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Batch:8

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Project Title: Streamlined Employee Detail Management

STREAMLINED EMPLOYEE DETAIL MANAGEMENT

1. Project Overview

Streamlined Employee Detail Management using CRM is a comprehensive and efficient system designed to effectively manage and organize employee information within an organization. This system leverages Customer Relationship Management (CRM) principles and tools to centralize and streamline employee data, providing a robust platform for HR professionals and managers to handle various aspects of employee details.

2. Objectives

Business Goals:

1. Improve data accuracy: Ensure employee data is accurate, up-to-date, and consistent across all systems.
2. Enhance employee experience: Provide a user-friendly and streamlined process for employees to manage their personal details.
3. Increase operational efficiency: Automate manual processes and reduce administrative burdens on HR and management teams.

Specific Outcomes:

1. Develop a centralized employee database: Design and implement a single, unified database to store all employee details.
2. Implement a self-service portal: Create a user-friendly portal for employees to update their personal details, view benefits, and access company information.
3. Automate data validation and workflows: Develop automated processes to validate employee data, detect errors, and trigger workflows for approvals and updates.

3. Salesforce Key Features and Concepts Utilized

- Salesforce
- Object
- Tabs
- The Lightning App
- Fields
- Email Templates
- Users
- Approval Process
- Flows
- User Adoption
- Reports
- Dashboards
- Apex

4. Detailed Steps to Solution

Design

Object Creation

To create an object:

1. From the setup page >>> Click on Object Manager >>> Click on Create >>> Click on Custom Object.
2. Enter the label name "Employee"
3. Plural label name "Employees"
4. Enter Record Name Label and Format
 - Record Name: Employee Name
 - Data Type: Text

5. Click on Allow reports and Track Field History and Allow Activities.

6. Allow search >>> Save.

The screenshot shows the Salesforce Setup interface under 'Object Manager'. A sidebar on the left lists various object configuration options like Fields & Relationships, Page Layouts, and Record Types. The main panel is titled 'Edit Custom Object Employee' and contains a 'Custom Object Definition Edit' form. The 'Label' field is set to 'Employee' with 'Example: Account'. The 'Plural Label' field is set to 'Employees' with 'Example: Accounts'. Below these, the 'Object Name' field is also set to 'Employee'. There is a 'Description' text area and a 'Context-Sensitive Help Setting' section with two radio button options. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons, along with a note about changing object names. The status bar at the bottom right shows it's 11:46 AM on 3/3/2025.

In the similar way Create the objects with the names Organization, Health Insurance, Leave.

This screenshot shows the 'Organization' object being created in the Salesforce Object Manager. The setup is identical to the 'Employee' creation process: a 'Custom Object Definition Edit' form with 'Label' set to 'Organization' and 'Plural Label' set to 'Organizations'. The 'Object Name' field is also 'Organization'. The rest of the interface, including the sidebar with various configuration tabs and the status bar at the bottom, is consistent with the previous screenshot.

Welcome to Skill Wallet - A One

Student - Skill Wallet

Health Insurance | Salesforce

Google Docs - Yahoo Search Re

Untitled document - Google Doc

Setup Home Object Manager

SETUP > OBJECT MANAGER

Health Insurance

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Health Insurance Example: Account

Plural Label: Health Insurances Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Health_Insurance Example: Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Content Name: None

Enter Record Name Label and Format

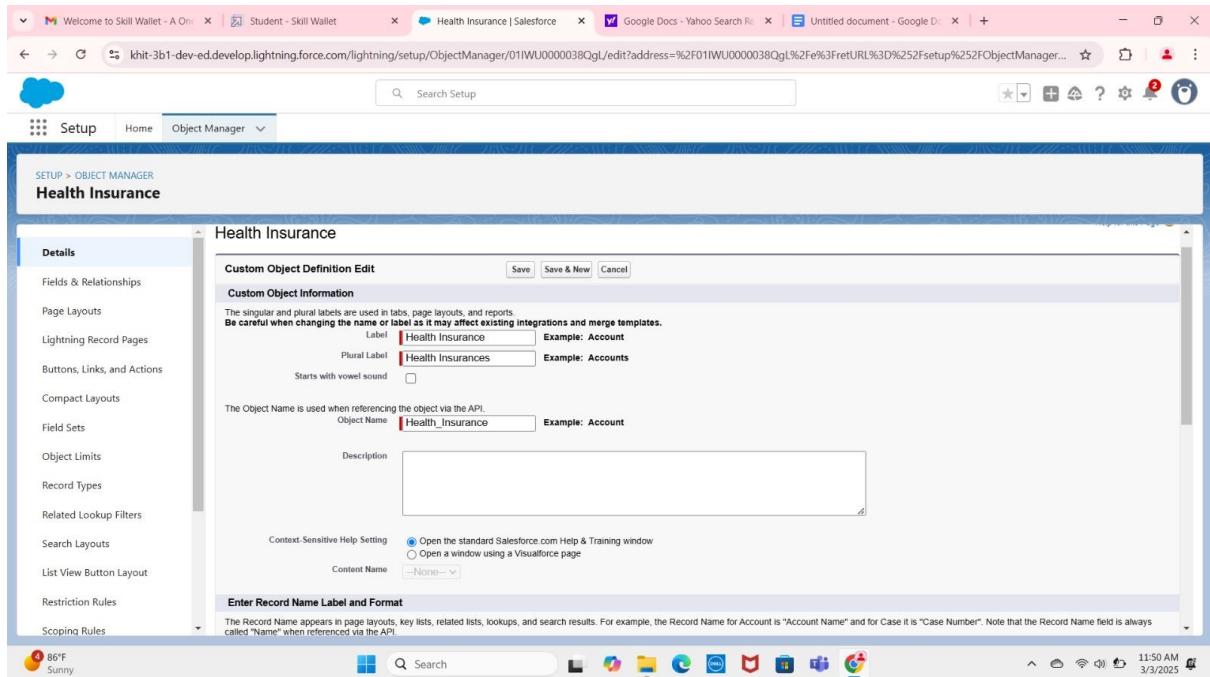
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Help for this Page 

86°F Sunny

Search

11:50 AM 3/3/2025



Welcome to Skill Wallet - A One

Student - Skill Wallet

Leave | Salesforce

Google Docs - Yahoo Search Re

Untitled document - Google Doc

Setup Home Object Manager

SETUP > OBJECT MANAGER

Leave

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Leave Example: Account

Plural Label: Leaves Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Leave Example: Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Content Name: None

Enter Record Name Label and Format

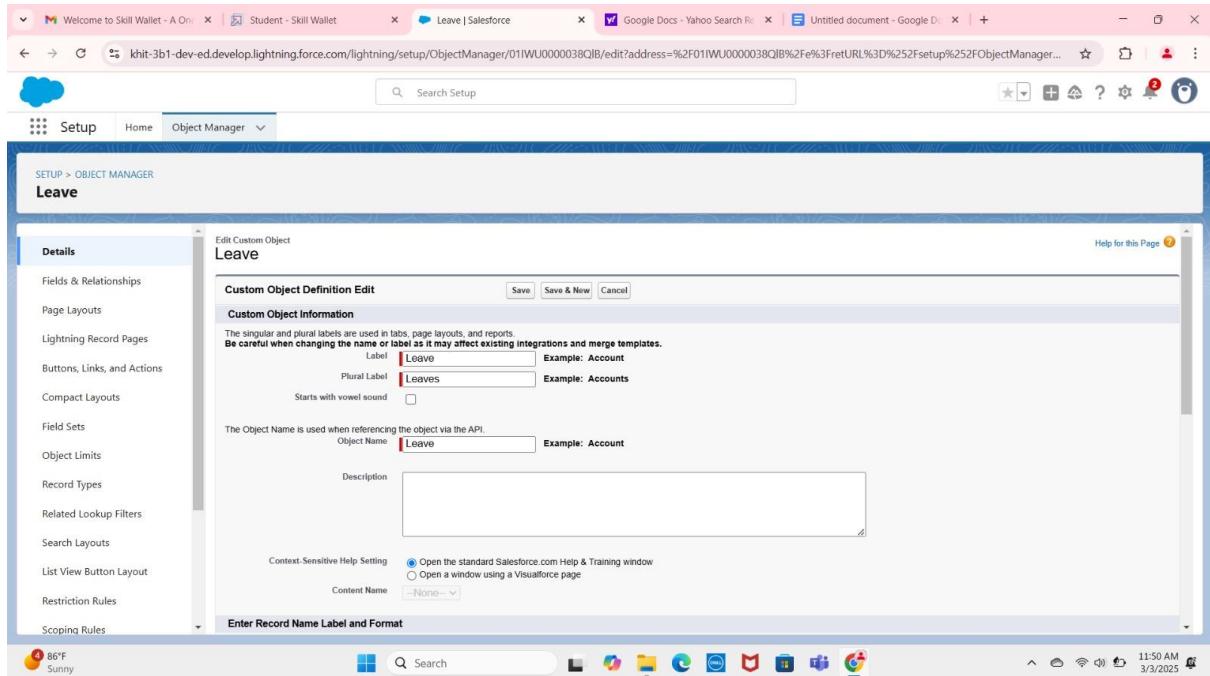
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Help for this Page 

86°F Sunny

Search

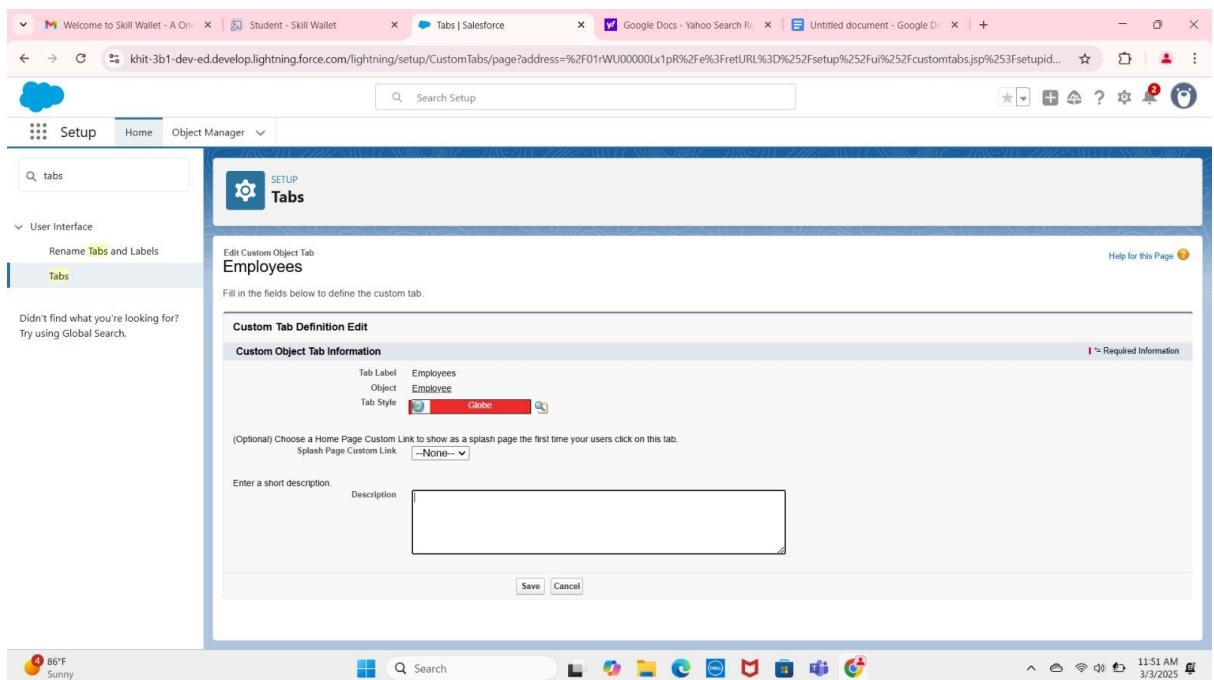
11:50 AM 3/3/2025



Tabs Creation

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

1. Select Object (Employee) >>> Select the tab style >>> Next (Add to profiles page) keep it as default >>> Next (Add to Custom App) uncheck the include tab .
2. Make sure that the Append tab to users' existing personal customizations is checked
3. Click Save.



In the similar way Create the Tabs with the names Organization, Health Insurance, Leave.

Screenshot of the Salesforce Setup interface showing the creation of a custom object tab for "Health Insurances".

The "Custom Tab Definition Edit" screen displays the following information:

- Custom Object Tab Information:**
 - Tab Label: Health Insurances
 - Object: Health Insurance
 - Tab Style: Heart (selected)
- (Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.** (Splash Page Custom Link: None)
- Description:** Enter a short description.
- Buttons:** Save, Cancel

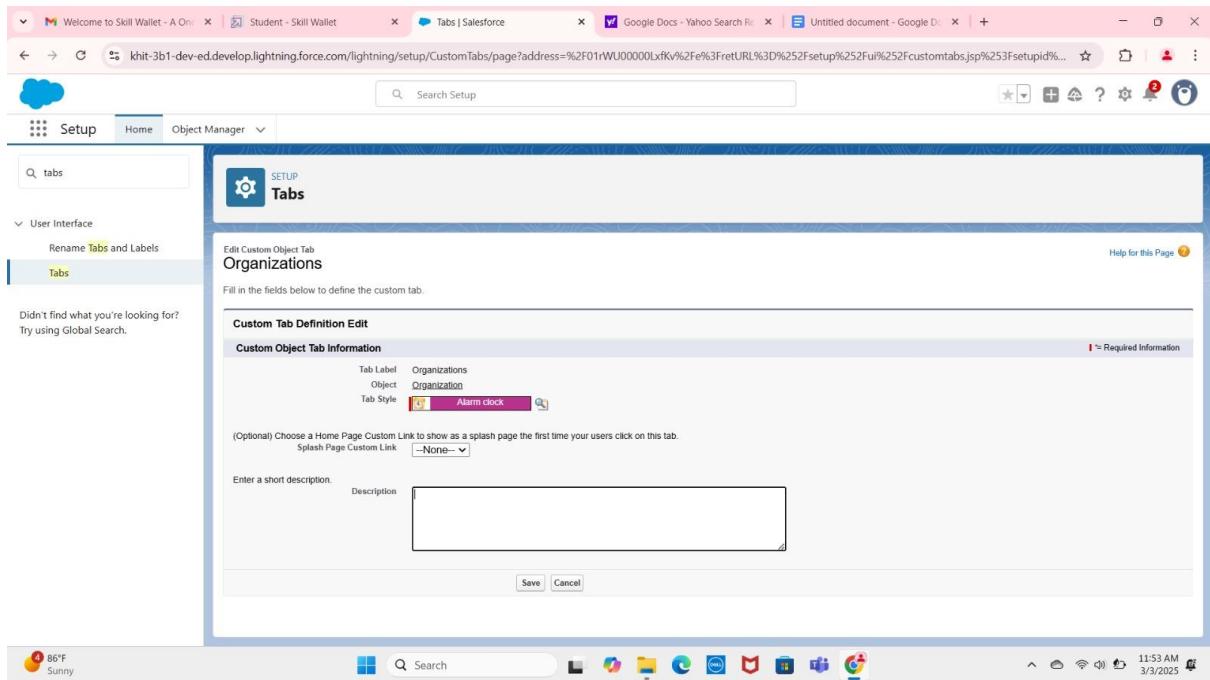
System status bar at the bottom shows: javascript:srcUp(%27%2F01rWU00000LxNr9%2Fe%3FretURL%3D%252Fsetup%252Fu%252Fcus... 86°F Sunny 11:52 AM 3/3/2025

Screenshot of the Salesforce Setup interface showing the creation of a custom object tab for "Leaves".

The "Custom Tab Definition Edit" screen displays the following information:

- Custom Object Tab Information:**
 - Tab Label: Leaves
 - Object: Leave
 - Tab Style: Apple (selected)
- (Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.** (Splash Page Custom Link: None)
- Description:** Enter a short description.
- Buttons:** Save, Cancel

System status bar at the bottom shows: javascript:srcUp(%27%2F01rWU00000Lx6F7%2Fe%3FretURL%3D%252Fsetup%252Fu%252Fcus... 86°F Sunny 11:52 AM 3/3/2025



Create a Lightning App

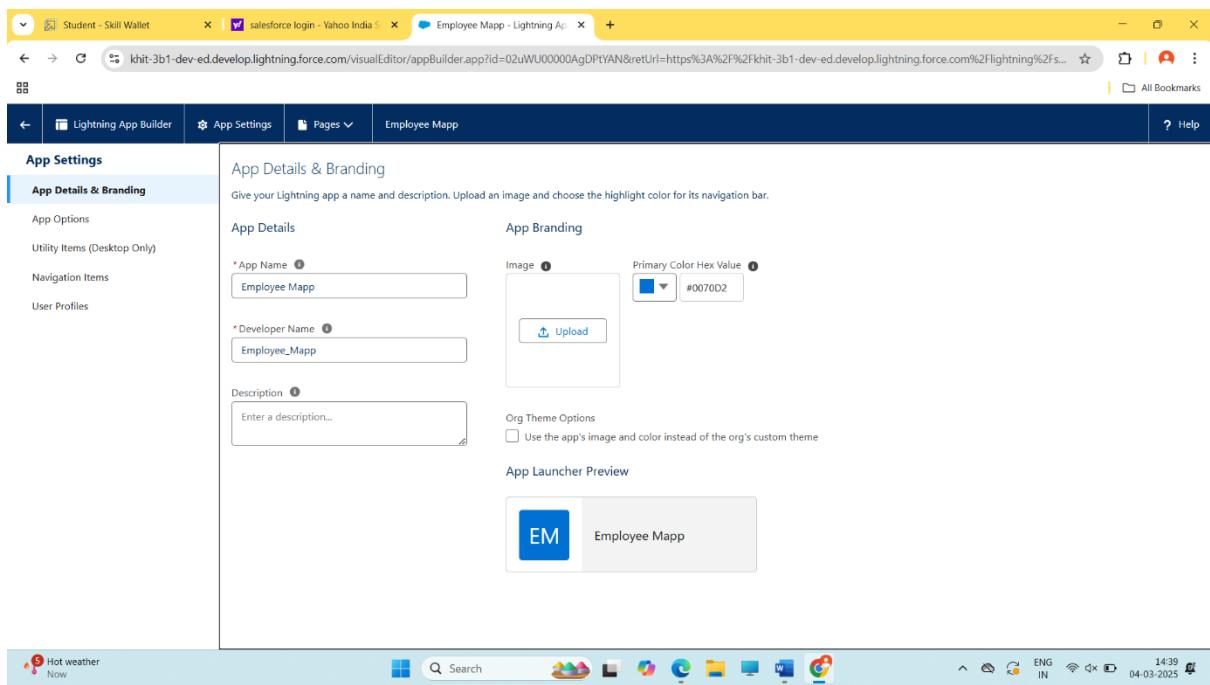
1. Go to setup page >>> search “app manager” in quick find >>> select “app manager” >>> click on new lightning App.

2. Fill the app name in app details as Employee Mapp >>> Next >>> (App option page) keep it as default >>> Next >>> (Utility Items) keep it as default >>> Next.

3. To Add Navigation Items: Select the items (Employee, Organization, Health Insurances, Leave) from the search bar and move it using the arrow button >>> Next.

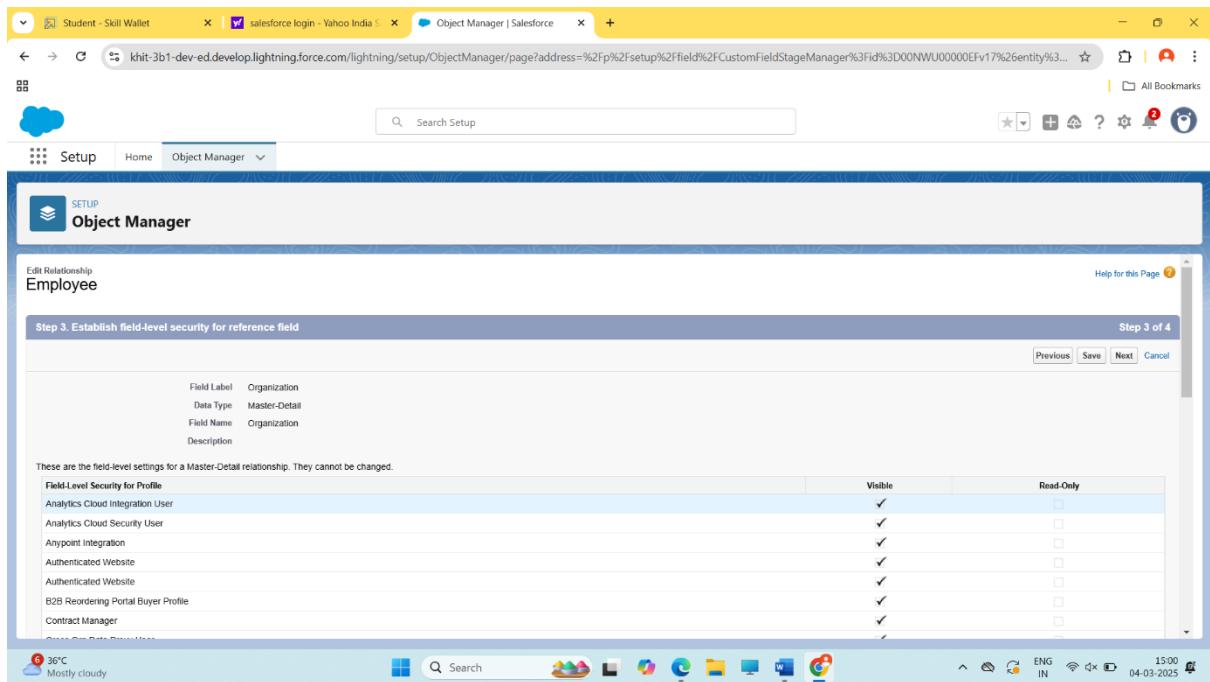
To Add User Profiles:

4. To Add User Profiles: Search profiles (System administrator) in the search bar >>> click on the arrow button >>> save & finish.



Creating a Master-Detail Relationship

1. Go to the setup page >>> click on object manager >>> From drop down click edit for Employee object.
2. Click on fields & relationship >>> click on New.
3. Select “Master-Detail relationship” as data type and click Next.
4. Select the related object Organization and click next.
5. Next>>>Next>>>Save



Creating Lookup Relationship

1. Go to the setup page >>> click on object manager >>> Click the Employee object.
2. Click on fields & relationship >>> click on New.
3. Click Lookup Relationship then next.
4. Related to Health Insurance.
5. Give Field Label as “Health Insurance Name” and click Next.
Next >>> Next >>> Save.
6. Go to the setup page >>> click on object manager >>> Click the “Leave” object.
7. Click on fields & relationship >>> click on New.
8. Click Lookup Relationship then next.
9. Related to Employee.
10. Related to Leaves.
11. Give Field Label as “Health Insurance Name” and click Next.
12. Next >>> Next >>> Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Student - Skill Wallet, salesforce login - Yahoo India, and Object Manager | Salesforce. The main header displays "SETUP" and "Object Manager". Below the header, the page title is "Edit Relationship Employee". The sub-header "Step 3. Establish field-level security for reference field" is visible. The main content area shows a table for "Field Label: Health Insurance" with columns for "Field Label", "Data Type", "Field Name", and "Description". The "Data Type" is listed as "Lookup" and "Field Name" as "Health_Insurance". A note below the table states: "Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security." A table titled "Field-Level Security for Profile" lists various user profiles: Analytics Cloud Integration User, Analytics Cloud Security User, Anypoint Integration, Contract Manager, Cross Org Data Proxy User, and Custom Marketing Profile. For each profile, there are two checkboxes: "Visible" (checked) and "Read-Only" (unchecked). The bottom of the screen shows a Windows taskbar with icons for File Explorer, Edge, and other applications, along with system status indicators like battery level and date/time.

This screenshot is similar to the first one but shows the configuration for the "Leave" object. The top navigation bar, main header, and sub-header are identical. The page title is now "Edit Relationship Leave". The sub-header "Step 3. Establish field-level security for reference field" is also present. The main content area shows a table for "Field Label: Employee" with columns for "Field Label", "Data Type", "Field Name", and "Description". The "Data Type" is listed as "Lookup" and "Field Name" as "Employee". A note below the table states: "Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security." A table titled "Field-Level Security for Profile" lists the same user profiles as the first screenshot. For each profile, there are two checkboxes: "Visible" (checked) and "Read-Only" (unchecked). The bottom of the screen shows a Windows taskbar with icons for File Explorer, Edge, and other applications, along with system status indicators like battery level and date/time.

The Fields Created in Employee Object

This screenshot shows the Salesforce Object Manager interface for the 'Employee' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area displays a table titled 'Fields & Relationships' with 18 items. The table columns are Field Label, Field Name, Data Type, and Controlling Field. Key fields include Designtation_c (Picklist), Distance_c (Formula Number), Email_id_c (Email), Employee_Location_c (Geolocation), Employee_Name (Text(80)), Existing_Health_Insurance_c (Checkbox), Gender_c (Picklist), Health_Insurance_c (Lookup(Health Insurance)), Health_Issue_If_Any_c (Checkbox), LastModifiedBy (Lookup(User)), Name (Text(80)), Organization (Master-Detail(Organization)), Phone_Number_c (Phone), Salary_c (Currency(18, 0)), Shift_Timings_c (Picklist), and Travel_Allowance_c (Checkbox). The status bar at the bottom shows it's 10:24 on 05-03-2025.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Designtation	Designtation_c	Picklist	
Distance	Distance_c	Formula (Number)	
Email Id	Email_id_c	Email	
Employee Location	Employee_Location_c	Geolocation	
Employee Name	Name	Text(80)	
Existing Health Insurance	Existing_Health_Insurance_c	Checkbox	
Gender	Gender_c	Picklist	
Health Insurance	Health_Insurance_c	Lookup(Health Insurance)	
Health Issue If Any	Health_Issue_If_Any_c	Checkbox	
Last Modified By	LastModifiedBy	Lookup(User)	
Name	Name_c	Text(80)	
Organization	Organization_c	Master-Detail(Organization)	
Phone Number	Phone_Number_c	Phone	
Salary	Salary_c	Currency(18, 0)	
Shift Timings	Shift_Timings_c	Picklist	
Travel Allowance	Travel_Allowance_c	Checkbox	

The Fields Created in Organization Object

This screenshot shows the Salesforce Object Manager interface for the 'Organization' object. The left sidebar lists various setup categories. The main area displays a table titled 'Fields & Relationships' with 9 items. The table columns are Field Label, Field Name, Data Type, Controlling Field, and Indexed. Key fields include Company_Name_c (Text(80)), Created_By (Lookup(User)), Email_Id_c (Email), Last_Modified_By (Lookup(User)), Organization_Location_c (Geolocation), Organization_Name (Text(80)), Owner (Lookup(User/Group)), Phone_Number_c (Phone), and Website_c (URL(255)). The status bar at the bottom shows it's 10:26 on 05-03-2025.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Company Name	Company_Name_c	Text(80)		
Created By	CreatedBy	Lookup(User)		
Email Id	Email_Id_c	Email		
Last Modified By	LastModifiedBy	Lookup(User)		
Organization Location	Organization_Location_c	Geolocation		
Organization Name	Name	Text(80)		
Owner	OwnerId	Lookup(User/Group)		
Phone Number	Phone_Number_c	Phone		
Website	Website_c	URL(255)		

The Fields Created in Health Insurance Object

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Welcome to Skill Wallet - A One..., Student - Skill Wallet, salesforce login - Yahoo India, Health Insurance | Salesforce.
- Page Title:** khit-3b1-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IWU0000038QgL/FieldsAndRelationships/view
- Section:** SETUP > OBJECT MANAGER
- Object:** Health Insurance
- Left Sidebar:** Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules.
- Table:** Fields & Relationships (5 items, Sorted by Field Label)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Insurance Company Id	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Text(20)		
Owner	OwnerId	Lookup(User,Group)		✓
- Bottom Bar:** Search, Cloud, Home, Object Manager, Quick Find, New, Deleted Fields, Field Dependencies, Set History Tracking.
- System Status:** Breaking news - 'America is back!...', ENG IN, 10:29, 05-03-2025.

The Fields Created in Leave Object

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Welcome to Skill Wallet - A One..., Student - Skill Wallet, salesforce login - Yahoo India, Leave | Salesforce.
- Page Title:** khit-3b1-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IWU0000038QIB/FieldsAndRelationships/view
- Section:** SETUP > OBJECT MANAGER
- Object:** Leave
- Left Sidebar:** Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers.
- Table:** Fields & Relationships (12 items, Sorted by Field Label)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Duration	Duration_c	Formula (Number)		
Employee	Employee_c	Lookup(Employee)		✓
End Date	End_Date_c	Date		
Health Insurance	Health_Insurance_c	Lookup(Health Insurance)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Leave Name	Name	Auto Number		✓
Leave Status	Leave_Status_c	Picklist		
Leave Type	Leave_Type_c	Picklist		
LeaveID	LeaveID_c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Start Date	Start_Date_c	Date		
- Bottom Bar:** Search, Cloud, Home, Object Manager, Quick Find, New, Deleted Fields, Field Dependencies, Set History Tracking.
- System Status:** IND - AUS Game score, ENG IN, 10:30, 05-03-2025.

Create Email Template For Emergency Leave Approval

To create Email Template:

1. Go to App launcher >>> click on Email Template.
2. Click on “Email Templates” >>> New Email Template.
3. Email Template Name is “Emergency Leave Approved”
4. Related Entity Type >>> Employee
5. Description “Your emergency leave was approved”.
6. Folder “Public Email Templates”.
7. Subject “Your Emergency leave was approved”
8. In the HTML text enter the given information and click save.

Dear {{Employee__c.Name}}

I hope this email finds you well. We wanted to inform you that your emergency leave request has been approved.

Please ensure that all pending tasks are delegated, and you have completed any necessary handovers before proceeding on your leave.

During your absence, if any urgent matters arise or if there is a need for any further assistance, please contact the Manager.

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes tabs for 'Welcome to Skill Wallet - A One...', 'Student - Skill Wallet', 'salesforce login - Yahoo India', and 'Emergency Leave Approved | Sales'. The main content area displays the 'Emergency Leave Approved' Email Template page. The page header shows the template name and a 'Details' tab selected. The 'Information' section contains fields for 'Email Template Name' (set to 'Emergency Leave Approved'), 'Related Entity Type' (set to 'Employee'), 'Description' (set to 'Your emergency leave was approved'), and 'Folder' (set to 'Public Email Templates'). The 'Message Content' section includes a 'Subject' field (set to 'Your Emergency leave was approved') and an 'HTML Value' field containing the text 'Dear {{Employee__c.Name}}'. Below these fields is a note: 'I hope this email finds you well. We wanted to inform you that your emergency leave request has been approved.' and 'Please ensure that all pending tasks are delegated, and you have completed any necessary handovers before proceeding on your leave.' The bottom of the screen shows the standard Salesforce footer with various icons and system status information.

Create User 1

Go to setup >>> type users in quick find box >>> select users >>> click New user.

Fill in the fields

1. First Name: Racheal
2. Last Name: Marc
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: SVP, Human Resources
8. User license: Salesforce Platform
9. Profiles: Standard Platform User

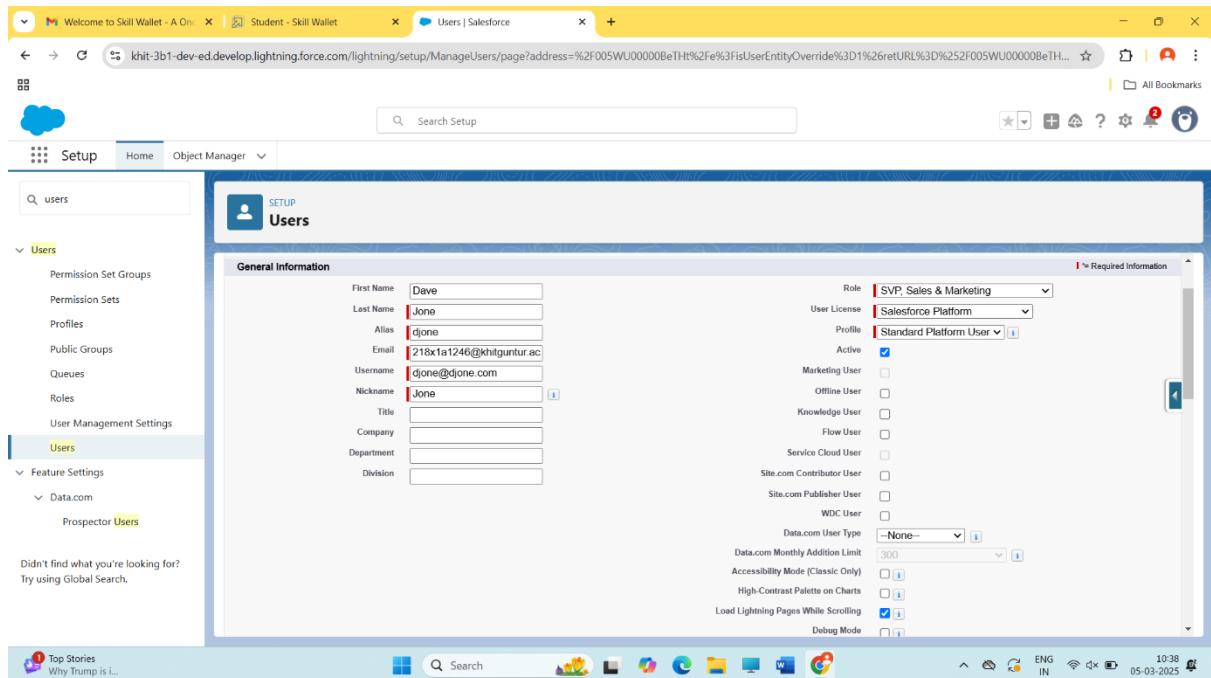
10. Save.

The screenshot shows the Salesforce Setup interface for creating a new user. The main window displays the 'General Information' section of the 'Users' setup page. The user details entered are:

Field	Value
First Name	Racheal
Last Name	Marc
Alias	rmarc
Email	218x1a1246@khitguntur.ac
Username	rmarc@marc.com
Nickname	Marc
Title	
Company	
Department	
Division	

The 'Role' dropdown is set to 'SVP, Human Resources'. The 'User License' dropdown is set to 'Salesforce Platform'. The 'Profile' dropdown is set to 'Standard Platform User'. The 'Active' checkbox is checked. The right side of the screen shows various optional user settings like Marketing User, Offline User, etc., with most being unchecked.

In the same way create user 2 with the name



Create Approval Process For Emergency Leave

To create fields in an object:

1. Go to setup >>> Approval Processes in quick find bar >>> click on it.
2. Manage Approval Process For >>> “Leave” from the drop down.
3. Click on “Create New Approval Process” >>> Use standard setup wizard.
4. Process Name “Emergency Leave Approval” >>> Click Next.
5. Field “Leave: Leave Type” >>> Operator: equals, Value >>> Click on the lookup filter icon and select “Emergency Leave”.
6. Click insert field, then click Next.
7. Field “Leave: Leave Type” >>> Operator: equals, Value >>> Click on the lookup filter icon and select “Emergency Leave”.
8. Next Automated Approver determined by “Manager” from the drop down. Use approver field of leave owner should be marked as check.

9. Select the “Administrators ONLY can edit records during the approval process”. Then Next.
10. Under the Approval Assignment Email Template click in the lookup icon >>> Lightning >>> Public Email Templates “Emergency Leave Approved”. Then Next.
11. From the available fields select >>> Leave ID, and then add >>> Add it to the selected Fields. Similarly add the Owner, Leave, Type, Status. Then Next.
 - Make sure Display approver history is checked.
 - And under security settings check the “Allow approvers to access the approval page only from within the Salesforce application. (Recommended)” option.
12. Submitter type Search >>> Owner, Allowed Submitters >>> Leave Owner. Then Next.
 - Make sure Allow submitters to recall approval requests is checked.
 - Then click save.
13. Once you have saved your approval process, while on the same page click the approval process.
14. At the approval steps, Click on “New Approval Step”.
15. Enter the name as “Approver1” the unique name will automatically be updated. Then Next.
16. All records should enter this step. Then Next.
17. Automatically assign to approvers is to be selected. User: from the lookup give the user.
18. “Approve or reject based on the FIRST response” is to be selected. Then click save.
19. While on the same Approval Process page .Under the “Final Approval Action” click Add New from the drop down select “Email Alert”.
20. Description: Your emergency leave request was approved. Unique name is auto populated.
21. Email Template, click the lookup option and select Emergency Leave Approved.
22. Recipient Type : User, Selected Recipient : Leave Owner. Then click save.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Title:** Approval Processes
- Section:** Leave
- Instructions:**
 - Read the help topic
 - Define criteria
 - Create a custom user hierarchical relationship field
 - Create email templates
 - Create an approval process using either the Jump Start or Standard Wizard
 - Add the approval process to Related List to all page layouts
 - Activate the process to deploy to your users
- Manage Approval Processes For:** Leave
- Active Approval Processes:** No approval processes available.
- Inactive Approval Processes:**

Action	Approval Process Name	Description
Edit Activate Del	Emergency_Leave_Approval	

The screenshot shows the detailed view of the Emergency_Leave_Approval approval process in the Salesforce Setup interface:

- General Information:**
 - Unique Name: Emergency_Leave_Approval
 - Description: Leave: Leave Type EQUALS Emergency Leave
 - Record Editability: Administrator ONLY
 - Allow Submitters to Recall Approval Requests: checked
 - Approval Assignment Email Template: Emergency_Leave_Approved
 - Initial Submitters: Leave Owner
 - Created By: Batch eight, 03/03/2025, 12:51 pm
 - Modified By: Batch eight, 03/03/2025, 1:04 pm
- Initial Submission Actions:**
 - Action: Record Lock
 - Type: Description
 - Description: Lock the record from being edited
- Approval Steps:**

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Approver1			User: Racquel Marc	Final Rejection
- Final Approval Actions:**
 - Action: Record Lock
 - Type: Description
 - Description: Lock the record from being edited

Create Flow for Shift to start

1. Go to setup >>> type Flow in quick find box >>> Click on the Flow and Select the New Flow.
2. Select the record Triggered flow. Click on create.

3. Under Object select "Employee". Click on A record is created or updated. Actions and Related Records, Done.
4. Select Free Form Layout for the flow and then Click on the Manager option, You will find "New Resource"
5. Select "Text Template"
6. Then API name should be filled as "Email Body", And enter the given details in it

{!Emailbody}

Just a quick note to inform you that your shift has now started. We're excited to have you on board and ready to make a positive impact today!

Should you need any support or have any questions during your shift, don't hesitate to reach out to your team members or supervisor.

Health Issues If Any: {!\$Record.Health_Issues_If_Any_c}

Existing Insurance: {!\$Record.Existing_Health_Insurance_c}

Travel Allowance: {!\$Record.Travel_Allowance_c}

7. Click "New Resource" under manager.

8. Select "Text Template"

9. Then API name should be filled as "Subject".And enter the given details in it (Hi this is to inform you that your shift has just started.) Make sure it is "view as plain text".

10. Click Done.

11. Drag the "Action" element from the toolbox onto the screen.

12. Under Category dropdown select Email, Then in the action bar select "Send Email" action.

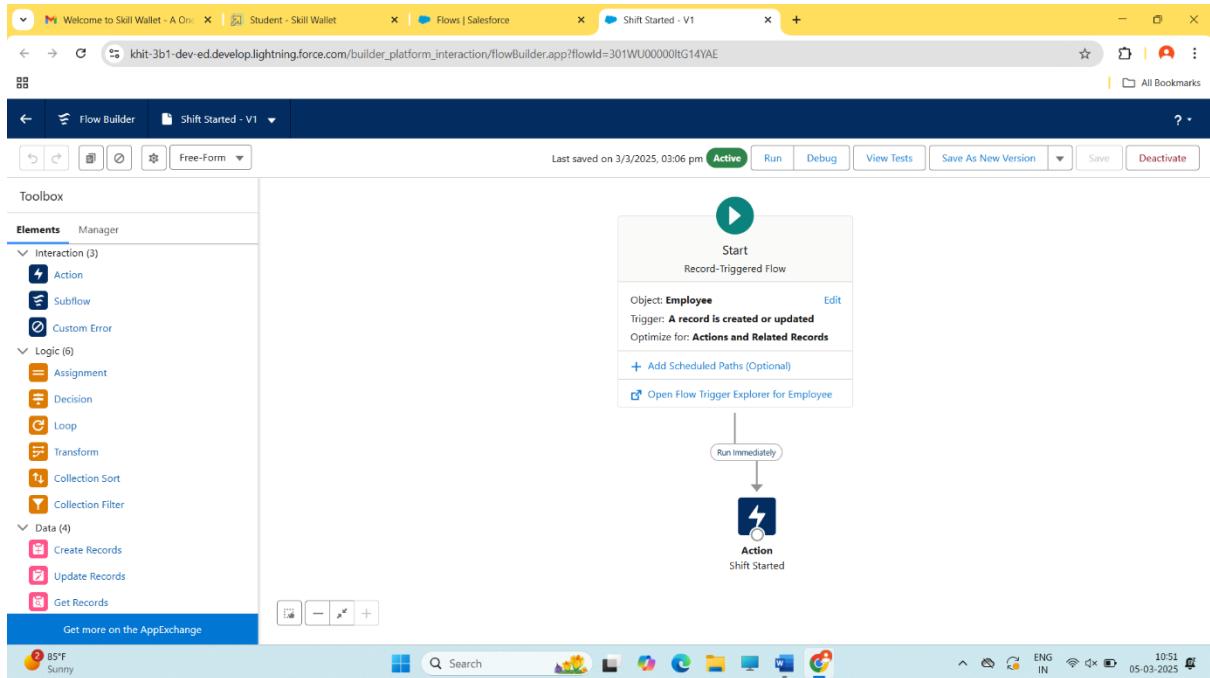
13. Give API name as "Shift Started".

14. Change the toggle to "Include the Body" Select {!Emailbody} from the dropdown.

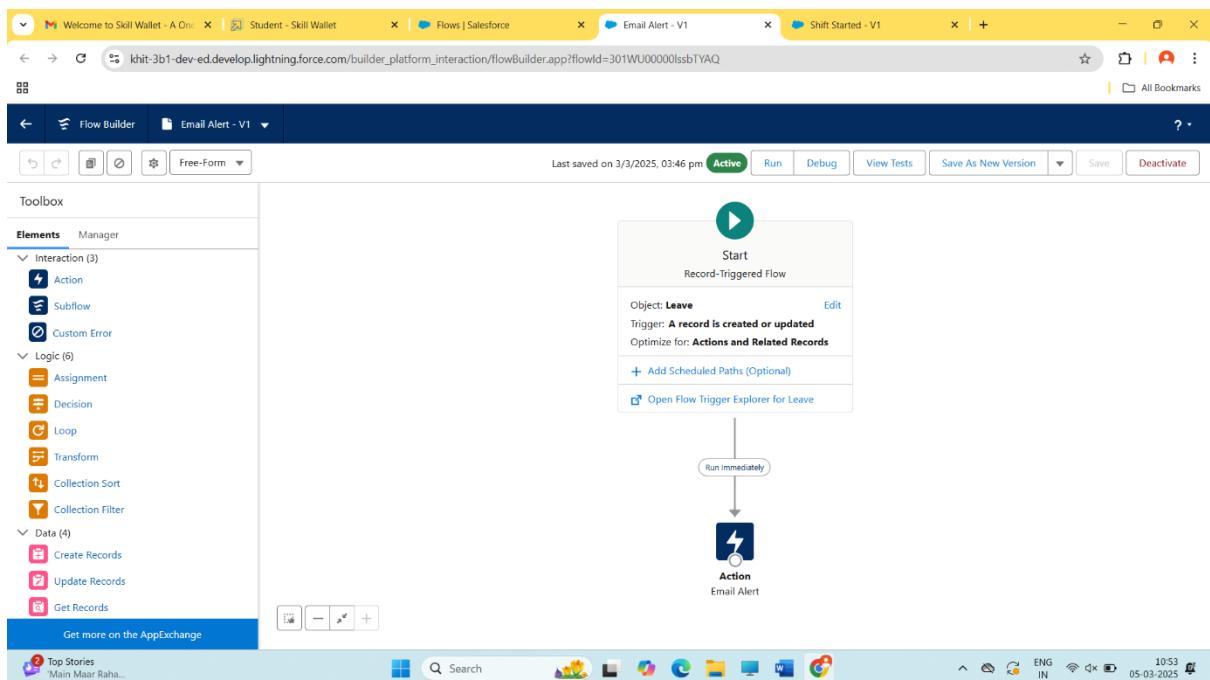
15. Change the toggle to "Include the Subject" Select {!Subject} from the dropdown.

16. Change the toggle for recipient address list to include. From the dropdown select "{!\$Record.Email_Id_c}"

17. And then click save, and click on activate.



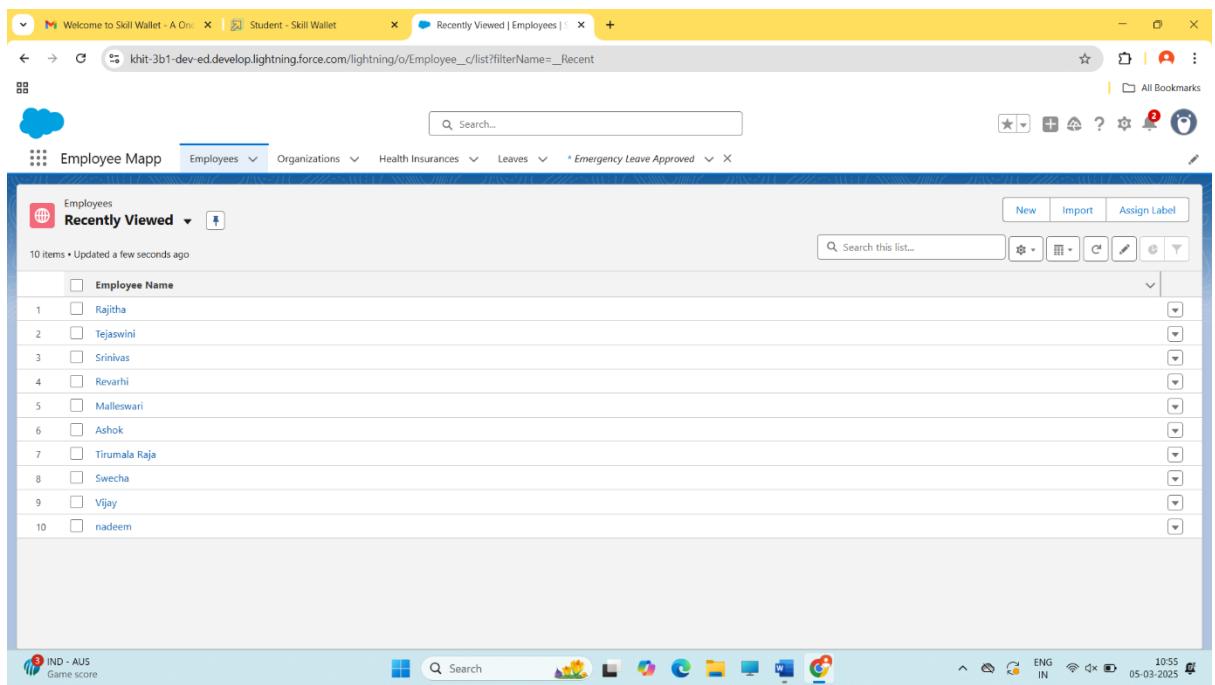
In the same create another flow with the name Email Alert.



User Adoption

Create Records for the Employee object

1. Go to App Launcher >>> click on Employee Mapp.
2. Click on the employee Tab. Click on New.
3. Fill in the employee details.
4. Give the employee name, email, date of birth, gender, salary all the fields are to be filled including shift timings.
5. Make sure you fill the location in terms of latitude and longitude as shown below.
6. Then click save and new. (Similarly create more records in the employee object)



In the same way create records for Organization, Helath Insurance, and Leave Objects

Welcome to Skill Wallet - A One... | Student - Skill Wallet | Recently Viewed | Organization

khit-3b1-dev-ed.lightning.force.com/lightning/o/Organization_c/list?filterName=_Recent

Employee Map Employees Organizations Health Insurances Leaves * Emergency Leave Approved

Organizations Recently Viewed

6 items • Updated a few seconds ago

	Organization Name
1	Disney
2	Benze
3	OTT
4	IPL
5	IT
6	KHIT

IND - AUS Game score Search ENG IN 10:55 05-03-2025

Welcome to Skill Wallet - A One... | Student - Skill Wallet | Recently Viewed | Health Insurance

khit-3b1-dev-ed.lightning.force.com/lightning/o/Health_Insurance_c/list?filterName=_Recent

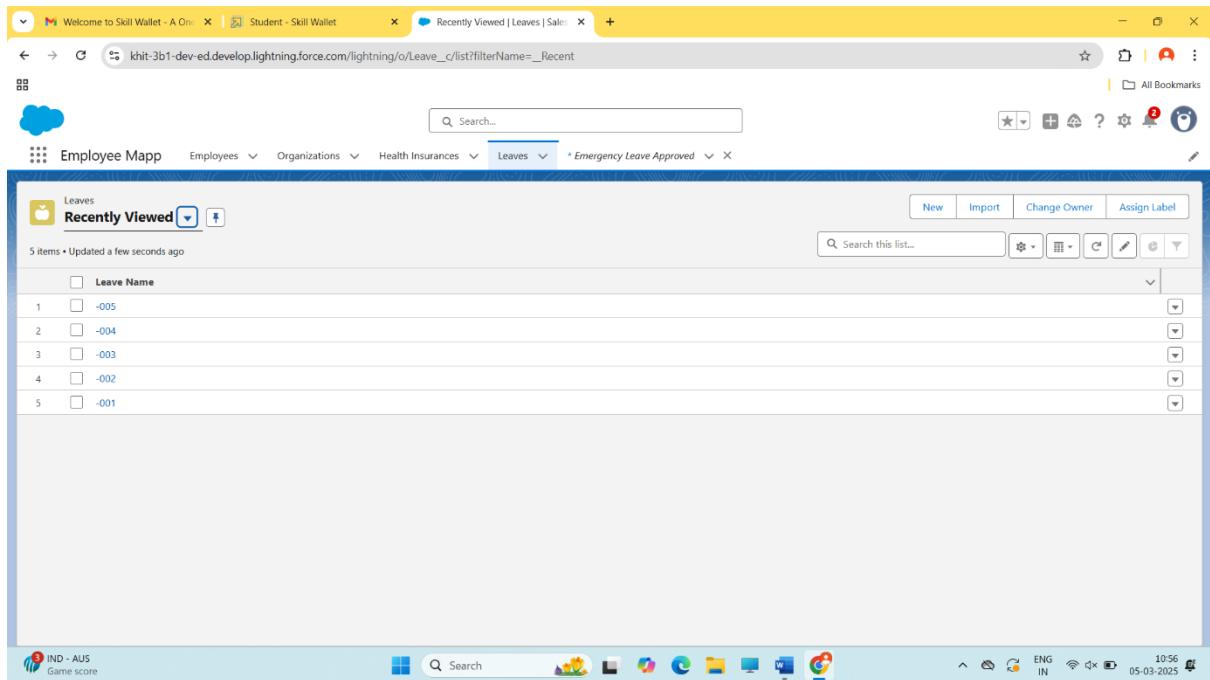
Employee Map Employees Organizations Health Insurances Leaves * Emergency Leave Approved

Health Insurances Recently Viewed

5 items • Updated a few seconds ago

	Insurance Company Id
1	-005
2	-004
3	-003
4	-002
5	-001

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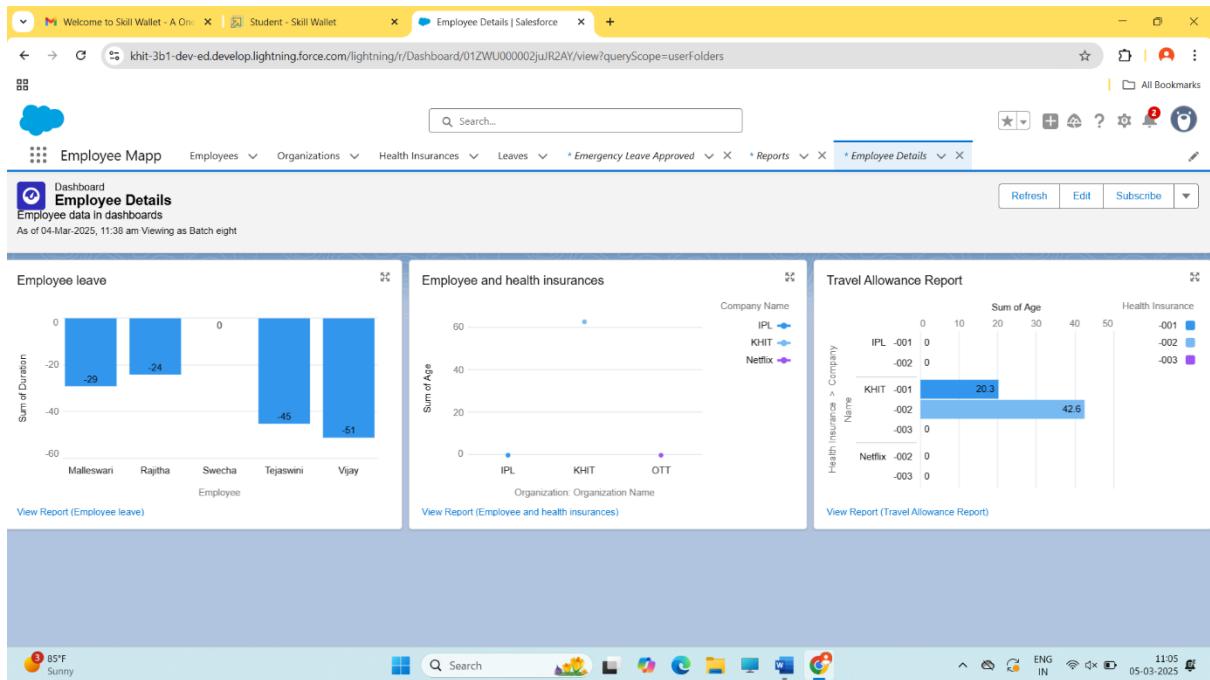


Create Report

1. Go to the app >>> click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel >>> click on start report.
4. Select report >>> Employees with Organizations with Travel Allowances , Then click on start report.
5. Once you click on start report you will see that the records you have created would be displayed.
6. Group the columns according to your preference from the dropdown as shown.
7. Save your report as Travel Allowance Report. And run it.
8. Similarly create a report for Organizations with Employees and Health Insurances and save it as “Employee and health insurances”.
9. Similarly create a report for Leave with employee and save it as “Employee leave details”.

Create Dashboard

1. Go to the app >>> click on the Dashboards tabs.
2. Give a Name and click on Create.
3. Select add component.
4. Select a Report and click on select.
5. Add the component on the dashboard.
6. Click save then done.



5. Testing and Validation

Create a Class in Apex

1. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Class.
2. Enter the name “LeaveTriggerHandler” click ok.
3. Enter the given code in the console.

```
public class LeaveTriggerHandler {
    public static void ifMaleEmployee(List<Leave__c> leaveRequests) {
        // Fetch employees related to leave requests
        Set<Id> employeeIds = new Set<Id>();
        for (Leave__c leaveRequest : leaveRequests) {
            if (leaveRequest.Employee__c != null) {
                employeeIds.add(leaveRequest.Employee__c);
            }
        }
    }
}
```

```

    }

// Fetch employee records

Map<Id, Employee__c> employeesMap = new Map<Id, Employee__c>([SELECT Id,
Gender__c FROM Employee__c WHERE Id IN :employeeIds]);

// Check eligibility for maternity leave and gender

for (Leave__c leaveRequest : leaveRequests) {

    if (leaveRequest.Leave_Type__c == 'Maternity Leave') {

        Employee__c emp = employeesMap.get(leaveRequest.Employee__c);

        if (emp != null && emp.Gender__c != null && emp.Gender__c == 'Male') {

            leaveRequest.addError('Male employees are not eligible for Maternity Leave');

        }

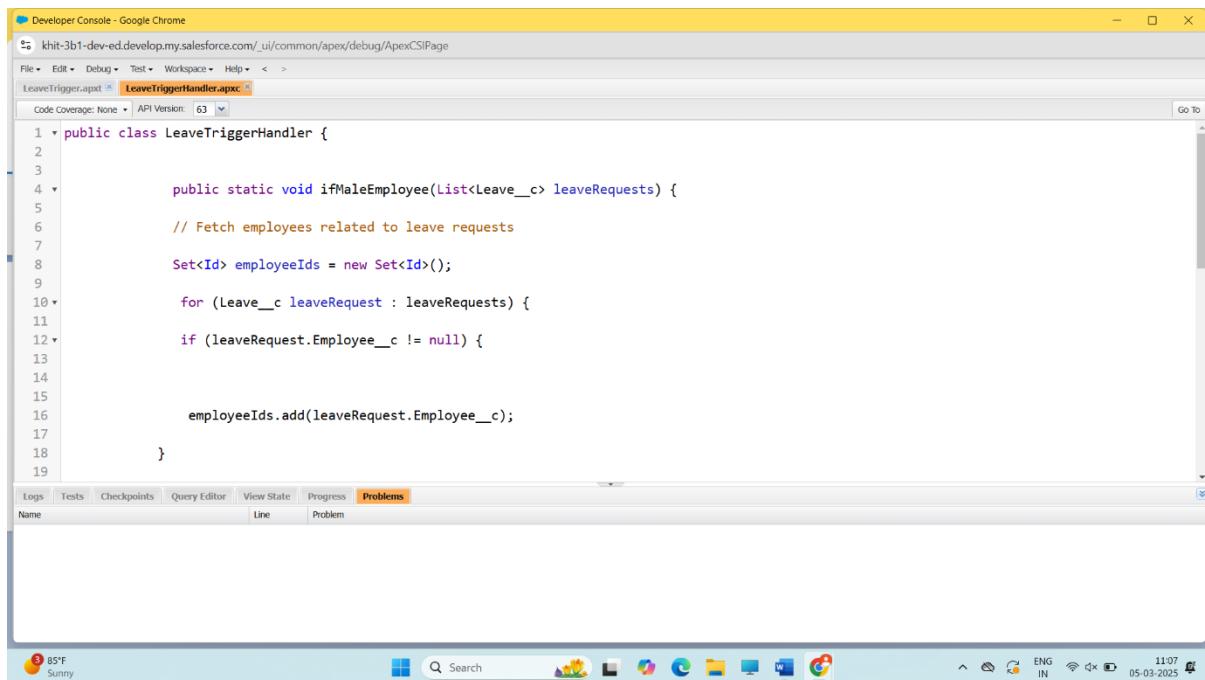
    }

}

}

```

4. Check for errors and save it.



Create a trigger in Apex

1. Login to the Developer account and navigate to the gear account in the top right corner.
2. Then we can see the Developer console. Click on the developer console and you will navigate to a new console window.
3. Then you can see many tools in the Toolbar of the new console window. Click on File, New and Apex Trigger.
4. Enter the name “LeaveTrigger” select the sObject from the list “leave__c”.
5. Enter the given code in the console, check for errors and save.

```
trigger LeaveTrigger on Leave__c (before insert) {  
    if(trigger.isBefore){  
        if(trigger.isInsert){  
            LeaveTriggerHandler.ifMaleEmployee(trigger.new);  
        }  
    }  
}
```

The screenshot shows the Salesforce Developer Console interface. At the top, there's a menu bar with File, Edit, Debug, Test, Workspace, Help, and a Go To button. Below the menu is a tabs section with 'LeaveTrigger.apx' and 'LeaveTriggerHandler.apx'. A status bar at the bottom indicates 'Code Coverage: None' and 'API Version: 63'. The main area contains a code editor with the following Apex trigger code:

```
1 trigger LeaveTrigger on Leave__c (before insert) {
2     if(trigger.isBefore){
3         if(trigger.isInsert){
4             LeaveTriggerHandler.ifMaleEmployee(trigger.new);
5         }
6     }
7 }
```

Below the code editor is a navigation bar with tabs: Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Problems tab is selected, showing a table with columns Name, Line, and Problem. The system tray at the bottom of the screen shows the date and time as 05-03-2025 11:07.

6.Key Scenarios Addressed by Salesforce in the Implementation Project

Scenario 1: Employee Onboarding

1. Automated workflows: Salesforce automates the onboarding process, assigning tasks and sending notifications to relevant teams.
2. Customizable onboarding templates: Salesforce provides customizable templates for onboarding, ensuring consistency and accuracy.
3. Integration with HR systems: Salesforce integrates with HR systems, such as Workday or BambooHR, to streamline data transfer.

Scenario 2: Employee Data Management

1. Centralized employee database: Salesforce provides a single, unified database for storing employee details, ensuring data accuracy and consistency.
2. Real-time data updates: Salesforce enables real-time data updates, ensuring that employee information is always up-to-date.

3. Customizable fields and objects: Salesforce allows for customizable fields and objects, enabling organizations to capture unique employee data.

Scenario 3: Managerial Tasks and Approvals

1. Automated approval workflows: Salesforce automates approval workflows, streamlining managerial tasks and ensuring timely approvals.
2. Customizable approval processes: Salesforce allows for customizable approval processes, enabling organizations to define unique approval workflows.
3. Real-time notifications: Salesforce provides real-time notifications, ensuring managers stay informed about pending approvals and tasks.

Scenario 4: Reporting and Analytics

1. Customizable reports and dashboards: Salesforce provides customizable reports and dashboards, enabling organizations to track key metrics and KPIs.
2. Real-time analytics: Salesforce enables real-time analytics, providing insights into employee data, managerial tasks, and organizational performance.
3. Integration with external systems: Salesforce integrates with external systems, such as HRIS or payroll systems, to provide a comprehensive view of organizational data.

By addressing these key scenarios, Salesforce provides a comprehensive solution for streamlined employee detail management, enabling organizations to improve data accuracy, increase efficiency, and enhance employee experience.

7. Conclusion

Streamlined Employee Detail Management using CRM is a comprehensive and efficient system designed to effectively manage and organize employee information within an organization. This system leverages Customer Relationship Management (CRM) principles and tools to centralize and streamline employee data, providing a robust platform for HR professionals and managers to handle various aspects of employee details.