

# KALLAM HARANADHAREDDY INSTITUTE OF TECHNOLOGY



Domain: Salesforce Developer

Branch: Information Technology

Batch:8

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**Project Title: Streamlined Employee Detail Management**

# **STREAMLINED EMPLOYEE DETAIL MANAGEMENT**

## **1. Project Overview**

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

## **2. Objectives**

### **Business Goals:**

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

### **Specific Outcomes:**

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

### **3. Salesforce Key Features and Concepts Utilized**

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

### **4. Detailed Steps to Solution**

#### **Design**

##### **Object Creation**

To create an object:

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

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

6. Allow search >>> Save.

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Details' section with various options like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main area is titled 'Edit Custom Object Employee'. It contains a 'Custom Object Definition Edit' form with fields for Label (Employee), Plural Label (Employees), and Object Name (Employee). There's also a Description field, Context-Sensitive Help Setting (set to Open the standard Salesforce.com Help & Training window), and a Content Name dropdown set to None. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons. A status bar at the bottom right shows it's 11:46 AM on 3/3/2025.

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

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Details' section with various options like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main area is titled 'Edit Custom Object Organization'. It contains a 'Custom Object Definition Edit' form with fields for Label (Organization), Plural Label (Organizations), and Object Name (Organization). There's also a Description field, Context-Sensitive Help Setting (set to Open the standard Salesforce.com Help & Training window), and a Content Name dropdown set to None. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons. A status bar at the bottom right shows it's 11:47 AM on 3/3/2025.

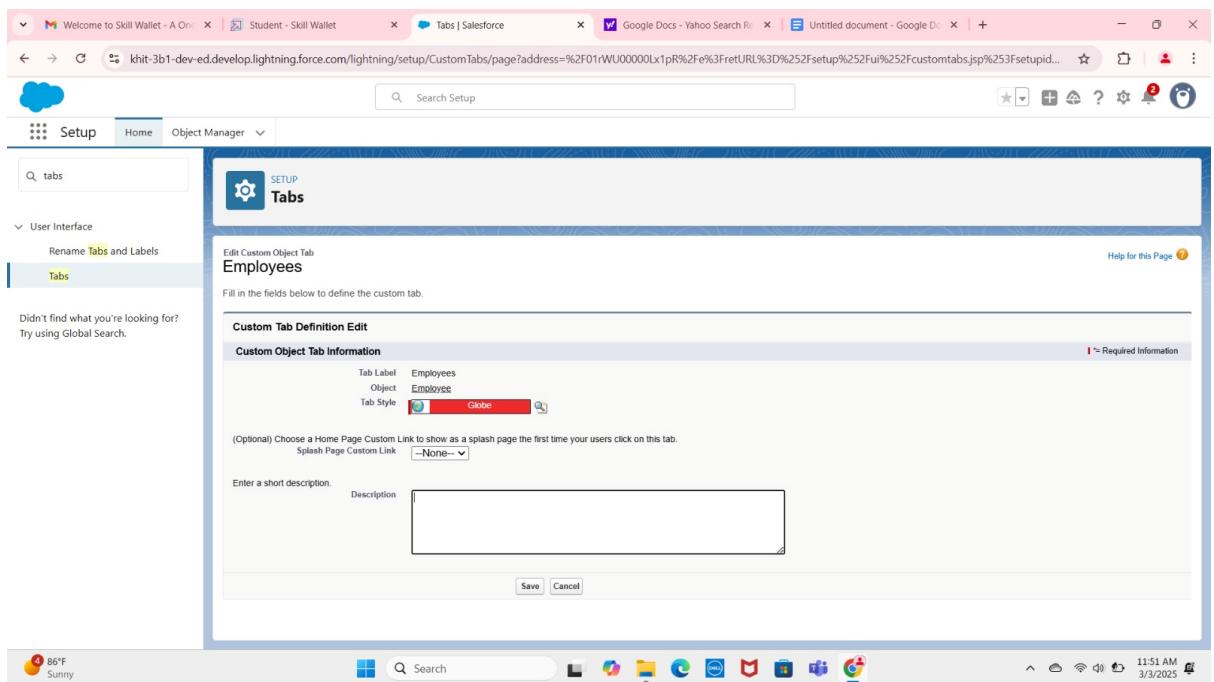
The screenshot shows the Salesforce Setup interface with the title "SETUP > OBJECT MANAGER Health Insurance". On the left, a sidebar lists various object configuration options like Fields & Relationships, Page Layouts, and Record Types. The main panel displays the "Custom Object Definition Edit" for the "Health Insurance" object. It includes fields for "Label" (set to "Health Insurance" with an example "Account"), "Plural Label" (set to "Health Insurances" with an example "Accounts"), and "Object Name" (set to "Health\_Insurance" with an example "Account"). A note at the top warns about changing the name or label. The "Description" field is empty. Context-sensitive help settings and content names are also present. At the bottom, there's a note about record names appearing in various contexts. The status bar at the bottom right shows it's 11:50 AM on 3/3/2025.

This screenshot shows the "Leave" object setup page. The sidebar and main panel structure are identical to the "Health Insurance" setup page. The "Custom Object Definition Edit" panel shows "Label" set to "Leave" (example: Account) and "Plural Label" set to "Leaves" (example: Accounts). The "Object Name" field is also set to "Leave" (example: Account). The rest of the interface, including the sidebar options and the status bar at the bottom right, is consistent with the previous screenshot.

## Tabs Creation

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

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



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

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

The "Custom Object Tab Information" section shows:

- Tab Label: Health Insurances
- Object: Health Insurance
- Tab Style: Heart (selected)

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.  
Splash Page Custom Link: None

Enter a short description.

Save Cancel

Help for this Page

javascript:srcUp(%27%2F01rWU00000LxNr9%2Fe%3FretURL%3D%252Fsetup%252Fu%252Fcustomtabs.jsp%253Fsetupid%253DCustomTabs%2526retURL%253D%25252Fsetup%25252Fhome%2526appLayout%253Dsetup%2526tour%253D%2526fdfcFrameOrigin%253Dhttps%2525...)

86°F Sunny 11:52 AM 3/3/2025

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

The "Custom Object Tab Information" section shows:

- Tab Label: Leaves
- Object: Leave
- Tab Style: Apple (selected)

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.  
Splash Page Custom Link: None

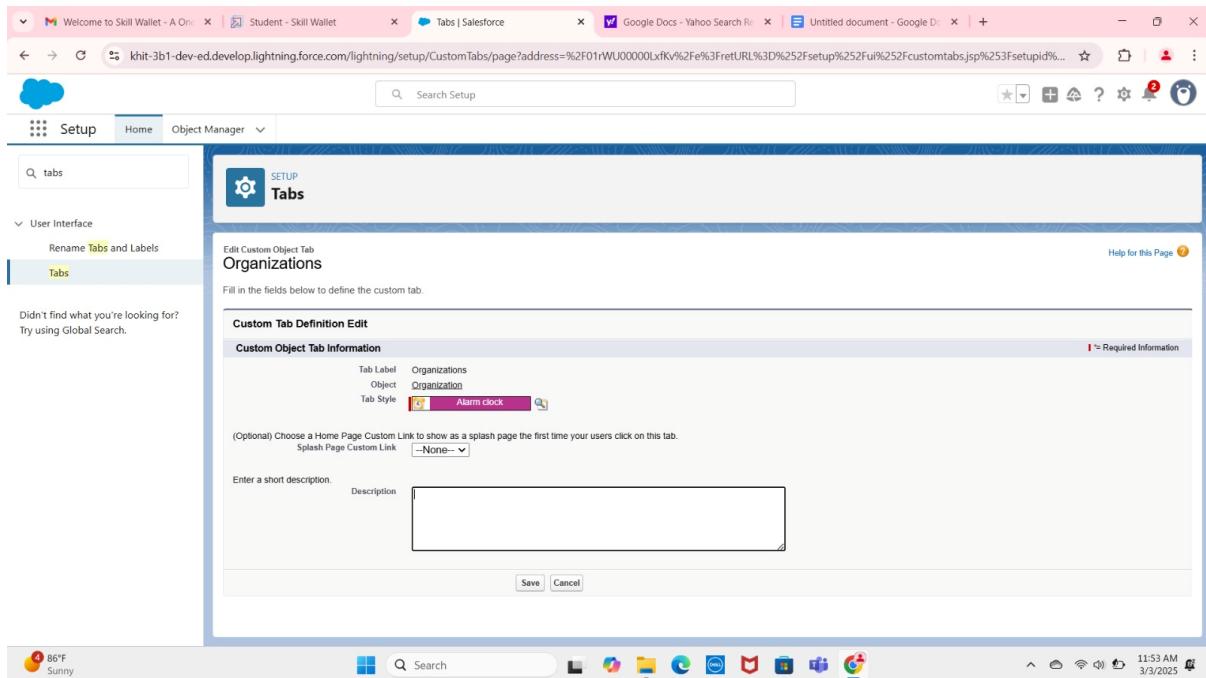
Enter a short description.

Save Cancel

Help for this Page

javascript:srcUp(%27%2F01rWU00000Lx6F7%2Fe%3FretURL%3D%252Fsetup%252Fu%252Fcustomtabs.jsp%253Fsetupid%253DCustomTabs%2526retURL%253D%25252Fsetup%25252Fhome%2526appLayout%253Dsetup%2526tour%253D%2526fdfcFrameOrigin%253Dhttps%2525...)

86°F Sunny 11:52 AM 3/3/2025



## Create a Lightning App

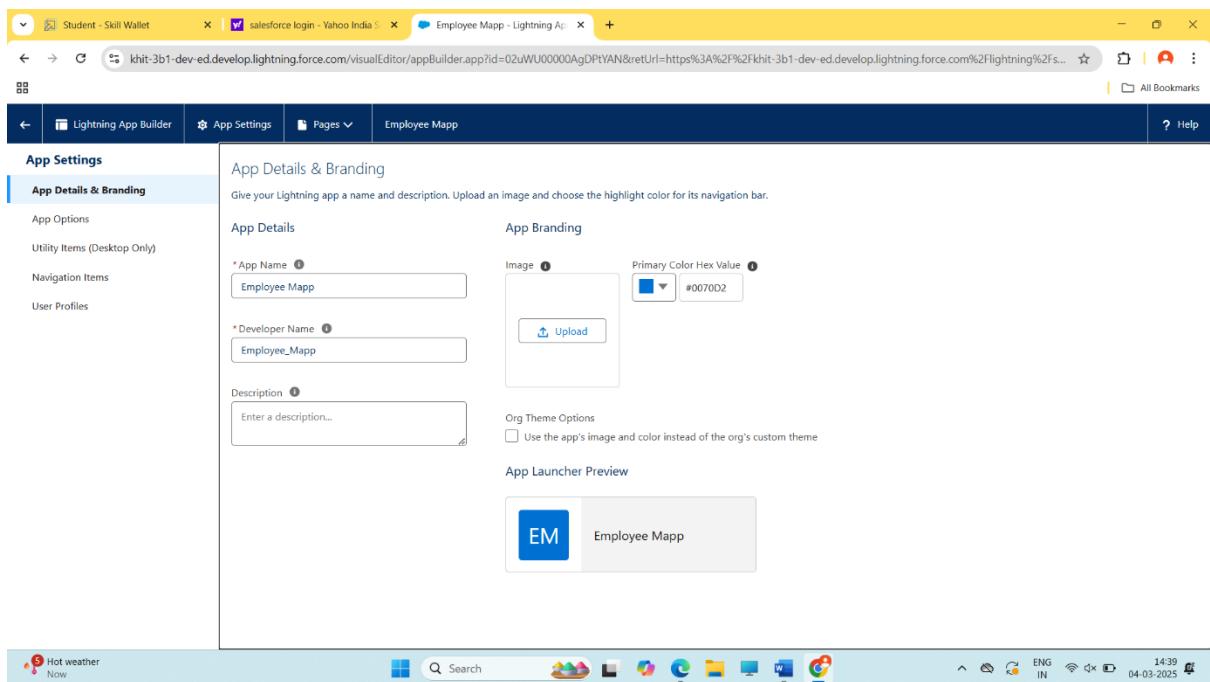
1. Go to setup page >>> search “app manager” in quick find >>> select “app manager” >>> click on new lightning App.

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

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

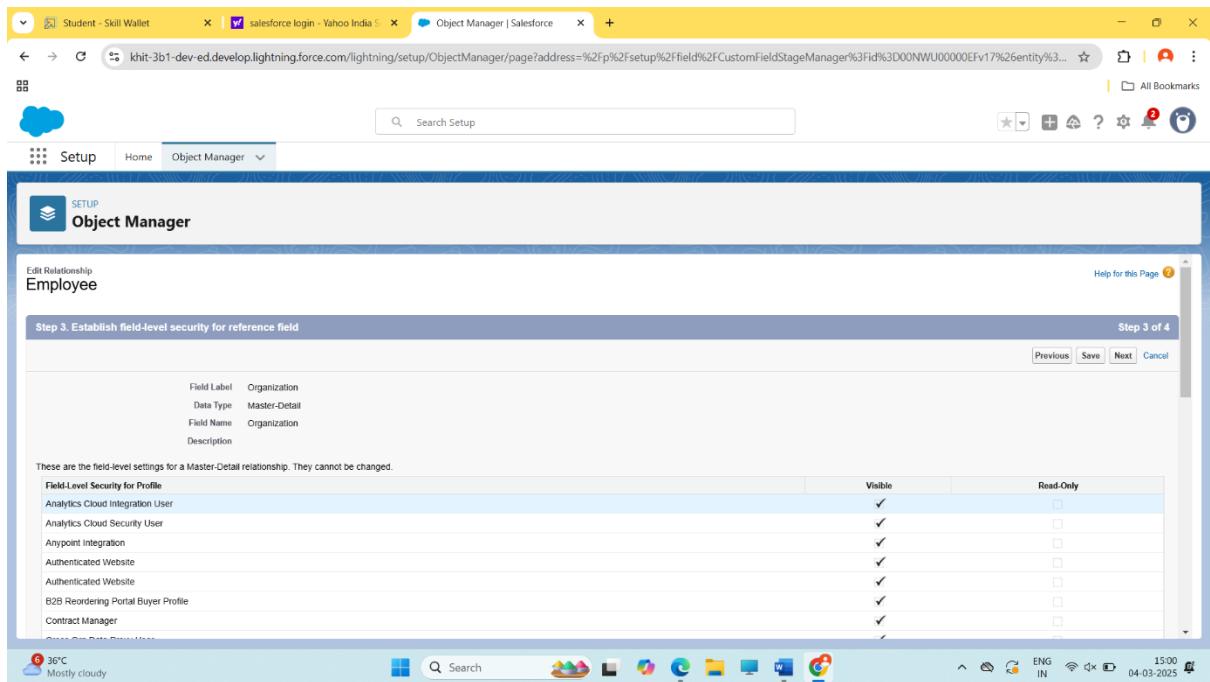
To Add User Profiles:

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



## Creating a Master-Detail Relationship

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



## Creating Lookup Relationship

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Student - Skill Wallet, salesforce login - Yahoo India, and Object Manager | Salesforce. The main title is "Object Manager". The page is titled "Edit Relationship Employee" and "Step 3. Establish field-level security for reference field". The details section shows:

Field Label	Health Insurance
Data Type	Lookup
Field Name	Health_Insurance
Description	

The instructions below say: "Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security." A table lists profiles with checkboxes for "Visible" and "Read-Only".

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The system status bar at the bottom shows: 36°C Mostly cloudy, Search, and various icons including a clock (15:16), date (04-03-2025), and language (ENG IN).

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Student - Skill Wallet, salesforce login - Yahoo India, and Object Manager | Salesforce. The main title is "Object Manager". The page is titled "Edit Relationship Leave" and "Step 3. Establish field-level security for reference field". The details section shows:

Field Label	Employee
Data Type	Lookup
Field Name	Employee
Description	

The instructions below say: "Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security." A table lists profiles with checkboxes for "Visible" and "Read-Only".

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Anypoint Integration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The system status bar at the bottom shows: IND - AUS Live, Search, and various icons including a clock (15:21), date (04-03-2025), and language (ENG IN).

## The Fields Created in Employee Object

This screenshot shows the Salesforce Object Manager interface for the 'Employee' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area displays a table titled 'Fields & Relationships' with 19 items. The table columns are Field Label, Field Name, Data Type, Controlling Field, and Indexed. Key fields include:

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

## The Fields Created in Organization Object

This screenshot shows the Salesforce Object Manager interface for the 'Organization' object. The left sidebar lists various setup categories. The main area displays a table titled 'Fields & Relationships' with 9 items. The table columns are Field Label, Field Name, Data Type, Controlling Field, and Indexed. Key fields include:

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

## The Fields Created in Health Insurance Object

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

- Page Header:** Welcome to Skill Wallet - A One..., Student - Skill Wallet, salesforce login - Yahoo India, Health Insurance | Salesforce.
- Search Bar:** Search Setup.
- Left Sidebar:** Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules.
- Table:** Fields & Relationships (5 items, Sorted by Field Label).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Insurance Company Id	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Text(20)		✓
Owner	OwnerId	Lookup(User,Group)		✓
- Bottom:** Breaking news - 'America is back!', system tray icons, and status bar showing ENG IN, 10:29, 05-03-2025.

## The Fields Created in Leave Object

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

- Page Header:** Welcome to Skill Wallet - A One..., Student - Skill Wallet, salesforce login - Yahoo India, Leave | Salesforce.
- Search Bar:** Search Setup.
- Left Sidebar:** Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers.
- Table:** Fields & Relationships (12 items, Sorted by Field Label).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Duration	Duration_c	Formula (Number)		
Employee	Employee_c	Lookup(Employee)		✓
End Date	End_Date_c	Date		
Health Insurance	Health_Insurance_c	Lookup(Health Insurance)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Leave Name	Name	Auto Number		✓
Leave Status	Leave_Status_c	Picklist		
Leave Type	Leave_Type_c	Picklist		
LeaveID	LeaveID_c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Start Date	Start_Date_c	Date		
- Bottom:** IND - AUS Game score, system tray icons, and status bar showing ENG IN, 10:30, 05-03-2025.

# Create Email Template For Emergency Leave Approval

To create Email Template:

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

Dear {{Employee\_\_c.Name}}

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

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

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

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes tabs for 'Welcome to Skill Wallet - A One...', 'Student - Skill Wallet', 'salesforce login - Yahoo India', and 'Emergency Leave Approved | Sales'. The main content area displays the 'Emergency Leave Approved' Email Template details. The 'Details' tab is selected, showing the following information:

Information	Related
Email Template Name: Emergency Leave Approved	Related Entity Type: Employee
Description: Your emergency leave was approved	Folder: Public Email Templates
Made in Email Template Builder	

The 'Message Content' section contains the following HTML code:

```
Subject: Your Emergency leave was approved  
Dear {{Employee__c.Name}}  
  
I hope this email finds you well. We wanted to inform you that your emergency leave request has been approved.  
Please ensure that all pending tasks are delegated, and you have completed any necessary handovers before proceeding on your leave.
```

The bottom status bar shows system information: LAC - PHX Live - Q4, Search, Enhanced Letterhead, ENG IN, 10:34, 05-03-2025, and battery level.

## Create User 1

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

Fill in the fields

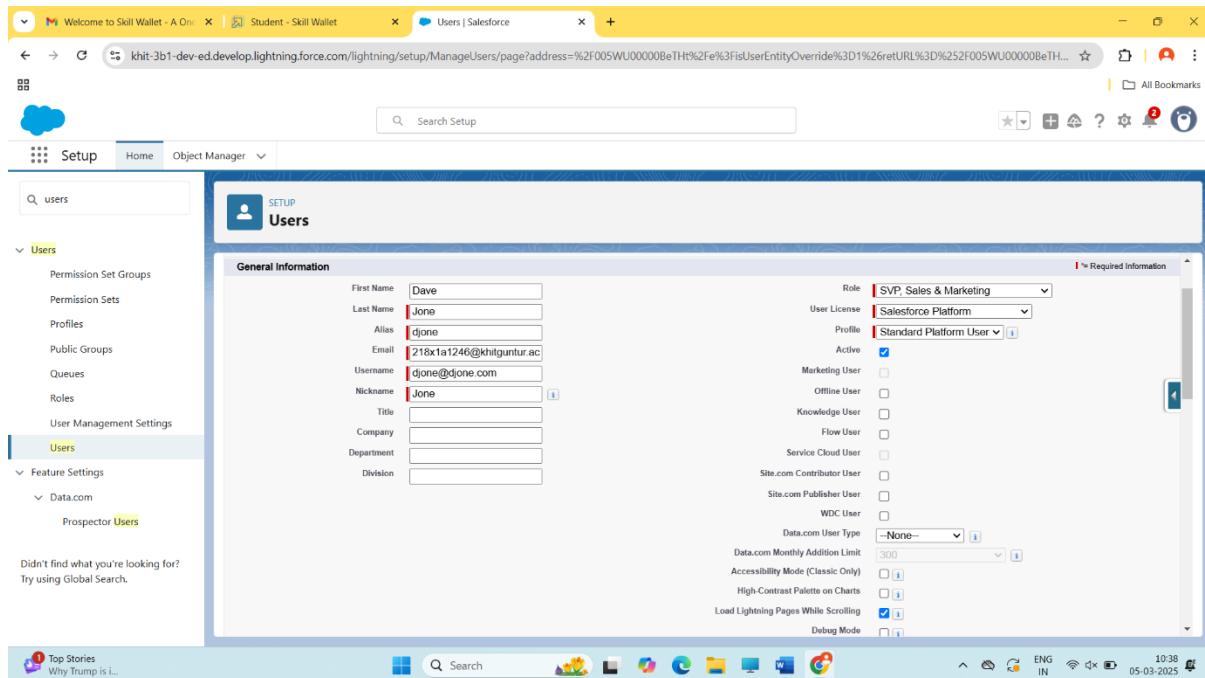
1. First Name: Racheal
2. Last Name: Marc
3. Alias: Give a Alias Name
4. Email id: Give your Personal Email id
5. Username: Username should be in this form: text@text.text
6. Nick Name: Give a Nickname
7. Role: SVP, Human Resources
8. User license: Salesforce Platform
9. Profiles: Standard Platform User

10. Save.

The screenshot shows the Salesforce Setup interface with the 'Users' page open. The 'General Information' section contains the following data:

Field	Value
First Name	Racheal
Last Name	Marc
Alias	rmarc
Email	216x1a1246@khitguntur.ac
Username	rmarc@marc.com
Nickname	Marc
Title	(empty)
Company	(empty)
Department	(empty)
Division	(empty)
Role	SVP, Human Resources
User License	Salesforce Platform
Profile	Standard Platform User
Active	checked
Data.com User Type	-None-

In the same way create user 2 with the name

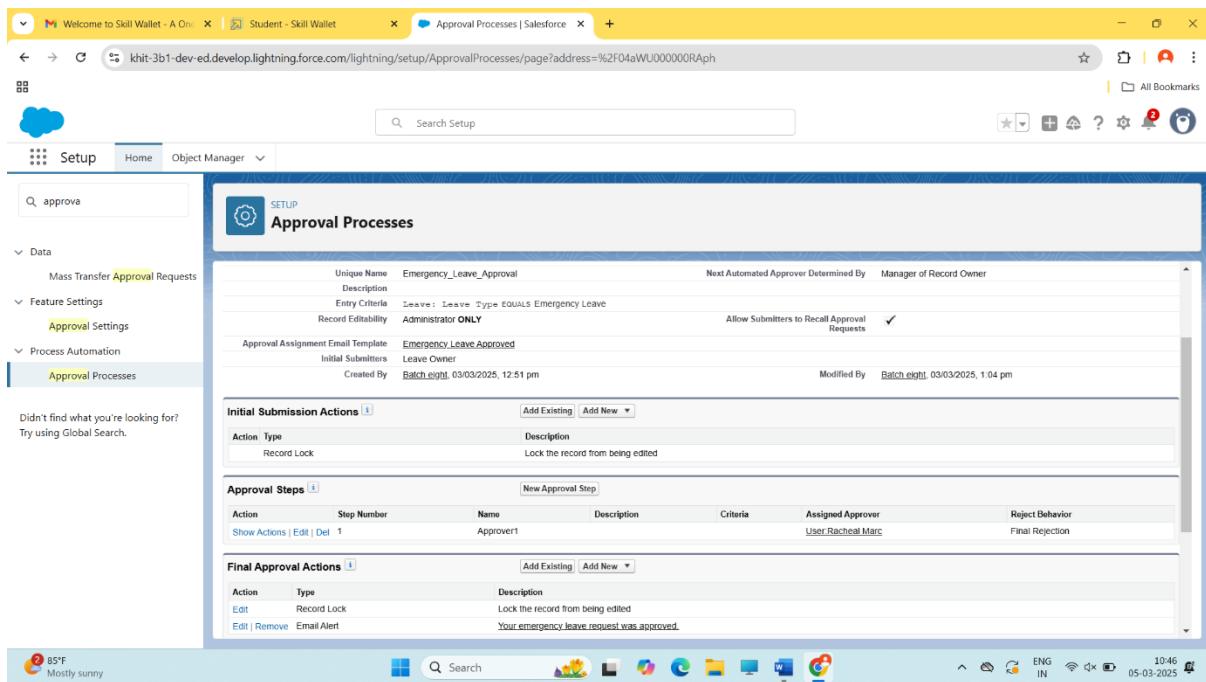
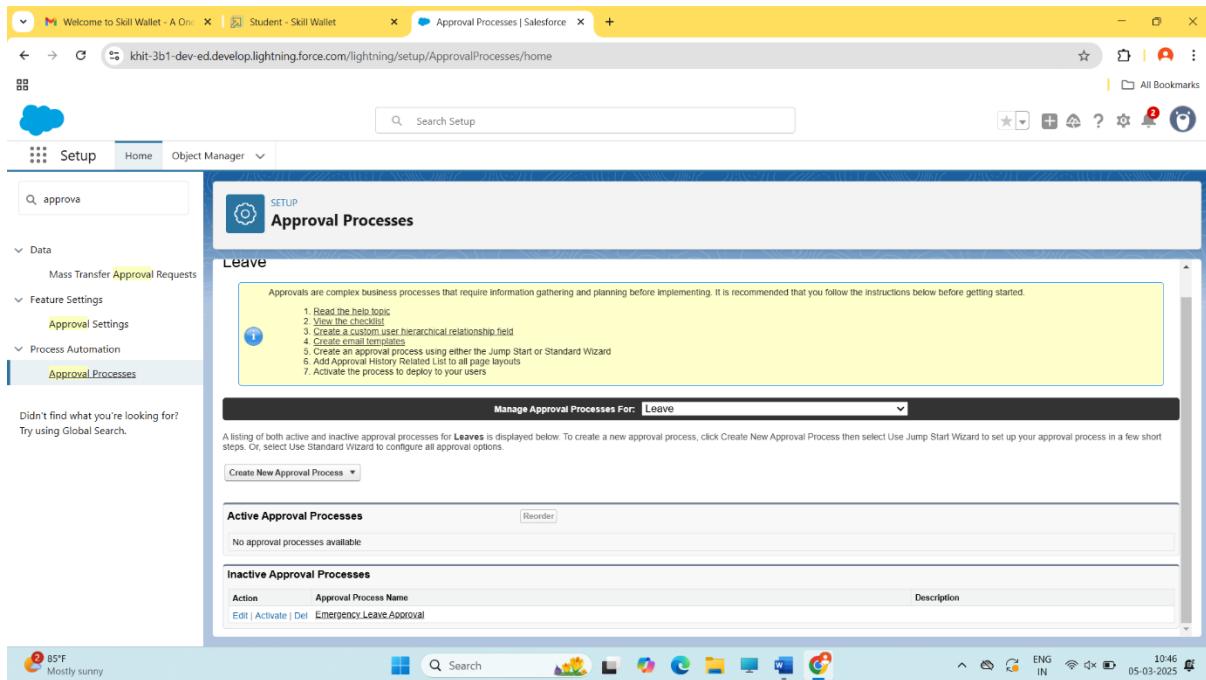


## Create Approval Process For Emergency Leave

To create fields in an object:

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

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



## Create Flow for Shift to start

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

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

{!Emailbody}

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

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

Health Issues If Any: {!\$Record.Health\_Issues\_If\_Any\_c}

Existing Insurance: {!\$Record.Existing\_Health\_Insurance\_c}

Travel Allowance: {!\$Record.Travel\_Allowance\_c}

7. Click "New Resource" under manager.

8. Select "Text Template"

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

10. Click Done.

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

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

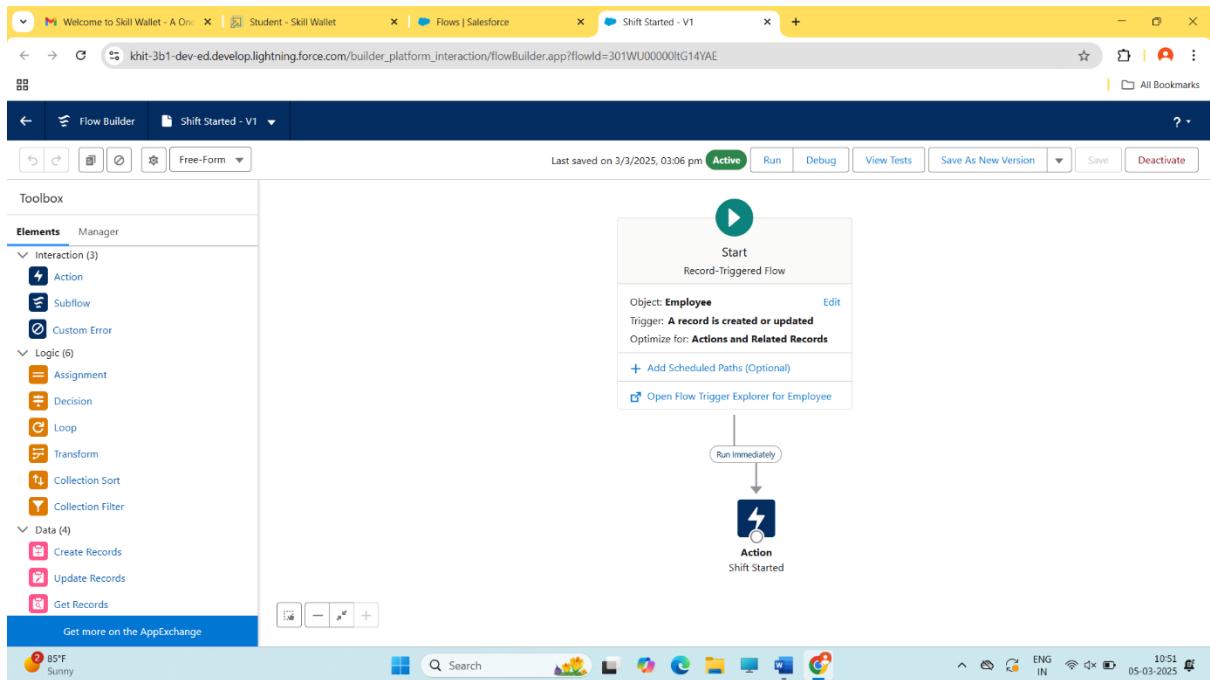
13. Give API name as "Shift Started".

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

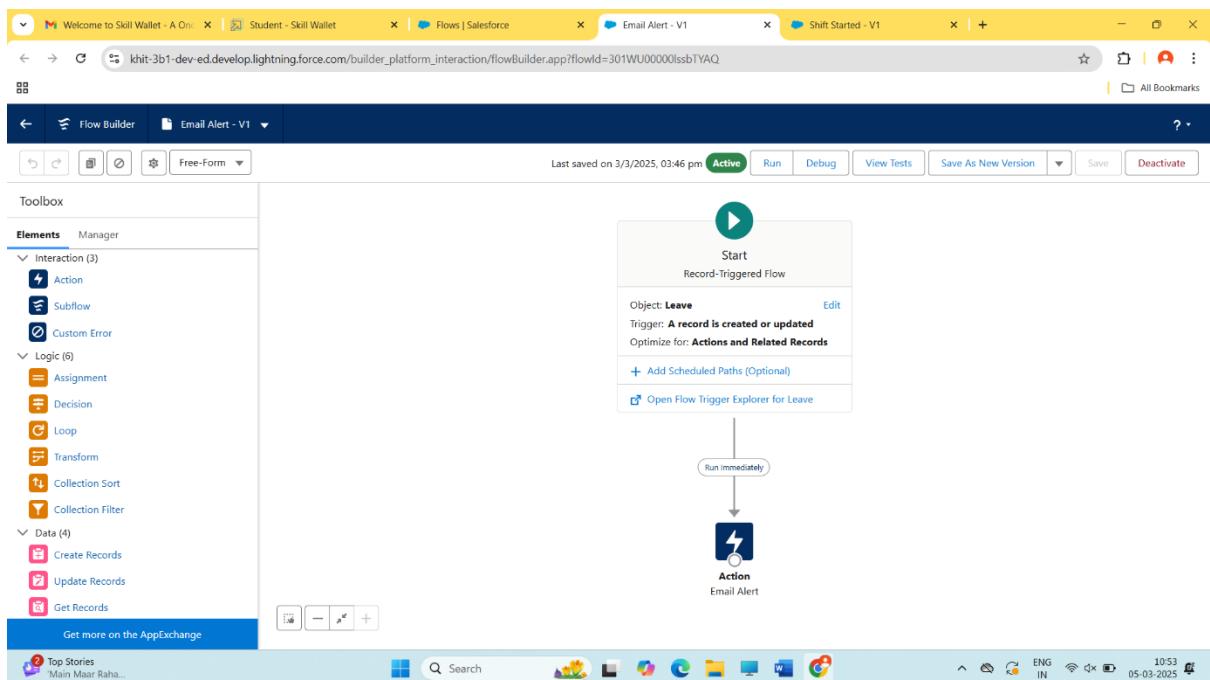
15. Change the toggle to "Include the Subject" Select {!Subject} from the dropdown.

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

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



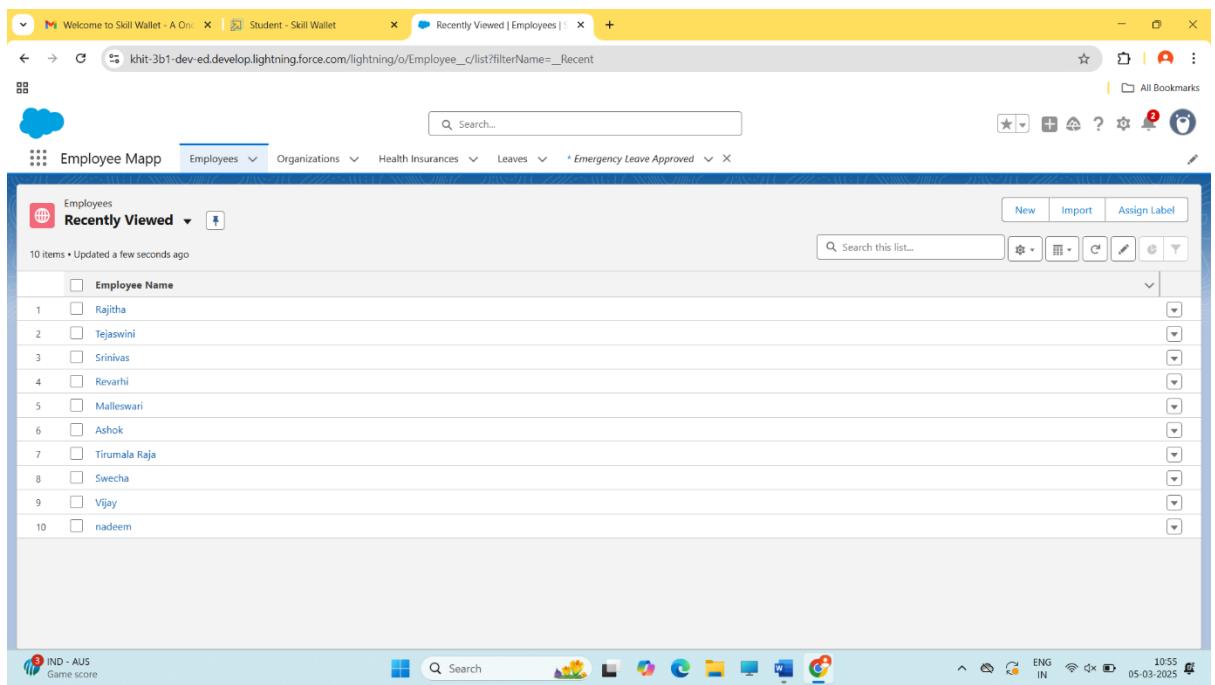
In the same create another flow with the name Email Alert.



# User Adoption

## Create Records for the Employee object

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



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

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

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

Employee Map Employees Organizations Health Insurances Leaves \* Emergency Leave Approved

Organizations Recently Viewed

6 items • Updated a few seconds ago

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

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

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

khit-3b1-dev-ed.lightning.force.com/lightning/o/Health\_Insurance\_c/list?filterName=\_Recent

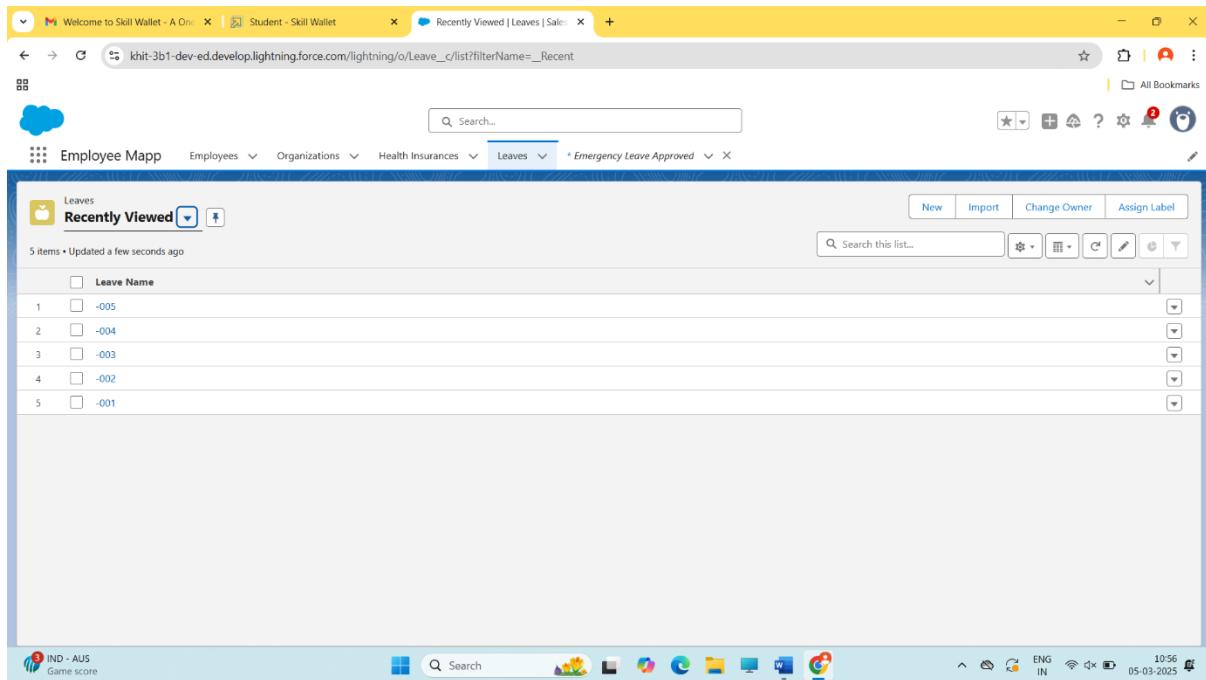
Employee Map Employees Organizations Health Insurances Leaves \* Emergency Leave Approved

Health Insurances Recently Viewed

5 items • Updated a few seconds ago

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

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

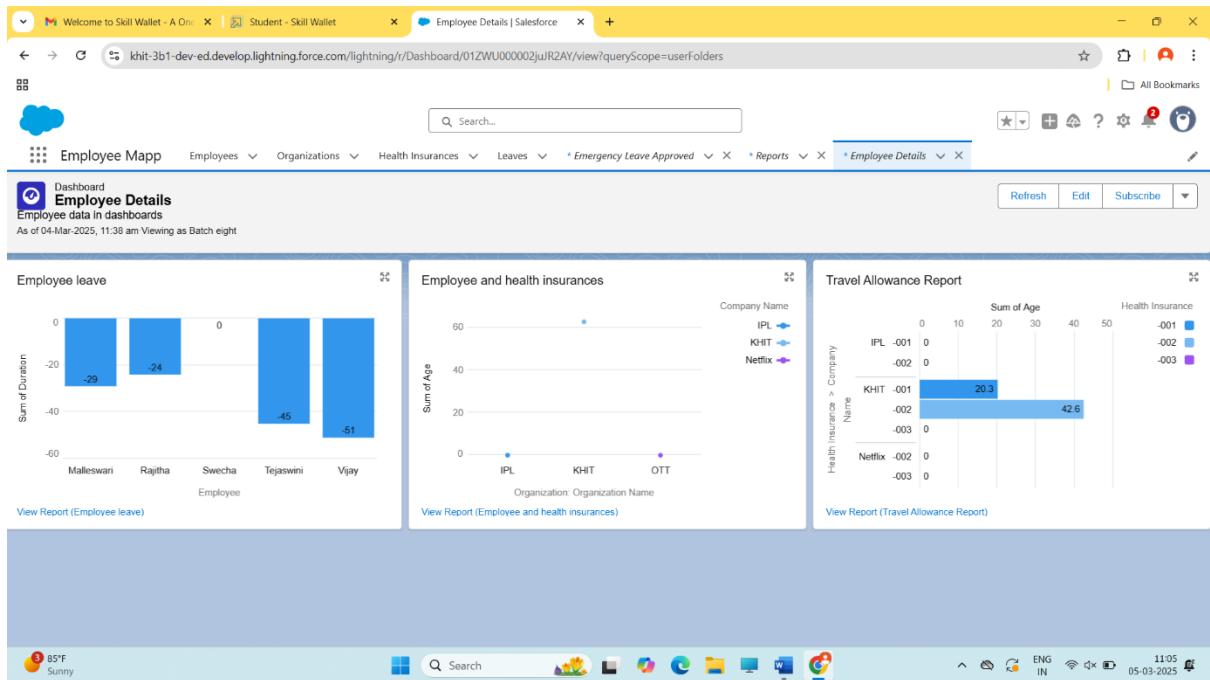


## Create Report

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

## Create Dashboard

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



## 5. Testing and Validation

### Create a Class in Apex

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

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

```

    }

// Fetch employee records

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

// Check eligibility for maternity leave and gender

for (Leave__c leaveRequest : leaveRequests) {

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

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

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

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

        }

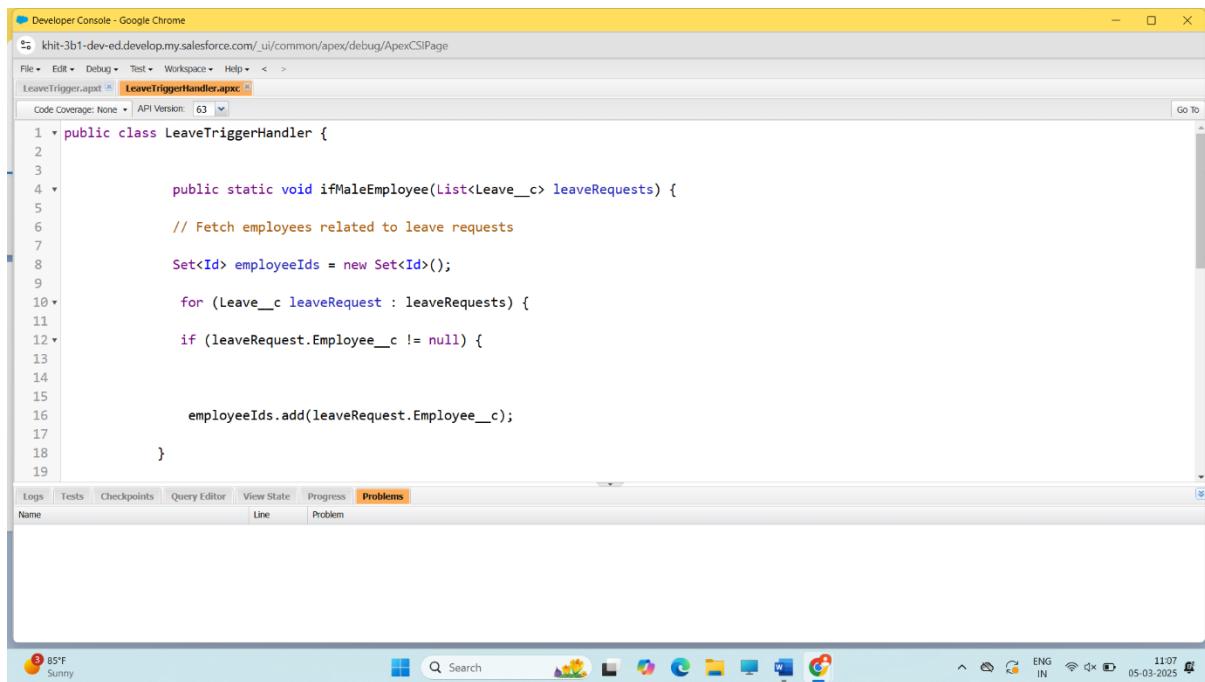
    }

}

}

```

4. Check for errors and save it.



```
1 public class LeaveTriggerHandler {
2
3     public static void ifMaleEmployee(List<Leave__c> leaveRequests) {
4         // Fetch employees related to leave requests
5         Set<Id> employeeIds = new Set<Id>();
6
7         for (Leave__c leaveRequest : leaveRequests) {
8             if (leaveRequest.Employee__c != null) {
9
10            employeeIds.add(leaveRequest.Employee__c);
11        }
12    }
13
14
15
16
17
18
19 }
```

## Create a trigger in Apex

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

```
trigger LeaveTrigger on Leave__c (before insert) {
```

```
    if(trigger.isBefore){  
        if(trigger.isInsert){  
            LeaveTriggerHandler.ifMaleEmployee(trigger.new);  
        }  
    }  
}
```

The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is [khit-3b1-dev-ed.develop.my.salesforce.com/\\_ui/common/apex/debug/ApexCSIPage](https://khit-3b1-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage). The top menu includes File, Edit, Debug, Test, Workspace, Help, and a Go To button. A tabs bar shows 'LeaveTrigger.apc' and 'LeaveTriggerHandler.apc'. The main area displays the following Apex trigger code:

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

Below the code, there is a 'Problems' tab in the navigation bar. The system status bar at the bottom shows it's 85°F sunny, the date is 05-03-2025, and the time is 11:07.

## 6.Key Scenarios Addressed by Salesforce in the Implementation Project

### Scenario 1: Employee Onboarding

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

### Scenario 2: Employee Data Management

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

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

### **Scenario 3: Managerial Tasks and Approvals**

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

### **Scenario 4: Reporting and Analytics**

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

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

## **7. Conclusion**

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