Mini Project 1 - Project Resource Allocation App

The resource allocation app is for your company to allocate resources effectively into different projects.

Make logical assumptions where requirements are not fully clear.

Learning Objectives

- Gain familiarity with Salesforce setup and End User UI.
- Create a Salesforce App with various customizations.
- Create Custom Objects, Custom Fields, & Custom Object Tabs.
- Gain familiarity with Page Layout, Compact Layout, and Record Type.
- Use Validation rules and formulas.

Time Requirement 6 to 8

hours

Requirements

1. Create a Salesforce app for "<Name> Project Management", give a name of your choice.

2. Update Company Information to reflect India's Time Zone & Currency.

3. Create an HR Profile. (Only App Settings are required: Assigned App and Default App should be the one created in Step 1.)

4. Permission Set: HR User - CRED Permissions for Project, Employee, Project Assignment Objects. View All permission for Account Object.

5. Create Custom Objects & Tabs and add them to the above App.

    a. **Project** - 2 Record Types: Agile, Waterfall

        i. Project Name - Text

        ii. Project Start Date - Date

        iii. Project Duration - Number (Only for Waterfall)

        iv. Number of Sprints - Number (Only for Agile)

        v. Days in Sprint - Number (Only for Agile)

        vi. Project End Date - Formula

        vii. Project Stage - Picklist (Draft, Canceled, Initiated, Development, Testing, Delivered).

        viii. Employees Required - Number

        ix. Employees Assigned - Rollup Summary (Count of Related Project Assignments)

        x. Account - Lookup

        xi.   Project Revenue - Currency

        xii.   Fully Staffed - Formula (Check box) (True if, Employees Assigned = Employees Required)

        xiii.   Any other fields

    b.   Employee

        i.   Name

        ii.   Email (Unique, Required)

        iii.   Employee Number/Id - Autonumber

        iv.   Employee Status - Picklist (Unassigned, Assigned)

        v.   Phone

        vi.   Street Address - Text Area

        vii.   City - Global Picklist

        viii. State - Global Picklist

        ix.   Any other fields

    c.   Project Assignment

        i.   Assignment Number - Autonumber

        ii.   Employee - Master Detail

        iii.   Project - Master Detail

        iv.   Roll off Date - Date (equals to Project End Date)

        v.   Project Start Date (equals to Project Start Date)

        vi.   Any other field

6. Project End Date formula

    a.   For Waterfall Project = Project Start Date + Project Duration

    b.   For Agile Project = Project Start Date + (Number of Sprints * Days in Sprint)

7. Use dependent picklist between state and country fields

8. Create Quick Action on Employee to create a new Project Assignment

9. Create Global Action to create a new Project Assignment

10. Utilize lookup filters to search for Unassigned Employees while creating new Project Assignment

11. Create appropriate page layouts and compact layouts for each object. 2 different Page Layouts for Project Record Types.

12. Create appropriate list views for each object.

13. Email Alert: Send email to an employee when he is assigned to a project with relevant information.

14. Validation Rules:

    a. Employees Assigned should not be greater than Employees Required on Project.

    b. Days in Sprint should not be greater than 40.

    c. Project Start Date should not be a past date.

15. Activity - Task : Create Project Assignments before the Start Date of the Project. (when project is in Draft)

16. Reports

    a. To track the number of Projects in different stages.

    b. To track how many projects are Open grouped by Accounts.

17. Design the UI of the App to make it look good!!

18. Describe what are the issues you faced and what are some improvements that are required but you could not implement using what you currently know.

Expected Outcomes:

1. A Salesforce app that allows HR Users to manage Project Allocations for Employees.
2. Dashboard to visually represent Project Allocation data.

Note: *It is highly encouraged to not restrict yourself to above implementation and include other enhancements or features of your choice. Your creativity is welcomed.*