

Workforce Administration Solution (Dev)

Project Description:

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.

What you'll learn

1. Real Time Salesforce Project
2. Data Modelling
3. Creating an Application
4. User Interface Customization
5. Importing bulk amounts of data
6. Security in Salesforce
7. Group Collaboration
8. Reports & 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.

****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.

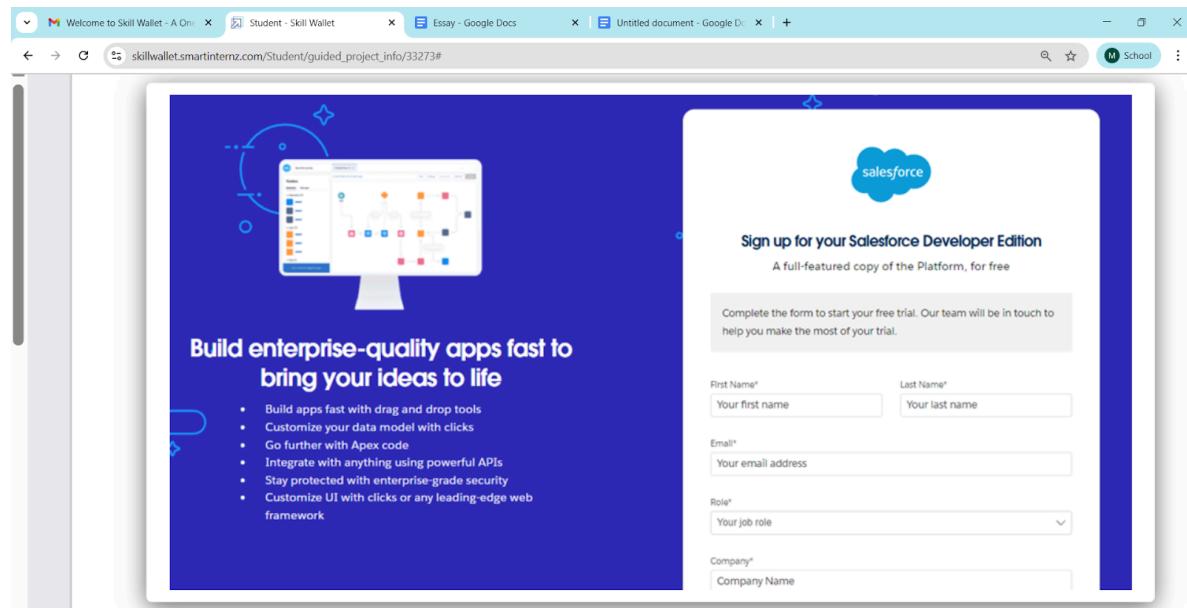
4	Unlimited	Maximizes your success and extends it across the entire enterprise through the Lightning Platform. It gives you new levels of platform flexibility for managing and sharing all your information on demand. Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.
5	Developer	Provides access to the Lightning Platform and APIs. It lets 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 :GEDELA

Last name:NARENDRA

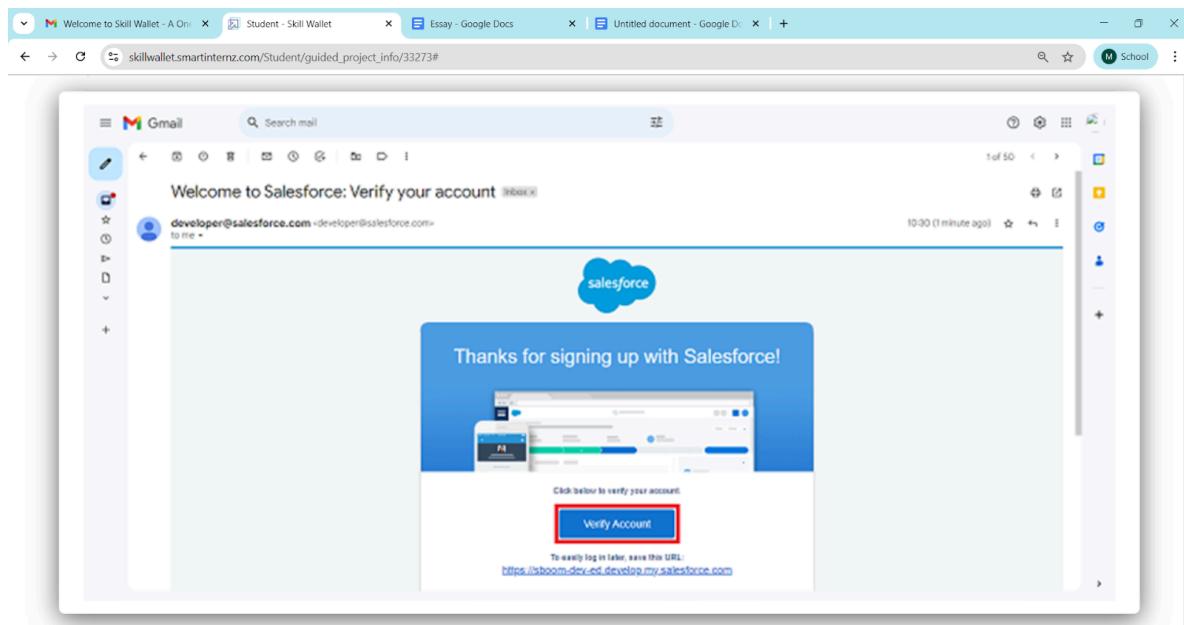
- 2) Email: 22kd1a0716@lendi.edu.in
- 3) Role : Student
- 4) Company : LENDI INSTITUTE OF ENGINEERING AND TECHNOLOGY
- 5) County : India
- 6) Postal Code : 535005
- 7) Username : 22kd1a0716351@agentforce.com
- 8) Click on Sign me up. <https://orgfarm-5f1271b6a8-dev-ed.develop.my.salesforce.com>

This 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.

Change Your Password

Enter a new password for lead@sb.oom.

Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

.....	Good
-------	------

* Confirm New Password

.....	Match
-------	-------

Security Question

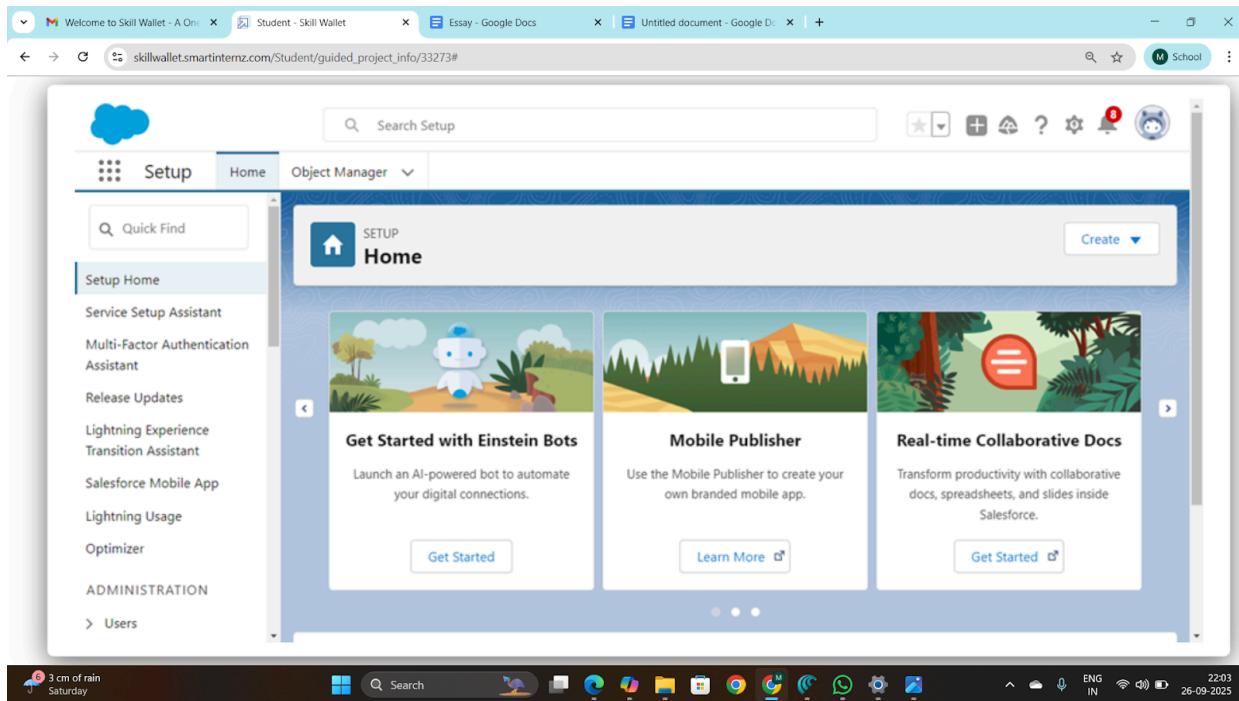
▼ In what city were you born?

* Answer

asdfghijkl

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:

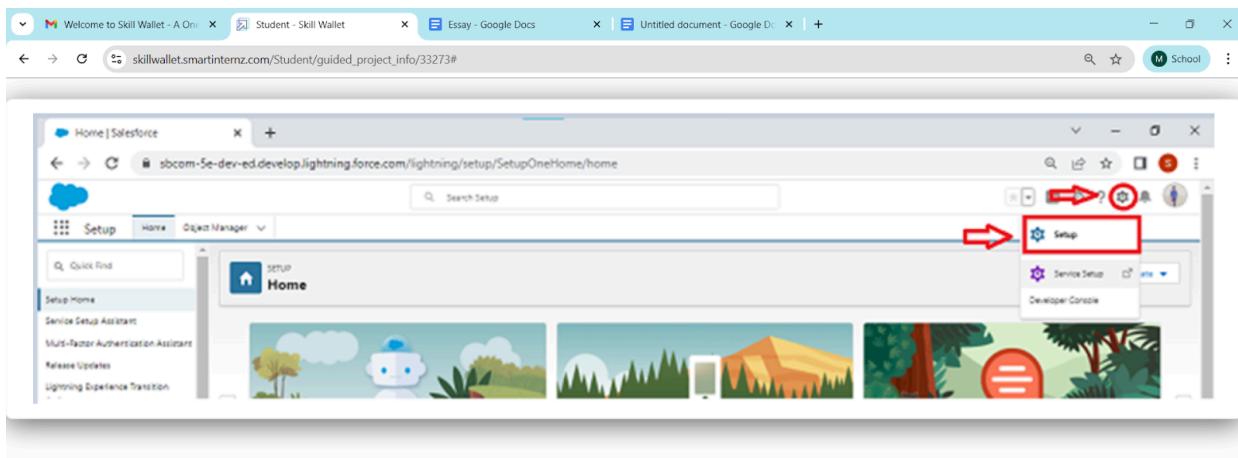
1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

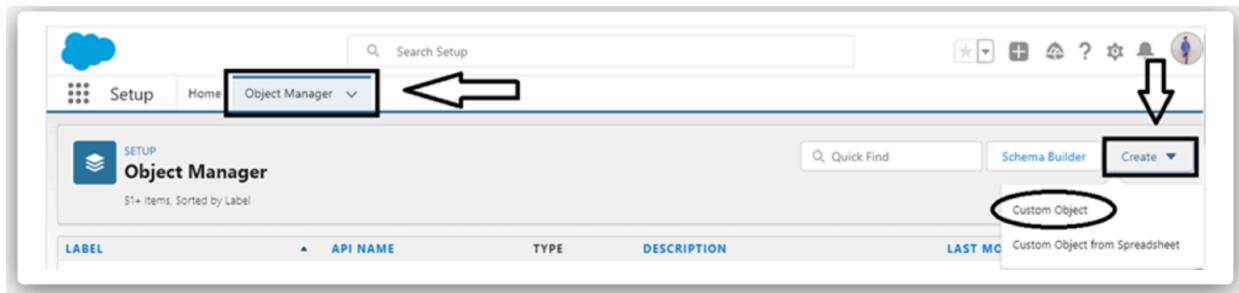


**** Activity 1: Create Employee Object**

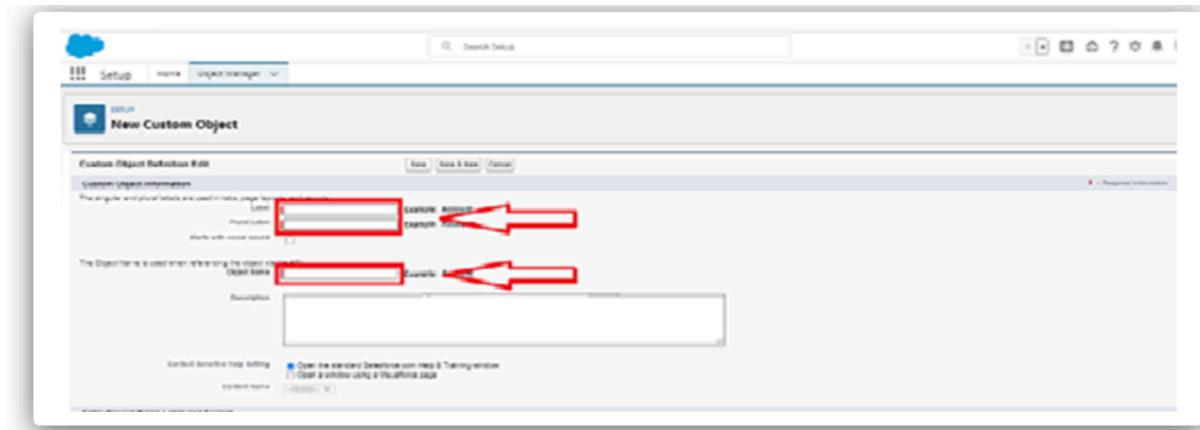
The purpose of creating an Employee custom object is to keep track the employee's activities and their individual and as well as team progress.

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

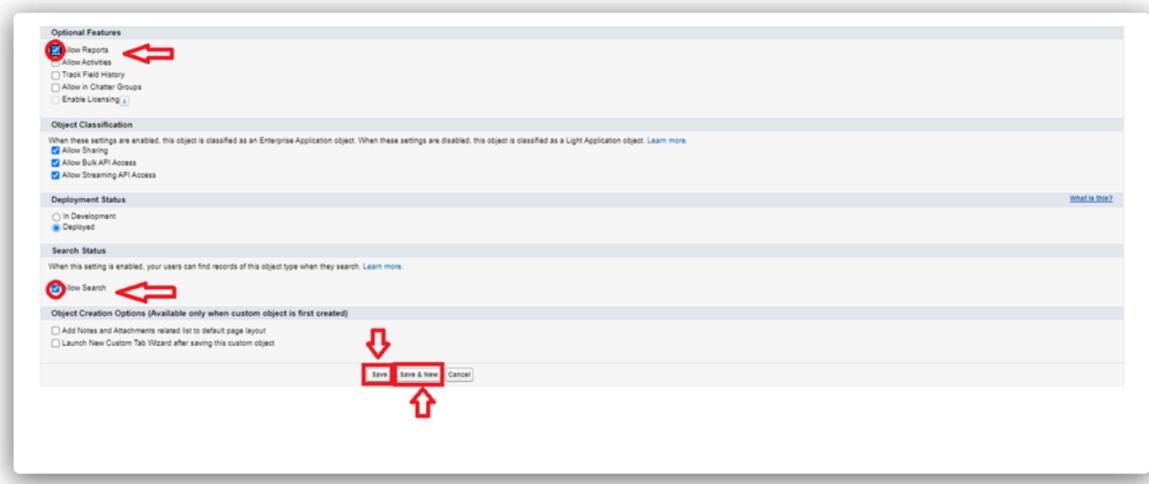
- 1 Record Name : Employee ID
- 2 Data Type : Auto Number
- 3 Display Format : EMS-{0000}
- 4 Starting Number : 1

Enter Record Name Label and Format

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

Record Name	<input type="text" value="Employee Id"/> Example: Account Name
Data Type	<input type="button" value="Auto Number"/>
Display Format	<input type="text" value="EMS-{0000"/> Example: A-{0000} What Is This?
Starting Number	<input type="text" value="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)

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external pages, such as Visualforce pages or third-party sites. Lightning Component tabs allow you to add Lightning components to the navigation bar. You can also add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs New [What Is This?](#)

No Custom Object Tabs have been defined

Web Tabs New [What Is This?](#)

No Web Tabs have been defined

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.

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

Object: --None-- Employee

Tab Style: --None-- Asset

(Optional) Choose a Home Page Custom Link: Project

Splash Page Custom Link: ProjectTask

Enter a short description

Description:

Next [Cancel](#)

****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

The screenshot shows the 'App Manager | Salesforce' interface. At the top, there are navigation tabs for 'Setup', 'Home', and 'Object Manager'. Below them is a search bar with the placeholder 'Search Setup'. On the left, there's a sidebar with buttons for 'App Manager', 'Apps', and 'Data Manager'. A red arrow points to the 'App Manager' button. In the center, the title 'Lightning Experience App Manager' is displayed above a sub-header 'Clone Apps (Beta)'. Another red arrow points to the 'Clone Apps (Beta)' link. To the right of the sub-header is a 'New Lightning App' button. A third red arrow points to this button. Below these, there's a note about cloning existing apps and enabling app cloning. At the bottom of the page is a table listing 33 items, sorted by app name, with columns for 'App Name', 'Developer Name', 'Description', 'Last Modified', 'App Type', and 'V...'. The table includes entries like 'All Tabs', 'Analytics Studio', 'App Launcher', etc.

2. Fill the app name in app details and branding as follow

App Name : Workforce Administrator Solution

Developer Name : this will auto populated

Description : Give a meaningful description

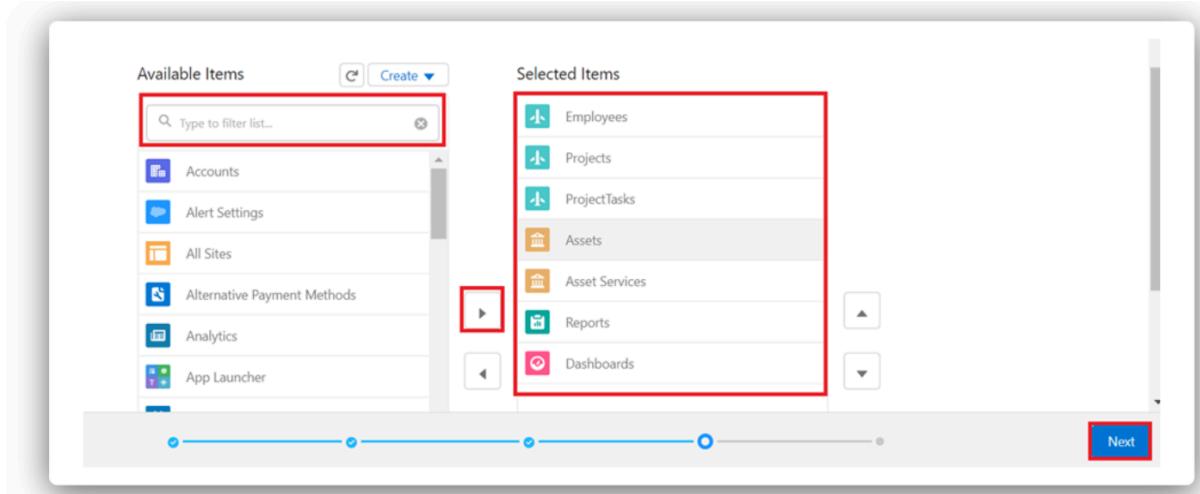
Image : optional (if you want to give any image you can otherwise not mandatory)

Primary color hex value : keep this default

3. Then click Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.

The screenshot shows the 'New Lightning App' configuration page. It has two main sections: 'App Details' and 'App Branding'. In the 'App Details' section, there are fields for 'App Name' (with a placeholder 'Name your app...'), 'Developer Name' (with a placeholder 'Enter a developer name...'), and 'Description' (with a placeholder 'Enter a description...'). A red arrow points to the 'App Name' field. In the 'App Branding' section, there's a 'Primary Color Hex Value' field set to '#007002', a 'Upload' button for an image, and a checkbox for 'Org Theme Options'. Below these sections is an 'App Launcher Preview' area showing a small preview of the app icon. At the bottom right of the page is a large blue 'Next' button, which is also highlighted with a red arrow.

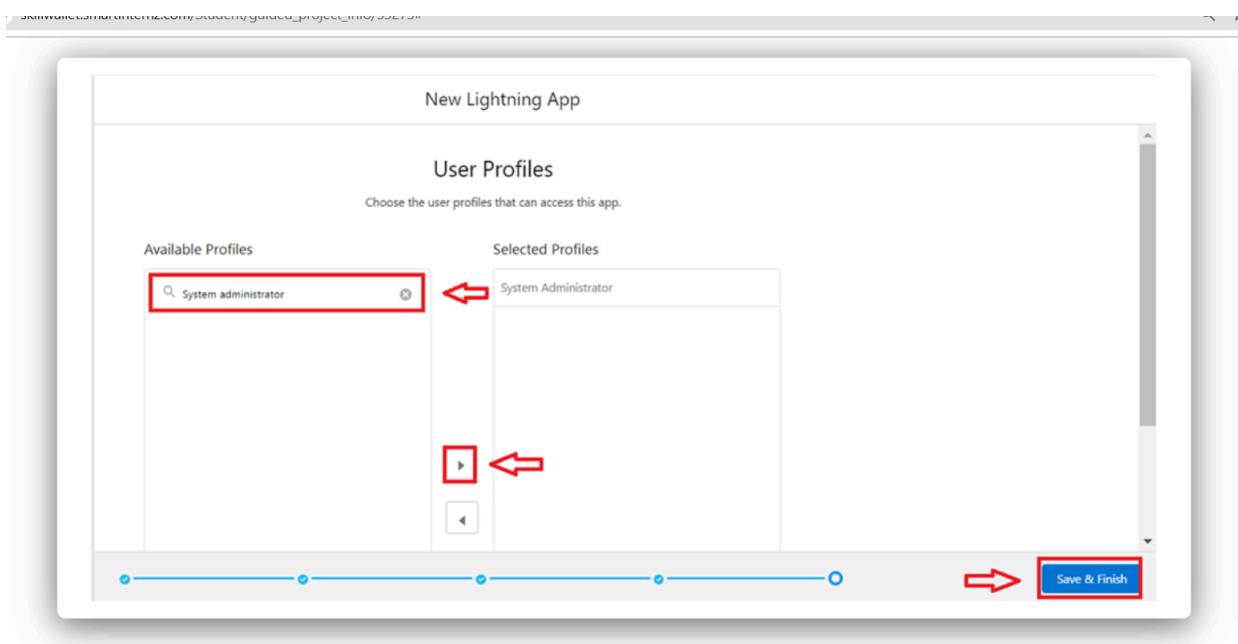
4. To Add Navigation Items:



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 Setup interface. In the top navigation bar, the 'Object Manager' tab is selected, indicated by a red box and an arrow. Below the navigation bar, there is a search bar with the text 'Employee' highlighted by a red box and an arrow. The main area displays a table for the 'Object Manager'. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. A single row is visible for the 'Employee' object, which is a 'Custom Object'. The 'LABEL' column shows 'Employee', the 'API NAME' column shows 'Employee_c', and the 'TYPE' column shows 'Custom Object'. The 'LAST MODIFIED' column shows '20/06/2023' and the 'DEPLOYED' column shows a checkmark.

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

The screenshot shows the 'Object Manager' screen for the 'Employee' object. On the left, there is a sidebar with options: Details, Fields & Relationships (highlighted with a red box and an arrow), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Compact Layouts. The main area is titled 'Fields & Relationships' and shows a table of existing fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: 'Created By' (CreatedById, Lookup(User)), 'Employee ID' (Name, Auto Number), 'Last Modified By' (LastModifiedById, Lookup(User)), and 'Owner' (OwnerId, Lookup(User,Group)). At the top of the table, there is a 'New' button highlighted with a red box and an arrow.

3. Select Data type as “Text”.

The screenshot shows a list of data types for a new field. The options are: Picklist, Picklist (Multi-Select), Text (highlighted with a red box and an arrow), Text Area, and Text Area (Long). Each option has a description: Picklist allows users to select a value from a list you define; Picklist (Multi-Select) allows users to select multiple values from a list you define; Text allows users to enter any combination of letters and numbers; Text Area allows users to enter up to 255 characters on separate lines; and Text Area (Long) allows users to enter up to 131,072 characters on separate lines.

4. Click on Next

Employee
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label Employee Name ←

Length 18 ←

Field Name Employee_Name

Description

Previous Next ← cancel

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

Field Label ←

Field Name ←

Auto add to custom report type Add this field to existing custom report types that contain this entity [\[?\]](#)

Formula Return Type

None Selected Select one of the data types below.

Checkbox Calculate a boolean value
Example: `TODAY() > CloseDate`

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

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

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

Number Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius_c + 32` ←

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

Step 3. Enter formula

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

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

Simple Formula Advanced Formula ←

Insert Field

Age (Number)
`YEAR(TODAY()) - YEAR(Date_of_Birth_c)` ←

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

Functions

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Description

**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	<input type="text" value="Gender"/>
Values	<input type="radio"/> Use global picklist value set <input checked="" type="radio"/> Enter values, with each value separated by a new line <div style="border: 1px solid black; padding: 5px; background-color: #f9f9f9;"> Male Female </div>
<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	<input type="text" value="Gender"/>
Description	<input type="text"/>
Help Text	<input type="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 <input type="text" value="Employee"/>

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	Employee	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 <div style="border: 1px solid black; padding: 5px; display: inline-block;"> On Site Remote </div>
		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

		<table border="1"> <tr> <td>13</td><td>Wifi Allowance Amount</td><td>Currency</td></tr> <tr> <td>14</td><td>Login Time</td><td>Time</td></tr> <tr> <td>15</td><td>Logout Time</td><td>Time</td></tr> <tr> <td>16</td><td>LinkedIn Profile</td><td>url</td></tr> </table>	13	Wifi Allowance Amount	Currency	14	Login Time	Time	15	Logout Time	Time	16	LinkedIn Profile	url
13	Wifi Allowance Amount	Currency												
14	Login Time	Time												
15	Logout Time	Time												
16	LinkedIn Profile	url												
2	Project	<table border="1"> <thead> <tr> <th>Field Name</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>1 Project Name</td><td>Text</td></tr> <tr> <td>2 Project Lead</td><td>Text</td></tr> <tr> <td>3 Start Date</td><td>Date</td></tr> <tr> <td>4 End Date</td><td>Date</td></tr> <tr> <td>5 Project Status</td><td>Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Completed On Going Not Yet Started </div> </td></tr> </tbody> </table>	Field Name	Data type	1 Project Name	Text	2 Project Lead	Text	3 Start Date	Date	4 End Date	Date	5 Project Status	Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Completed On Going Not Yet Started </div>
Field Name	Data type													
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		<table border="1"> <thead> <tr> <th>Field Name</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>1 Project Task</td><td>MDR with project object</td></tr> <tr> <td>2 Finishes in</td><td>Formula : (Project_Task__r.Start_Date__c - Project_Task__r.End_Date__c) Formula return type: Number Numbers</td></tr> <tr> <td>3 Working Hours</td><td>Master Detail relationship with Employee object</td></tr> <tr> <td>4 Employee Name</td><td></td></tr> </tbody> </table> <p>Note: here in Finishes in field, Start Date and End Date belong to Employee Object.</p>	Field Name	Data type	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			
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4	Asset Service	<table border="1"> <thead> <tr> <th>Field Name</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>1 Asset Id</td><td>Lookup relationship with Asset object</td></tr> <tr> <td>2 Type</td><td>Picklist: Values Technical Issue Non Technical Issue</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> </tbody> </table>	Field Name	Data type	1 Asset Id	Lookup relationship with Asset object	2 Type	Picklist: Values Technical Issue Non Technical Issue	3 Technician	Text	4 Subject	Text Area	5 Description	Text Long
Field Name	Data type													
1 Asset Id	Lookup relationship with Asset object													
2 Type	Picklist: Values Technical Issue Non Technical Issue													
3 Technician	Text													
4 Subject	Text Area													
5 Description	Text Long													

		Field Name	Data type
5	Asset	1 Asset Type	Picklist: Values Laptop Charger Mouse Monitor CPU
		2 Model Name	Text
		3 Employee Name	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.

The screenshot shows the Salesforce Sharing Settings page. In the top-left corner, there's a search bar with the text "sharing settings" and a red box highlighting it. Below the search bar, under the "Security" section, there's a link labeled "Sharing Settings" with a red box highlighting it. On the right side of the page, there's a table titled "Organization-Wide Defaults" with a red box highlighting the "Edit" button in the header row. The table lists various objects (Lead, Account and Contract, Contact, Order, Asset, Opportunity) and their corresponding default internal and external access levels.

Object	Default Internal Access	Default External Access
Lead	Public Read/Write/Transfer	Private
Account and Contract	Public Read/Write	Private
Contact	Controlled by Parent	Controlled by Parent
Order	Controlled by Parent	Controlled by Parent
Asset	Controlled by Parent	Controlled by Parent
Opportunity	Public Read/Write	Private

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	Object	OWD	Sharing Options
Asset	Asset	Public Read/Write	Private
Asset Service	Asset Service	Public Read/Write	Private
Employee	Employee	Private	Private
Project	Project	Public Read/Write	Public Read/Write

Other Settings

Standard Report Visibility Manual User Record Sharing Manager Groups

Save **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**

"User adoption is the cornerstone of Salesforce success. By empowering users through training, customizing the platform to meet their needs, and fostering a culture of feedback and continuous improvement, organizations can unlock the full potential of Salesforce and drive meaningful business outcomes."

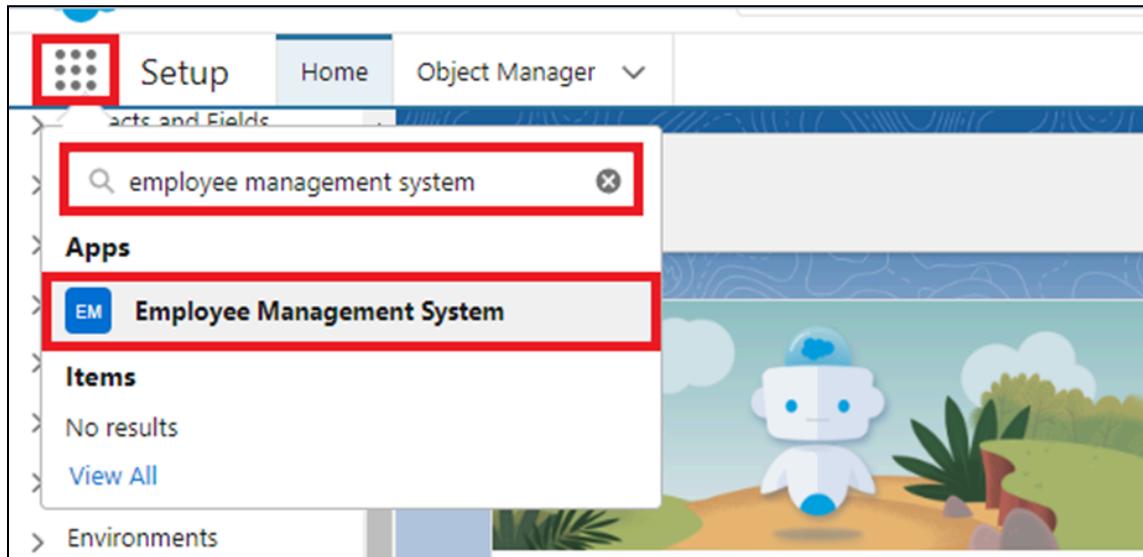
****Use Case:**

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.

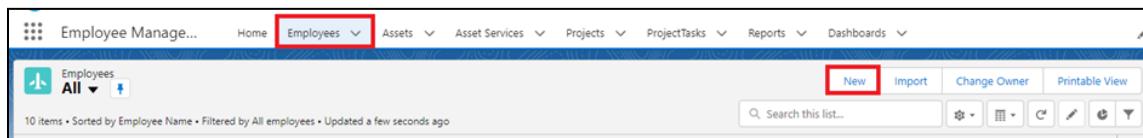
****Activity 1: Create a Record (Employee)**

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**

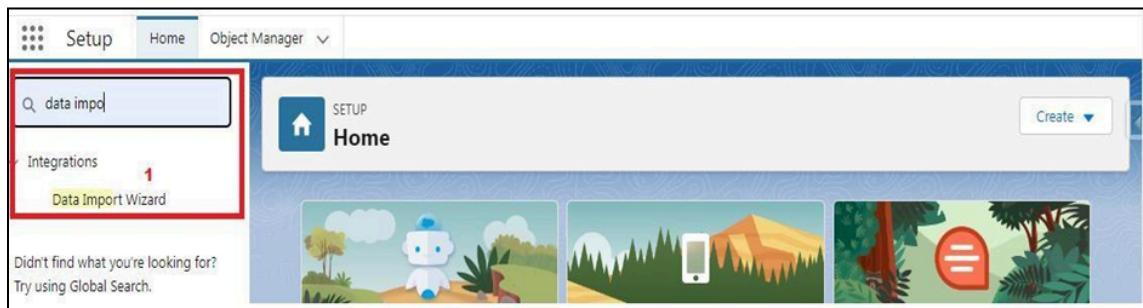
Congrats you have successfully made an app with all the default settings for the organization. Now here comes the real admin work, to import the old data of TheSmartBridge organization which was in CSV format into the salesforce org without failing any of the record.

Note in real time you might also facing some additional task such as data cleaning, elimination of duplicate values or records, etc.,

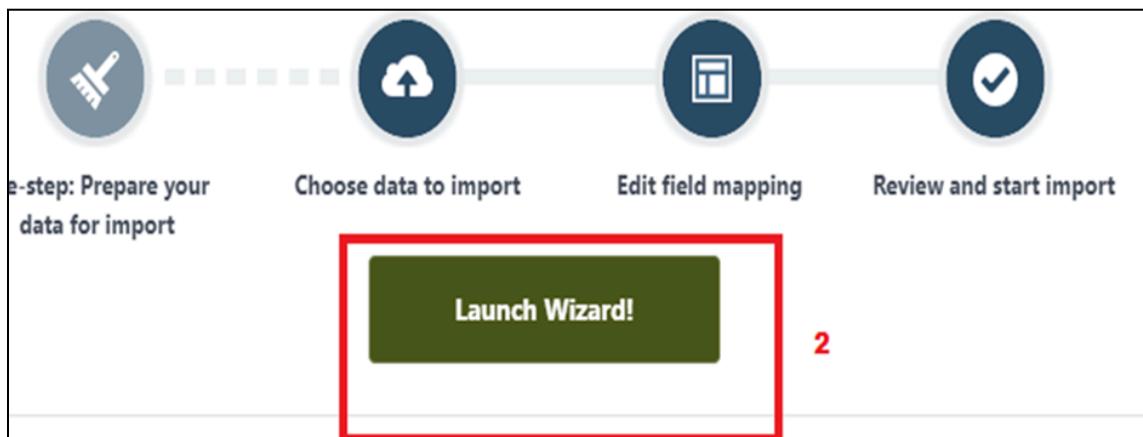
**** Activity-1: Importing data using Data Wizard**

1. From Setup, click the Home tab.

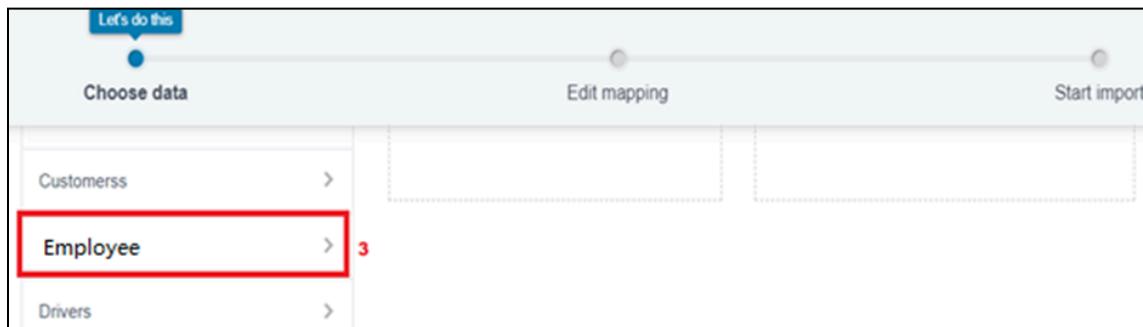
2. In the Quick Find box, enter Data Import and select Data Import Wizard.



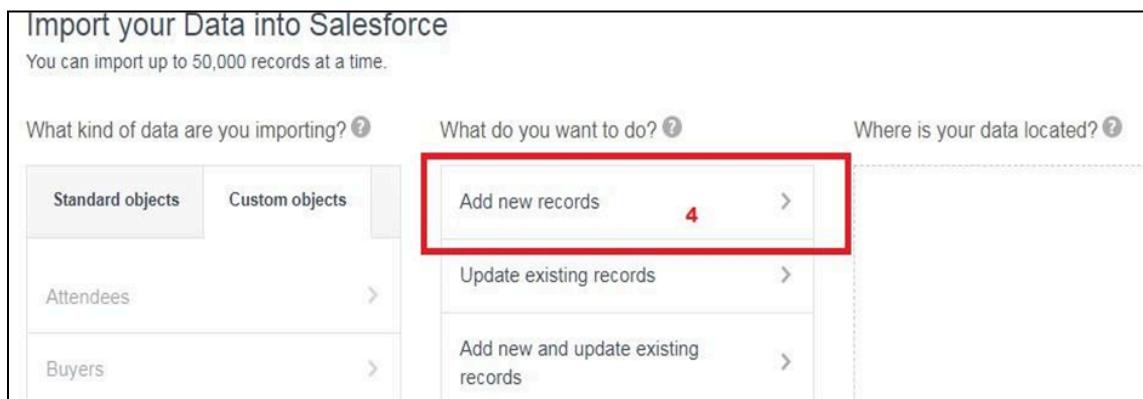
3. Click Launch Wizard!



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



5. Select Add new records.



6. Click CSV and choose file Employee_CS1 which we made earlier. Click Next.

Choose data

What kind of data are you importing? Standard objects Custom objects

Attendees Buyers Customers Departments

What do you want to do? Add new records ✓

Match by: None

Which User field in your file designates record owners? None

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

Where is your data located? Drag CSV file here to upload

CSV

Cancel Previous Next

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

Setup Home Object Manager

Almost done

Choose data Edit mapping Start Import

Edit Field Mapping: Employees

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Employee Name	Employee Name	Jackie Chan	James	Benjamin
Change	Date of Birth	Date of Birth	01/01/1993	27/02/1998	16/03/1999
Change	Gender	Gender	Male	Male	Male
Change	Qualification	Qualification	B.Tech	B.Tech	B.Com
Change	Address	Address			
Change	Experience	Experience	9	6	5
Change	Phone no	Phone no	7995434750	7995434751	7995434752

Cancel Previous Next

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

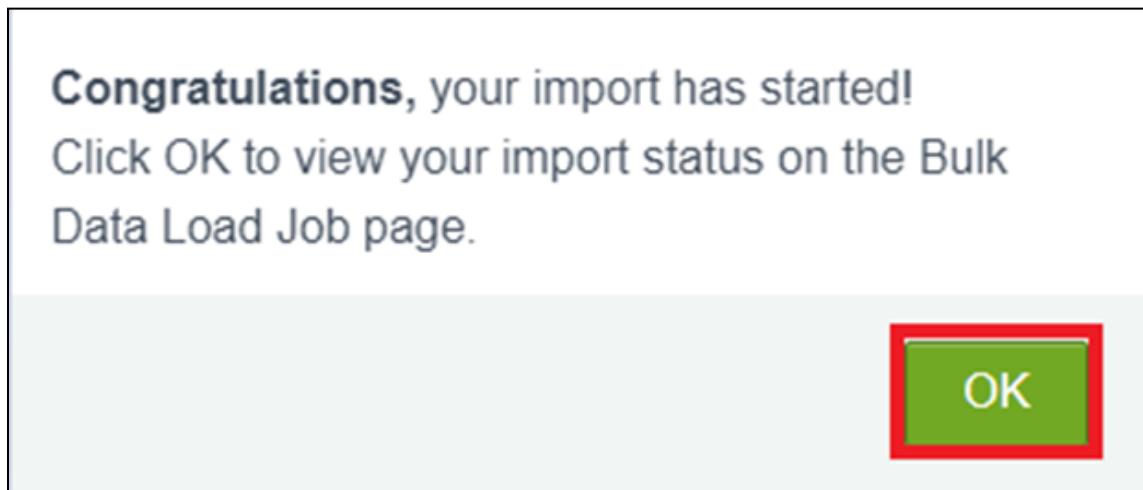
8. The next screen gives you a summary of your data import. Click Start Import.

The screenshot shows the 'Review & Start Import' step of the data loader. At the top, there's a progress bar with three steps: 'Choose data', 'Edit mapping', and 'Start import'. The 'Start import' step is highlighted with a blue dot. Below the progress bar, there's a section titled 'Review & Start Import' with the sub-instruction 'Review your import information and click Start Import.' There are three main sections in this review area:

- Your selections:** Shows 'Employees' checked and 'Add new records' checked. Below it, 'Employee - Data - Employee - Data.csv' is listed with a checkmark.
- Your import will include:** Shows 'Mapped fields' with the value '19'.
- Your import will not include:** Shows 'Unmapped fields' with the value '0'.

At the bottom right of the review area, there are buttons for 'Cancel', 'Previous', and a large green 'Start Import' button, which is also highlighted with a red box.

9. Click OK on the popup.



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

Batches												
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751500000JeYH4	14/06/2023, 11:54 am	14/06/2023, 11:54 am	105	60	0	14	0	0	Completed	

11. Make sure you have 0 records under the records failed column.

→**Profiles**

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

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

We cannot 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"/>

Save **Cancel**

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

	Basic Access						Data Administration
	Read	Create	Edit	Delete	View All	Modify All	
Assets	<input checked="" type="checkbox"/>						
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

	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. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has a search bar ('Q: roles') and a tree view with categories like 'Users' (highlighted with a red box), 'Feature Settings', 'Sales' (with 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'), 'Service', and 'Case Teams'. Under 'Case Teams', 'Case Team Roles' and 'Contact Roles on Cases' are listed. A note at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'SETUP Roles' and features a 'Sample Role Hierarchy' diagram. The hierarchy starts with 'Executive Staff' (CEO, President, CFO, VP, Sales) which can 'View & edit data, roll up records, & generate reports for all users below or at same level of other Executive Staff'. It branches down to 'Western Sales' (Director of W. Sales) and 'Eastern Sales' (Director of E. Sales). 'Western Sales' further branches to 'Western Sales Rep' (CA Sales Rep, OR Sales Rep) who can 'View & edit data, roll up records, & generate reports for all users below or at same level of users above or at same level'. 'Eastern Sales' branches to 'Eastern Sales Rep' (NY Sales Rep, MA Sales Rep) who also have the same permissions. To the right of the hierarchy, there is descriptive text for each level. At the bottom right of the main content area is a 'Set Up Roles' button and a checkbox for 'Don't show this page again'.

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

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

- ☐ Nick Enterprises
 - ⋮ Add Role
 - ☐ CEO [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

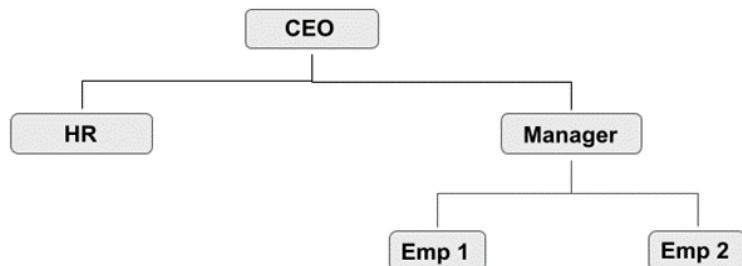
Role Name [\[i\]](#)

This role reports to [\[i\]](#)

Role Name as displayed on reports

[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, containing fields for First Name, Last Name, Alias, Email, Username, and Nickname. The 'Role' field is also highlighted with a red box, set to 'HR'. The 'User License' field is set to 'Salesforce'.

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 are tabs for Setup, Home, and Object Manager, with Object Manager selected. A search bar is present, and a red box highlights the search term "Employee". Below the search bar is a "Create" button. The main area displays a table with one item: Employee, Employee__c, Custom Object. The last modified date is 31/05/2023. On the far right of the row, there is an "Edit" button, which is also highlighted with a red box.

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

The screenshot shows the Page Layouts page for the Employee object. The title is "SETUP > OBJECT MANAGER Employee". There are tabs for Details, Fields & Relationships, and Page Layouts, with Page Layouts highlighted by a red box. The main area shows a table with one item: Employee Layout, created by Nick on 28/05/2023 at 7:34 pm, last modified by Nick on 31/05/2023 at 11:21 am. A "New" button is located in the top right corner of the table area, highlighted with a red box. A "Page Layout Assignment" link is also visible.

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

The screenshot shows the "Create New Page Layout" dialog. It includes a note about cloning layouts. The "Existing Page Layout" dropdown is set to "Employee Layout" and is highlighted with a red box. The "Page Layout Name" input field contains "On Site Employee Layout" and is also highlighted with a red box. At the bottom are "Save" and "Cancel" buttons, with "Save" highlighted with a red box.

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.

Section	Cab Allowance	Email	Food Allowance Am...	Last Modified By	Mode of Work	Reports to
Blank Space	Cab Allowance Amount	Employee ID	Food Allowances	LinkedIn Profile	Owner	Wifi Allowance Am...
Address	Created By	Employee Name	Gender	Login Time	Phone no	Wifi Allowances
Age	Date of Birth	Experience	Joining date	Logout Time	Qualification	

Information (Header visible on edit only)			
Employee ID	GEN-2024-001234	Owner	Sample Text
Employee Name	Sample Text	Reports to	Sample Text
Gender	Sample Text	Qualification	Sample Text
Experience	Sample Text	Phone no	1-415-555-1212
Email	sarah.sample@company.com	Mode of Work	Sample Text
Joining date	21/05/2023	Login Time	Sample Text
LinkedIn Profile	www.salesforce.com	Logout Time	Sample Text

Personal Information			
Date of Birth	21/05/2023	Age	50.12
Address	Sample Text		

Allowances			
Cab Allowance	<input checked="" type="checkbox"/>	Cab Allowance Amount	₹123.45
Food Allowances	<input checked="" type="checkbox"/>	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

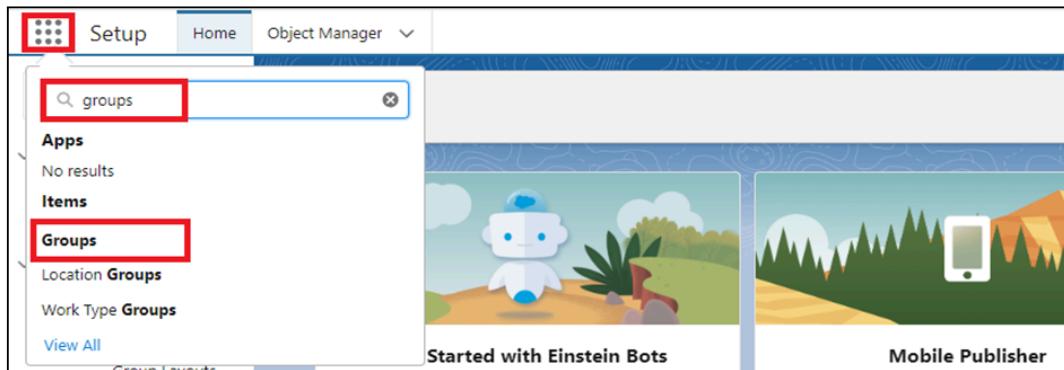
Congratulations Admin you have made the job done for the organization, Amar The Founder of the organization and Jai Prakash The COO are very impressed with your work. But still there are some updates which your COO wants in your organization. So he comes to you with the idea that all the employees should have a common group for

work discussion inside the salesforce. You know how to get this done with your admin skills.

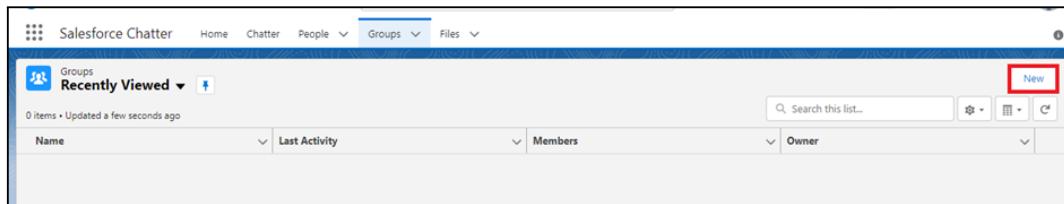
****Activity 1 : Creating a chatter group for your organization.**

To Create a chatter group:

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

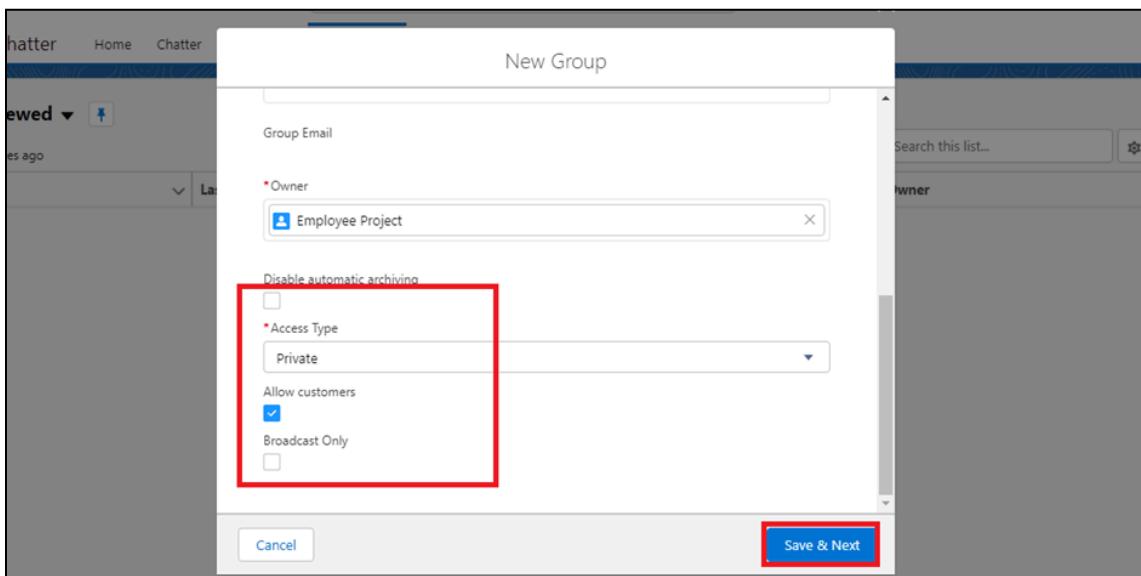
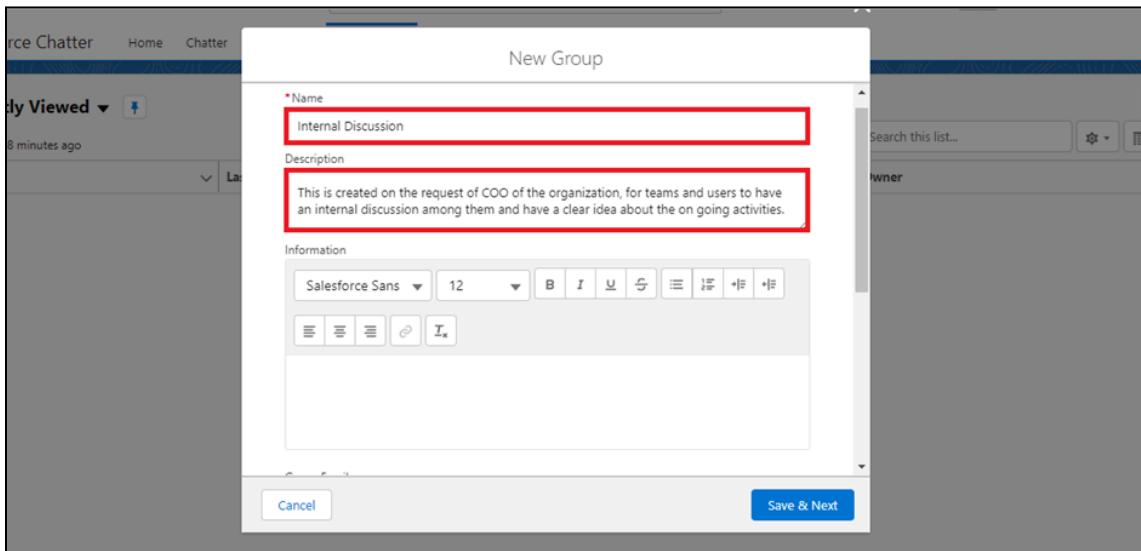


3. Click New.



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

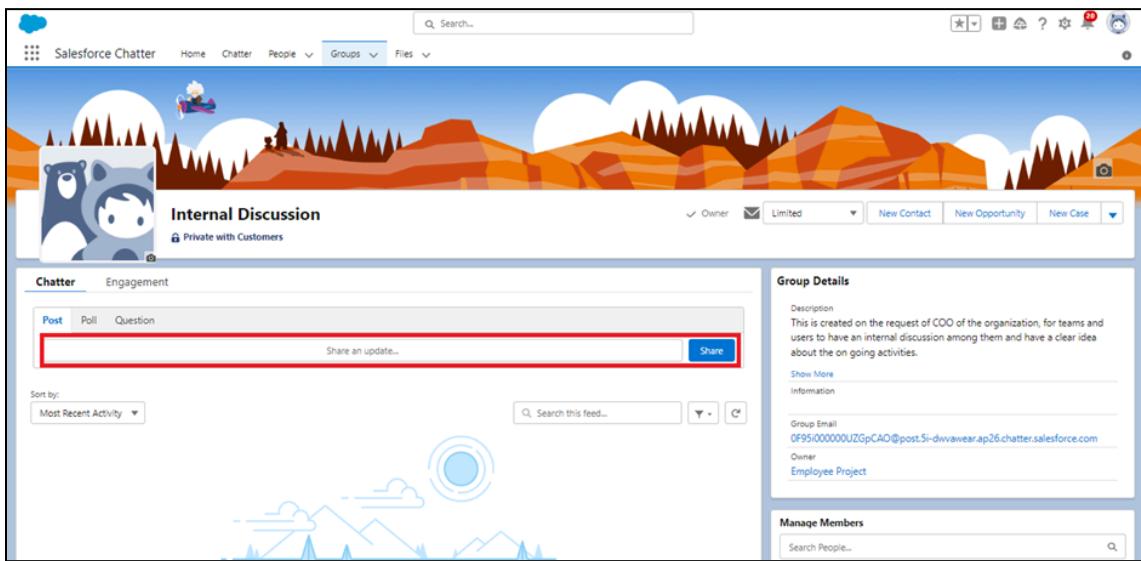
Search People...

User	Status
Jason Mikaelson	X Member
Elijah Mikaelson	X Member
Kol Mikaelson	X Member
Niklaus Mikaelson	+ Add

Done

The screenshot shows a user interface for managing team members. At the top, it says "Manage Members". Below that is a search bar labeled "Search People...". Underneath the search bar is a list of four users, each with a small profile icon and a name: Jason Mikaelson, Elijah Mikaelson, Kol Mikaelson, and Niklaus Mikaelson. To the right of each name is a status indicator: "Member" with a dropdown arrow and an "X" button. The "Niklaus Mikaelson" row has a red box around it, specifically around the "+ Add" button. At the bottom right of the main area is a blue "Done" button with a red border.

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 navigation is a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. A single row is visible for 'Employee' (API Name: Employee__c, Type: Custom Object). At the bottom right of the table are 'Edit' and 'Delete' buttons, both highlighted with red boxes.

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

The screenshot shows the 'Record Types' page for the 'Employee' object. The top navigation bar includes 'Setup > OBJECT MANAGER' and 'Employee'. The left sidebar has links for 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', and 'Record Types'. The 'Record Types' link is highlighted with a red box. The main content area shows a table titled 'Record Types' with columns: RECORD TYPE LABEL, DESCRIPTION, ACTIVE, and MODIFIED BY. A note at the bottom states 'No items to display.' A 'New' button in the top right corner is also highlighted with a red box.

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

New Record Type
Employee

Step 1. Enter the details Step 1 of 2

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:

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	Make Available	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	Make Available	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: Analytics Cloud Integration User Page Layout: <input type="radio"/> Employee Layout <input type="radio"/> Employee Layout	

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
Lead 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

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 has 'Setup' and 'Home' buttons, with 'Setup' highlighted. Below the navigation is a search bar labeled 'Search Setup'. The main content area is titled 'Permission Sets' under the 'SETUP' tab. On the left, there's a sidebar with 'Q. Permission sets' and 'Users' sections, where 'Permission Sets' is also highlighted. The main pane displays a table titled 'Permission Sets' with a heading row. A red box highlights the 'New' button in the top-left corner of the table. The table lists several permission sets, each with a checkbox for 'Action', a 'Permission Set Label' column (e.g., 'Adding_Employee', 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', 'Contact Center Agent'), a 'Description' column, and a 'License' column. The 'Description' column for 'Buyer' states: 'Allows access to the store. Lets users see products and categories, ... B2B Buyer Permission Set One Seat'. The 'License' column for 'Buyer' is 'B2B Buyer Permission Set One Seat'. Other rows show similar descriptions and licenses for other permission sets like 'Buyer Manager', 'CRM User', etc.

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

Permission Set
Create

Enter permission set information

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

Save Cancel

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

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

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 left, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. On the left, a sidebar lists 'Users', 'Permission Set Groups', 'Permission Sets', 'Custom Code', and 'Custom Permissions'. The main area is titled 'Adding Employee' under 'PERMISSION SET: ADDING EMPLOYEE'. Below it, a section titled 'Current Assignments' shows two small icons: a cloud and a gear. In the top right corner of this section, there is a red box around the 'Add Assignment' button.

8. Click on Add Assignment.

The screenshot shows a modal dialog titled 'Select Users to Assign'. At the top left is a 'User' icon and a dropdown menu showing 'All Users'. Below is a table with columns: 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. One row for 'Chatter Expert' is shown. Then, a row for 'demo project' is shown. Finally, a row for 'Elijah Mikaelson' is highlighted with a red box. This row includes columns for 'Profile' (On Site Employee), 'Active' (checked), and 'Profile' (On Site Employee). At the bottom left is a 'Cancel' button, and at the bottom right is a 'Next' button, which is also highlighted with a red box.

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.

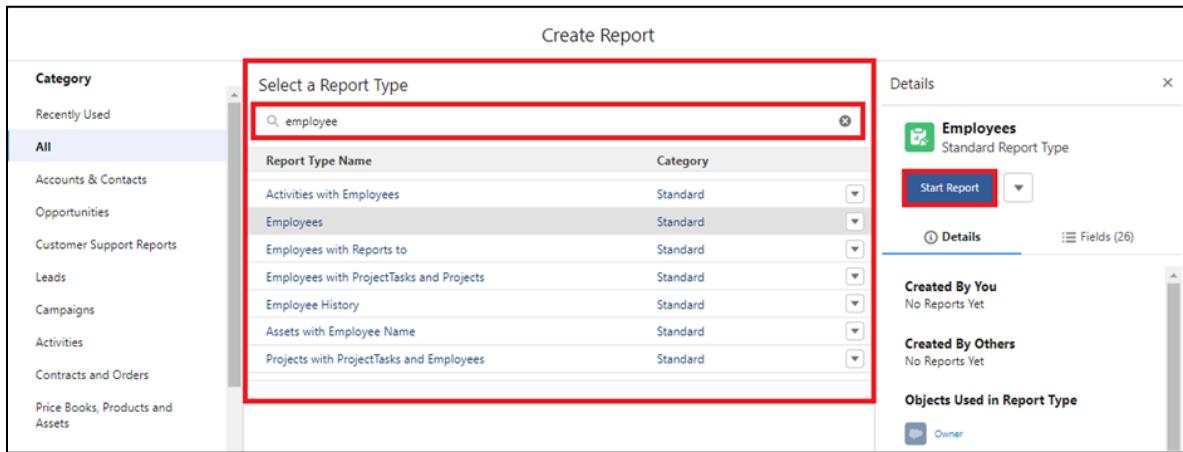
** Activity 1: Create Report

To Create a Report:

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

Report Name	Description	Folder	Created By	Created On	Subscribed
Employee's working on projects report	Private Reports	Employee Project	5/6/2023, 9:33 am		
Assets assigned to Employees	Private Reports	Employee Project	5/6/2023, 9:36 am		

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

Employee Name	Employee ID	Reports to	Login Time	Logout Time	Mode of Work	LinkedIn Profile
Employee 1	A0000000HFBP	-	-	-	-	http://linkdin.com
Employee 2	A0000000HGVY	-	8:00 am	5:00 pm	-	http://linkdin.com

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.

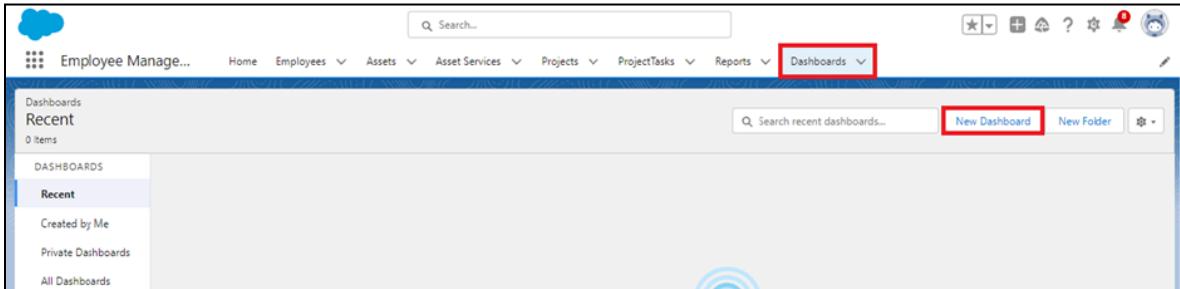
** Use Case

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

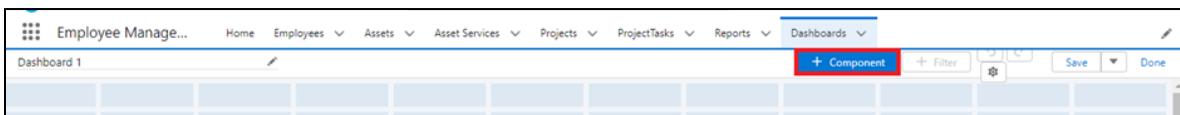
1. Go to the app --> click on the Dashboards tabs.



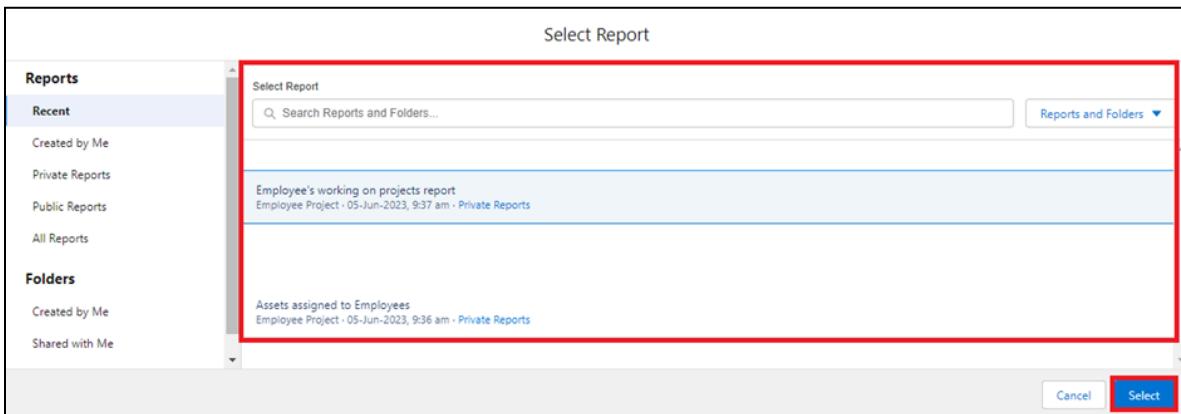
2. Give a Name and click on Create.

A screenshot of a "New Dashboard" creation dialog. It has fields for "Name" (containing "Dashboard 1"), "Description" (empty), "Folder" (set to "Private Dashboards" with a "Select Folder" button), and two buttons at the bottom: "Cancel" and "Create" (highlighted with 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.

→Approval Process

Use Case:

The Hiring Manager (HR) at TheSmartBridge wants to track the leave applications for each and every employee of the company. His requirement is the no leave application with more than 5 days of leave should come to him but automatically get submitted to the Employee Manager. If the leave application is more than 5 days then only his approval is needed.

As an Admin to TheSmartBridge you know what to do in order to achieve this requirement.

****Activity 1**

Prerequisites:

Create the leave object with the following fields.

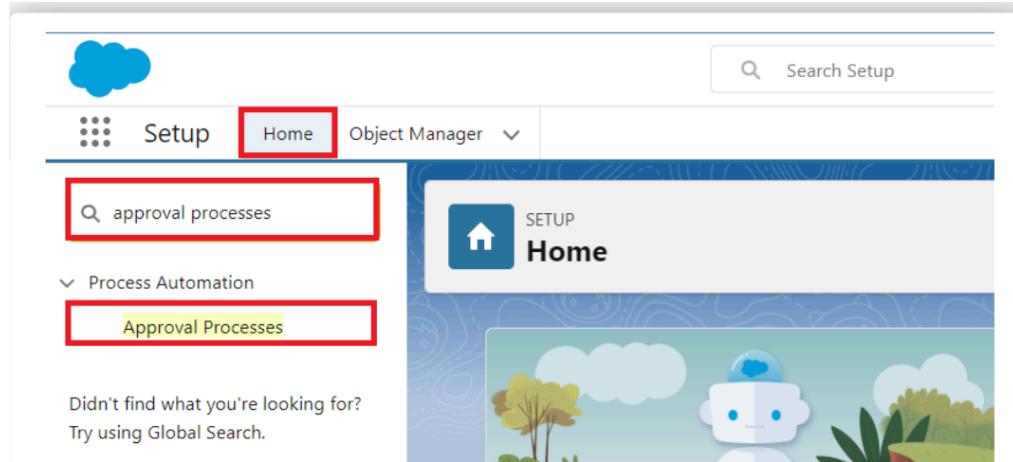
Object	Fields	Datatype
Leave	Employee Name No. of Days Subject Description Status	Lookup with Employee object Number Text Text Area(Rich) Picklist: values as follows Submitted Approved Rejected Note: Make sure the Status field is read only for everyone. (Give read only permission in step 3 while creating the field)

Create the tab for the leave object.

**Activity 2

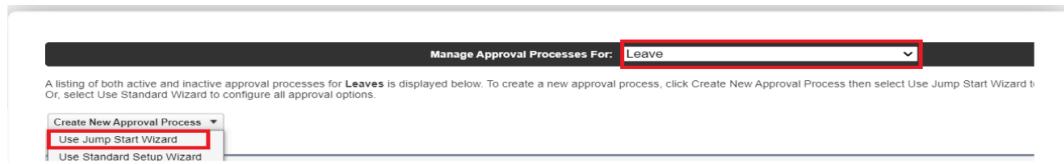
Create an Approval Process for Leave object.

1. Go to Setup --> type Approval Processes in quick find --> click on Approval Processes.



2. In the Manage Approval Processes For list, select Leave.

3. Click Create New Approval Process and select Use Jump Start Wizard.



4. Enter the following parameters

Parameter	Value
Name	Leave Approval Request
Unique Name	Leave_Approval_Request(This automatically gets sent when you tab out of the Name field)
Approval Assignment Email Template	Leave blank
Add the Submit for Approval button and Approval History related list to all Travel Approval page layouts	Leave this selected/checked
Use Approver Field of Leave Owner	Leave unselected/unchecked.
Select Approver	select Automatically assign to approver(s) and for users select the name of the user with the Manager role.

Add a screenshot here

5. Click Save.
6. Click View Approval Process Detail Page.

**Activity 3

Initial Submission Action:

1. Under initial submission action click on add new and then select field update.



2. Give name as "Approval Status to Submitted".
Select Status for the field to update.
Under specify new field value select "A specific value" and select submitted and click

Save.

Edit Field Update
Approval Status to Submitted

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update. Fields are shown only for the type that you select.

Field Update Edit

Identification

Name: Approval Status to Submitted
Unique Name: Approval_Status_to_Submit

Description:

Object: Leave
Field to Update: Status

Field Data Type: Picklist
Re-evaluate Workflow Rules after Field Change:

Specify New Field Value

Picklist Options:

The value above the current one
 The value below the current one
 A specific value: Submit

**Activity 4

Approval Steps:

1. While you are still on Leave Approval Request detail page,
Under approval steps click the new approval step.
2. Give the name as "Approval from HR" and click on next.

Enter Name and Description

Approval Process Name: hahaha

Name: Approval from HR

Unique Name: Approval_from_HR

Description:

3. Under specify step criteria select "Enter this step if the following (Criteria are met)",
Select field : "Leave: No. of Days",
Operator : equals

Value : 5

Specify Step Criteria

All records should enter this step.

Enter this step if the following criteria are met

Field	Operator	Value
Leave: No. of Days	equals	5
--None--	--None--	

AND

AND

AND

Add Filter Logic...

Previous Save Next Cancel

4. Click next.
5. Under select approver : select Automatically assign to approver(s) and for users select the name of the user with the HR role.

Select Approver

Let the submitter choose the approver manually.

Automatically assign to queue.

Automatically assign to approver(s).

User
Niklaus Mikaelson

Add Row Remove Row

When multiple approvers are selected:

Approve or reject based on the FIRST response.

Require UNANIMOUS approval from all selected approvers.

The approver's delegate may also approve this request.

Reject Behavior

What should happen if the approver rejects this request?

Perform all rejection actions for this step AND all final rejection actions (Final Rejection)

Perform ONLY the rejection actions for this step and send the approval request back to the most recent approver (Go Back 1 Step)

Previous Save Cancel

6. Click on Save.
7. No, I'll do this later. Take me to the approval process detail page to review what I've just created and click Go.

** Activity 5

Final Approval Action:

1. Under initial submission action click on add new and then select field update.

Final Approval Actions

Add Existing

Add New

Email Alert

Field Update

Outbound Message

Action	Type	Description
Edit	Record Lock	Lock the record

2. Give name as "Approval Status to Approved".
Select Status for the field to update.
Under specify new field value select "A specific value" and select Approved and click

Save.

The screenshot shows the 'Field Updates' page in Salesforce setup. A new field update is being created with the following details:

- Name:** Approval Status to Approved
- Unique Name:** Approval_Status_to_Approval
- Description:** (empty)
- Object:** Leave
- Field to Update:** Status
- Field Data Type:** Picklist
- Re evaluate Workflow Rules after Field Change:** (unchecked)
- Picklist Options:** A specific value: Approved

**Activity 6

Final Rejection Action:

1. Under initial submission action click on add new and then select field update.

The screenshot shows the 'Final Rejection Actions' page. The 'Add New' button is highlighted, and the 'Field Update' option is selected from the dropdown menu.

2. Give name as "Approval Status to Rejected".
Select Status for the field to update.
Under specify new field value select "A specific value" and select Rejected and click

Save.

The screenshot shows the 'Field Update Edit' page in Salesforce. The 'Identification' section includes fields for Name ('Approval Status to Rejected'), Unique Name ('Approval_Status_to_Reject'), Description (empty), Object ('Leave'), Field to Update ('Status'), Field Data Type ('Picklist'), and a checkbox for 'Re-evaluate Workflow Rules after Field Change'. The 'Specify New Field Value' section shows 'Picklist Options' with three radio button options: 'The value above the current one', 'The value below the current one', and 'A specific value' (which is selected and set to 'Rejected'). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

→Apex Trigger

Use Case:

The Manager at TheSmartBridge wants no duplicate names of employees should enter into the database. So he/she recalls you for the solution.

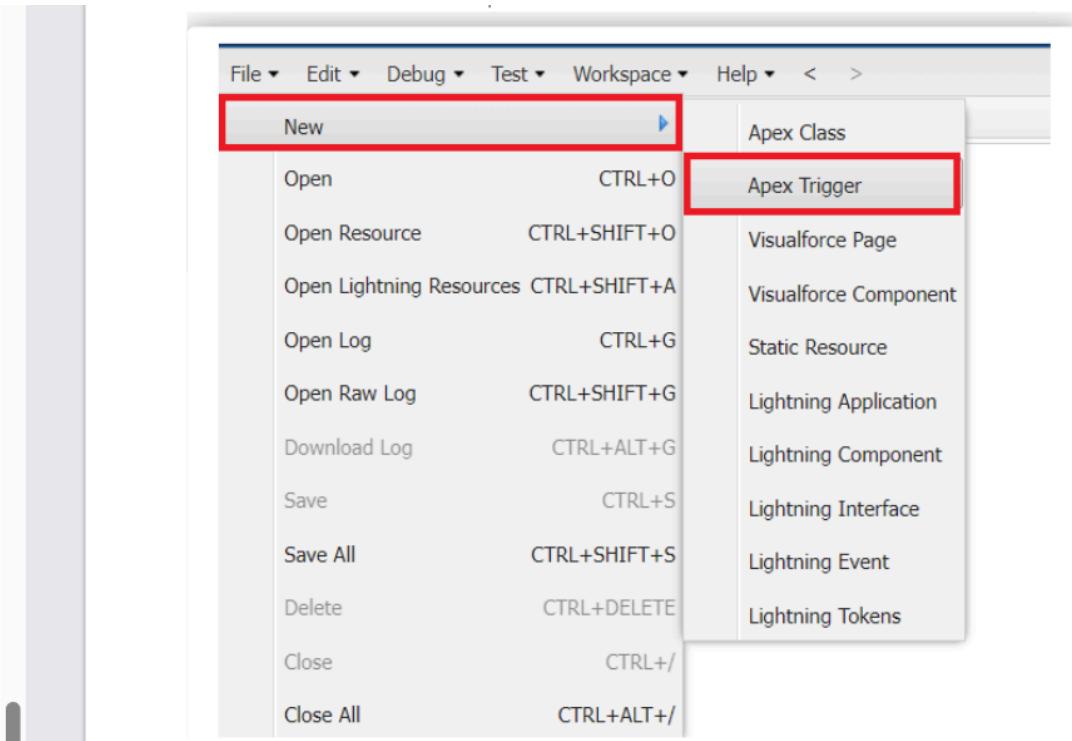
Write a code to achieve this requirement using Salesforce developer skills to fulfill the Managers requirement.

**Activity 1 : Create an Apex Trigger

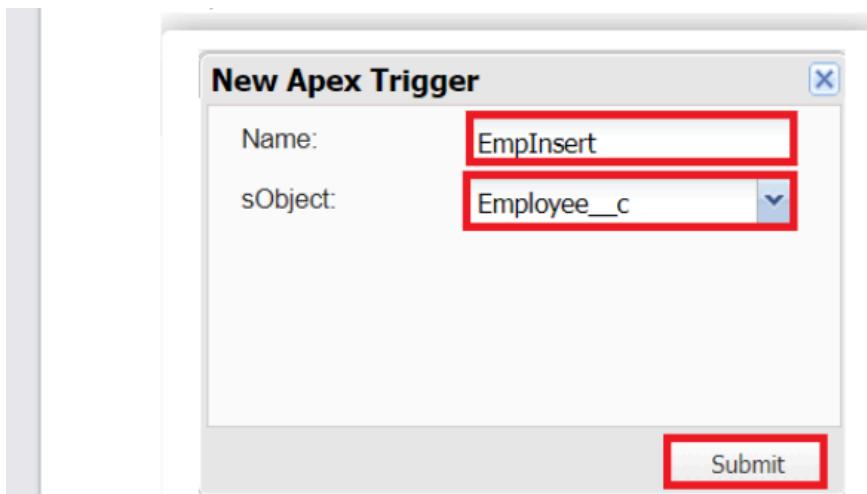
Create an Apex Trigger

1. To create a new Apex Class follow the below steps:

Click on the file --> New --> Apex Class.

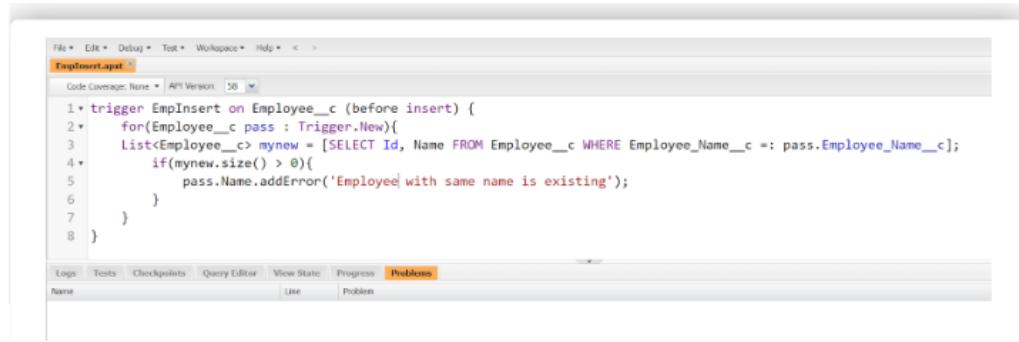


2. Give the Apex Trigger name as "EmpInsert", and select "Employee__c" from the dropdown for sObject.



3. Click Submit.

4. Now write the code logic here



```
trigger EmpInsert on Employee__c (before insert) {
    for(Employee__c pass : Trigger.New){
        List<Employee__c> mynew = [SELECT Id, Name FROM Employee__c WHERE Employee_Name__c =: pass.Employee_Name__c];
        if(mynew.size() > 0){
            pass.Name.addError('Employee with same name is existing');
        }
    }
}
```

Code Snippet:

Code Snippet:

```
trigger EmpInsert on Employee__c (before insert) {
    for(Employee__c pass : Trigger.New){
        List<Employee__c> mynew = [SELECT Id, Name FROM Employee__c WHERE
Employee_Name__c =: pass.Employee_Name__c];
        if(mynew.size() > 0){
            pass.Name.addError('Employee with same name is existing');
        }
    }
}
```

5. Save the code.(click on file --> Save)

**Activity 2 : Testing the Trigger

Follow the steps which are mentioned in Milestone 7, Activity 1 and try to create a record with the existing Employee Name say “Jackie Chan” you’ll face the error while saving the record saying “Employee with same name is existing”.

New Employee: On Site Employee

Information

Employee ID	Owner
Employee Name	demo project
Jackie Chan	Reports to
Gender	Search Employees...
--None--	Qualification
Experience	Phone no
Email	Mode of Work
	None--
Joining date	Time
	Put Time
LinkedIn Profile	Out Time
Leave Days	

Ø We hit a snag.

Review the errors on this page.

- Employee with same name is existing

Review the following fields

- [Employee ID](#)

Leave Days  Cancel Save & New Save

