

Workforce Administration

Management

Mentor:L.Laxmi Narayana

Team id:LTVIP2025TMID19444

Sri Vasavi Degree & Pg College



Team leader : Mailavarapu.Sai venkata manikanta
Email : msaimanikanta1437@gmail.com



Team Member : Bommidi.Subrahmanyam
Email : subrahmanyam.bommidi39@gmail.com



Team Member :Tannidi.Venkatsai

Email :venkatsaitannidi2003@gmail.com



Team Member : Robbi. Pavan Durga sairam
Email : p22609420@gmail.com



Team Member : Immani. Leela Sai
Email : Immanileelasai@gmail.com

Project Overview :

Introduction to Salesforce: Overview of Salesforce and its key components -Understanding Salesforce editions and clouds- Exploring the Salesforce platform and its core services.

Objectives :

- Configure Salesforce objects, fields, and relationships to support business processes.
- Implement Organization-Wide Defaults (OWD) and Role-Based Access Control to ensure data security.
- Design and deploy page layouts, record types, and permission sets to enhance user experience.
- Develop reports and dashboards to provide real-time insights and support data-driven decision-making.
- Implement Chatter Groups for enhanced collaboration and communication.
- Conduct user training and adoption programs to ensure seamless transition to the new system.

Salesforce key features and concepts utilized :

- ❖ Creating a developer org.
- ❖ Creating custom objects.
- ❖ Tabs.
- ❖ Lighting app(Workforce administration solution).
- ❖ Fields and relationships.
- ❖ Owd settings.
- ❖ User adoption.
- ❖ Import data.
- ❖ Profiles.
- ❖ Roles.
- ❖ Users.
- ❖ Page layouts.
- ❖ Chatters group.
- ❖ Record types.
- ❖ Permission sets.
- ❖ Reports and Dashboards.

Detailed steps to solution design :

- Creating custom objects.

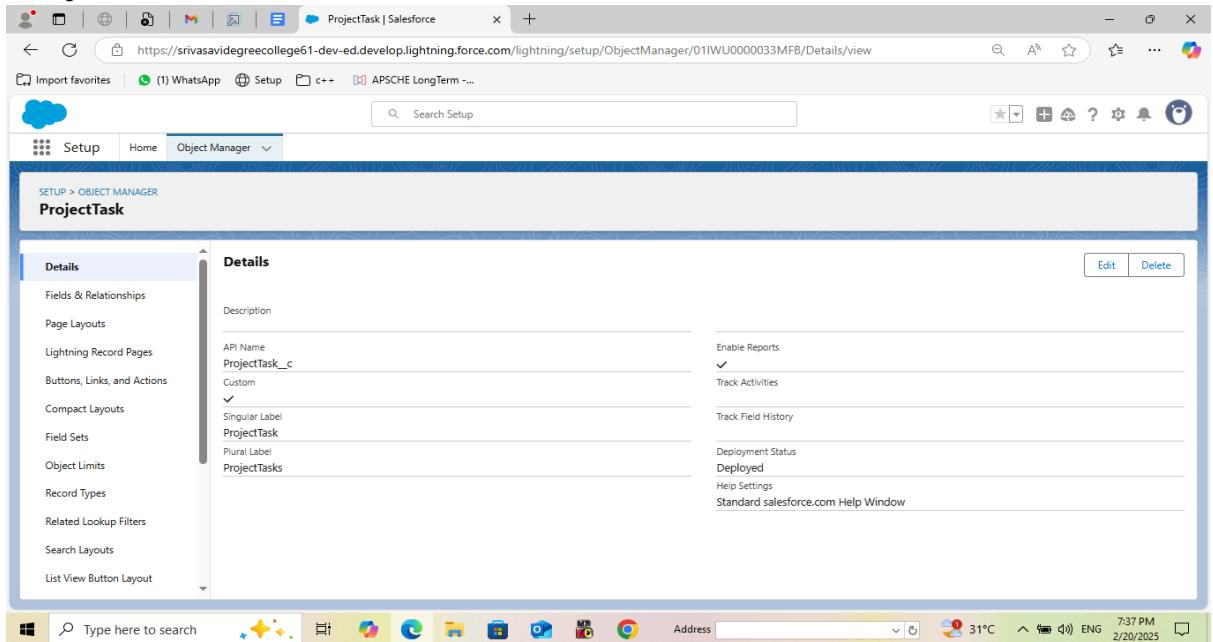
Asset Services

The screenshot shows the Salesforce Setup interface for creating a new object named 'Asset Service'. The left sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Record Types. The main 'Details' section shows the API Name as 'Asset_Service__c', a Custom object type. Singular and Plural labels are set to 'Asset Service' and 'Asset Services' respectively. Deployment status is marked as 'Deployed'. The browser address bar shows the URL for the Object Manager setup page.

Asset

The screenshot shows the Salesforce Setup interface for creating a new object named 'Asset'. The configuration is identical to the 'Asset Service' object, with the API Name as 'Asset__c', a Custom object type, and labels set to 'Asset' and 'Assets'. The browser address bar shows the URL for the Object Manager setup page.

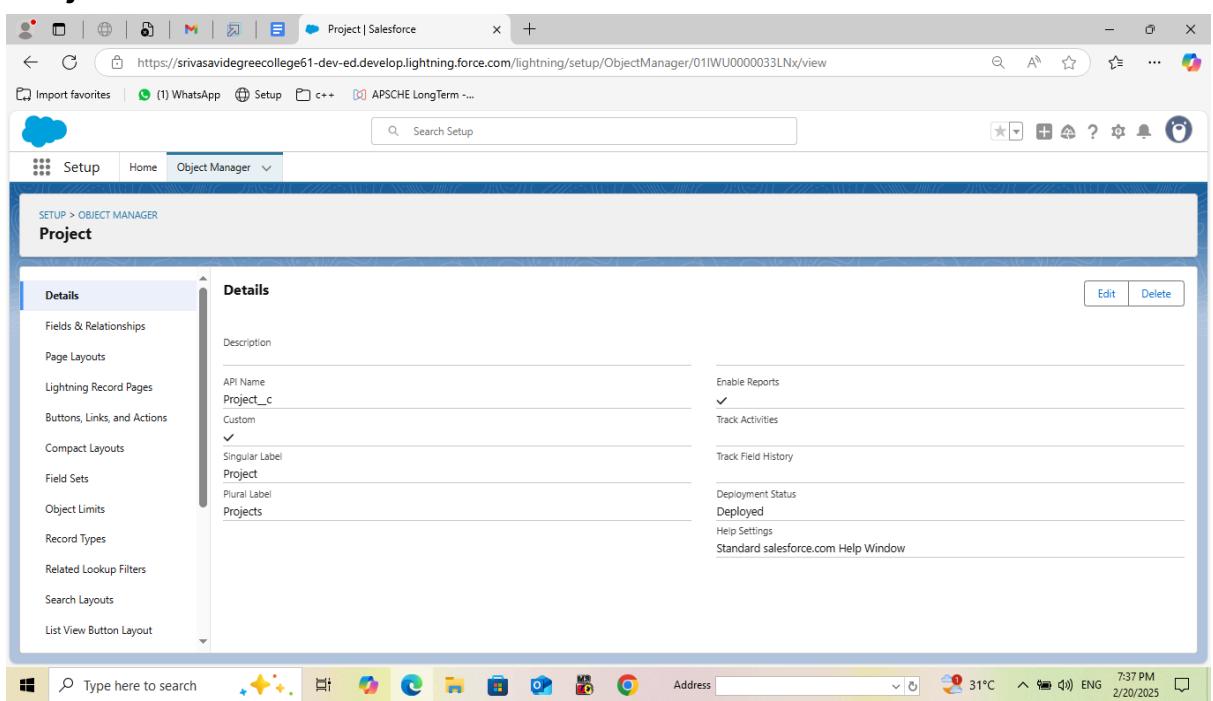
ProjectTask



The screenshot shows the Salesforce Object Manager interface for the 'ProjectTask' object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main 'Details' pane shows the following fields:

Field	Value
Description	
API Name	ProjectTask__c
Custom	✓
Singular Label	ProjectTask
Plural Label	ProjectTasks
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Project



The screenshot shows the Salesforce Object Manager interface for the 'Project' object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main 'Details' pane shows the following fields:

Field	Value
Description	
API Name	Project__c
Custom	✓
Singular Label	Project
Plural Label	Projects
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Employee

The screenshot shows the Salesforce Object Manager interface for the 'Employee' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays the 'Fields & Relationships' section, which lists 26 items sorted by field label. The fields shown include Employee ID (Auto Number), Employee Name (Text(18)), Experience (Text Area(255)), Food Allowance Amount (Currency(18, 0)), Food Allowances (Checkbox), Gender (Picklist), Joining date (Date), and Last Modified By (Lookup(User)).

➤ Tabs.

The screenshot shows the Salesforce Tabs setup interface. The left sidebar includes links for Setup Home, Service Setup Assistant, and various administration sections. The main area is titled 'Custom Tabs' and contains instructions for creating new custom tabs. It shows three categories: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. Under 'Custom Object Tabs', there is a table listing five tabs: Assets, Asset Services, Employees, Projects, and ProjectTasks. Each tab has an 'Edit | Del' button and a 'Tab Style' icon. The 'Employees' tab is highlighted with a yellow background.

- ❖ Assets
- ❖ Asset Services
- ❖ Employees
- ❖ Projects
- ❖ ProjectTask

➤ Lighting app(Workforce administration solution).

The screenshots illustrate the configuration of a Lightning app named "Workforce Administration Solution".

- App Details & Branding:** Shows the app's name, developer name, description, and branding options. The primary color is set to #0070D2.
- Navigation Items:** Displays a list of available items like Accounts, All Sites, and App Launcher, which are then selected for the navigation bar.
- User Profiles:** Shows the selection of user profiles that can access the app, including System Administrator.

➤ Fields and relationships.

ProjectTask

The screenshot shows the Salesforce Object Manager interface for the 'ProjectTask' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays the 'Fields & Relationships' section, which contains 7 items sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee Name	Employee_Name_c	Master-Detail(Employee)		✓
Finishes in	Finishes_in__c	Formula (Number)		
Last Modified By	LastModifiedById	Lookup(User)		
Project Task	Project_Task__c	Master-Detail(Project)		✓
Project Task Name	Name	Text(80)		✓
Working Hours	Working_Hours__c	Number(18, 0)		

Project

The screenshot shows the Salesforce Object Manager interface for the 'Project' object. The left sidebar lists various setup options. The main content area displays the 'Fields & Relationships' section, which contains 9 items sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Project ID	Name	Auto Number		✓
Project Lead	Project_Lead__c	Text(18)		
Project Name	Project_Name__c	Text(18)		
Project Status	Project_Status__c	Picklist		
Start Date	Start_Date__c	Date		

Asset Service

The screenshot shows the Salesforce Object Manager interface for the Asset Service object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' and displays 9 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Id	Asset_Id_c	Lookup(Asset)		✓
Created By	CreatedById	Lookup(User)		
Description	Description_c	Long Text Area(32768)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Project Task Name	Name	Text(80)		✓
Subject	Subject_c	Text Area(255)		
Technician	Technician_c	Text(18)		

Asset

The screenshot shows the Salesforce Object Manager interface for the Asset object. The left sidebar lists various setup options. The main content area is titled 'Fields & Relationships' and displays 8 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

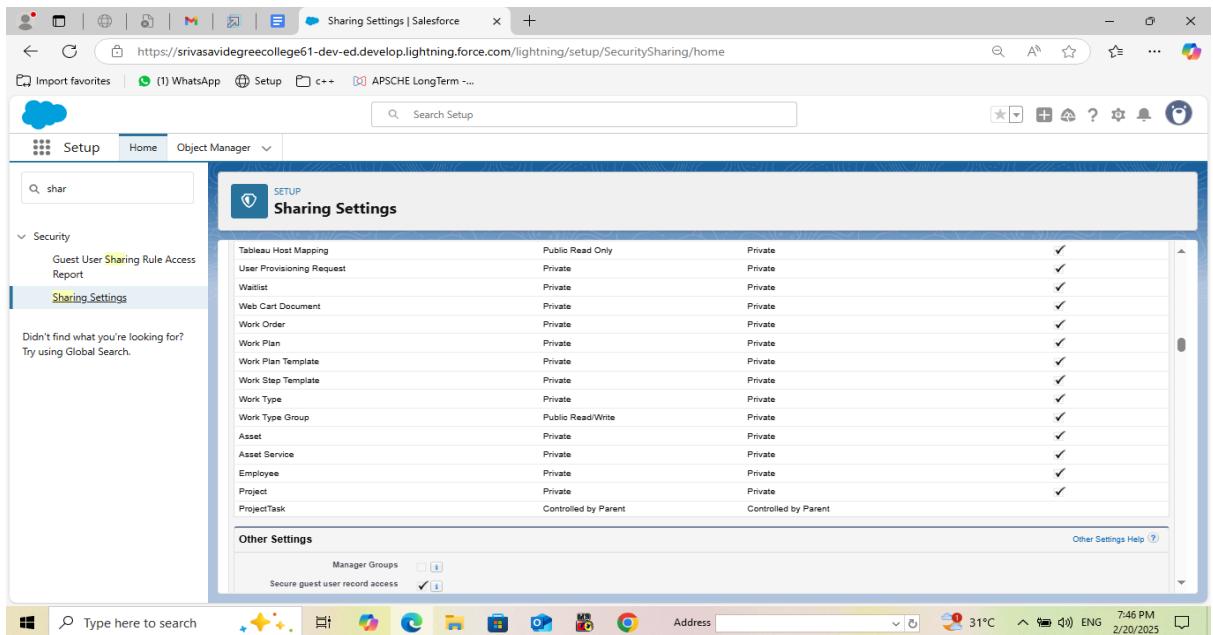
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Asset Type	Asset_Type_c	Picklist		
Created By	CreatedById	Lookup(User)		
Date Of Issue	Date_Of_Issue_c	Formula (Date)		
Employee Name	Employee_Name_c	Lookup(Employee)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Model Name	Model_Name_c	Text(18)		
Owner	OwnerId	Lookup(User,Group)		✓
Project Task Name	Name	Text(80)		✓

Employee

The screenshot shows the Salesforce Object Manager interface for the Employee object. The left sidebar lists various setup options. The main content area is titled 'Fields & Relationships' and displays 26 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Logout Time	Logout_Time_c	Time		
Mode of Work	Mode_of_Work_c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Phone no	Phone_no_c	Phone		
Qualification	Qualification_c	Text(18)		
Record Type	RecordTypeId	Record Type		✓
Reports to	Reports_to_c	Lookup(Employee)		✓
Wifi Allowance Amount	Wifi_Allowance_Amount_c	Currency(18, 0)		
Wifi Allowances	Wifi_Allowances_c	Checkbox		

➤ Owd settings

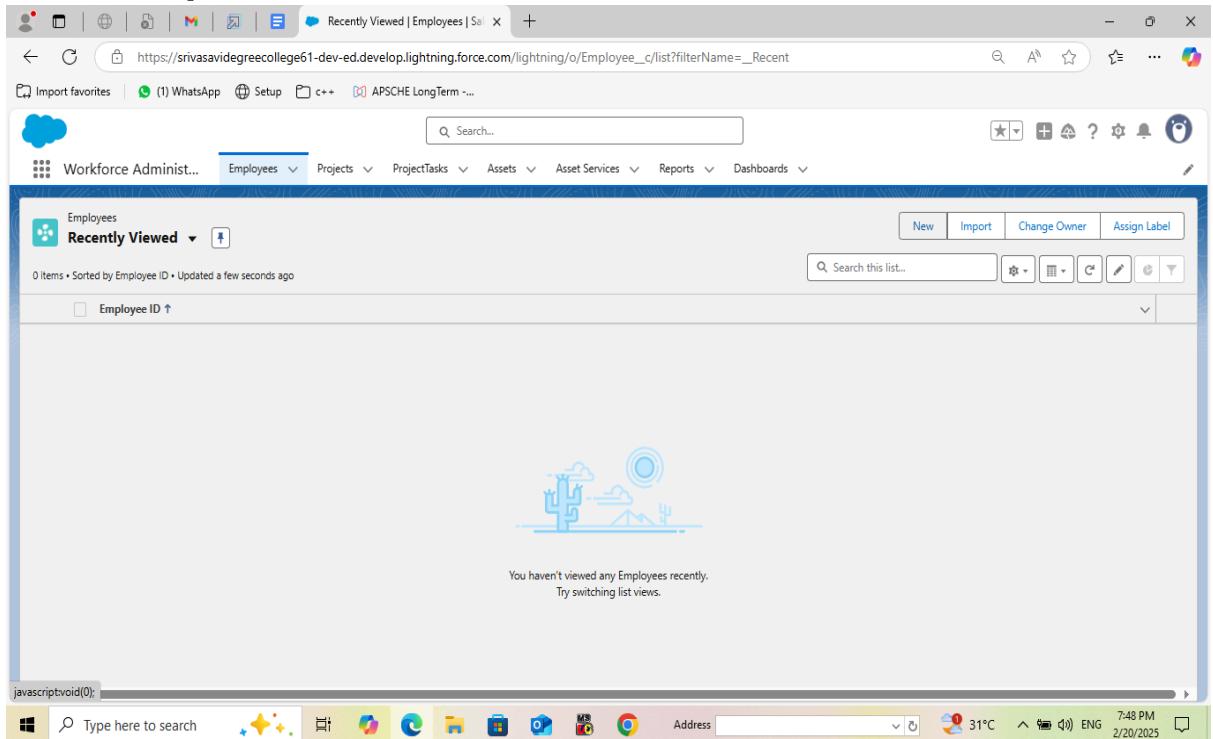


The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar and sections for Security, Guest User Sharing Rule Access Report, and Sharing Settings. The main area is titled "Sharing Settings" and lists various objects with their sharing permissions:

Object	Sharing Rule	Access Level	Controlled By
Tableau Host Mapping		Public Read Only	Private
User Provisioning Request		Private	Private
Waitlist		Private	Private
Web Cart Document		Private	Private
Work Order		Private	Private
Work Plan		Private	Private
Work Plan Template		Private	Private
Work Step Template		Private	Private
Work Type		Private	Private
Work Type Group		Public Read/Write	Private
Asset		Private	Private
Asset Service		Private	Private
Employee		Private	Private
Project		Private	Private
ProjectTask		Controlled by Parent	Controlled by Parent

Below the table, there is a section for "Other Settings" with checkboxes for "Manager Groups" and "Secure guest user record access".

➤ User adoption.



The screenshot shows the Salesforce Employees Recently Viewed page. The top navigation bar includes links for Workforce Administration, Employees, Projects, ProjectTasks, Assets, Asset Services, Reports, and Dashboards. The main content area displays a list of recently viewed employees with columns for Employee ID, Name, and Last Activity. A message at the bottom states: "You haven't viewed any Employees recently. Try switching list views." The page also features a decorative illustration of a desert landscape with cacti and a sun.

➤ Import data.

Import your data in 3 easy steps!

Launch the Data Import Wizard to import your data.

Pre-step: Prepare your data for import Choose data to import Edit field mapping Review and start import

Launch Wizard!

FAQ

- How do I prepare my data for import?
- How many records can I import?
- What kind of objects can I import?
- Can I do simultaneous imports?

Data Import video series

Additional Resources

- Find import templates and other helpful tools
- Learn how to use the Data Import Wizard

Choose data

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

- Asset Services
- Assets
- Employees
- ProjectTasks
- Projects

Edit mapping

Add new records

Match by: None

Which User field in your file designates record owners? None

Which Employee field in your file do you want to match against to set the Reports to lookup field? None

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

Record type:

Where is your data located?

Drag CSV file here to upload

Start import

Cancel Previous Next

Bulk Data Load Jobs

Bulk Data Load Job 750WU00000Fa4Sf

View the details of a bulk data load job.

[Back to List - Bulk Data Load Jobs](#)

Bulk Data Load Job Detail		Job ID: 750WU00000Fa4Sf		Submitted By: Srivastava		Job Type: Bulk V1		Operation: Insert		Status: Closed		
Start Time:	18/02/2025, 6:44 pm IST	End Time:	18/02/2025, 6:44 pm IST	Queued Batches:	0	In Progress Batches:	0	Completed Batches:	1	Failed Batches:	0	Total Processing Time (ms): 186
Time to Complete (min:secs):	00:01	Owner:	Employee	Progress:	100%	Records Processed:	14	Records Failed:	0	API Active Processing Time (ms): 90	API Processing Time (ms): 0	
External File:	Employee.csv	Content Type:	CSV	Records Retried:	0	Retries:	0					
Concurrency Mode:	Parallel	API Version:	63.0									

Batches

View Request	View Result	Status ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Ajax Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751WU00000A7BwO	18/02/2025, 6:44 pm	18/02/2025, 6:44 pm	100	90	0	14	0	0	Completed	

➤ Page layouts.

The screenshot shows the Salesforce Setup interface for creating a new page layout. The URL is <https://srivasavidegreecollege61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IWU000003KwX/PageLayouts/new>. The page title is "Employee | Salesforce".

The left sidebar shows the "Page Layouts" section selected under "Employee". The main area is titled "Create New Page Layout". A note says: "As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users." The "Existing Page Layout" dropdown is set to "Employee Layout" and the "Page Layout Name" field contains "Remote Employee Layout".

Second Screenshot:

The screenshot shows the configuration of a page layout for the Employee object. The URL is <https://srivasavidegreecollege61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IWU000003KwX/PageLayouts/00hWU00000C...>. The page title is "Employee | Salesforce".

The left sidebar shows the "Page Layouts" section selected under "Employee". The main area displays the "Layout Properties" for the "Employee Layout". The "Fields" section lists fields like Cab Allowance, Email, Food Allowance Amount, Last Modified By, Mode of Work, Reports to, Cab Allowance Amount, Employee ID, Food Allowances, LinkedIn Profile, Owner, WiFi Allowance Amount, Address, Created By, Employee Name, Gender, Login Time, Phone no, WiFi Allowances, Age, Date of Birth, Experience, Joining date, Logout Time, and Qualification. Below the fields, there are sections for "Personal Information" (Date of Birth: 19/02/2025, Address: Sample Text, Age: 481.75) and "Allowances" (Cab Allowance: ✓, Food Allowances: ✓, Cab Allowance Amount: ₹123.45, Food Allowance Amount: ₹123.45).

➤ Chatters group.

The screenshot shows the Salesforce Lightning interface with the URL https://srivasavidegreecollege61-dev-ed.lightning.force.com/lightning/o/CollaborationGroup/list?filterName=__Recent. The page displays a list of recently viewed Chatter groups. The first item is 'Internal Discussion (Private)', which was last active on 19/02/2025 at 12:58 pm, has 5 members, and is owned by Bhagya Lakshmi. The interface includes standard Salesforce navigation bars and a search bar.

➤ Record types.

The screenshot shows the Salesforce Setup interface with the URL <https://srivasavidegreecollege61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IWU0000033KwX/RecordTypes/view>. The page displays the 'Record Types' section for the 'Employee' object. It lists two record types: 'On Site Employee' and 'Remote Employee', both of which are active and were modified by Bhagya Lakshmi on 19/02/2025. The left sidebar shows other configuration options like Details, Fields & Relationships, and Page Layouts.

- ❖ On site Employee
- ❖ Remote Employee

➤ Permission sets.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar has 'Permission Sets' selected under 'Users'. The main area displays a table of permission sets with columns for Action, Permission Set Name, Description, and License. One row is highlighted in blue.

Action	Permission Set Name	Description	License
Clone	Partner Connect Partner Admin Setup	Set up Partner Connect from a partner org. Partner Connect is a ...	Salesforce
Clone	Payments Administrator	Has all the user permissions to gate access to APIs that are avail...	Salesforce Payments Internal
Del Clone	Per to Eng	Access the Core Adoption Service and tenant orgs, which are used ...	Cloud Integration User
Clone	Published Suggested for You Nudges: Integration User		

➤ Reports

The screenshot shows the Salesforce Reports page. The left sidebar lists categories like 'Recent', 'Created by Me', 'Private Reports', etc. The main area displays a table of recent reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. One report is highlighted in blue.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Assets with Employee Name Report		Private Reports	Bhagya Lakshmi	19/2/2025, 3:19 pm	
Created by Me	new Employees report		Private Reports	Bhagya Lakshmi	19/2/2025, 2:54 pm	
Private Reports	Employee with project tasks and project		Private Reports	Bhagya Lakshmi	19/2/2025, 3:10 pm	

➤ Dashboards.

Dashboard 1 | Salesforce

Import favorites | (1) WhatsApp | Setup | c++ | APSCHE LongTerm ...

Workforce Administ... Employees Projects ProjectTasks Assets Asset Services Reports Dashboards

Dashboard 1

As of 19-Feb-2025, 3:23 pm Viewing as Bhagya Lakshmi

Employee with project tasks and project

We can't draw this chart because there is no data.

[View Report \(Employee with project tasks and project\)](#)

Address: https://srivasavidegreecollege61-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZWU000002XYoO2AW/view?queryScope=userFolders

Dashboard 2 | Salesforce

Import favorites | (1) WhatsApp | Setup | c++ | APSCHE LongTerm ...

Workforce Administ... Employees Projects ProjectTasks Assets Asset Services Reports Dashboards

Dashboard 2

As of 19-Feb-2025, 3:22 pm Viewing as Bhagya Lakshmi

Assets with Employee Name Report

We can't draw this chart because there is no data.

[View Report \(Assets with Employee Name Report\)](#)

Address: https://srivasavidegreecollege61-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZWU000002XaA12AK/view?queryScope=userFolders

Recent | Dashboards | Salesforce

Import favorites | (1) WhatsApp | Setup | c++ | APSCHE LongTerm ...

Workforce Administ... Employees Projects ProjectTasks Assets Asset Services Reports Dashboards

Dashboards

Recent

2 items

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Dashboard 2		Private Dashboards	Bhagya Lakshmi	19/2/2025, 3:21 pm	
Dashboard 1		Private Dashboards	Bhagya Lakshmi	19/2/2025, 3:18 pm	

DASHBOARDS

Recent

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Address: https://srivasavidegreecollege61-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

➤ Roles.

The screenshot shows the Salesforce Setup interface with the search bar at the top containing "Search Setup". A dropdown menu is open, showing "Manager" and other options like "Object Manager", "Customize", "Data", "Security", "Integrations", "Reporting", "Dashboards", "Mobile", "Email", "Setup", and "Help". The main content area is titled "Your Organization's Role Hierarchy". It displays a hierarchical tree of roles under "srivasavi degree college". The hierarchy includes:

- srivasavi degree college**
 - Add Role**
 - CEO** Edit | Del | Assign
 - Add Role**
 - CFO** Edit | Del | Assign
 - Add Role**
 - COO** Edit | Del | Assign
 - Add Role**
 - HR** Edit | Del | Assign
 - Add Role**
 - Manager** Edit | Del | Assign
 - Add Role**
 - On Site Employee** Edit | Del | Assign
 - Add Role**
 - Remote Employee** Edit | Del | Assign
 - Add Role**
 - SVP Customer Service & Support** Edit | Del | Assign
 - Add Role**

➤ Profiles.

Manager

The screenshot shows the Salesforce Setup interface with the search bar at the top containing "Search Setup". A dropdown menu is open, showing "Manager" and other options like "Object Manager", "Customize", "Data", "Security", "Integrations", "Reporting", "Dashboards", "Mobile", "Email", "Setup", and "Help". The main content area is titled "Profiles". It displays a list of profiles with the following data:

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Edit Del ... Manager	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Clone Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>

At the bottom, there are navigation links for "1-4 of 4" and "0 Selected", and a page footer showing "Page 1 of 1". The system status bar at the bottom right indicates "31°C", "ENG", "6:51 PM", and the date "2/21/2025".

Employee

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar has 'Profiles' selected. The main area displays a table of profiles. One row is highlighted for 'On Site Employee'. The table includes columns for Action, Profile Name, User License, and Custom. A global search bar at the top right says 'Search Setup'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	On Site Employee	Analytics Cloud Integration User	<input checked="" type="checkbox"/>

HR

The screenshot shows the Salesforce Setup interface under the Profiles section. The left sidebar has 'Profiles' selected. The main area displays a table of profiles. One row is highlighted for 'HR'. The table includes columns for Action, Profile Name, User License, and Custom. A global search bar at the top right says 'Search Setup'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	High Volume Customer Portal	High Volume Customer Portal	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	High Volume Customer Portal User	High Volume Customer Portal	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	HR	Salesforce	<input checked="" type="checkbox"/>

➤ Users

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

- Page Header:** IBM Open e-Learning Ecosystem
- Search Bar:** Search Setup
- Left Sidebar:** A navigation tree under the **Users** category, including sections like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospectors.
- Main Content Area:** The **Users** page titled "All Users". It displays a table of users with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists the following users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty@00dwu00000vlf2a5.urovurz2ebok@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Lakshmi, Bhavya	Blake	bhayyalakshmi@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Mikaelson, Kol	kmika	kasaniujushavathi1123937@gmail.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Mikaelson, Niklaus	nmika	kasaniujushavathi1123937@gmail.com	HR	<input checked="" type="checkbox"/>	HR
<input type="checkbox"/>	Pushpa, Kasani	soufsha	kasaniujushavathi12345937@gmail.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Ramu, Mata	mranojia	kasaniujushavathi17880937@gmail.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	User_Interaction	integ	integration@00dwu00000vlf2a5.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	integr@issecurity@00dwu00000vlf2a5.com		<input checked="" type="checkbox"/>	On Site Employee

Bottom Navigation: New User, Reset Password(s), Add Multiple Users, and links to other setup categories.

Testing and Validation :

Employee Object

Field name : Age

Data type : Formula

Formula: YEAR(Today ()) - YEAR (Date_of_Birth__c)

The screenshot shows the Salesforce Setup interface for the Employee object. On the left, a sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main area is titled 'Formula Options' for the 'Age' field. The formula is set to 'Number' with '2' decimal places. The formula itself is 'YEAR(TODAY()) - YEAR(Date_of_Birth__c)'. A dropdown menu on the right lists various mathematical functions such as ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. The system status bar at the bottom indicates it's 11:24 AM on 2/21/2025.

ProjectTask Object

Field name : Finishes in

Data type : Formula

Formula: (Project_Task__r.Start_Date__c - Project_Task__r.End_Date__c)

The screenshot shows the Salesforce Setup interface for the ProjectTask object. The sidebar includes options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main area displays the 'Custom Field Definition Detail' for the 'Finishes in' field. The formula is defined as '(Project_Task__r.Start_Date__c - Project_Task__r.End_Date__c)'. The system status bar at the bottom indicates it's 10:44 AM on 2/22/2025.

Asset

Field name : Date of issue

Data type : Formula

Formula: LastModifiedDate - 7

The screenshot shows the Salesforce Setup interface for creating a custom field. The page title is "Asset | Salesforce". The URL in the address bar is <https://srivasavidegcollege61-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IWU0000033MLd/FieldsAndRelationships/00N...>. The main content area displays the "Custom Field Definition Detail" for the "Date Of Issue" field. The field information includes:

- Field Label: Date Of Issue
- Field Name: Date_of_Issue
- API Name: Date_of_Issue_c
- Description: (empty)
- Help Text: (empty)
- Data Owner: (empty)
- Field Usage: (empty)
- Data Sensitivity Level: (empty)
- Compliance Categorization: (empty)
- Created By: Bhagya Lakshmi; 18/02/2025, 2:15 pm
- Modified By: Bhagya Lakshmi; 18/02/2025, 2:15 pm

The "Formula Options" section shows:

- Data Type: Formula
- Formula: LastModifiedDate - 7

The left sidebar shows the navigation path: SETUP > OBJECT MANAGER > Asset. The "Fields & Relationships" tab is selected. Other tabs include Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout.

Key scenarios addressed by salesforce in the Implementation project :

- Lead Management: Automate lead assignment, scoring, and routing to ensure timely follow-up.
- Opportunity Management: Streamline opportunity tracking, forecasting, and pipeline management.
- Account Management: Enhance account planning, relationship building, and customer engagement.

Marketing Scenarios

- Campaign Management: Plan, execute, and track marketing campaigns across multiple channels.
- Lead Generation: Automate lead generation, qualification, and nurturing.
- Customer Engagement: Personalize customer interactions and measure engagement metrics.

Service Scenarios

- Case Management: Automate case assignment, routing, and resolution.
- Customer Support: Provide omnichannel support, including phone, email, chat, and social media.
- Field Service Management*

: Optimize field service operations, including scheduling, routing, and inventory management.

Commerce Scenarios

- Order Management: Automate order processing, fulfillment, and shipping.
- Customer Experience: Provide personalized, seamless experiences across online and offline channels.

Analytics Scenarios

- Data Integration: Integrate data from multiple sources, including CRM, ERP, and external data sources.
- Data Visualization: Create interactive dashboards and reports to visualize key performance indicators (KPIs).
- Predictive Analytics: Use machine learning and predictive analytics to forecast sales, customer churn, and other business outcomes.

Conclusion :

In my point of view, the implementation of Salesforce is a complex process

that requires careful planning, execution, and testing. Throughout this project, we have outlined the key steps involved in implementing Salesforce, including requirements gathering, solution design, testing and validation, and deployment.

We have also identified key scenarios addressed by Salesforce in the implementation process, including sales, marketing, service, commerce, analytics, and integration scenarios.

By following the steps outlined in this project and addressing the key scenarios, organizations can ensure a successful Salesforce implementation that meets their business needs and drives user adoption.