

NAAN MUDHALVAN

SALESFORCE PROJECT REPORT

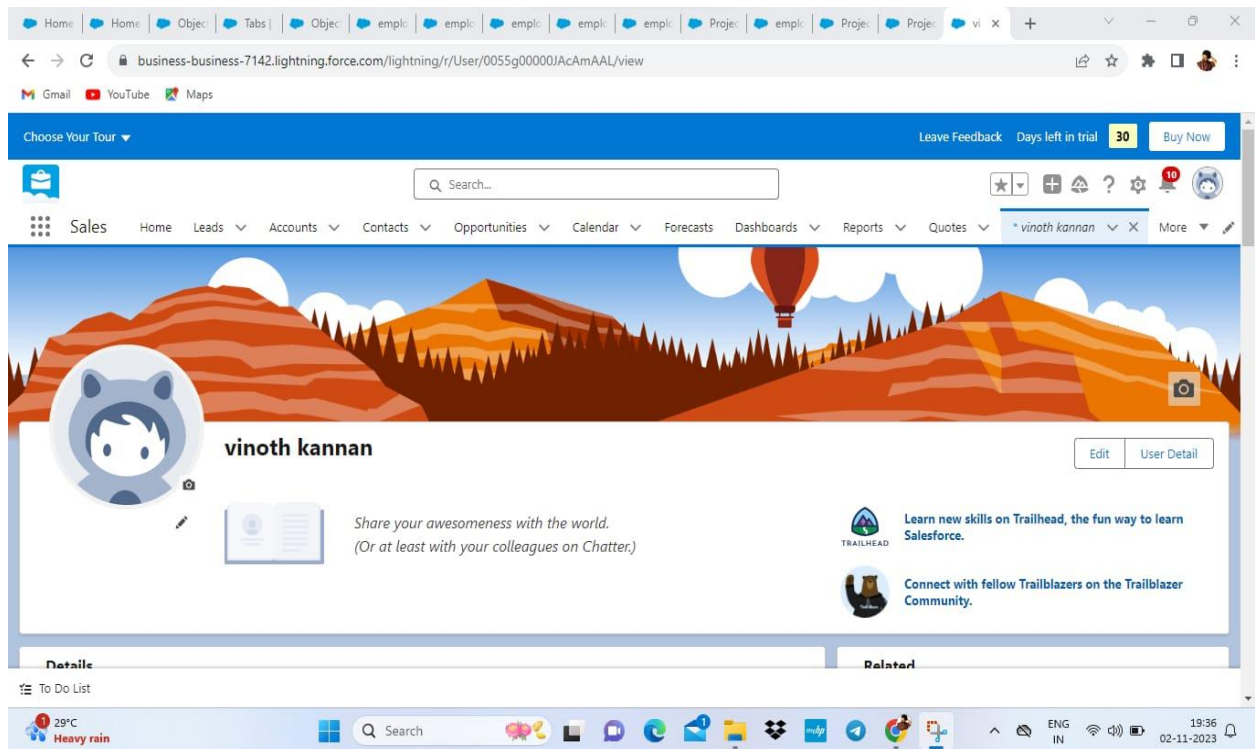
COLLEGE : SCAD COLLEGE OF ENGINEERING AND TECHNOLOGY

PROJECT TITLE : WORKFORCE ADMINISTRATION SOLUTION

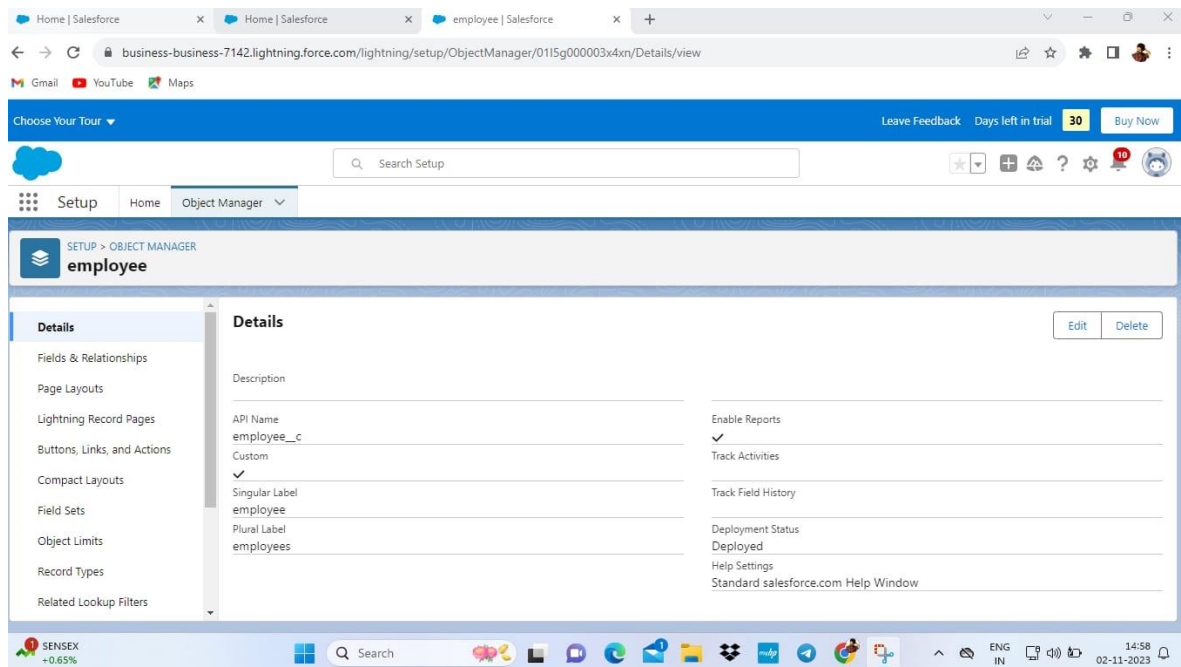
BATCH : 13

NAME	NM ID	REG. NO
VINOTHKANNAN L.S	F434B010C01E7C7800D43D9B3641DE9E	952820115291
SEYATHUNAVAS M	A9DA0641E3CE768A8574BA5B5632C636	952820116248
VIJAYAN K	8C4844128E422018C3243DDFD631DD72	952820115929
SANKARSUBBU M	AA0C09EC18EA4D78BA349C3CD8702EA9	952820115610

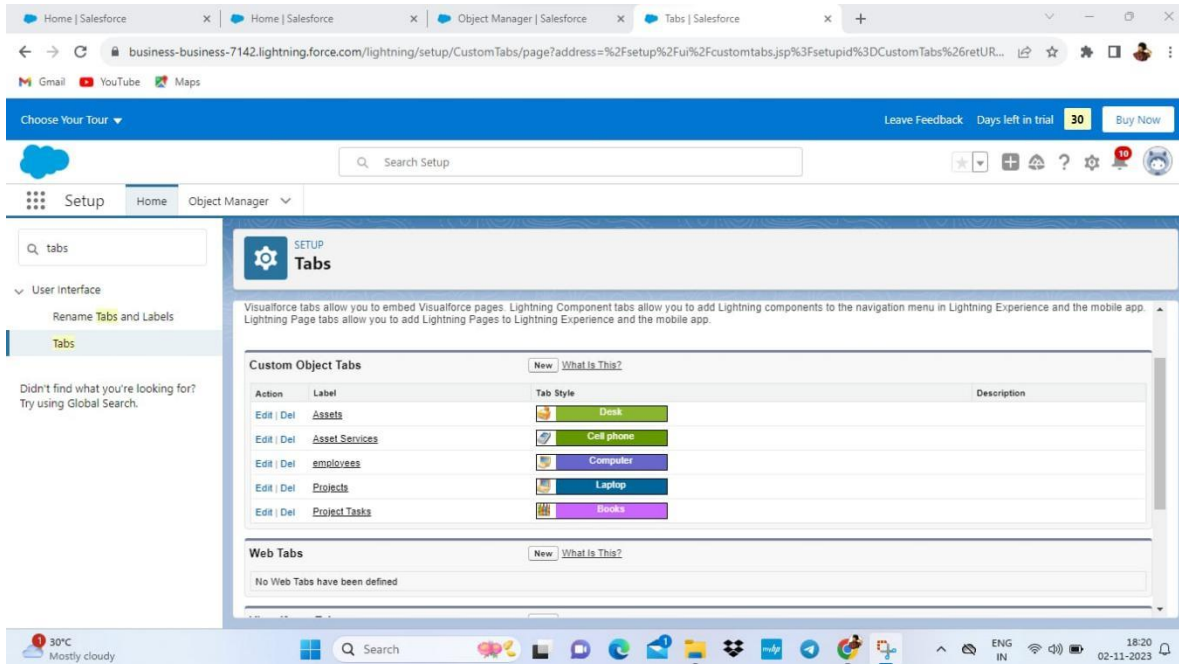
MILESTONE 1 : CREATION OF DEVELOPER ACCOUNT



MILESTONE 2 : OBJECT CREATION



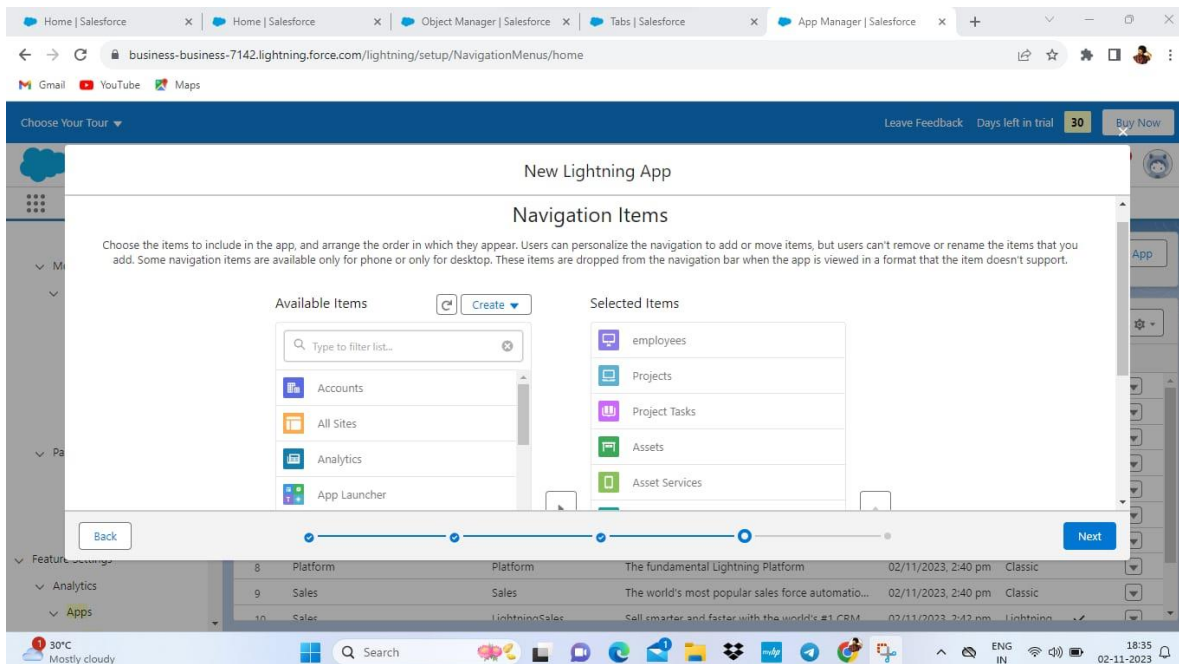
MILESTONE 3 : TABS CREATION



The screenshot shows the Salesforce Setup interface for the 'Tabs' section. The left sidebar contains a search bar with 'tabs' entered and a list of navigation items including 'User Interface', 'Rename Tabs and Labels', and 'Tabs'. The main content area is titled 'SETUP Tabs' and includes a description: '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.' Below this, there are two sections: 'Custom Object Tabs' and 'Web Tabs'. The 'Custom Object Tabs' section contains a table with columns 'Action', 'Label', 'Tab Style', and 'Description'. The 'Web Tabs' section shows 'No Web Tabs have been defined'.

Action	Label	Tab Style	Description
Edit / Del	Assets	Desk	
Edit / Del	Asset Services	Cell phone	
Edit / Del	employees	Computer	
Edit / Del	Projects	Laptop	
Edit / Del	Project Tasks	Books	

MILESTONE 4 : CREATE APP



The screenshot shows the Salesforce App Manager interface for creating a new Lightning app. The main heading is 'New Lightning App' and the sub-heading is 'Navigation Items'. A description states: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' Below this, there are two columns: 'Available Items' and 'Selected Items'. The 'Available Items' column contains a search bar and a list of items: 'Accounts', 'All Sites', 'Analytics', and 'App Launcher'. The 'Selected Items' column contains a list of items: 'employees', 'Projects', 'Project Tasks', 'Assets', and 'Asset Services'. At the bottom, there is a 'Back' button and a 'Next' button.

MILESTONE 5 : FIELDS & RELATIONSHIPS

The screenshot shows the Salesforce Setup interface for the 'employee' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Step 4. Add to page layouts' and includes a table with columns: Field Label, Data Type, Picklist, and Description. Below the table, there is a section for selecting page layouts to include the field, with checkboxes for 'Add Field' and 'employee Layout'. The bottom of the page shows a Windows taskbar with various application icons and system information.

MILESTONE 6 : SETTING OWD

The screenshot shows the Salesforce Setup interface for the 'Sharing Settings' page. The left sidebar contains a navigation menu with options: Security (selected), Sharing Settings, and a search bar. The main content area is titled 'Sharing Settings' and includes a table with columns: Quick Text, Quick Text Usage, Social Post, Thanks, Web Cart Document, Work Order, Asset, Asset Service, employee, and Project. Each row has a dropdown menu for selecting a sharing setting. Below the table, there are checkboxes for 'Standard Report Visibility', 'Manual User Record Sharing', 'Manager Groups', and 'Require permission to view record names in lookup fields'. The bottom of the page shows a Windows taskbar with various application icons and system information.

MILESTONE 7 : USER ADOPTION

The screenshot shows the Salesforce Lightning interface for viewing an employee record. The browser address bar displays the URL: `business-business-7142.lightning.force.com/lightning/r/employee__c/a015g00000xdk3AAI/view`. The page header includes navigation tabs like Sales, Home, Leads, Accounts, Contacts, Opportunities, Calendar, Forecasts, Dashboards, Reports, Quotes, and employees. The main content area shows the 'Details' tab for employee 'EMS-0001'. The record information is as follows:

Field	Value
Employee ID	EMS-0001
Employee Name	employee
Date of Birth	05/11/2002
Gender	Male
Reports to	
Owner	vinoth kannan
Created By	vinoth kannan · 02/11/2023, 7:47 pm
Last Modified By	vinoth kannan · 02/11/2023, 7:47 pm

The bottom of the screen shows a Windows taskbar with various application icons and system status information including temperature (25°C), rain showers, and the time (19:49 on 02-11-2023).

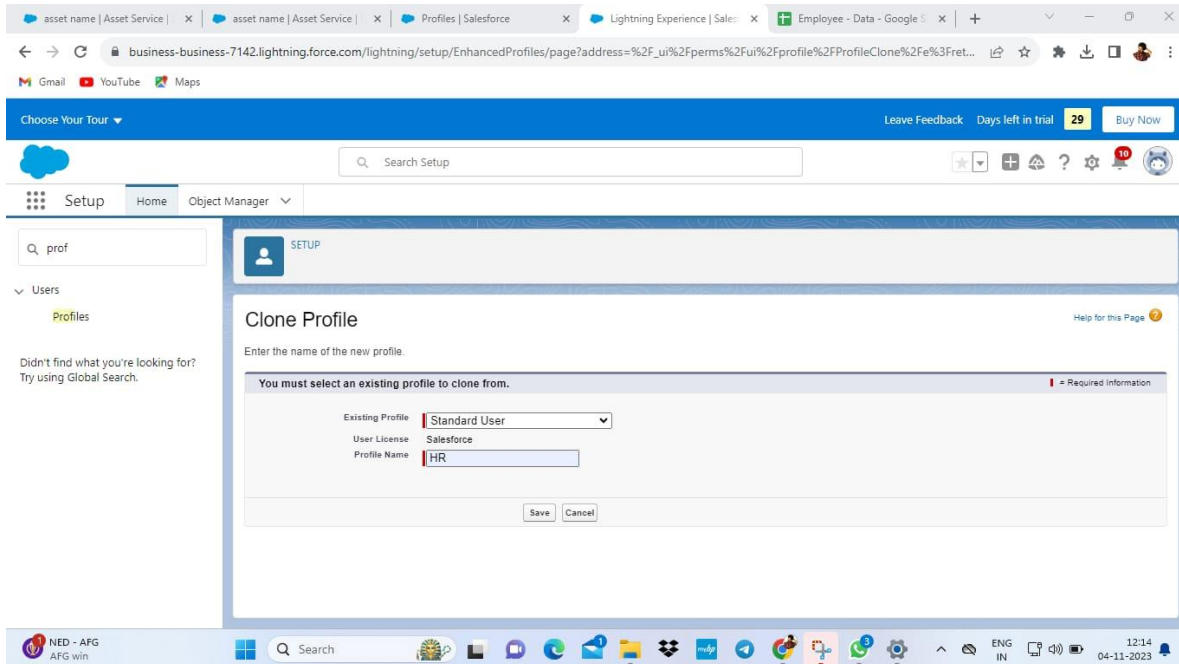
MILESTONE 8 : IMPORT DATA

The screenshot shows the Salesforce Lightning interface for the Data Import Wizard. The browser address bar displays the URL: `business-business-7142.lightning.force.com/lightning/setup/DataManagementDataImporter/home`. The page header includes navigation tabs like Setup, Home, and Object Manager. The main content area shows the 'Review & Start Import' step, which includes a progress bar with three stages: Choose data, Edit mapping, and Start import. The 'Review & Start Import' section provides a summary of the import process:

- Your selections:** employees, Add new records, Employee - Data - Employee - Data.csv
- Your import will include:** Mapped fields (16)
- Your import will not include:** Unmapped fields (3)

The bottom of the screen shows a Windows taskbar with various application icons and system status information including language (ENG - AUS), time (11:36), and date (04-11-2023).

MILESTONE 9 : PROFILES

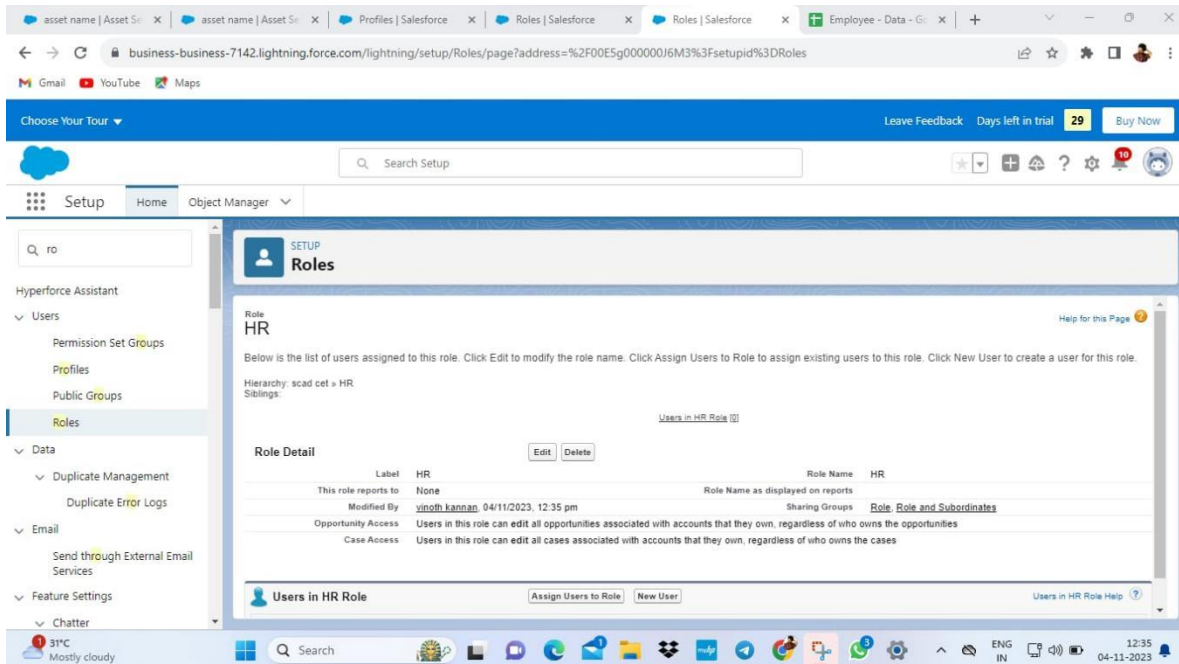


The screenshot shows the Salesforce Setup interface for cloning a profile. The browser tabs include 'asset name | Asset Service', 'Profiles | Salesforce', 'Lightning Experience | Sales', and 'Employee - Data - Google'. The URL is 'business-business-7142.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2Fui%2Fperms%2Fui%2Fprofile%2FProfileClone%2F%3Fret...'. The left sidebar shows 'Setup' with a search for 'prof' and a list of 'Users' and 'Profiles'. The main content area is titled 'Clone Profile' and contains a form with the following fields:

- Existing Profile: Standard User (dropdown)
- User License: Salesforce
- Profile Name: HR

Buttons for 'Save' and 'Cancel' are at the bottom. A 'Required Information' error message is visible. The bottom status bar shows 'NED - AFG AFG win' and the date '04-11-2023'.

MILESTONE 10 : ROLE



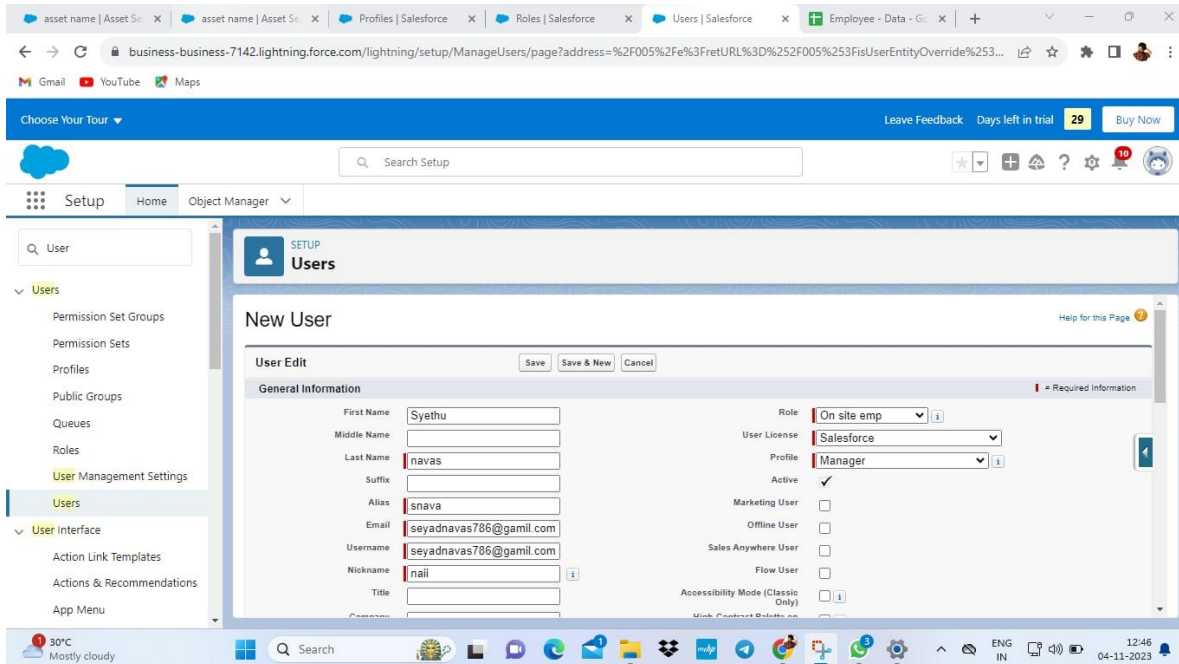
The screenshot shows the Salesforce Setup interface for roles. The browser tabs include 'asset name | Asset Service', 'Profiles | Salesforce', 'Roles | Salesforce', and 'Employee - Data - Google'. The URL is 'business-business-7142.lightning.force.com/lightning/setup/Roles/page?address=%2F00E5g000000J6M3%3Fsetupid%3DRoles'. The left sidebar shows 'Setup' with a search for 'ro' and a list of 'Users', 'Permission Set Groups', 'Profiles', 'Public Groups', and 'Roles'. The main content area is titled 'Roles' and displays the details for the 'HR' role.

Role Detail

Label	HR	Role Name	HR
This role reports to	None	Role Name as displayed on reports	
Modified By	vinodh.kannan 04/11/2023, 12:35 pm	Sharing Groups	Role, Role and Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

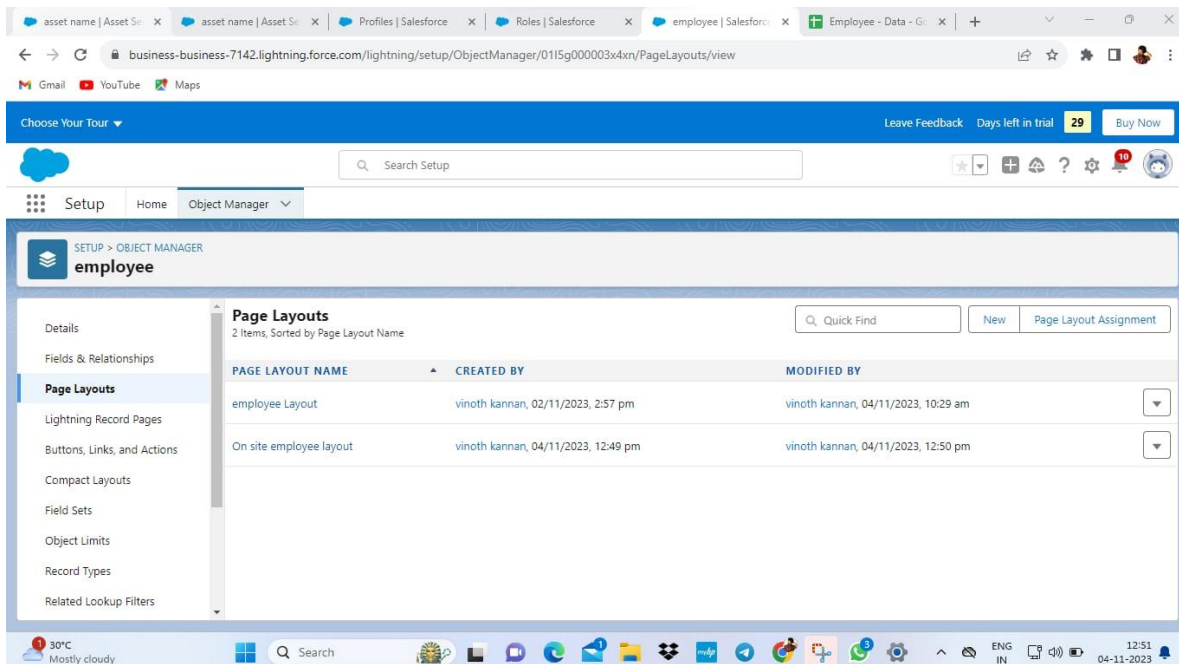
Buttons for 'Edit' and 'Delete' are visible. Below the table, there is a section for 'Users in HR Role' with buttons for 'Assign Users to Role' and 'New User'.

MILESTONE 11 : USERS



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a navigation menu with options like 'User', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'User Interface', 'Action Link Templates', 'Actions & Recommendations', and 'App Menu'. The main content area is titled 'New User' and contains a 'User Edit' form. The form has two columns: 'General Information' and 'Role'. The 'General Information' column includes fields for First Name (Syethu), Middle Name, Last Name (navas), Suffix, Alias (snava), Email (seyadnavas786@gamil.com), Username (seyadnavas786@gamil.com), Nickname (nail), and Title. The 'Role' column includes fields for Role (On site emp), User License (Salesforce), Profile (Manager), Active (checked), Marketing User, Offline User, Sales Anywhere User, Flow User, and Accessibility Mode (Classic Only). The top of the page shows the 'Choose Your Tour' button, 'Leave Feedback' link, 'Days left in trial' (29), and 'Buy Now' button. The bottom of the page shows the Windows taskbar with the date 04-11-2023 and time 12:46.

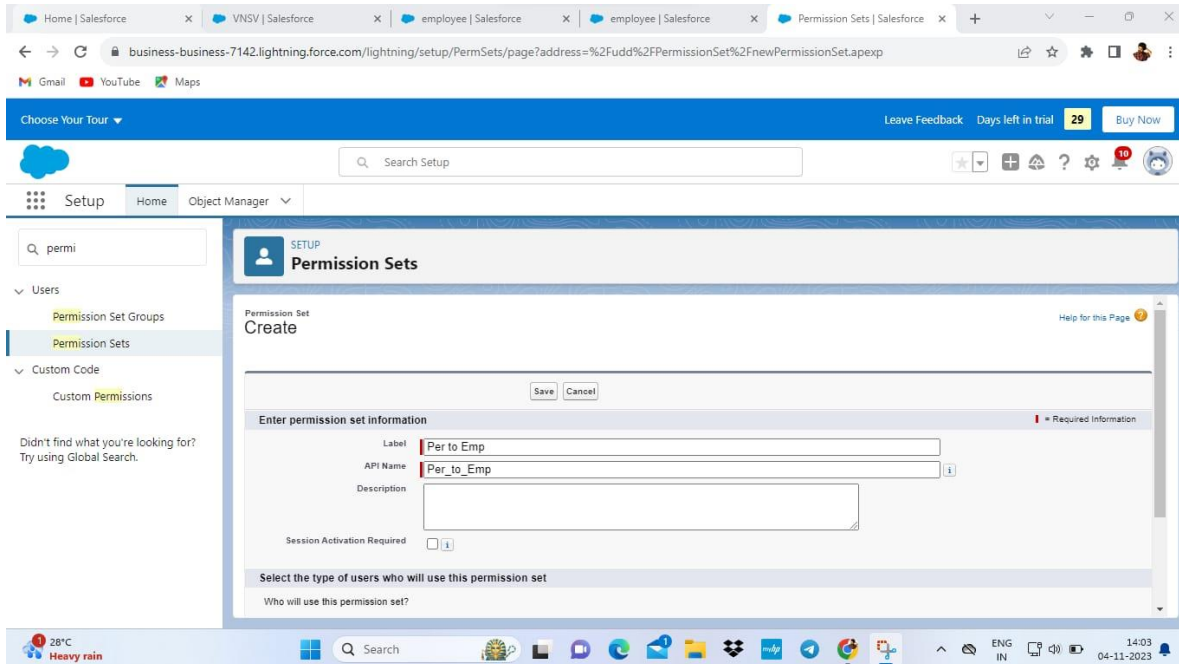
MILESTONE 12 : PAGE LAYOUT



The screenshot shows the Salesforce Setup interface for the 'Object Manager' section, specifically the 'Page Layouts' page. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', and 'Related Lookup Filters'. The main content area is titled 'Page Layouts' and contains a table with 2 items, sorted by Page Layout Name. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The table lists two page layouts: 'employee Layout' and 'On site employee layout'. The top of the page shows the 'Choose Your Tour' button, 'Leave Feedback' link, 'Days left in trial' (29), and 'Buy Now' button. The bottom of the page shows the Windows taskbar with the date 04-11-2023 and time 12:51.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
employee Layout	vinoth kannan, 02/11/2023, 2:57 pm	vinoth kannan, 04/11/2023, 10:29 am
On site employee layout	vinoth kannan, 04/11/2023, 12:49 pm	vinoth kannan, 04/11/2023, 12:50 pm

MILESTONE 13 : PERMISSINON SETS



The screenshot shows the Salesforce Setup interface for creating a new Permission Set. The left sidebar contains a search bar with 'permi' and a list of navigation items: Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and 'Create'. It features a 'Enter permission set information' section with fields for Label ('Per to Emp'), API Name ('Per_to_Emp'), and Description. Below this is a 'Session Activation Required' checkbox. A 'Select the type of users who will use this permission set' section is partially visible. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The bottom status bar shows the date '04-11-2023' and time '14:03'.

Choose Your Tour ▾ Leave Feedback Days left in trial 29 Buy Now

Search Setup

Setup Home Object Manager ▾

permi

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

Permission Set Create

Save Cancel

Enter permission set information

Label Per to Emp

API Name Per_to_Emp

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

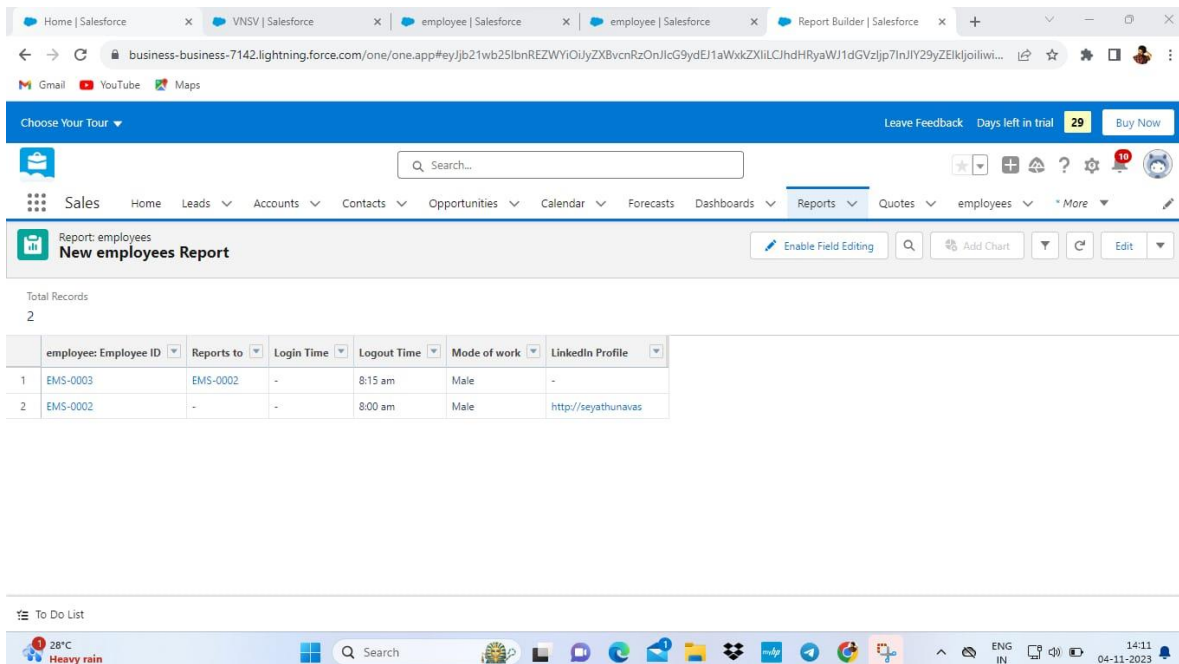
28°C Heavy rain

Search

ENG IN

14:03 04-11-2023

MILESTONE 14 : REPORTS



The screenshot shows the Salesforce Report Builder interface for a report titled 'New employees Report'. The top navigation bar includes 'Sales', 'Home', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Calendar', 'Forecasts', 'Dashboards', 'Reports' (selected), 'Quotes', and 'employees'. The report header shows 'Report: employees' and 'New employees Report'. Below the header is a table with 2 total records. The table columns are: employee: Employee ID, Reports to, Login Time, Logout Time, Mode of work, and LinkedIn Profile. The data rows show two employees: EMS-0003 and EMS-0002. The bottom status bar shows the date '04-11-2023' and time '14:11'.

Choose Your Tour ▾ Leave Feedback Days left in trial 29 Buy Now

Search...

Sales Home Leads ▾ Accounts ▾ Contacts ▾ Opportunities ▾ Calendar ▾ Forecasts Dashboards ▾ Reports ▾ Quotes ▾ employees ▾ More ▾

Report: employees

New employees Report

Enable Field Editing Add Chart

Total Records 2

	employee: Employee ID	Reports to	Login Time	Logout Time	Mode of work	LinkedIn Profile
1	EMS-0003	EMS-0002	-	8:15 am	Male	-
2	EMS-0002	-	-	8:00 am	Male	http://seyathunavas

To Do List

28°C Heavy rain

Search

ENG IN

14:11 04-11-2023

MILESTONE 15 : DASHBOARD

