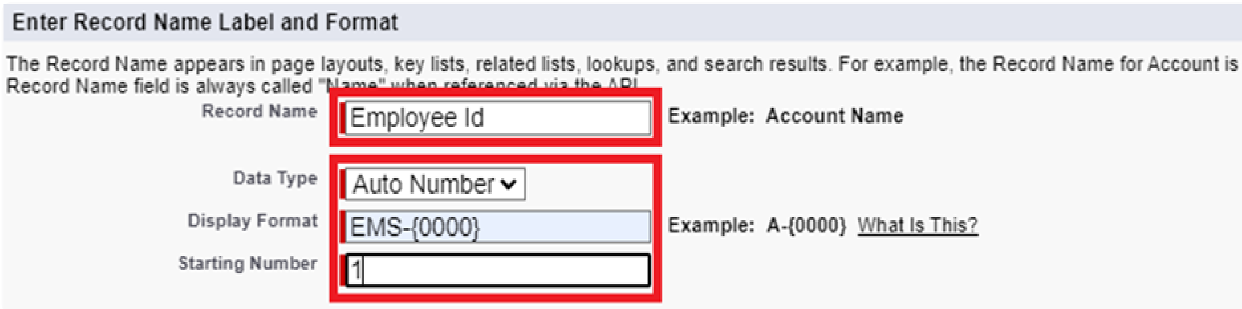
3) Enter Record Name Label and Format

1 Record Name : Employee ID

2 Data Type : Auto Number

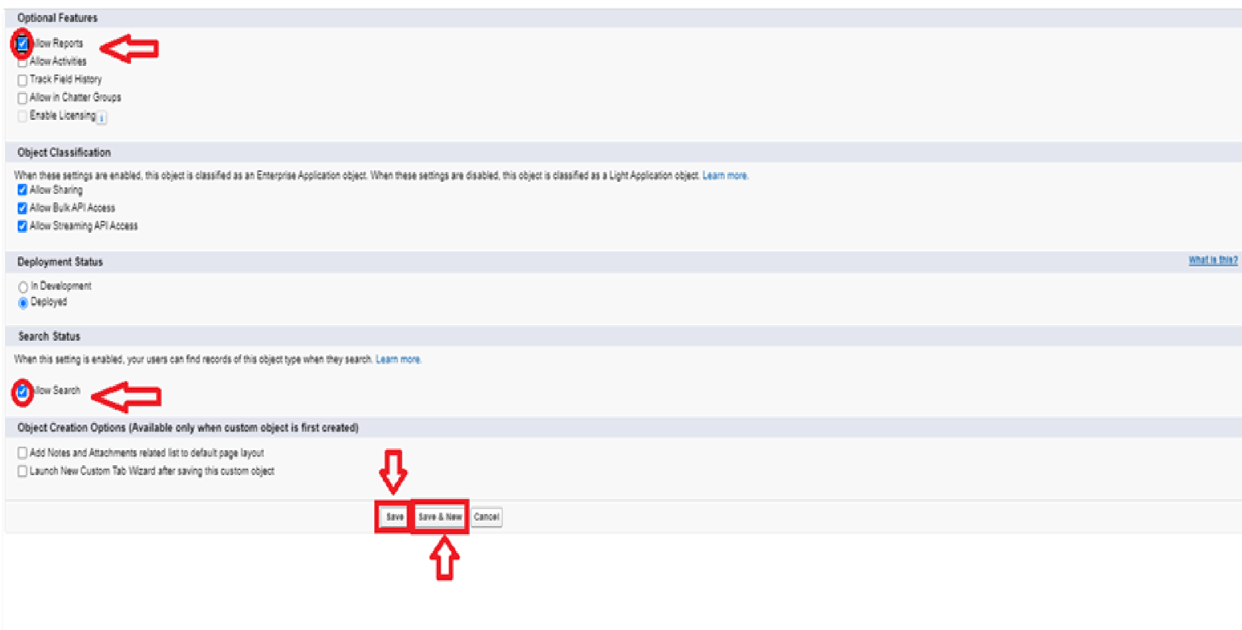
3 Display Format : EMS-{0000}

4 Starting Number : 1



2. Click on Allow reports,

3. Allow search --> Save.



Activity 2: Create Project Object

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

To create an object:

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

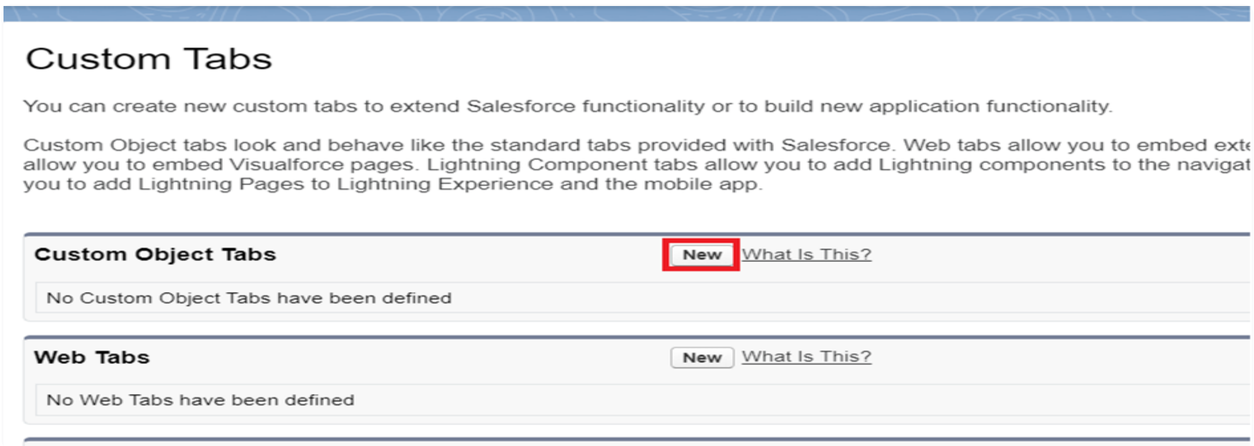
Use Case

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.

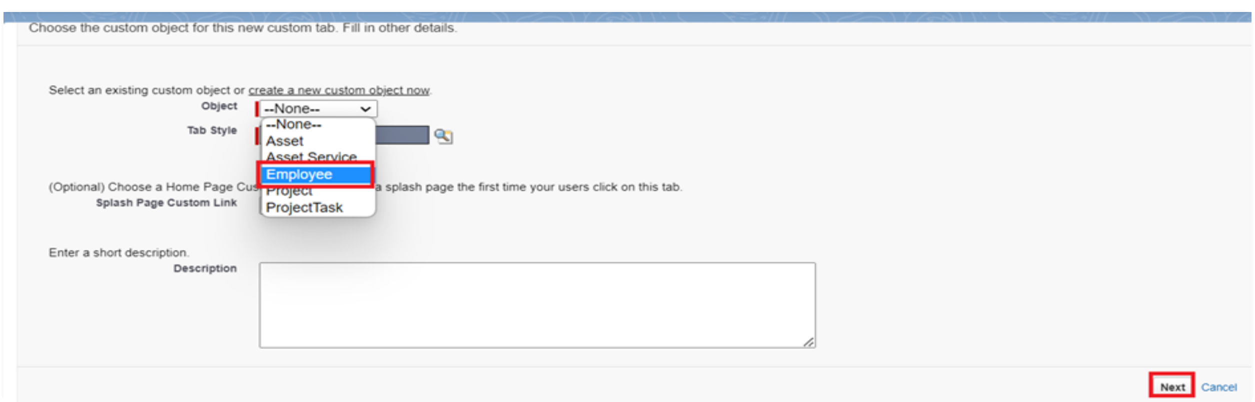
Activity 1: Creating a Custom Tab (Employee)

To create a Tab:(Employee)

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



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



Activity 2: Creating a Custom Tab (Project)

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

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

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

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.

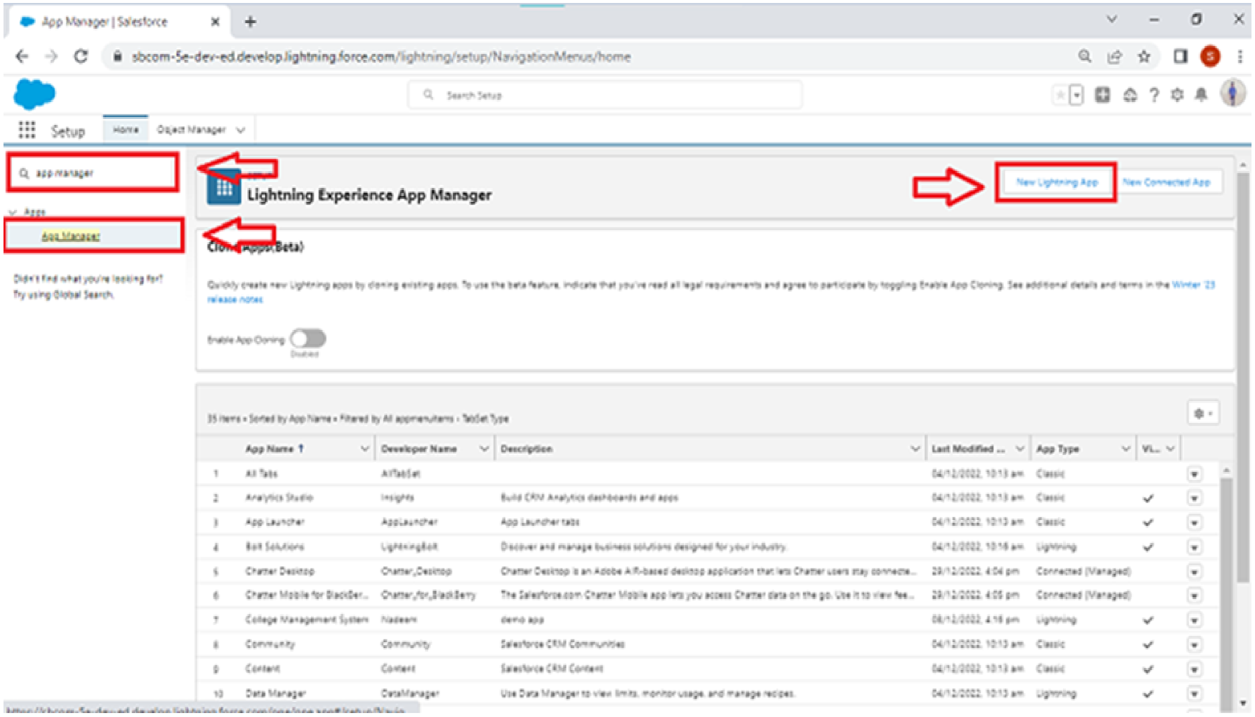
Use Case

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

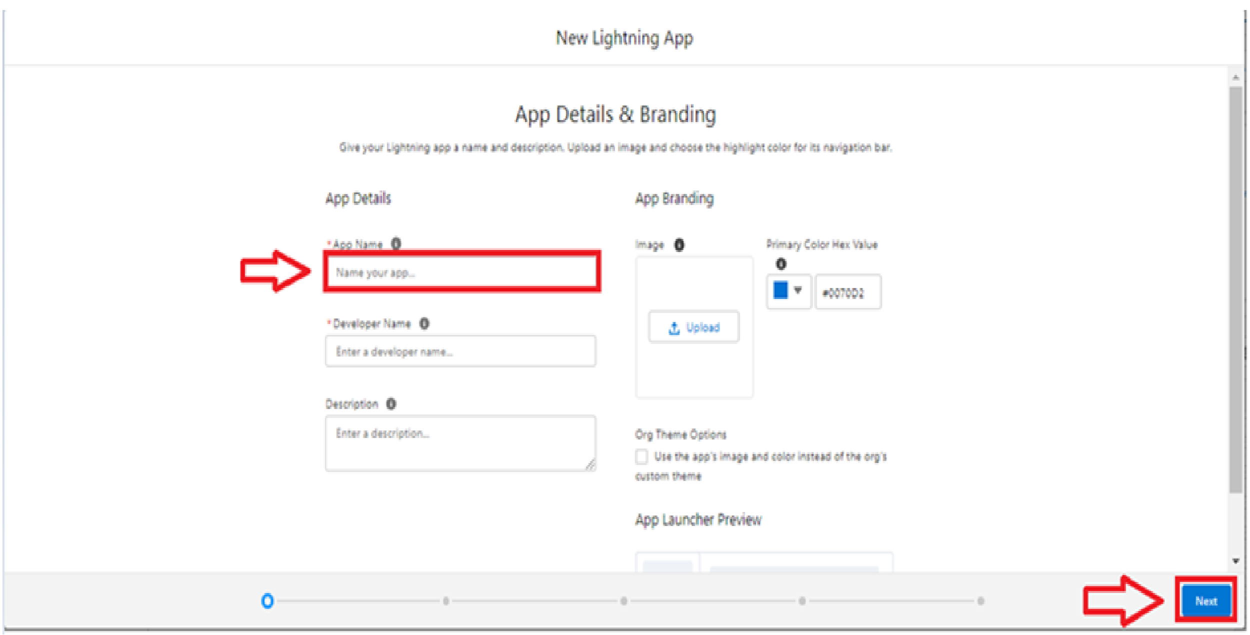
Developer Name : this will auto populated

Description : Give a meaningful description

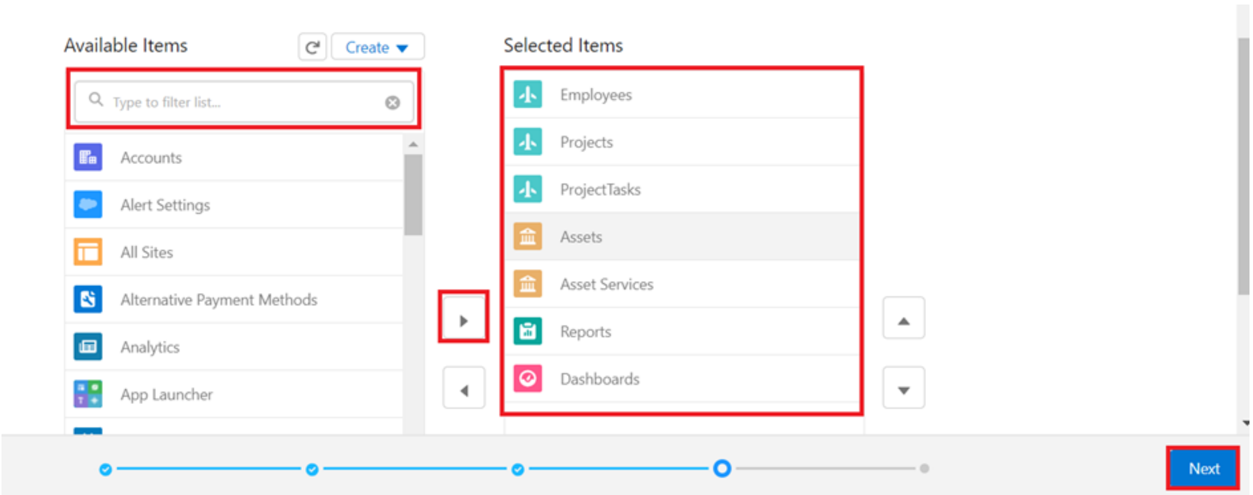
Image :

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.



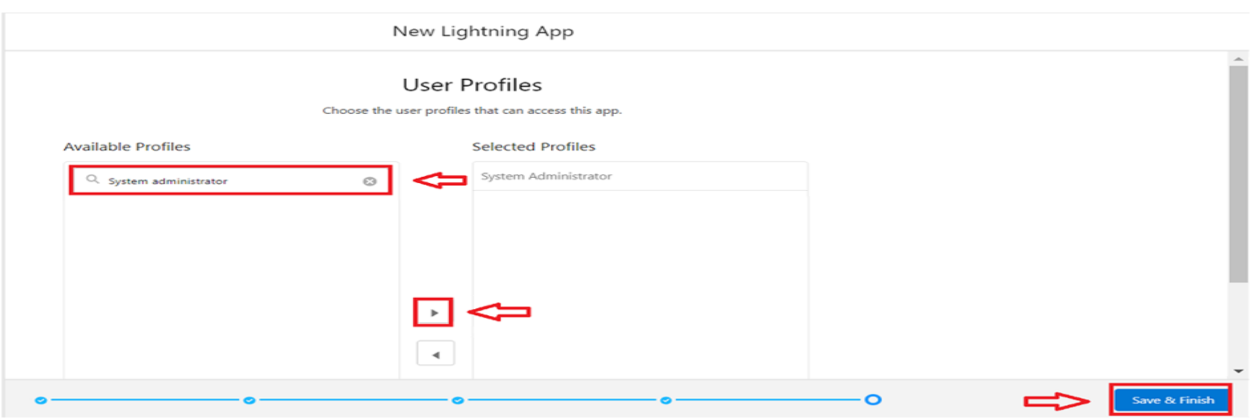
4. To Add Navigation Items:



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

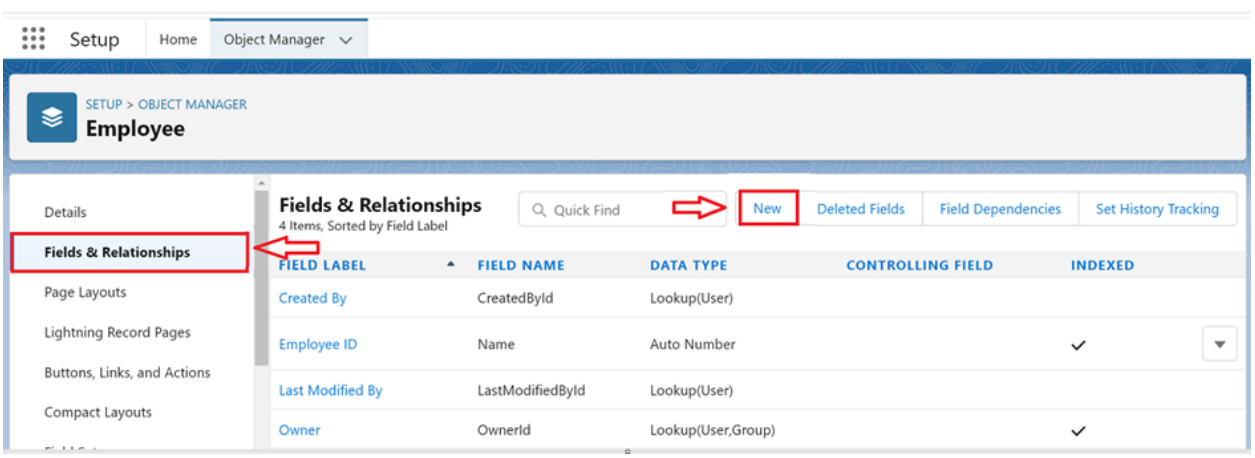
Now it’s time for you to think out of the box for your organization. You have successfully created the database objects for the organization but now all eyes turn on you as you have to define what sort of information the objects store which you have created. As a life saver of your organization you come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

Activity 1 : Creating Text Field in Employee Object

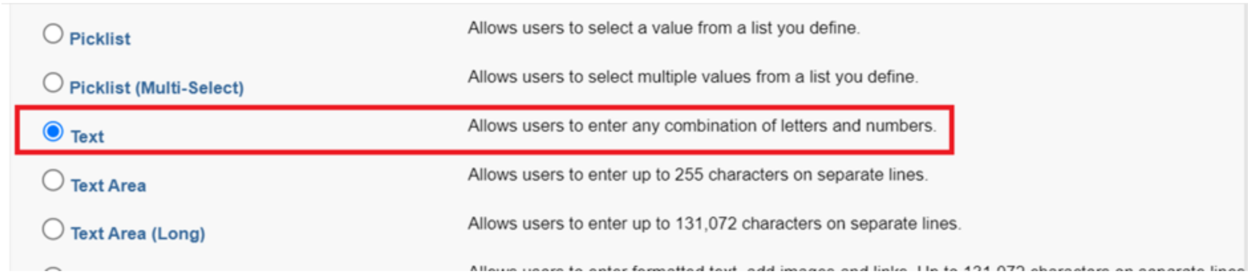
To create fields in an object:

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

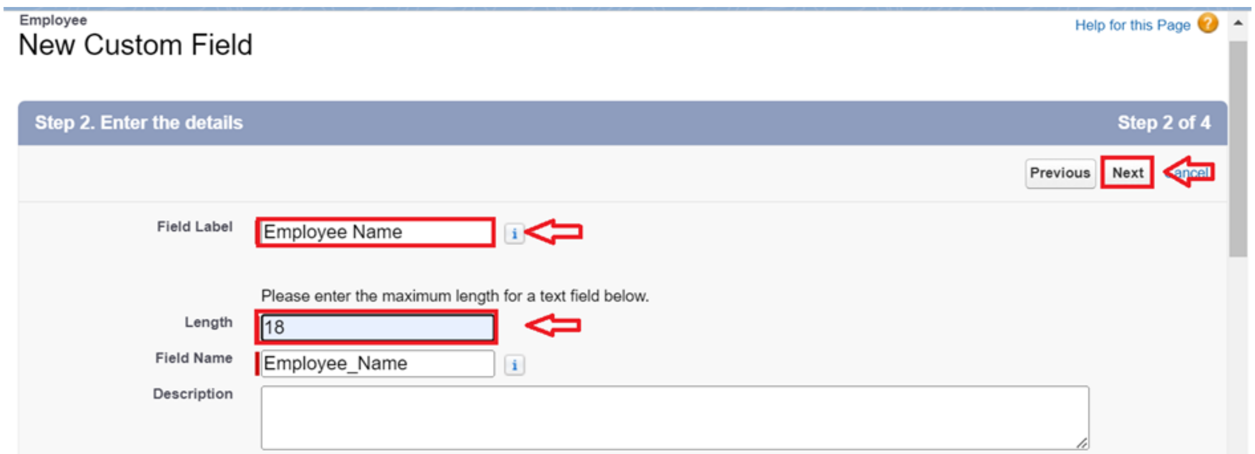
2. Now click on “Fields & Relationships” --> New



3. Select Data type as “Text”.



4. Click on Next



5. Fill the above as following:

1 Field Label: Employee Name

2 Length : 18

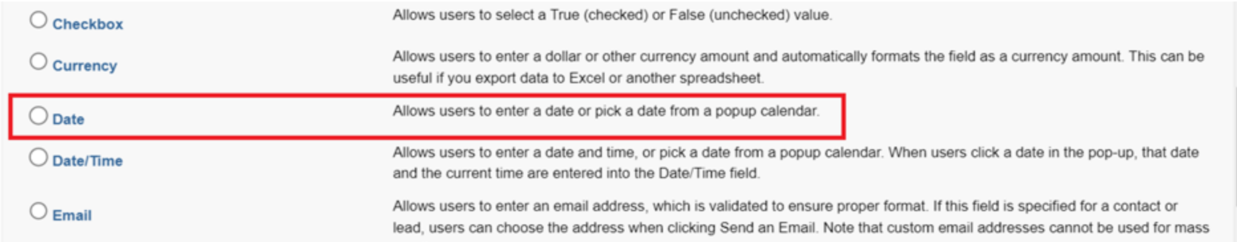
3 Field Name : gets auto generated

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

Activity 2 : Creating Date of Birth Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1

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



3. Click on Next.

4. Fill the above as following:

a. Field Label: Date of Birth.

b. Field Name : gets auto generated.

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

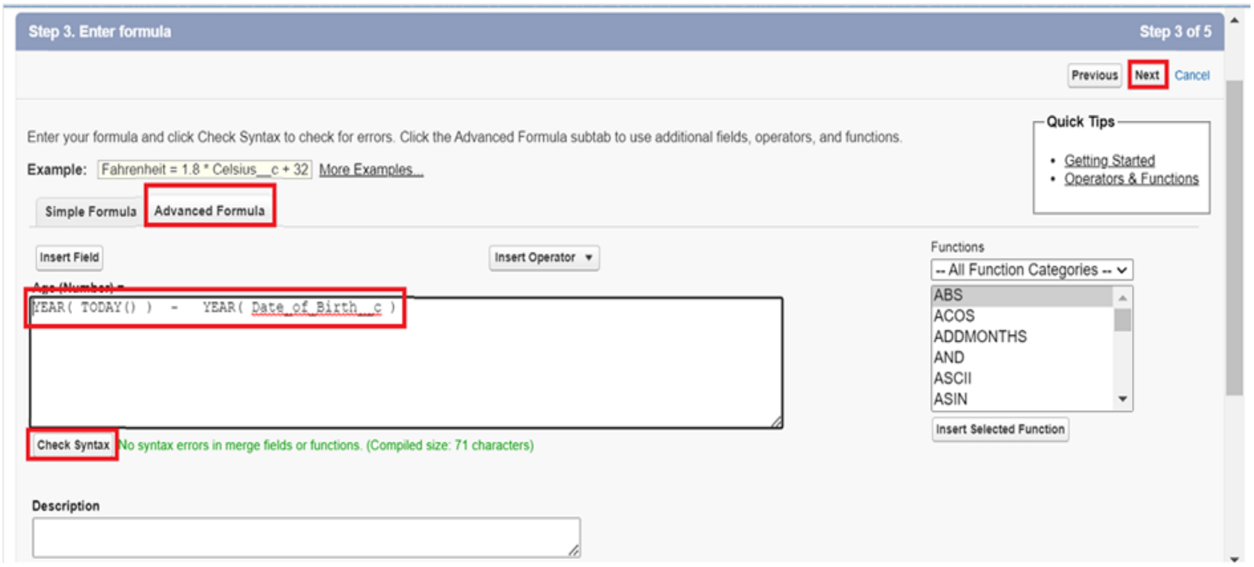
Activity 3 : Creating Formula Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1

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

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

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

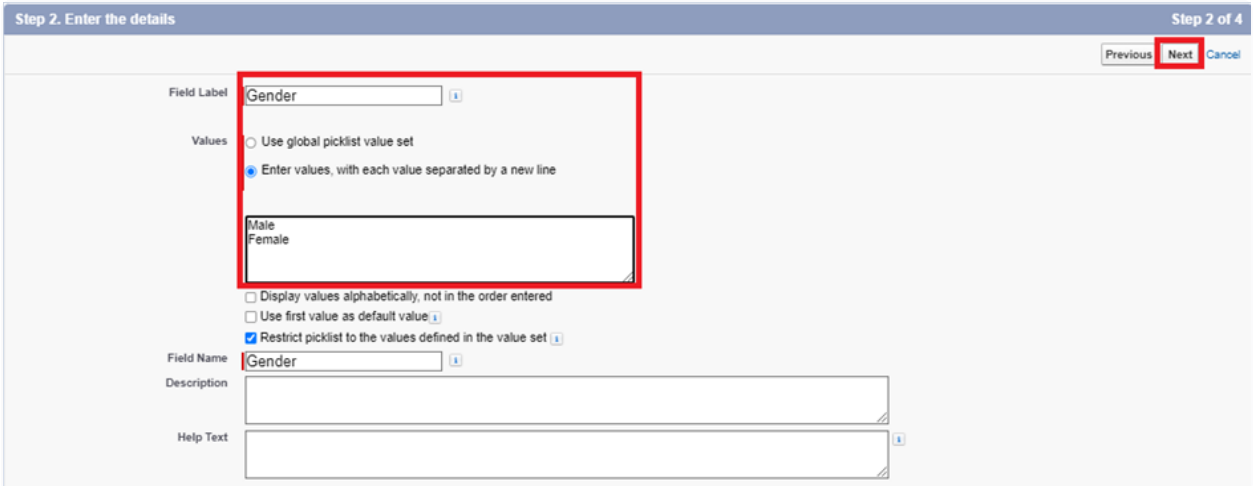


Activity 4 : Creating Picklist Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1

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

3. Enter Field Label as “Gender”, under values select “Enter values, with each value separated by a new line" and enter values as shown below.



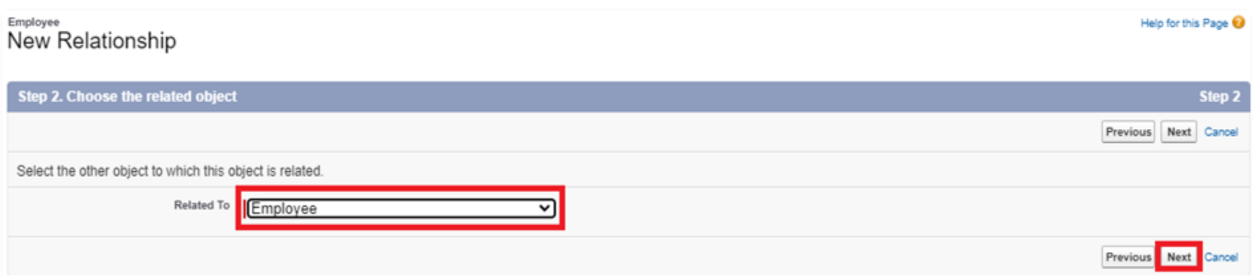
4. Click Next --> Next --> Next --> Save & New.

Activity 5 : Creating Self-Relationship Field in Employee Object

1. Repeat step 1 and 2 mentioned in activity 1

2. Select Data type as "Lookup Relationship" and click Next.

3. Select Employee from the drop down related to the field and click Next.



4. Give Field Label as "Reports to" and click Next.

5. Next --> Next --> Save & New.

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

To Create a Master-Detail relationship

1. Go to the setup page --> click on object manager --> type object name(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.

<table>
<tr><th>Sl No</th><th>Object Name</th><th>Field</th></tr>
<tr><td></td><td></td><td>
<table>
<tr><th>Field Name</th><th>Data type</th></tr>
<tr><td>1 Qualification</td><td>Text</td></tr>
<tr><td>2 Address</td><td>Text Area</td></tr>
<tr><td>3 Experience</td><td>Text Area</td></tr>
</table>
</td></tr>
</table>

1	Employee	4	Phone no	Phone
		5	Email	Email
		6	Joining date	Date
		7	Mode of Work	Picklist: Values
		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 2 Project Lead 3 Start Date 4 End Date 5 Project Status	Text Text Date Date Picklist: Values Completed On Going Not Yet Started

<table>
<tr>
<td>3</td>
<td>Project Task</td>
<td>
<table>
<tr><th>Field Name</th><th>Data type</th></tr>
<tr><td>1 Project Task

2 Finishes in

3 Working Hours

4 Employee Name</td><td>MDR with project object

Formula : (Project_Task__r.Start_Date__c - Project_Task__r.End_Date__c) Formula return type: Number

Numbers

Master Detail relationship with Employee object</td></tr>
</table>
Note: here in Finishes in field, Start Date and End Date belong to Employee Object.
</td>
</tr>
</table>

<table>
<tr>
<td>4</td>
<td>Asset Service</td>
<td>
<table>
<tr><th>Field Name</th><th>Data type</th></tr>
</table>
</td>
</tr>
</table>

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

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

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

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

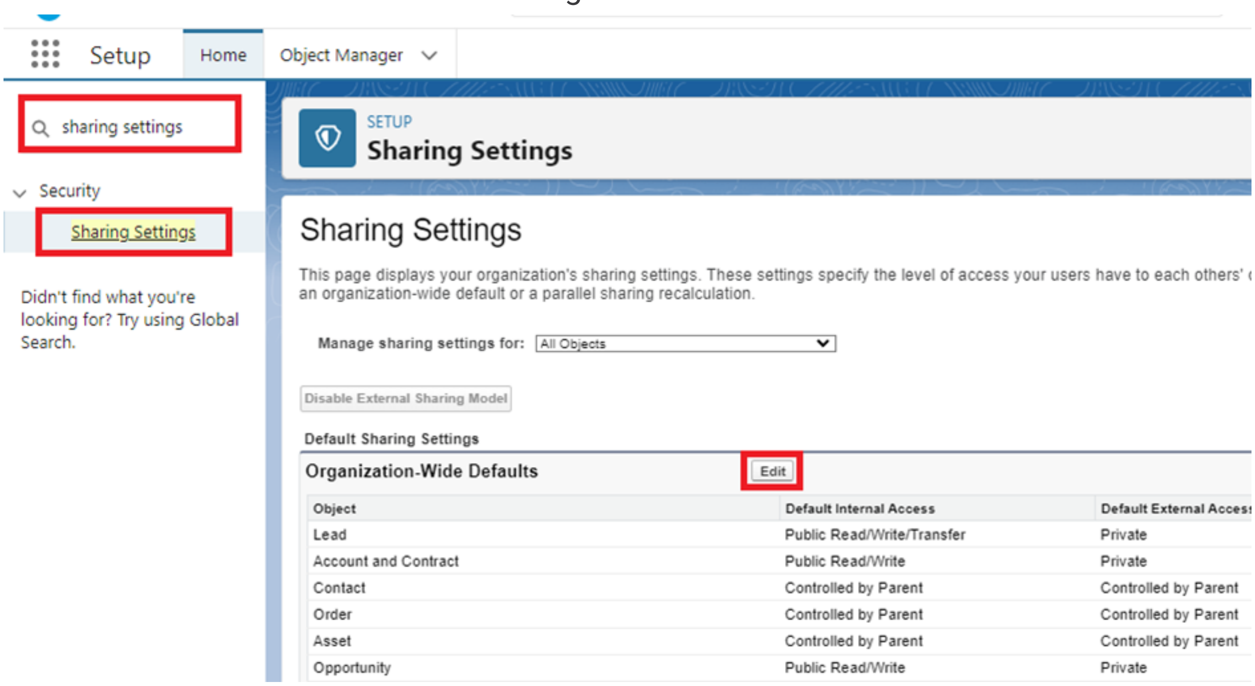
Use Case

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.

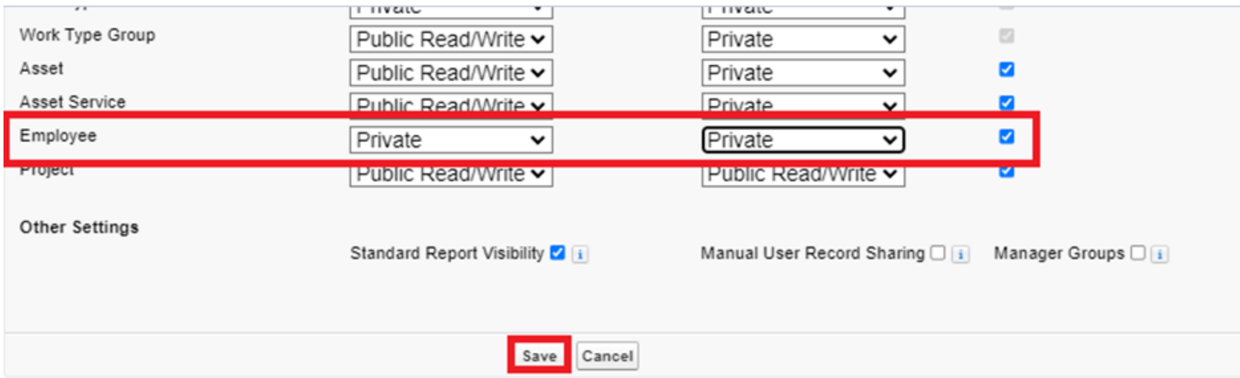
2. Click Edit in the Organization-Wide Defaults area.



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.



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

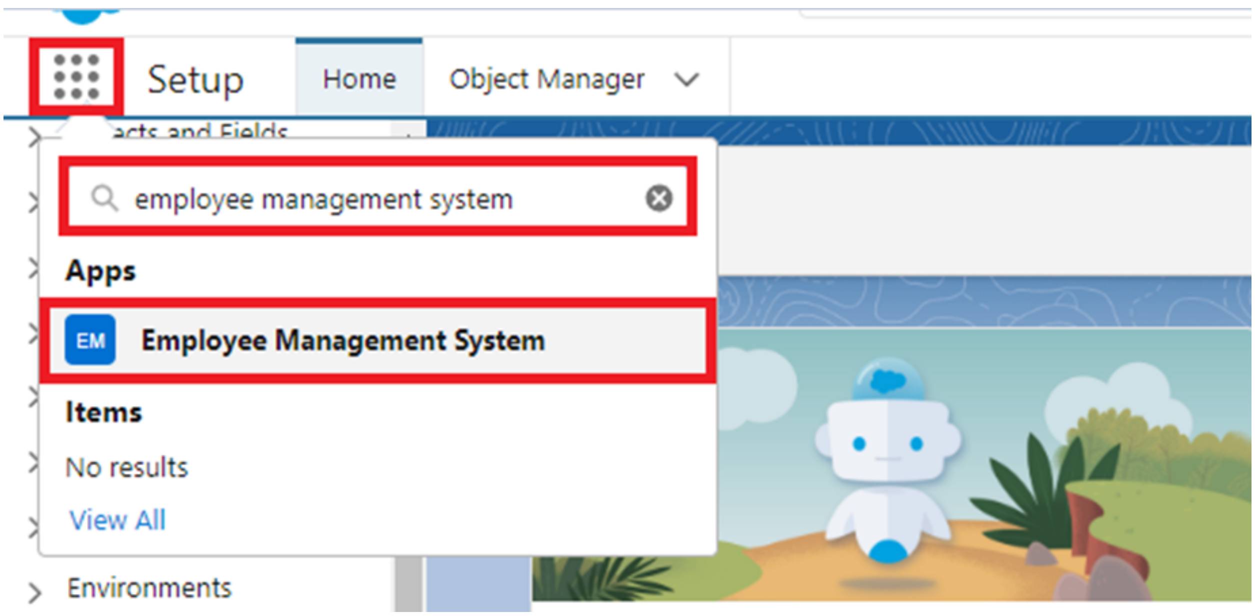
Use Case:

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)

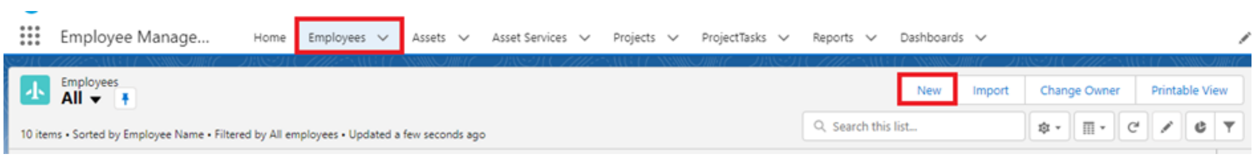
1. Click on App Launcher on the left side of the screen.

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.

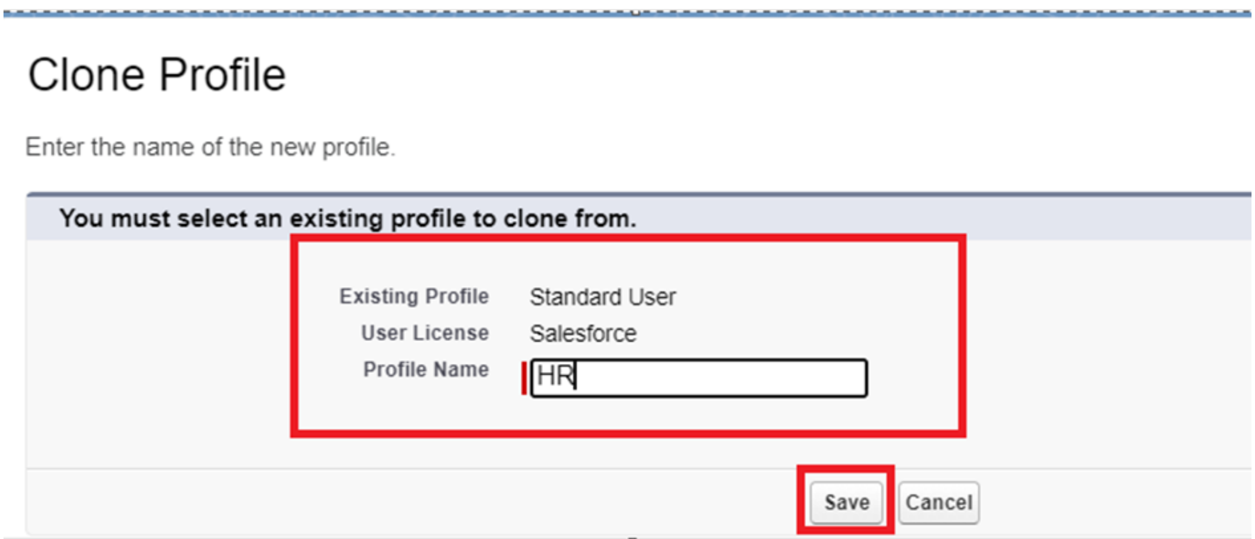
Use Case

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

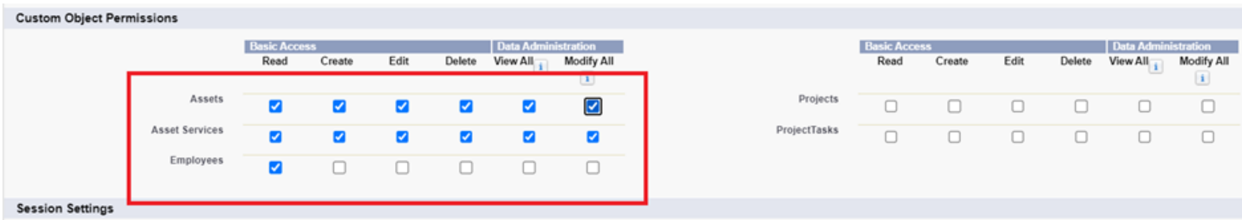
To create a new profile:

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



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.



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

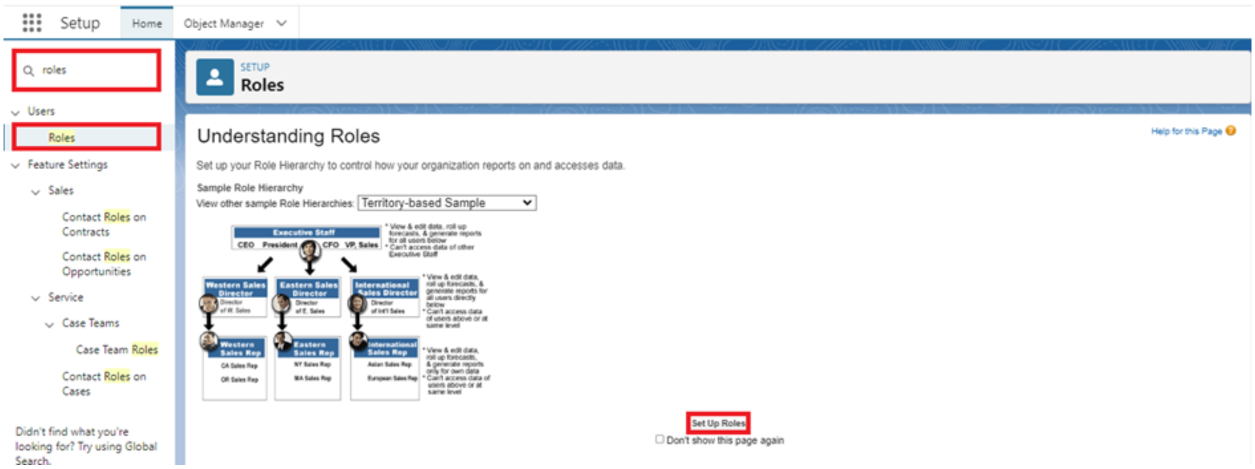
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Use Case

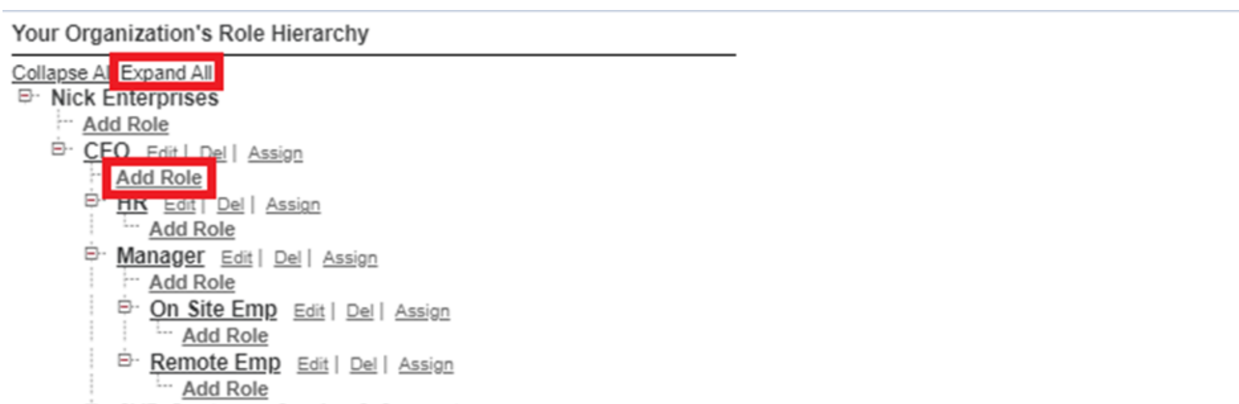
You have successfully fulfilled the 1st requirement i.e., differentiating the users based on the functionality. Now comes the 2nd task of differentiating the users based on their position, using your excellent admin skills and expanding the custom roles for the organization and assigning it to the users.

Activity 1: Creating HR Role

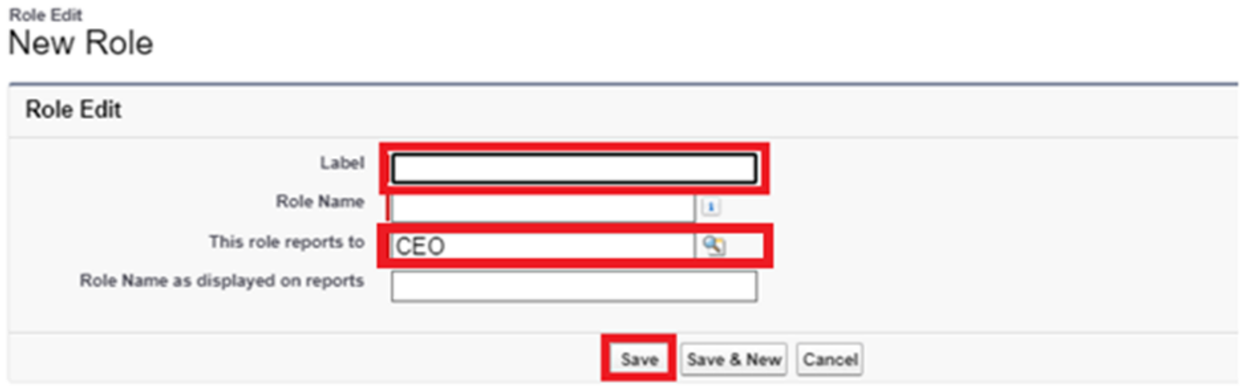
1. Go to quick find --> Search for Roles --> click on set up roles.



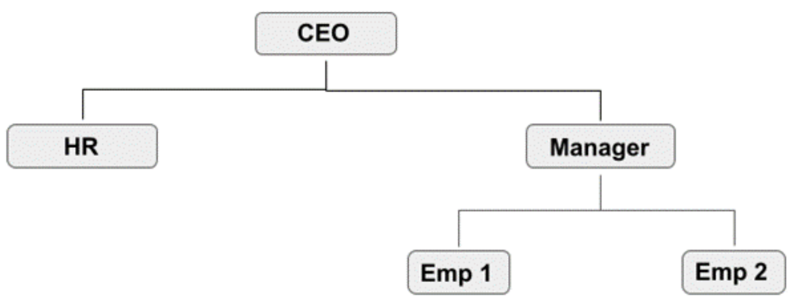
2. Click on Expand All and click on add role under whom this role works.



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



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

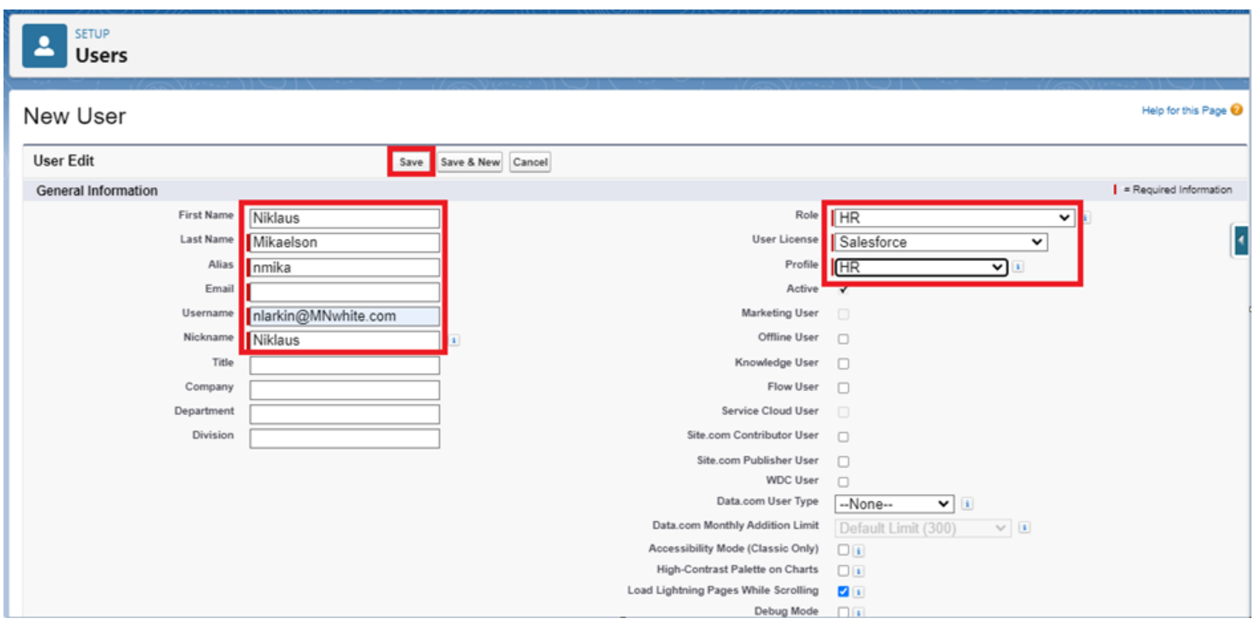
TheSmartBridge is all set to move with the Salesforce platform. As this platform is very new to the employees in the organization it’s up to you to enlight every employee in it.

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



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.

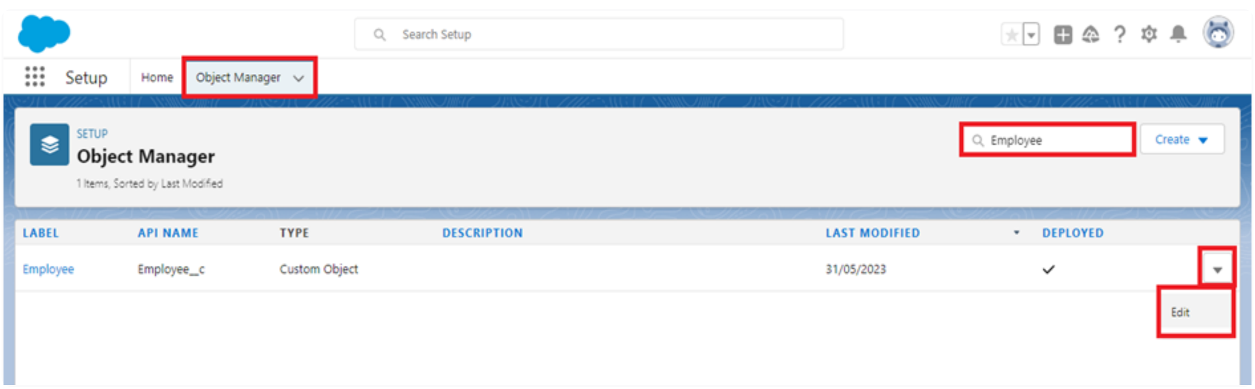
Use Case

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.

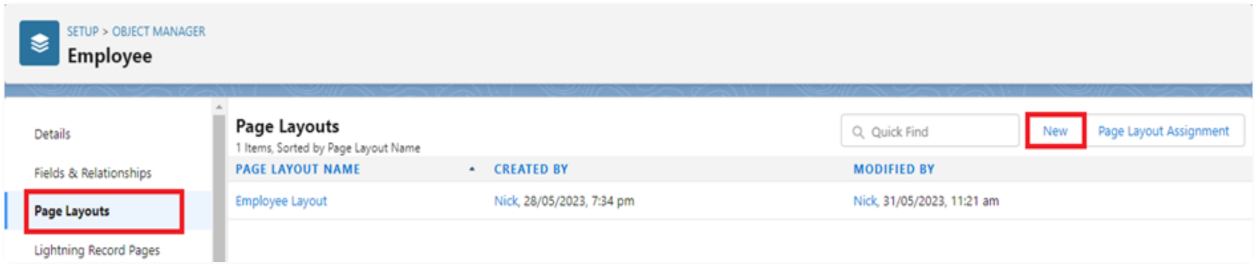
Activity 1 : creating a page layout for Employee object

To Create a Page layout:

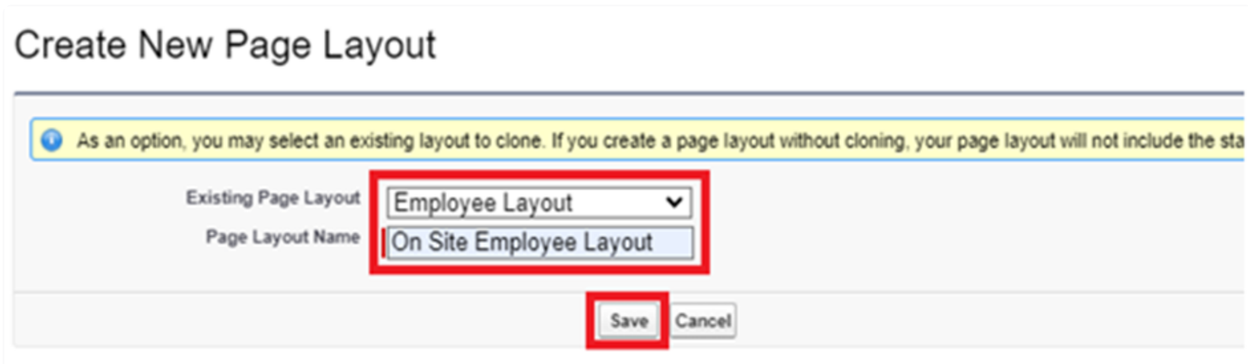
1. Go to Setup --> Click on Object Manager --> Search for the object (Employee) --> From drop down click on Edit.



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



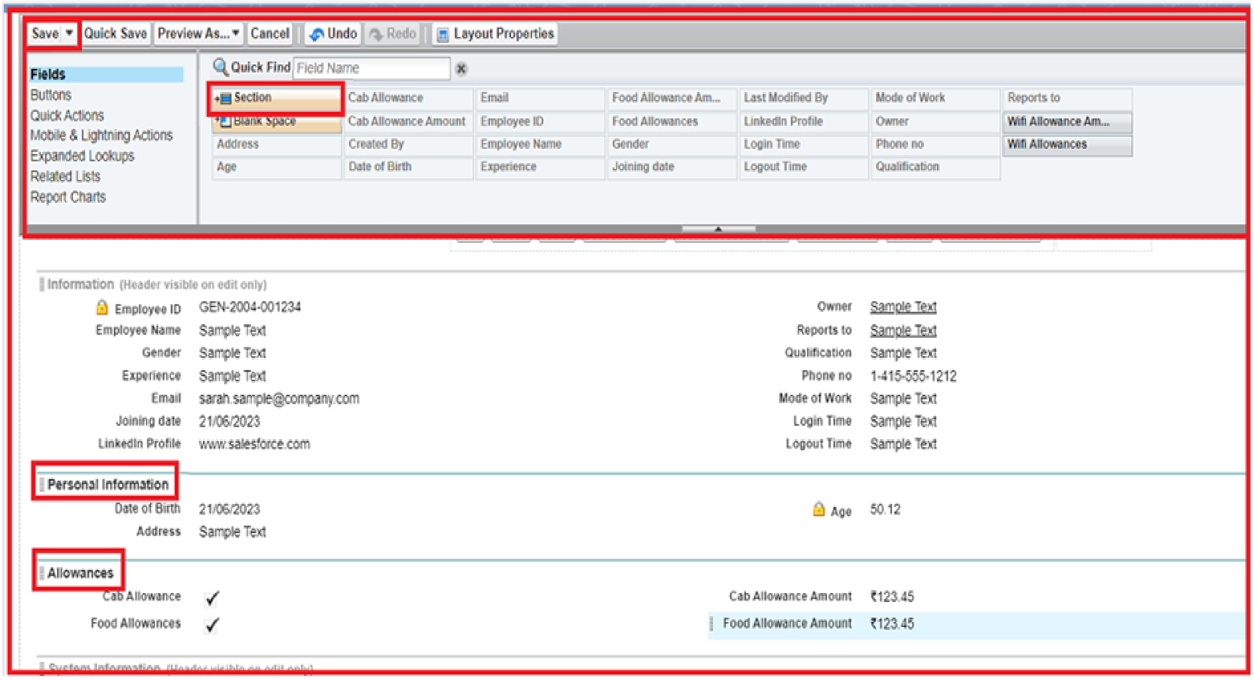
3. Give Page layout Name as "On Site Employee Layout" and click on Save.



4. Drag and drop the Section from the highlight panel below the Information 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.



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

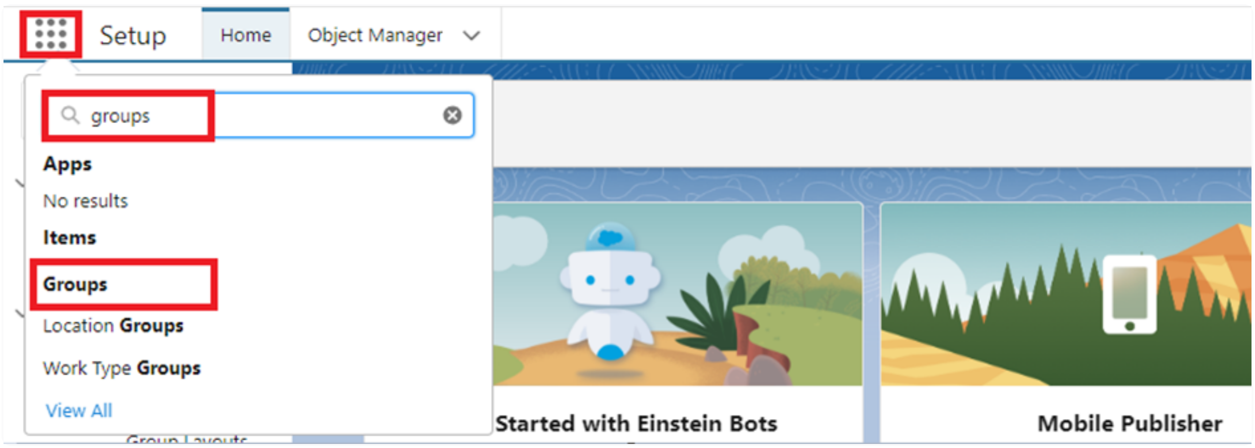
Founder of the organization and Jai Prakash The COO are very impressed with your work. But still there are some updates which your COO wants in your organization. So he comes to you with the idea that all the employees should have a common group for work discussion inside the salesforce. You know how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

Activity 1 : Creating a chatter group for your organization.

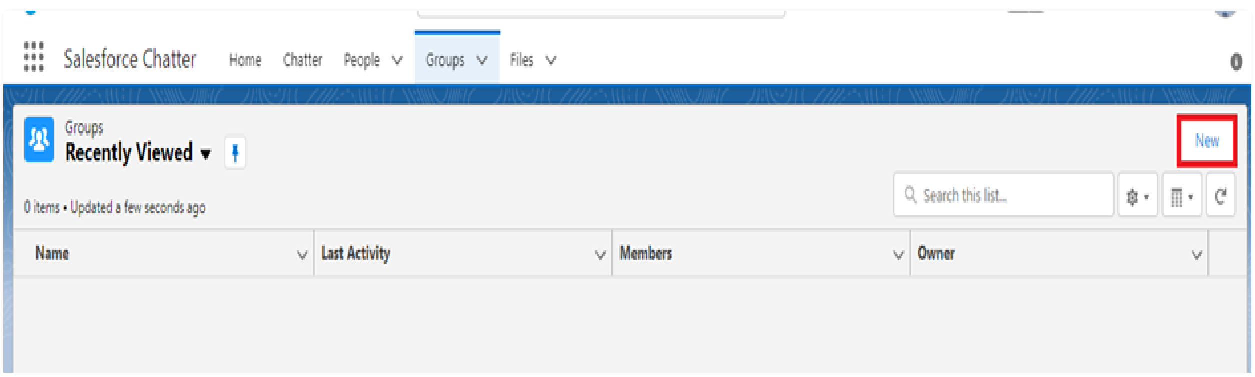
To Create a chatter group:

1. Click the App Launcher.

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

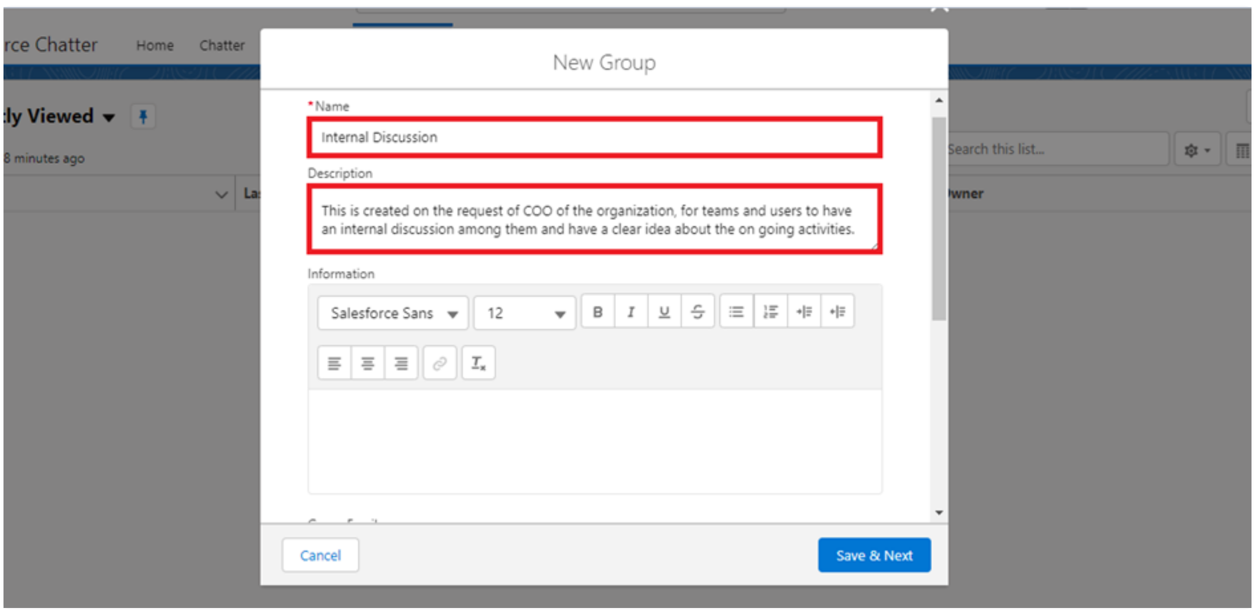


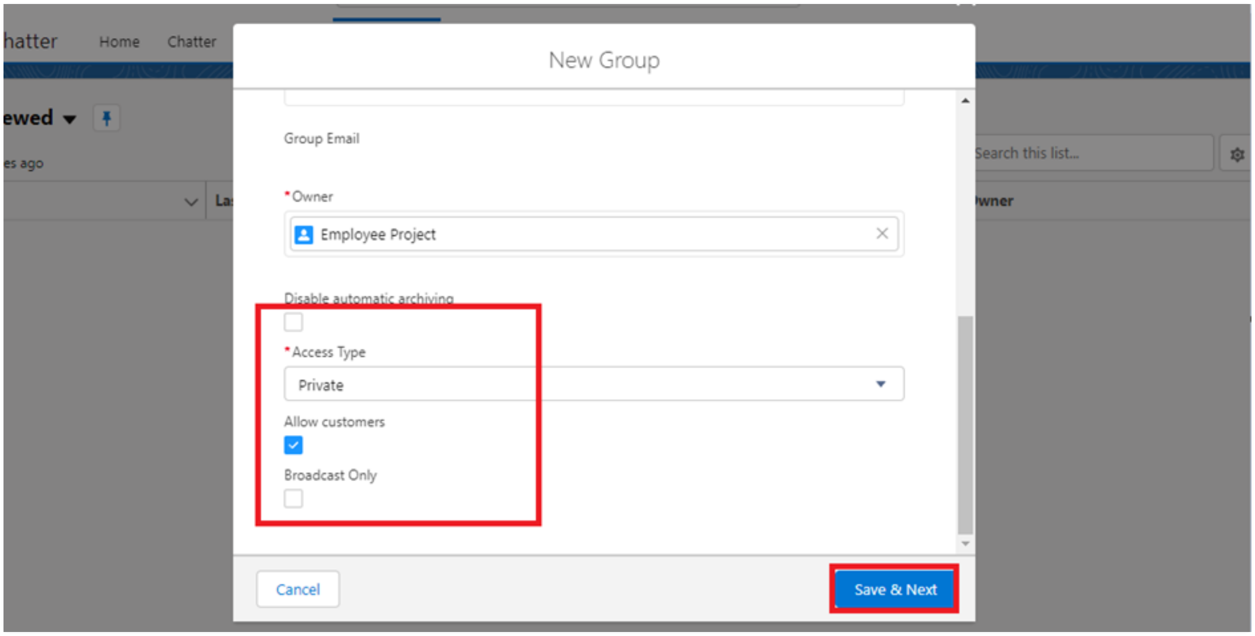
3. Click New.



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

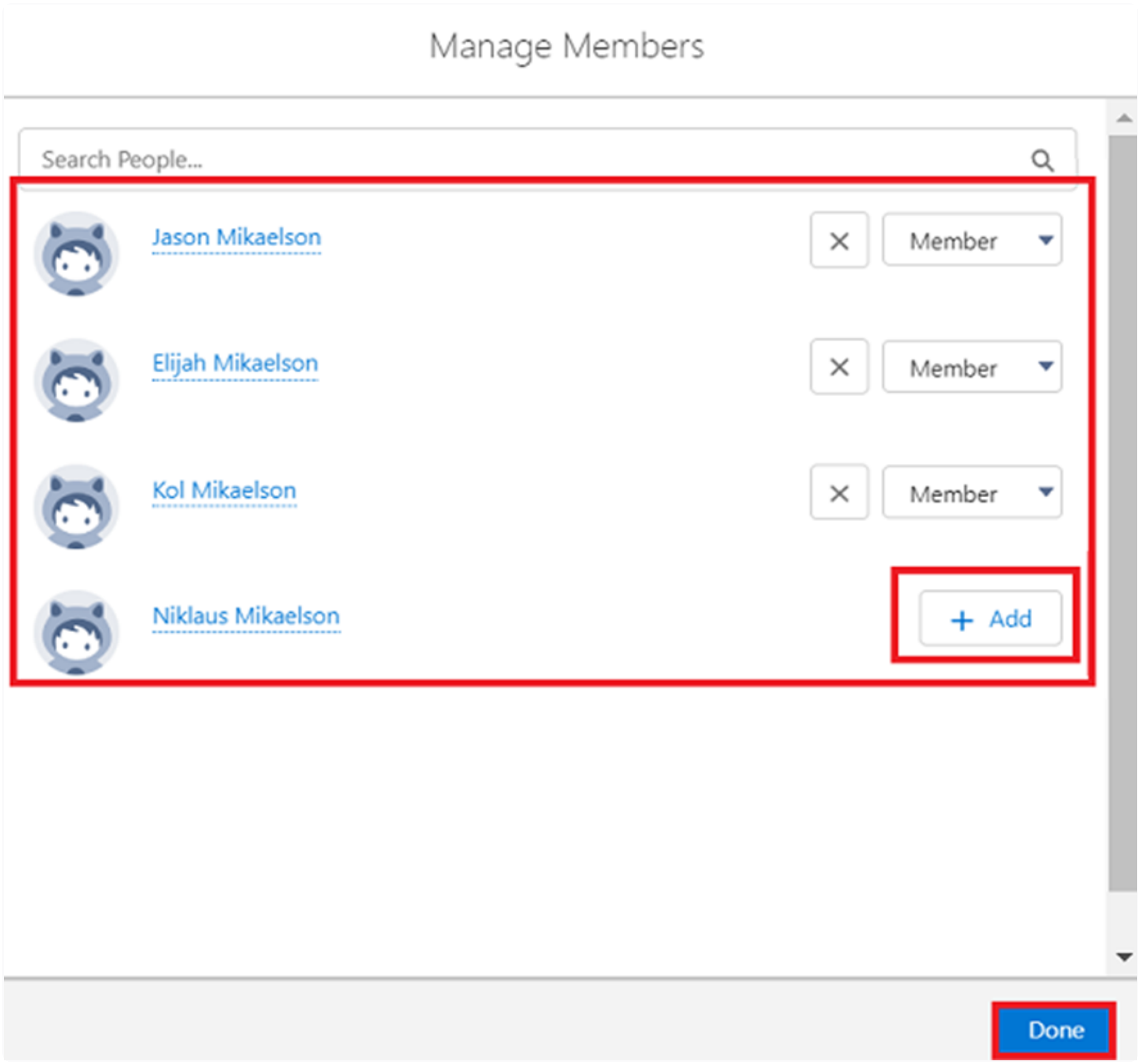
Field	Value
1 Group Name 2 Description 3 Access Type 4 Allow Customers	Internal Discussion Give a understanding Description on your own Private Checked



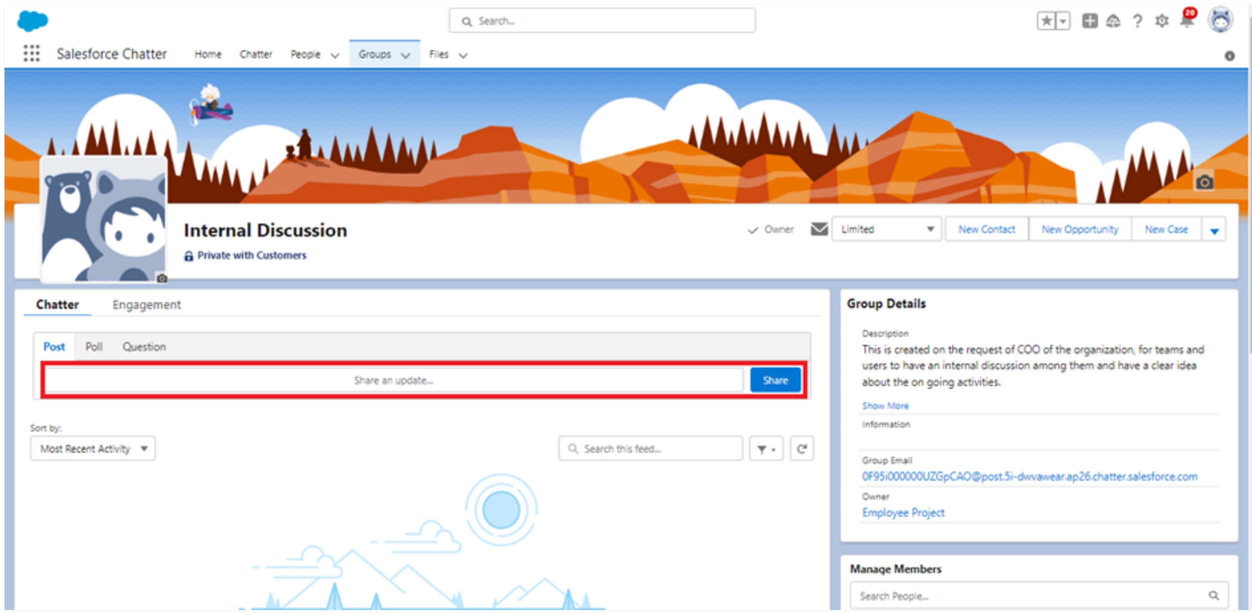


5. Click Save & Next. Skip the Upload Picture section and click Next.

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


Manage Members
Search People...
Jason Mikaelson
Member
Elijah Mikaelson
Member
Kol Mikaelson
Member
Niklaus Mikaelson
Add
Done

7. Click Done.



8. This is how your group interface looks like.

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

10. Click Share.
    Note: You can like or comment on this post.

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.

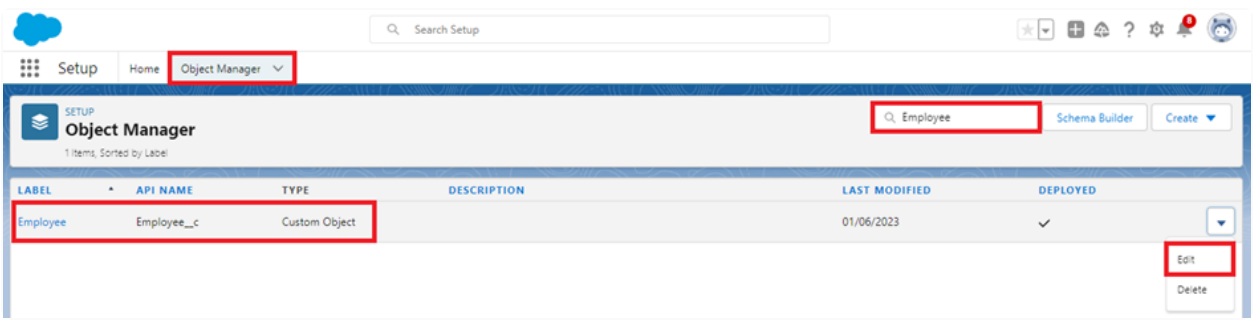
Use Case

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.

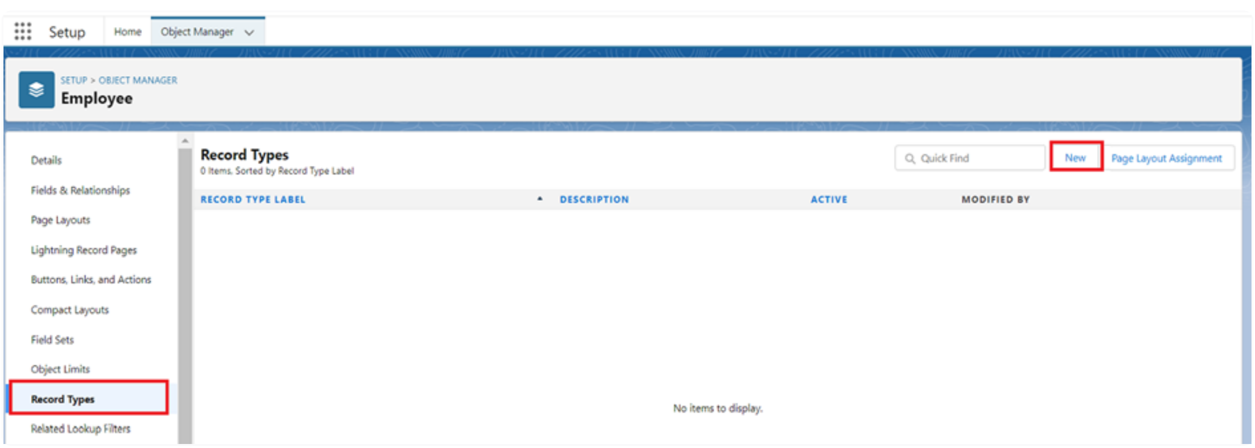
Activity 1: Creating On Site Employee Record Type

To create a Record Type:

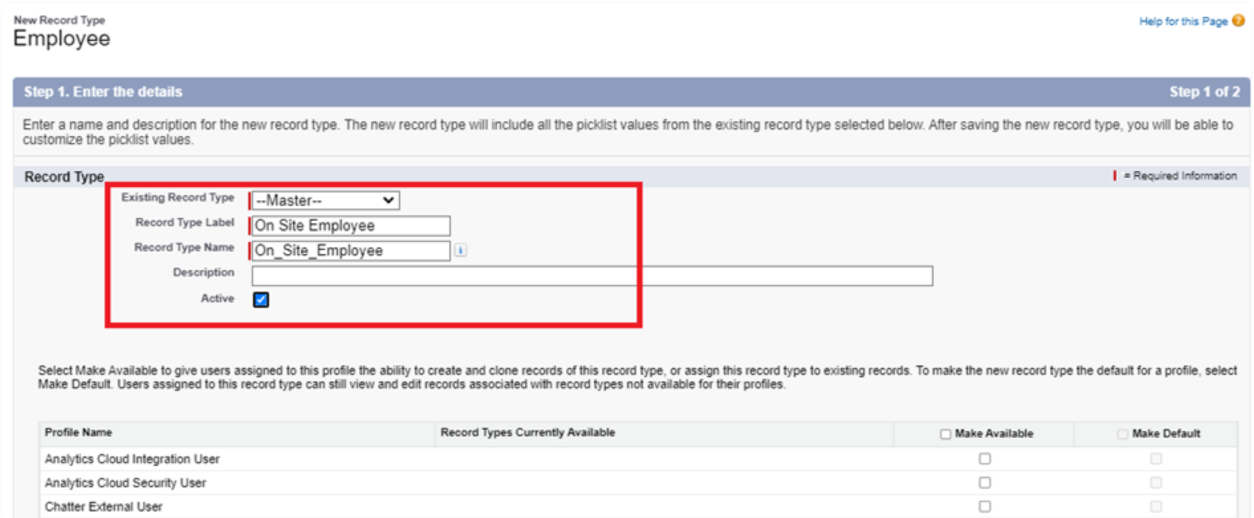
1. Go to Setup --> click on Object Manager --> Search for the object (Employee) --> from drop down click Edit.



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

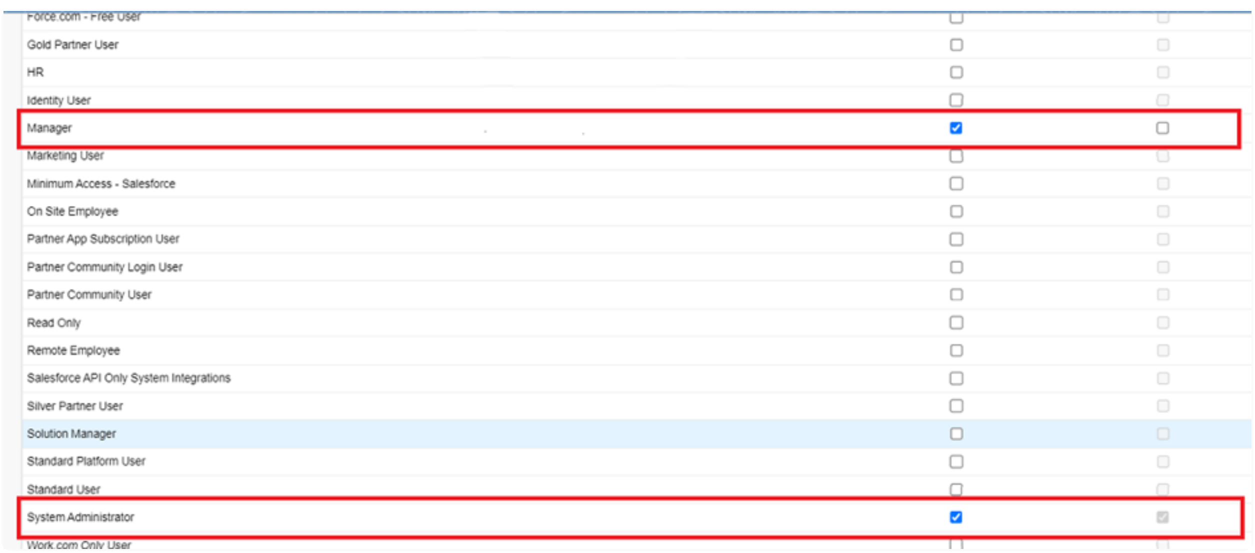


3. Give Record Type Label as "On Site Employee" and make it active.

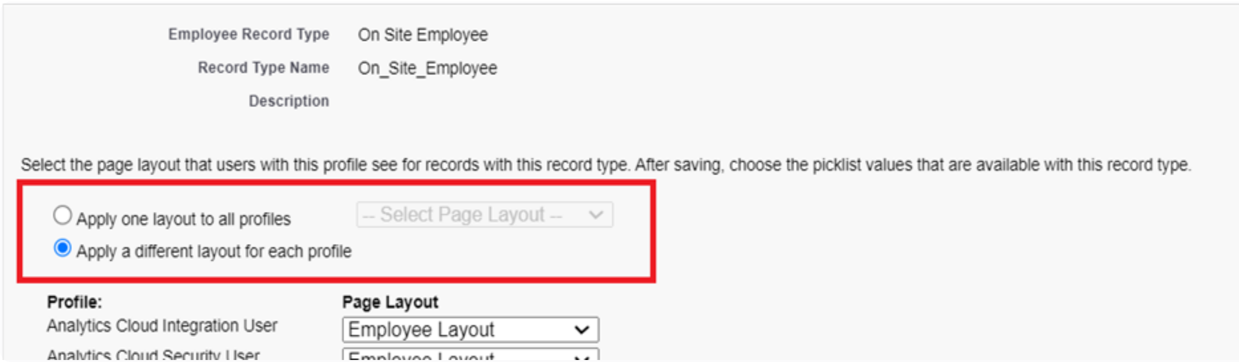


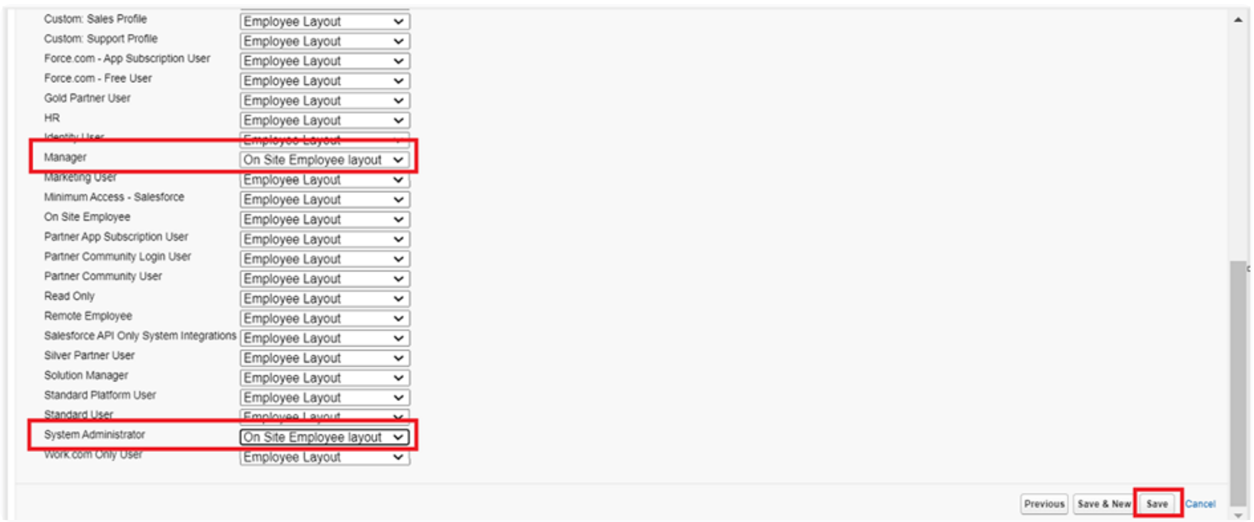
4. Uncheck for “Make Available”.

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



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





7. click Save.

Activity 2: Creating "Remote Employee" Record Type

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

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

Permission sets

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

Use Case

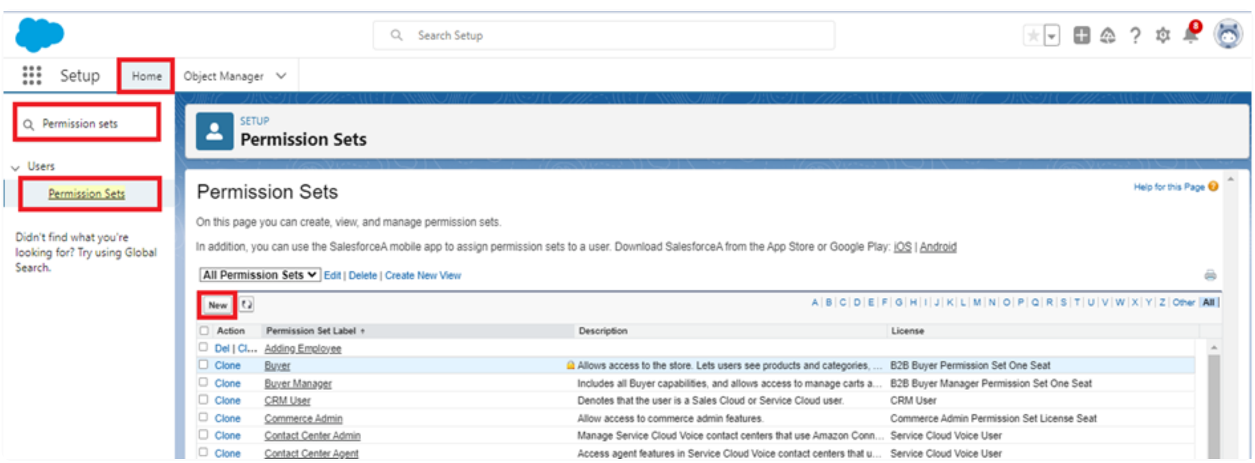
Every day is a war for Admin with some unique challenges. A new challenge awaits as you enter the office. After you arrive in office you came to know that the manger is on leave and there's a lot work pending at his desk generally there are numbers of employee records that the manager have to enter in 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.

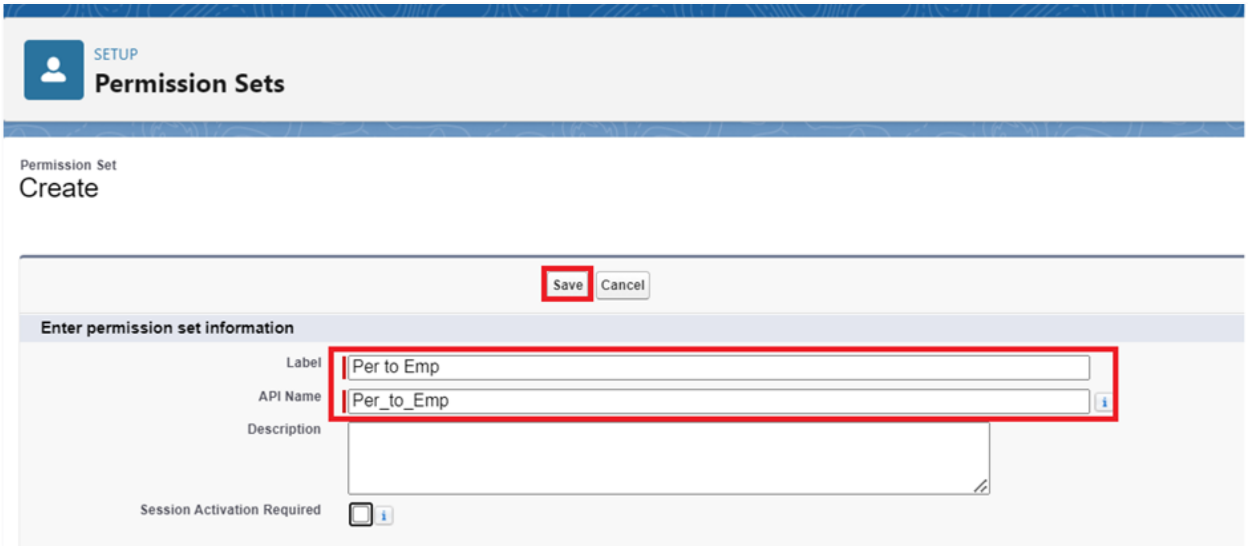
Activity 1: Creating a permission set

To Create a Permission Set:

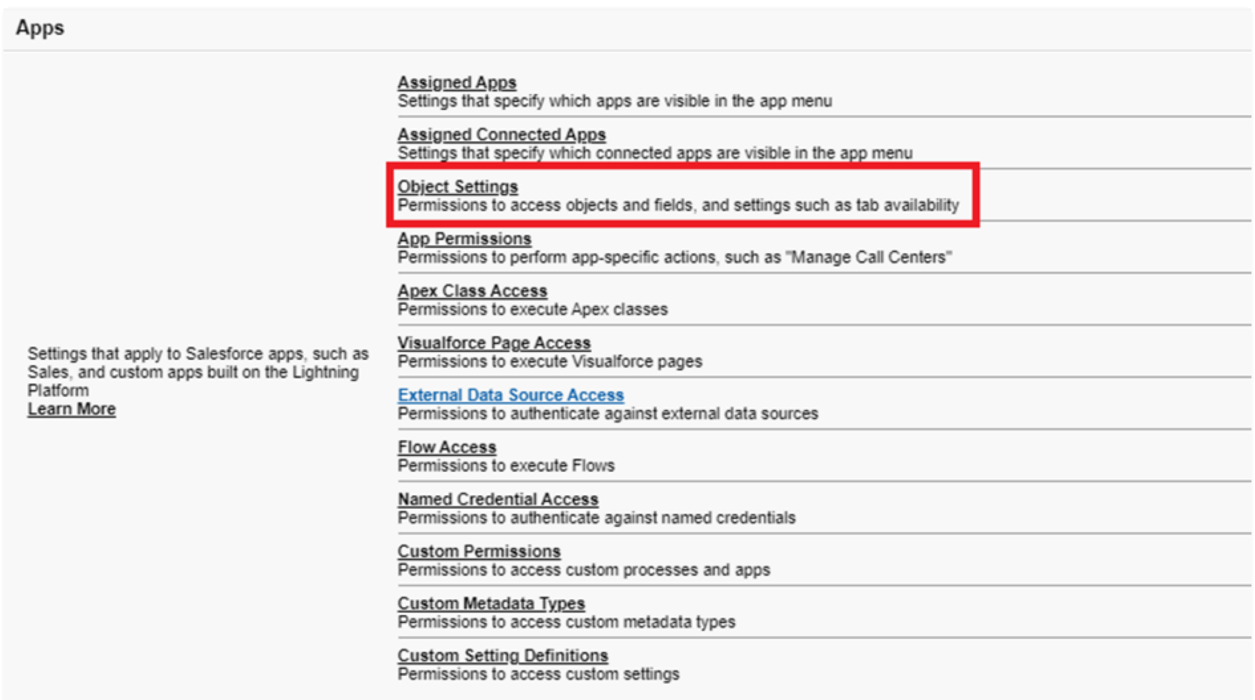
1. Go to setup --> type "permission sets" in quick search --> select permission sets --> New.



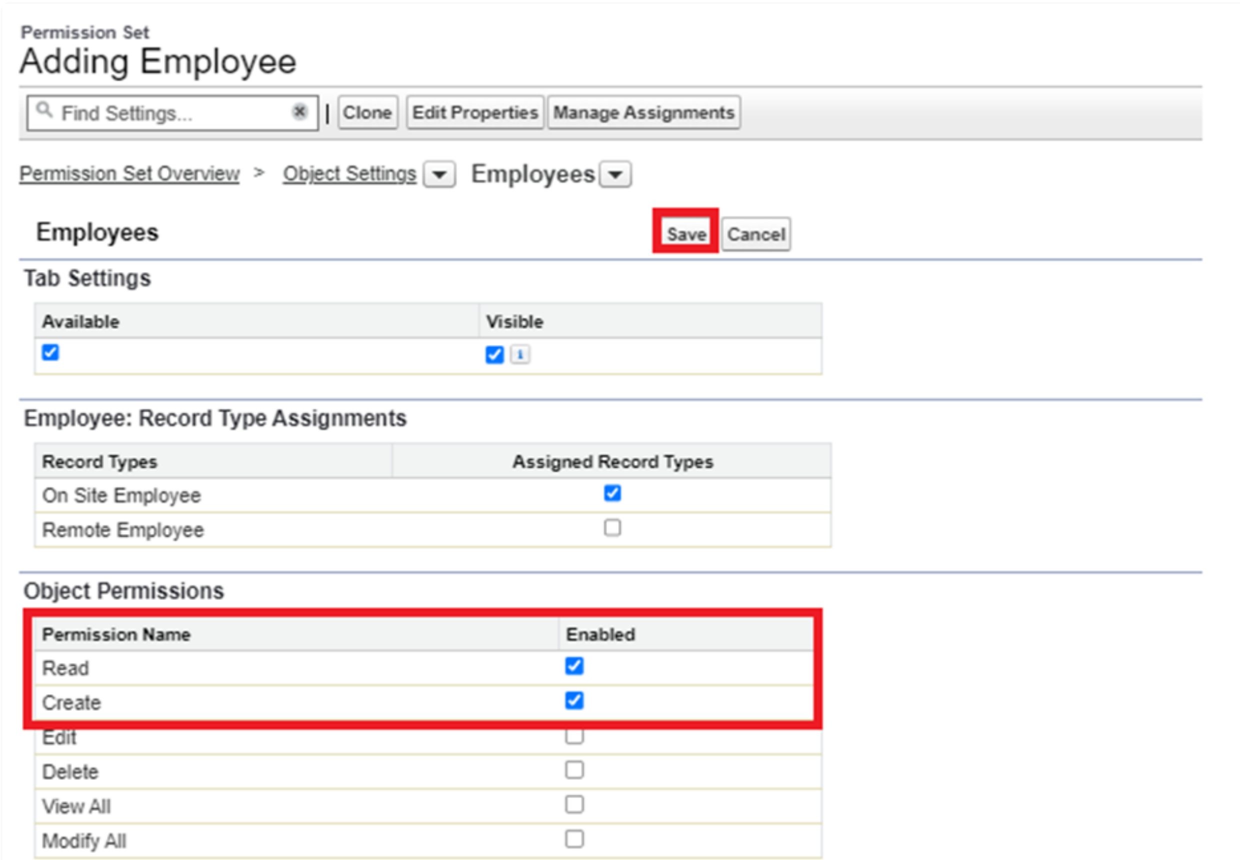
2. Enter the label name as "Per to Emp" --> Save.



3. Under Apps Select object settings.

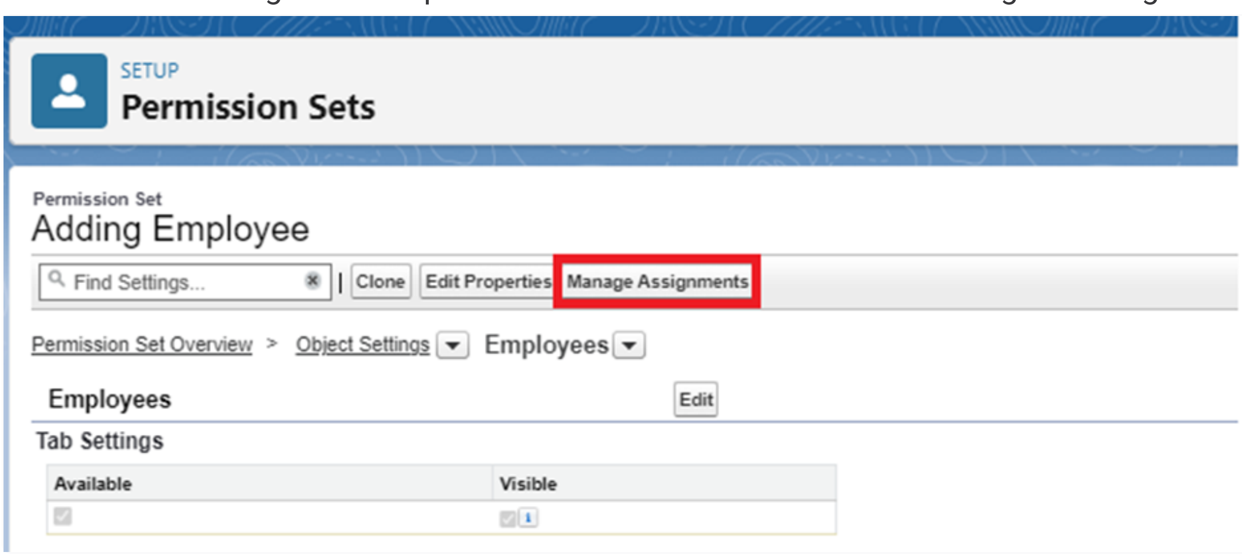


4. Click on Employee object --> click on Edit --> under object permission check for read and create.

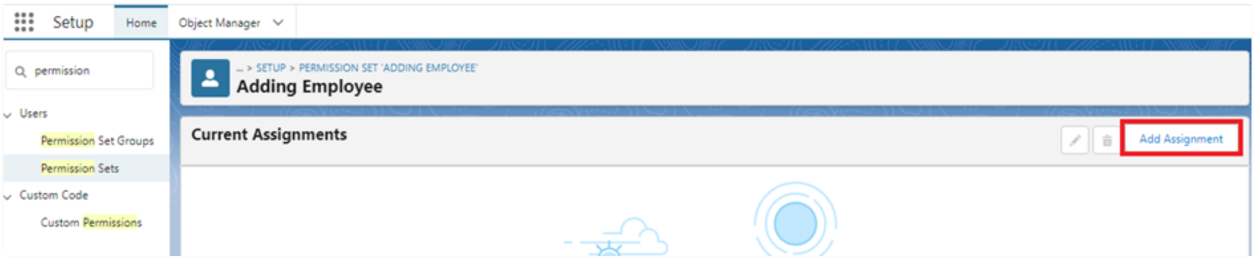


5. Click on Save.

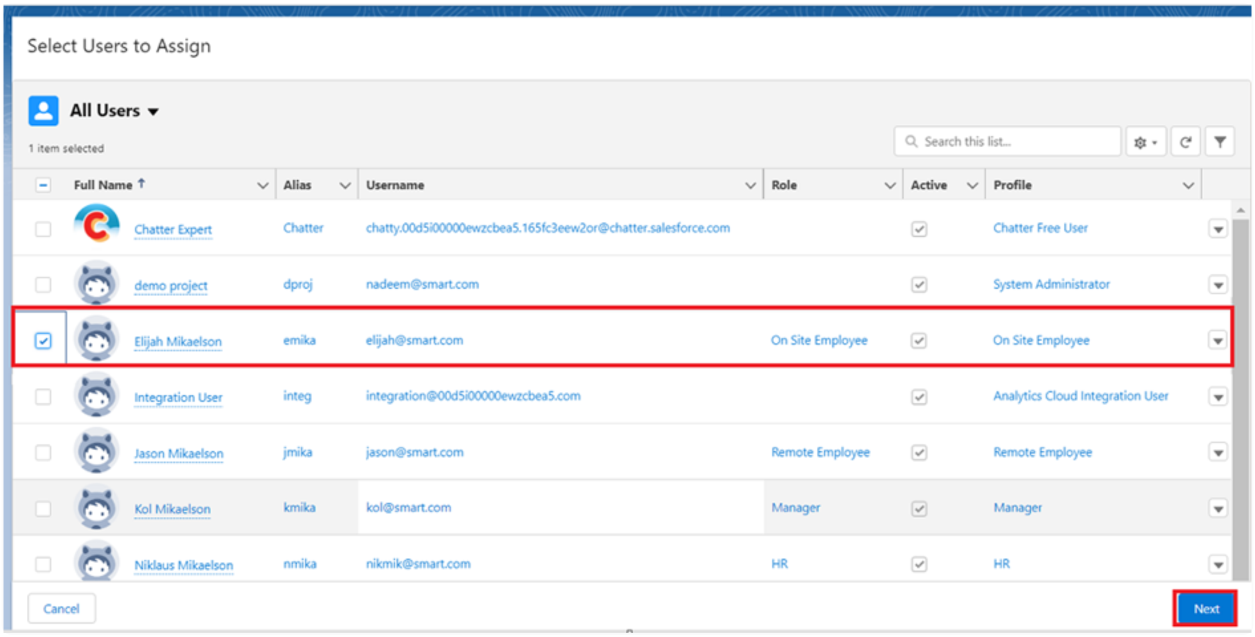
6. After saving the permission click on the Manage assignment



7. Now click on the Manage Assignment.



8. Click on Add Assignment.



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

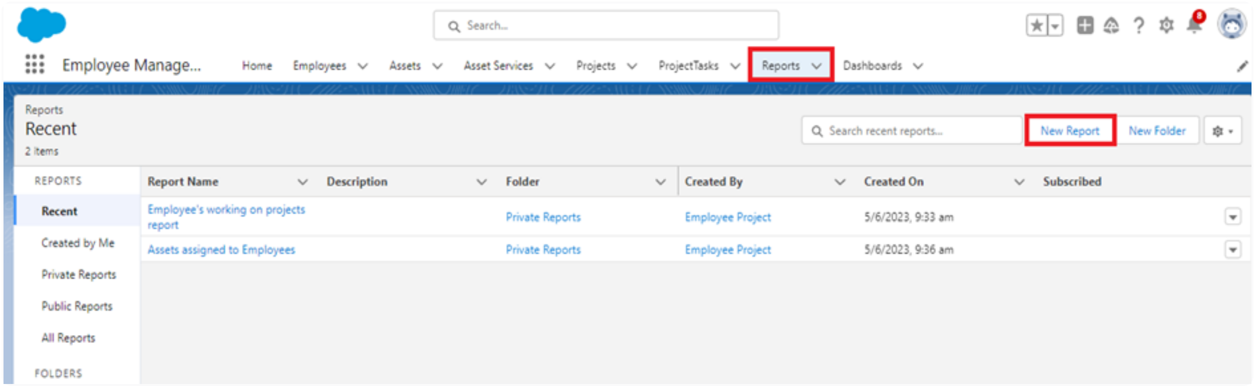
Let’s create a Report.

Activity 1: Create Report

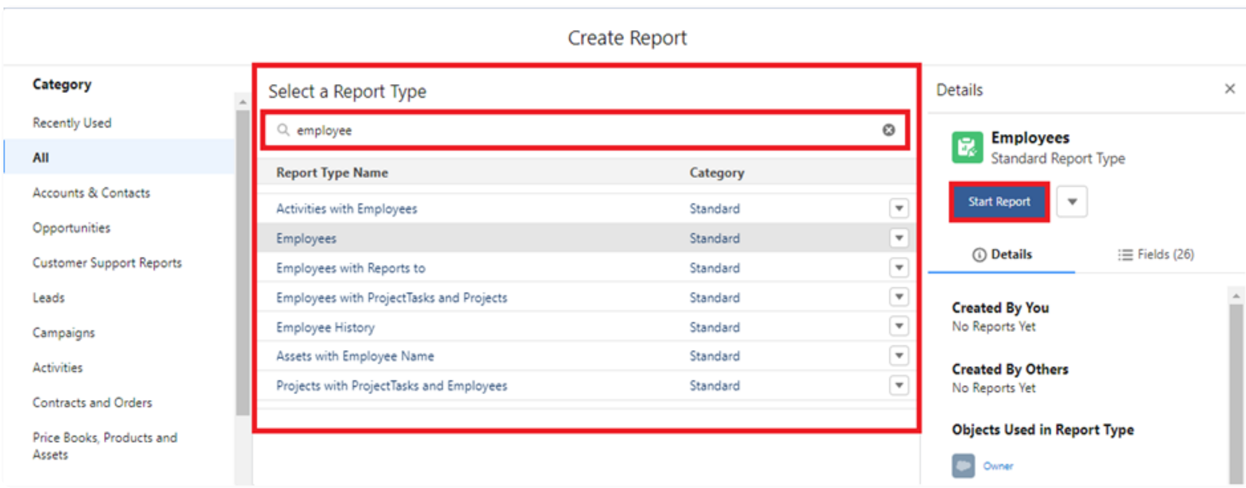
To Create a Report:

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

2. Click New Report.

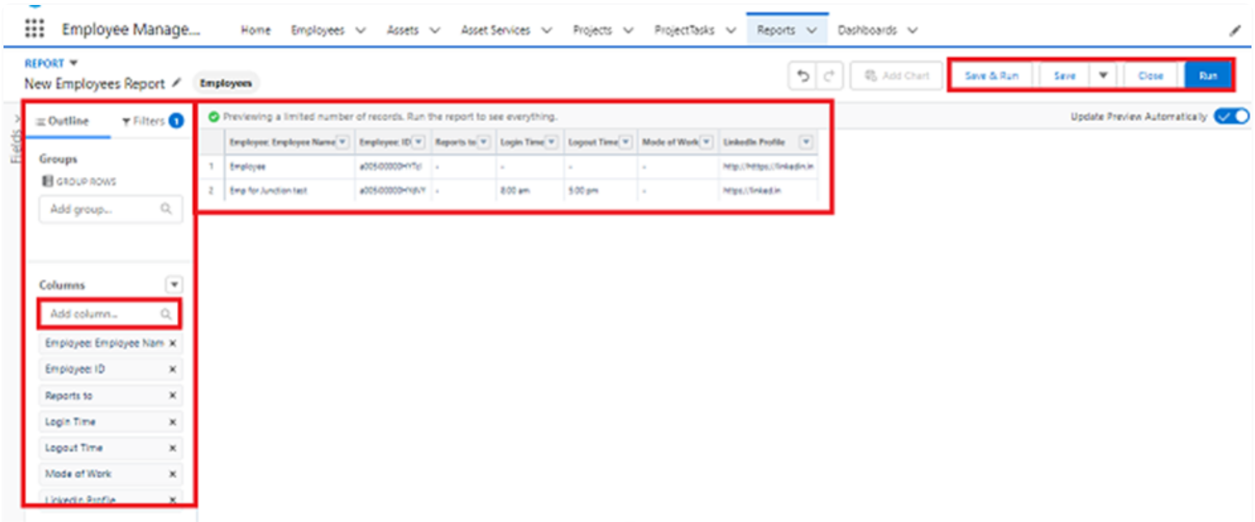


3. Select report type from category or from report type panel or from search panel --> click on start report.



4. Customize your report

--> Add fields from left pane as shown below



5. Save or run it.

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

Activity 2: Create 2 more Report

1. Create a report with report type: “Employees with ProjectTasks and Projects”.

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

Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you’ve gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

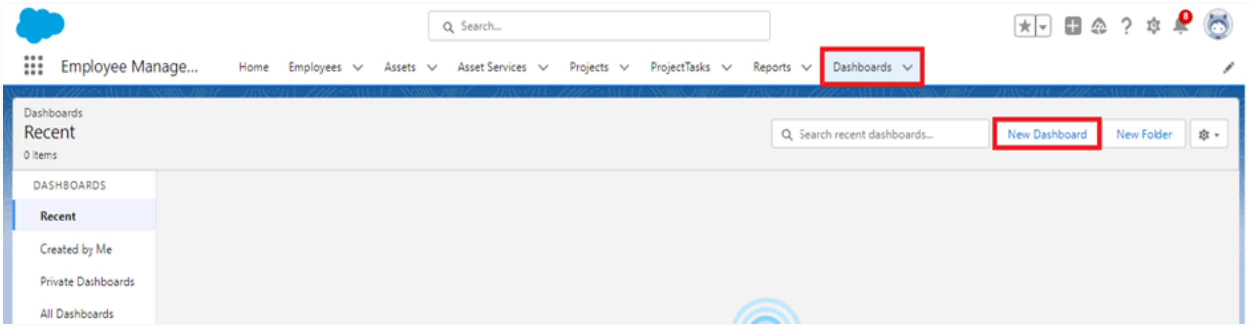
Use Case

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.

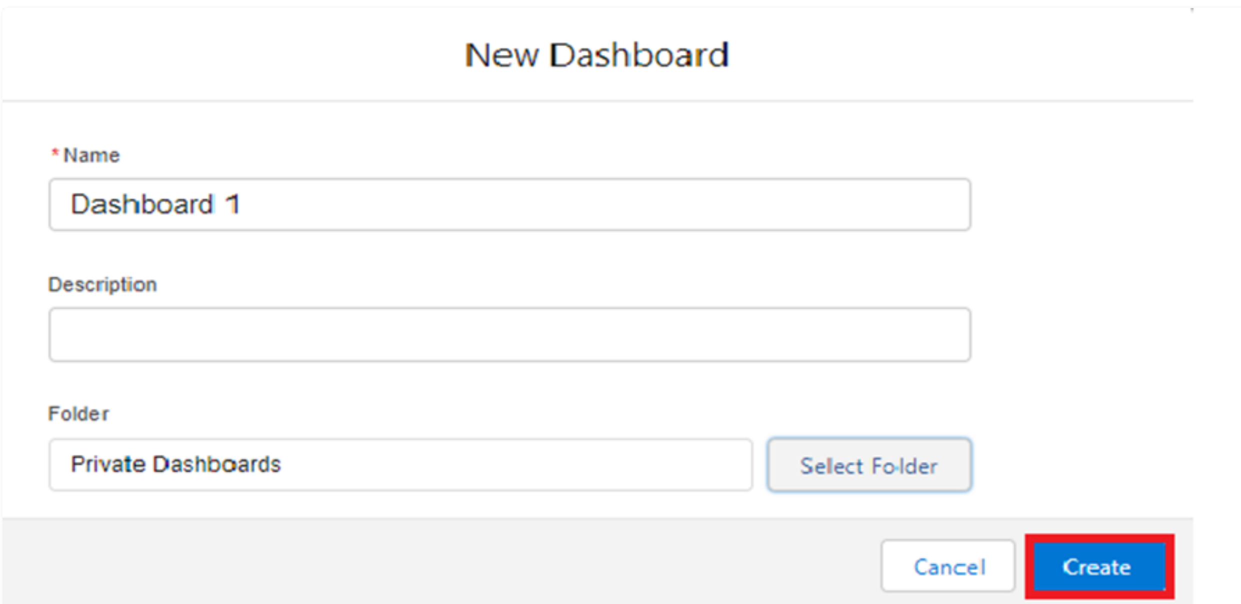
Activity 1: Create Dashboard

To Create a Dashboard

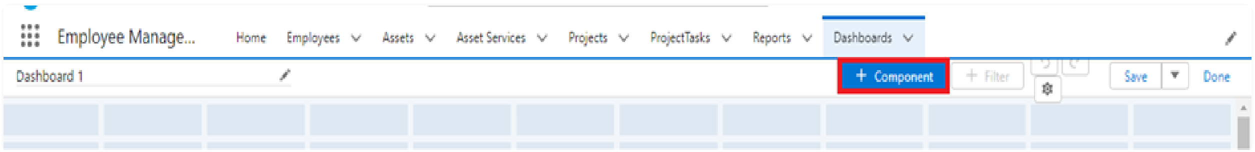
1. Go to the app --> click on the Dashboards tabs.



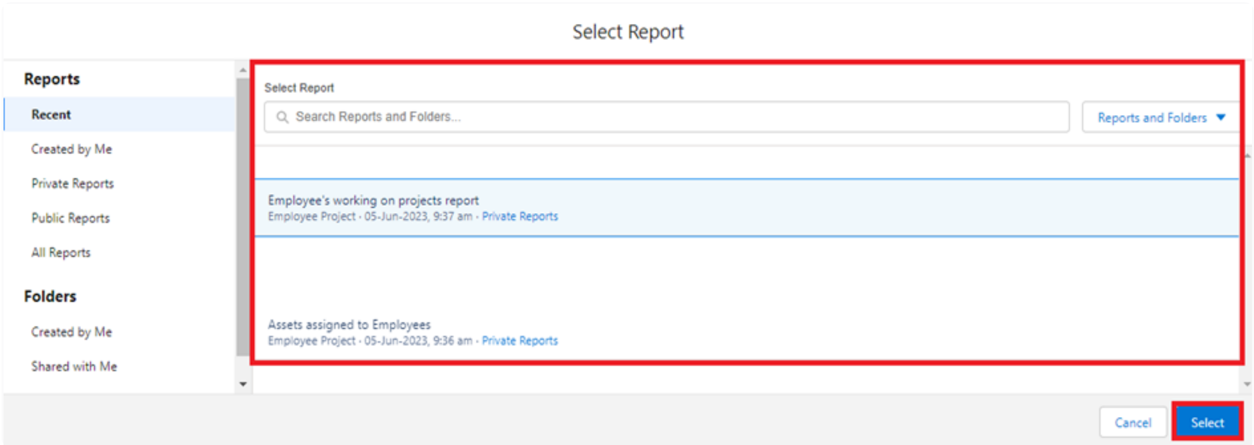
2. Give a Name and click on Create.



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:

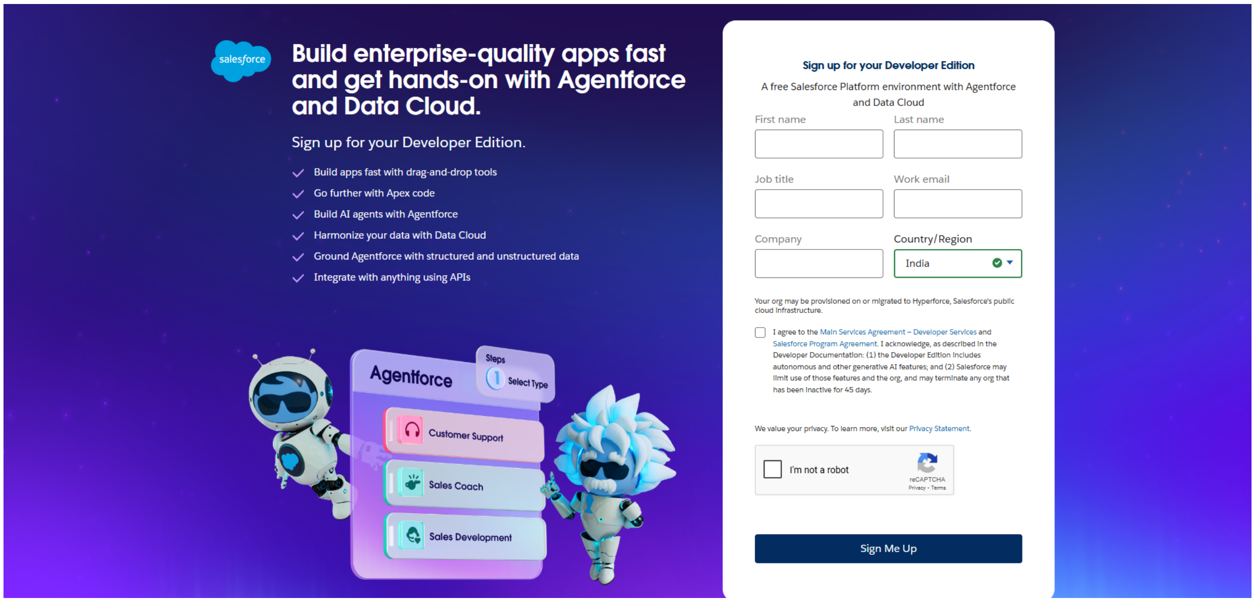
Create another Dashboard as we discussed in activity 1.

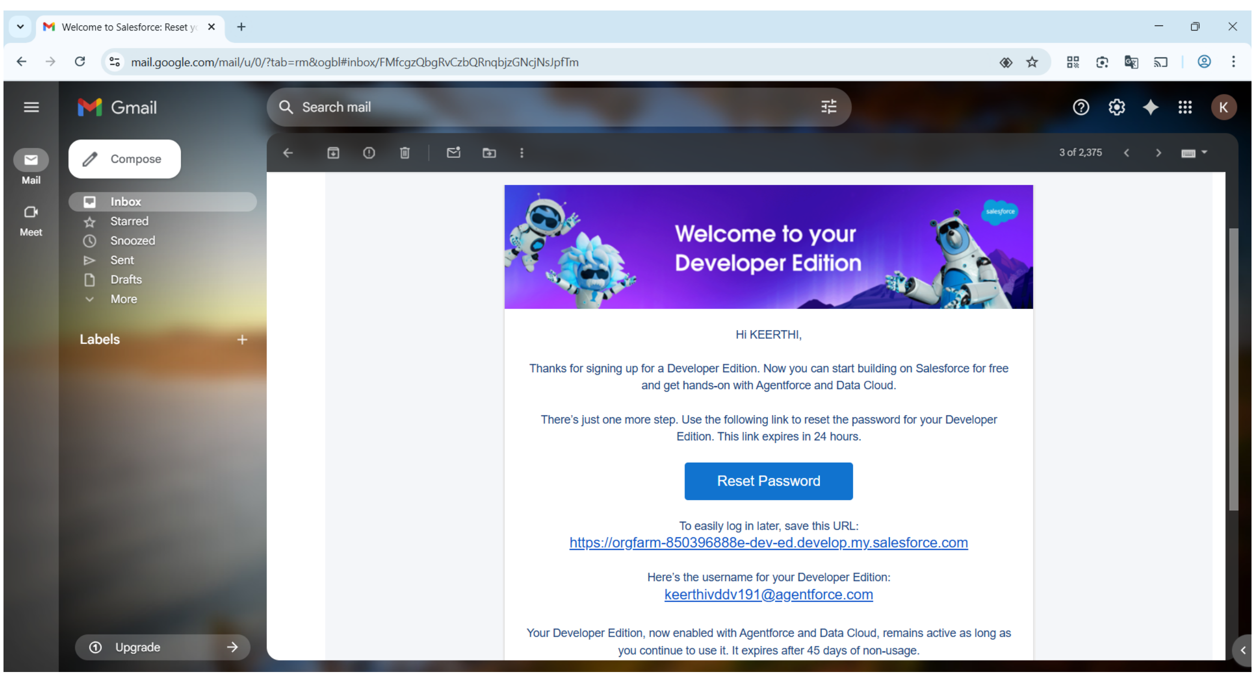
Conclusion

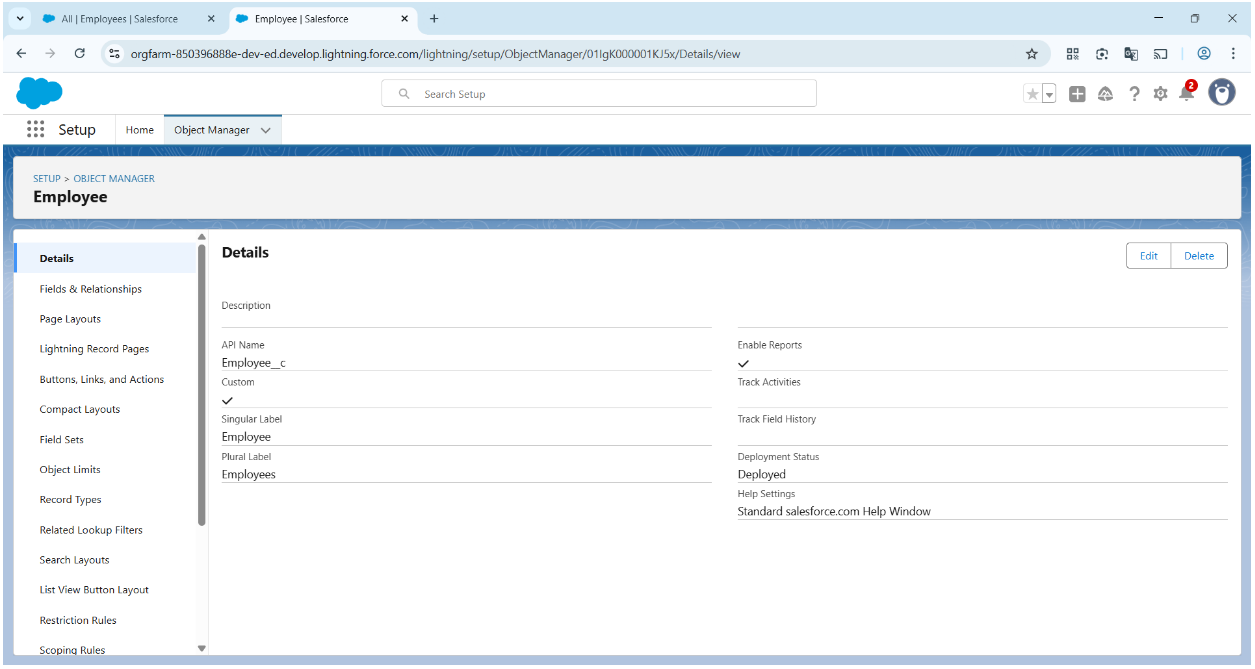
The Workforce Administration Solution project successfully demonstrates how Salesforce can be utilized to streamline and automate key HR operations within an organization. By configuring custom objects, establishing secure data relationships, and implementing user roles, profiles, reports, and dashboards,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

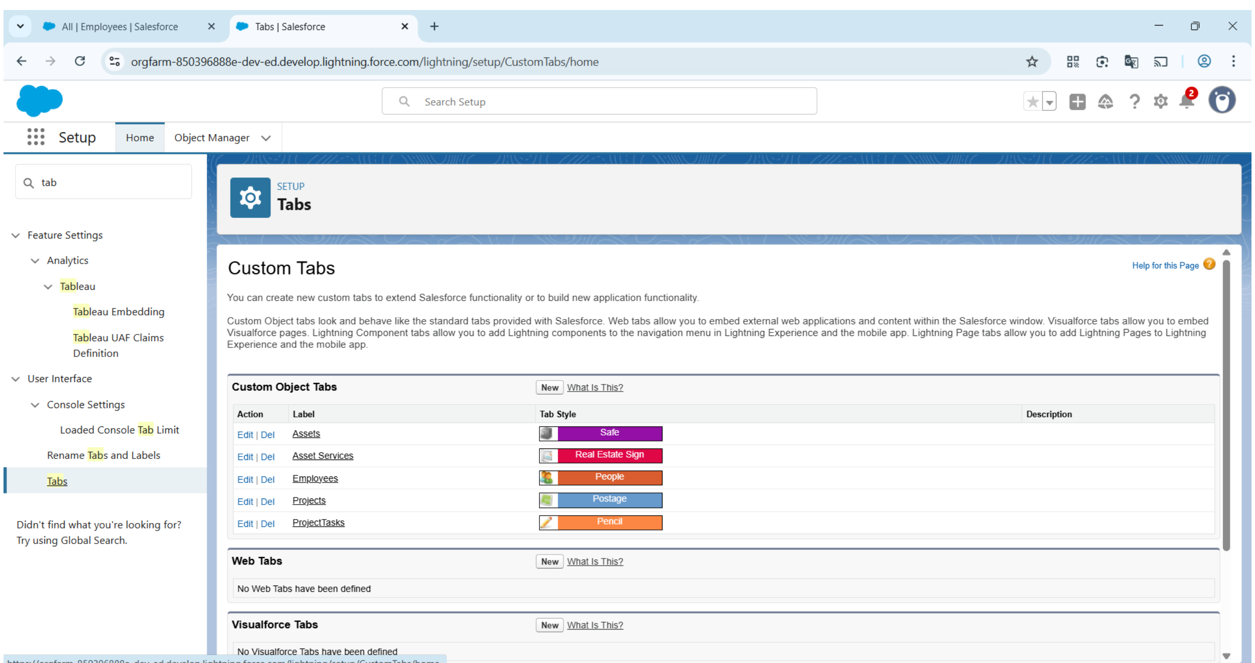
This hands-on experience enhanced my understanding of Salesforce fundamentals and provided real-time exposure to CRM-based application development. It has strengthened my ability to design, build, and present practical solutions that align with business needs.

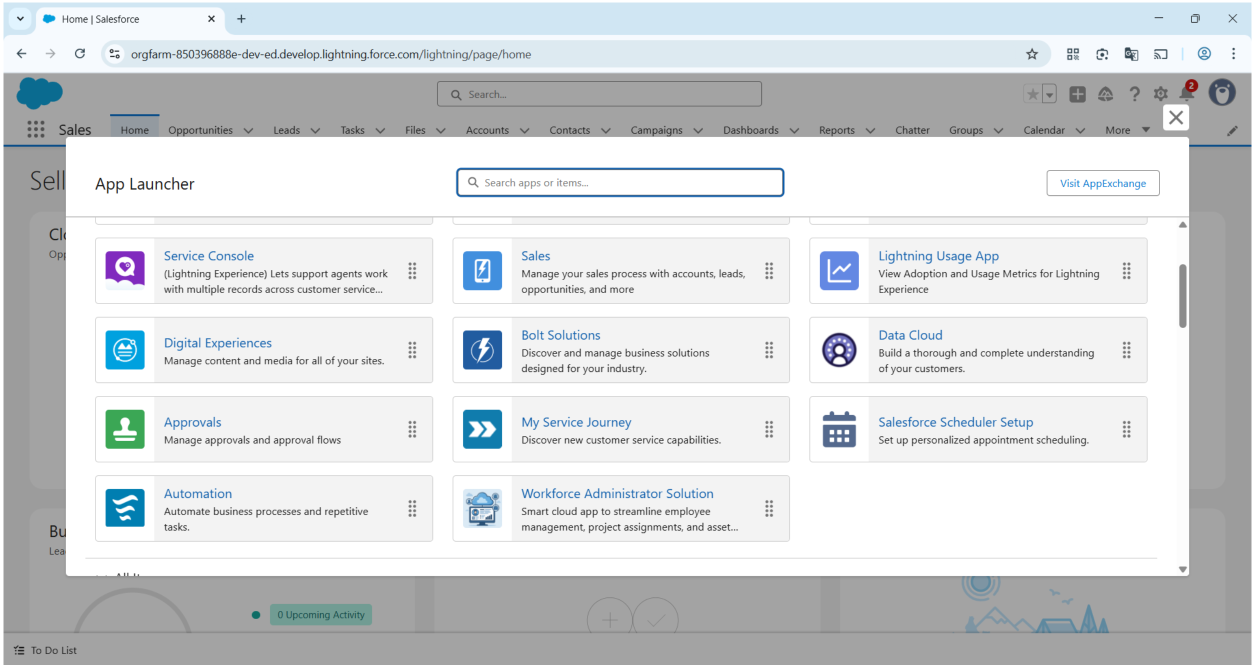
Additional Screen Captures

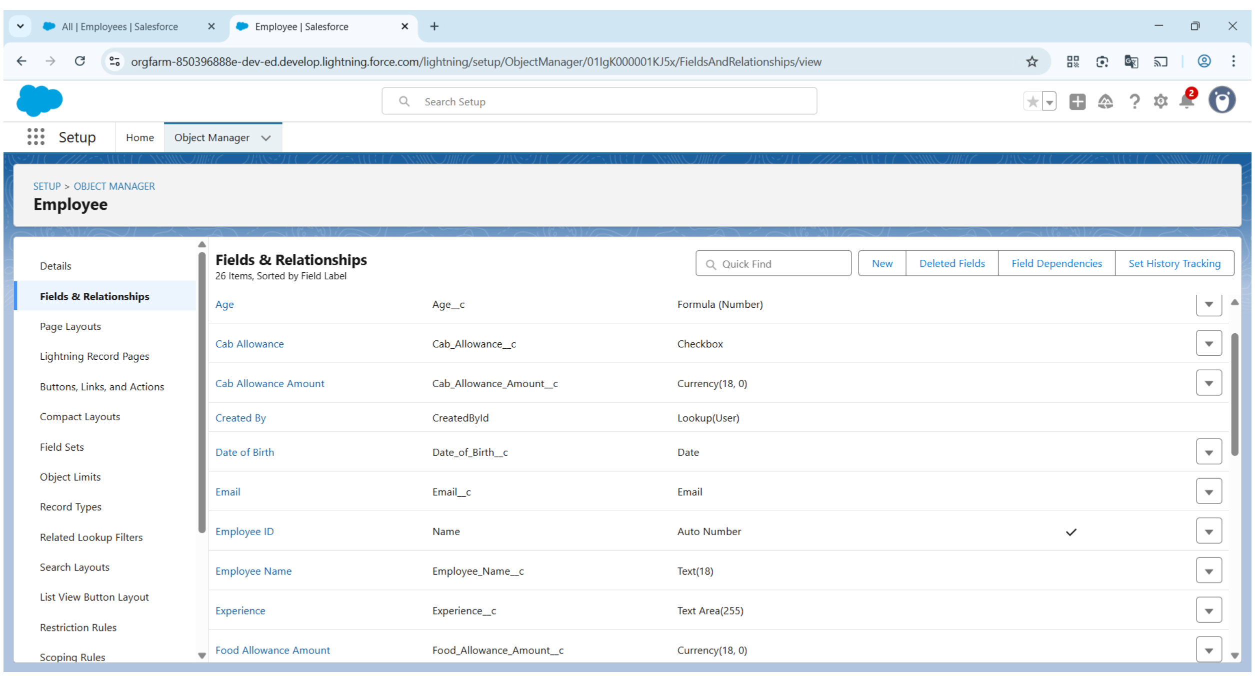


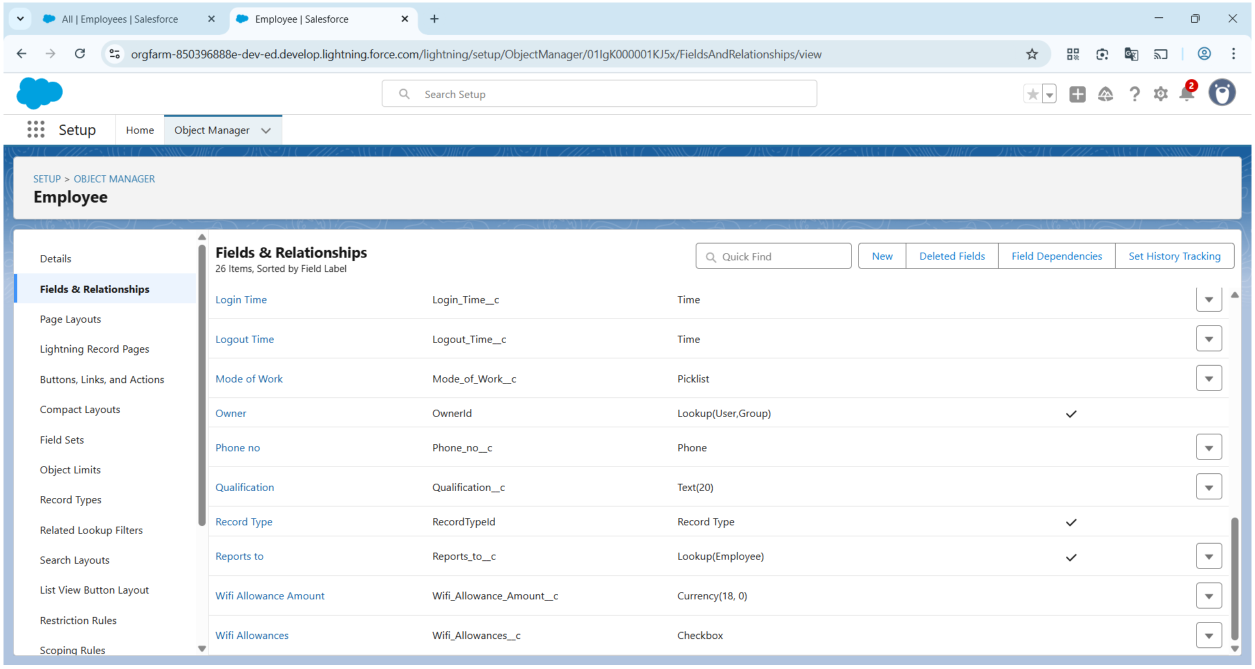


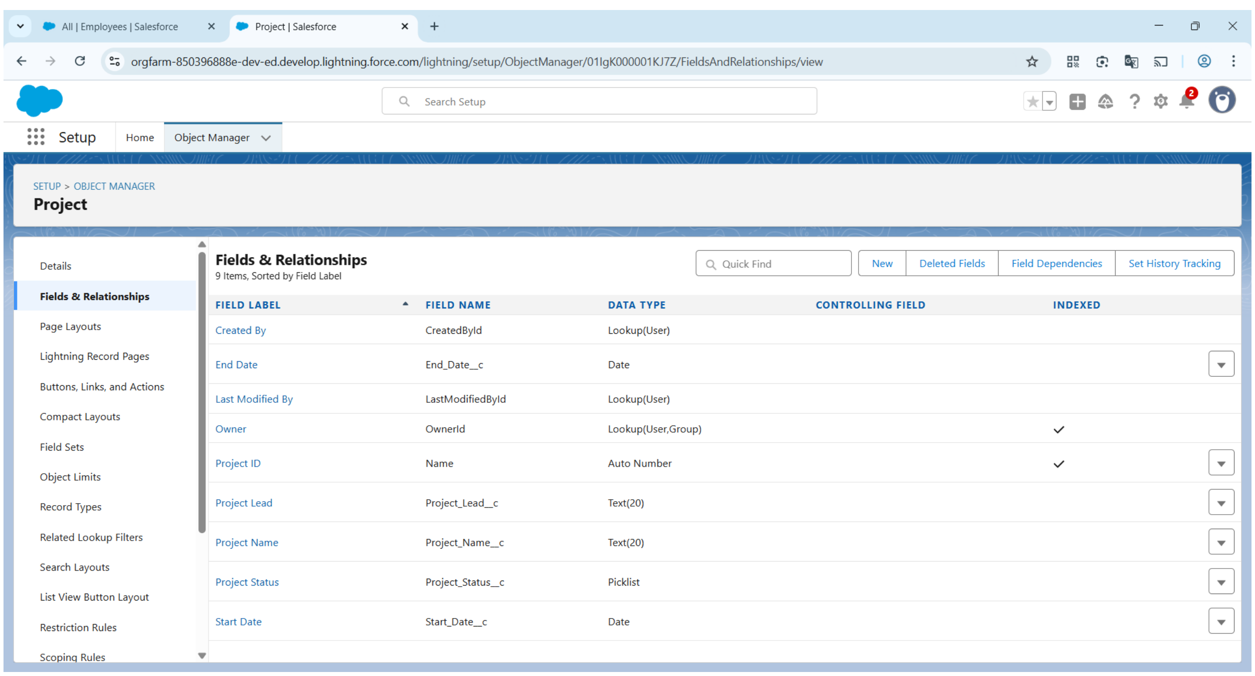

All | Employees | Salesforce
Employee | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001KJ5x/Details/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
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
Details
Edit
Delete
Description
API Name
Employee__c
Custom
Singular Label
Employee
Plural Label
Employees
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

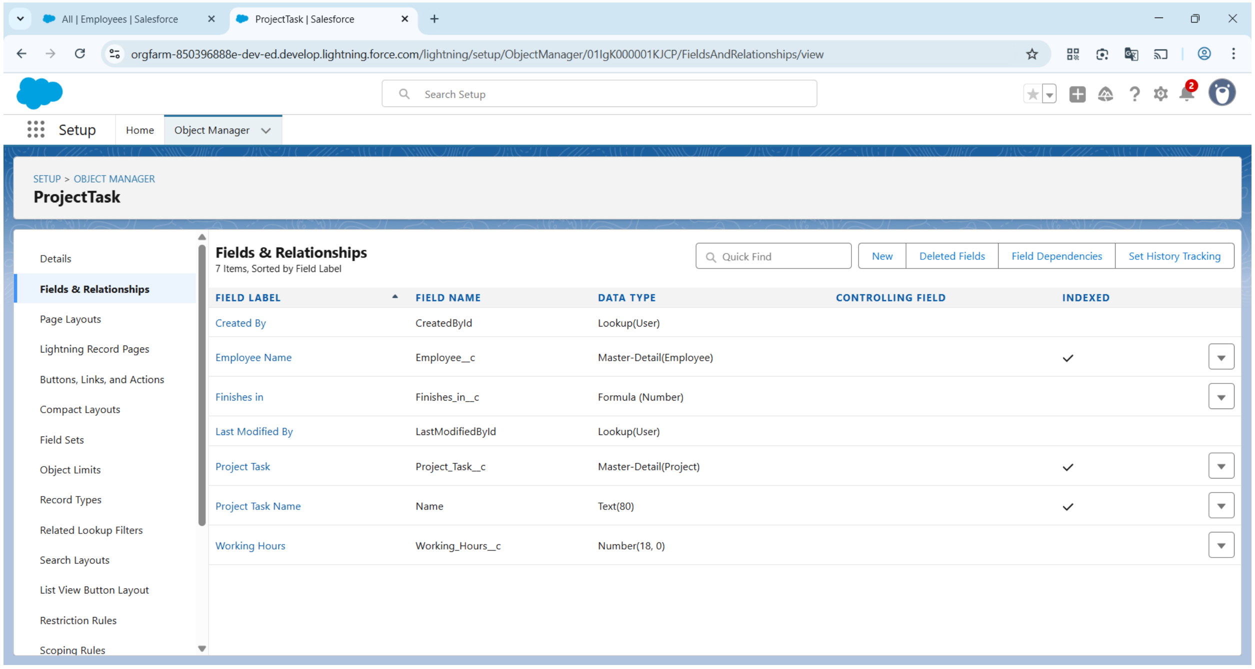

All | Employees | Salesforce
Tabs | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home
Search Setup
Setup
Home
Object Manager
tab
Feature Settings
Analytics
Tableau
Tableau Embedding
Tableau UAF Claims Definition
User Interface
Console Settings
Loaded Console Tab Limit
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
Assets
Safe
Edit | Del
Asset Services
Real Estate Sign
Edit | Del
Employees
People
Edit | Del
Projects
Postage
Edit | Del
ProjectTasks
Pencil
Web Tabs
New
What Is This?
No Web Tabs have been defined
Visualforce Tabs
New
What Is This?
No Visualforce Tabs have been defined
https://orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

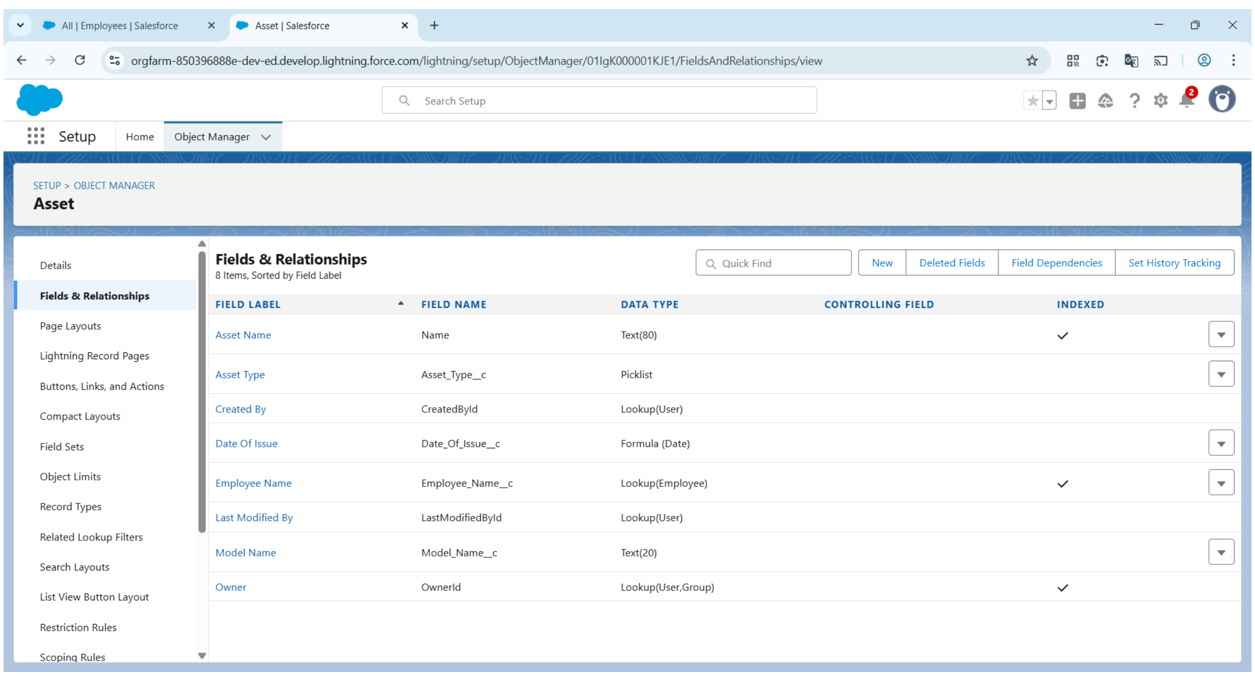

Home | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/page/home
Search...
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
Calendar
More
App Launcher
Search apps or items...
Visit AppExchange
Service Console
(Lightning Experience) Lets support agents work with multiple records across customer service...
Sales
Manage your sales process with accounts, leads, opportunities, and more
Lightning Usage App
View Adoption and Usage Metrics for Lightning Experience
Digital Experiences
Manage content and media for all of your sites.
Bolt Solutions
Discover and manage business solutions designed for your industry.
Data Cloud
Build a thorough and complete understanding of your customers.
Approvals
Manage approvals and approval flows
My Service Journey
Discover new customer service capabilities.
Salesforce Scheduler Setup
Set up personalized appointment scheduling.
Automation
Automate business processes and repetitive tasks.
Workforce Administrator Solution
Smart cloud app to streamline employee management, project assignments, and asset...
0 Upcoming Activity
To Do List

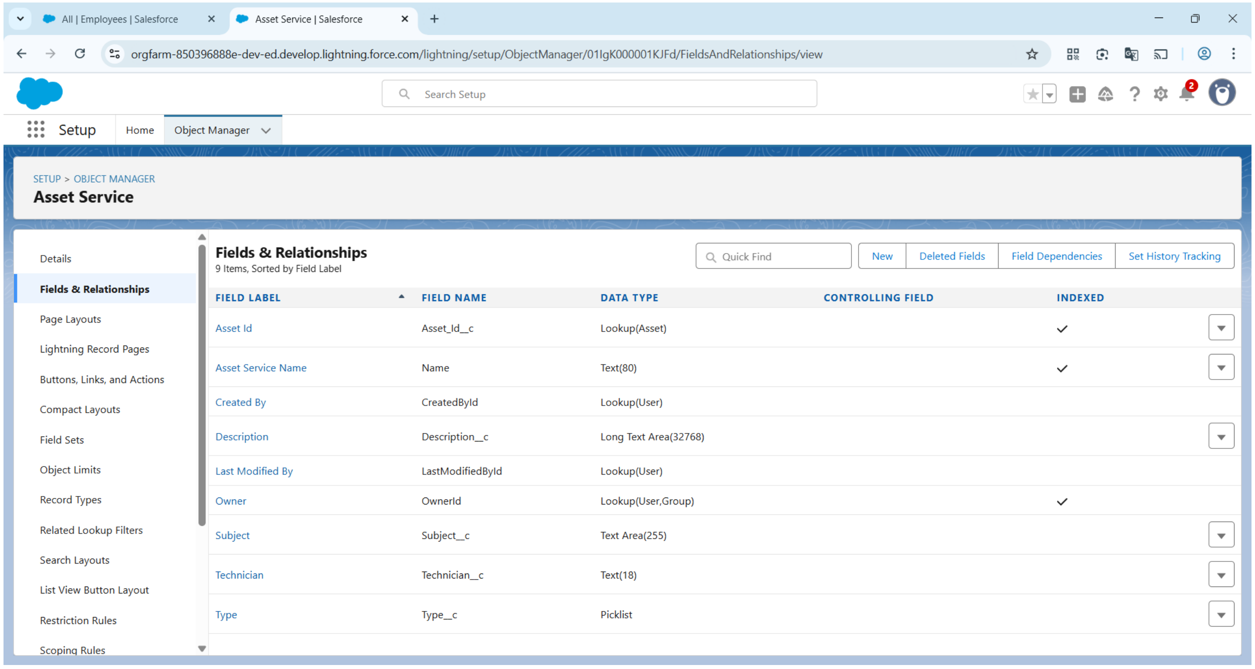

All | Employees | Salesforce
Employee | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001KJ5x/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee
Details
Fields & Relationships
Page Layouts
Lightning 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
Fields & Relationships
26 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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)
Food Allowance Amount
Food_Allowance_Amount__c
Currency(18, 0)


All | Employees | Salesforce
Employee | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001KJ5x/FieldsAndRelationships/view
Search Setup
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
Fields & Relationships
26 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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-850396888e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001KJ7Z/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Project
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
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED
Created By CreatedById Lookup(User)
End Date End_Date__c Date
Last Modified By LastModifiedById 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-850396888e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001KJCP/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
ProjectTask
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
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Employee 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)


All | Employees | Salesforce
Asset | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001KJE1/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Asset
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
8 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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)



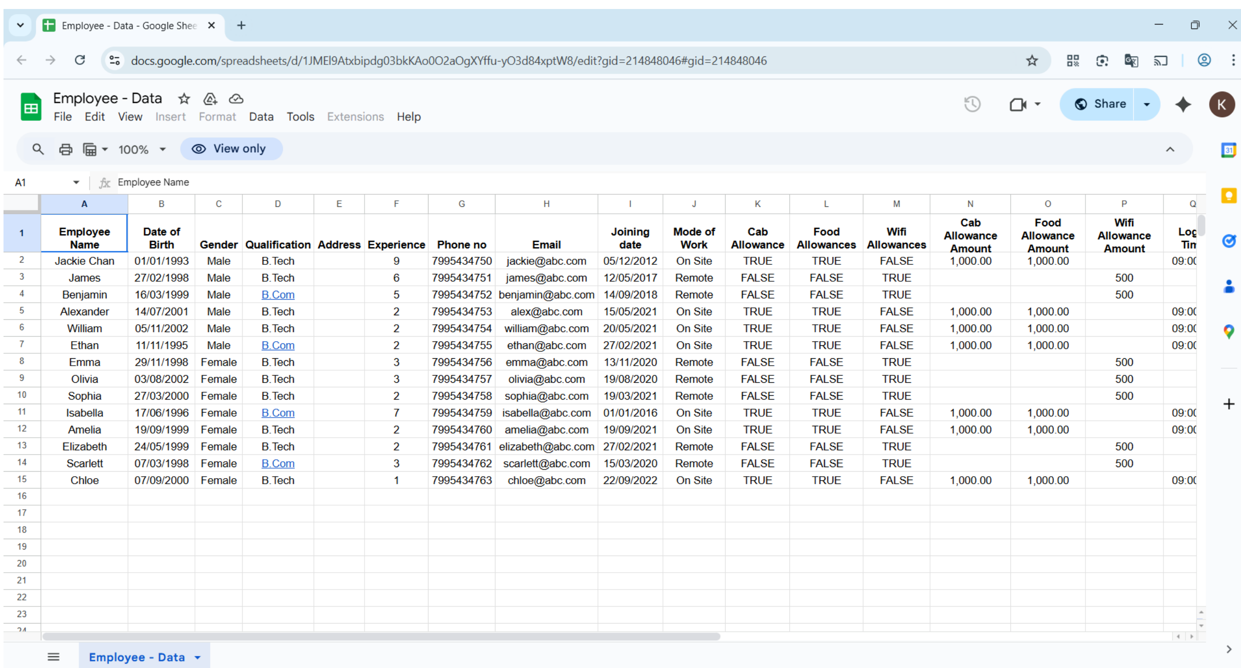
SETUP > OBJECT MANAGER

Asset Service

Fields & Relationships

9 Items, Sorted by Field Label

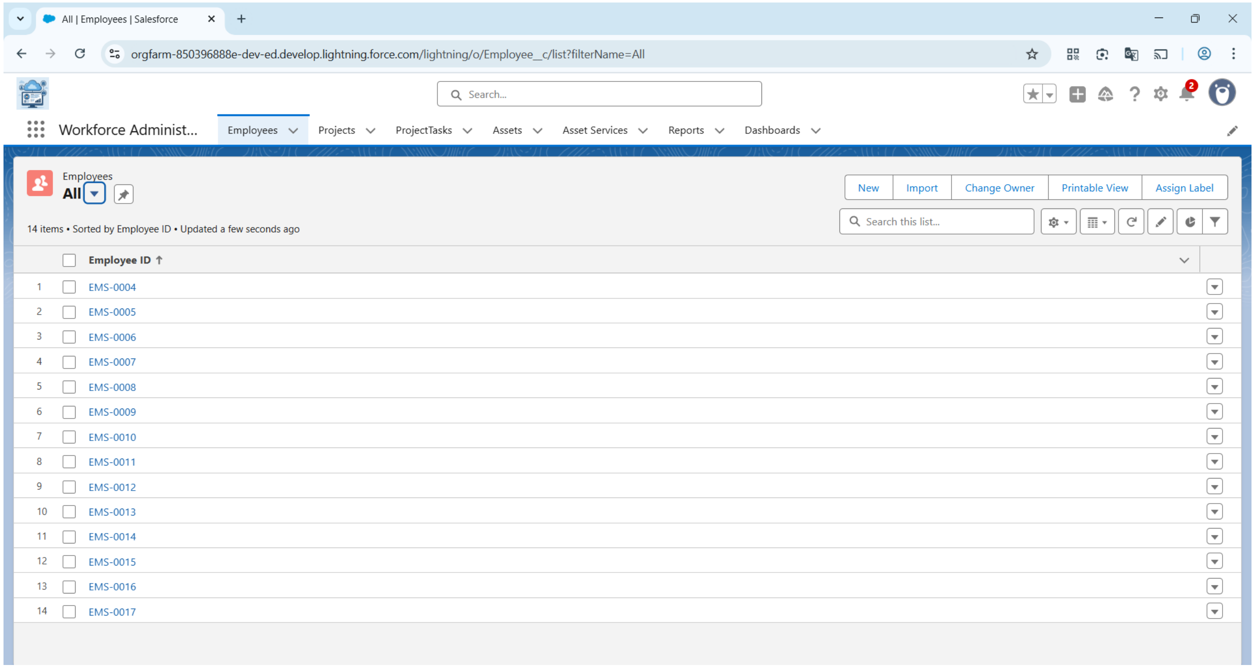
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Id	Asset_Id__c	Lookup(Asset)		✓
Asset Service Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(32768)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)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

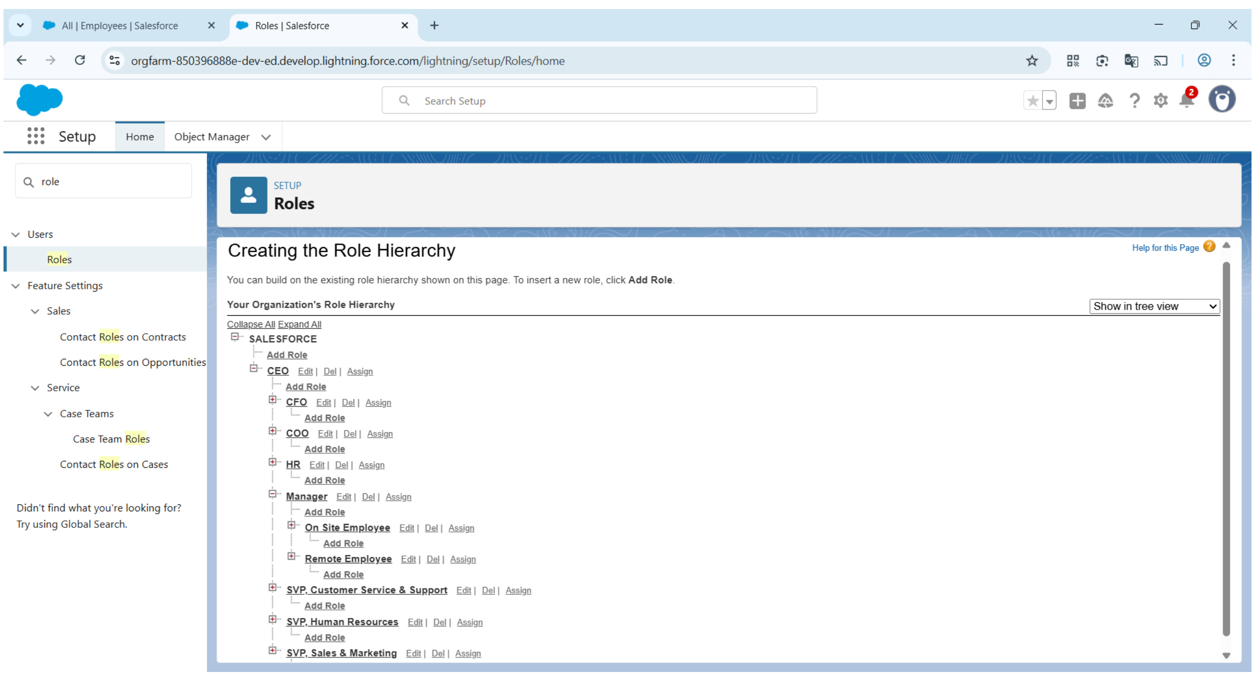


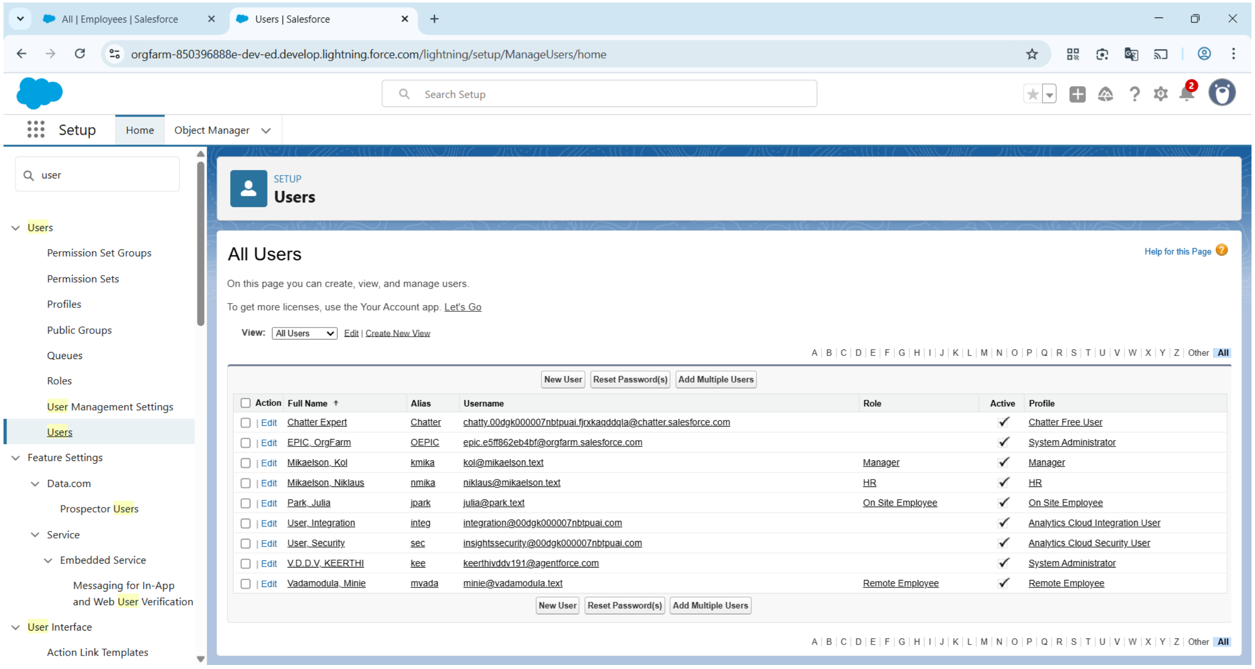
Employee - Data

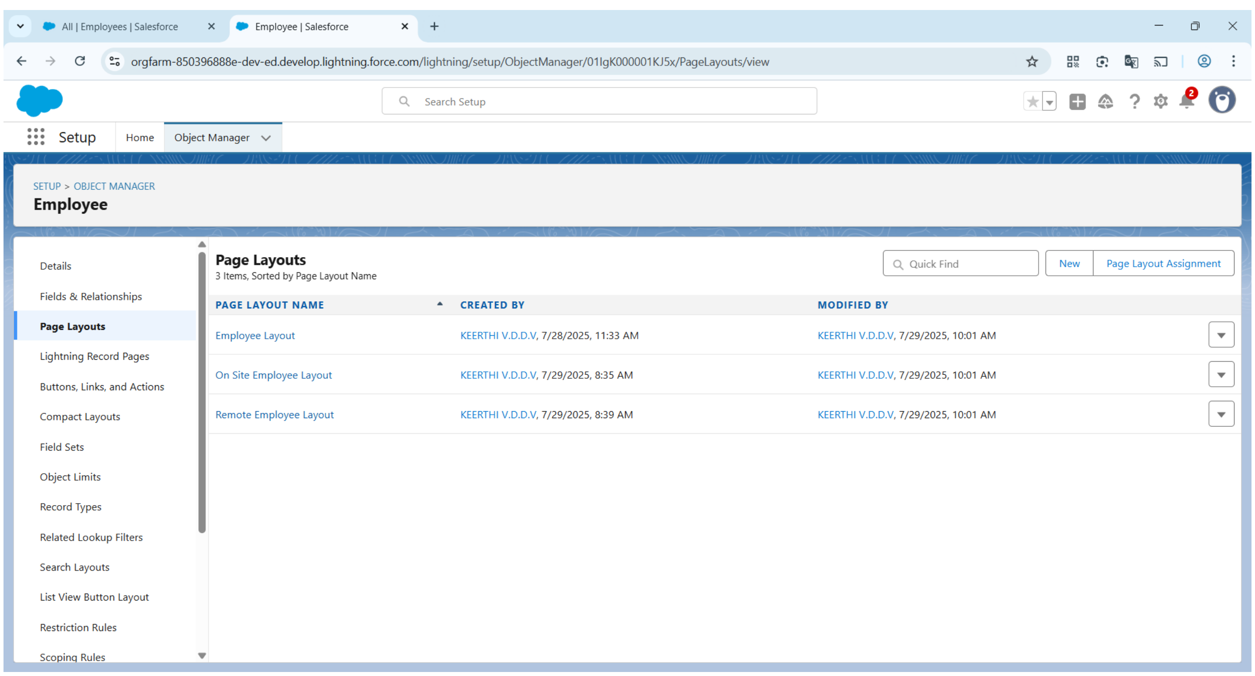
Employee Name	Date of Birth	Gender	Qualification	Address	Experience	Phone no	Email	Joining date	Mode of Work	Cab Allowance	Food Allowances	Wifi Allowances	Cab Allowance Amount	Food Allowance Amount	Wifi Allowance Amount	Log Tim
Jackie Chan	01/01/1993	Male	B.Tech		9	7995434750	jackie@abc.com	05/12/2012	On Site	TRUE	TRUE	FALSE	1,000.00	1,000.00		09:0
James	27/02/1998	Male	B.Tech		6	7995434751	james@abc.com	12/05/2017	Remote	FALSE	FALSE	TRUE			500	
Benjamin	16/03/1999	Male	B.Com		5	7995434752	benjamin@abc.com	14/09/2018	Remote	FALSE	FALSE	TRUE			500	
Alexander	14/07/2001	Male	B.Tech		2	7995434753	alex@abc.com	15/05/2021	On Site	TRUE	TRUE	FALSE	1,000.00	1,000.00		09:0
William	05/11/2002	Male	B.Tech		2	7995434754	william@abc.com	20/05/2021	On Site	TRUE	TRUE	FALSE	1,000.00	1,000.00		09:0
Ethan	11/11/1995	Male	B.Com		2	7995434755	ethan@abc.com	27/02/2021	On Site	TRUE	TRUE	FALSE	1,000.00	1,000.00		09:0
Emma	29/11/1998	Female	B.Tech		3	7995434756	emma@abc.com	13/11/2020	Remote	FALSE	FALSE	TRUE			500	
Olivia	03/08/2002	Female	B.Tech		3	7995434757	olivia@abc.com	19/08/2020	Remote	FALSE	FALSE	TRUE			500	
Sophia	27/03/2000	Female	B.Tech		2	7995434758	sophia@abc.com	19/03/2021	Remote	FALSE	FALSE	TRUE			500	
Isabella	17/06/1996	Female	B.Com		7	7995434759	isabella@abc.com	01/01/2016	On Site	TRUE	TRUE	FALSE	1,000.00	1,000.00		09:0
Amelia	19/09/1999	Female	B.Tech		2	7995434760	amelia@abc.com	19/09/2021	On Site	TRUE	TRUE	FALSE	1,000.00	1,000.00		09:0
Elizabeth	24/05/1999	Female	B.Tech		2	7995434761	elizabeth@abc.com	27/02/2021	Remote	FALSE	FALSE	TRUE			500	
Scarlett	07/03/1998	Female	B.Com		3	7995434762	scarlett@abc.com	15/03/2020	Remote	FALSE	FALSE	TRUE			500	
Chloe	07/09/2000	Female	B.Tech		1	7995434763	chloe@abc.com	22/09/2022	On Site	TRUE	TRUE	FALSE	1,000.00	1,000.00		09:0

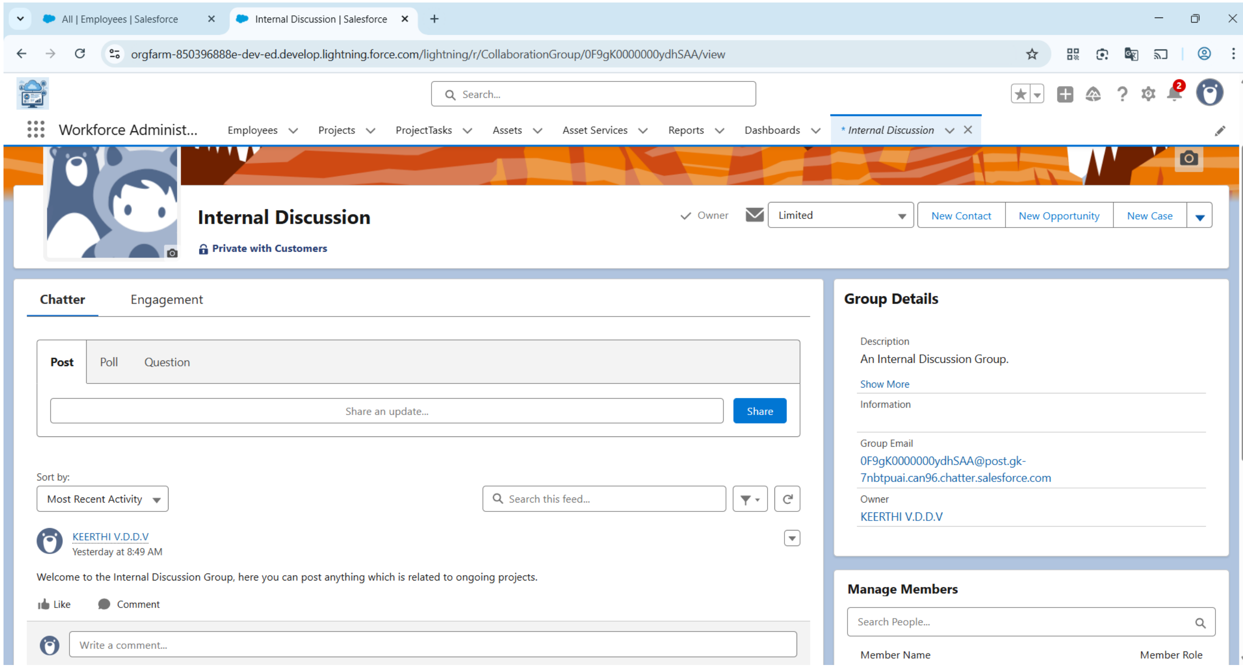
Employee - Data

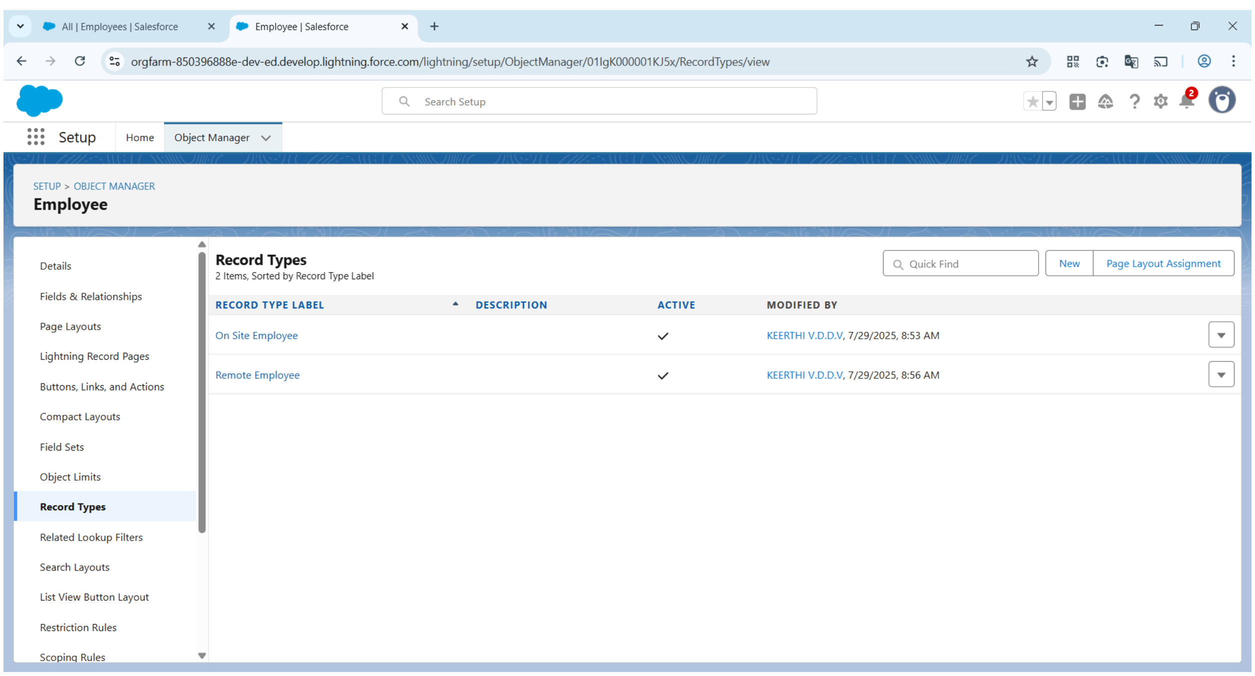

All | Employees | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/o/Employee__c/list?filterName=All
Search...
Workforce Administ...
Employees
Projects
ProjectTasks
Assets
Asset Services
Reports
Dashboards
Employees
All
New
Import
Change Owner
Printable View
Assign Label
Search this list...
14 items • Sorted by Employee ID • Updated a few seconds ago
Employee ID
1 EMS-0004
2 EMS-0005
3 EMS-0006
4 EMS-0007
5 EMS-0008
6 EMS-0009
7 EMS-0010
8 EMS-0011
9 EMS-0012
10 EMS-0013
11 EMS-0014
12 EMS-0015
13 EMS-0016
14 EMS-0017

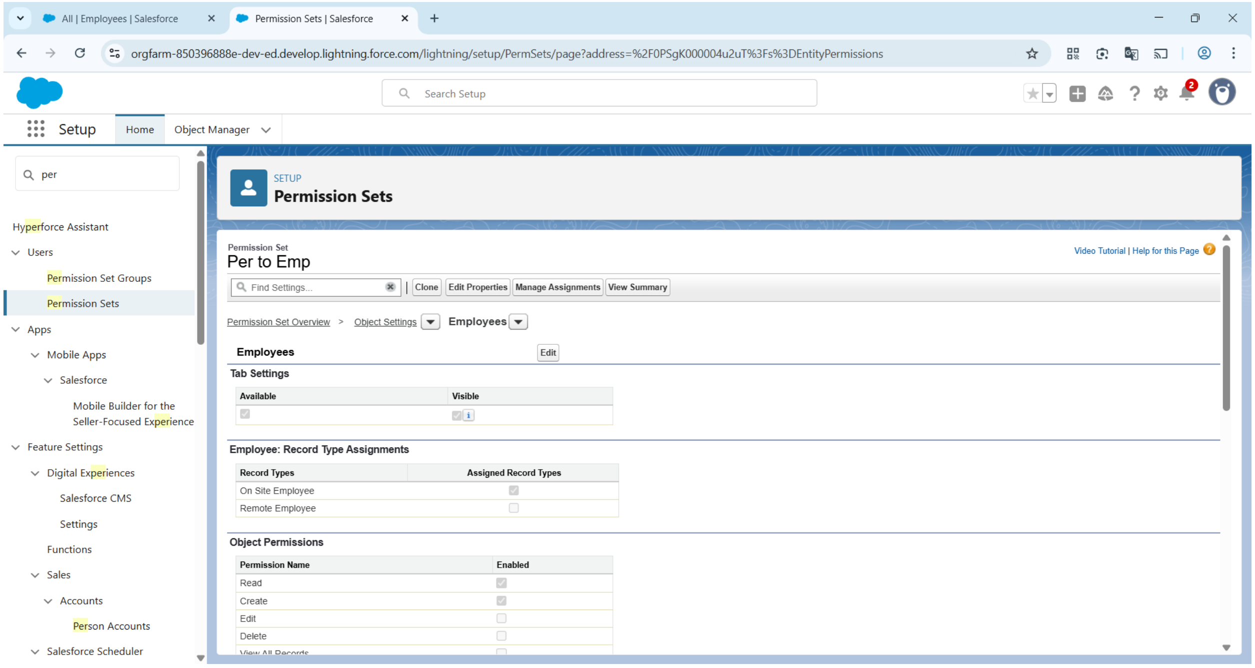

All | Employees | Salesforce
Roles | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home
Search Setup
Setup
Home
Object Manager
role
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Creating the Role Hierarchy
Help for this Page
You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.
Your Organization's Role Hierarchy
Show in tree view
Collapse All Expand All
SALESFORCE
Add Role
CEO Edit | Del | Assign
Add Role
CFO Edit | Del | Assign
Add Role
COO Edit | Del | Assign
Add Role
HR Edit | Del | Assign
Add Role
Manager Edit | Del | Assign
Add Role
On Site Employee Edit | Del | Assign
Add Role
Remote Employee Edit | Del | Assign
Add Role
SVP, Customer Service & Support Edit | Del | Assign
Add Role
SVP, Human Resources Edit | Del | Assign
Add Role
SVP, Sales & Marketing Edit | Del | Assign

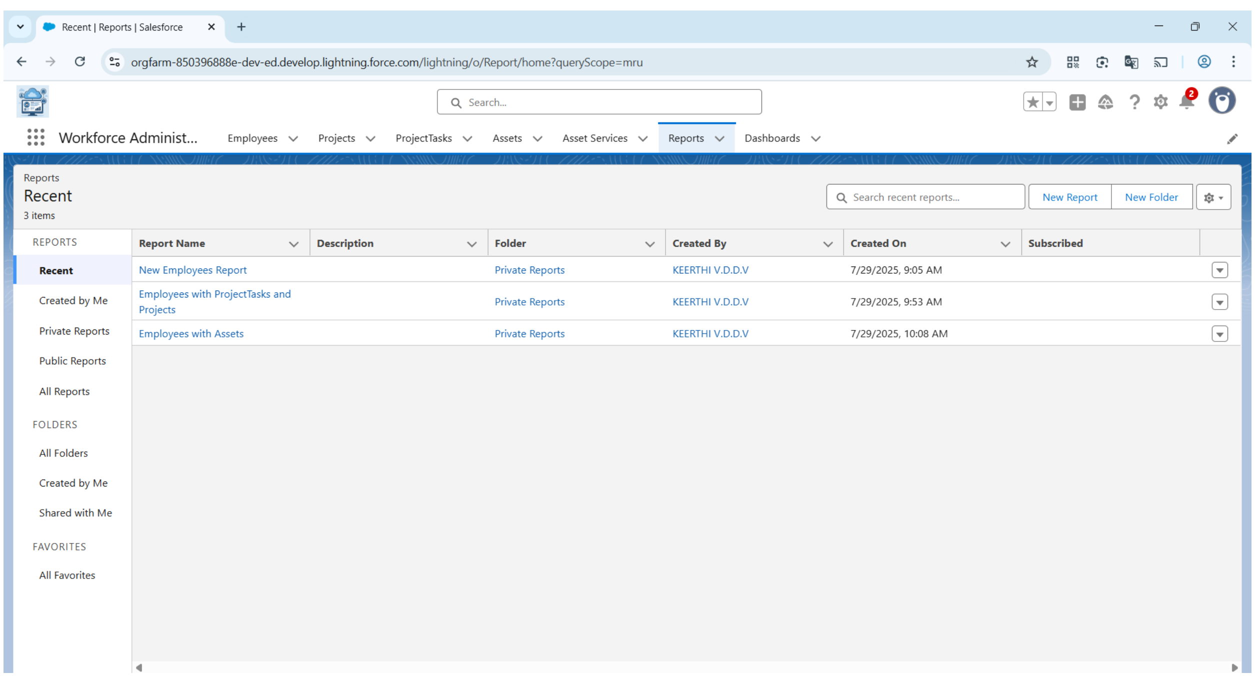

All | Employees | Salesforce
Users | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home
Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
Action Link Templates
SETUP
Users
All Users
Help for this Page
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
New User
Reset Password(s)
Add Multiple Users
Action Full Name Alias Username Role Active Profile
Edit Chatter Expert Chatter chatty.00dgk000007nbtpuai.fjrxkaqddqla@chatter.salesforce.com Chatter Free User
Edit EPIC, OrgFarm OEPIC epic.e5ff862eb4bf@orgfarm.salesforce.com System Administrator
Edit Mikaelson, Kol kmika kol@mikaelson.text Manager Manager
Edit Mikaelson, Niklaus nmika niklaus@mikaelson.text HR HR
Edit Park, Julia jpark julia@park.text On Site Employee On Site Employee
Edit User, Integration integ integration@00dgk000007nbtpuai.com Analytics Cloud Integration User
Edit User, Security sec insightssecurity@00dgk000007nbtpuai.com Analytics Cloud Security User
Edit V.D.D.V, KEERTHI kee keerthivddv191@agentforce.com System Administrator
Edit Vadamodula, Minie mvada minie@vadamodula.text Remote Employee Remote Employee

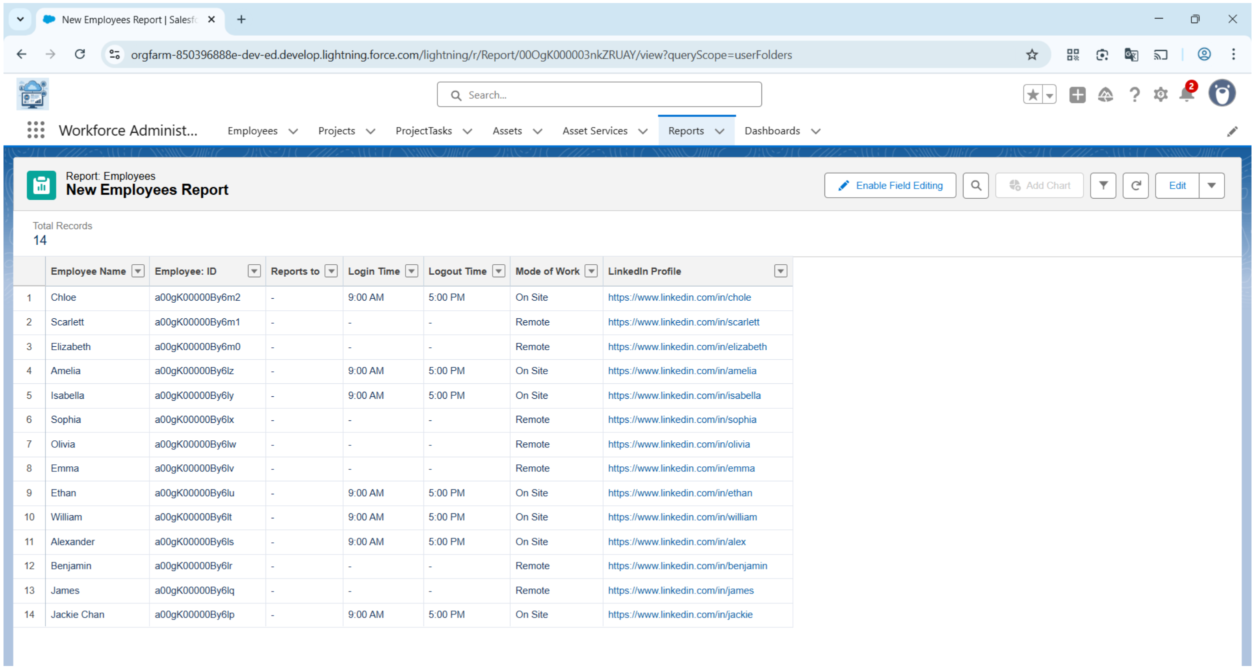

All | Employees | Salesforce
Employee | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001KJ5x/PageLayouts/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
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
Page Layouts
3 Items, Sorted by Page Layout Name
Quick Find
New
Page Layout Assignment
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


All | Employees | Salesforce
Internal Discussion | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/r/CollaborationGroup/0F9gK0000000ydhSAA/view
Search...
Workforce Administ...
Employees
Projects
ProjectTasks
Assets
Asset Services
Reports
Dashboards
* Internal Discussion
Internal Discussion
Private with Customers
Owner
Limited
New Contact
New Opportunity
New Case
Chatter
Engagement
Post
Poll
Question
Share an update...
Share
Sort by:
Most Recent Activity
Search this feed...
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
0F9gK0000000ydhSAA@post.gk-7nbtpuai.can96.chatter.salesforce.com
Owner
KEERTHI V.D.D.V
Manage Members
Search People...
Member Name
Member Role

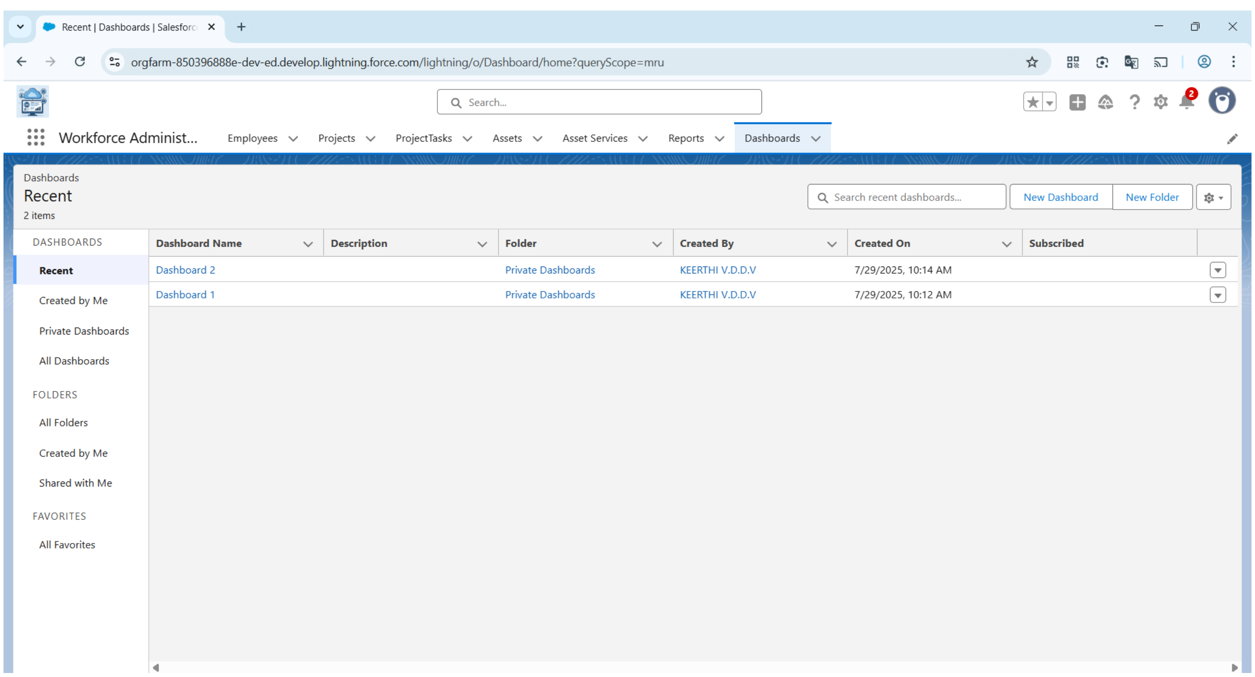

All | Employees | Salesforce
Employee | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000001KJ5x/RecordTypes/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
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
Quick Find
New
Page Layout Assignment
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


All | Employees | Salesforce
Permission Sets | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSgK000004u2uT%3Fs%3DEntityPermissions
Search Setup
Setup
Home
Object Manager
per
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
Permission Set
Per to Emp
Video Tutorial | Help for this Page
Find Settings...
Clone
Edit Properties
Manage Assignments
View Summary
Permission Set Overview > Object Settings
Employees
Employees
Edit
Tab Settings
Available
Visible
Employee: Record Type Assignments
Record Types
Assigned Record Types
On Site Employee
Remote Employee
Object Permissions
Permission Name
Enabled
Read
Create
Edit
Delete

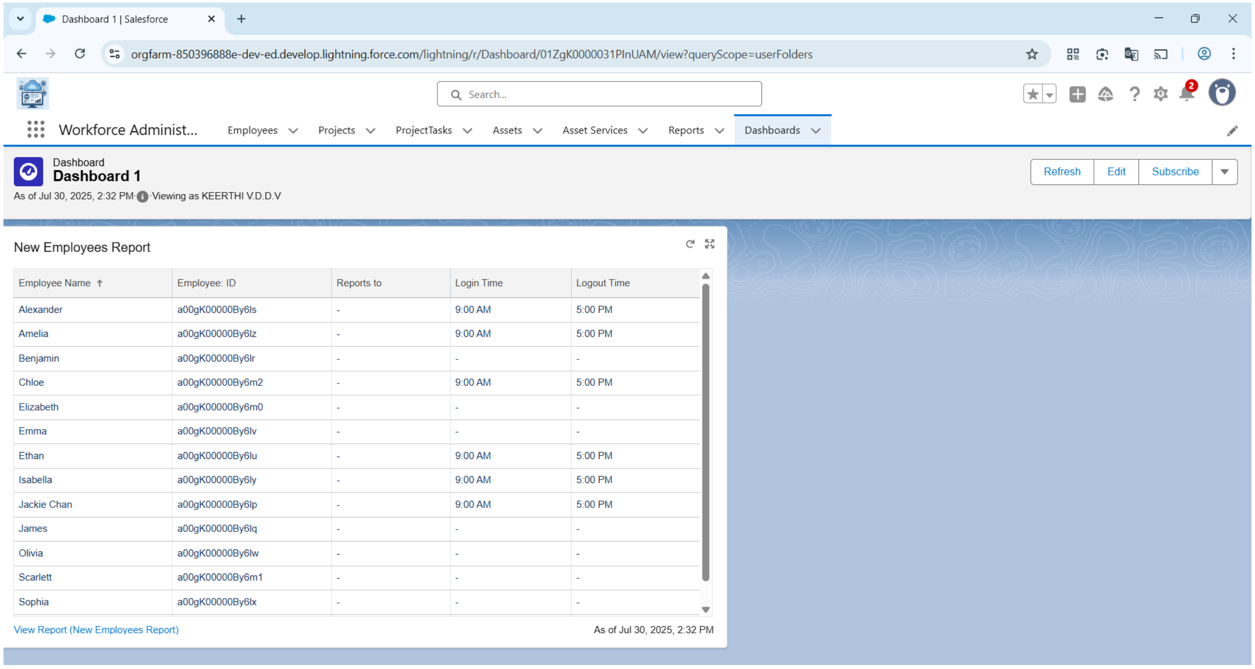

Recent | Reports | Salesforce
orgfarm-850396888e-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru
Search...
Workforce Administ...
Employees
Projects
ProjectTasks
Assets
Asset Services
Reports
Dashboards
Reports
Recent
3 items
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
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
Employees with ProjectTasks and Projects
Private Reports
KEERTHI V.D.D.V
7/29/2025, 9:53 AM
Employees with Assets
Private Reports
KEERTHI V.D.D.V
7/29/2025, 10:08 AM



	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	a00gK00000By6lz	-	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



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



DEMO VIDEO :

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

GITHUB REPOSITORY:

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