

# BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES (ADMIN)

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## Step 1:

### Creating Developer Org by using Developer Edition Link

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First Name\*  
Your first name

Last Name\*  
Your last name

Email\*  
Your email address

Role\*  
Your job role

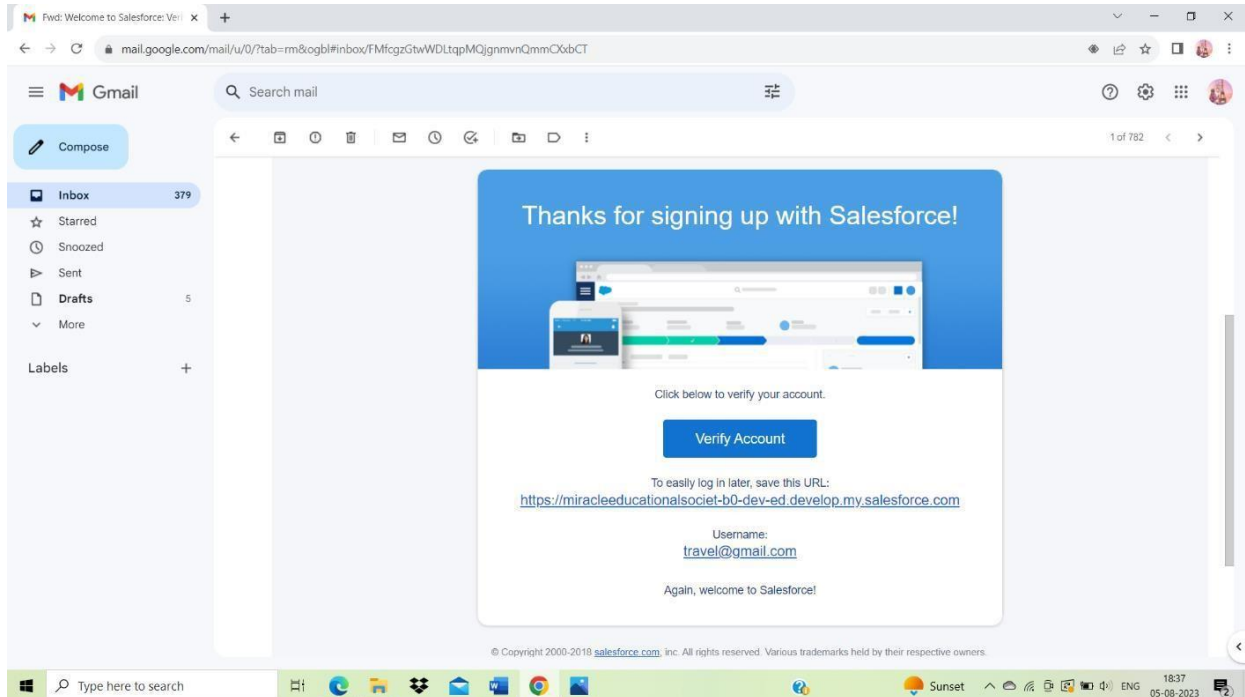
Company\*  
Company Name

Country/Region\*  
Country/Region

Postal Code\*  
Your postal code

Username\*  
jane@company.sandbox

## Step 2: Account Activation



**We can create password by clicking verify Account then we can directly login to salesforce Account**

## Step 3: Creation Of Objects for Travel Approval App

**We Can Create Developer Object in Object Manager by clicking on create – Custom Object and follow the steps in the guide**

WhatsApp x New Custom Object | Salesforce x +

miracleeducationalsociet-b0-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

SETUP  
New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

In The Same Manner We have to Create Employee details , Expense, Expense items and Travel Approval Objects.

Step 4:

## Creation of Custom Tab

WhatsApp x Tabs | Salesforce x +

miracleeducationalsociet-b0-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%2...

Setup Home Object Manager

SETUP  
Tabs

New Custom Object Tab Help for this Page

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object

Tab Style

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

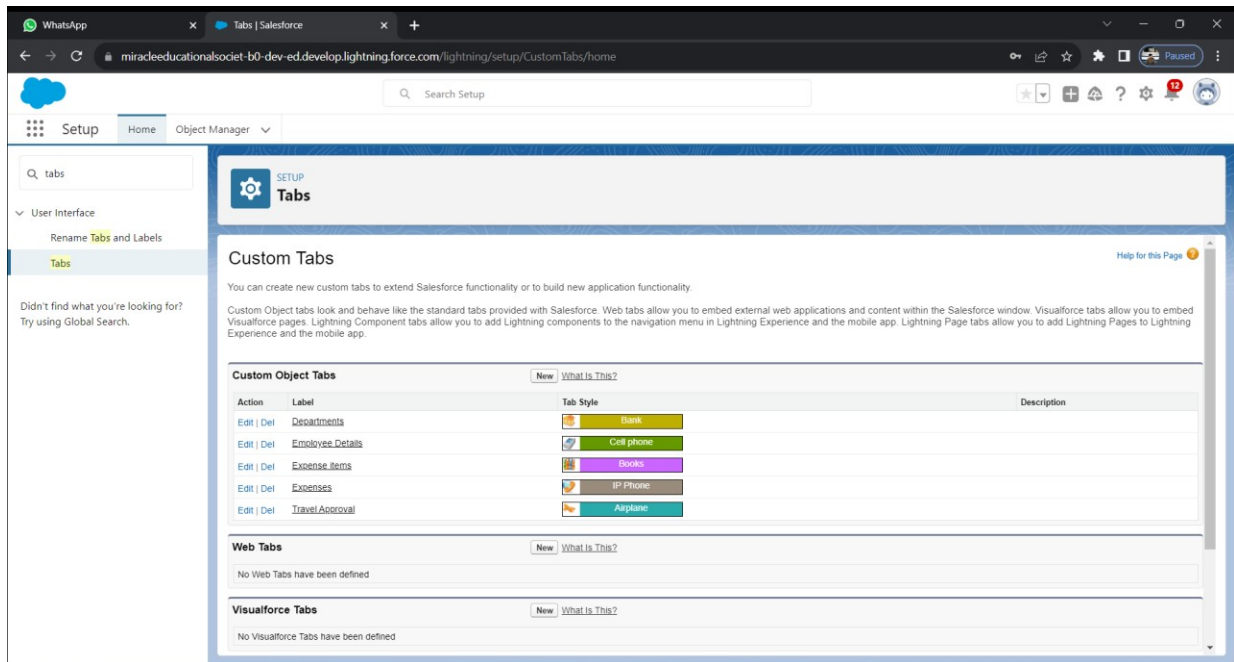
Splash Page Custom Link

Enter a short description.

Description

Next Cancel

Here We can create Tabs for our objects which we created earlier

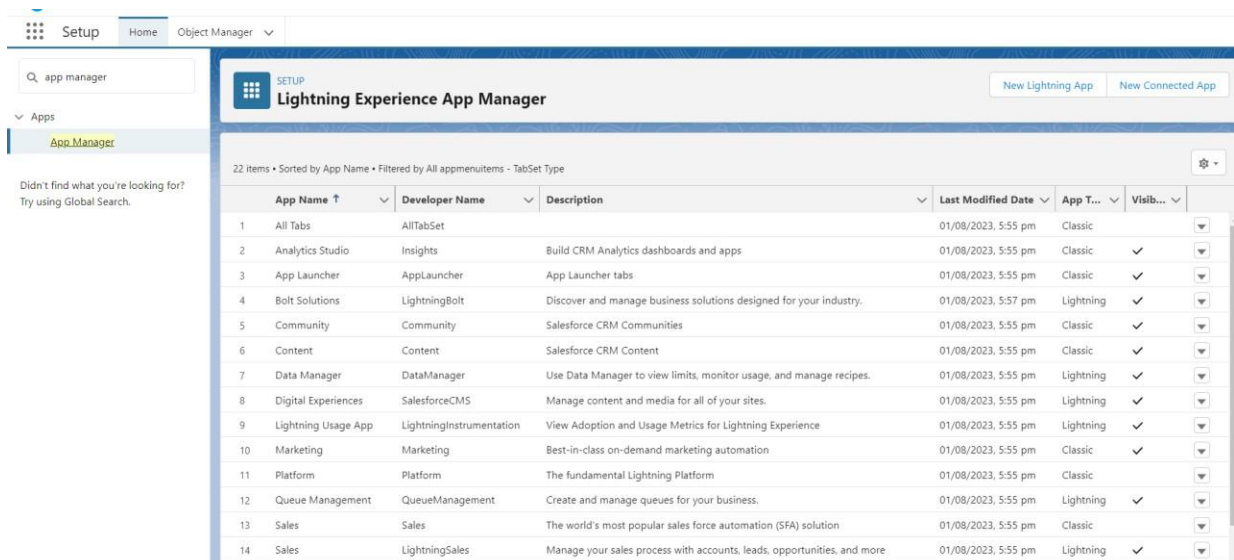


## Step 5:

# Create Travel Approval App (Lightning App)

Now We Can Create a New Lightning App by Using App Manager

Click New Lightning app



In those we Can Create a New lighting App

**App Settings**

**App Details & Branding**

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

**App Details & Branding**

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

**App Details**

\* App Name <sup>?</sup>  
Travel Approval

\* Developer Name <sup>?</sup>  
Travel\_Approval

Description <sup>?</sup>  
Enter a description...

**App Branding**

Image <sup>?</sup>  
Upload

Primary Color Hex Value <sup>?</sup>  
#0070D2

Org Theme Options  
☐ Use the app's image and color instead of the org's custom theme

**App Launcher Preview**

TA Travel Approval

We have to give the app name as Travel Approval

Leave the default items and click next until we find Available items

**App Settings**

App Details & Branding

App Options

Utility Items (Desktop Only)

**Navigation Items**

User Profiles

**Navigation Items**

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

**Available Items** <sup>?</sup> Create

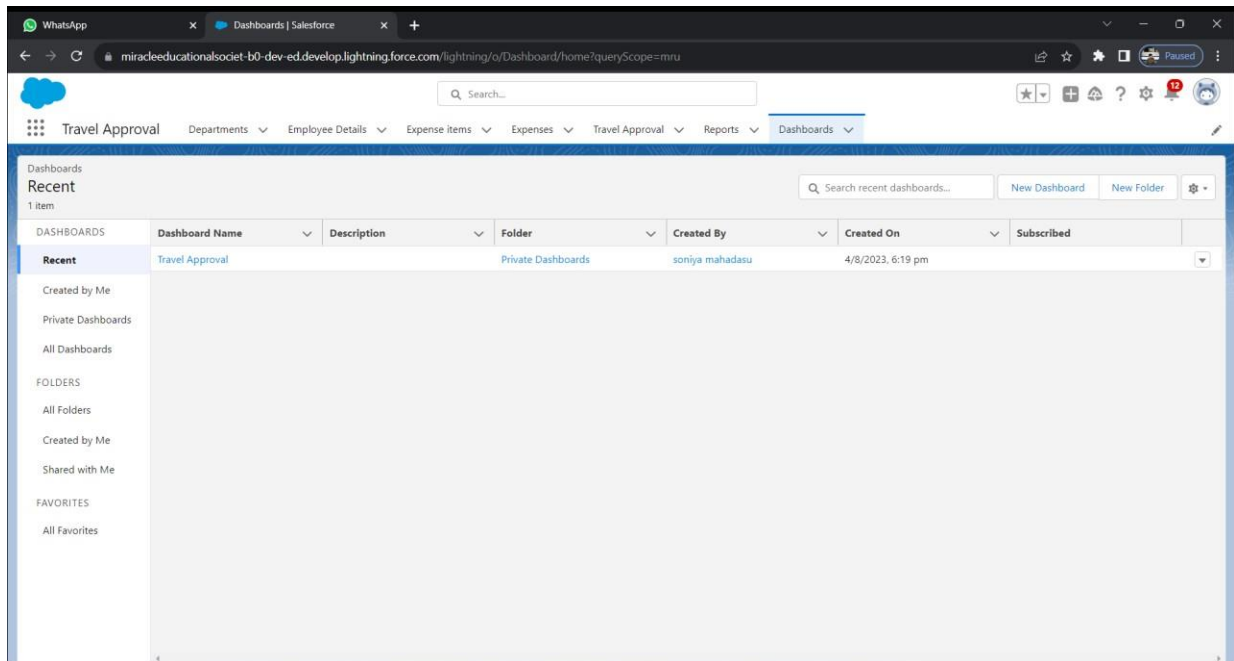
Type to filter list...

- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods

**Selected Items**

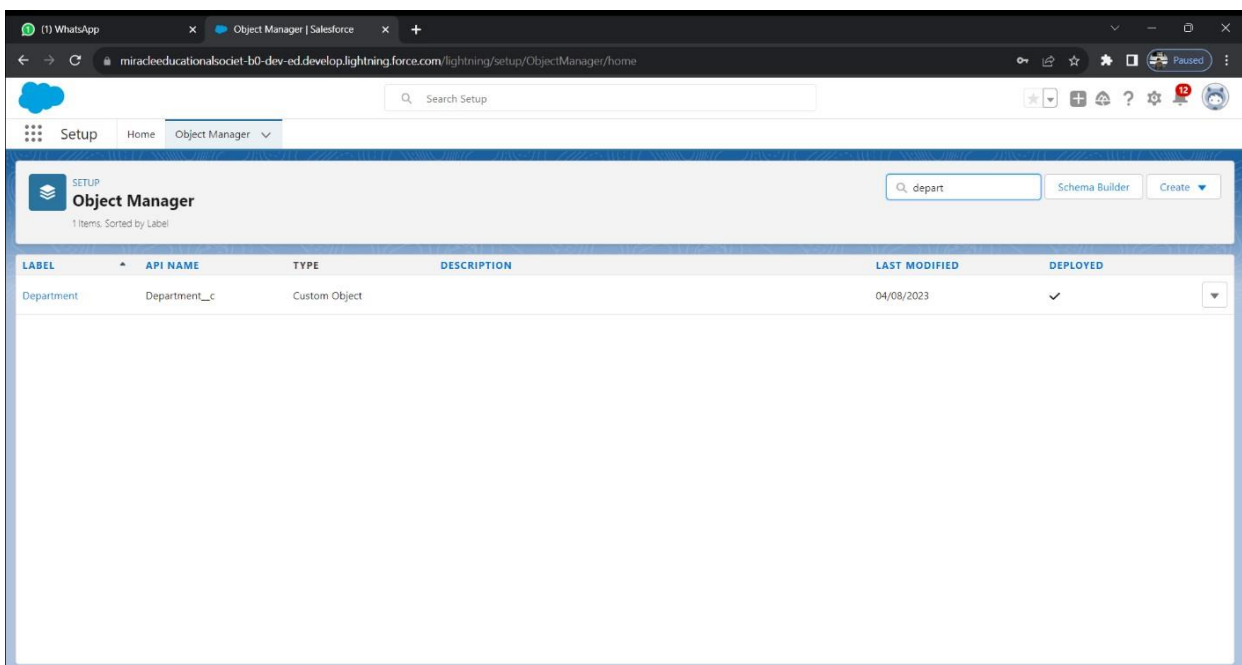
- Departments
- Employee Details
- Expenses
- Expense Items
- Travel Approvals
- Reports
- Dashboards

After moving the items to Selected items from Available Profile Move the System Administrator into Selected Profiles and save



## Step 6: Creation of fields for the objects we created earlier

In Those Manner We Can Create a Department Field Data



In department object fields and Relationships click on new Select Datatype this field is of text type and click next

Fill the field name as Department code and length as 5 Later we can click next, next & save

The screenshot shows the Salesforce Setup interface for creating a new custom field for the 'Department' object. The page title is 'New Custom Field' and it is 'Step 2 of 4: Enter the details'. The left sidebar shows the 'Fields & Relationships' section. The main form contains the following fields and options:

- Field Label:** Department Code
- Length:** 5
- Field Name:** Department\_Code
- Description:** (empty text area)
- Help Text:** (empty text area)
- Required:** ☐ Always require a value in this field in order to save a record
- Unique:** ☐ Do not allow duplicate values
  - ☐ Treat "ABC" and "abc" as duplicate values (case insensitive)
  - ☐ Treat "ABC" and "abc" as different values (case sensitive)
- External ID:** ☐ Set this field as the unique record identifier from an external system
- Auto add to custom report type:** ☒ Add this field to existing custom report types that contain this entity

Follow the above steps and create two more text type fields District and State , provide length as 40 for both

Create URL type field and give School Website as the field label

In this We can create new look up data type on the fields & relationship Later we can click on the Department object to the related object

The screenshot shows the Salesforce Setup interface for creating a new relationship for the 'Department' object. The page title is 'New Relationship' and it is 'Step 2: Choose the related object'. The left sidebar shows the 'Fields & Relationships' section. The main form contains the following fields and options:

- Step 2: Choose the related object**
- Select the other object to which this object is related:** (dropdown menu)
- Related To:** (dropdown menu)

The dropdown menu for 'Select the other object to which this object is related' is open, showing a list of objects including: Contact Point Email, Contact Point Phone, Contact Point Type Consent, Content Folder, Contract, Contract Line Item, Conversation, Credential Stuffing Event Store, Credit Memo, Credit Memo Invoice Application, Credit Memo Line, Customer, D&B Company, Data Use Legal Basis, Data Use Purpose, Department, Employee Detail, Engagement Channel Type, Engagement Channel Work Type, Entitlement, and None--.



Then we can enter the next step we can add a field label name as Department

The screenshot shows the Salesforce Setup interface for creating a new relationship for the 'Department' object. The page is titled 'Department New Relationship' and is at 'Step 3 of 6: Enter the label and name for the lookup field'. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area contains the following fields:

- Field Label:** Department
- Field Name:** Department
- Description:** (empty text box)
- Help Text:** (empty text box)
- Child Relationship Name:** Departments1
- Auto add to custom report type:** ☒ Add this field to existing custom report types that contain this entity
- Lookup Filter:** (Optional, create a filter to limit the records available to users in the lookup field. [Tell me more!](#))

Navigation buttons at the top right include 'Previous', 'Next', and 'Cancel'.

Then click Next, Next, Save.

The screenshot shows the 'Fields & Relationships' page for the 'Department' object. The page displays a list of 9 fields, sorted by Field Label. The fields are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Department	Department__c	Lookup(Department)		✓
Department Code	Department_Code__c	Text(5)		
Department Name	Name	Text(80)		✓
District	District__c	Text(40)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
State	State__c	Text(40)		

The page also includes a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

In those way we can create all the fields on Department, Employee details, Expense, Expense items and Travel Approval objects by using the given datatypes in the data(Text,Lookup,Roolup summary,pick List,date)



## Step 7:

# Import Departments Data

To import data before we have to create a department csv file as shown in the data. In quick find click on data import wizard in that click on launch wizard and carefully follow the steps from the data

The screenshot shows the Salesforce Data Import Wizard interface. The 'Choose data' step is active, showing a progress bar with three stages: 'Choose data', 'Edit mapping', and 'Start import'. Below the progress bar, the text reads 'Import your Data into Salesforce' and 'You can import up to 50,000 records at a time.' The main content area is divided into three sections: 'What kind of data are you importing?', 'What do you want to do?', and 'Where is your data located?'. The first section has tabs for 'Standard objects' and 'Custom objects', with 'Departments' selected under 'Standard objects'. The second section has a 'Match by:' dropdown set to '--None--', a 'Which User field in your file designates record owners?' dropdown set to '--None--', a 'Which Department field in your file do you want to match against to set the Department lookup field?' dropdown set to '--None--', and a 'Trigger workflow rules and processes?' checkbox. The third section has a 'Drag CSV file here to upload' area with a 'Choose File' button and a 'Character Code' dropdown set to 'ISO-8859-1 (General US & Western European, ISO-LATIN-1)'. The 'Values Separated By' dropdown is set to 'Comma'. At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons.

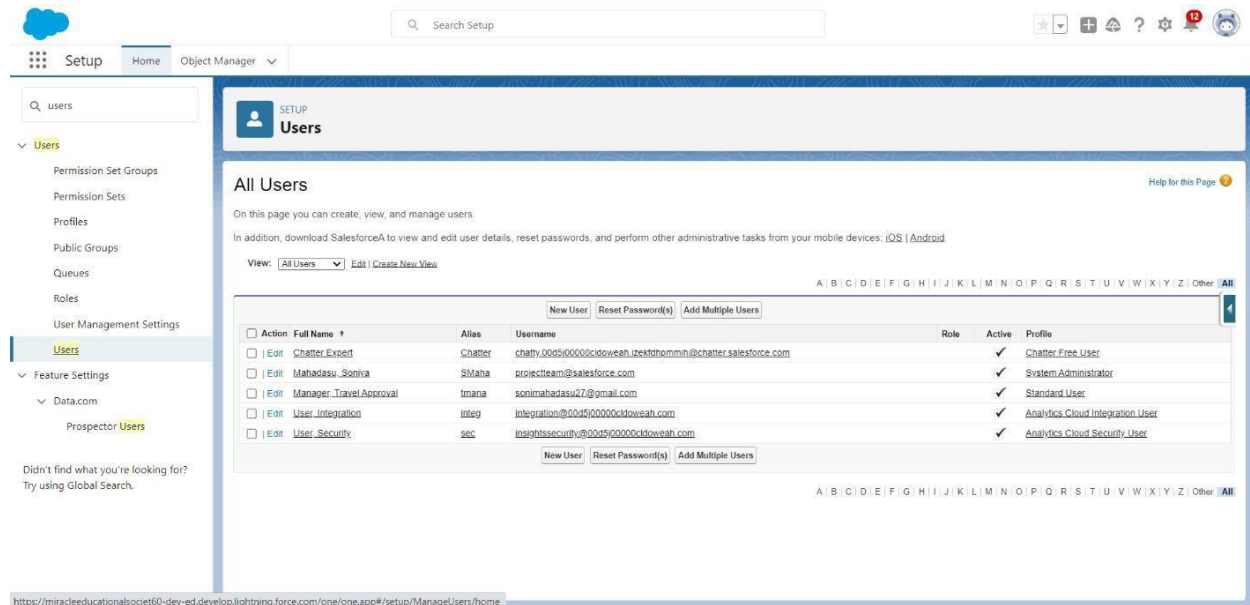
After choosing the csv file do mapping carefully and click next ,start import and click ok on the popup.

The screenshot shows the Salesforce Bulk Data Load Jobs page. The left sidebar contains a navigation menu with options like 'Field Mapping', 'Licenses & Limits', 'Prospector Preferences', 'Custom Code', 'Custom Metadata Types', 'Environments', 'Jobs', 'Integrations', 'Company Settings', and 'Data Classification'. The main content area is titled 'Bulk Data Load Jobs' and 'Monitor Bulk Data Load Jobs'. It includes a 'Quota' section showing 'Your organization has processed 0 batches in the last 24 hours. Your organization can process 15,000 batches in a 24-hour period.' Below this is an 'In Progress' section with a table showing no records to display. At the bottom, there is a 'Completed last 7 days' section with a table showing completed jobs.

Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
Z50500000FBJJ	mahadasu_soniya	04/08/2023, 5:50 pm	04/08/2023, 5:50 pm	Closed	Bulk V1	Insert	Department	16	16	00:00
Z50500000FBJT	mahadasu_soniya	04/08/2023, 5:40 pm	04/08/2023, 5:40 pm	Closed	Bulk V1	Insert	Department	16	16	00:00
Z50500000FJTA	mahadasu_soniya	03/08/2023, 11:49 pm	03/08/2023, 11:49 pm	Closed	Bulk V1	Insert	Department	4	0	00:00

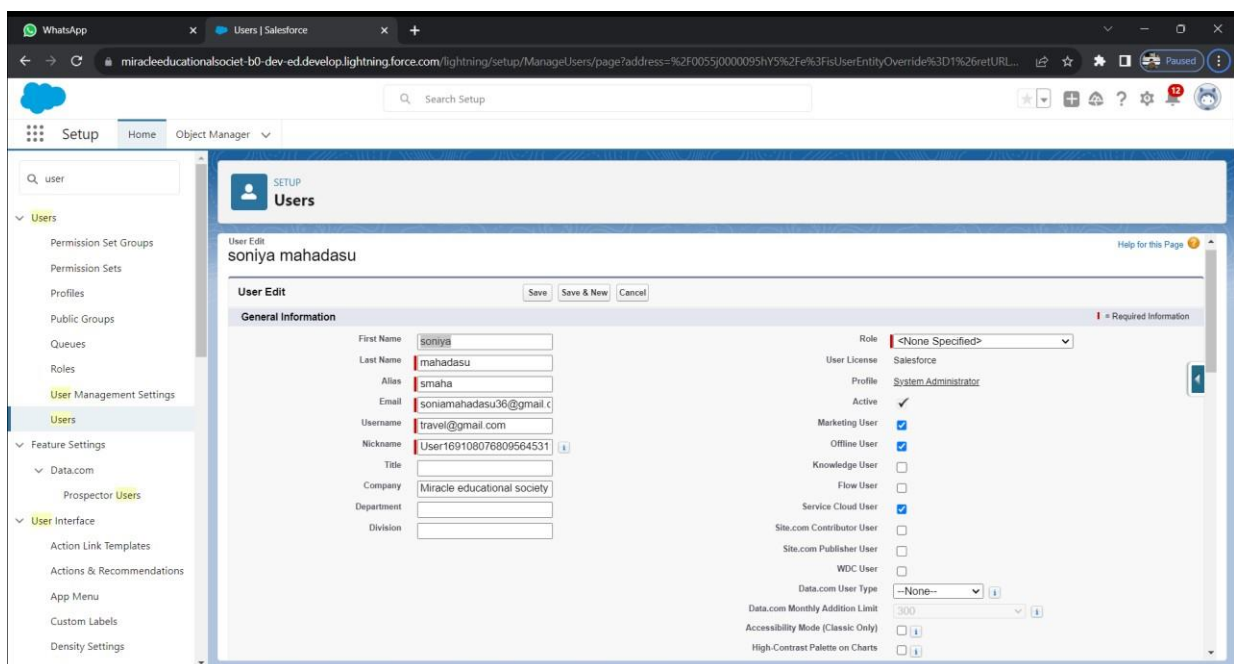
## Step 8: Creating a user in salesforce

In the users we can be create a user in those we can click on the home and click on the quick find box then enter user then click on the new user



We can enter the first name last name and username

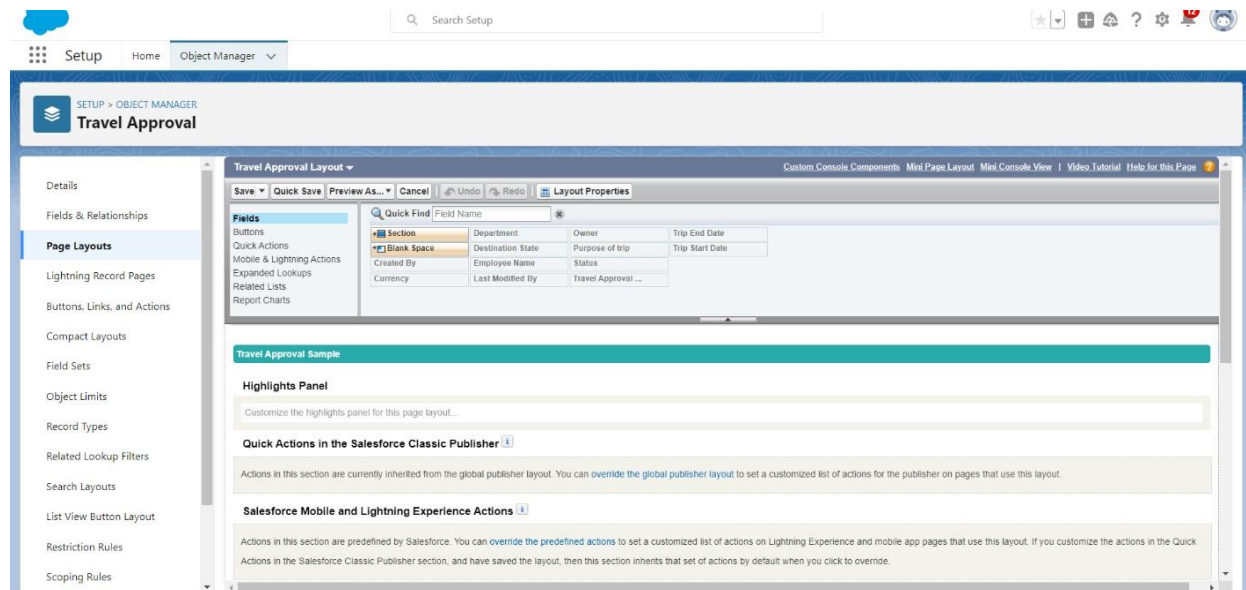
Click on the user licence as salesforce and profile as standard user



And click on the generate new password for login users of the data

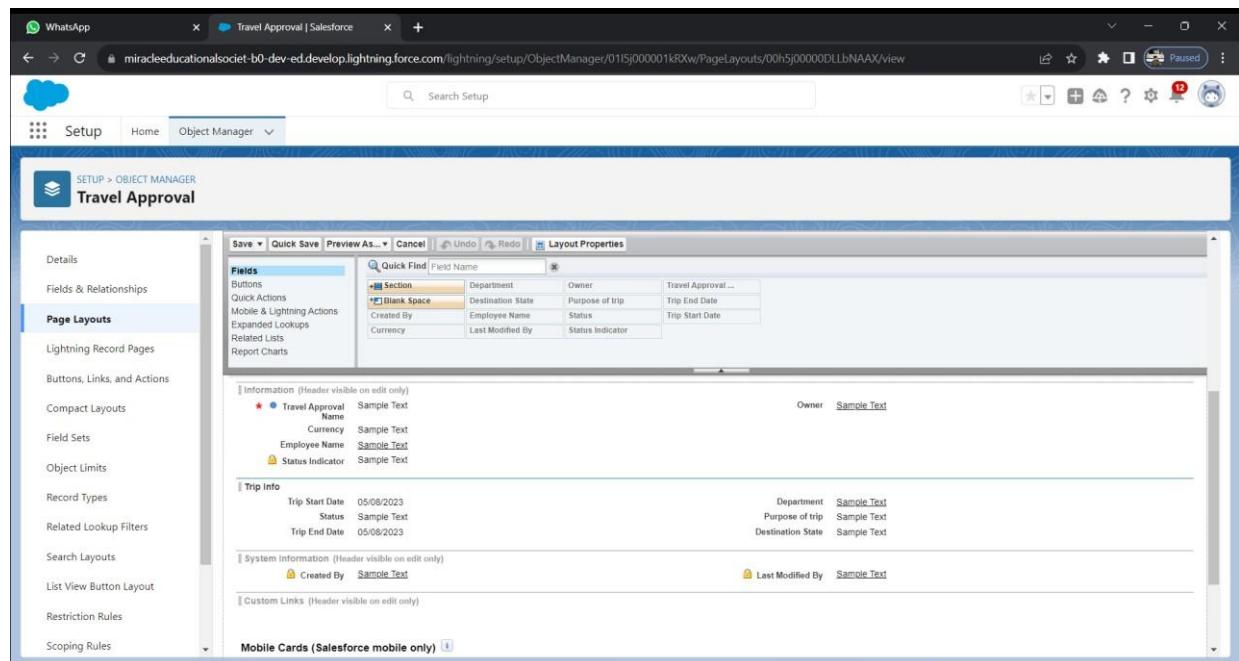
## Step 9: Customize Travel Approval Object Page layout

To customize page layout go to object manager and select Travel Approval object in that click on page layouts and click travel approval layout



Drag the section from the top and place below the information section Name the section as Trip info and click ok

Then drag Trip start date ,Trip end date and status from top to Trip info Later drag Destination state and purpose of a trip to Trip info,save.



# Step 10: Create Validation Rule

From object manager search for Travel Approval object open validation rule and click on new

The screenshot shows the Salesforce Setup interface for the 'Travel Approval' object. The 'Fields & Relationships' section is active, displaying a table of 12 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By, Currency, Department, Destination State, Employee Name, Last Modified By, Owner, Purpose of trip, Status, and Travel Approval Name. The 'Travel Approval Name' field is highlighted in blue.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Department	Department__c	Lookup(Department)		✓
Destination State	Destination_State__c	Text(40)		
Employee Name	Employee_Name__c	Lookup(Employee Detail)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Purpose of trip	Purpose_of_trip__c	Text(255)		
Status	Status__c	Picklist (Multi-Select)		
Travel Approval Name	Name	Text(80)		✓

Give the rule name as Date\_Validation and active should be checked Enter formula from data check no errors after input this condition

The screenshot shows the 'Validation Rule Edit' screen in Salesforce Setup. The rule name is 'Date\_Validation', it is active, and the error condition formula is 'Trip\_End\_Date\_\_c < Trip\_Start\_Date\_\_c'. The 'Error Message' field is empty. The 'Functions' dropdown is open, showing a list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The 'Check Syntax' button is visible at the bottom.

**Validation Rule Edit**

Rule Name:

Active: ☒

Description:

**Error Condition Formula**

Example: `Discount_Percent__c > 0.30`  
Display an error if Discount is more than 30%  
If this formula expression is **true**, display the text defined in the Error Message area

`Trip_End_Date__c < Trip_Start_Date__c`

**Functions**

Functions:

ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN

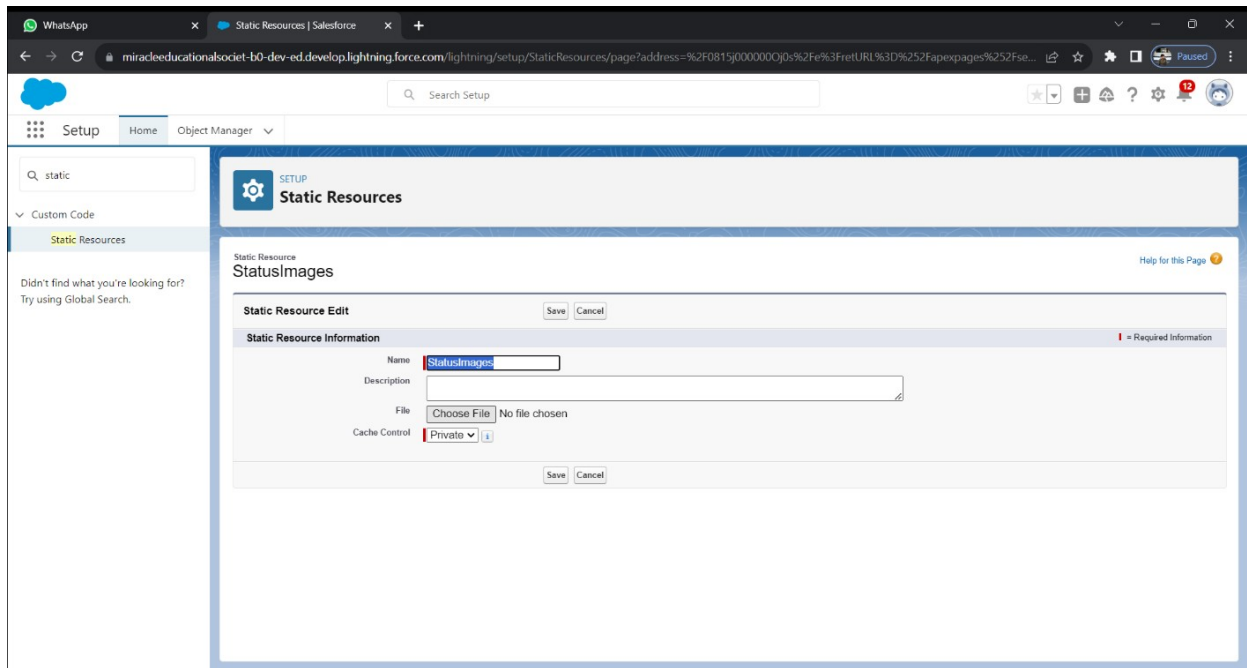
ABS(number)  
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

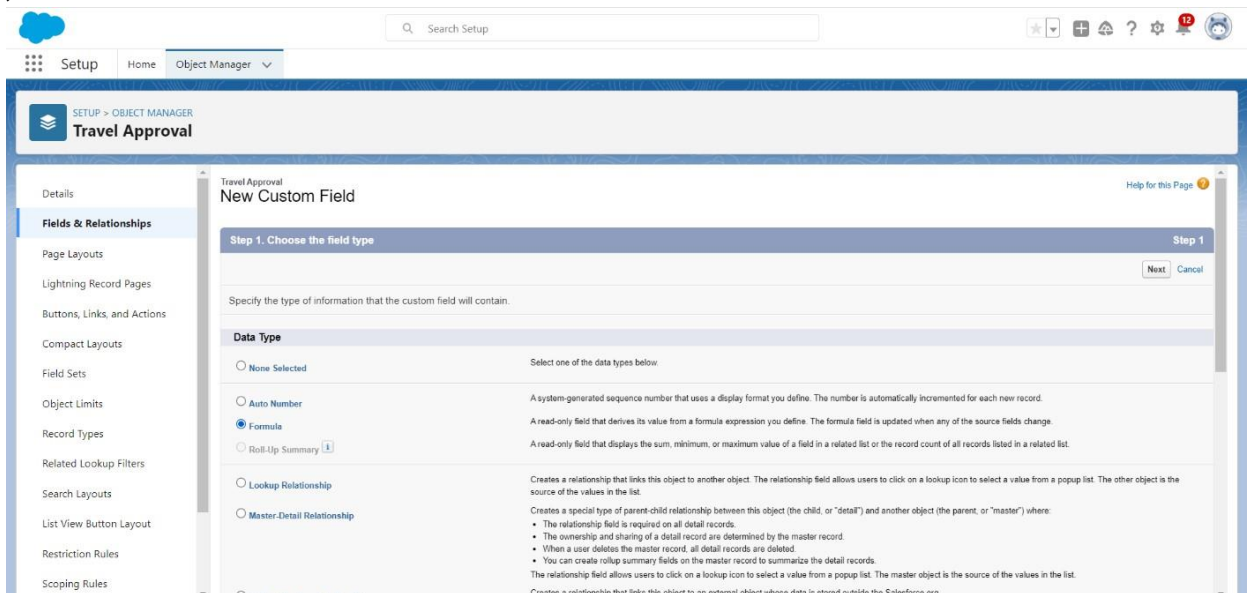
Give the error message and click on save

# Step 11: Create Formula Field

To create formulae field first we need a Zip file that contains statusimages.Zip .In setup click on static Resources and click new Enter name as StatusImages and choose the zip file ,save

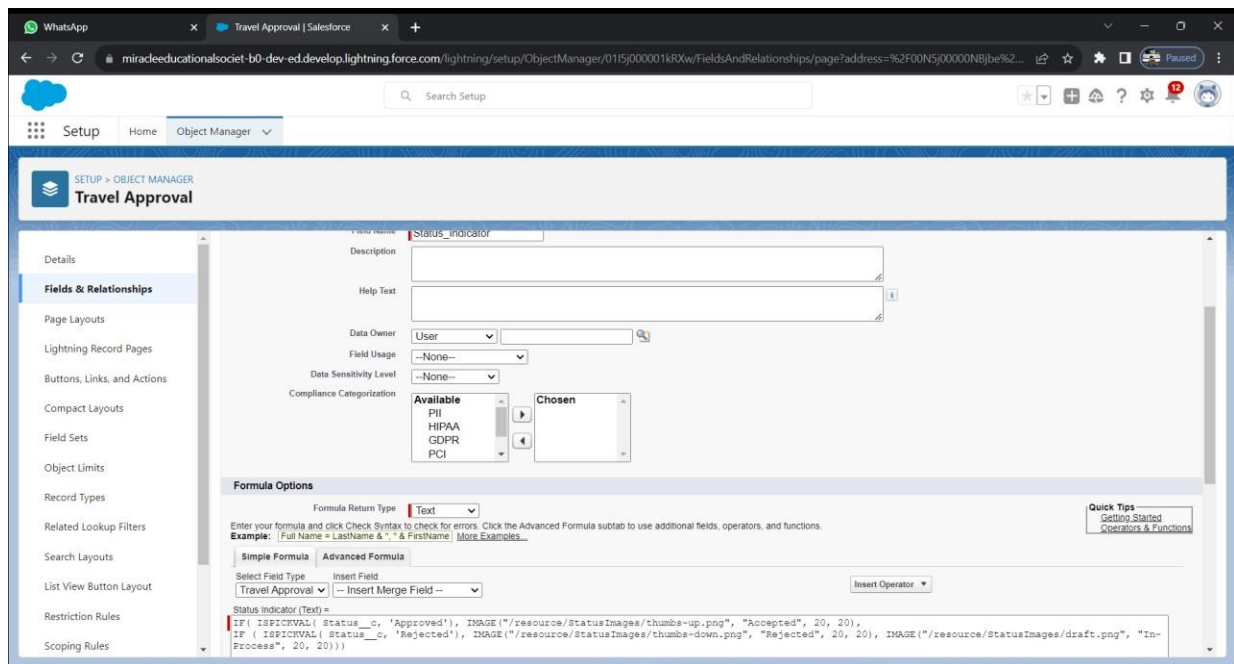


Select Travel Approval object Fields and Relationships click new select formula datatype ,click next



Enter the values from data and check there is no errors in formula





Click next, next and save

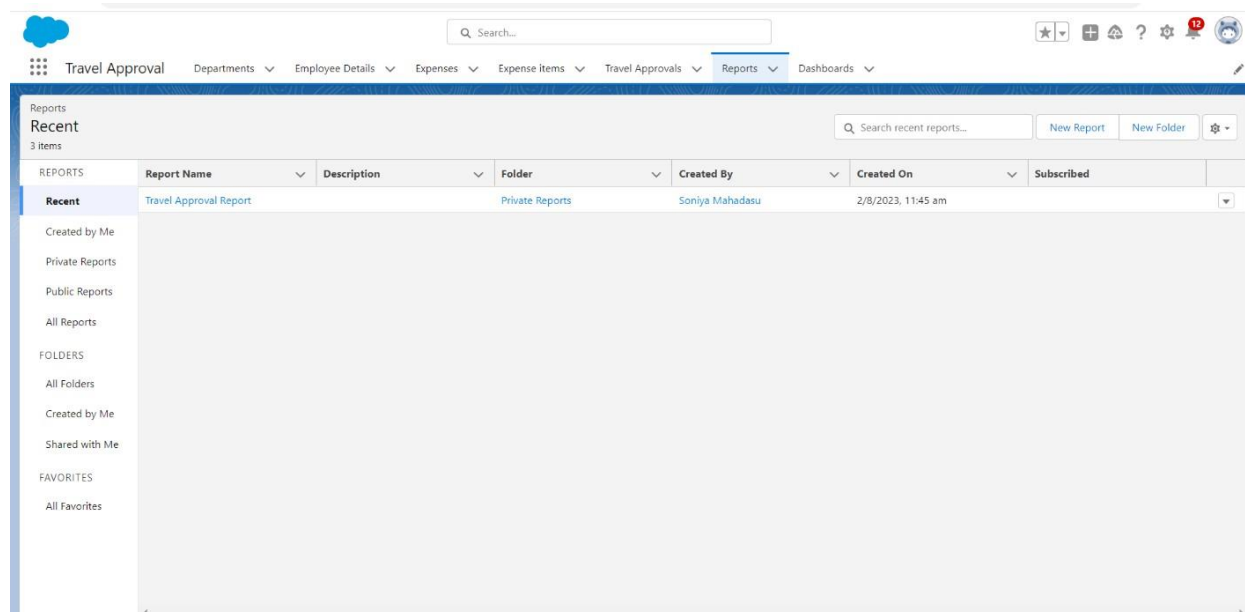
## Step 12:

## Create, View and Delete Records

Create Records:

Now click on the app launcher on the left side of the screen Click the Travel Approval on the app launcher

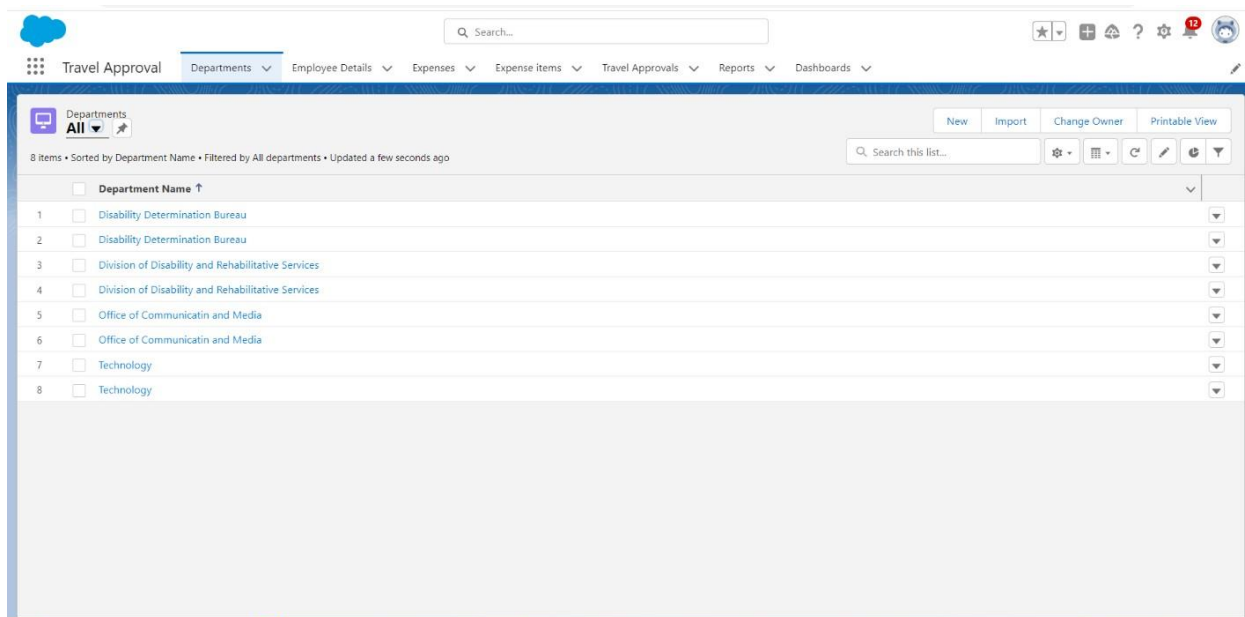
Click reports tab new reports and select report type as Trave Approval With Departments click start Report ,then proceed as in the data



After clicking save and run give report name as Travel Approval Reports

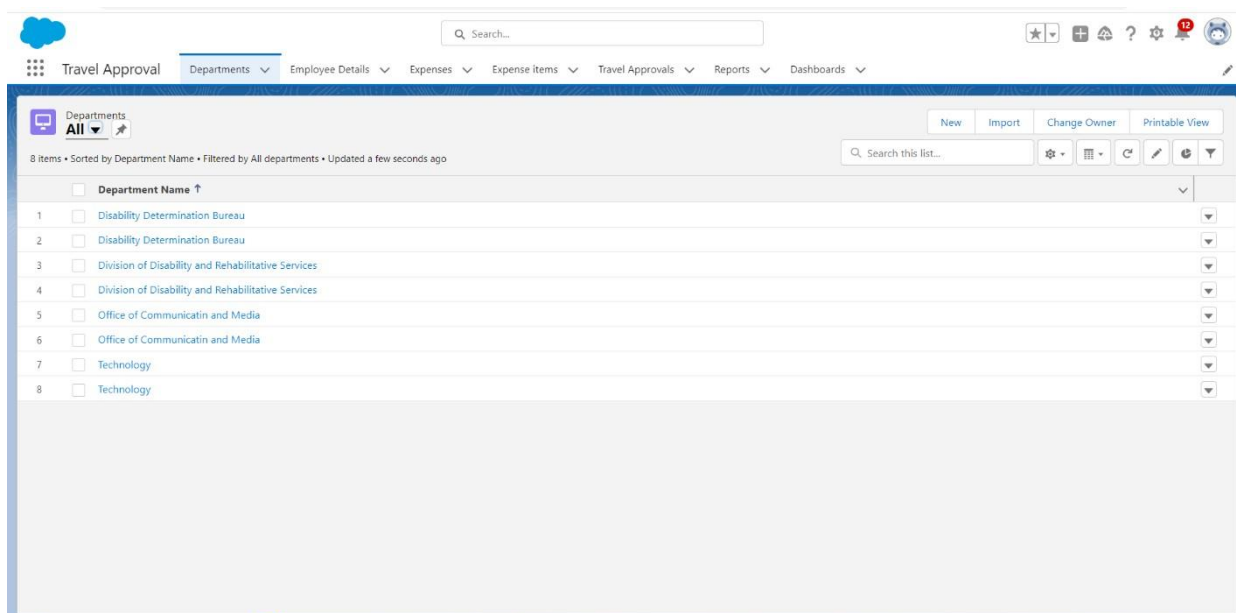
View Records :

Then we can view the created records on the Department Fielads



Delete Records :

We can click on the app launcher and search as Trave Approval We can delete the fields on the created data



In those we can delete the records on the object by clicking the arrow at Right-hand side on that record click delete and delete again .

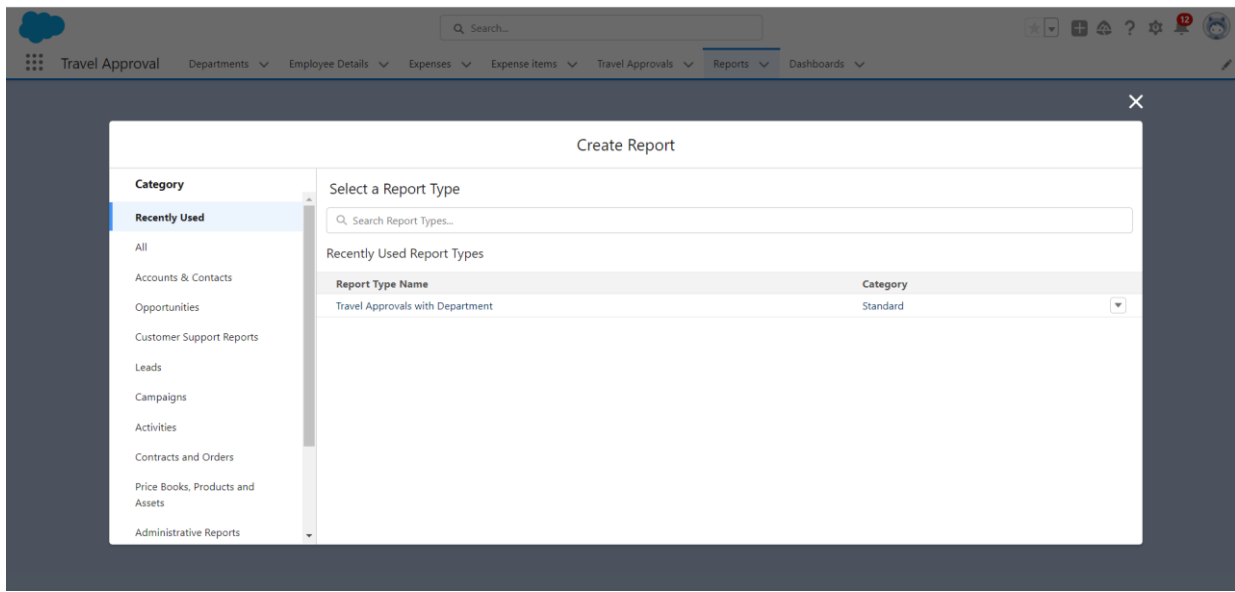


## Step 12:

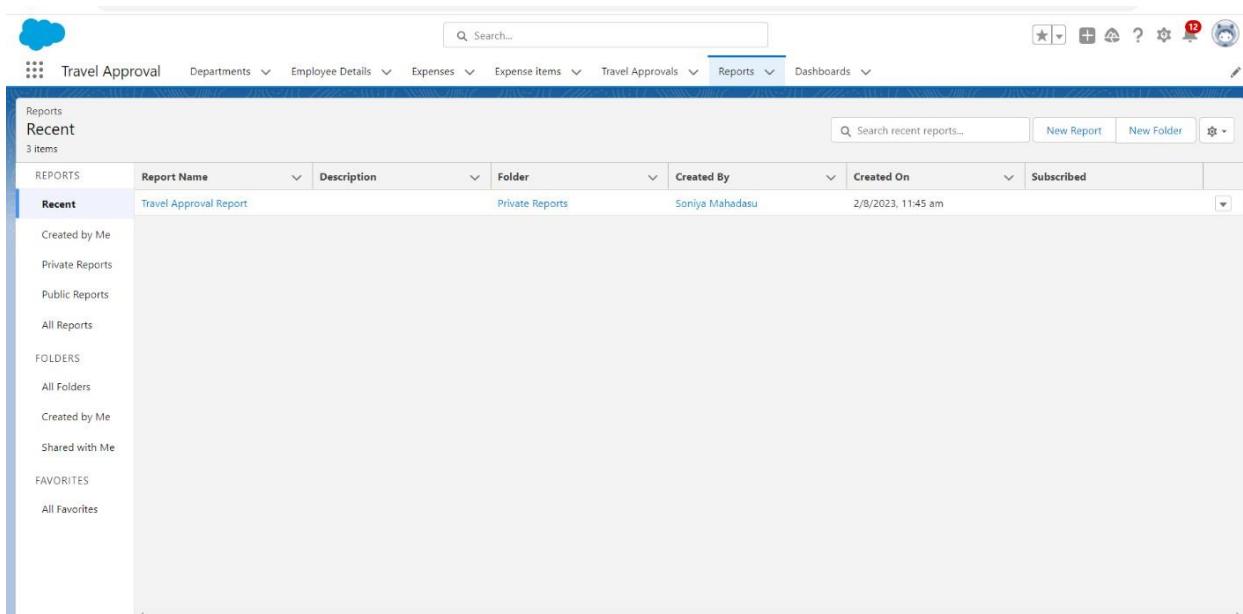
### Create and view Reports

#### Create Report:

We can click on the app launcher and search as Trave Approval Click on the reports tab and click on the new report



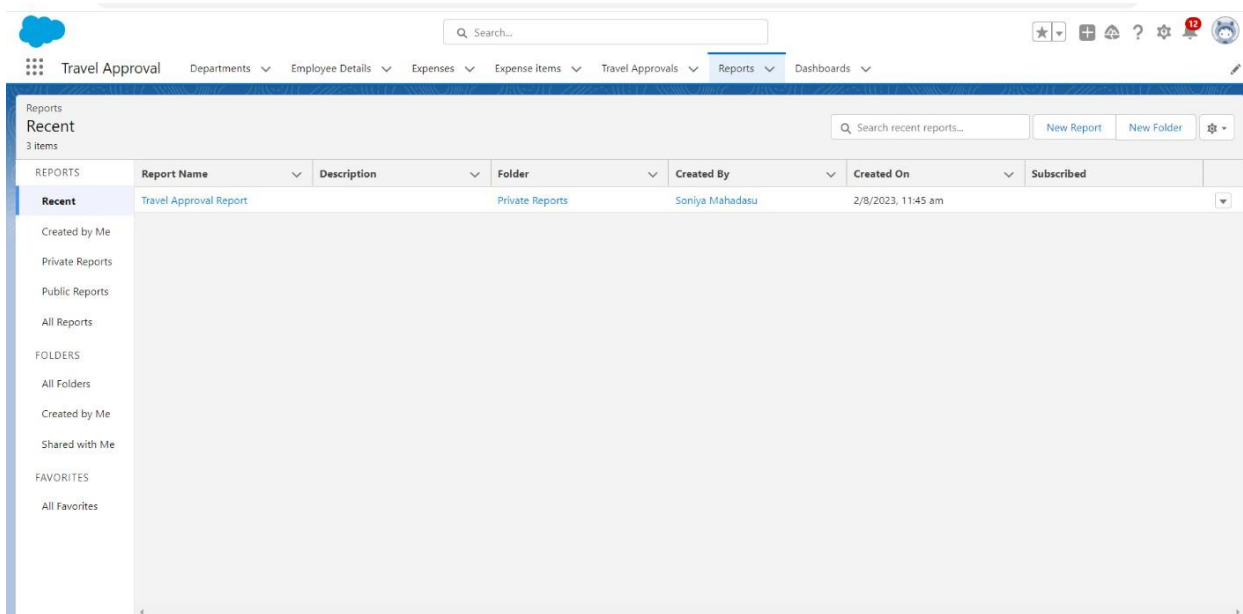
Click on report type as Travel Approval With Departments And click on start report customize your report ,select Department Name click refresh Save and run



At last give the report name as Travel Approval Report,click save

View Report :

click on the app launcher and search as Travel Approval App on the reports tab



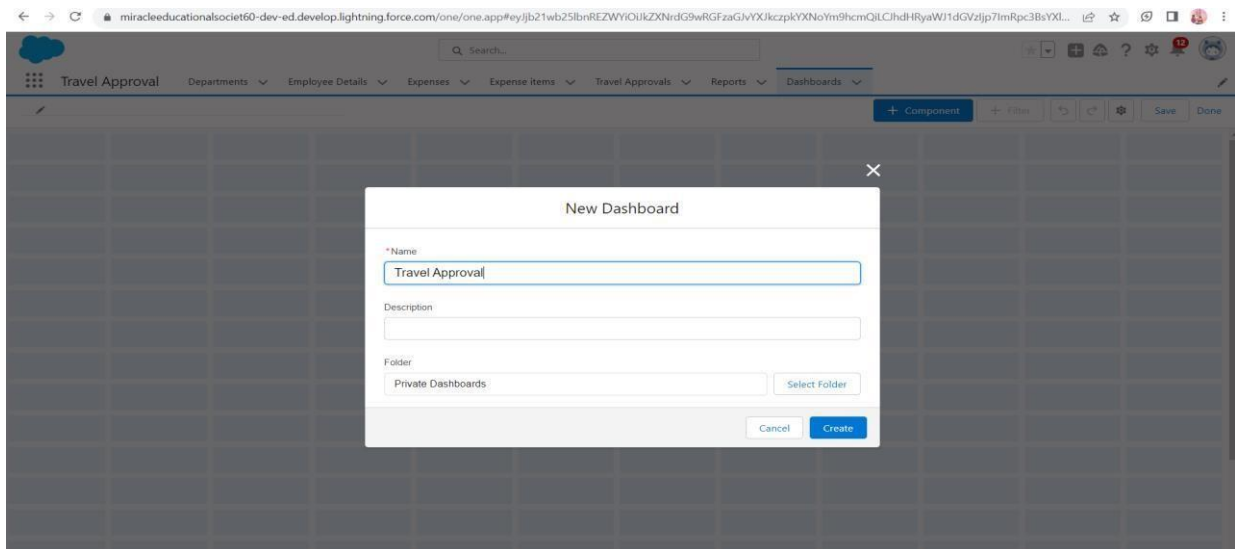
we can check the reports tab

## Step 14

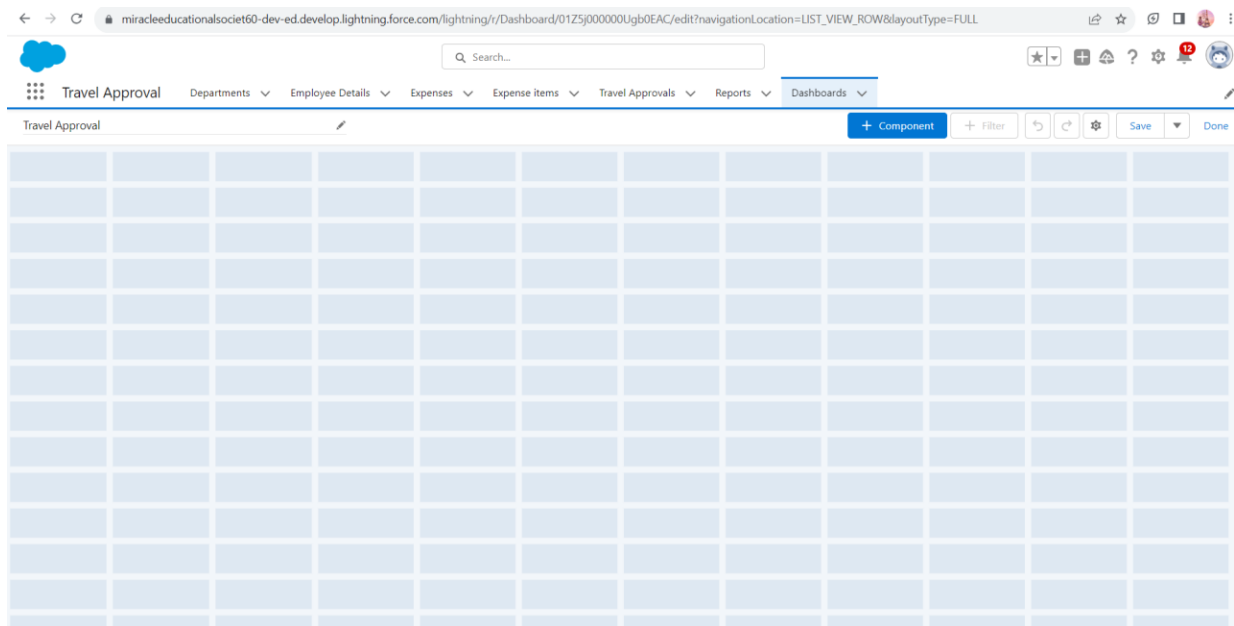
### Create Dashboard

click on the app launcher and search as Travel Approval we click on the dashboard

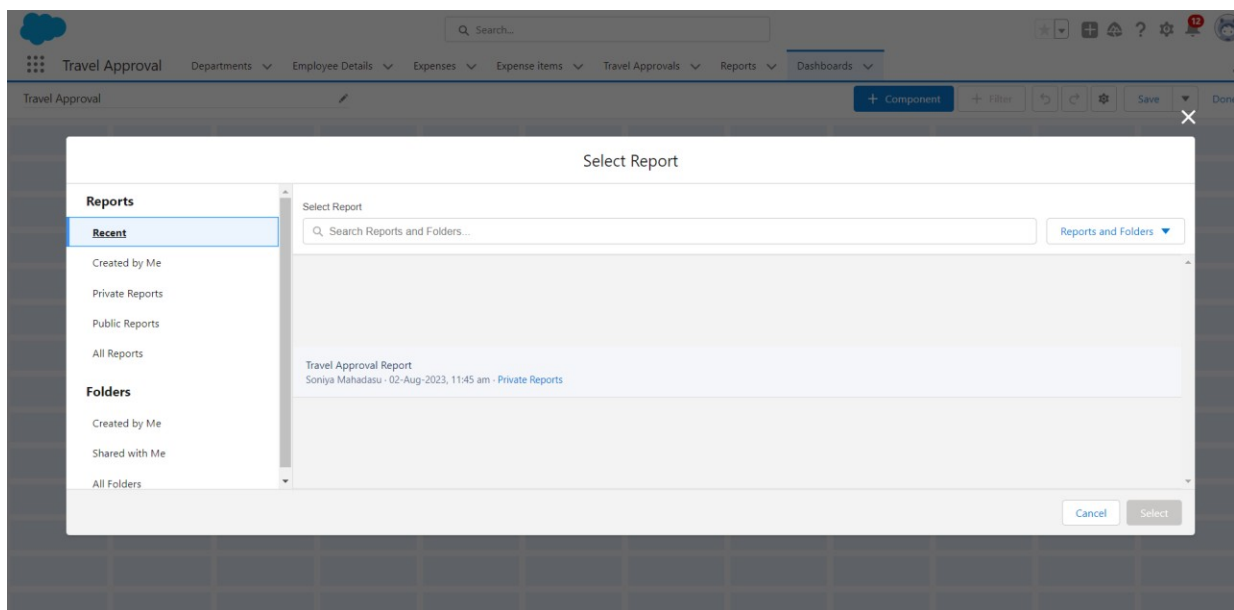
and create a new dashboard with the name of Travel Approval



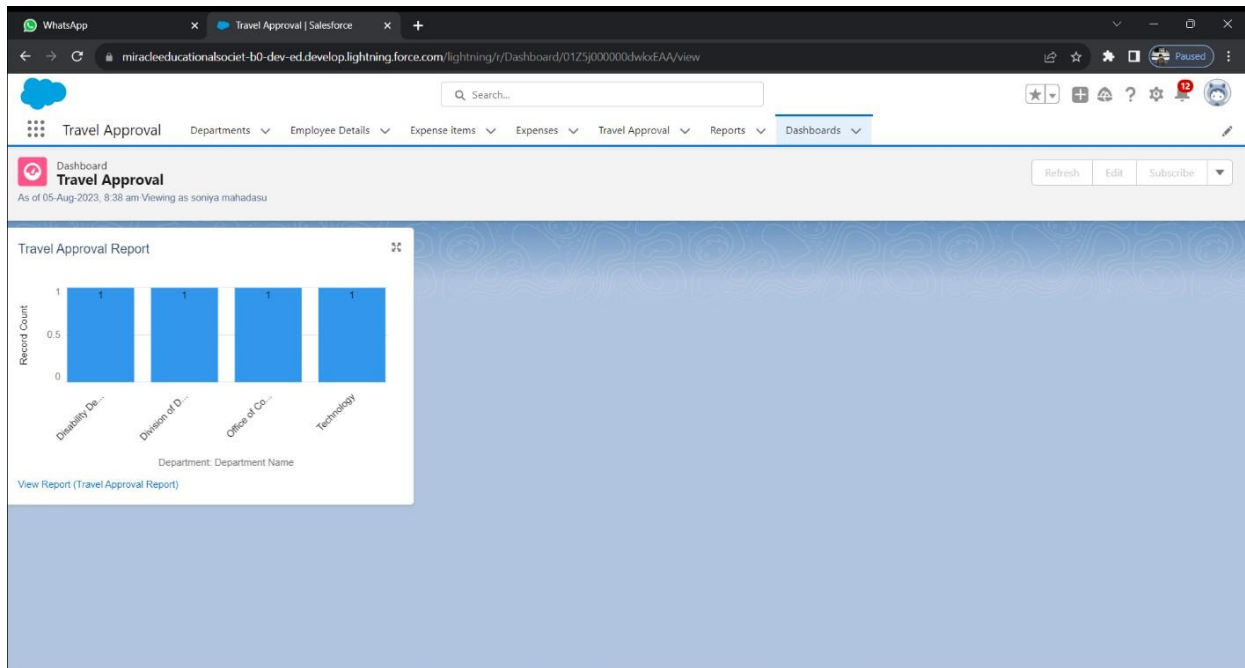
Then we can click on the + component and create a dashboard data



Select Travel Approval Report that you created



Later we click on the report we select the data on the field



Then click on the finish it will be created

## Step 15:

### View Dashboards

click on the app launcher and search as Travel Approval click on the dashboard tab and we can check the dashboards click on Travel Approval and See graph view of records

