

Workforce Administration Solution

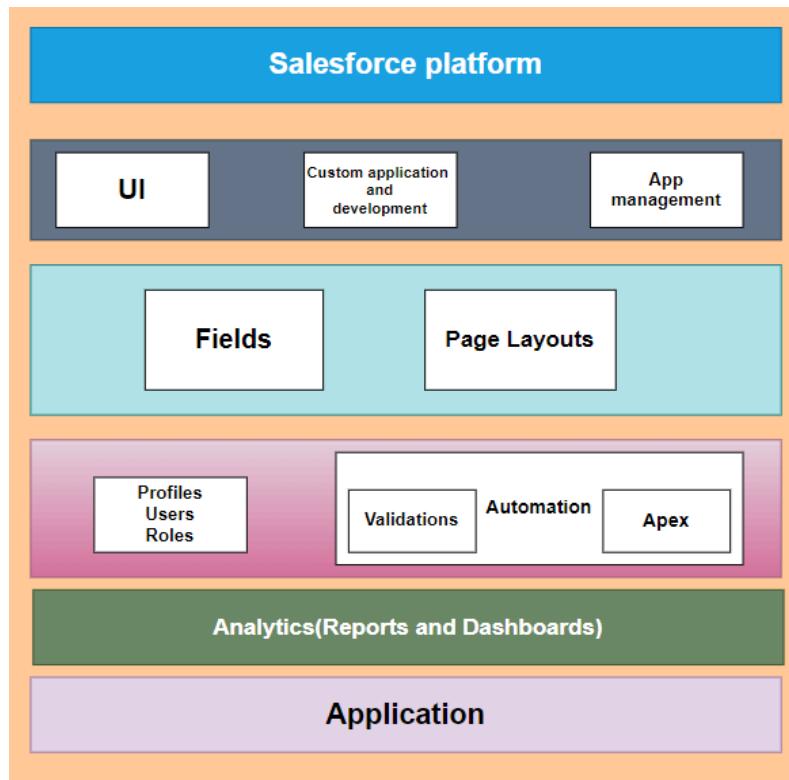
Project Description:

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.

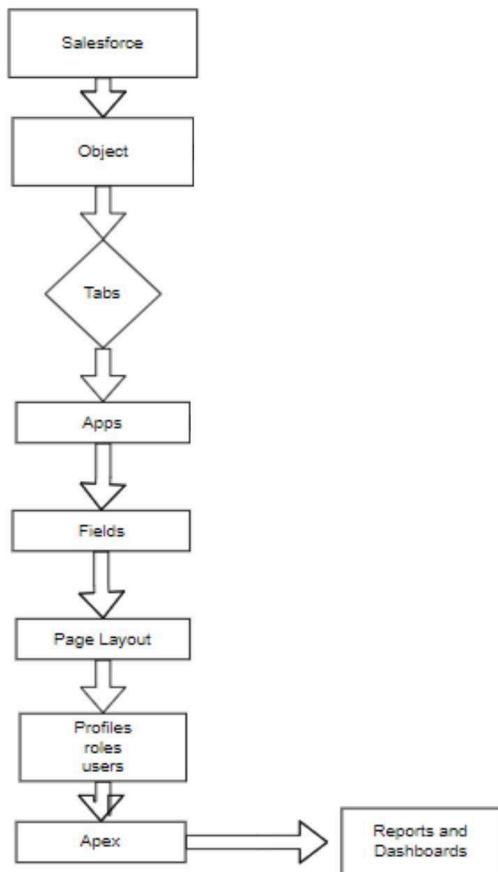
Short Description:

Workforce Administration Solution automates employee project work and asset assignments, centralizing data management, project tracking, and performance monitoring within organizations.

Technical Architecture:



Project Flow:



System Requirements:

Windows 8 machine

Install with two web browser

Bandwidth of 30mbps

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

Use Case:

In an effort to enhance data security and performance while simplifying system administration, TheSmartBridge company is transitioning to Salesforce, a new cloud technology. By leveraging this advanced platform, the company can ensure the safe storage of sensitive data through robust encryption and proactive backup mechanisms. The cloud's automated data replication capabilities provide added protection and efficient disaster recovery solutions. With access to scalable resources, TheSmartBridge can optimize performance, ensuring fast and reliable access to data. This shift to the new cloud technology streamlines administrative tasks, reducing complexity and allowing system administrators to focus on higher-value activities, ultimately increasing productivity and enhancing overall operational efficiency.

Milestone 1-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.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3lGde5k>

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.

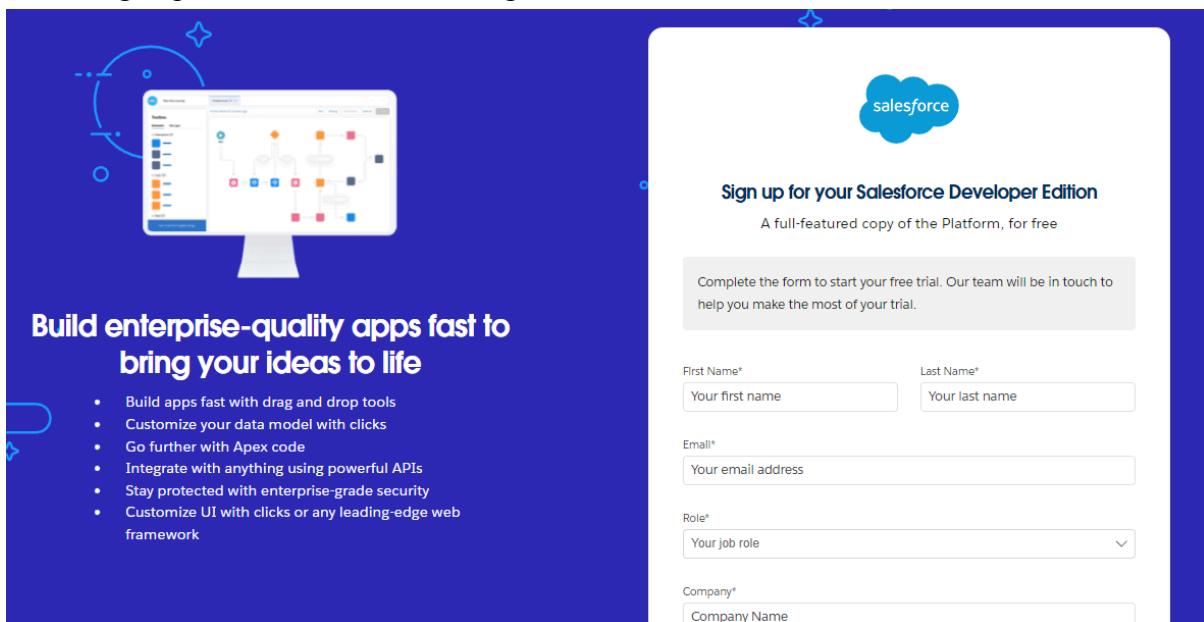
3	Enterprise	Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so 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 :



Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*	Last Name*
<input type="text" value="Your first name"/>	<input type="text" value="Your last name"/>
Email*	
<input type="text" value="Your email address"/>	
Role*	
<input type="text" value="Your job role"/>	
Company*	
<input type="text" value="Company Name"/>	

- 1) First name & Last name
- 2) Email
- 3) Role : Developer
- 4) Company : College Name

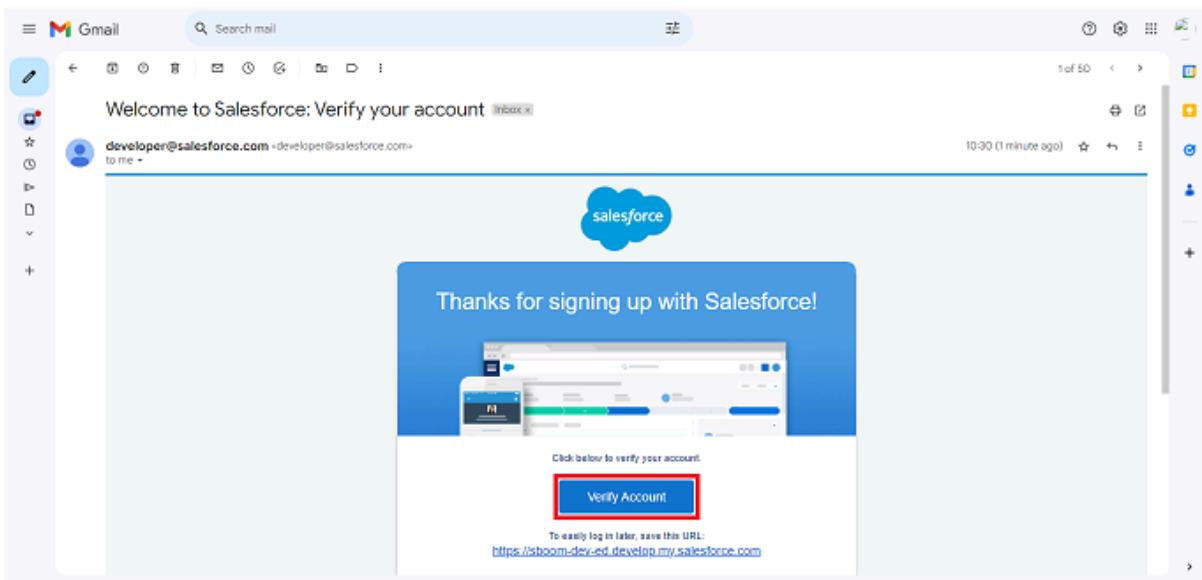
- 5) County : India
- 6) Postal Code : pin code
- 7) Username : should be a combination of your name and company

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

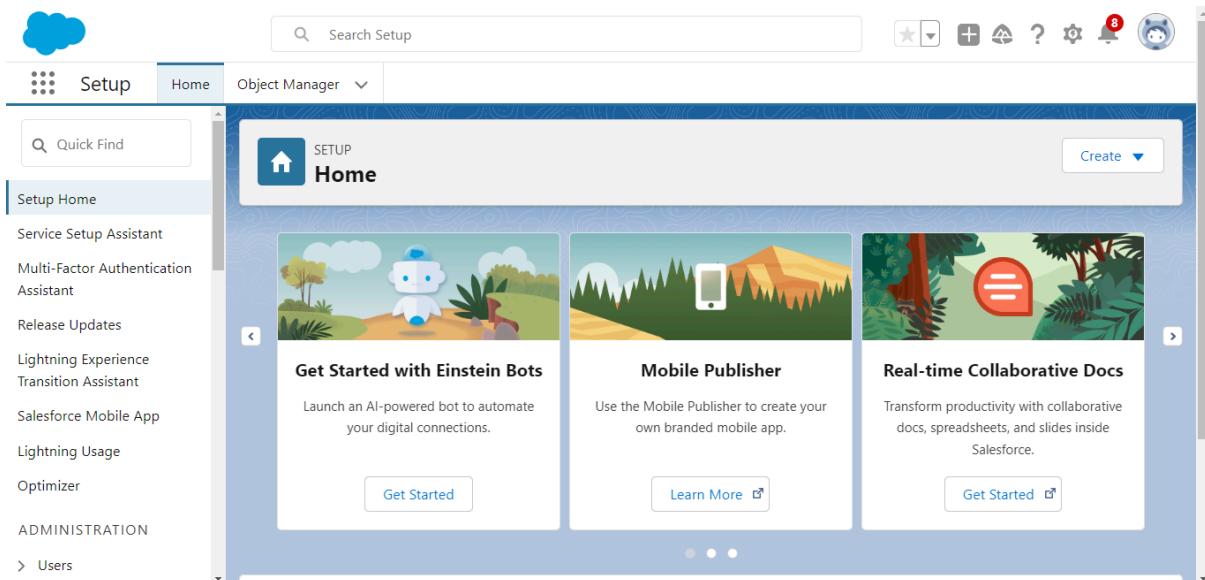
* Confirm New Password
 Match

Security Question
 ▾ In what city were you born?

* Answer

Change Password

4. Then you will redirect to your salesforce setup page.



The screenshot shows the Salesforce Setup Home page. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Users. The main content area features a "Home" section with three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Each card has a "Get Started" button.

Milestone 2- 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:

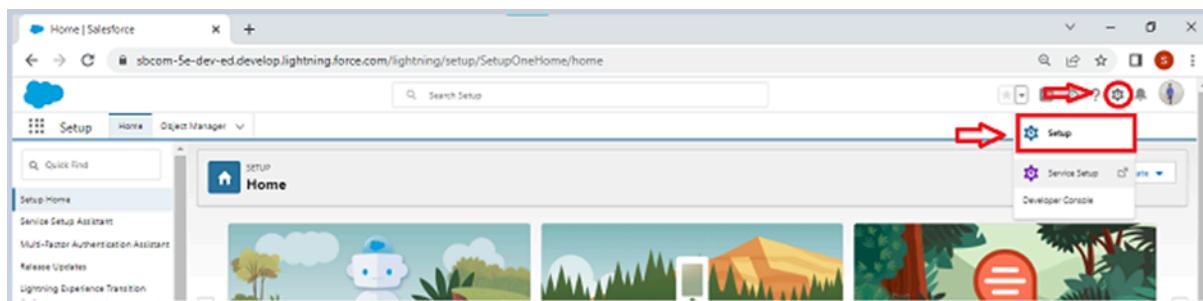
1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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



Setup Home Object Manager ▾

Object Manager

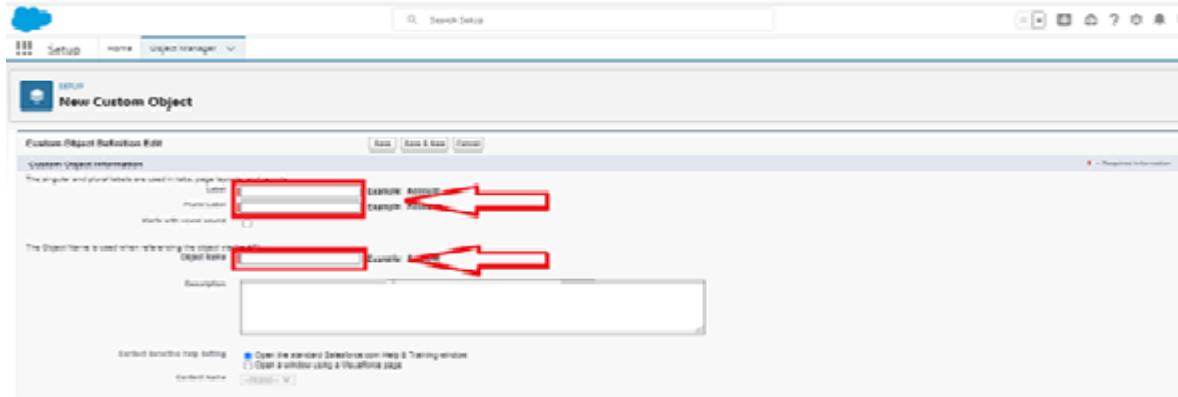
51+ Items, Sorted by Label

Quick Find Schema Builder Create ▾

Custom Object

LABEL	API NAME	TYPE	DESCRIPTION	LAST MO
			Custom Object from Spreadsheet	

- 1) Enter the label name → Employee
- 2) Plural label name → Employees



Setup Home Object Manager ▾

New Custom Object

Custom Object Definition Edit

System Status Information

The singular and plural labels are used in field page layouts.

Plural Label: Employee

Label: Employees

The Object Name is used when referencing the object in API requests.

Object Name: Employee

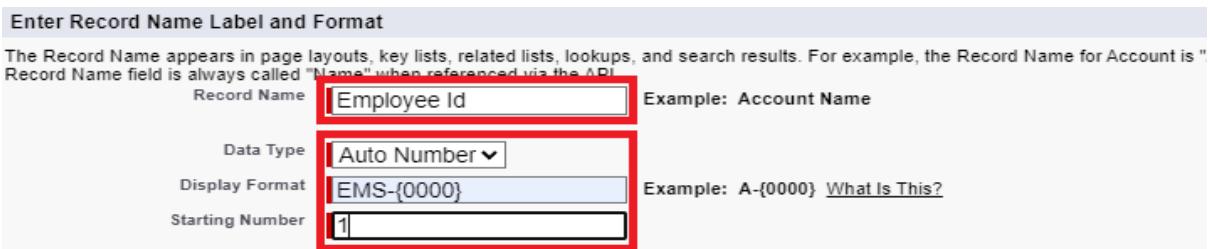
Description:

Standard Description Page Setting: Open the standard Salesforce.com Help & Training window

General Information: [Edit]

- 3) Enter Record Name Label and Format

- Record Name → Employee ID
- Data Type → Auto Number
- Display Format → EMS-{0000}
- 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 "Account Name".

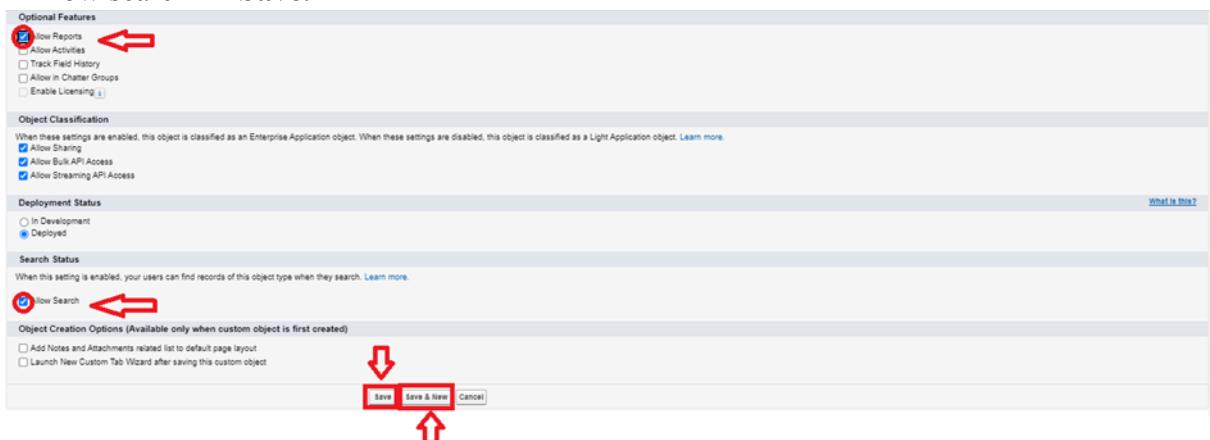
Record Name: Employee Id Example: Account Name

Data Type: Auto Number Example: A-{0000} What Is This?

Display Format: EMS-{0000}

Starting Number: 1

2. Click on Allow reports,
3. Allow search → Save.



Optional Features

Allow Reports

Allow Activities

Track Field History

Allow in Chatter Groups

Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

Allow Sharing

Allow Bulk API Access

Allow Streaming API Access

Deployment Status

In Development

Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout

Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

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
 - Record Name → Project ID
 - Data Type → Auto Number
 - Display Format → Proj-{0000}
 - Starting Number → 1
2. Click on Allow reports,
3. Allow search → **Save**

Activity 3: Create 3 more objects with label names as ProjectTask, and , Asset Service.

Note: use “Text” as a data type and label Record Name as “Project Task Name”.

Milestone 3 - 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

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 content such as Google maps or news feeds. Lightning Component tabs allow you to add Lightning components to the navigation bar. You can also allow users to 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.



Activity 2:

To create a 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:

Now create tabs for Project Task, Asset, Asset Services objects.

Milestone 4- 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.

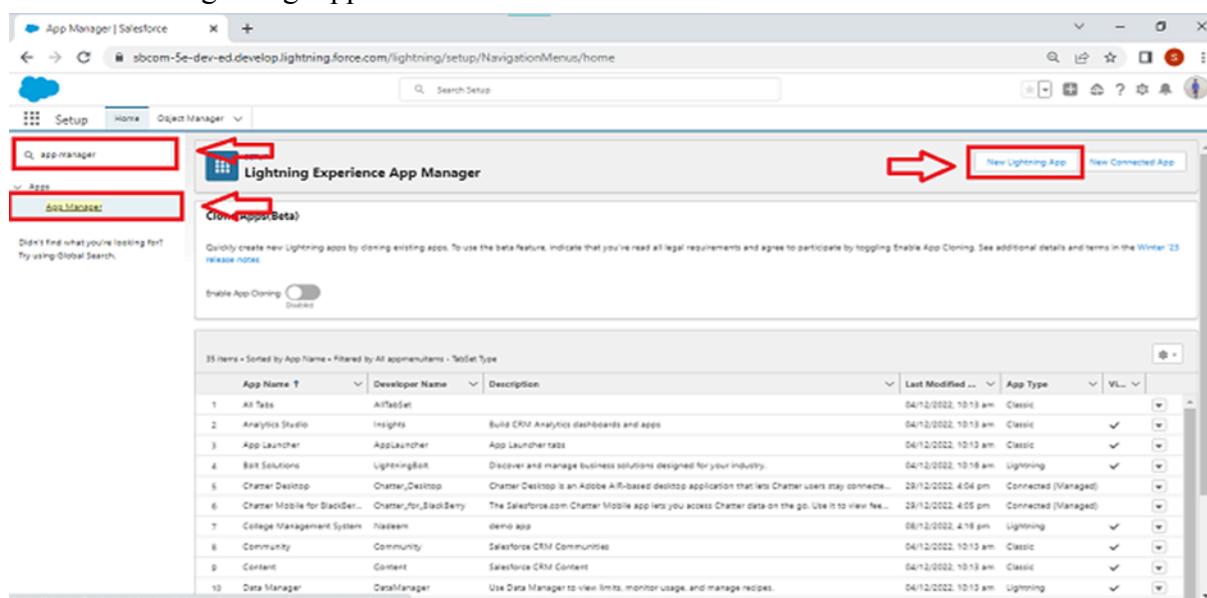
Use Case:

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 Salesforce App Manager interface. On the left, there are two red boxes highlighting the 'Q_ app manager' and 'AppManager' buttons in the sidebar. In the center, there is a red box highlighting the 'Lightning Experience App Manager' button. On the right, there is a red box highlighting the 'New Lightning App' button. Below these buttons is a table listing various apps, with the first few rows shown below:

App Name	Developer Name	Description	Last Modified	App Type
All Tabs	AltfabSet	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
Analytics Studio	Insights	Discover and manage business solutions designed for your industry	04/12/2022, 10:13 am	Classic
App Launcher	Applauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic
Bolt Solutions	Lightningbolt	Charter Desktop	04/12/2022, 10:18 am	Lightning
Charter Desktop	Charter/Desktop	Charter Desktop is an Adobe AIR-based desktop application that lets Charter users stay connected...	29/12/2022, 4:04 pm	Connected (Managed)
Charter Mobile for BlackBerry	CharterForBlackBerry	The Salesforce.com Charter Mobile app lets you access Charter data on the go. Use it to view fe...	29/12/2022, 4:05 pm	Connected (Managed)
College Management System	Nadeem	demo app	08/12/2022, 4:16 pm	Lightning
Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:13 am	Lightning

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

App Name : Workforce Administrator Solution

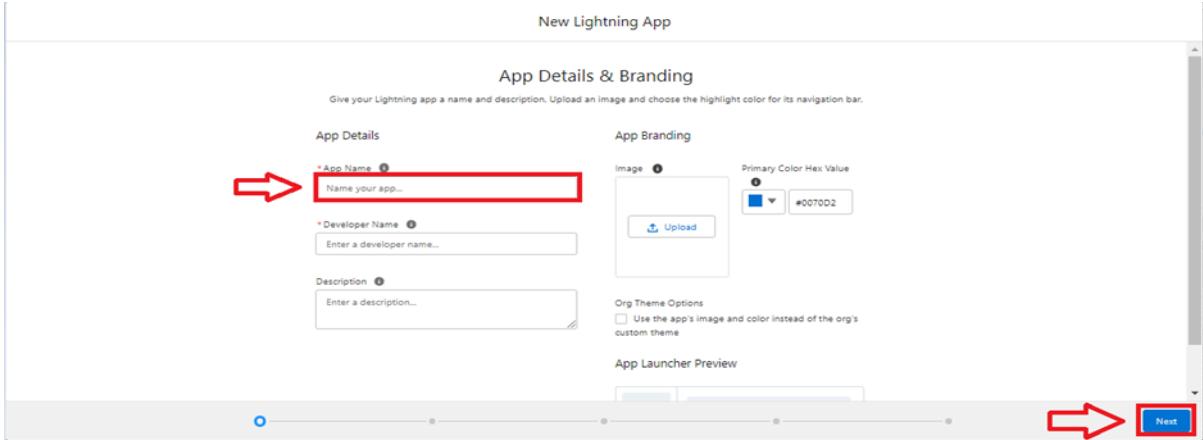
Developer Name : this will auto populated

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.



New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

- App Name**: Name your app... (highlighted with a red box)
- Developer Name**: Enter a developer name...
- Description**: Enter a description...

App Branding

- Image**:
- Primary Color Hex Value**: #0070D2

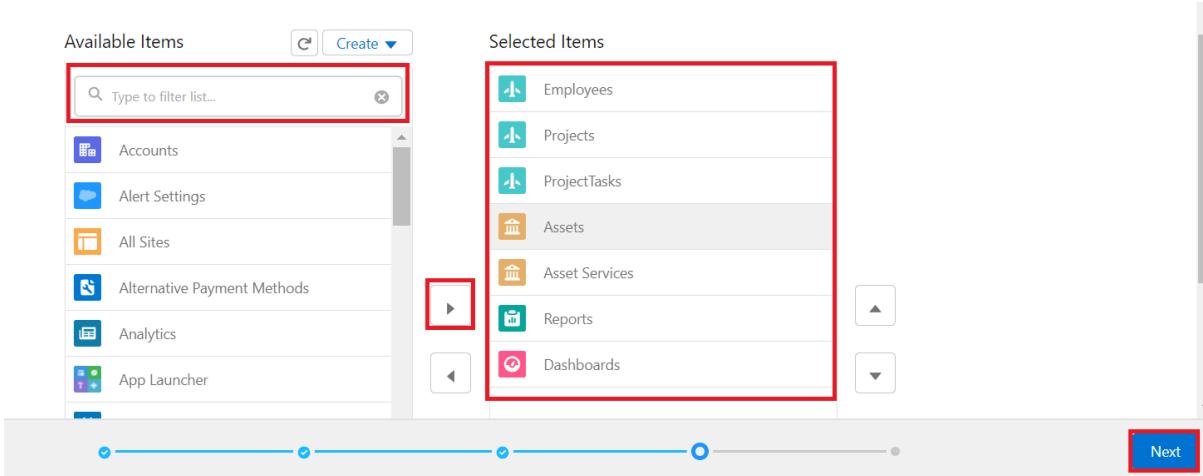
Org Theme Options

- Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

4. To Add Navigation Items:



Available Items

Type to filter list...

- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher

Selected Items

- Employees
- Projects
- ProjectTasks
- Assets
- Asset Services
- Reports
- Dashboards

Next

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.

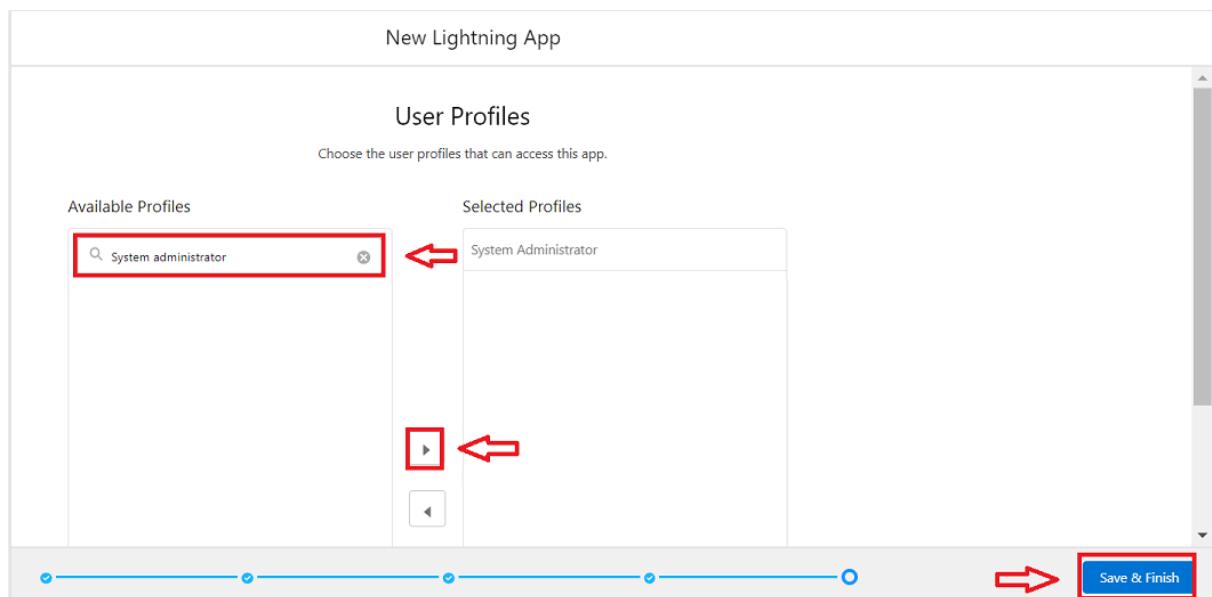
5. To Add User Profiles:

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles	Selected Profiles
<input type="text" value="System administrator"/> <input type="button" value="X"/>	<input checked="" type="checkbox"/> System Administrator



Search profiles (System administrator) in the search bar → click on the arrow button → save & finish.

Milestone 5 : Fields

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,

- Created By
- Owner
- Last Modified
- 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:

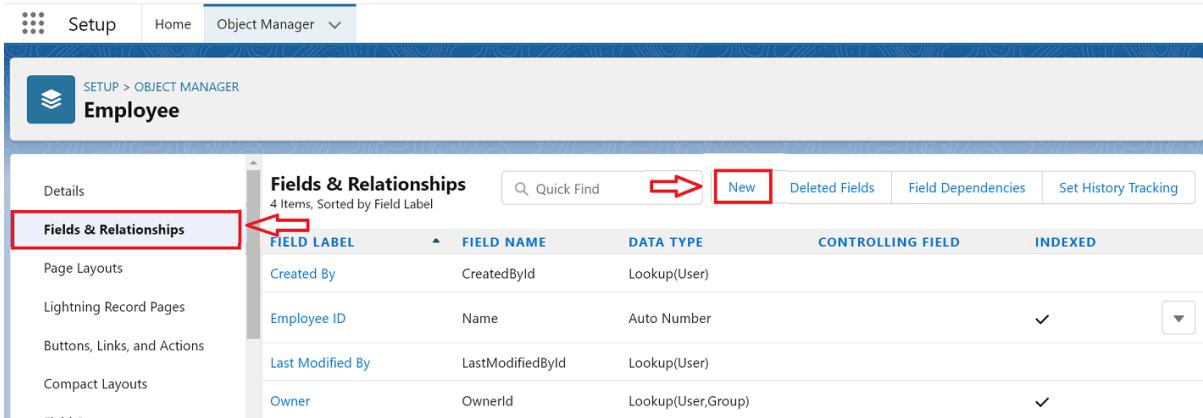
1. Go to setup → click on Object Manager → type object name(Employee) in quick find bar→ click on the object.



The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the search bar with the text 'Employee'. A third red box highlights the 'Employee' label in the table header.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Employee	Employee_c	Custom Object		20/06/2023	✓

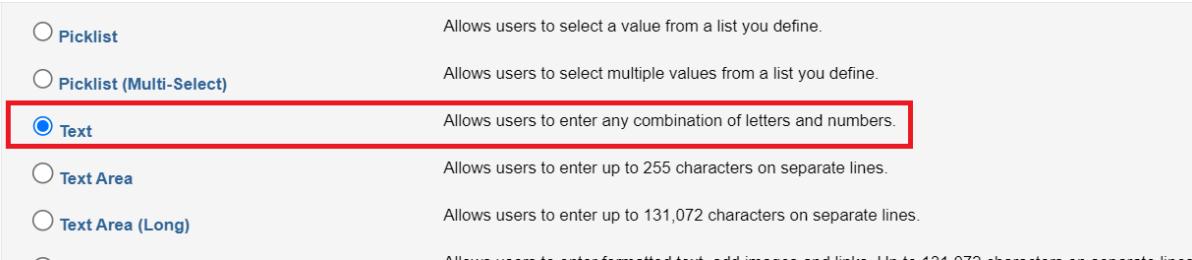
2. Now click on “Fields & Relationships” → New



The screenshot shows the 'Fields & Relationships' section of the Employee object setup. A red box highlights the 'Fields & Relationships' button in the sidebar. Another red box highlights the 'New' button at the top right of the list table. The table lists several fields with their details.

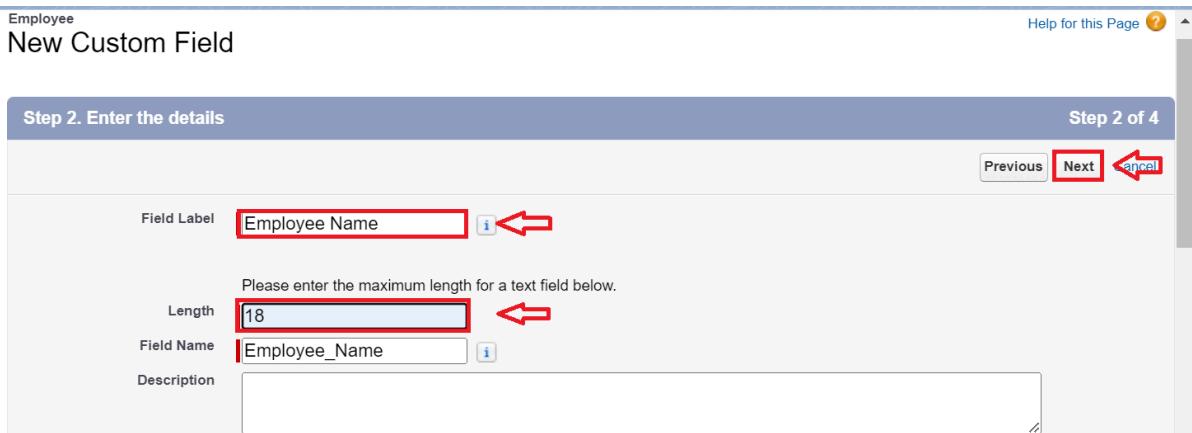
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee ID	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

3. Select Data type as “Text”.



The screenshot shows the 'Text' field configuration options. A red box highlights the 'Text' radio button. The description for 'Text' is: 'Allows users to enter any combination of letters and numbers.' Other options shown are Picklist, Picklist (Multi-Select), Text Area, and Text Area (Long).

4. Click on Next



The screenshot shows the 'Step 2. Enter the details' screen. A red box highlights the 'Field Label' input field with the value 'Employee Name'. Another red box highlights the 'Length' input field with the value '18'. The 'Field Name' input field has the value 'Employee_Name'. The 'Description' field is empty.

5. Fill the above as following:

- Field Label: Employee Name
- Length : 18
- Field Name : gets auto generated
- Click on Next → Next → Save and new.

Activity 2 : Creating Date of Birth Field in Employee Object

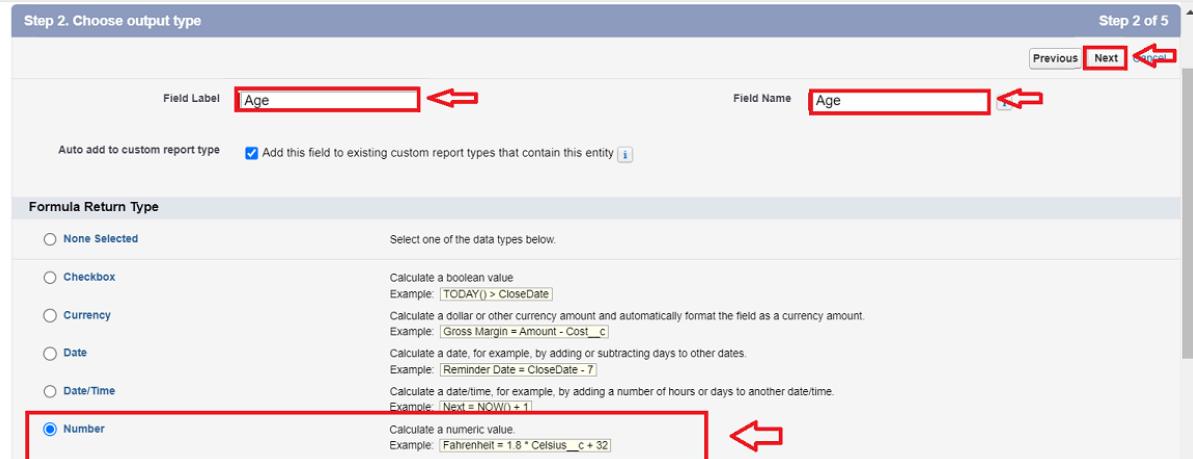
1. Repeat step 1 and 2 mentioned in activity 1
2. Select Data type as “Date” and click Next.

<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

5. Repeat step 1 and 2 mentioned in activity 1
6. Select Data type as “Formula” and click Next.
7. Give Field Label and Field Name as “Age” and select formula return type as “Number” and click next.



Step 2. Choose output type

Step 2 of 5

Previous **Next**

Field Label **Age**

Field Name **Age**

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

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 date/time, for example, by adding a number of hours or days to another date/time.
Example: `|Next = NOW() + 1|`

Number Calculate a numeric value.
Example: `|Fahrenheit = 1.8 * Celsius__c + 32|`

8. 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 + 32 [More Examples](#)

Simple Formula Advanced Formula

Insert Field Insert Operator ▾

Age (Number)
YEAR(TODAY()) - YEAR(Date_of_Birth__c)

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

Description

Step 3 of 5 Previous Next Cancel

Quick Tips

- Getting Started
- Operators & Functions

Functions

All Function Categories ▾

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

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

Field Label [i](#)

Values Use global picklist value set Enter values, with each value separated by a new line

Male
Female

Display values alphabetically, not in the order entered
 Use first value as default value [i](#)
 Restrict picklist to the values defined in the value set [i](#)

Field Name [i](#)

Description

Help Text

Step 2 of 4 Previous Next Cancel

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

Select the other object to which this object is related.

Related To [i](#)

Step 2 Previous Next Cancel

4. Give Field Label as “Reports to” and click Next.

5. Next → Next → Save & New.

Activity 6 : Master-Detail Relationship

Creating Master-Detail Relationship between Employee & ProjectTask 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	• Qualification	Text
		• Address	Text Area
		• Experience	Text Area
		• Phone no	Phone
		• Email	Email
		• Joining date	Date
		• Mode of Work	Picklist: Values On Site Remote
		• Cab Allowance	Check box
		• Food Allowances	Check box
		• Wifi Allowances	Check box
		• Cab Allowance Amount	Currency

		<ul style="list-style-type: none"> • Food Allowance Amount • Wifi Allowance Amount • Login Time • Logout Time • LinkedIn Profile 	Currency Currency Time Time url				
2	Project	<table border="1"> <thead> <tr> <th>Field Name</th><th>Data type</th></tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> • Project Name • Project Lead • Start Date • End Date • Project Status </td><td> Text Text Date Date 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	<ul style="list-style-type: none"> • Project Name • Project Lead • Start Date • End Date • Project Status 	Text Text Date Date Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Completed On Going Not Yet Started </div>	
Field Name	Data type						
<ul style="list-style-type: none"> • Project Name • Project Lead • Start Date • End Date • Project Status 	Text Text Date Date Picklist: Values <div style="border: 1px solid black; padding: 5px; display: inline-block;"> Completed On Going Not Yet Started </div>						
3	ProjectTask	<table border="1"> <thead> <tr> <th>Field Name</th><th>Data type</th></tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> • Project Task • Finishes in • Working Hours • Employee Name </td><td> MDR with project object Formula : <code>(Project_Task__r.Start_Date__c - Project_Task__r.End_Date__c)</code> Formula return type: Number Numbers Master Detail relationship with Employee object </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	<ul style="list-style-type: none"> • Project Task • Finishes in • Working Hours • Employee Name 	MDR with project object Formula : <code>(Project_Task__r.Start_Date__c - Project_Task__r.End_Date__c)</code> Formula return type: Number Numbers Master Detail relationship with Employee object	
Field Name	Data type						
<ul style="list-style-type: none"> • Project Task • Finishes in • Working Hours • Employee Name 	MDR with project object Formula : <code>(Project_Task__r.Start_Date__c - Project_Task__r.End_Date__c)</code> Formula return type: Number Numbers Master Detail relationship with Employee object						
		<table border="1"> <thead> <tr> <th>Field Name</th><th>Data type</th></tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> • Asset Id </td><td>Lookup relationship with Asset object</td></tr> </tbody> </table>	Field Name	Data type	<ul style="list-style-type: none"> • Asset Id 	Lookup relationship with Asset object	
Field Name	Data type						
<ul style="list-style-type: none"> • Asset Id 	Lookup relationship with Asset object						

4	Asset Service	<ul style="list-style-type: none"> ● Type ● Technician ● Subject ● Description 	Picklist: Values <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> Technical Issue Non Technical Issue </div> <div style="margin-top: 10px;"> Text Text Area Text Long </div>				
5	Asset	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: center; padding: 5px;">Field Name</th><th style="text-align: center; padding: 5px;">Data type</th></tr> </thead> <tbody> <tr> <td style="padding: 5px;"> <ul style="list-style-type: none"> ● Asset Type ● Model Name ● Employee Name ● Date Of Issue </td><td style="padding: 5px;"> Picklist: Values <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> Laptop Charger Mouse Monitor CPU </div> <div style="margin-top: 10px;"> Text Lookup relationship with Employee Object Formula (Joining date) Formula Return type: date </div> </td></tr> </tbody> </table> <p>Note: here in the Date of Issue field, the Joining date field belongs to the Employee Object.</p>	Field Name	Data type	<ul style="list-style-type: none"> ● Asset Type ● Model Name ● Employee Name ● Date Of Issue 	Picklist: Values <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> Laptop Charger Mouse Monitor CPU </div> <div style="margin-top: 10px;"> Text Lookup relationship with Employee Object Formula (Joining date) Formula Return type: date </div>	
Field Name	Data type						
<ul style="list-style-type: none"> ● Asset Type ● Model Name ● Employee Name ● Date Of Issue 	Picklist: Values <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> Laptop Charger Mouse Monitor CPU </div> <div style="margin-top: 10px;"> Text Lookup relationship with Employee Object Formula (Joining date) Formula Return type: date </div>						

Milestone 6 : 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-

- Public Read/Write/Transfer
- Public Read/Write
- Public Read/Only
- Private

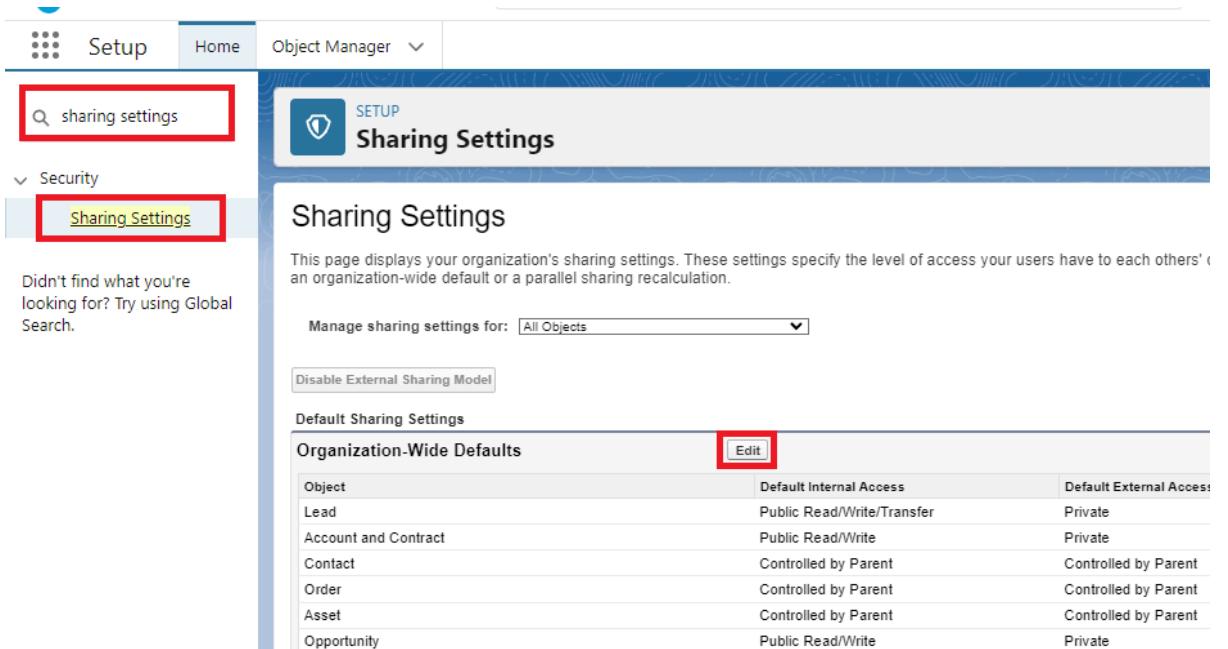
Use Case:

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 Setup interface. In the top navigation bar, 'Setup' is selected. Below it, a search bar contains 'sharing settings'. Under the 'Security' section, a link labeled 'Sharing Settings' is highlighted with a red box. On the right, the 'Sharing Settings' page is displayed. At the top of this page, a sub-header says 'Sharing Settings'. Below it, a note states: 'This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' objects on an organization-wide default or a parallel sharing recalculation.' A dropdown menu 'Manage sharing settings for:' is set to 'All Objects'. A 'Disable External Sharing Model' button is present. The main section is titled 'Default Sharing Settings' and contains a table for 'Organization-Wide Defaults'. The table has columns for 'Object', 'Default Internal Access', and 'Default External Access'. An 'Edit' button is located at the top right of this table. The table data is as follows:

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.

	Default	External	Grant Access
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset	Public Read/Write	Private	<input checked="" type="checkbox"/>
Asset Service	Public Read/Write	Private	<input checked="" type="checkbox"/>
Employee	Private	Private	<input checked="" type="checkbox"/>
Project	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Other Settings	Standard Report Visibility <input checked="" type="checkbox"/> i		
	Manual User Record Sharing <input type="checkbox"/> i Manager Groups <input type="checkbox"/> i		
	<input type="button" value="Save"/> <input type="button" value="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.

Milestone 7 - User Adoption

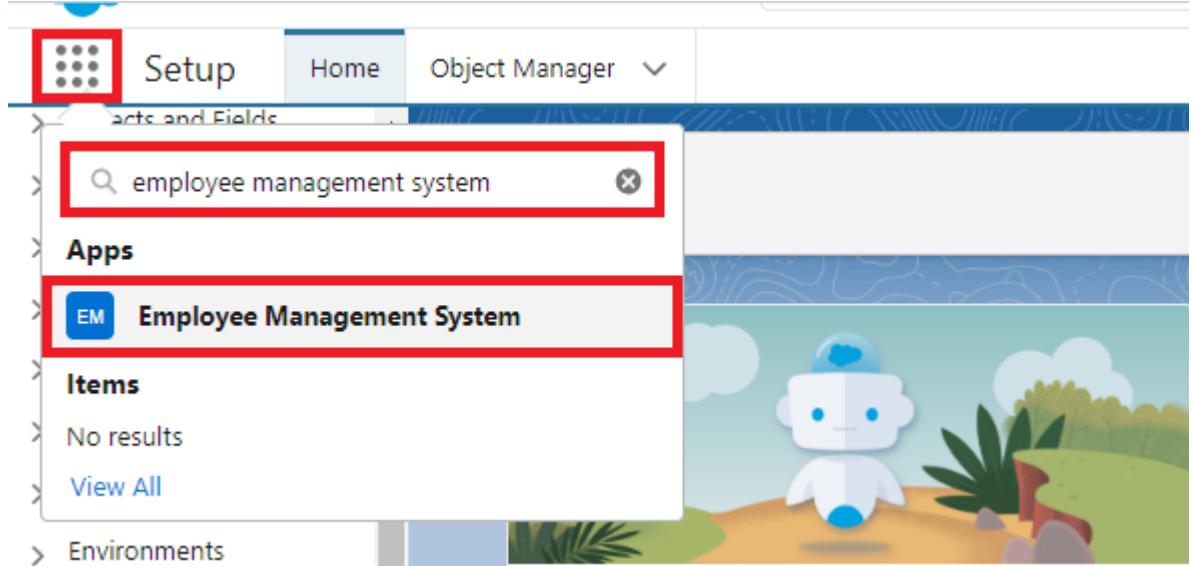
Use Case:

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.

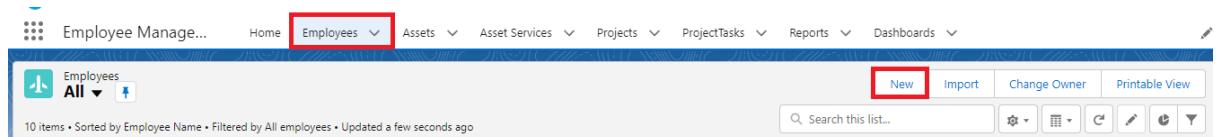
Activity 1:

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.

Activity 4:

Create at least 10 records for each of the objects: Asset, Project, Project Task, Asset Service.

Milestone 8 - 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.

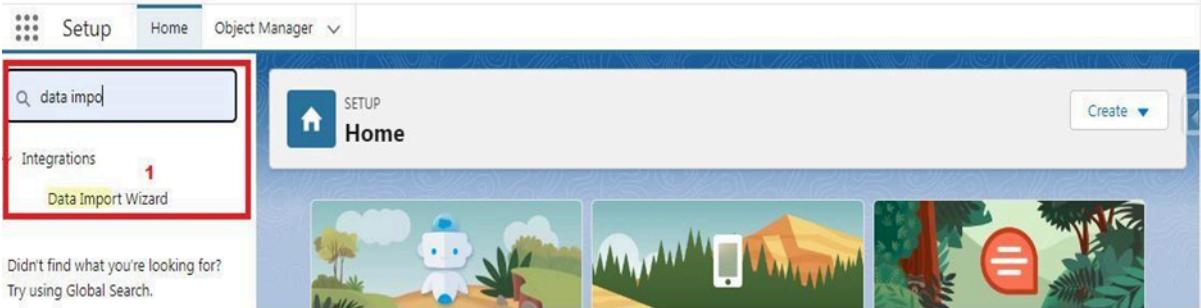
Use Case:

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.,

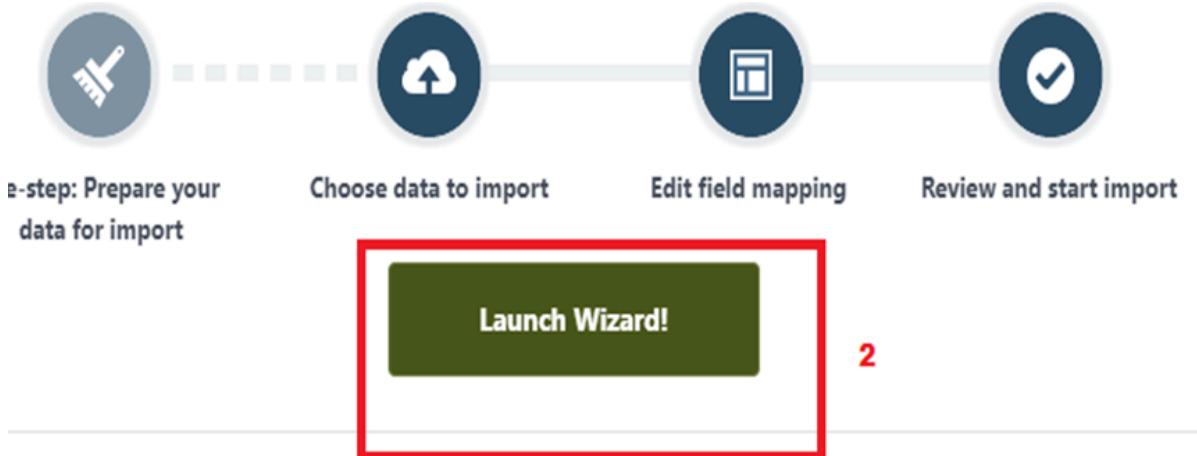
Activity-1:

1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard.

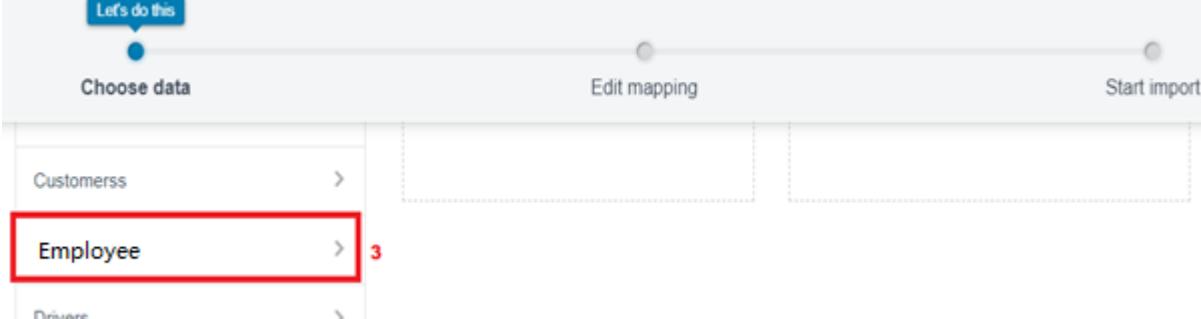


The screenshot shows the Salesforce Setup Home page. In the top left, there's a search bar with "data impo" typed in. Below it, a search result for "Data Import Wizard" is shown under the "Integrations" category. A red box highlights this result. The main area has a blue header "SETUP Home" with three decorative cards below it: one with a robot, one with a smartphone, and one with a jungle scene.

3. Click Launch Wizard!



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



The screenshot shows the "Choose data" step of the wizard. At the top, there are tabs: "Let's do this", "Choose data" (which is active), "Edit mapping", and "Start import". Below, there's a list of objects: "Customers", "Employee" (which is highlighted with a red box and red number 3), and "Drivers".

5. Select Add new records.

Import your Data into Salesforce

You can import up to 50,000 records at a time.

What kind of data are you importing? 

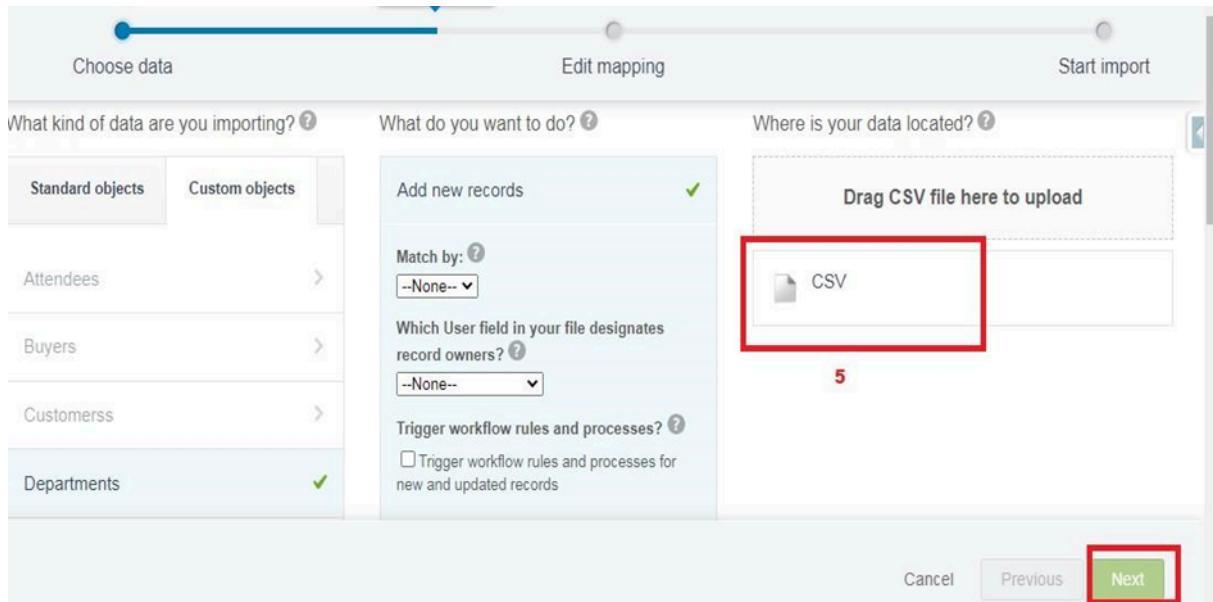
What do you want to do? 

Where is your data located? 

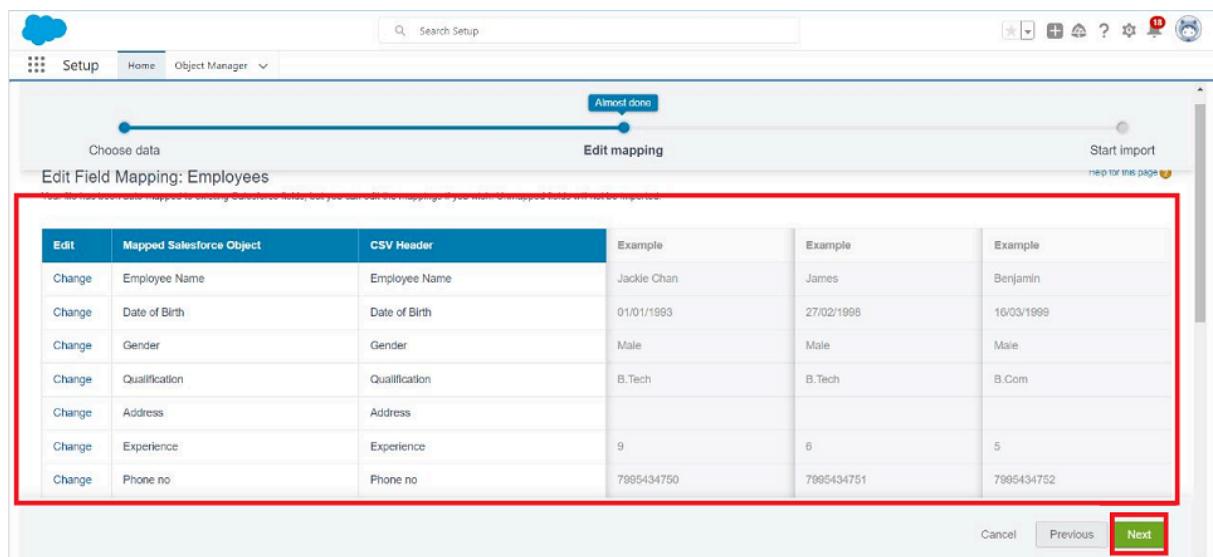


The screenshot shows the "What do you want to do?" section. It has three options: "Add new records" (which is highlighted with a red box and red number 4), "Update existing records", and "Add new and update existing records".

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

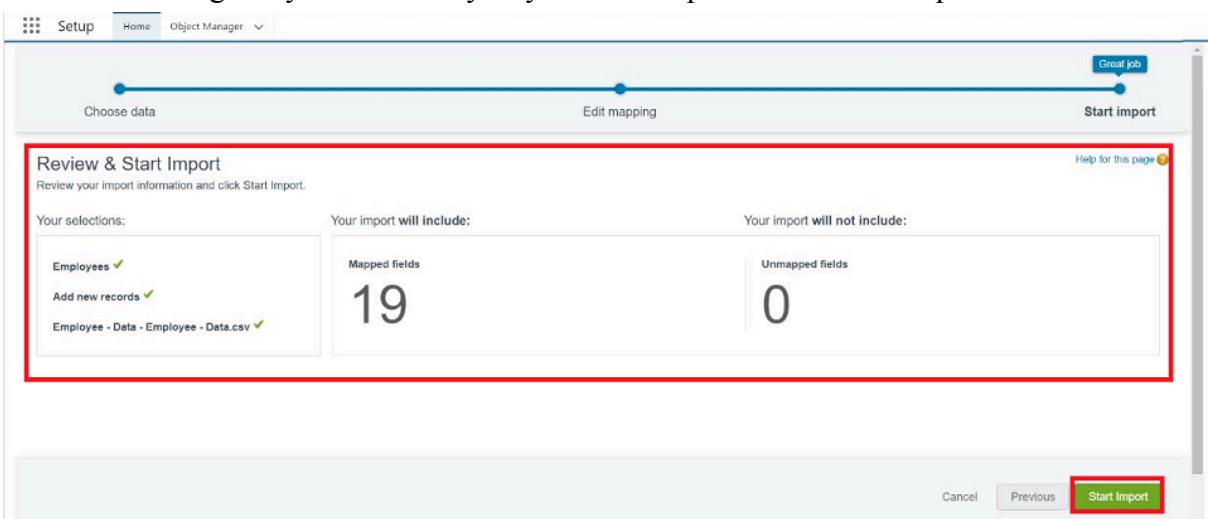


7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.



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.



Great job!

Review & Start Import

Review your import information and click Start Import.

Your selections:	Your import will include:	Your import will not include:
Employees ✓ Add new records ✓ Employee - Data - Employee - Data.csv ✓	Mapped fields 19	Unmapped fields 0

Cancel Previous **Start Import**

9. Click OK on the popup.

Congratulations, your import has started!
 Click OK to view your import status on the Bulk Data Load Job page.



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	Error Count	State Message	Status
V1015100000JeYH4	View Request	View Result	7515100000JeYH4	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.

Milestone 9 : 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.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- 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.

Custom Object Permissions						
	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

Custom Object Permissions						
	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.

Milestone 10 : 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.

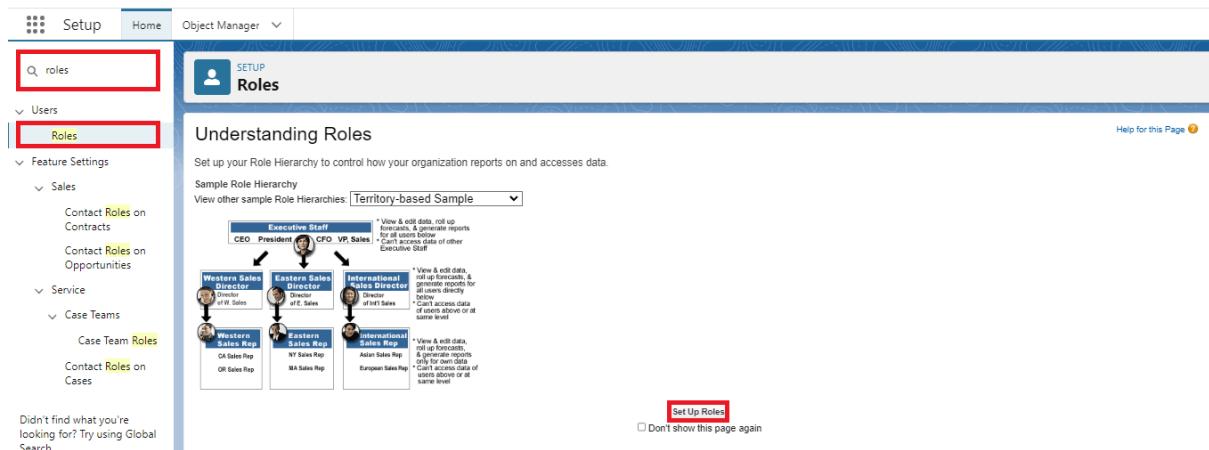
Use Case:

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.



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

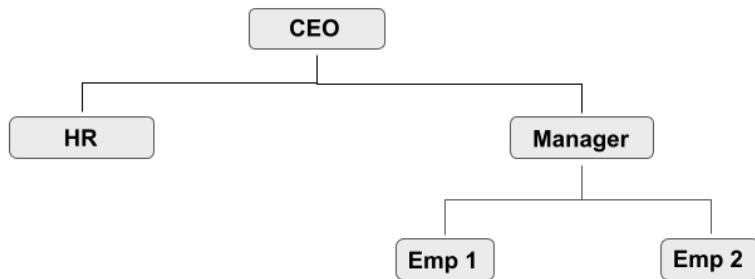


3. Give Label as "HR" and Role name gets auto populated. Check to whom this role (HR) reports. Then click on Save.

Role Edit
New Role

Role Edit	
Label	<input type="text"/>
Role Name	<input type="text"/> <input type="button" value=""/>
This role reports to	<input type="text" value="CEO"/> <input type="button" value=""/>
Role Name as displayed on reports	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="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:

Create three more roles for Manager, On Site Employee, Remote Employee.

Note: On Site Employee and Remote Employee reports to Manager.

Milestone 11 : 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:

- Username
- Email Address
- User's First Name (optional)
- User's Last Name
- Alias
- Nickname
- License
- Profile
- Role (optional)

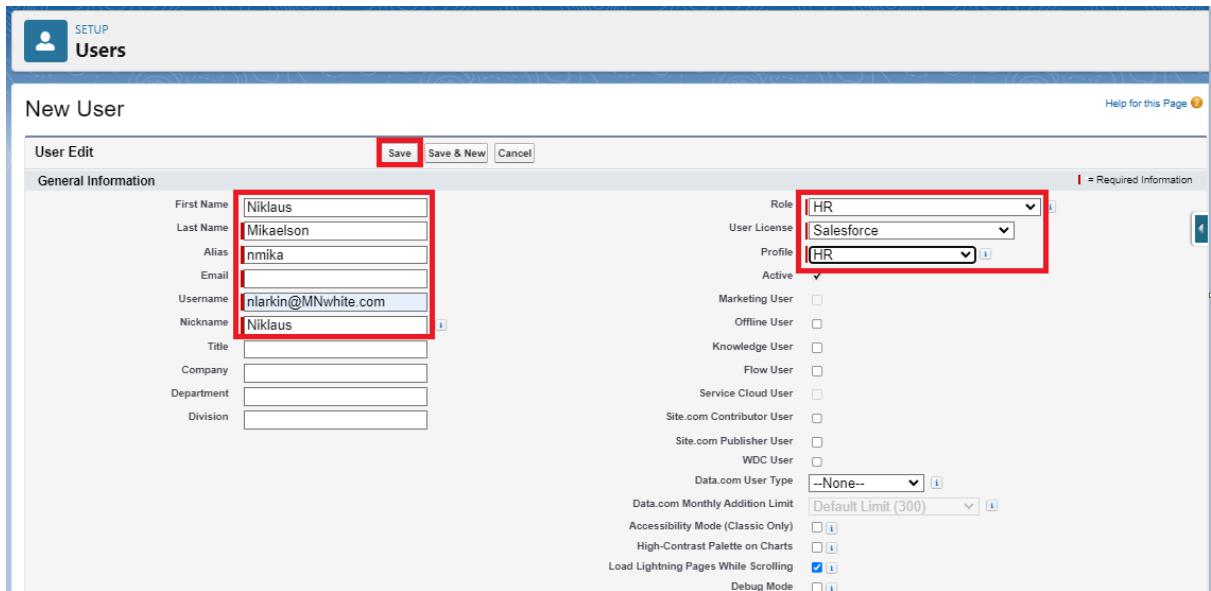
Use Case:

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



New User

User Edit Save Save & New Cancel

General Information

First Name	Niklaus
Last Name	Mikaelson
Alias	nmika
Email	
Username	nmarkin@MNwhite.com
Nickname	Niklaus
Title	
Company	
Department	
Division	

Role: HR
User License: Salesforce
Profile: HR
Active:

Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type:

Accessibility Mode (Classic Only)
High-Contrast Palette on Charts
Load Lightning Pages While Scrolling
Debug Mode

3. Save.

Activity 2:

1. Go to setup → type users in quick find box → select users → click New user.
2. Fill in the fields
 - First Name : Kol
 - Last Name : Mikaelson
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.text
 - Nick Name : Give a Nickname
 - Role : Manager
 - User license : Salesforce Platform
 - Profiles : Manager
3. Save.

Activity 3:

Create two more users as mentioned in activity 2.

Milestone 12 : 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.

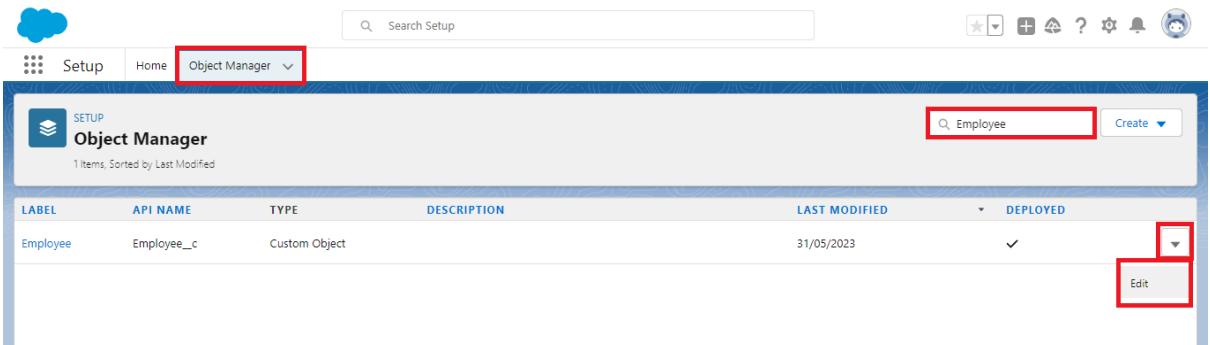
Use Case:

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 :

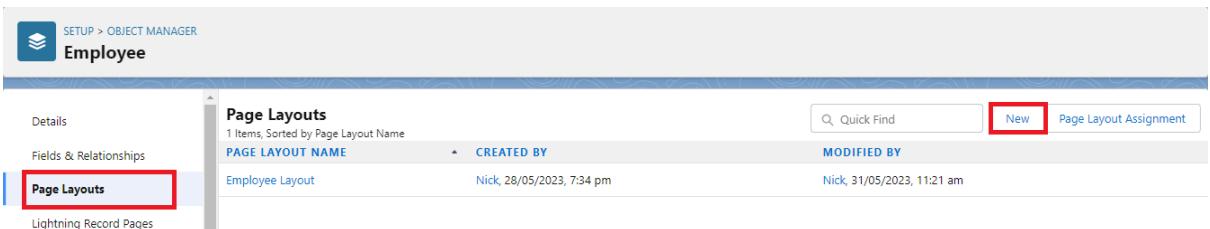
To Create a Page layout:

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 for the 'Employee' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Employee'. In the main area, there is a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. One row is visible for 'Employee' (API Name: Employee_c, Type: Custom Object). The 'Edit' button in the top right corner of the table row is highlighted with a red box.

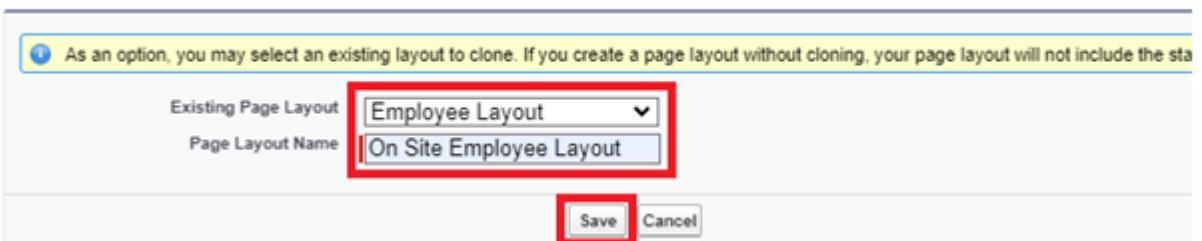
2. Click on Page layout → Click on New.



The screenshot shows the 'Page Layouts' section within the 'Employee' object's setup. On the left, a sidebar has 'Page Layouts' selected. The main area displays a table with columns: PAGE LAYOUT NAME, CREATED BY, and MODIFIED BY. One entry is shown: 'Employee Layout' created by 'Nick' on 28/05/2023 and modified by 'Nick' on 31/05/2023. The 'New' button in the top right corner is highlighted with a red box.

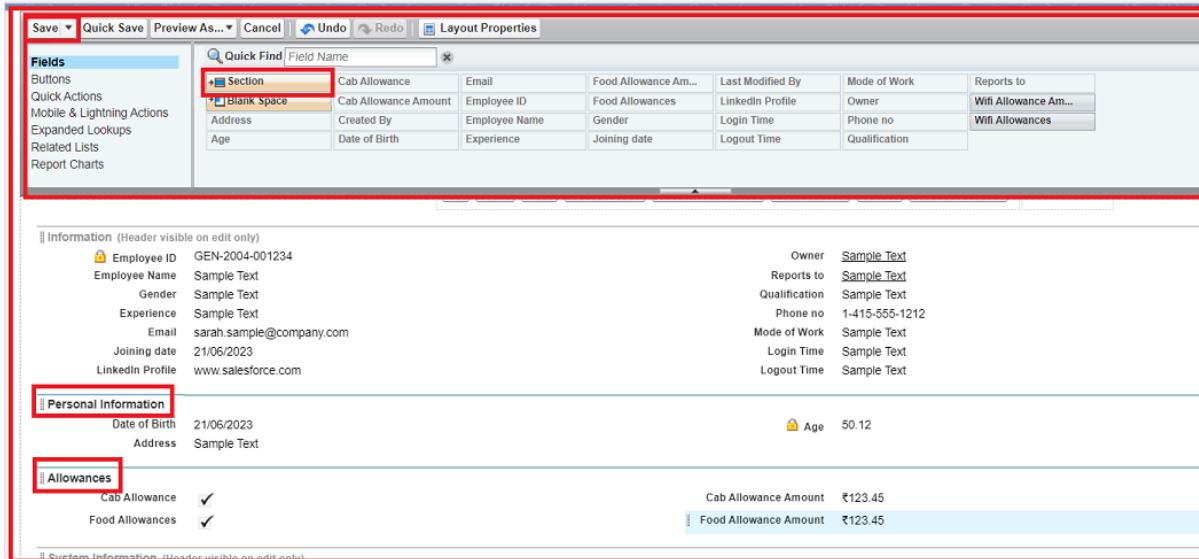
3. Give Page layout Name as “On Site Employee Layout” and click on Save.

Create New Page Layout



The screenshot shows the 'Create New Page Layout' dialog. It includes a note about cloning layouts. Two input fields are highlighted with red boxes: 'Existing Page Layout' (containing 'Employee Layout') and 'Page Layout Name' (containing 'On Site Employee Layout'). At the bottom, the 'Save' button is also 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.



The screenshot shows the Smart Internz page layout editor interface. At the top, there's a toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below the toolbar is a 'Fields' panel on the left containing options like Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. A 'Section' item is highlighted with a red box. The main area displays a table of fields:

	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	

Below the table, the page layout structure is shown:

- 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	21/06/2023	Login Time	Sample Text
LinkedIn Profile	www.salesforce.com	Logout Time	Sample Text
- Personal Information**

Date of Birth	21/06/2023	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 :

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.

Milestone 13 : 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.

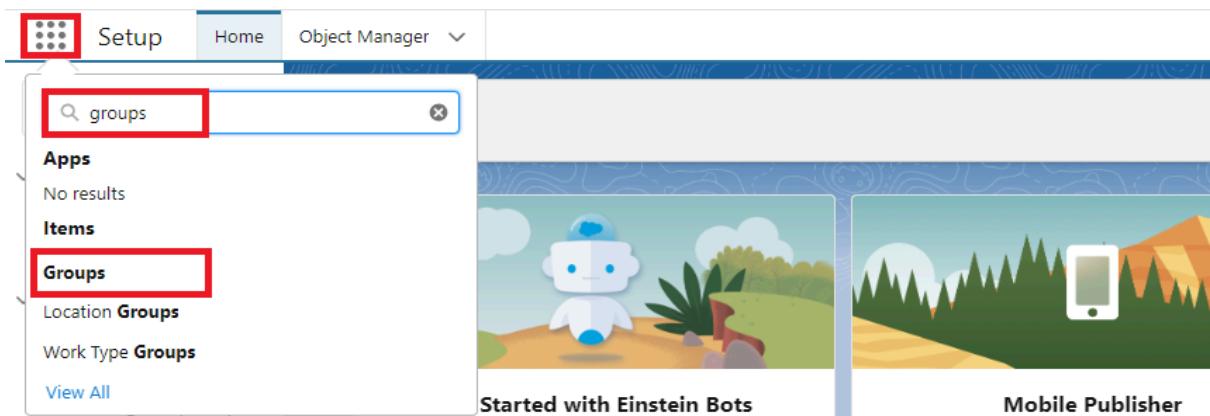
Use Case:

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.

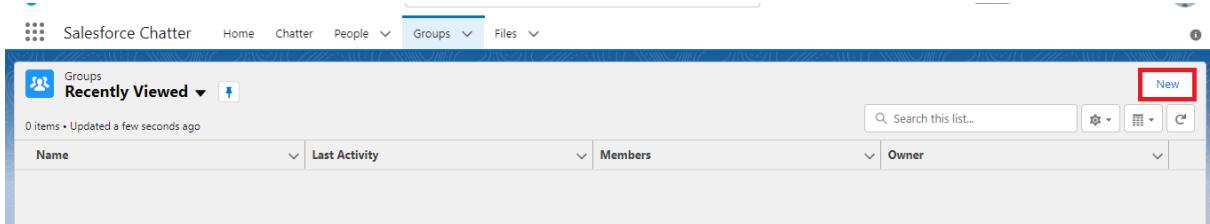
Activity 1 :

Creating a chatter group for your organization.

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

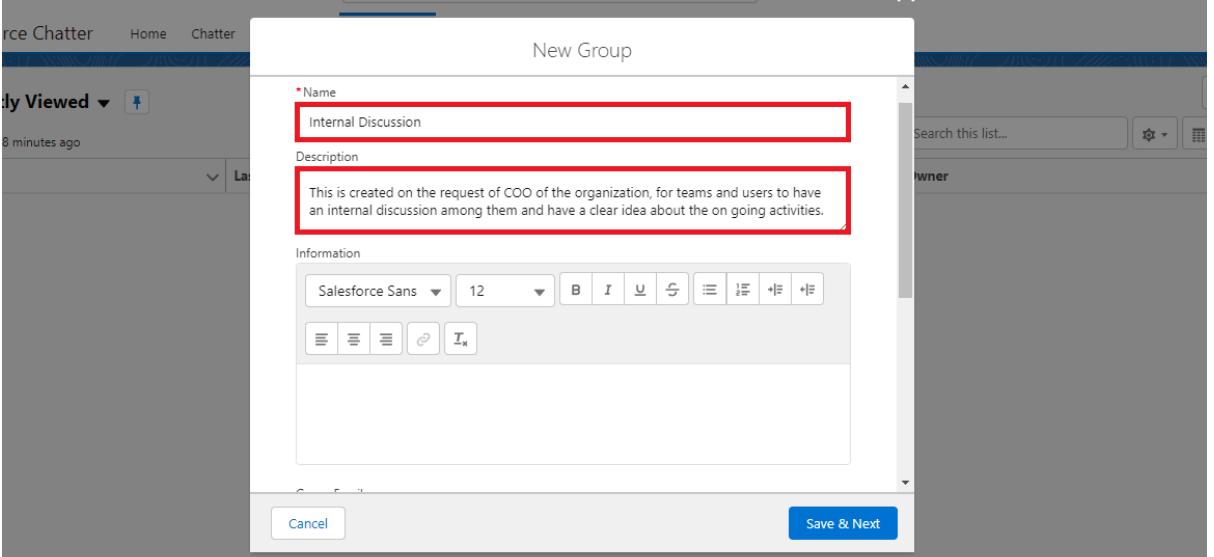


3. Click New.



4. Fill in the new group information with these details:

Field	Value
<ul style="list-style-type: none"> Group Name Description Access Type Allow Customers 	Internal Discussion Give a understanding Description on your own Private Checked



New Group

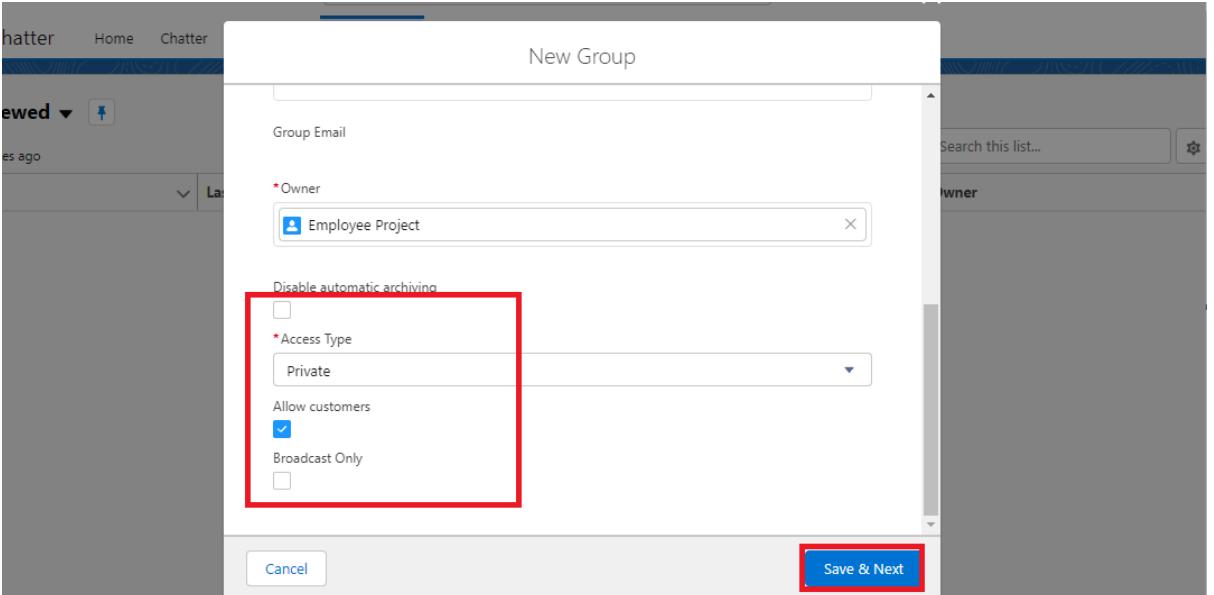
*Name
Internal Discussion

Description
This is created on the request of COO of the organization, for teams and users to have an internal discussion among them and have a clear idea about the on going activities.

Information

Salesforce Sans 12 B I U

Cancel Save & Next



New Group

Group Email

*Owner
Employee Project

Disable automatic archiving

*Access Type
Private

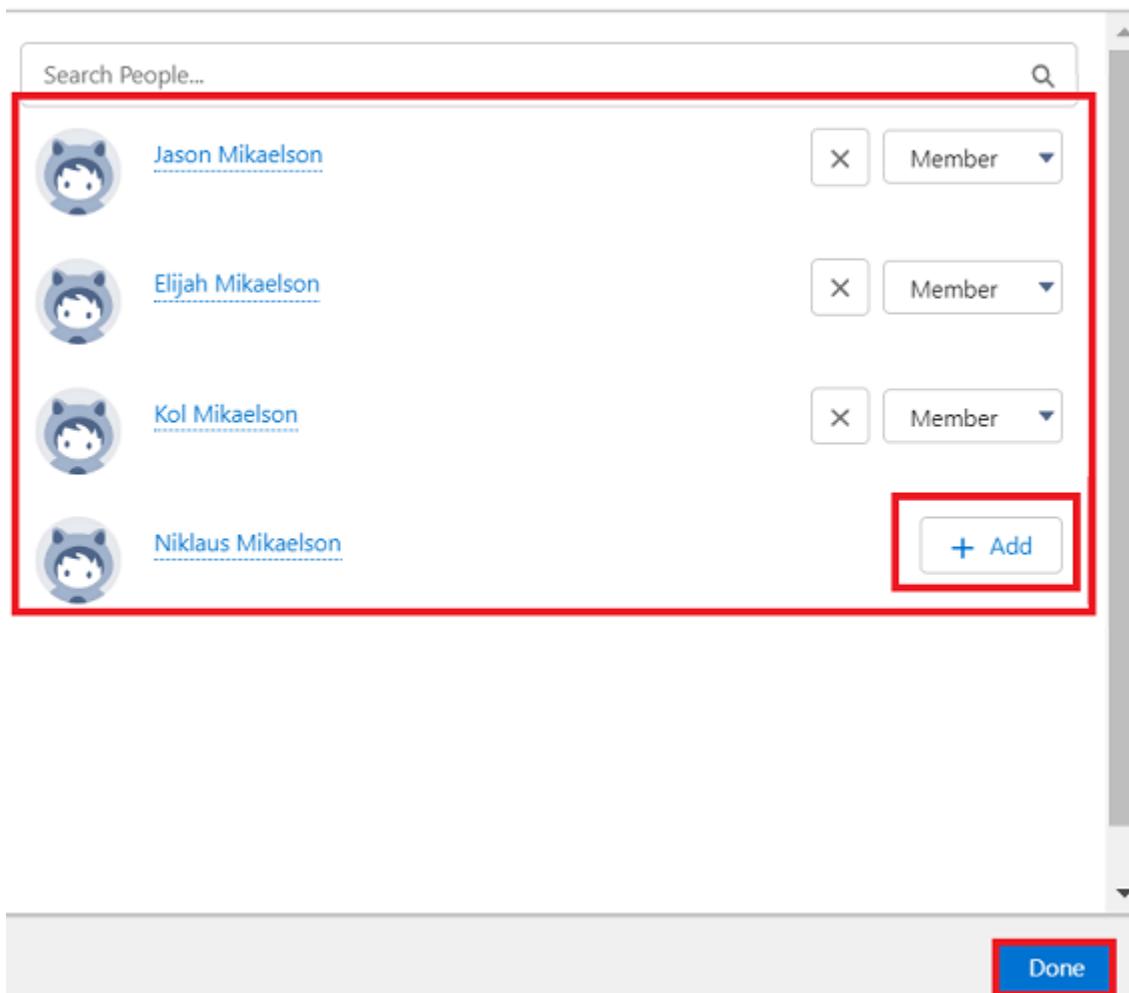
Allow customers

Broadcast Only

Cancel Save & Next

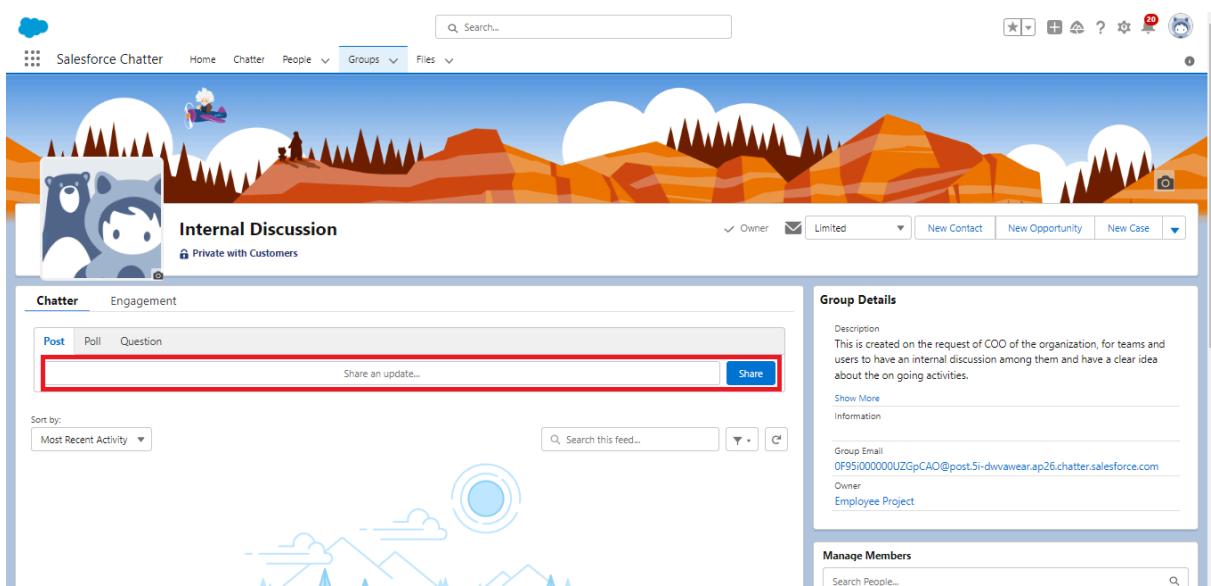
5. Click Save & Next. Skip the Upload Picture section and click Next.
6. On the Manage Members screen, click Add next to users you created in the previous activity.

Manage Members



The screenshot shows a list of four users under the heading 'Manage Members'. Each user entry includes a small profile icon, the user's name, and a status indicator. A red box highlights the entire list of users. To the right of the list, there is an 'Add' button, which is also highlighted with a red box.

7. Click Done.



The screenshot shows the Salesforce Chatter group interface for a group named 'Internal Discussion'. The group is described as 'Private with Customers'. The interface includes a 'Chatter' feed with a 'Post' button highlighted with a red box. On the right side, there is a 'Group Details' section with information about the group's owner, description, and a 'Manage Members' section with a search bar.

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.

Milestone 14 : 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:

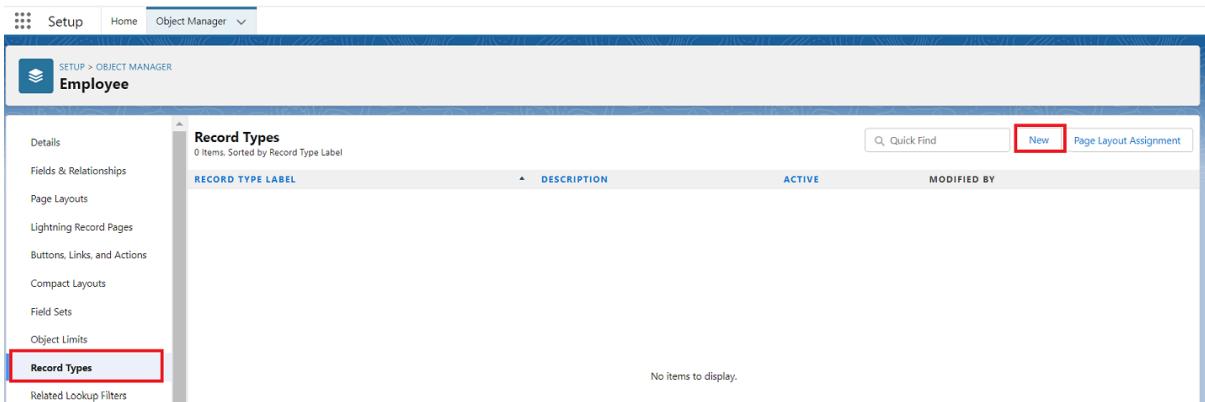
To create a Record Type:

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. At the top, there are tabs for SETUP, Home, and Object Manager, with Object Manager selected. A search bar contains the text "Employee". Below the search bar, a table lists one item: "Employee" (Label), "Employee__c" (API Name), and "Custom Object" (Type). To the right of the table, there are buttons for Schema Builder and Create. At the bottom right of the table, there are "Edit" and "Delete" buttons, both of which are highlighted with red boxes. The status bar at the bottom indicates "01/06/2023".

2. From the left panel click Record Types → New.

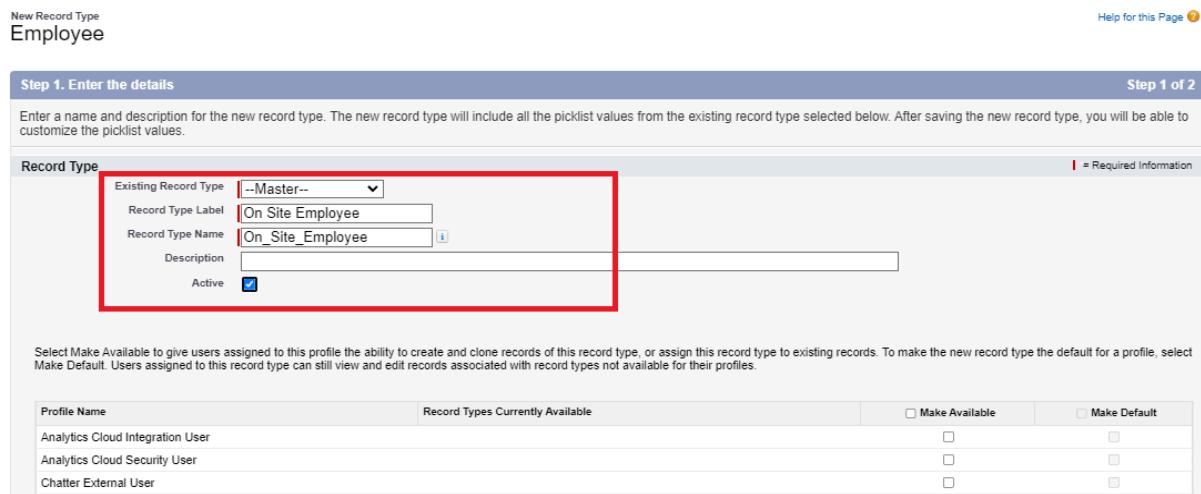


Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Record Types
0 Items. Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
No items to display.			

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



New Record Type
Employee

Help for this Page ⓘ

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--	I = Required Information	
Record Type Label	On Site Employee		
Record Type Name	On_Site_Employee		
Description			
Active	<input checked="" type="checkbox"/>		

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.

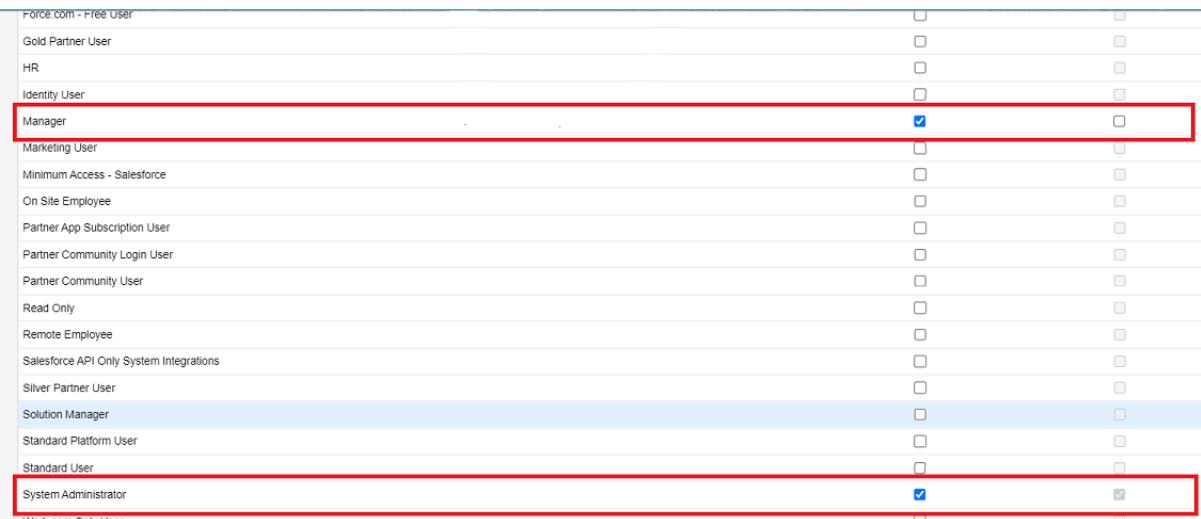
Profile Name	Record Types Currently Available	Make Available	Make Default
Analytics Cloud Integration User		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input type="checkbox"/>	<input type="checkbox"/>
Chatter External User		<input type="checkbox"/>	<input type="checkbox"/>

- 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"/>

- Scroll down and check for the Manager & System Administrator profile and click on Next.



Profile Name	Record Types Currently Available	Make Available	Make Default
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 OnInv User		<input type="checkbox"/>	<input type="checkbox"/>

- 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="button" value="-- Select Page Layout --"/> <input checked="" type="radio"/> Apply a different layout for each profile	
Profile:	Page Layout
Analytics Cloud Integration User	Employee Layout
Analytics Cloud Security User	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
Identity 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:

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.

Milestone 15 : 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.

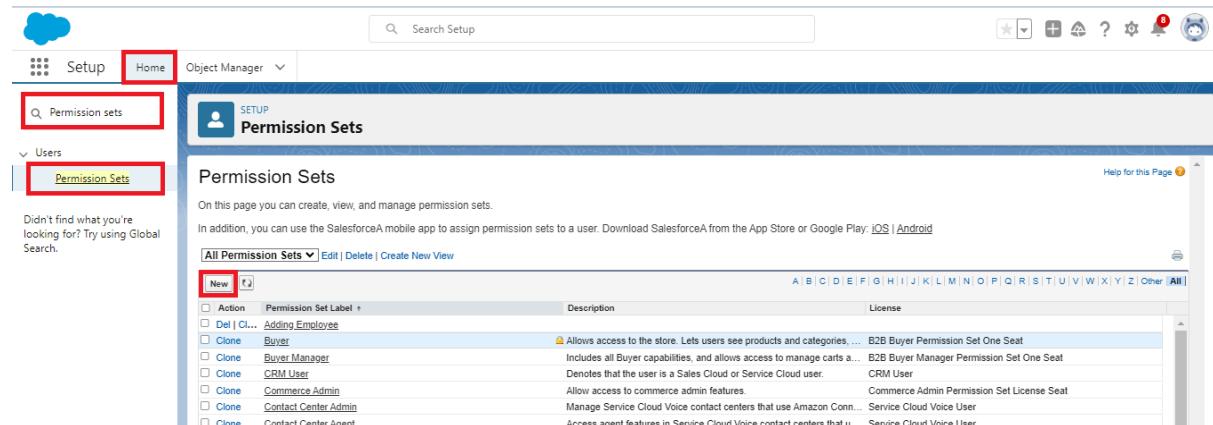
Use Case:

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:

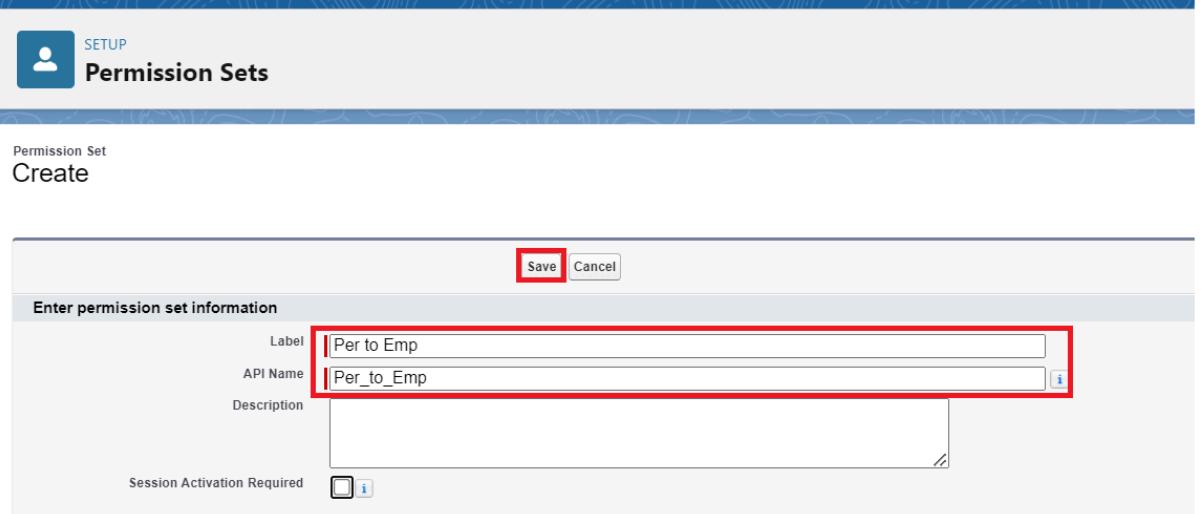
1. Go to setup → type “permission sets” in quick search → select permission sets → New.



The screenshot shows the Salesforce Setup interface. The top navigation bar has 'Setup' and 'Home' buttons, with 'Home' being the active tab. Below the navigation is a search bar labeled 'Search Setup'. On the left, there's a sidebar with 'Permission sets' and 'Permission Sets' under the 'Users' section, both of which are highlighted with red boxes. The main content area is titled 'Permission Sets' and contains a table with columns for 'Action', 'Permission Set Label', 'Description', and 'License'. At the top of the table, there's a 'New' button highlighted with a red box. The table lists several permission sets, such as 'Adding Employee', 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', 'Contact Center Admin', and 'Contact Center Agent'. Each row includes a checkbox for 'Action' and a link for 'Clone'. The 'Description' column provides a brief overview of each permission set, and the 'License' column indicates the specific license required for each.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Del Cl... Adding Employee	Allows access to the store. Lets users see products and categories, ...	E2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone Buyer	Includes all Buyer capabilities, and allows access to manage carts a...	E2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone Buyer Manager	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Clone CRM User	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone Commerce Admin	Manage Service Cloud Voice contact centers that use Amazon Conn...	Service Cloud Voice User
<input type="checkbox"/>	Clone Contact Center Admin	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
<input type="checkbox"/>	Clone Contact Center Agent		

2. Enter the label name as “Per to Emp” → save.



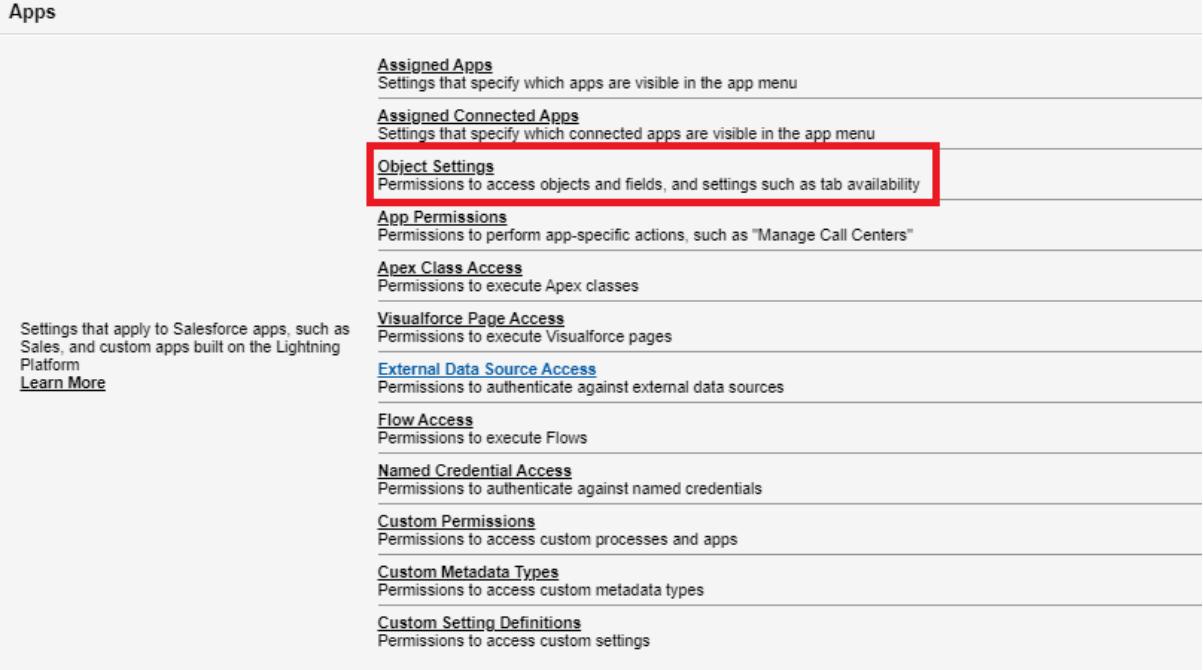
Permission Set
Create

Enter permission set information

Label	<input type="text" value="Per to Emp"/>
API Name	<input type="text" value="Per_to_Emp"/>
Description	<input type="text"/>
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.

 Setup  Home  Object Manager ▾

Q permission

Users  ... > SETUP > PERMISSION SET 'ADDING EMPLOYEE'

Permission Set Groups
Permission Sets

Custom Code
Custom Permissions

Adding Employee

Current Assignments Add Assignment

8. Click on Add Assignment.

Select Users to Assign

All Users ▾					
1 item selected		<input type="text"/> Search this list... ✖ C ▼			
Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Chatter Expert	Chatter	chatty.00d5i00000ewzcbea5.165fc3eew2or@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> demo project	dproj	nadeem@smart.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input checked="" type="checkbox"/> Elijah Mikaelson	emika	elijah@smart.com	On Site Employee	<input checked="" type="checkbox"/>	On Site Employee
<input type="checkbox"/> Integration User	integ	integration@00d5i00000ewzcbea5.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Jason Mikaelson	jmika	jason@smart.com	Remote Employee	<input checked="" type="checkbox"/>	Remote Employee
<input type="checkbox"/> Kol Mikaelson	kmika	kol@smart.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> Niklaus Mikaelson	nmika	nikmik@smart.com	HR	<input checked="" type="checkbox"/>	HR

Cancel Next

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.

Milestone 16 : 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:

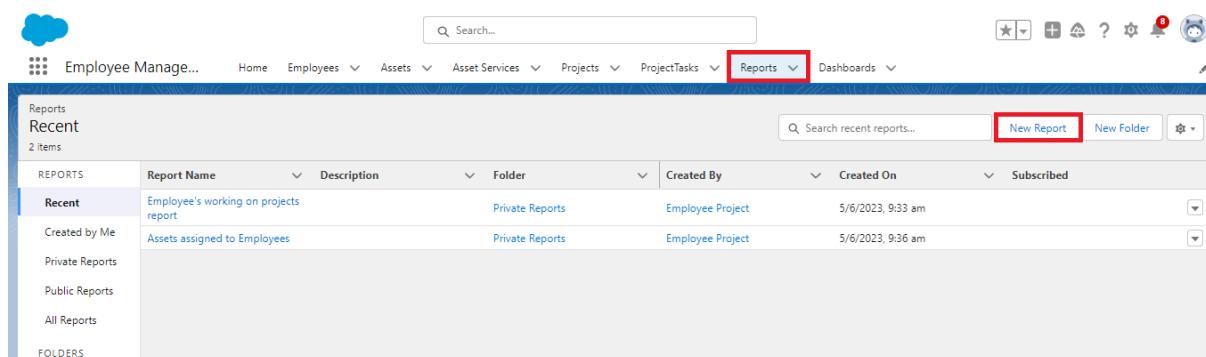
The CEO of an organization wants to have a brief data on employees working, projects in take, project progress, Assets assigned, what are the conditions of the Assets assigned. So he can have a clear picture of his organization and be able to make any decisions required based on this data. So he calls you on this task and wants you to represent the data in an appropriate way.

Let's create a Report.

Activity 1:

Create Report

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



The screenshot shows the Salesforce Reports interface. At the top, there is a navigation bar with various tabs like Home, Employees, Assets, Asset Services, Projects, ProjectTasks, Reports (which is currently selected and highlighted with a red box), and Dashboards. Below the navigation bar, there is a search bar labeled "Search..." and a "Reports" section titled "Recent". This section contains two items: "Employee's working on projects report" and "Assets assigned to Employees". To the right of the recent reports, there is a "New Report" button, which is also highlighted with a red box. On the left side of the main content area, there is a sidebar with categories: REPORTS (Recent, Created by Me, Private Reports, Public Reports, All Reports) and FOLDERS.

3. Select report type from category or from report type panel or from search panel → click on start report.

Create Report

Select a Report Type

Report Type Name	Category
Activities with Employees	Standard
Employees	Standard
Employees with Reports to	Standard
Employees with ProjectTasks and Projects	Standard
Employee History	Standard
Assets with Employee Name	Standard
Projects with ProjectTasks and Employees	Standard

Details

Employees Standard Report Type

Start Report

Created By You
No Reports Yet

Created By Others
No Reports Yet

Objects Used in Report Type

Owner

4. Customize your report

- Add fields from left pane as shown below

Employee Manage... Home Employees Assets Asset Services Projects ProjectTasks Reports Dashboards

REPORT New Employees Report Employees

Fields Outline Filters 1 Groups GROUP ROWS Add group... Q Preview a limited number of records. Run the report to see everything.

	Employee Name	Employee ID	Reports To	Login Time	Logout Time	Mode of Work	LinkedIn Profile
1	Employee	#005-00000-HYtC	-	-	-	-	Http://https://linkdin.in
2	Employee for Junction test	#005-00000-HyqVY	-	8:00 am	5:00 pm	-	Http://https://linkdin.in

Update Preview Automatically

Columns Add column... Q Employee Name X Employee ID X Reports to X Login Time X Logout Time X Mode of Work X LinkedIn Profile X

Save & Run Save Close Run

5. Save or run it.

Note: Reports may get varied from the above pictures as the data might be different.

Activity 2:

1. Create a report with report type: “Employees with ProjectTasks and Projects”.
2. Create a report with report type: “Employees with Assets”.

Milestone 17 : 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.

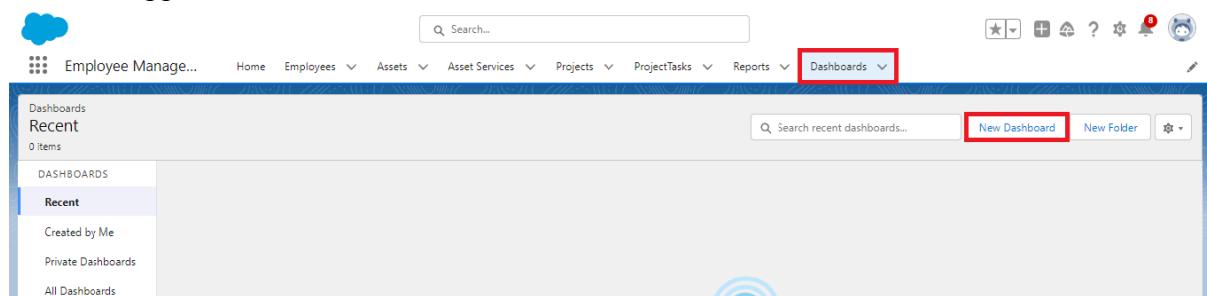
Use Case:

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.

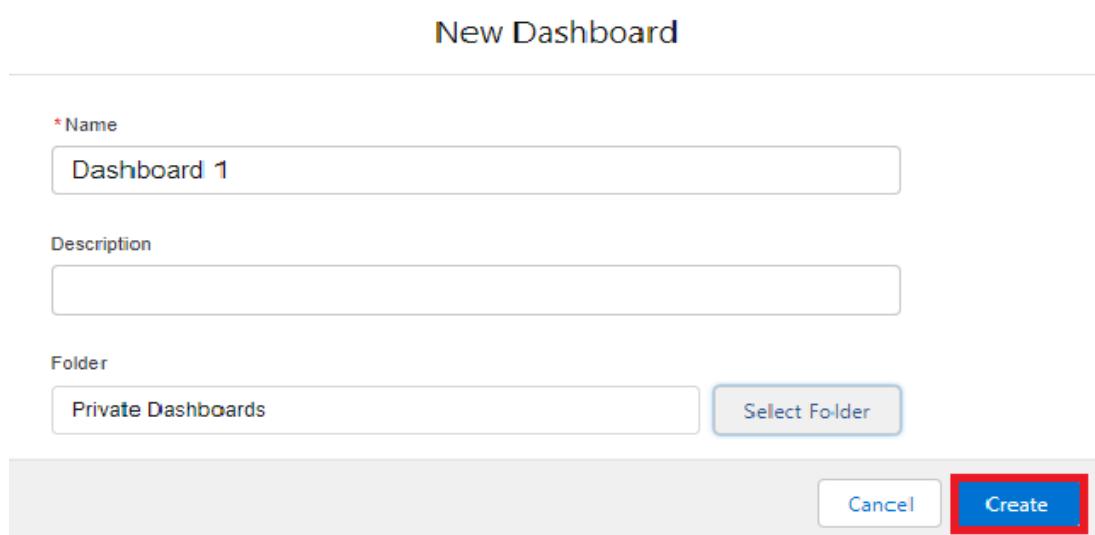
Activity 1:

Create Dashboard

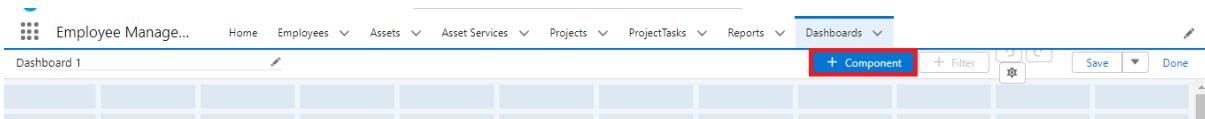
1. Go to the app → click on the Dashboards tabs.



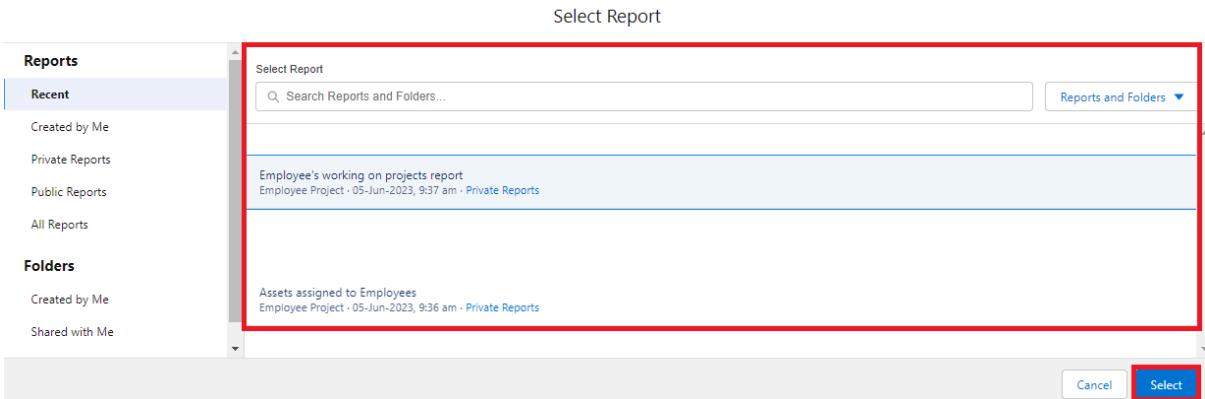
2. Give a Name and click on Create.


 A screenshot of the 'New Dashboard' creation dialog box. It has several input fields:
 - A required field labeled 'Name' with the value 'Dashboard 1'.
 - An optional field labeled 'Description' with a blank text area.
 - A 'Folder' section where 'Private Dashboards' is selected from a dropdown, with a 'Select Folder' button next to it.
 - At the bottom right, there are two buttons: 'Cancel' and 'Create', with 'Create' being 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.

Milestone 18 : 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.

Prerequisites:

Create the **leave** object with the following fields.

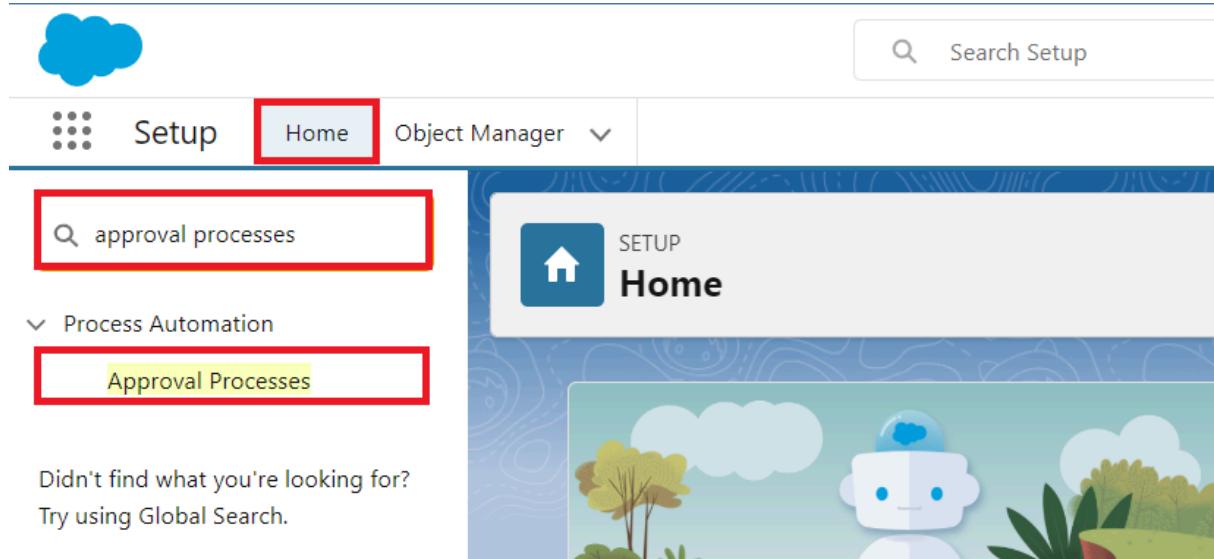
Object	Fields	Datatype
Leave	Employee Name No. of Days Subject Description Status	Lookup with Employee object Number Text Text Area(Rich) Picklist: values as follows <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> Submitted Approved Rejected </div> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> Note: Make sure the Status field is read only for everyone. (Give read only permission in step 3 while creating the field) </div>

Create the tab for the **leave** object.

Activity 1:

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.

A listing of both active and inactive approval processes for Leaves is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to configure all approval options. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

- Use Jump Start Wizard
- Use Standard Setup 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.

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

Activity 2:

Initial Submission Action:

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

Initial Submission Actions		Add Existing	Add New
Action	Type	Description	Email Alert Field Update Outbound Message
Record Lock		Lock the record	

- 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, and the new value.

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	<input type="checkbox"/> i

Specify New Field Value

Picklist Options

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

Activity 3:

Approval Steps:

- 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	<input type="text" value="Approval from HR"/>
Unique Name	<input type="text" value="Approval_from_HR"/> i
Description	<input type="text"/>

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

<input type="radio"/> All records should enter this step.																		
<input checked="" type="radio"/> Enter this step if the following criteria are met: 																		
<table border="1"> <thead> <tr> <th>Field</th> <th>Operator</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Leave: No. of Days</td> <td>equals</td> <td>5</td> </tr> <tr> <td>--None--</td> <td>--None--</td> <td></td> </tr> </tbody> </table> AND	Field	Operator	Value	Leave: No. of Days	equals	5	--None--	--None--										
Field	Operator	Value																
Leave: No. of Days	equals	5																
--None--	--None--																	
--None--	--None--																	
--None--	--None--																	
--None--	--None--																	
AND																		
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

<input type="radio"/> Let the submitter choose the approver manually.
<input type="radio"/> Automatically assign to queue.
<input checked="" type="radio"/> Automatically assign to approver(s).
User Niklaus Mikaelson i
Add Row Remove Row
When multiple approvers are selected:
<input checked="" type="radio"/> Approve or reject based on the FIRST response.
<input type="radio"/> Require UNANIMOUS approval from all selected approvers.
<input type="checkbox"/> The approver's delegate may also approve this request. i

Reject Behavior

What should happen if the approver rejects this request?

<input checked="" type="radio"/> Perform all rejection actions for this step AND all final rejection actions. (Final Rejection)
<input type="radio"/> Perform ONLY the rejection actions for this step and send the approval request back to the most recent approver. (Go Back 1 Step)

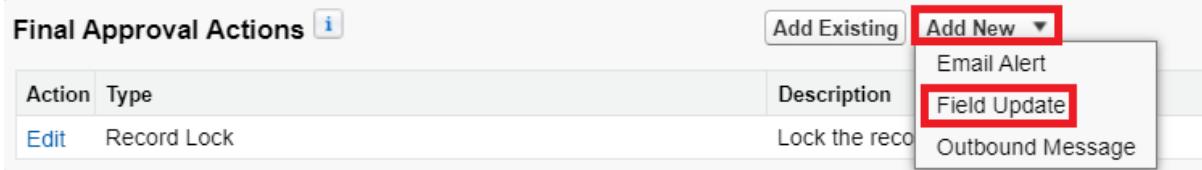
[Previous](#) Save [Cancel](#)

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 4:

Final Approval Action:

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



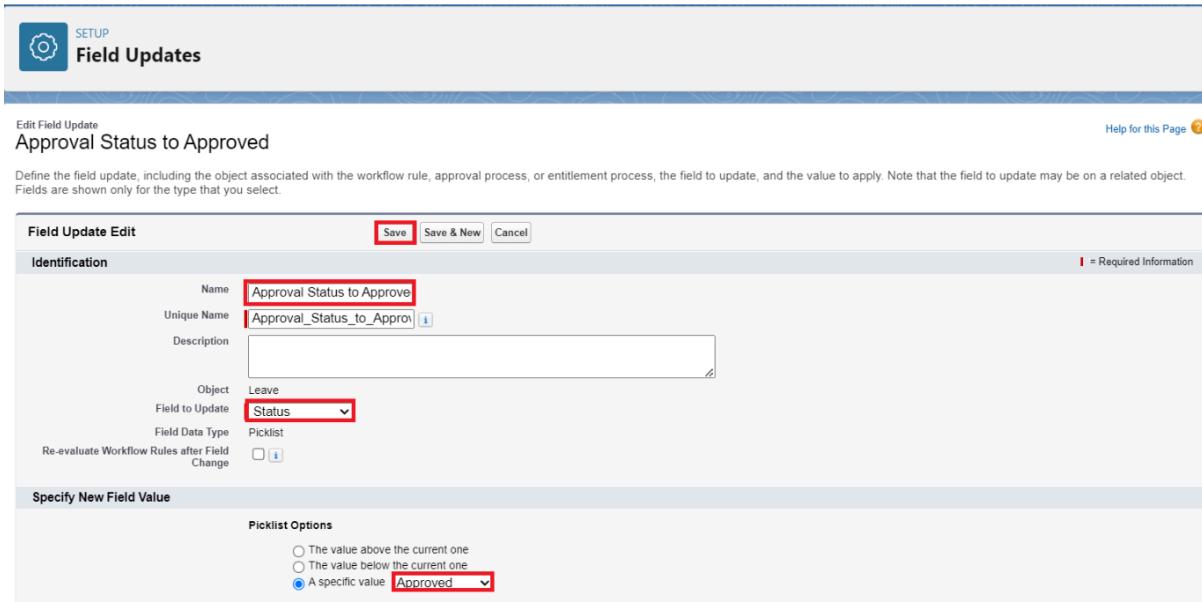
Final Approval Actions

Action	Type	Description
Edit	Record Lock	Lock the record

Add Existing Add New ▾

- Email Alert
- Field Update**
- Outbound Message

- 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.



Field Updates

Edit Field Update Help for this Page

Approval Status to Approved

Name: Approval Status to Approve
Unique Name: Approval_Status_to_Appro

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: **Approved**

Activity 5:

Final Rejection Action:

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



Final Rejection Actions

Action	Type	Description
Edit	Record Lock	Unlock the record

Add Existing Add New ▾

- Email Alert
- Field Update**
- Outbound Message

- 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.

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

Field Update Edit Save Save & New Cancel

Identification

Name	Approval Status to Rejected
Unique Name	Approval_Status_to_Reject i
Description	<input type="text"/>
Object	Leave
Field to Update	Status ▼
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/> i

Specify New Field Value

Picklist Options

The value above the current one
 The value below the current one
 A specific value Rejected [▼](#)

Save Save & New Cancel

Milestone 19 : Apex Trigger

Use Case:

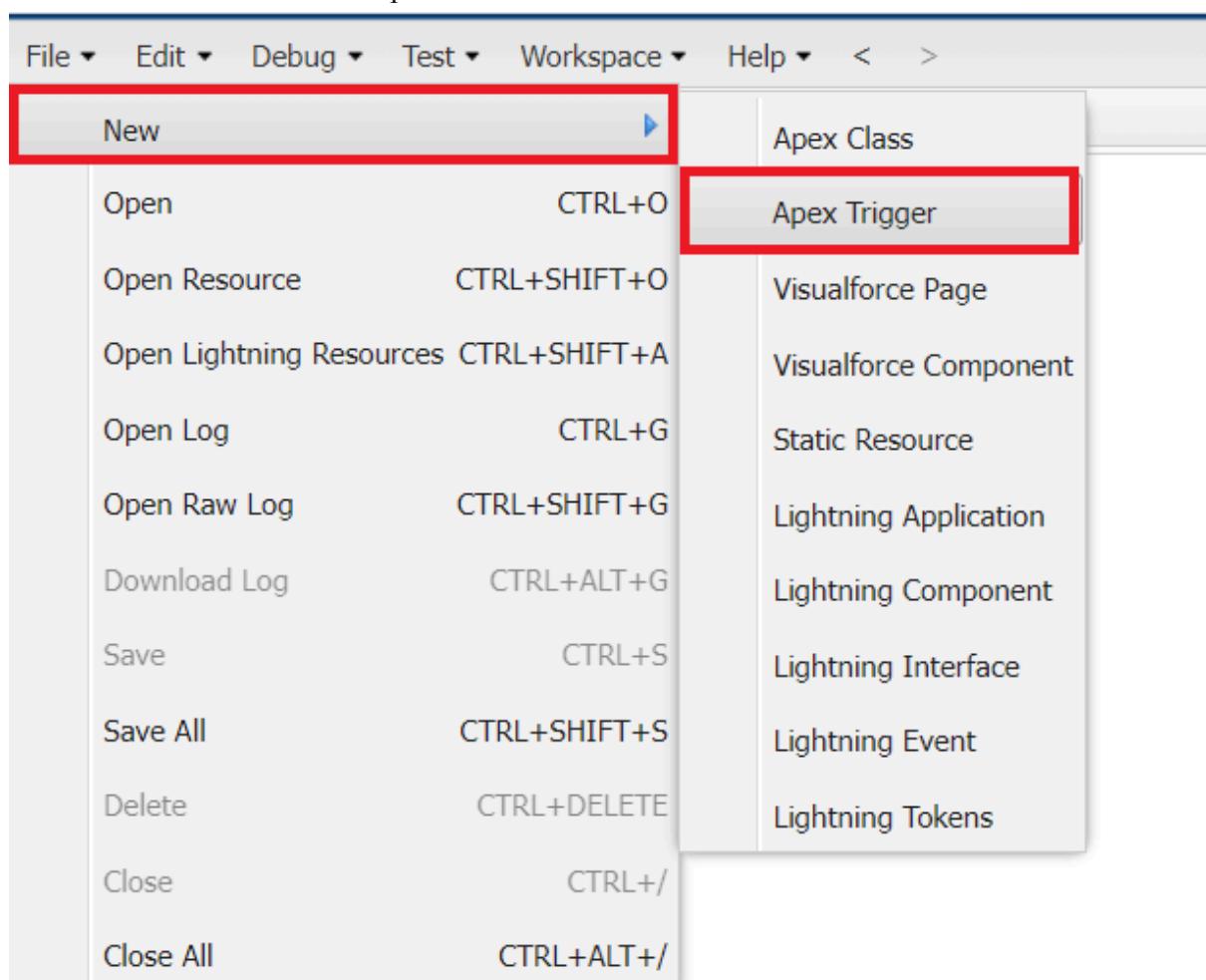
The Manager at TheSmartBridge wants no duplicate names of employees should enter into the database. So he/she recalls you for the solution.

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

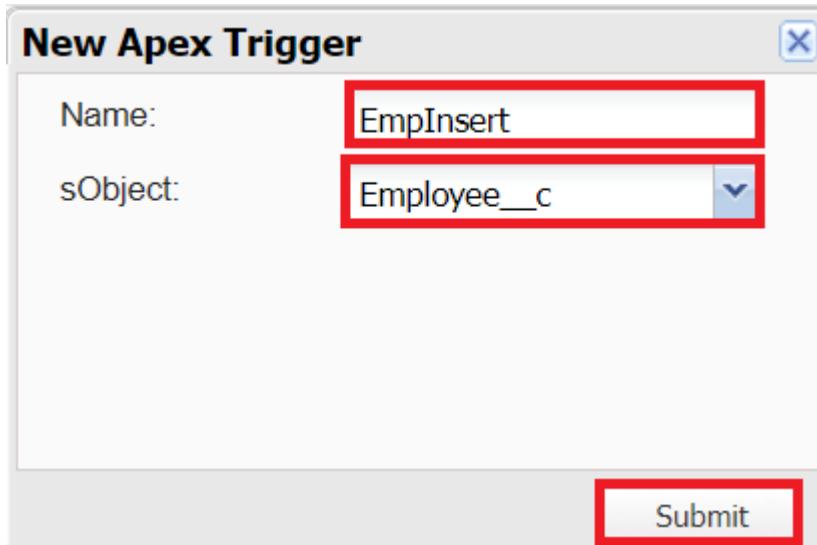
Activity 1 : Create an Apex Trigger

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

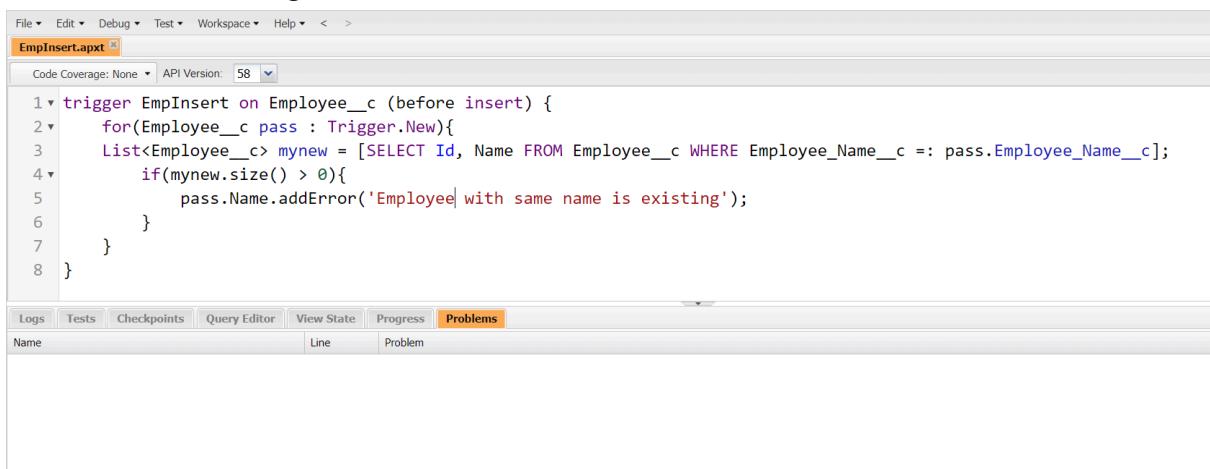
Click on the file → New → Apex Class.



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');
        }
    }
}
  
```

5. Save the code.(click on file → Save)

Trigger Code:

```

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');
        }
    }
}
  
```

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	In Time
	Out Time
LinkedIn Profile	Put Time
Leave Days	

We hit a snag.

Review the errors on this page.

- Employee with same name is existing

Review the following fields

- [Employee ID](#)

 Cancel Save & New Save