



# **BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES**

## **SALESFORCE NAAN MUDHALVAN PROJECT REPORT**

*Submitted By*

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*in partial fulfilment for the award of the degree*

*of*

**BACHELOR OF TECHNOLOGY**

**In**

**INFORMATION TECHNOLOGY**

**MAHENDRA ENGINEERING COLLEGE FOR WOMEN**

**KUMARAMANGALM - 637205**

## **BONAFIDE CERTIFICATE**

Certified that this project report titled “**BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES**” is the Bonafide work of “**ABI K(611420205001), JAYASAKTHI J(611420205015), SANTHINI S (611420205033), SAVITHIRI E (611420205035)**” who carried out the project work under my supervision.

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## ACKNOWLEDGEMENT

At the outset, we express our heartfelt gratitude to **GOD**, who has been our strength to bring this project to light.

At this pleasing moment of having successfully completed our project, we wish to convey our sincere thanks and gratitude to our beloved president **Mr. C. Balakrishnan**, who has provided all the facilities to us. We would like to convey our sincere thanks to our beloved Principal **Dr. PSS. Srinivasan**, for forwarding us to do our project and offering adequate duration in completing our project.

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# 1.INTRODUCTION

Salesforce, a leading cloud-based Customer Relationship Management (CRM) platform, is a pivotal tool for organizations to manage customer data, optimize sales processes, and elevate customer interactions. Its multifaceted features include Sales Cloud, which enhances sales management through lead tracking, opportunity management, and seamless email integration. Service Cloud focuses on exceptional customer support, featuring case management, knowledge base development, and multi-channel support. Marketing Cloud empowers businesses with marketing automation, email campaigns, social media engagement, and in-depth analytics. Salesforce's hallmark is its customizability, allowing businesses to tailor the platform to meet specific requirements, while robust integration capabilities facilitate seamless connections with other business applications.

The platform equips businesses with powerful reporting and analytics tools, enabling data-driven decisions and insightful, customized reports and dashboards. Salesforce ensures mobile accessibility, enabling users to stay connected and productive while on the move. A paramount emphasis on data security and compliance guarantees data protection and privacy. Whether you're a small start-up or a large enterprise, Salesforce offers scalability to accommodate your evolving needs.

Through Salesforce, organizations foster improved customer relationships, increased sales efficiency, and superior customer support. It empowers businesses to make data-driven decisions, streamline operations, and create impactful, targeted marketing campaigns. This introduction encapsulates Salesforce's capabilities and benefits, offering a concise overview for your project document, allowing for a better understanding of how the platform can contribute to your specific project goals.

## **2.PROJECT SPECIFICATIONS**

### **2.1 Project Goal:**

The primary goal of the Employee Travel Approval Application in Salesforce for corporates is to optimize and streamline the management of employee travel requests and approvals. The project aims to provide a user-friendly and efficient solution that automates approval workflows, ensures real-time visibility and notifications, and simplifies expense tracking and reimbursement. User training and support are essential for ensuring adoption, and the application should be scalable and highly customizable to meet evolving organizational needs. Overall, the project's focus is on enhancing productivity, cost control, and compliance with corporate policies in the realm of travel management.

### **2.2 Project Scope • User Registration**

#### **(Milestone 1):**

Establish a registration portal to input and verify employee details, managers, approvers, and administrative personnel.

- **Tabs Creation (Milestone 2):**

Tabs will be configured to segment and simplify access to different sections of the application, such as travel requests, approvals, feedback, and reporting.

- **App Creation (Milestone 3):**

The Employee Travel Approval Application will be launched, serving as the primary hub for submitting, reviewing, and approving corporate travel.

- **Fields & Relationships (Milestone 4):**

Custom fields and relationships will be defined to capture travel details like destination, dates, expenses, and justifications. Relationships between employees, managers, and travel modules will be structured to streamline the approval chain.

- **Profile Configuration (Milestone 5):**

User profiles will be set up to dictate roles, access permissions, and interaction levels within the application. •

- **Role and Role Hierarchy (Milestone 6):**

The platform will structure role-based access controls to specify who can view, edit, or approve travel requests, with hierarchies such as junior employees, senior employees, team leads, and department heads.

- **Users Management (Milestone 7):**

Users will be added and configured based on their roles within the organization. This step involves determining the permissions and access levels for each user category. •

- **Sharing Rules (Milestone 8):**

Predefined criteria will inform sharing rules, ensuring data is appropriately shared and accessed, maintaining confidentiality where needed.

- **User Adoption Strategies (Milestone 9):**

Tools, training sessions, and guides will be introduced to ensure users can efficiently utilize the application. Feedback loops will be set up to continually enhance user experience. •

- **Reports Generation (Milestone 10):**

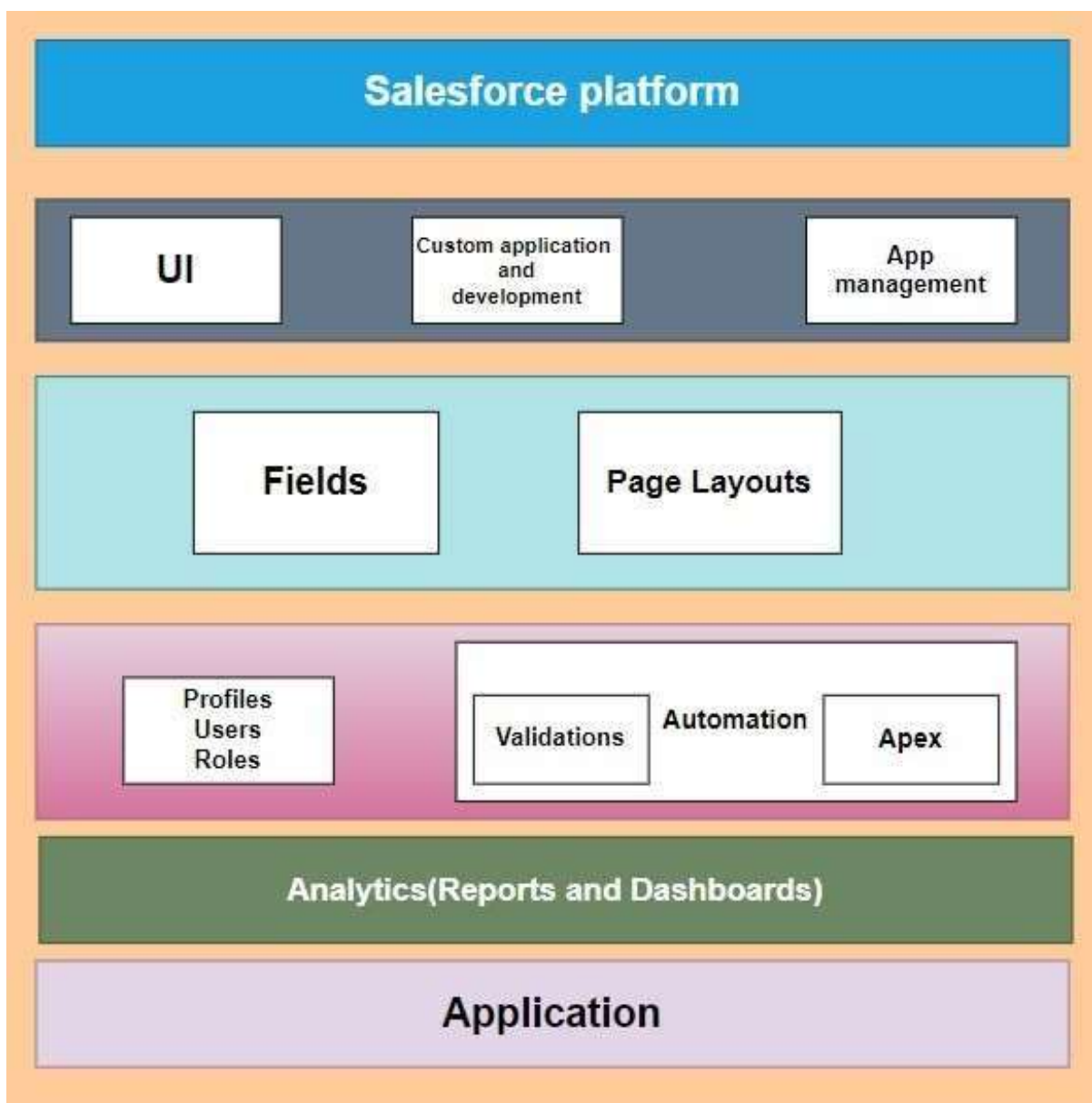
Custom reports will be developed, offering stakeholders insights into travel trends, expenses, approval durations, and policy adherence. •

- **Dashboards Development (Milestone 11):**

Visual dashboards will be designed, showcasing KPIs, travel analytics, and summary reports for a swift overview and decision-making.

- The project is set to deliver a unified solution for corporates, turning the travel approval process into a strategic, transparent, and efficient function.

## 2.3 Technical Requirements





## 2.4 Functional Requirements

- **User Registration and Authentication:** Provide a registration and login system for employees, approvers, and administrators to access the application securely.
- **Travel Request Submission:** Allow employees to submit travel requests, providing essential details such as travel dates, destinations, purpose, and estimated expenses.
- **Customizable Approval Workflows:** Support the configuration of approval workflows, including the ability to set approval criteria, create multi-level approval hierarchies, and define routing rules.
- **Real-time Notifications:** Automate email notifications to keep employees informed about the status of their travel requests and notify approvers when their input is required.
- **Expense Tracking:** Enable employees to record and track travel-related expenses, categorizing them for easy reference and reimbursement.
- **Approval Management:** Provide a dashboard for approvers to review and approve travel requests, with the ability to leave comments or request additional information.
- **Reporting and Analytics:** Offer a suite of reporting tools to generate insights into travel expenses, approval trends, and policy compliance. These reports should be customizable and accessible to authorized users.
- **Mobile Accessibility:** Ensure that the application is accessible on mobile devices, allowing users to submit requests and perform approvals on the go.

- **Security and Access Control:** Implement robust security measures and role-based access control to protect sensitive travel data and ensure that only authorized personnel can access, edit, and approve travel requests.
- **Integration Capabilities:** Support integration with other corporate systems, such as accounting and HR software, to streamline expense tracking, data sharing, and synchronization of travel data.
- **User Training and Support:** Provide training materials and support resources for users and approvers to ensure they can navigate and utilize the application effectively.
- **Scalability and Customization:** Design the application to be highly scalable, allowing it to adapt to the evolving needs of the organization. Ensure it can be customized to accommodate specific workflows and policies.
- **Compliance Features:** Include features to ensure compliance with corporate and regulatory policies, including the ability to capture and store necessary documentation for audits.
- **Budget Management:** Implement tools for tracking and managing travel budgets, helping organizations stay within financial limits.
- **Expense Reimbursement:** Facilitate the expense reimbursement process by allowing approvers to verify expenses and trigger reimbursement to employees.
- **User Profiles and Roles:** Define user profiles and roles to determine who can perform specific actions within the application.
- **Approval History and Audit Trail:** Maintain an audit trail and history of all travel requests, approvals, and changes for transparency and accountability.

- **Notifications and Reminders:** Send automated reminders and notifications to users for pending actions, approvals, and upcoming trips.
- **Document Management:** Provide a repository for storing travelrelated documents, such as itineraries, receipts, and approvals.
- **Multi-platform Support:** Ensure compatibility with various web browsers and devices, enhancing user accessibility.

### 3.PREPARATION DATA MODELING

#### Objects:

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

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.

In This Application We Use 9 Standard Objects:

1. Account
2. Contact.
3. Opportunity
4. Lead.
5. Case
6. Task and Event
7. User
8. Product
9. Custom Object.

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.

In This Application We Use 5 Custom Objects:

1. Employee Details
2. Expense
3. Expense Item
4. Travel Approval

### **1) Create A Custom Object for Employee Details:**

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Click the "Gear" icon and select "Setup" to access the Salesforce Setup menu.

Step 3: In Setup, find "Objects" and select "Object Manager."

Step 4: Click the "Create" button to create a new custom object.

Step 5: Object Settings

Label: Enter "Employee Detail."

Plural Label: Enter "Employee Details."

Step 6: Choose to auto-number records or manually specify the record name as "Employee Name."

Step 7: Select "Text" as the data type for the record name.

Step 8: Ensure "Deployed" is selected for deployment status.

Select "Allow Search" for search status

Step 9: In the "Optional Features" section, check "Allow Reports" and "Track Field History."

Step 10: Click "Save" to create the "Employee Detail" object.

The screenshot shows the Salesforce Setup interface for creating a new custom object. The browser address bar displays the URL: `smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015j0000003gM/edit?address=%2F015j0000003gM%2FrefURL%2F`. The page title is "SETUP > OBJECT MANAGER Employee Detail". The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled "Custom Object Definition Edit" and includes buttons for "Save", "Save & New", and "Cancel". Below this is the "Custom Object Information" section, which contains the following fields: "Label" (Employee Detail), "Plural Label" (Employee Details), "Starts with vowel sound" (unchecked), "The Object Name is used when referencing the object via the API" (Employee\_Detail), "Description" (empty text area), "Context-Sensitive Help Setting" (radio buttons for "Open the standard Salesforce.com help & Training window" and "Open a window using a Visualforce page"), and "Context Name" (empty text field). A red banner at the bottom of the main content area reads "Enter Record Name Label and Format".

The screenshot shows the Salesforce Setup interface for defining a custom field for the "Employee Detail" object. The browser address bar displays the URL: `smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015j0000003gM/FieldsAndRelationships/015j0000003gM/edit`. The page title is "SETUP > OBJECT MANAGER Employee Detail". The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled "Custom Field Definition Edit" and includes buttons for "Change Field Type", "Save", and "Cancel". Below this is the "Field Information" section, which contains the following fields: "Field Label" (Date of Birth), "Field Name" (Date\_of\_Birth), "Field Type" (Date), "Description" (empty text area), "Help Text" (empty text area), "Date Format" (User), "Field Usage" (-None-), "Date Accessibility Level" (-None-), and "Compliance Categorization" (Available, Chosen). The "Available" and "Chosen" categories are listed as: PI, HIPAA, GDPR, BC's.

smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115000003qN4/FieldsAndRelationships/00N500005AC04/view

Setup Home Object Manager

### SETUP • OBJECT MANAGER

## Employee Detail

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

#### Employee Detail Custom Field

Date of Birth

Back to Employee Detail

Custom Field Definition Detail

Field Information

Field Label	Date of Birth	Object Name	Employee Detail
Field Name	Date_of_Birth	Date Type	Date
API Name	Date_of_Birth__c		
Description			
Help Text			
Date Owner			
Field Storage			
Date Sensitivity Level			
Compliance Categorization			
Created By	Gajathri Subramani 17/10/2023, 11:38 am		Modified By Gajathri Subramani 17/10/2023, 11:38 am

General Options

Required ☐

Default Value

smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115000003qN4/FieldsAndRelationships/00N500005AC04/view

Setup Home Object Manager

### SETUP • OBJECT MANAGER

## Employee Detail

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

#### Employee Detail Custom Field

Gender

Back to Employee Detail

Custom Field Definition Detail

Field Information

Field Label	Gender	Object Name	Employee Detail
Field Name	Gender	Date Type	Picklist
API Name	Gender__c		
Description			
Help Text			
Date Owner			
Field Storage			
Date Sensitivity Level			
Compliance Categorization			
Created By	Gajathri Subramani 17/10/2023, 11:57 am		Modified By Gajathri Subramani 17/10/2023, 11:57 am

General Options

Required ☐

Default Value

smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115000003qH4TwedukvRelationships/00N5000004Cuiwpt

Setup Home Object Manager

## SETUP + OBJECT MANAGER Employee Detail

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Layouts

Record Types

Related Lookup Filters

Search Layouts

Back Employee Detail Custom Field

### Employee Id

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label Employee Id Data Type Text

Field Name Employee\_ID

Description

Help Text

Data Owner User

Field Usage None

Data Security Level None

Compliance Categorization

Available

PII

HIPAA

GDPR

BCI

Chosen

Help for this Page

smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115000003qH4TwedukvRelationships/00N5000004Cuiwpt/view

Setup Home Object Manager

## SETUP + OBJECT MANAGER Employee Detail

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Layouts

Record Types

Related Lookup Filters

Search Layouts

Employee Detail Custom Field

### Department

Back to Employee Detail

Custom Field Definition Detail

Edit Get Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label Department Object Name Employee Detail

Field Name Department Data Type Lookup

API Name Department\_\_c

Description

Help Text

Data Owner

Field Usage

Data Security Level

Compliance Categorization

Created By GAUKTHIR SUBRAMANIAM 17/10/2023 11:56 am

Modified By GAUKTHIR SUBRAMANIAM 17/10/2023 11:56 am

Lookup Options

Related To Department

Related List Label Employee Details

Child Relationship Name Employee\_Details

smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01U5000003qN4/FieldsAndRelationships/00N50000058Cui/view

Search Setup

SetupHomeObject Manager

SETUP • OBJECT MANAGER

Employee Detail

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Employee Detail Custom Field

Employee Id

Back to Employee Detail

Custom Fields (1)

Custom Field Definition Detail

EditGet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Employee Id	Object Name	Employee Detail
Field Name	Employee__ID	Data Type	Text
API Name	Employee_ID__f		
Description			
Help Text			
Data Owner			
Field Usage			
Field Security Level			
Compliance Categorization			
Created By	QAYATHRI SUBRAMANIAM 11/10/2023, 11:52 am	Modified By	QAYATHRI SUBRAMANIAM 11/10/2023, 11:52 am

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>



## **2)Creation of Expense:**

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Click the "Gear" icon and select "Setup" to access the Salesforce Setup menu.

Step 3: In Setup, find "Objects" and select "Object Manager."

Step 4: Click the "Create" button to create a new custom object.

Step 5: Object Settings

Label: Enter "Expense."

Plural Label: Enter "Expenses."

Step 6: Choose to auto-number records or manually specify the record name as "Expense Name."

Step 7: Select "Text" as the data type for the record name.

Step 8: Ensure "Deployed" is selected for deployment status.

Select "Allow Search" for search status.

Step 9: In the "Optional Features" section, check "Allow Reports" and "Track Field History."

Step 10: Click "Save" to create the "Expense" object.

Customize the object by adding fields to capture relevant expense information, such

expense type, amount, date, and a lookup field to associate expenses with a specific

travel request.

Configure page layouts, security settings, and sharing rules as needed.



smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0113j000003qNuFieldsAndRelationships/00N5j0000054C3F6/view

Search Setup

Setup Home Object Manager

EXPENSE + OBJECT MANAGER  
Expense

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

Expense Custom Field  
Total Item  
Roll-Up Summary

Custom Field Definition Detail

Field Information

Field Label	Total Item	Object Name	EXPENSE
Field Name	Total_Item		
API Name	Total_Item__c		
Description			
Help Text			
State Owner			
Field Usage			
Date Sensitivity Level			
Compliance Categorization			
Created By	GAJATHIR SUBRAMANIAM	Created On	23/10/2023, 8:04 pm
Modified By	GAJATHIR SUBRAMANIAM	Modified On	23/10/2023, 8:04 pm

Roll-Up Summary Options

Roll-Up Summary	Summary Type	COUNT
Summary Name		
Filter Criteria		

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0113j000003qNuFieldsAndRelationships/00N5j0000054C3F6/edit

Search Setup

Setup Home Object Manager

EXPENSE + OBJECT MANAGER  
Expense

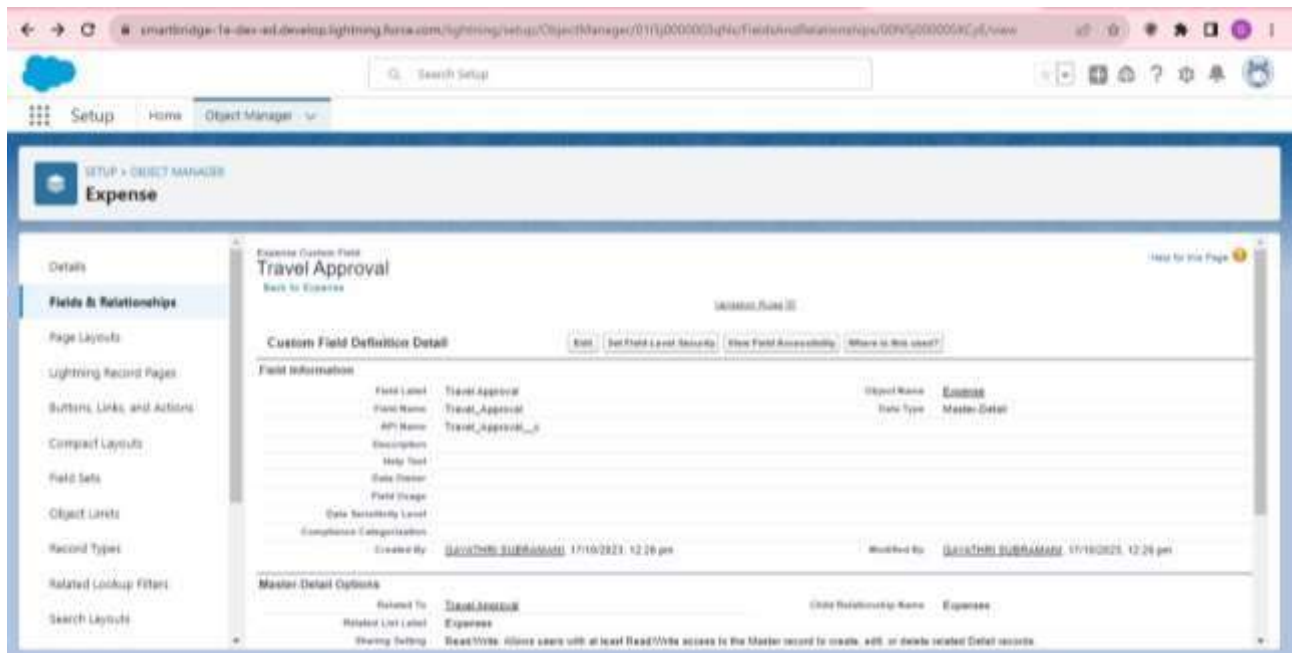
Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts

Edit Expense Custom Field  
Travel Approval

Custom Field Definition Edit

Field Information

Field Label	Travel Approval	Data Type	Master-Detail
Field Name	Travel_Approval		
Description			
Help Text			
State Owner	User		
Field Usage	-None-		
Date Sensitivity Level	-None-		
Compliance Categorization	Available PII HIPAA GDPR	Chosen	



### 3) Creation of Expense Item:

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Click the "Gear" icon and select "Setup" to access the Salesforce Setup menu.

Step 3: In Setup, find "Objects" and select "Object Manager."

Step 4: Click the "Create" button to create a new custom object.

Step 5: Object Settings

Label: Enter "Expense Item."

Plural Label: Enter "Expense Items."

Step 6: Choose to auto-number records or manually specify the record name as "Item Name" or "Expense Item Name."

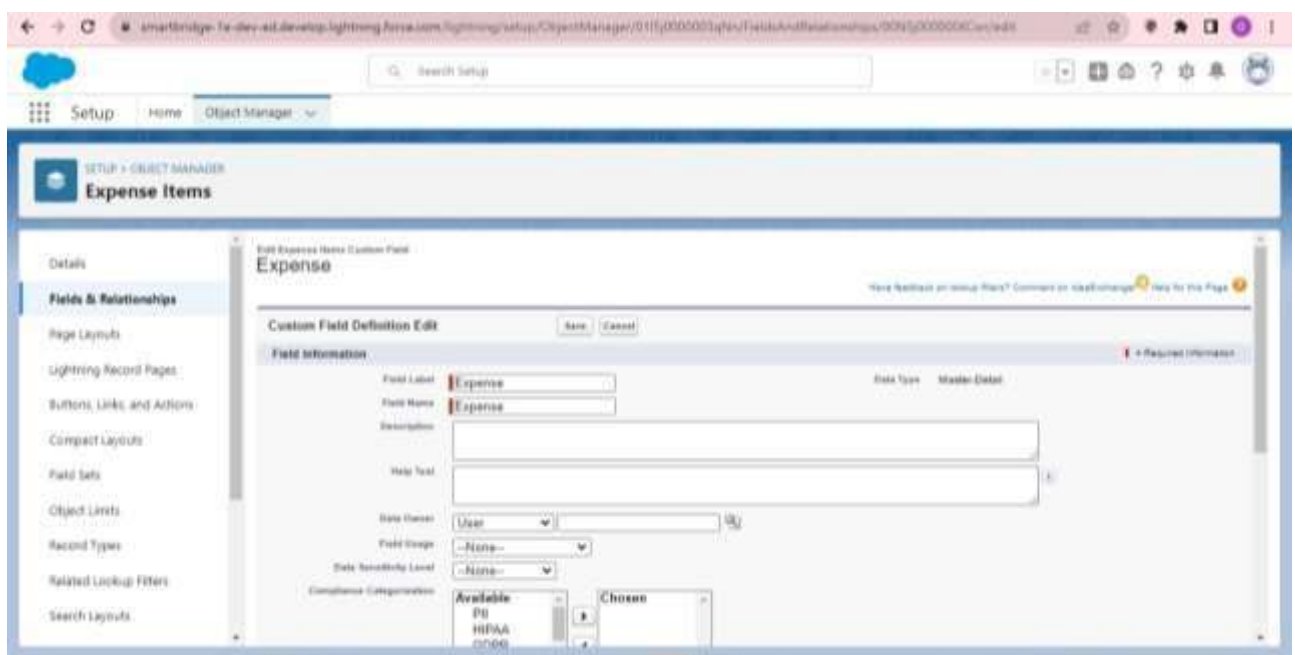
Step 7: Select "Text" as the data type for the record name.

Step 8: Ensure "Deployed" is selected for deployment status.

Select "Allow Search" for search status.

Step 9: In the "Optional Features" section, check "Allow Reports" and "Track Field History."

Step 10: Click "Save" to create the "Expense Item" object.



smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115000003qNs/FieldsAndRelationships/00N50000056Cw/view

Setup Home Object Manager

### Expense Items

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

#### Expense Items Custom Field

## Expense

Back to Expense Items

Validation Rules 0

Custom Field Definition Detail

Edit Set Field Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Expense	Object Name	Expense_Item		
Field Name	Expense	Data Type	Master-Detail		
API Name	Expense__c				
Description					
Help Text					
Date Owner					
Field Usage					
Date Sensitivity Level					
Compliance Categorization					
Created By	QARATHRI SUBRAMANIAM	17/10/2023, 12:02 pm	Modified By	QARATHRI SUBRAMANIAM	17/10/2023, 12:02 pm

Master-Detail Options

Related To	Expense	Child Relationship Name	Expense_Items
Related List Label	Expense Items		
Sharing Setting	Read/Write. Access users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115000003qNs/FieldsAndRelationships/00N50000056Cw/edit

Setup Home Object Manager

### Expense Items

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

#### Edit Expense Items Custom Field

## Expense Type

Custom Field Definition Edit

Change Field Type Promote to Global Value Set Save Cancel

Field Information

Field Label Expense Type Data Type Text

Field Name Expense\_Type

Description

Help Text

Date Owner User

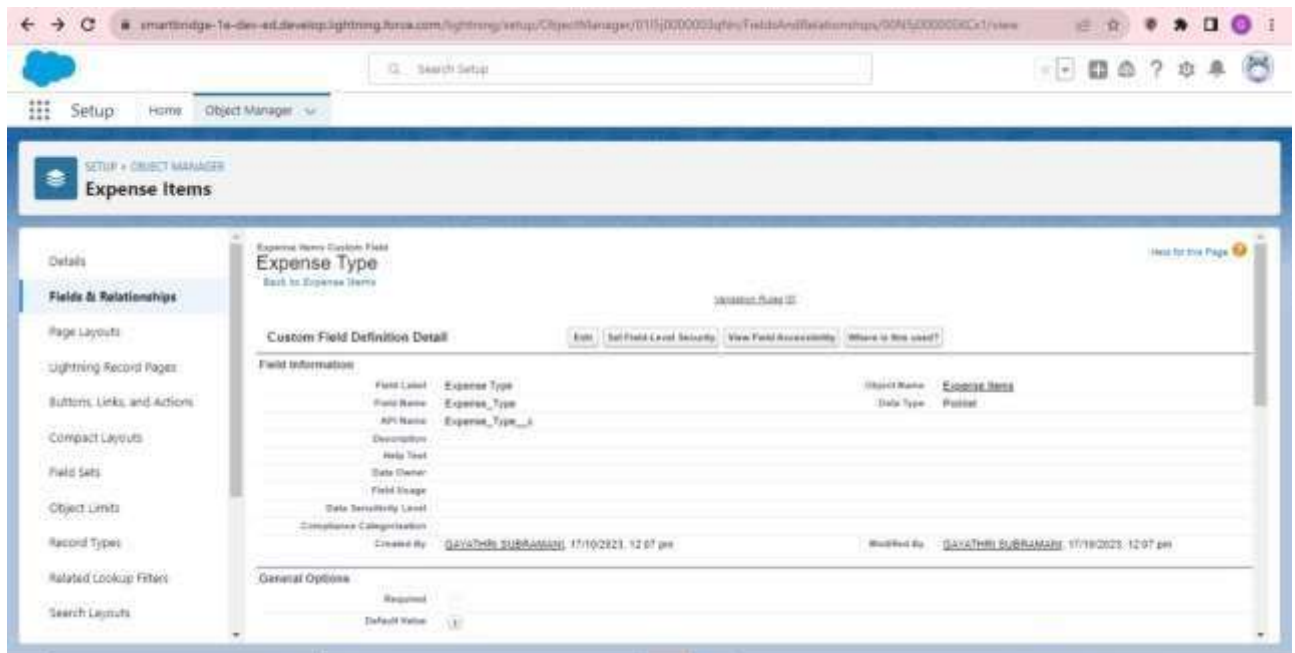
Field Usage None

Date Sensitivity Level None

Compliance Categorization

Available: PI, HIPAA, GDPR, PCI

Chosen:



#### 4)Creation of Travel Approval:

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Click the "Gear" icon and select "Setup" to access the Salesforce Setup menu.

Step 3: Decide whether to use an existing standard object or create a custom object for "Travel Approvals."

If creating a custom object, follow the previous steps mentioned for creating a custom object.

Step 4: In the object's details, go to the "Fields & Relationships" section and click "New Custom Field."

Define the custom field for "Travel Approval" with an appropriate data type.

Step 5: Name the field as "Travel Approval."

Configure any additional field attributes such as default value or help text.

Step 6: Define field-level security settings to control who can view and edit the "Travel Approval" field.

Step 7: Edit the page layout for the object and add the "Travel Approval" field to the layout to make it visible when viewing or editing records.

Step 8: When a travel approval is granted, update the "Travel Approval" field on the corresponding record to indicate the approval status or approval date.

Step 9: Automate Actions (Optional).

Step 10: Thoroughly test the "Travel Approval" process to ensure it meets your requirements. Once tested, deploy the process for use by all users.

The screenshot shows the Salesforce Setup interface for the 'Travel Approval' object. The browser address bar displays a URL from 'smartbridge-fa-dev-ed.develop.lightning.force.com'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Travel Approval' and contains a 'Custom Object Definition Edit' form. This form includes sections for 'Custom Object Information' and 'Custom Object Definition Edit'. The 'Custom Object Information' section has fields for 'Label' (Travel Approval), 'Plural Label' (Travel Approvals), and 'Object Name' (Travel\_Approval). The 'Custom Object Definition Edit' section has a 'Description' field. At the bottom, there are links for 'Context-Sensitive Help Settings' and 'Open the standard Salesforce.com Help & Training window'.



knowledge@futuretech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page/address=52f044%2F%2F%2F%2FQUICK\_CREATE...

Search Setup

Setup Home Object Manager

Q: process

Feature Settings

Marketing

Lead Processes

Sales

Sales Processes

Service

Entitlement Management

Entitlement Processes

Support Processes

Process Automation

Approval Processes

Automation Home (Beta)

Rules

Migrate to Flow

Next Best Action

Paused And Failed Flow Intervent

Post Templates

## Approval Processes

Name: Travel Approval Request

Unique Name: Travel\_Approval\_Request

Approval Assignment Email Template:

Add the fields for Approval action and Approval history visible for all Travel Approval page layouts

Specify Entry Criteria

Use this Approval process if the following criteria are met

Field	Operator	Value	AND
Travel Approval Total Expenses	greater than	5	AND
None	None		AND
None	None		AND
None	None		AND

Select Approver

Using the actions below, specify the user to whom the approval request should be assigned

☐ Let the submitter choose the approver manually

☒ Automatically assign an approver using a standard or custom hierarchy field: Manager

☐ Automatically assign to Queue

knowledge@futuretech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page/address=52f044%2F%2F%2F%2Fprocess%2FProcessNodeWork...

Search Setup

Setup Home Object Manager

Q: process

Feature Settings

Marketing

Lead Processes

Sales

Sales Processes

Service

Entitlement Management

Entitlement Processes

Support Processes

Process Automation

Approval Processes

Automation Home (Beta)

Rules

Migrate to Flow

Next Best Action

Paused And Failed Flow Intervent

Post Templates

## Approval Processes

Step 1 of 3

Step 1. Enter Name and Description

Enter a name, description, and step number for your new approval step.

Previous Approval Step Information

Step Number	Name	Criteria	Assign To
1	Step 1		Manager

Enter Name and Description

Approval Process Name: Travel Approval Request

Name: Travel Coordinator Approval

Unique Name: Travel\_Coordinator\_Approval

Description:

Step Number: 2

Next Cancel

smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000003ghw:FieldsAndRelationships/00H5j000004Cz7/view

Search Setup

Setup Home Object Manager

SETUP + OBJECT MANAGER  
Travel Approval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Edit Travel Approval Custom Field  
Destination state

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label Destination state Date Type Text

Field Name Destination\_state

Description

Help Text

Data Owner User

Field Usage None

Date Accessibility Level None

Compliance Categorization

Available

PII  
HIPAA  
GDPR  
PCI

Chosen

smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000003ghw:FieldsAndRelationships/00H5j000004Cz7/new

Search Setup

Setup Home Object Manager

SETUP + OBJECT MANAGER  
Travel Approval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Travel Approval Custom Field  
Destination state

Back to Travel Approval

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label Destination state Object Name Travel Approval

Field Name Destination\_state Date Type Text

API Name Destination\_state\_\_c

Description

Help Text

Data Owner

Field Usage

Date Accessibility Level

Compliance Categorization

Created By GAYATHRI SUBRAMANIAM 11/10/2023, 12:50 pm

Modified By GAYATHRI SUBRAMANIAM 11/10/2023, 12:50 pm

General Options

Required

Unique

Case Sensitive

smartbridge-fa-dev-01.dev.lightning.force.com/lightning/setup/ObjectManager/0115000003qHsFieldsAndRelationships/00H5000005ACy0-will

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Travel Approval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Edit Travel Approval Custom Field

Purpose of trip

Help for this Page

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label Purpose of trip Data Type Text

Field Name Purpose\_of\_trip

Description

Help Text

Date Owner User

Field Usage None

Date Security Level None

Compliance Categorization

Available

PI

HIPAA

GDPR

PII

Chosen

smartbridge-fa-dev-01.dev.lightning.force.com/lightning/setup/ObjectManager/0115000003qHsFieldsAndRelationships/00H5000005ACy0-view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Travel Approval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Travel Approval Custom Field

Purpose of trip

Help for this Page

Back to Travel Approval

Validation Rules (0)

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label Purpose of trip Object Name Travel Approval

Field Name Purpose\_of\_trip Data Type Text

API Name Purpose\_of\_trip\_\_c

Description

Help Text

Date Owner

Field Usage

Date Security Level

Compliance Categorization

Created By SAIVATHI SUBRAMAN 17/10/2023, 12:31 pm

Modified By SAIVATHI SUBRAMAN 17/10/2023, 12:31 pm

General Options

Required

Unique

Case Sensitive

smartbridge-14-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015000003ghN45-wildAndRecklessDps/0015000000Kcy-wat

Search Setup

Setup Home Object Manager

SETUP + OBJECT MANAGER

Travel Approval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Edit Travel Approval Custom Field

Trip start date

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label: Trip start date Date Type: Date

Field Name: Trip\_start\_date

Description:

Help Text:

Date Owner: User

Field Usage: -None-

Date Security Level: -None-

Compliance Categorization

Available: PI, HIPAA, GDPR, PCI

Chosen:

smartbridge-14-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015000003ghN45-wildAndRecklessDps/0015000000Kcy-wat

Search Setup

Setup Home Object Manager

SETUP + OBJECT MANAGER

Travel Approval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Travel Approval Custom Field

Trip start date

Back to Travel Approval

Custom Field Definition Detail

Edit Set Field Level Security View Field Accessibility Where is this used?

Field Information

Field Label: Trip start date Object Name: TravelApproval

Field Name: Trip\_start\_date Date Type: Date

API Name: Trip\_start\_date\_\_c

Description:

Help Text:

Date Owner:

Field Usage:

Date Security Level:

Compliance Categorization:

Created By: GAYATHRI SUBRAMANIAM 17/10/2023, 12:52 pm

Modified By: GAYATHRI SUBRAMANIAM 17/10/2023, 12:52 pm

General Options

Required: ☐

Default Value:

smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015000003qNA/FieldsAndRelationships/00N50000034C/view

Search Setup

Setup Home Object Manager

### SETUP & OBJECT MANAGER

## Travel Approval

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Edit Travel Approval Custom Field

### Trip End date

Help for this Page

#### Custom Field Definition Edit

Change Field Type Save Cancel

**Field Information**

Field Label: Trip End date Date Type: Date

Field Name: Trip\_End\_date

Description:

Help Text:

Store Owner: User

Field Usage: None

Date Accessibility Level: None

Compliance Categorization:

Available: PB, HIPAA, GDPR, PCI

Chosen:

smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015000003qNA/FieldsAndRelationships/00N50000034C/view

Search Setup

Setup Home Object Manager

### SETUP & OBJECT MANAGER

## Travel Approval

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Travel Approval Custom Field

### Trip End date

Back to Travel Approval

Validation Rules

#### Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

**Field Information**

Field Label	Trip End date	Object Name	Travel Approval		
Field Name	Trip_End_date	Date Type	Date		
API Name	Trip_End_date__c				
Description					
Help Text					
Date Owner					
Field Usage					
Date Accessibility Level					
Compliance Categorization					
Created By	GAYATHRI SUBRAMAN	15/10/2023, 12:32 pm	Modified By	GAYATHRI SUBRAMAN	15/10/2023, 12:32 pm

**General Options**

Required: ☐

Default Value:

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000003j9fcs/FIELDSAndRelationships/00N5j00000XKc7/view

Search Setup

Setup Home Object Manager

SETUP + OBJECT MANAGER  
Travel Approval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Edit Travel Approval Custom Field  
Status

Custom Field Definition Edit

Change Field Type | Provide to Global Value Set | Save | Cancel

Field Information

Field Label: Status

Field Name: Status

Description:

Help Text:

Date Owner: User

Field Usage: -None-

Date Security Level: -None-

Compliance Categorization

Available: PI, HIPAA, GDPR, etc.

Chosen:

Help for this Page

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000003j9fcs/FIELDSAndRelationships/00N5j00000XKc7/view

Search Setup

Setup Home Object Manager

SETUP + OBJECT MANAGER  
Travel Approval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Travel Approval Custom Field  
Status

Back to Travel Approval

Validation Rules (0)

Custom Field Definition Detail

Field Information

Field Label	Status	Object Name	TravelApproval
Field Name	Status	Date Type	Picklist
API Name	Status__c		
Description			
Help Text			
Date Owner			
Field Usage			
Date Security Level			
Compliance Categorization			
Created By	GAJATHIR SURRAMAN	Created	11/10/2023, 12:35 pm
Modified By	GAJATHIR SURRAMAN	Modified	11/10/2023, 12:35 pm

General Options

Required: ☐

Default Value:

## **Tabs:**

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

- 1.**Standard Object Tabs:** Standard object tabs display data related to standard objects.
- 2.**Custom Object Tabs:** Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.
- 3.**Web Tabs:** Web Tabs display any external Web-based application or Web page in a Salesforce tab.
- 4.**Visualforce Tabs:** Visualforce Tabs display data from a Visualforce Page.

### **1)Creation of Employee Details**

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Access Setup from the "Gear" icon.

Step 3: In Setup, find "User Interface" and select "Tabs."

Step 4: Click "New Custom Object Tab."



Step 5: Choose the "Employee Detail" object and label it as "Employee Details."

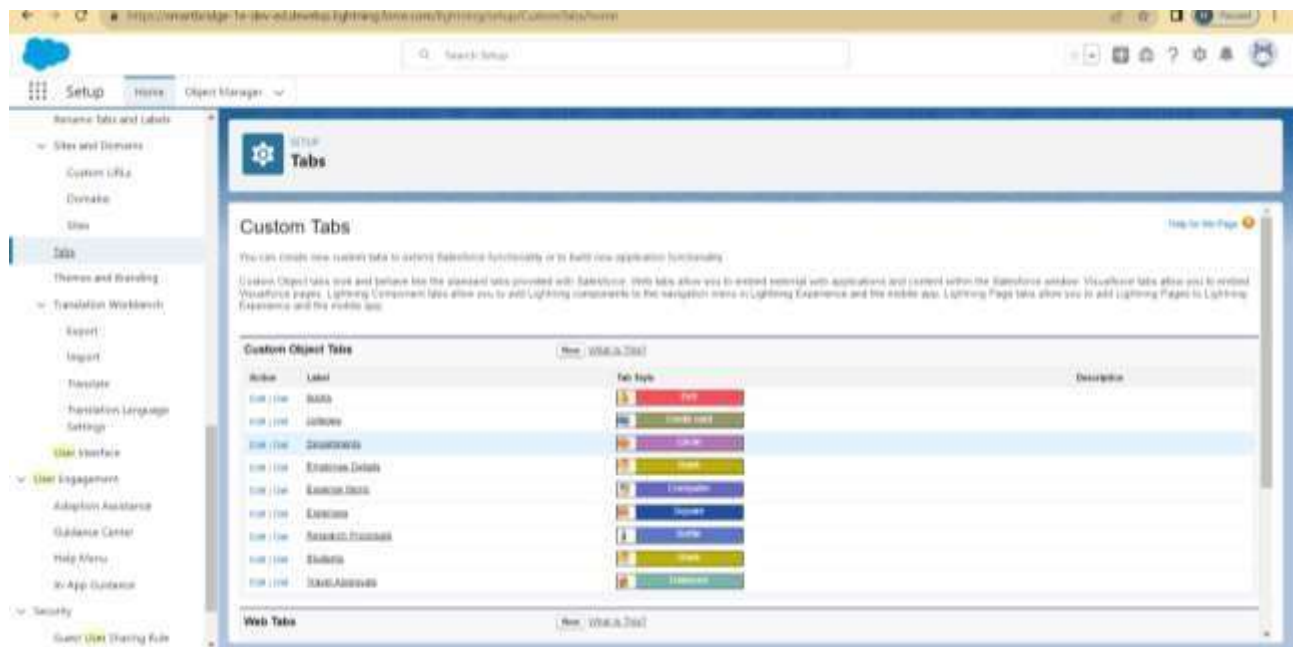
Step 6: Configure tab appearance, accessibility, and styling.

Step 7: Save the tab.

Step 8: Arrange the tab's order in "App Manager."

Step 9: Assign the tab to relevant user profiles in the "Profiles" section of Setup.

Step 10: Test the tab and deploy it for user access.



## 2) Creation of Expenses Tab

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Access Setup from the "Gear" icon.

Step 3: In Setup, go to "Objects and Fields" and select "Object Manager."

Step 4: Create a custom object for "Expenses" if it doesn't already exist. Ensure it has the necessary fields to capture expense information.

Step 5: Go to "User Interface" in Setup and select "Tabs."



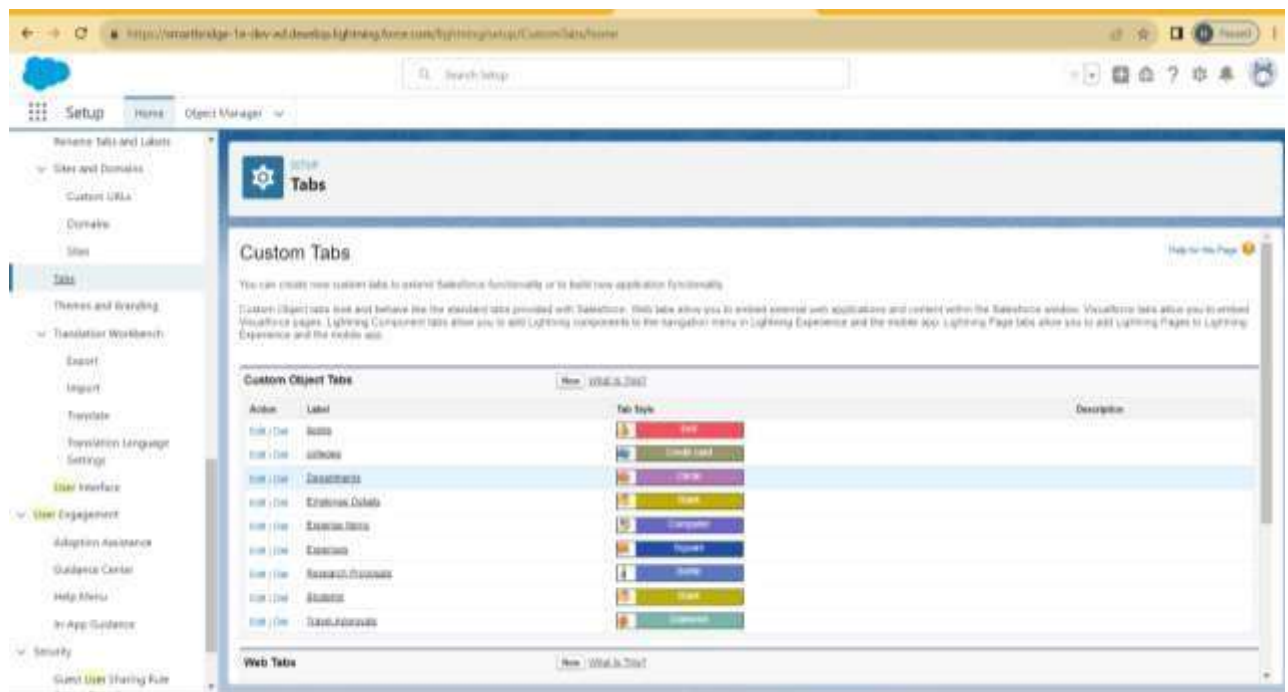
Step 6: Click "New Custom Object Tab."

Step 7: Choose the custom object for "Expenses."

Step 8: Label the tab as "Expenses" and configure its style and color.

Step 9: Save the tab.

Step 10: Arrange the tab's order in your app and assign it to relevant user profiles.



### 3)Creation of Expense Item Tab

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Access Setup from the "Gear" icon.

Step 3: In Setup, go to "Objects and Fields" and select "Object Manager."

Step 4: Create a custom object for "Expense Items" if it doesn't already exist. Ensure it has the necessary fields to capture individual expense item details.

Step 5: Go to "User Interface" in Setup and select "Tabs."

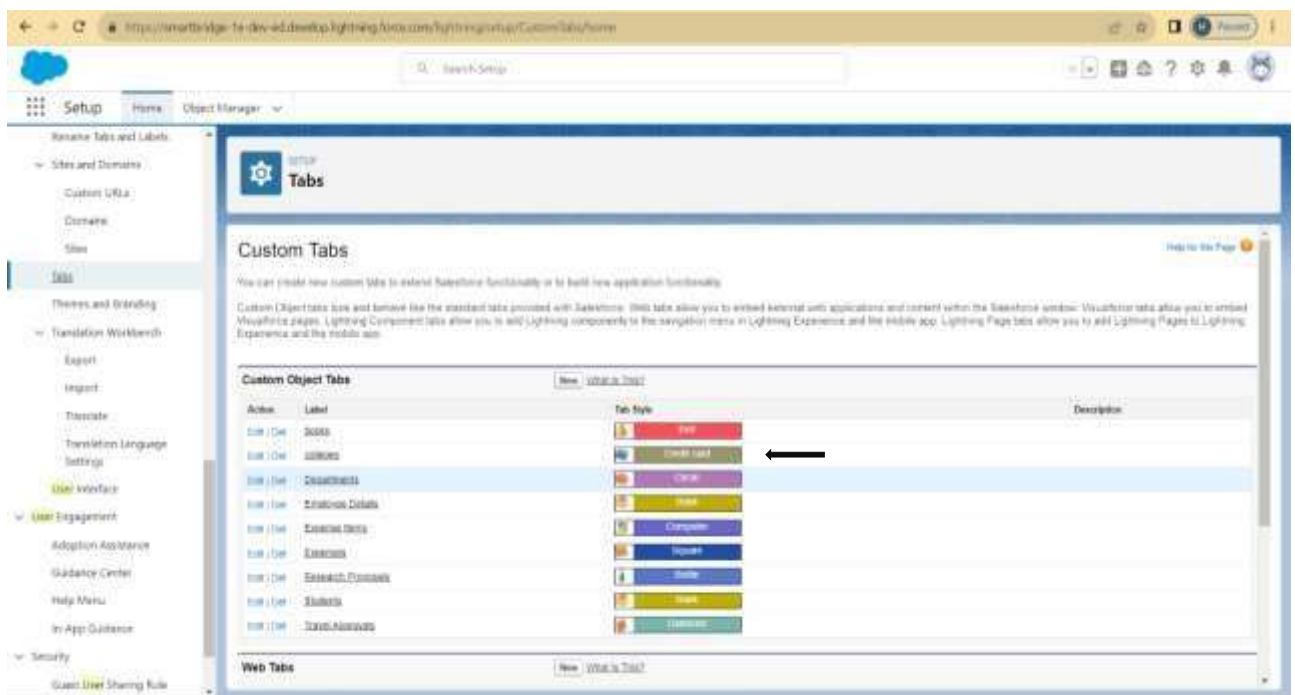
Step 6: Click "New Custom Object Tab."

Step 7: Choose the custom object for "Expense Items."

Step 8: Label the tab as "Expense Items" and configure its style and color.

Step 9: Save the tab.

Step 10: Arrange the tab's order in your app and assign it to relevant user profiles.



#### 4)Creation of Travel Approval Tab

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Access Setup from the "Gear" icon.

Step 3: In Setup, find "User Interface" and select "Tabs." Step

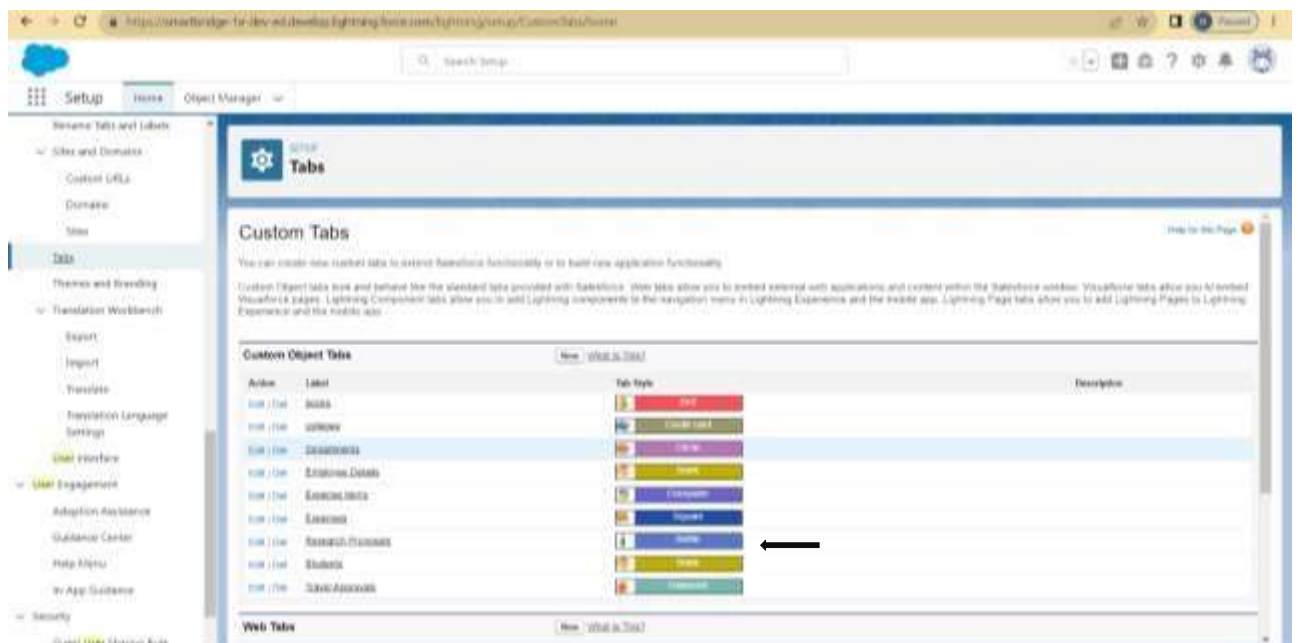
4: Click on the "New Custom Object Tab" button.

Step 5: Choose the object where you track "Travel Approvals"

Step 6: Label the tab as "Travel Approvals" and configure its style and color.

Step 7: Save the tab.

Step 8: Arrange the tab's order in your app and assign it to relevant user profiles.



## Lightning App:

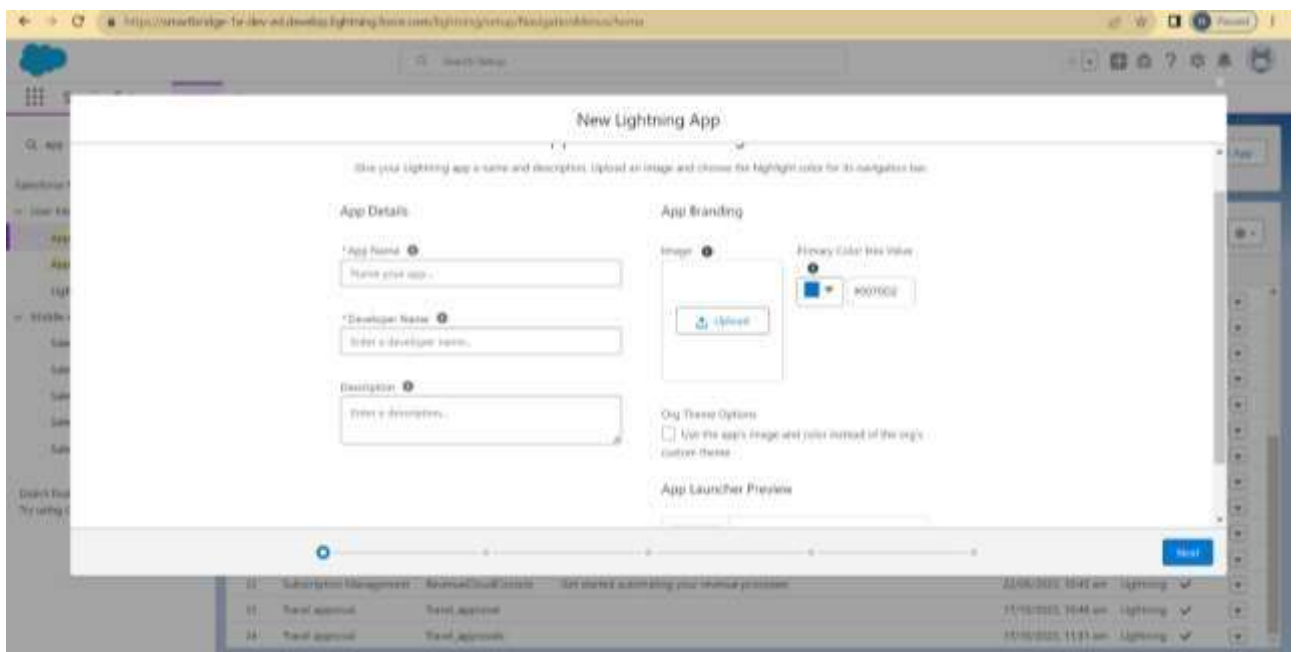
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

**Standard apps:** these apps come with every occurrence of Salesforce as default. Community, Call Centre, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.

**Custom apps:** these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

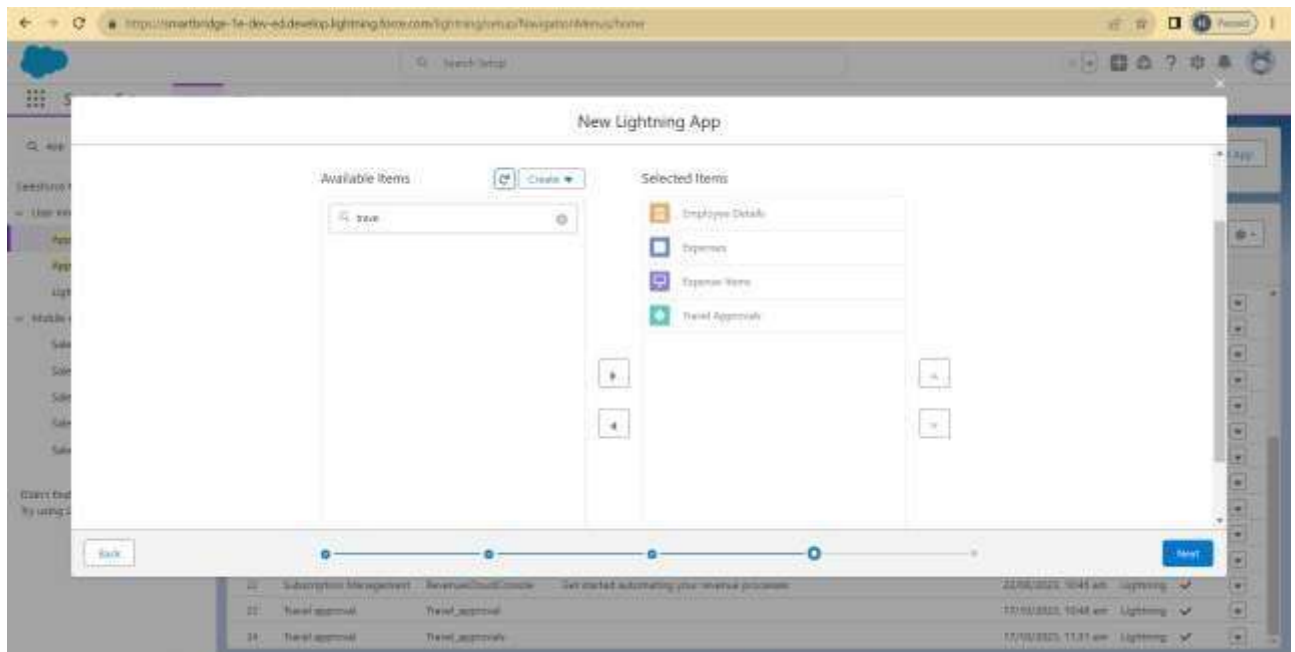
1. Click New Lightning App. Travel approval application as the App Name, then click Next



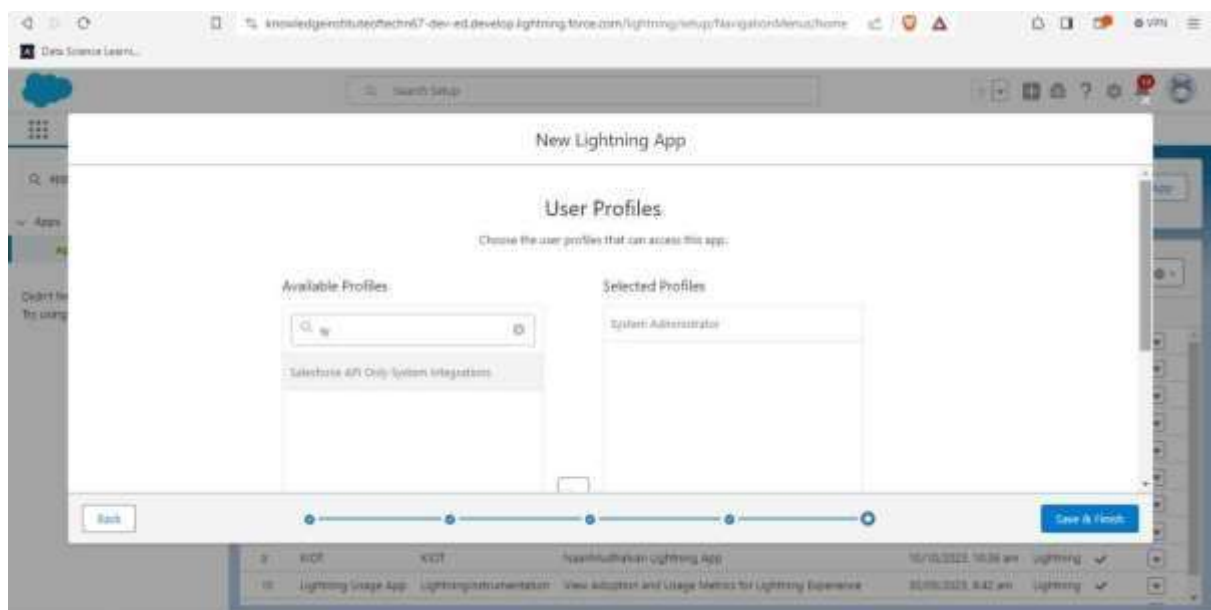
2. Under App Options, leave the default selections and click Next.

3. Under Utility Items, leave as is and click Next.

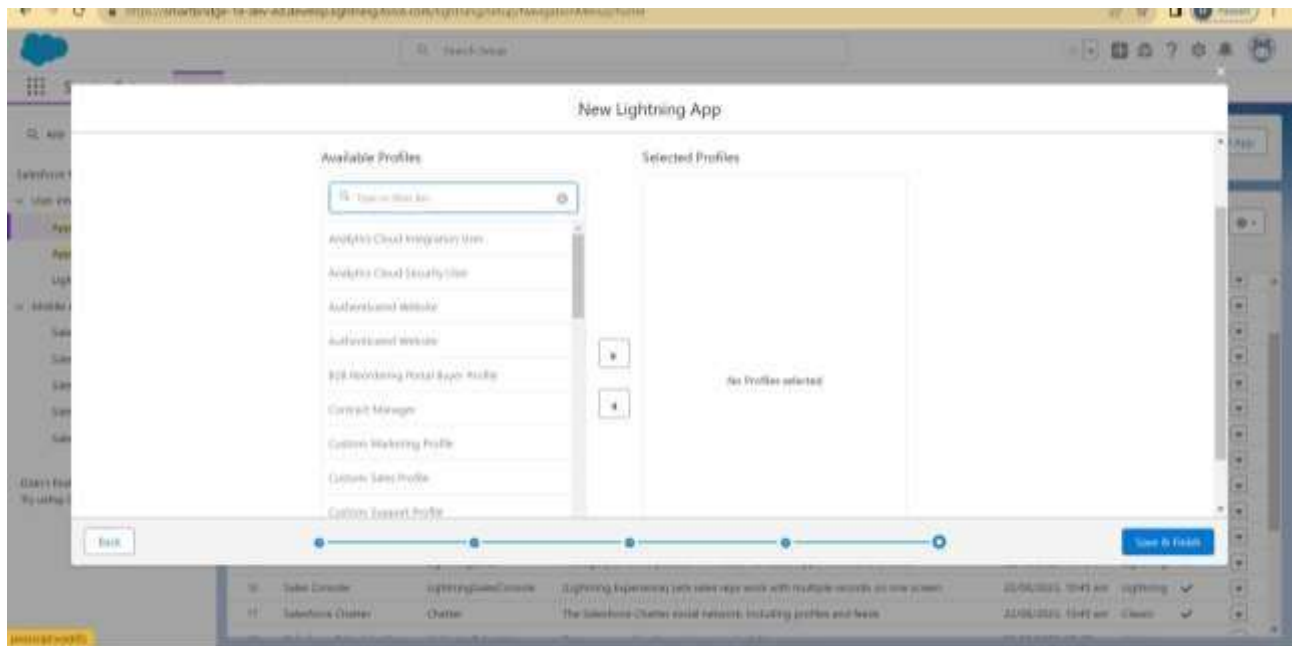
4. From Available Items, select Employee Details, Expense, Expense Items, Travel Approvals and Dashboards and move them to Selected Items. Click Next.



5. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



6. To verify your changes, click the App Launcher, type Job Application and select the Job Application app.



## Fields and Relationship:

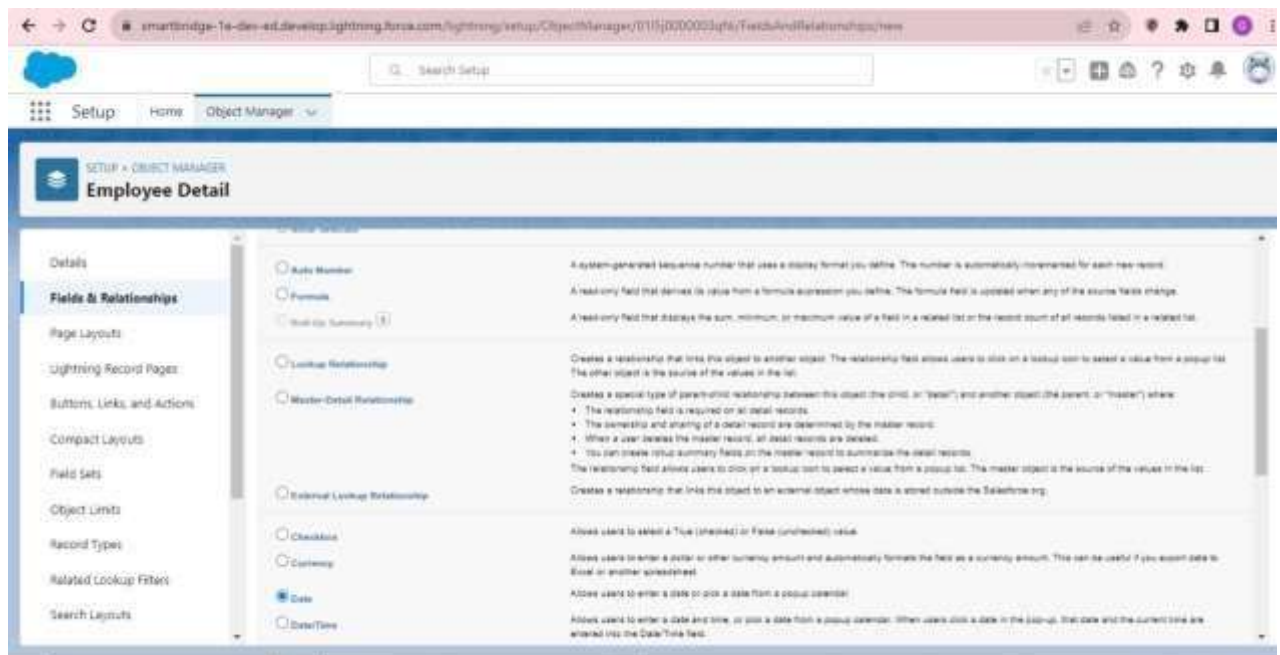
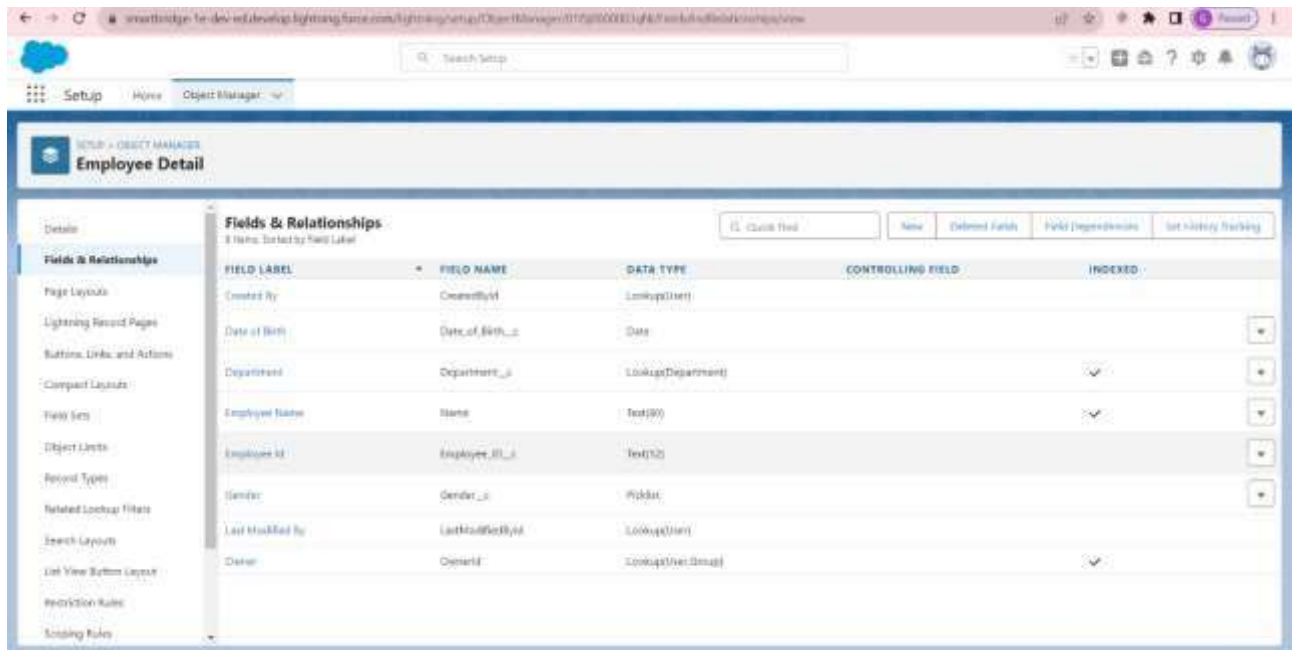
Fields in Salesforce represent what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in salesforce:

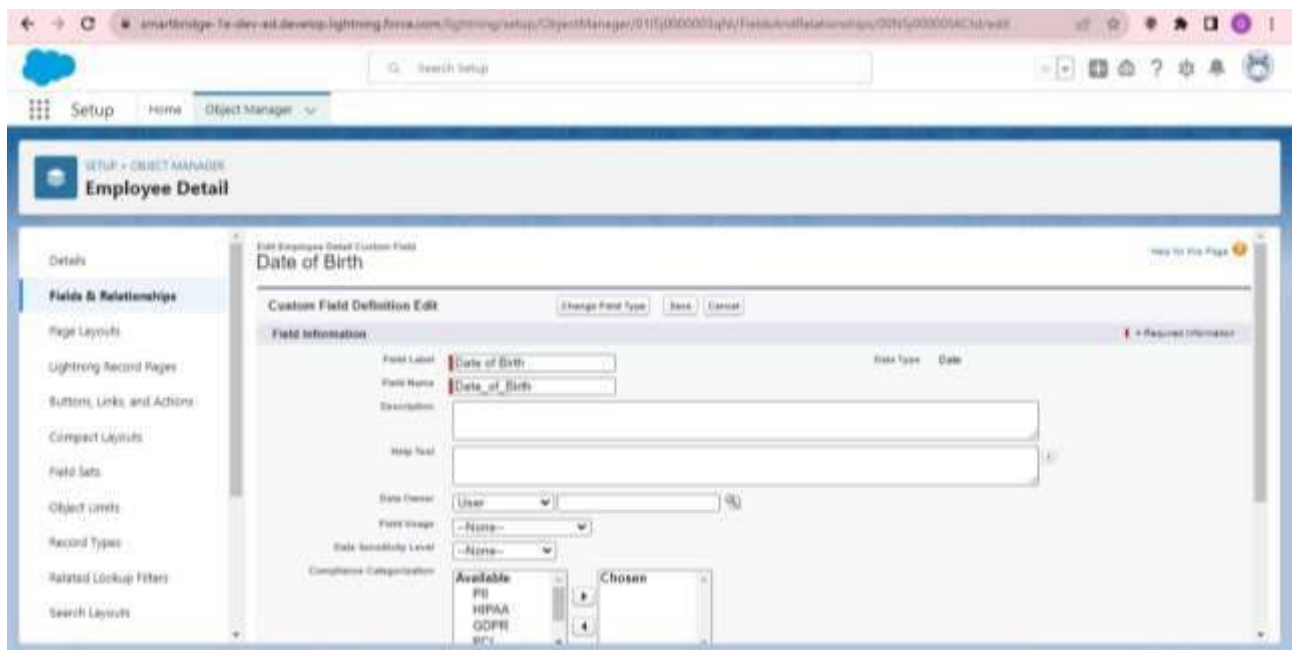
**Standard fields:** There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.

**Custom fields:** The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

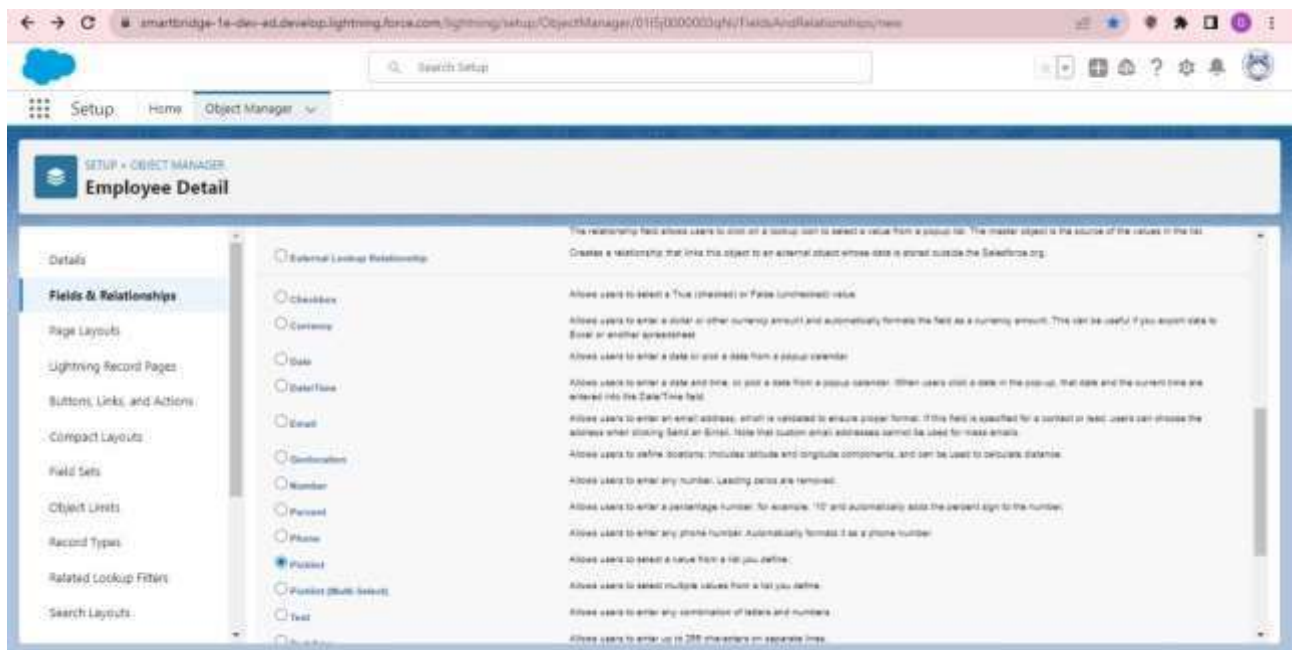
## 1) Creation of Fields for Employee Details Objects





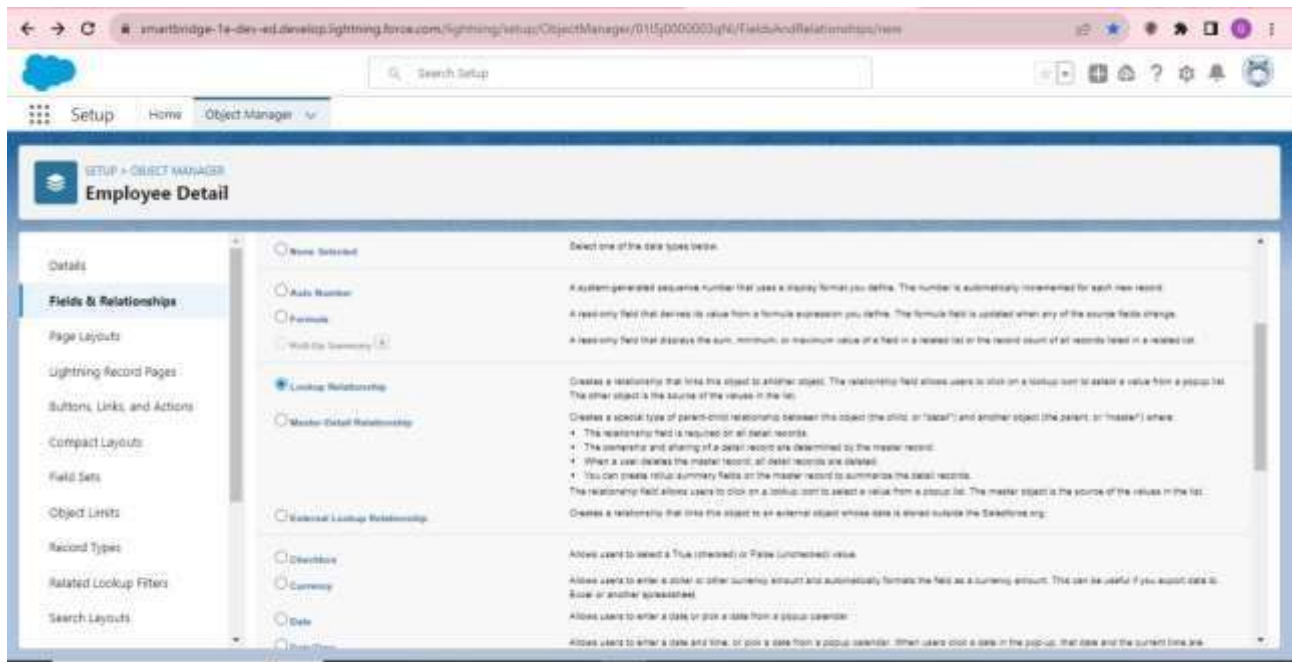


## 2) Picklist for Gender

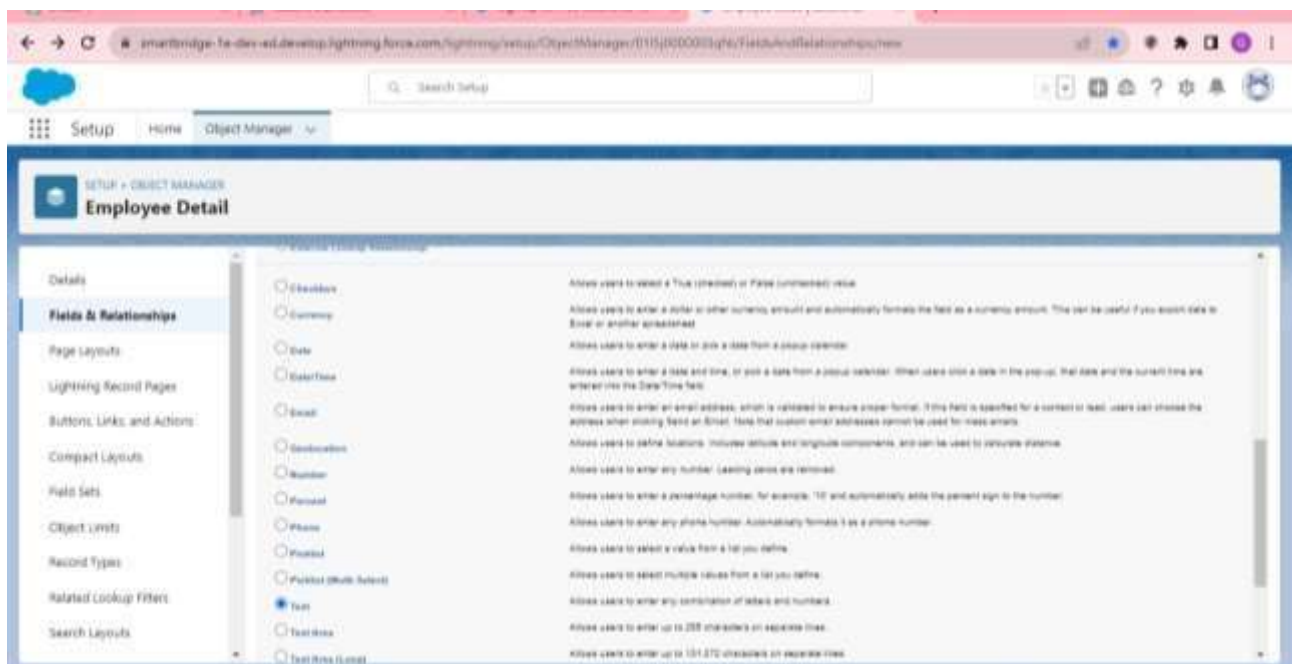




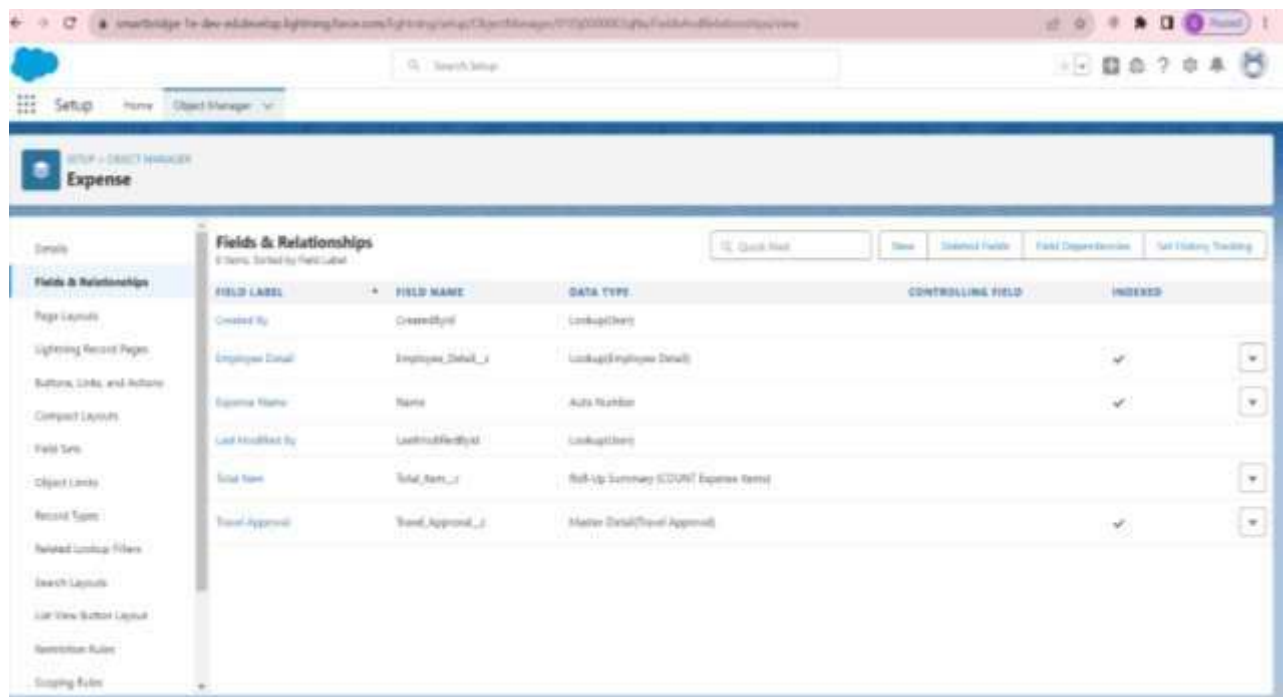
### 3)Lookup Relationship



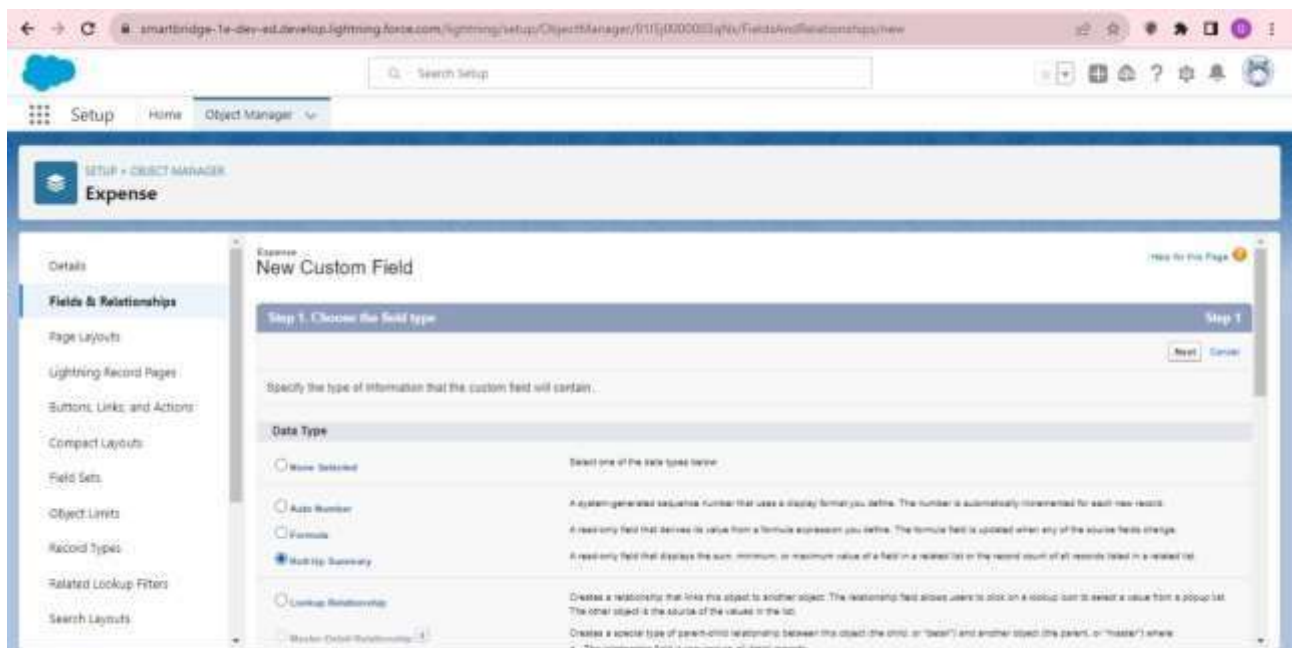
#### 4)Text



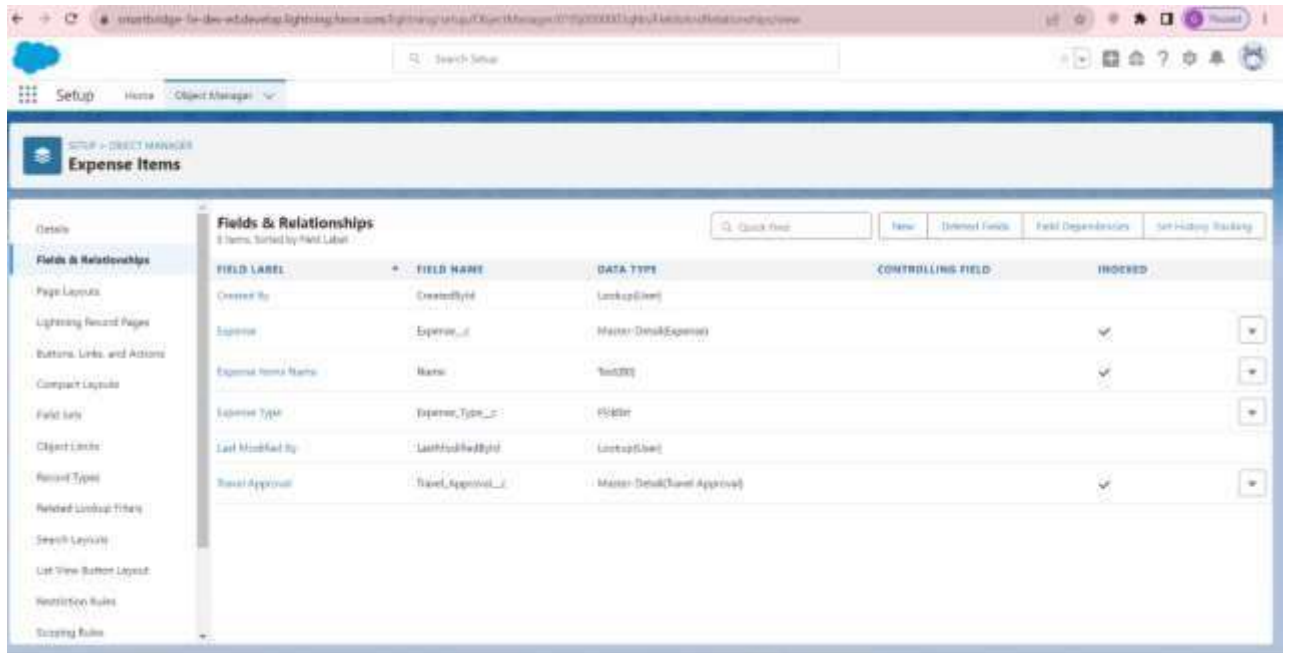
## 5) Creation of Fields for Expense



## 6) Rollup summary



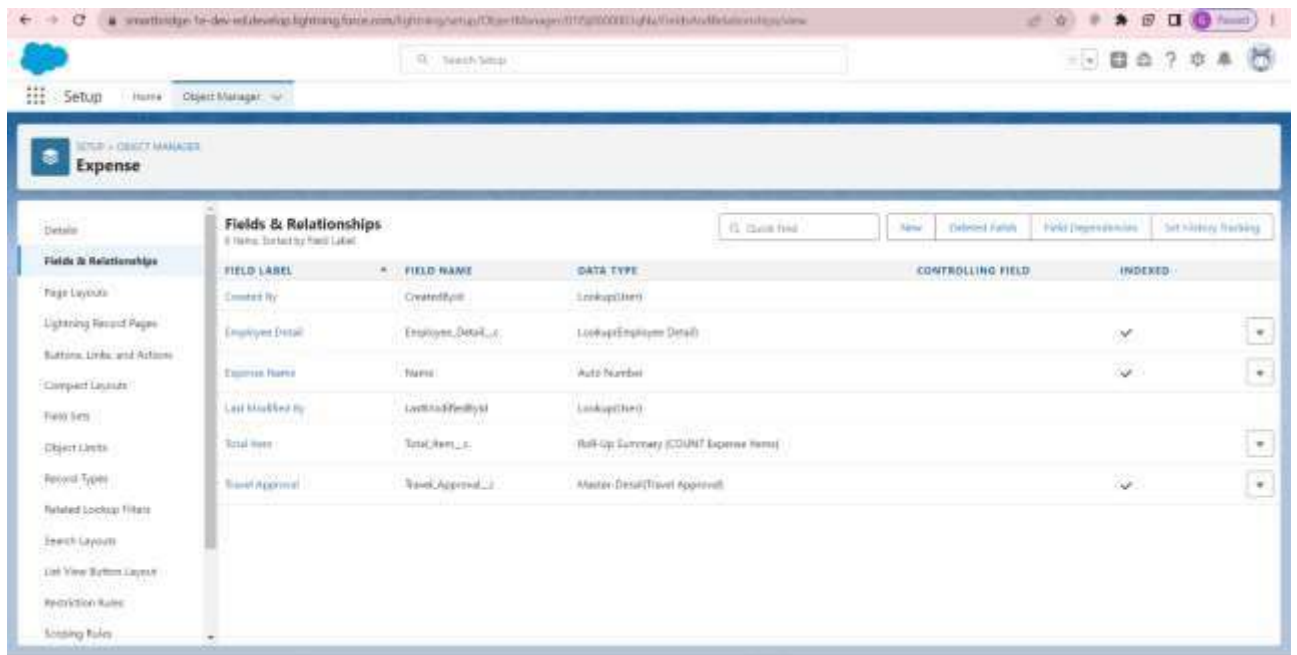
## 7) Creation of Fields Expense Items



The screenshot shows the Salesforce Setup interface for the 'Expense Items' object. The 'Fields & Relationships' tab is selected, displaying a list of 8 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By, Expense, Expense Item Name, Expense Type, Last Modified By, and Travel Approval. The 'Expense' field is highlighted in blue.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Expense	Expense__c	Master-Detail(Expense)		✓
Expense Item Name	Name	Text(255)		✓
Expense Type	Expense_Type__c	Picklist		
Last Modified By	LastModifiedDate	Lookup(User)		
Travel Approval	Travel_Approval__c	Master-Detail(Travel Approval)		✓

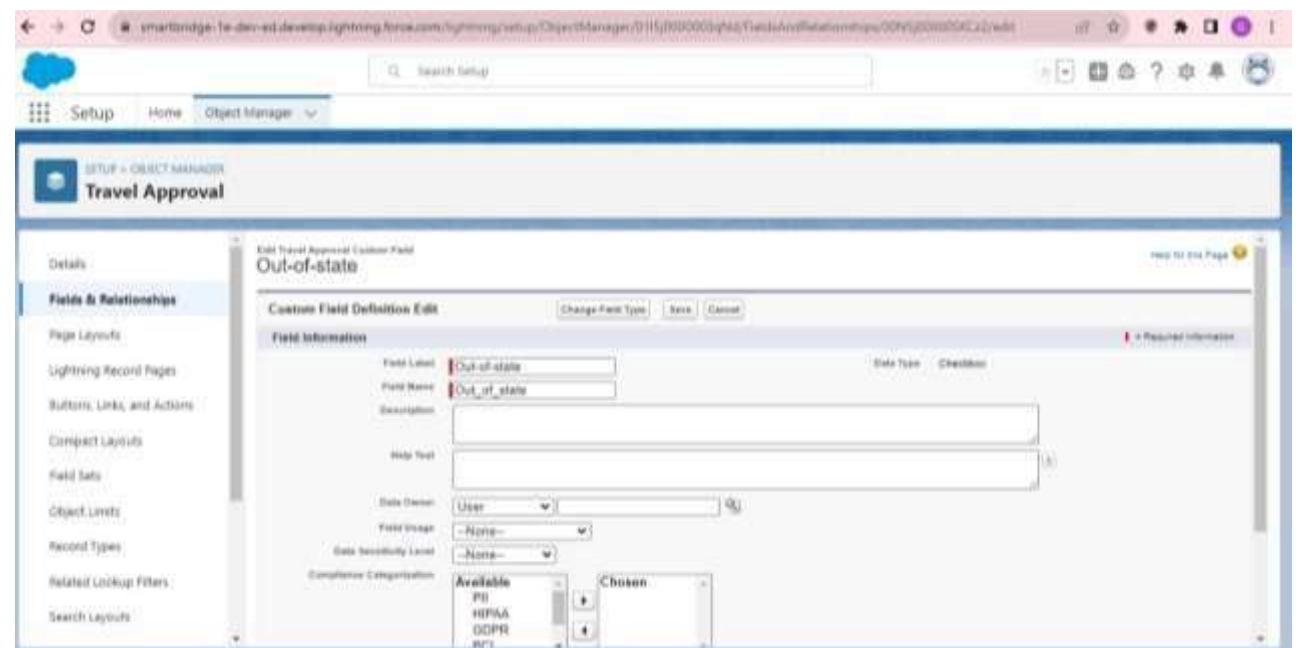
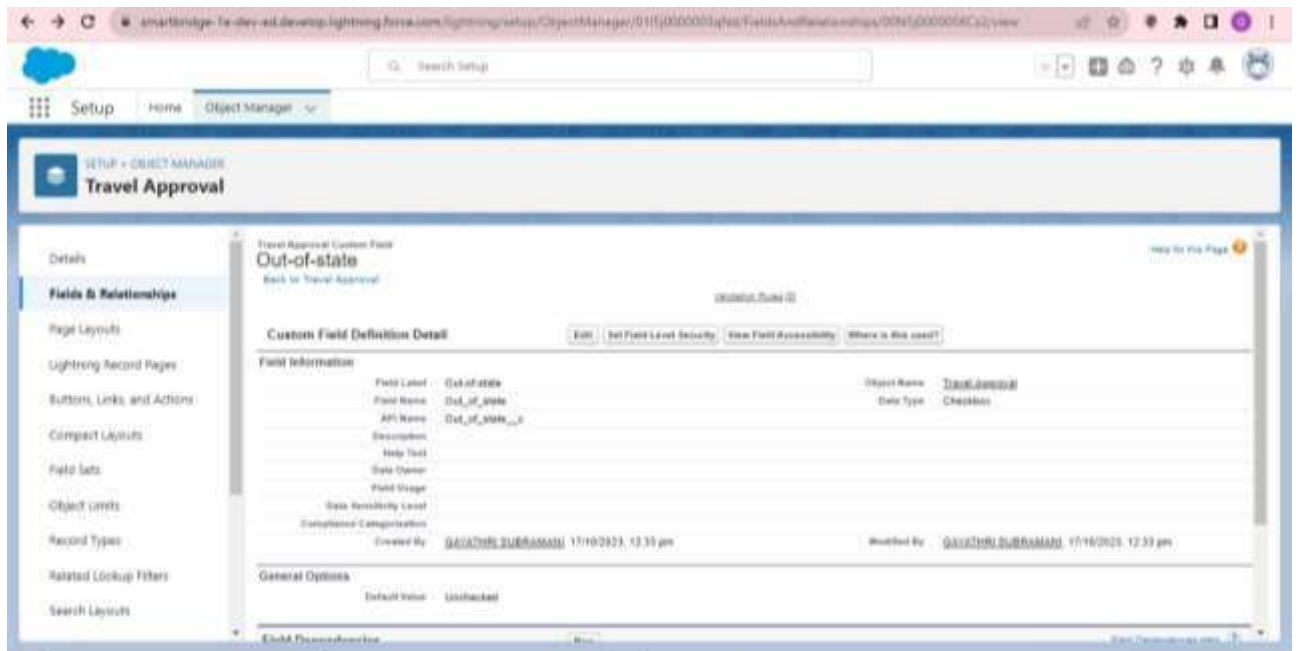
## 8) Creation of Fields Travel Approval



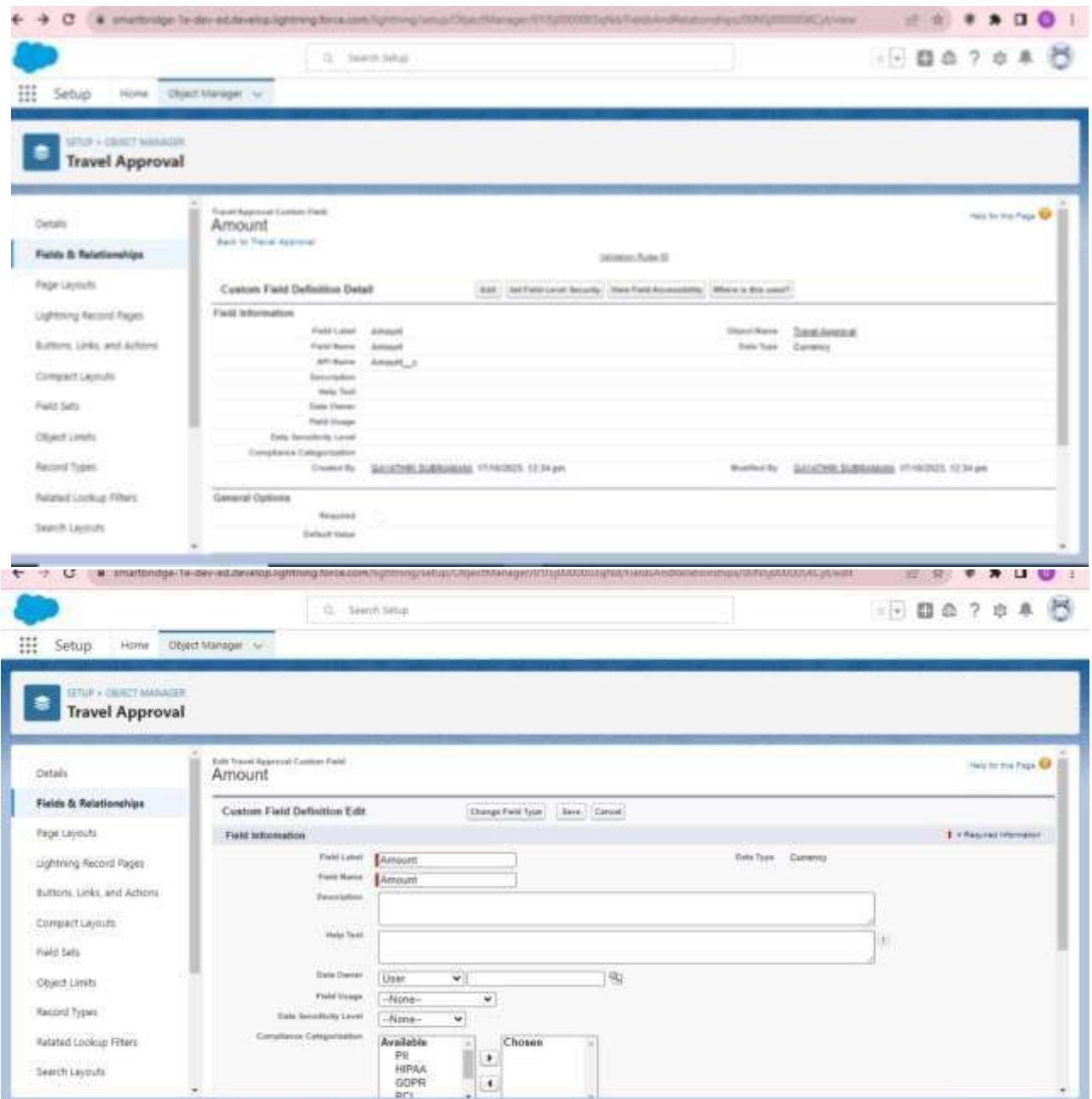
The screenshot shows the Salesforce Setup interface for the 'Travel Approval' object. The 'Fields & Relationships' tab is selected, displaying a list of 8 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By, Employee Detail, Expense Name, Last Modified By, Total Item, and Travel Approval. The 'Travel Approval' field is highlighted in blue.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Employee Detail	Employee_Detail__c	Lookup(Employee Detail)		✓
Expense Name	Name	Auto Number		✓
Last Modified By	LastModifiedDate	Lookup(User)		
Total Item	Total_Item__c	Roll-Up Summary (COUNT Expense Items)		
Travel Approval	Travel_Approval__c	Master-Detail(Travel Approval)		✓

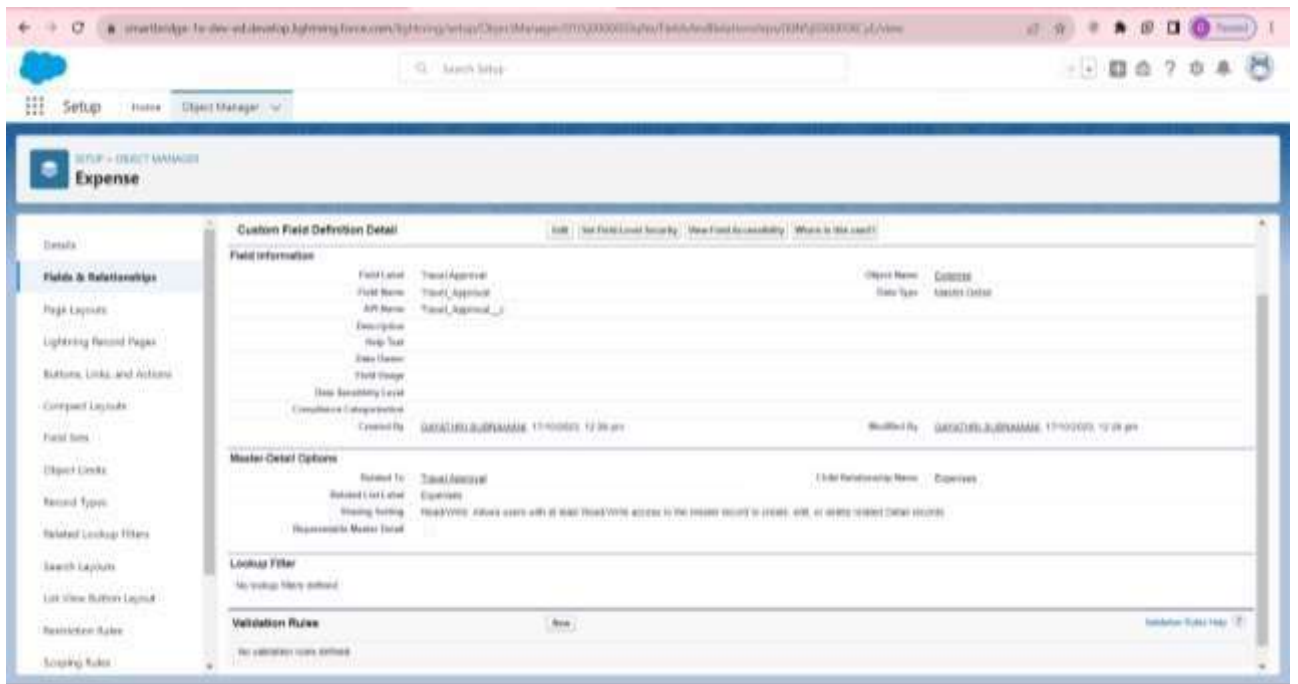
## 9) Fields for Out-of-State



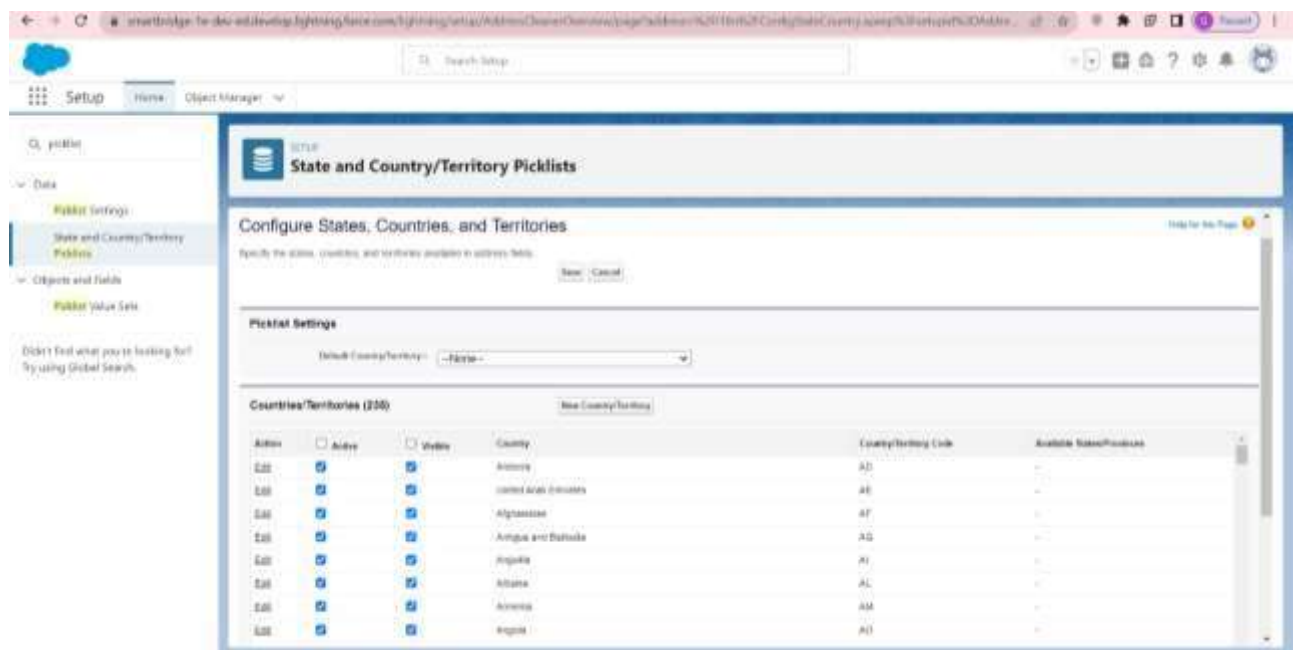
## 10)Fields for Amount



## 11) Master-Detail for Expense



## 12) Picklist for state and country/Territory



## **4.USERS & DATA SECURITY**

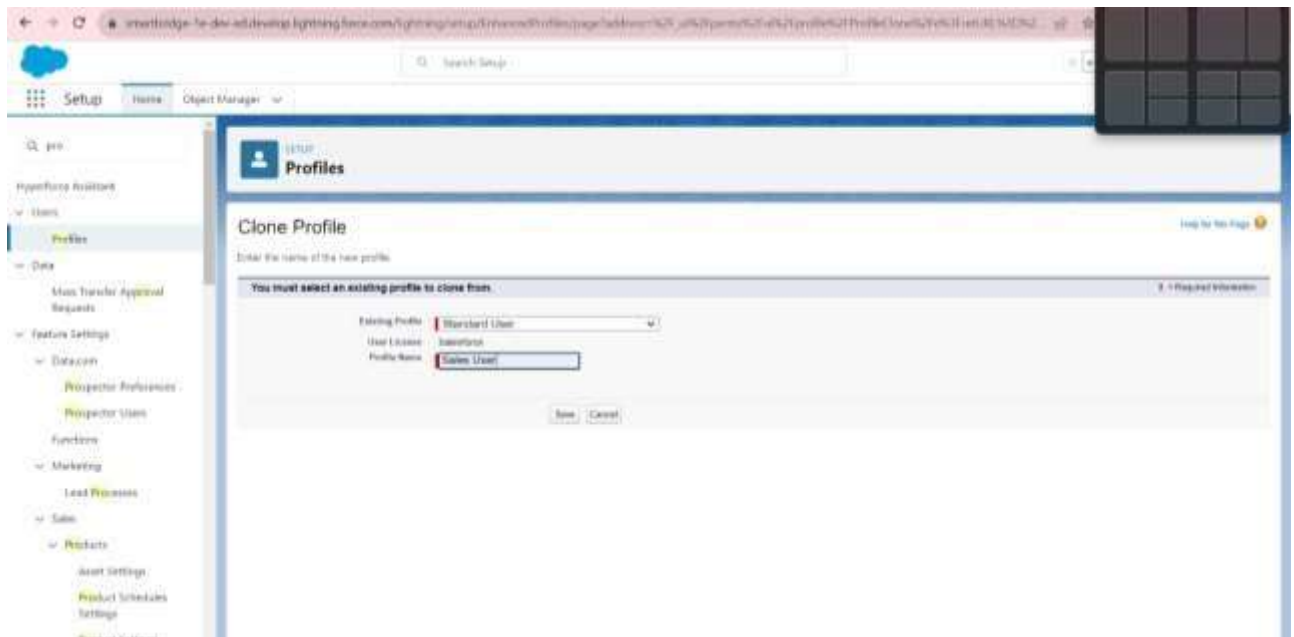
### **Profile**

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A 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. A profile can be assigned to many users, but user can be assigned single profile at a time.

### **1)Create A Custom Profile**

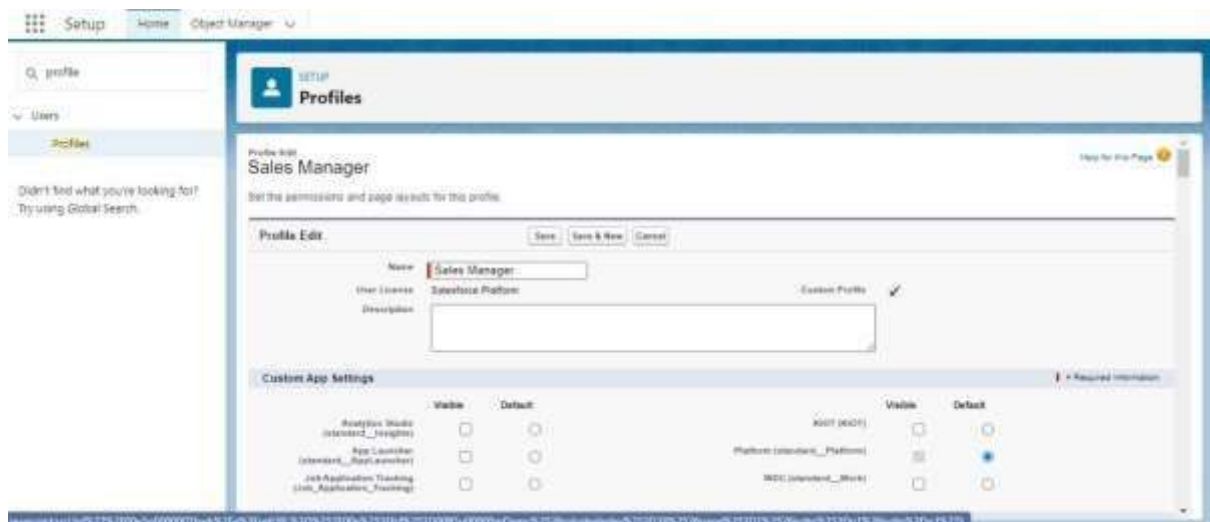
- 1.From setup, enter profiles in Quick Find box
- 2.Select profiles (Standard user).
- 3.Click clone.
- 4.For Profile, enter Sales user.
- 5.Click save.





## 2) Create A Custom Profile-2

1. Create a profile with the profile name as “Sales Manager”.
2. From setup, enter profiles in Quick Find box
3. Select profiles (Standard user).
4. Click clone.



## Role

In Salesforce, roles are used to determine which users have access to certain data and functions within the system. They are also used to define the reporting hierarchy within an organization. Users



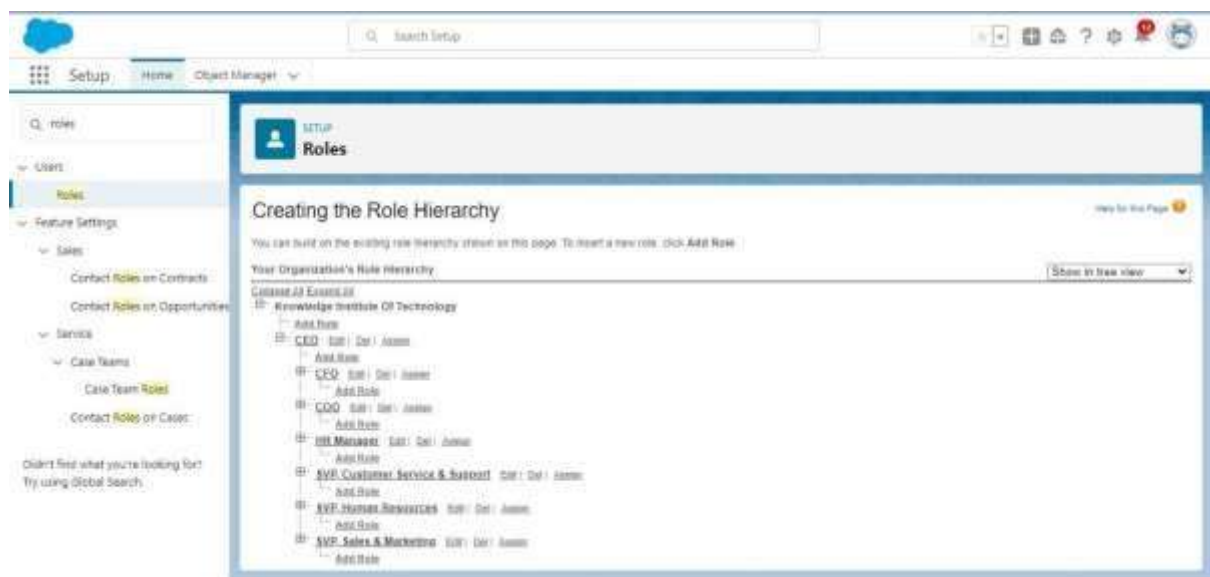
with higher roles have greater access to data and more control over the system

### 1)Creation of Role

1.From the Quick find box search for the role and click on the roles option

2.select the set-up roles option

3.Below the CEO click on add role and enter the label name as a” HR Manager” and role name will be Automatically populated and click on save.



## User

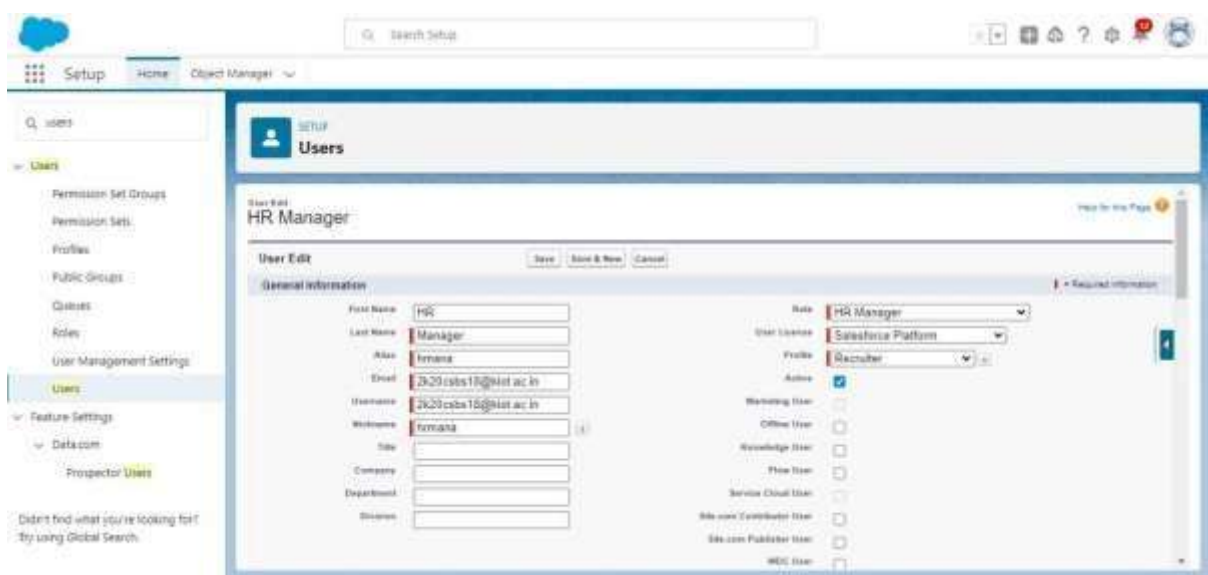
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

### 1)To Create A User

1.From Setup, enter Users in the Quick Find box, then select Users.

2.Click New User.

3. Enter First name as HR and last name as Manager.
4. Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.
5. Then create a new role HR Manager.
6. Select user License as Standard Platform User.
7. Select profile (Sales User)

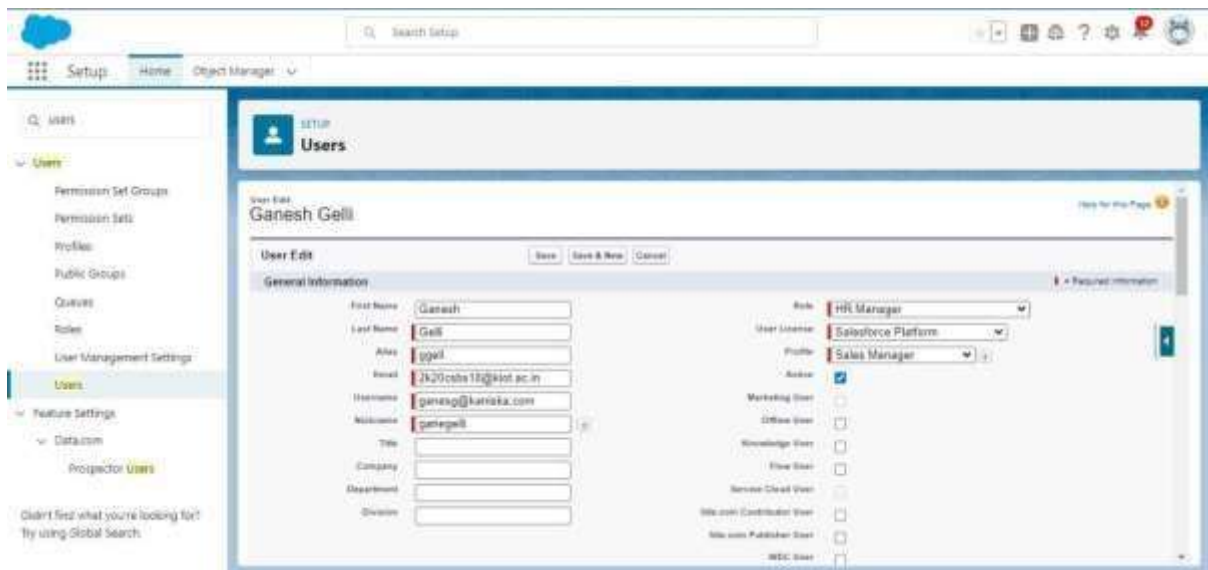


8. Click save

## 2) To Create A User

1. From Setup, enter Users in the Quick Find box, then select Users.
2. Click New User.
3. Enter First name as Ganesh and last name as Gili.
4. Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.
5. Then create a new role HR Manager.
6. Select user License as Standard Platform User.

## 7. Select profile (Sales Manager).



## Sharing Rules

Sharing rules help users to share records based on conditions. It is basically created for objects whose organization-wide defaults (OWD) are set to public read-only or private because sharing rules can only extend the access and not restrict it. Types of sharing rules,

### 1. Owner-based Sharing Rules

### 2. Criteria-based Sharing Rules

## 1) Create A Sharing Rule

1. Go to Sharing Settings, which can be found under the Quick Find section.

2. Scroll down and find the candidate object where a sharing rule needs to be added, and then click on New to create a new sharing rule.

3. Add the label of the sharing rule you want to make.

4. Select your rule type based on the criteria.

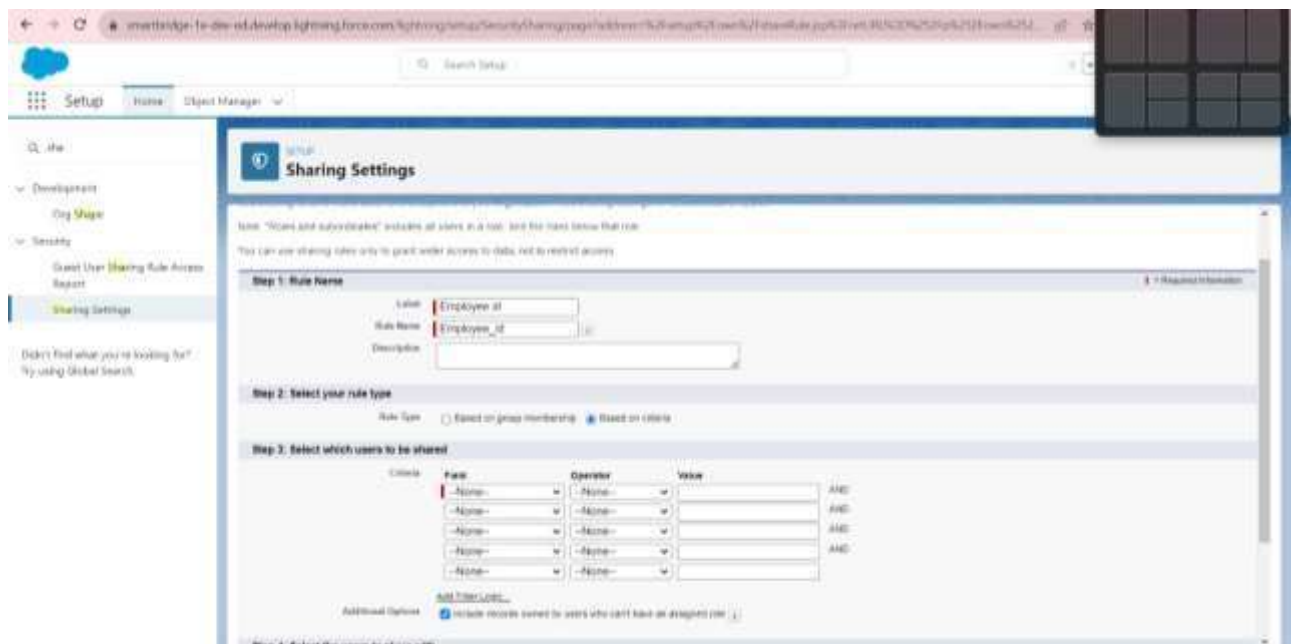
5. Select the field can join immediately check field from the candidate object.

6. Select the State as equal and value is Rajasthan.

7.And in selecting the users to share with the section select roles and in that select Hr Manager.

8.And in the section of select the level of access for the users give the access Read/Write.

9.And save the rule.



The screenshot shows the Salesforce 'Sharing Settings' page for the 'Employee' object. The page is divided into four steps:

- Step 1: Rule Name**
  - Label: Employee of
  - Rule Name: Employee\_of
  - Description:
- Step 2: Select your rule type**
  - Rule Type: ☐ Based on group membership ☒ Based on criteria
- Step 3: Select which users to be shared**

Criteria	Field	Operator	Value	AND/OR
	None	None		AND
	None	None		AND
	None	None		AND
	None	None		AND
	None	None		AND

Additional Options: ☒ Include records owned by users who don't have an assigned role
- Step 4: Select the users to share with**

## 2)Activity 2

Create a Sharing Rule to Share the records of Job Application to Hr Manager with the Access of Read/Write.

### Create A Sharing Rule

1.Go to Sharing Settings, which can be found under the Quick Find section.

2.Scroll down and find the Job Application object where a sharing rule needs to be added, and then click on New to create a new sharing rule.

3.Add the label of the sharing rule you want to make.

4.Select your rule type based on the criteria.

5.Select the field can join immediately check field from the Job Application object.

6.Job application number contains some number.

7.And in selecting the users to share with the section select roles and in that select Hr Manager.

8.And in the section of select the level of access for the users give the access Read/Write.

9.And save the rule.

The screenshot shows the 'Sharing Settings' configuration page in the SAP Security Assistant. The page is divided into four steps:

- Step 1: Rule Name**
  - Label:
  - Rule Name:
  - Description:
- Step 2: Select your rule type**
  - Rule Type: ☐ Based on record owner ☒ Based on criteria
- Step 3: Select which records to be shared**
  - Criteria table:

Field	Operator	Value
Employee id	not equal to	Value / Support User
None	None	
None	None	
None	None	
None	None	
  - Additional Options: ☒ Include records owned by users who don't have an assigned role
- Step 4: Select the users to share with**

# 5.AUTOMATION

## **Flow:**

Flows in Salesforce, a flow is a tool that automates complex business processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows. Flow Builder can be used to build code-like logic without using a programming language. Flows fall into five categories:

- 1.Screen Flows
- 2.Schedule-Triggered Flows
- 3.Autolaunched Flows
- 4.Record-Triggered Flows
- 5.Platform Event-Triggered Flows

### **1)Create A Record Trigger Flow on Job Object**

Step 1: Log in to Salesforce

Step 2: Click on your user icon and select "Setup."

Step 3: In the Setup menu, type "Flows" in the Quick Find box, and then select "Flows" under "Process Automation." Click the "New Flow" button.

Step 4: In the Flow Builder, choose "Record-Triggered Flow" as the flow type. This type of flow is triggered when records are created or updated.

Step 5: Define the object that triggers the flow, in this case, "Employee." Choose whether you want the flow to run when records are created, edited, or both.

Step 6: Use the Flow Builder to add your flow logic. You can use elements like record updates, record lookups, decision elements, and

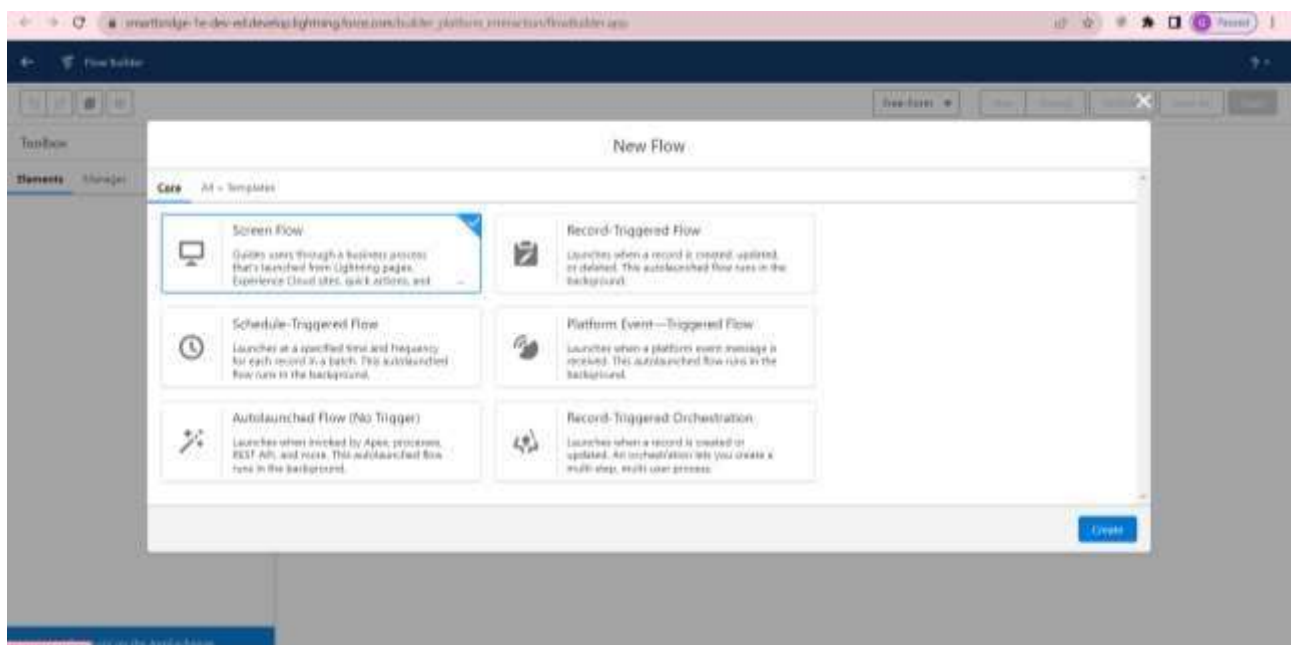
more to define the actions that should occur when a record event is triggered.

Step 7: Define the actions you want the flow to take. For example, you can update related records, send emails, create new records, or execute custom Apex code.

Step 8: Set Flow Variables (Optional)

Step 9: Save the Flow

Step 10: Test the Flow



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Flow Builder

Select Elements

Auto-Layout

Run

Undo

Redo

Save

Start  
Record-Triggered Flow

Object: Employee Detail

Trigger: A record is created

Optimize for: Actions and Related Records

+ Add Scheduled Path (Optional)

Open Flow Trigger Options for Employee De...

Run immediately

End

### Configure Trigger:

**\* Trigger the flow when:**

- ☒ A record is created
- ☐ A record is updated
- ☐ A record is created or updated
- ☐ A record is deleted

### Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow execution helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None

**\* Optimize the flow for:**

#### Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

#### Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

smartbridge-1e-dc-wed-development@thng.here.com/lightningx/Travel\_Approval\_\_c/a081j0000H6G0AA5/view

Travel approval

Departments

Employee Details

Expenses

Expense Items

Travel Approvals

Reports

Dashboards

Travel Approval  
TN08

New Contact

Submit

New Opportunity

Related

Details

Travel Approval Name  
TN08

Employee Detail  
SOW

Department  
CUBS

Destination state  
kerala

Purpose of trip  
Business

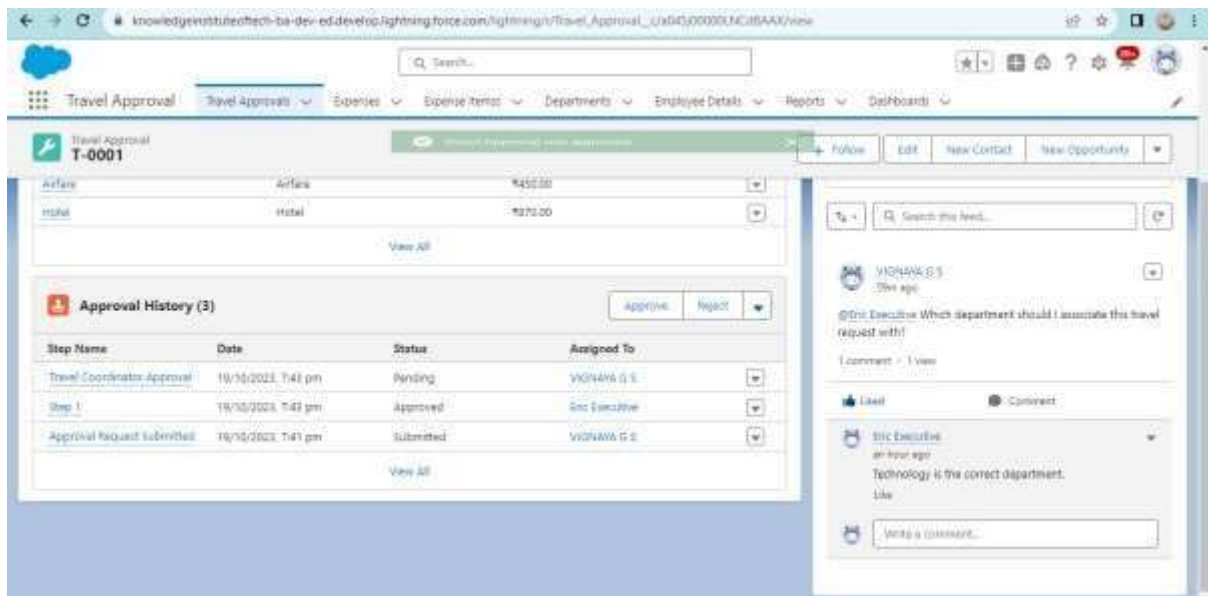
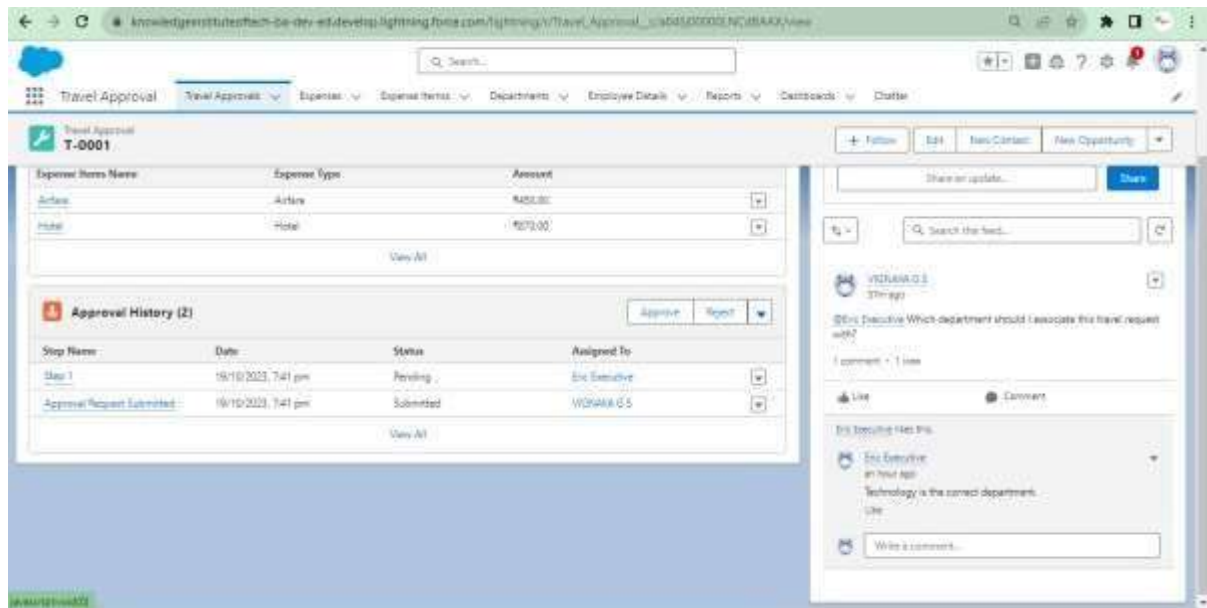
Trip start date  
22/10/2023

Trip End date  
25/10/2023

Out-of-state  
☐

Owner  
GAYATHRI SUBRAMANI





## 2)Create Another Flow

Step 1: Log in to Salesforce

Step 2: Click on your user icon and select "Setup."

Step 3: In the Setup menu, type "Flows" in the Quick Find box, and then select "Flows" under "Process Automation." Click the "New Flow" button.

Step 4: Select the type of flow you want to create based on the specific process or automation you need. You can choose between "Auto launched Flow" or "Screen Flow." Step 5: Design the Flow:

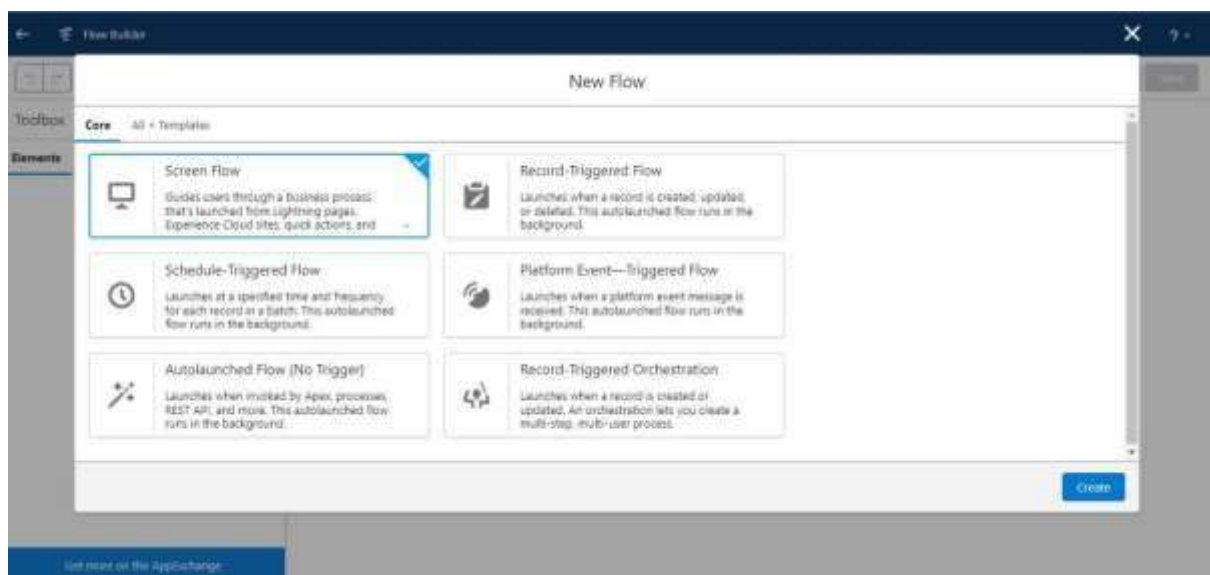
Step 6: Configure Flow Logic

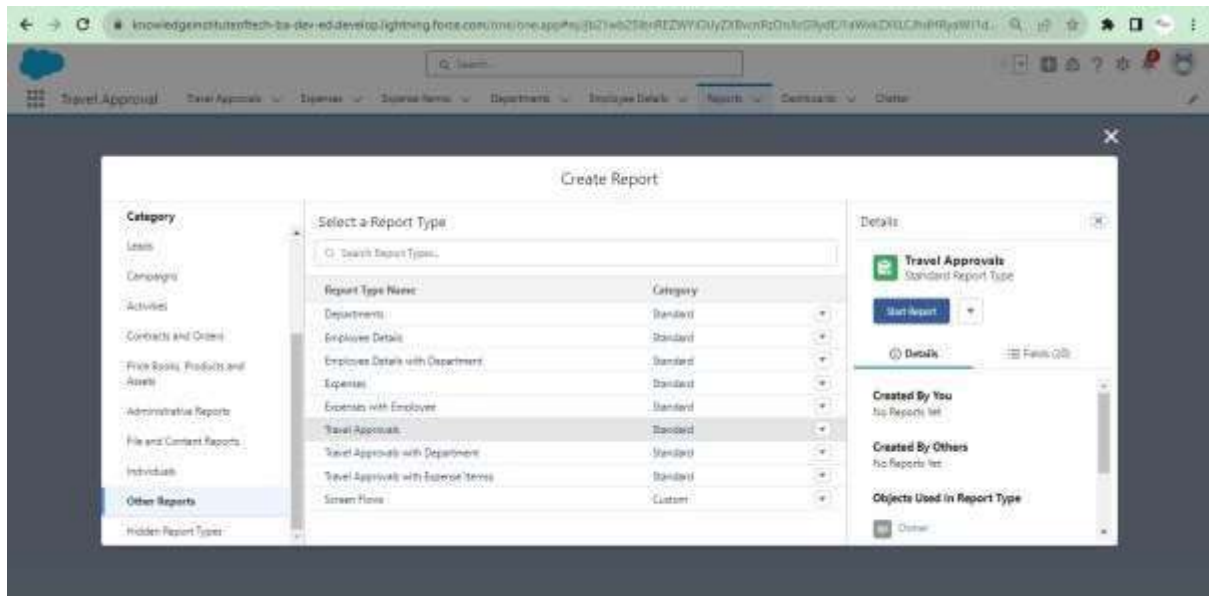
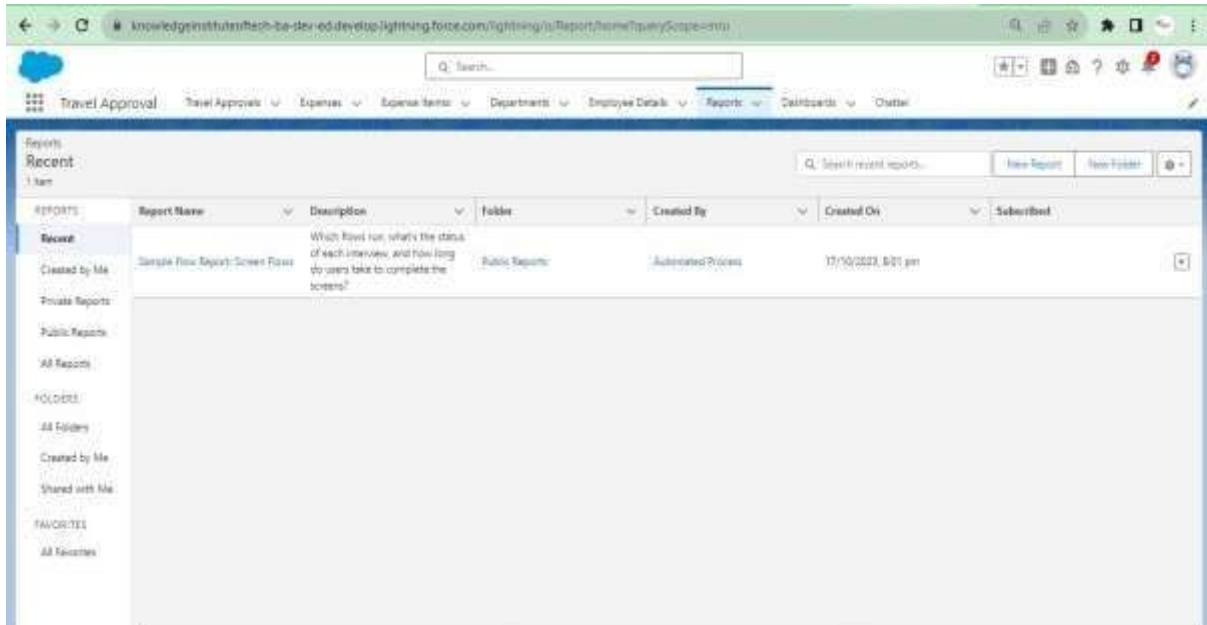
Step 7: Set Flow Variables (Optional)

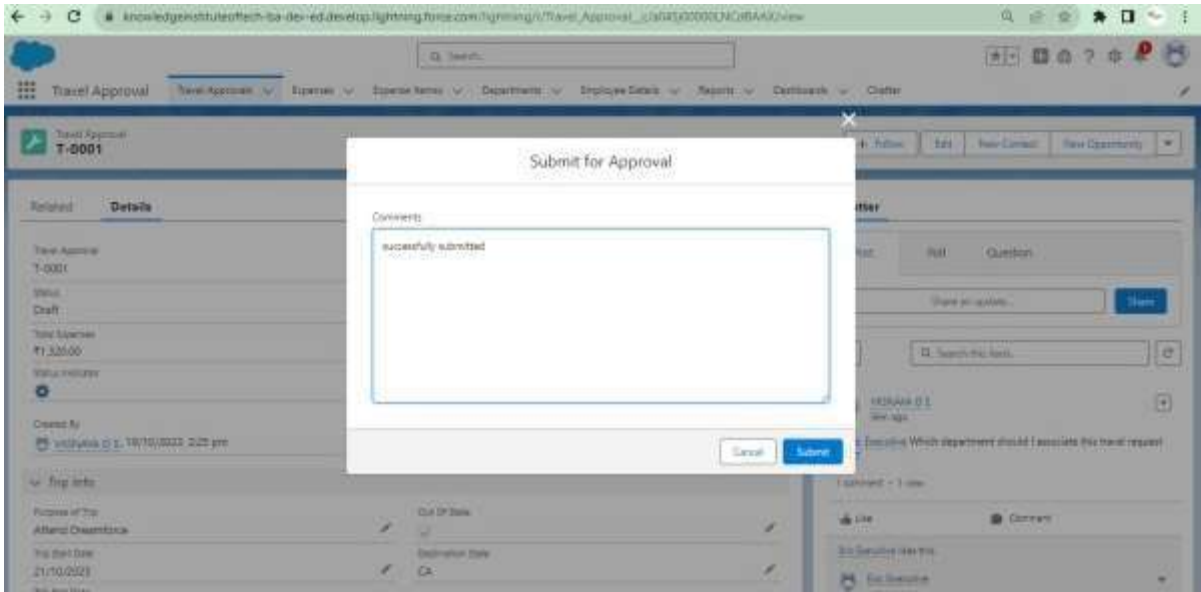
Step 8: Save the Flow

Step 9: Activate the Flow

Step 10: Test the Flow







# 6.REPORTS & DASHBOARD

## Reports

A report is a list of records that meet the criteria you define. It's displayed in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

### 1)Create A Report

Step 1: Log in to your Salesforce account with the necessary permissions.

Step 2: Click on the "App Launcher" (grid icon) and search for "Reports." Click on "Reports" to open the Report Builder.

Step 3: In the Report Builder, click the "New Report" button to start creating a new report.

Step 4: Select the report type that aligns with the data you want to analyse. You can choose from standard objects like "Travel Request" or create custom report types if needed.

Step 5: Define criteria for your report by selecting the fields and filters that are relevant to your analysis.

Step 6: Select the fields you want to include as columns in your report. This will determine the data that appears in the report results. Step 7: If necessary, you can group and summarize data to create subtotals or aggregate values based on specific fields.

Step 8: After configuring the report, click the "Save & Run" button to generate the report results.

Step 9: Save the report for future access and make it available to users who need to view the data.

knowledge@tutso.tech:ba-dev-ed:develop/lightning.force.com/lightning/r/Report/0001J000009QCx5EAG/view

Travel Approval

### Report: Travel Approvals

#### Travel Requests by Department

Total Records: 48 | Total Out Of State: 40

Department 1	Travel Approval: Travel Approval	Status	Out Of State	Destination State	Trip Start Date	Trip End Date
Aunt Services (A)	1-0029	Rejected	<input checked="" type="checkbox"/>	FL	21/09/2022	24/09/2022
	1-0031	Rejected	<input checked="" type="checkbox"/>	CA	22/11/2022	28/11/2022
	1-0040	Rejected	<input checked="" type="checkbox"/>	CA	27/04/2022	18/04/2023
	1-0025	Rejected	<input checked="" type="checkbox"/>	FL	28/08/2022	14/09/2022
<b>Subtotal</b>			4			
Disability Determination Bureau (H)	1-0030	Rejected	<input type="checkbox"/>	TX	14/09/2022	14/09/2022
	1-0041	Rejected	<input checked="" type="checkbox"/>	OK	22/12/2022	20/12/2022
	1-0006	Rejected	<input checked="" type="checkbox"/>	OK	28/05/2022	27/05/2022
	1-0011	Rejected	<input checked="" type="checkbox"/>	CA	25/07/2022	29/07/2022
<b>Subtotal</b>			3			
Division of Aging (S)	1-0035	Rejected	<input checked="" type="checkbox"/>	CA	28/06/2022	22/06/2022
	1-0046	Rejected	<input type="checkbox"/>	TX	11/02/2022	11/02/2022
	1-0017	Rejected	<input checked="" type="checkbox"/>	GA	24/12/2022	28/01/2023
<b>Subtotal</b>			2			

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

knowledge@tutso.tech:ba-dev-ed:develop/lightning.force.com/lightning/r/Report/0001J000009QCx5EAG/view?queryScope=userFolders

Travel Approval

### Report: Travel Approvals

#### Travel Requests by Department

Total Records: 48 | Total Out Of State: 40

Department 1	Travel Approval: Travel Approval	Status	Out Of State	Destination State	Trip Start Date	Trip End Date
Aunt Services (A)	1-0029	Pending Approval	<input checked="" type="checkbox"/>	FL	21/09/2022	24/09/2022
	1-0031	Approved	<input checked="" type="checkbox"/>	CA	22/11/2022	28/11/2022
	1-0040	Rejected	<input checked="" type="checkbox"/>	CA	27/04/2022	18/04/2023
	1-0045	Rejected	<input checked="" type="checkbox"/>	FL	28/08/2022	14/09/2022
<b>Subtotal</b>			4			
Disability Determination Bureau (H)	1-0030	Rejected	<input type="checkbox"/>	TX	14/09/2022	14/09/2022
	1-0041	Rejected	<input checked="" type="checkbox"/>	OK	22/12/2022	20/12/2022
	1-0006	Draft	<input checked="" type="checkbox"/>	OK	28/05/2022	27/05/2022
	1-0011	Submitted	<input checked="" type="checkbox"/>	CA	25/07/2022	29/07/2022
<b>Subtotal</b>			3			
Division of Aging (S)	1-0035	Rejected	<input checked="" type="checkbox"/>	CA	28/06/2022	22/06/2022
	1-0046	Rejected	<input type="checkbox"/>	TX	11/02/2022	11/02/2022
	1-0017	Rejected	<input checked="" type="checkbox"/>	GA	24/12/2022	28/01/2023
<b>Subtotal</b>			2			

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

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Travel Approval

REPORT ▼

New Travel Approvals Report / Travel Approvals

Processing a limited number of records. Run the report to see everything.

Update Periods Automatically

Group	Trip End Date	Trip Start Date	Travel Approval: Travel Approval	Department	Status	Out Of State	Destination State
January 2022 (1)	04/01/2022 (1)	T-0006	Office of Early Childhood and Out-of-School Learning	Rejected	1	OK	
Subtotal					1		
March 2022 (2)	15/03/2022 (1)	T-0020	Division of Disability and Rehabilitation Services	Rejected	1	GA	
Subtotal					1		
	18/03/2022 (1)	T-0023	Office of Medicaid Policy and Planning	Rejected	1	GA	
Subtotal					2		
April 2022 (1)	21/04/2022 (1)	T-0001	Human Resources	Rejected	1	FL	
Subtotal					1		
June 2022 (3)	31/05/2022 (1)	T-0029	Audit Services	Pending Approval	1	FL	
Subtotal					1		
	06/06/2022 (1)	T-0025	Division of Aging	Rejected	1	OK	
Subtotal					1		

Row Counts: Detail Rows: Subtotals: Grand Total:

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Travel Approval

REPORT

New Travel Approvals Report

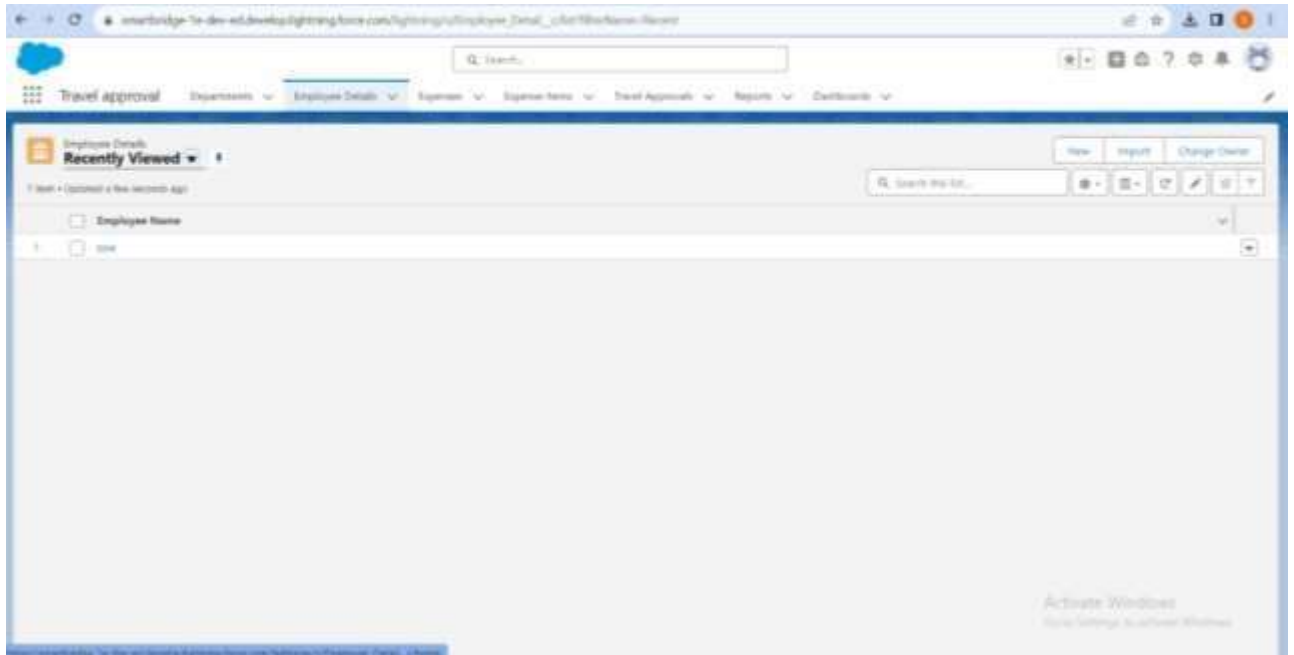
Travel Approvals

Processing a limited number of records. Run the report to see everything.

Update Periods Automatically

Group	Trip End Date	Trip Start Date	Out Of State	Travel Approval: Travel Approval	Department	Status	Destination State
January 2022 (1)	04/01/2022 (1)	1	T-0016	Office of Early Childhood and Out-of-School Learning	Rejected	OK	
Subtotal							
March 2022 (2)	15/03/2022 (1)	1	T-0020	Division of Disability and Rehabilitation Services	Rejected	GA	
Subtotal							
	18/03/2022 (1)	1	T-0023	Office of Medicaid Policy and Planning	Rejected	GA	
Subtotal							
April 2022 (1)	21/04/2022 (1)	1	T-0001	Human Resources	Rejected	FL	
Subtotal							

Row Counts: Detail Rows: Subtotals: Grand Total:



## **Dashboard**

Dashboards provide more insights than reports as they combine the data from many reports and show a summarized result. Looking at many reports at a time gives the flexibility of combining the results from them quickly. Also, summaries in dashboards help us decide on action plans quicker. The dashboards can contain charts, graphs and Tabular data.

### **1)Create A Dashboard**

Step 1: Log in to Salesforce

Step 2: Access the Dashboard Builder

Step 3: Create a New Dashboard

Step 4: Select the type of dashboard you want to create

Step 5: Name Your Dashboard as "Travel Request Dashboard."

Step 6: Add dashboard components like charts, tables, or lists to your dashboard. These components will display the data from your reports.

Step 7: Configure each component by selecting the report you want to display, specifying chart types, and setting up filters if needed.

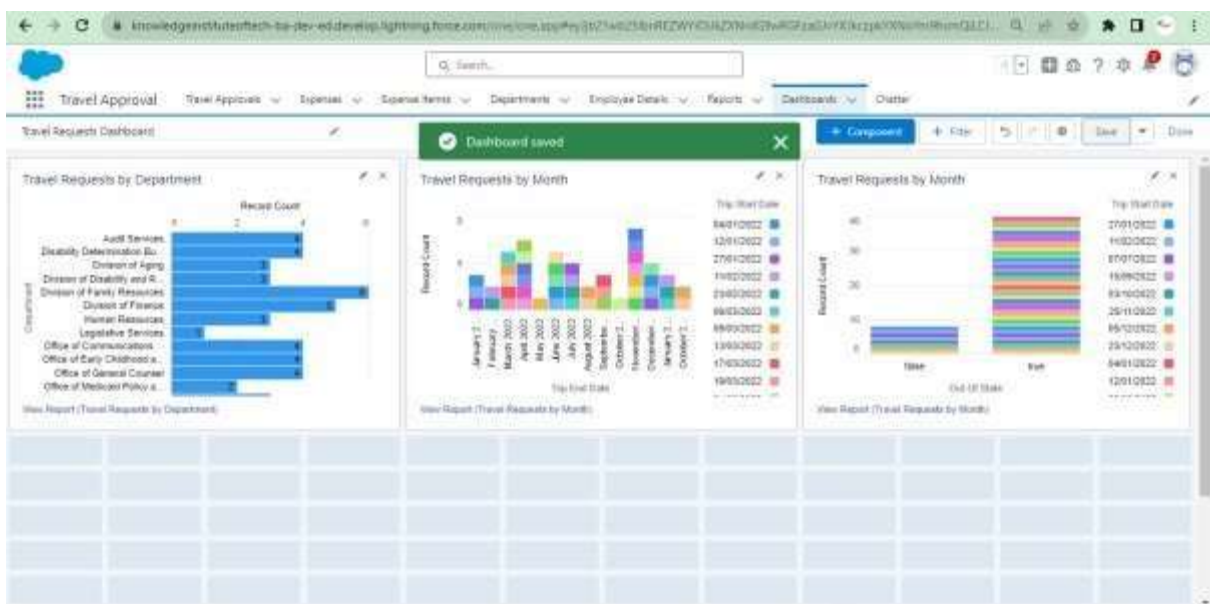
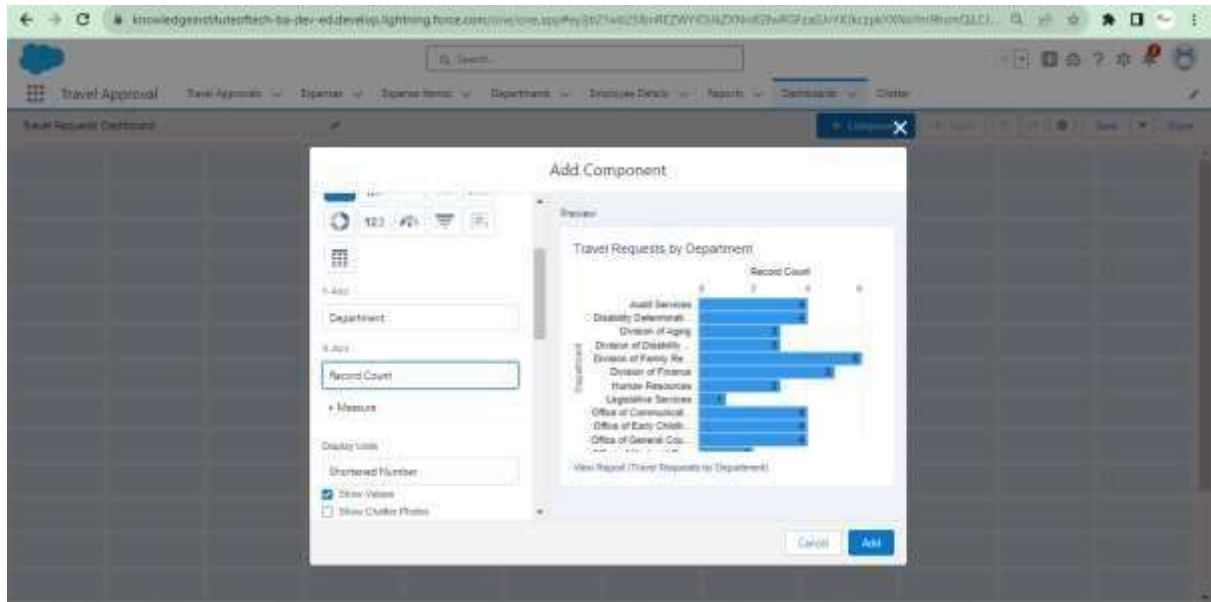


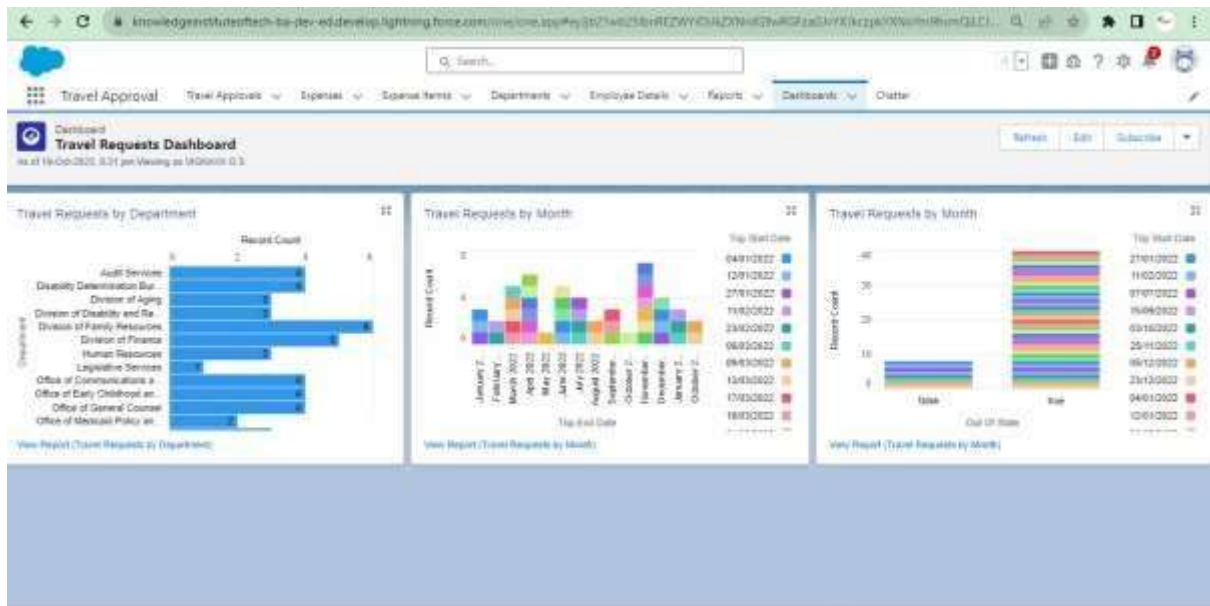
Step 8: Customize Dashboard Layout

Step 9: Save the Dashboard

Step 10: Share the Dashboard

Step 11: Run and View the Dashboard





knowledgeinstutsoftsch-ba-dev-ed.develop.lightning.force.com/lightning/a/Travel\_Approval\_\_rpt?ITItemName=Report

Q Search...

Travel Approval Travel Approvals Expenses Expense Items Departments Employee Details Reports Dashboards Chatter

Travel Approvals  
Recently Viewed

10 Items • Updated a few seconds ago

Q Search this list...

Filter Report Change Owner

Travel App...	Purpose of Trip	Department	Status	Destination	Trip Start Date	Trip End Date
1 T-0004	Abernathy, Beatty and Laffer	Division of Finance	Approved	CA	09/09/2023	09/09/2023
2 T-0011	Roberts Inc.	Disability Determination Bureau	Submitted	CA	09/07/2023	09/07/2023
3 T-0006	Walter-Herman	Disability Determination Bureau	Draft	OK	09/09/2023	07/07/2023
4 T-0001	Olson-Schmidt	Audit Services	Approved	CA	09/11/2023	09/11/2023
5 T-0028	Wyndel Group	Audit Services	Pending Approval	FL	01/05/2023	04/06/2023
6 T-0013	McKee Inc.	Human Resources	Submitted	GA	27/08/2023	08/09/2023
7 T-0009	Eden Inc.	Office of Early Childhood and Out-of-School Learning	Pending Approval	OK	25/04/2023	05/05/2023
8 T-0003	Homerick, Waters and Guckowski	Division of Disability and Rehabilitation Services	Approved	OK	09/04/2023	09/04/2023
9 T-0002	Attend Party	Technology	Rejected	TX	24/10/2023	28/10/2023
10 T-0001	Attend Dreamforce	Technology	Approved	CA	27/10/2023	24/10/2023

knowledgeinstututech-sa-dev-ed.develop.lightning.force.com/lightning/setup/Department?ObjectReferenceName=00B520000001TAC

Travel Approval | Travel Approvals | Expenses | Expense Items | **Departments** | Employee Details | Reports | Certificates | Chatter

Departments  
All

18 items • Sorted by Department Name • Filtered by All departments • Updated a few seconds ago

Search this list...

	Department Name	
1	Audit Services	
2	Contract Management	
3	Contract Management	
4	Disability Determination Bureau	
5	Division of Aging	
6	Division of Disability and Rehabilitative Services	
7	Division of Family Resources	
8	Division of Housing	
9	Division of Mental Health and Addiction	
10	Human Resources	
11	Legislative Services	
12	Office of Communications and Media	
13	Office of Early Childhood and Out-of-School Learning	
14	Office of General Counsel	
15	Office of Medical Policy and Planning	

knowledgeinstututech-sa-dev-ed.develop.lightning.force.com/lightning/setup/ObjMgrManage?ObjectReferenceName=00B520000001TAC&Page=FieldsAndRelationshipsView

Setup | Home | Object Manager | **Travel Approval**

Details | **Fields & Relationships** | 14 items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Department	Department_c	Lookup(Department)		✓
Destination State	Destination_State_c	Text()		
Employee Name	Employee_Name_c	Lookup(Employee Detail)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Out Of State	Out_Of_State_c	Checkbox		
Owner	OwnerId	Lookup(User Group)		✓
Purpose of Trip	Purpose_of_Trip_c	Text Area(255)		
Status	Status_c	Picklist		

## **GitHub & Project Video Demo Link**

GitHub: <https://github.com/SowmiyaNallapan/Salesforce-Developer>

Video Demo Link:

<https://drive.google.com/file/d/15mnKu9WiTFSVenzpbPhQAempNuxscTQx/view?usp=drivesdk>