✅ Objective

Create a custom Salesforce application to store employee data and display whether they are eligible for an annual increment.

Eligibility Criteria: At least 1 paper publication AND consultancy involvement.

🔧 Steps to Create the App in Salesforce

🔹 Step 1: Log in to Salesforce

Go to https://login.salesforce.com

Use your Salesforce Developer Account (or create one free if needed).

🔹 Step 2: Create a New Custom App

Setup (Gear Icon) → Setup

In the Quick Find box → Type "App Manager" → Click on it.

Click "New Lightning App"

App Name: Employee Management

Click Next → Choose Standard Navigation → Click Next

Choose utility items if needed → Click Next

Add required user profiles (e.g., System Administrator) → Save & Finish

🔹 Step 3: Create a Custom Object – "Employee"

Go to Setup

In Quick Find, type "Objects" → Click on Object Manager

Click "Create" → Custom Object

Fill:

Label: Employee

Plural Label: Employees

Object Name: Employee

Enable:

"Allow Reports"

"Track Field History"

"Allow Activities"

Click Save

🔹 Step 4: Add Custom Fields to Employee Object

Go to your Employee object and add the following fields:

Field Label Data Type Description

Full Name Text Employee's full name

E-mail ID Email Employee's email address

Employee ID Text Unique employee ID

Paper Publications Number Number of papers published

Consultancy Checkbox Whether the employee did consultancy work

Eligible For Increment Formula (Checkbox) Calculates eligibility automatically

✅ How to add these:

Go to Object Manager → Employee → Fields & Relationships → New

Select appropriate field types and enter details for each field above

For Formula Field (Eligible for Increment):

Data Type: Formula

Return Type: Checkbox

Formula:

scss

Copy

Edit

AND(Paper\_Publications\_c >= 1, Consultancy\_c = TRUE)

Click Next → Save

🔹 Step 5: Add Records (Employees)

Go to App Launcher (Grid icon) → Search and open your Employee Management app.

Click on Employees tab → New

Enter values:

Full Name, Email, Employee ID

Enter number of publications

Check Consultancy box if applicable

Click Save

Salesforce will automatically calculate “Eligible For Increment” based on the criteria.

🔹 Step 6: Display Eligibility in List View or Record Page

You can customize views to show "Eligible for Increment":

Go to Object Manager → Employee → Search Layouts

Edit List View Layout → Add "Eligible for Increment" field to visible fields.

Or,

On the Record Page, use Lightning App Builder to display it clearly in the layout.

🔹 Step 7: Test the Functionality

Add multiple records with different values.

Confirm that eligibility checkbox is only checked when:

Publications ≥ 1 AND

Consultancy is TRUE

✅ Final Output

For each employee record, you will see:

All input fields (Name, Email, ID, etc.)

"Eligible For Increment" field (auto-calculated)

Proper visibility in list view or reports.