


stat

- Data
  - State and Country/Territory Picklists
- Custom Code
  - Static Resources
- Environments
  - Deploy
    - Deployment Status

Didn't find what you're looking for? Try using Global Search.


SETUP Home Create



### Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.


[Get Started](#)



### Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

[Learn More](#)



### Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

[Get Started](#)

| Most Recently Used              |                          |                                 |
|---------------------------------|--------------------------|---------------------------------|
| 10 items                        |                          |                                 |
| NAME                            | TYPE                     | OBJECT                          |
| <a href="#">Travel Approval</a> | Custom Object Definition |                                 |
| <a href="#">Travel Approval</a> | Custom Field Definition  | <a href="#">Travel Approval</a> |

## New Custom Object

### New Custom Object

Help for this Page

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

= Required 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

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
- List View Button Layout
- Restriction Rules
- Scoping Rules

Details

Edit Delete

Description  
I Want travel approval for findng new places

API Name  
Travel\_Approval\_\_c

Custom  
✓

Singular Label  
Travel Approval

Plural Label  
Travel approvals

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

SETUP > OBJECT MANAGER  
**Department**

- 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
- List View Button Layout
- Restriction Rules
- Scoping Rules

**Details**

Edit Delete

Description  
all are called as departments

API Name  
Department\_\_c

Custom  
✓

Singular Label  
Department

Plural Label  
Departments

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window



SETUP > OBJECT MANAGER  
expenses item

- 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
- List View Button Layout
- Restriction Rules
- Scoping Rules

Details

Edit Delete

Description

API Name

expenses\_item\_\_c

Custom

✓

Singular Label

expenses item

Plural Label

expense items

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

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
- List View Button Layout
- Restriction Rules
- Scoping Rules

| Fields & Relationships          |                        |                               |                   |         |
|---------------------------------|------------------------|-------------------------------|-------------------|---------|
| 12 Items, Sorted by Field Label |                        |                               |                   |         |
| FIELD LABEL                     | FIELD NAME             | DATA TYPE                     | CONTROLLING FIELD | INDEXED |
| Air fare                        | Air_fare__c            | Text(60)                      |                   |         |
| Created By                      | CreatedById            | Lookup(User)                  |                   |         |
| Expense type field              | Expense_type_field__c  | Picklist                      |                   |         |
| Last Modified By                | LastModifiedById       | Lookup(User)                  |                   |         |
| Meals                           | Meals__c               | Text(55)                      |                   |         |
| Owner                           | OwnerId                | Lookup(User,Group)            |                   | ✓       |
| Rental cars                     | Rental_cars__c         | Text(60)                      |                   |         |
| Total expense                   | Total_expense__c       | Roll-Up Summary (SUM student) |                   |         |
| Travel Approval                 | Travel_Approval_del__c | Picklist                      |                   |         |
| Travel Approval Name            | Name                   | Auto Number                   |                   | ✓       |

tabs

User Interface

Rename Tabs and Labels

Tabs









Didn't find what you're looking for? Try using Global Search.

SETUP Tabs

## Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

| Custom Object Tabs <span>New</span> <a href="#">What Is This?</a> |                                  |   |  |  |
|---|----------------------------------|---|--|--|
| Action  | Label                            | Tab Style   | Description  |  |
| <a href="#">Edit</a>   <a href="#">Del</a>                        | <a href="#">customers</a>        |  Books       | sales a books 10%offer                                   |  |
| <a href="#">Edit</a>   <a href="#">Del</a>                        | <a href="#">Departments</a>      |  Bank        | STATE BANK OF INDIA OFFER THE DICOUNT FOR THE GOLD LOANS |  |
| <a href="#">Edit</a>   <a href="#">Del</a>                        | <a href="#">expense items</a>    |  Jewel     |  |  |
| <a href="#">Edit</a>   <a href="#">Del</a>                        | <a href="#">properties</a>       |  Laptop    | my itab and labtop sale                                  |  |
| <a href="#">Edit</a>   <a href="#">Del</a>                        | <a href="#">Rentals</a>          |  Car       | my new car   |  |
| <a href="#">Edit</a>   <a href="#">Del</a>                        | <a href="#">students</a>         |  Lightning |  |  |
| <a href="#">Edit</a>   <a href="#">Del</a>                        | <a href="#">Total expenses</a>   |  Big top   |  |  |
| <a href="#">Edit</a>   <a href="#">Del</a>                        | <a href="#">Travel approvals</a> |  Airplane  | I WISH THE TRAVEL IN A AEROPLANE                         |  |

| Web Tabs <span>New</span> <a href="#">What Is This?</a> |  |
|---|--|
| No Web Tabs have been defined                           |  |

| Visualforce Tabs <span>New</span> <a href="#">What Is This?</a> |  |
|---|--|
|---|--|

Data Import Wizard

Recent Import Jobs

| Status | Object     | Records Created | Records Updated | Records Failed | Start Date       | Processing Time (ms) |
|--------|------------|-----------------|-----------------|----------------|------------------|----------------------|
| Closed | Department | 15              | 0               | 1              | 03-25-2023 03:12 | 223                  |
| Open   | Department | 0               | 0               | 0              | 03-25-2023 03:03 | 0                    |
| Open   | Department | 0               | 0               | 0              | 03-25-2023 02:48 | 0                    |
| Open   | Department | 0               | 0               | 0              | 03-25-2023 02:40 | 0                    |
| Open   | Department | 0               | 0               | 0              | 03-25-2023 02:37 | 0                    |

Bulk Api Monitoring



Before you import your data...

**Clean up your data import file**  
You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)

**Make sure your field names match Salesforce field names**  
You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields.](#)


**Don't import too many records at once**  
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Import your data in 3 easy steps!

Launch the Data Import Wizard to import your data.



Didn't find what you're looking for? Try using Global Search.



SETUP

Users

User

Anu Preethi

[User Profile Help for this Page](#)

[Permission Set Assignments \[0\]](#) | 
 [Permission Set Assignments: Activation Required \[0\]](#) | 
 [Permission Set Group Assignments \[0\]](#) | 
 [Permission Set License Assignments \[0\]](#) | 
 [Personal Groups \[0\]](#) | 
 [Public Group Membership \[0\]](#) | 
 [Queue Membership \[0\]](#) | 
 [Team \[0\]](#) | 
 [Managers in the Role Hierarchy \[0\]](#) | 
 [OAuth Connected Apps \[0\]](#) | 
 [Third-Party Account Links \[0\]](#) | 
 [Installed Mobile Apps \[0\]](#) | 
 [Authentication Settings for External Systems \[0\]](#) | 
 [Login History \[10+\]](#) | 
 [User Provisioning Accounts \[0\]](#)

User Detail

Edit

Sharing

Reset Password

Freeze

|   |  |                                      |                                       |
|---|--|--------------------------------------|---------------------------------------|
| Name  | Anu Preethi  | Role                                 |                                       |
| Alias   | apree  | User License                         | Salesforce Platform                   |
| Email   | <a href="mailto:anupreethi589@gmail.com">anupreethi589@gmail.com</a> | Profile                              | Standard Platform User                |
| Username  | anubharath@gmail.com   | Active                               | <input checked="" type="checkbox"/>   |
| Nickname  | User16798233719422675247 ⓘ   | Marketing User                       | <input type="checkbox"/>              |
| Title   |  | Offline User                         | <input type="checkbox"/>              |
| Company   |  | Knowledge User                       | <input type="checkbox"/>              |
| Department  |  | Flow User                            | <input type="checkbox"/>              |
| Division  |  | Service Cloud User                   | <input type="checkbox"/>              |
| Address   |  | Site.com Contributor User            | <input type="checkbox"/>              |
| Time Zone   | (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)              | Site.com Publisher User              | <input type="checkbox"/>              |
| Locale  | English (United States)  | WDC User                             | <input type="checkbox"/>              |
| Language  | English  | Mobile Push Registrations            | <a href="#">View</a>                  |
| Delegated Approver                                |  | Data.com User Type                   | ⓘ                                     |
| Manager   |  | Accessibility Mode (Classic Only)    | <input type="checkbox"/> ⓘ            |
| Receive Approval Request Emails                   | Only if I am an approver   | Debug Mode                           | <input type="checkbox"/> ⓘ            |
| Federation ID                                     |  | High-Contrast Palette on Charts      | <input type="checkbox"/> ⓘ            |
| App Registration: One-Time Password Authenticator | ⓘ  | Load Lightning Pages While Scrolling | <input checked="" type="checkbox"/> ⓘ |
| App Registration: Salesforce Authenticator        | ⓘ  | Salesforce CRM Content User          | <input checked="" type="checkbox"/>   |
| Security Key (U2F or WebAuthn)                    | ⓘ  | Receive Salesforce CRM Content Email | <input checked="" type="checkbox"/>   |

Friday, March 31, 2023

users

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

SETUP Users

|  |   |
|--|---|
| Manager  | Accessibility Mode (Classic Only)                     |
| Receive Approval Request Emails                        | Only if I am an approver                              |
| Federation ID  | Debug Mode  |
| App Registration: One-Time Password Authenticator      | High-Contrast Palette on Charts                       |
| App Registration: Salesforce Authenticator             | Load Lightning Pages While Scrolling                  |
| Security Key (U2F or WebAuthn)                         | Salesforce CRM Content User                           |
| Lightning Login  | Receive Salesforce CRM Content Email Alerts           |
| Temporary Verification Code (Expires in 1 to 24 Hours) | Receive Salesforce CRM Content Alerts as Daily Digest |
| [Generate]   | Make Setup My Default Landing Page                    |
|  | Allow Forecasting                                     |
|  | Call Center   |
|  | Phone   |
|  | Extension   |
|  | Fax   |
|  | Mobile  |
|  | Email Encoding Unicode (UTF-8)                        |
|  | Employee Number                                       |
|  | Used Data Space 0 B [View]                            |
|  | Used File Space 0 B [View]                            |
|  | Last Login 3/26/2023, 2:38 AM                         |
|  | Last Password Change or Reset 3/26/2023, 2:40 AM      |
|  | Failed Login Attempts 9                               |
|  | Individual  |
| Created By ANU PREETHI, 3/26/2023, 2:37 AM             | Modified By Anu Preethi, 3/26/2023, 2:40 AM           |

Edit Sharing Reset Password Freeze

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
- List View Button Layout
- Restriction Rules
- Scoping Rules

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

|             |                    |                     |                 |
|-------------|--------------------|---------------------|-----------------|
| Section     | Expense type field | Rental cars         | trip end date   |
| Blank Space | Last Modified By   | Total expense       | Trip start date |
| Air fare    | Meals              | Travel Approval     |                 |
| Created By  | Owner              | Travel Approval Nan |                 |

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

### Travel Approval Detail

Standard Buttons

Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy

Custom Buttons

Information (Header visible on edit only)

|                      |                 |                  |             |
|----------------------|-----------------|------------------|-------------|
| Travel Approval Name | GEN-2004-001234 | Owner            | Sample Text |
| Travel Approval      | Sample Text     | Last Modified By | Sample Text |
| Expense type field   | Sample Text     |                  |             |
| Total expense        | \$123.45        |                  |             |
| Created By           | Sample Text     |                  |             |
| trip end date        | Sample Text     |                  |             |
| Trip start date      | Sample Text     |                  |             |
| Air fare             | Sample Text     |                  |             |
| Rental cars          | Sample Text     |                  |             |
| Meals                | Sample Text     |                  |             |

System Information (Header visible on edit only)

Object Manager

Travel Approval Validation Rule

[Back to Travel Approval](#)

[Help for this Page](#)

|                         |   |  |                                  |
|-------------------------|---|--|----------------------------------|
| Validation Rule Detail  |   | <a href="#">Edit</a> <a href="#">Clone</a> |                                  |
| Rule Name               | trip_end_date_trip_start_date               | Active                                     | ✓                                |
| Error Condition Formula | trip_end_date__c < Trip_start_date__c       | Error Location                             | trip end date                    |
| Error Message           | trip end date should enter after start date |  |                                  |
| Description             |   |  |                                  |
| Created By              | ANU PREETHI, 3/30/2023, 10:37 PM            | Modified By                                | ANU PREETHI, 3/30/2023, 10:37 PM |
|                         |   | <a href="#">Edit</a> <a href="#">Clone</a> |                                  |



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
- List View Button Layout
- Restriction Rules
- Scoping Rules

Travel Approval Custom Field  
Total expense  
[Back to Travel Approval](#)

Custom Field Definition Detail

|                           |                                  |
|---------------------------|----------------------------------|
| Field Information         |                                  |
| Field Label               | Total expense                    |
| Field Name                | Total_expense                    |
| API Name                  | Total_expense__c                 |
| Description               |                                  |
| Help Text                 |                                  |
| Data Owner                |                                  |
| Field Usage               |                                  |
| Data Sensitivity Level    |                                  |
| Compliance Categorization |                                  |
| Created By                | ANU PREETHI, 3/29/2023, 11:59 PM |
| Modified By               | ANU PREETHI, 3/29/2023, 11:59 PM |

Roll-Up Summary Options

|                    |                      |              |     |
|--------------------|----------------------|--------------|-----|
| Data Type          | Roll-Up Summary      | Summary Type | SUM |
| Summarized Object  | student              |              |     |
| Field to Aggregate | student: 23000567.90 |              |     |
| Filter Criteria    |                      |              |     |

Static Resources | Sale

travel approval | Sales

- Student

Salesforce import of

thanthaiperiyarartsandscinc-dev-ed.develop.lightning.force.com/lightning/setup/StaticResources/page?address=%2F0812w000002CraR

Search Setup

Star

+

Alert

?

Settings

Notifications

Avatar

Setup

Home

Object Manager

stati

Custom Code

Static Resources

Didn't find what you're looking for? Try using Global Search.

Static Resource

statusimage

Help for this Page

Static Resource Detail

Edit

Delete

Where is this used?

|                  |                                 |
|------------------|---------------------------------|
| Name             | statusimage                     |
| Namespace Prefix |                                 |
| Description      |                                 |
| MIME Type        | application/zip                 |
| Cache Control    | Private                         |
| Size             | 163,811 bytes                   |
|                  | <a href="#">View file</a>       |
| Created By       | ANU PREETHI 3/30/2023, 10:05 PM |
| Last Modified By | ANU PREETHI 3/30/2023, 10:05 PM |

Edit

Delete

Where is this used?

Report: Travel approvals  
**New Travel approvals Report**

Enable Field Editing Add Chart Filter Refresh Edit

Total Records  
3

| <input type="checkbox"/> Travel Approval: ID ↑ | Travel Approval: Travel Approval Name |
|--|---------------------------------------|
| <input type="checkbox"/> a072w00000RA4tM (1)   | TA-01003                              |
| Subtotal                                       |                                       |
| <input type="checkbox"/> a072w00000RA5hA (1)   | TA-01004                              |
| Subtotal                                       |                                       |
| <input type="checkbox"/> a072w00000RA5hF (1)   | TA-01005                              |
| Subtotal                                       |                                       |
| Total (3)                                      |                                       |

Report: Departments  
**New Departments Report**

Enable Field Editing Add Chart Edit

Total Records  
17

| Department: ID ↑                             | Department: Department Name |
|--|-----------------------------|
| <input type="checkbox"/> a062w00000POLy8 (1) | NMA-1001                    |
| Subtotal                                     |                             |
| <input type="checkbox"/> a062w00000POLy9 (1) | NMA-1002                    |
| Subtotal                                     |                             |
| <input type="checkbox"/> a062w00000POLyA (1) | NMA-1003                    |
| Subtotal                                     |                             |
| <input type="checkbox"/> a062w00000POLyB (1) | NMA-1004                    |
| Subtotal                                     |                             |
| <input type="checkbox"/> a062w00000POLyC (1) | NMA-1005                    |
| Subtotal                                     |                             |
| <input type="checkbox"/> a062w00000POLyD (1) | NMA-1006                    |
| Subtotal                                     |                             |
| <input type="checkbox"/> a062w00000POLyE (1) | NMA-1007                    |
| Subtotal                                     |                             |
| <input type="checkbox"/> a062w00000POLyF (1) | NMA-1008                    |
| Subtotal                                     |                             |

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒



Dashboards

Private Dashboards

4 items

Search private dashboards...

New Dashboard

New Folder

⚙️ ▼

| DASHBOARDS         | Dashboard Name  | Description | Folder             | Created By  | Created On          | Subscribed |
|--------------------|-----------------|-------------|--------------------|-------------|---------------------|------------|
| Recent             | anu preethi     |             | Private Dashboards | ANU PREETHI | 3/30/2023, 9:37 PM  | ▼          |
| Created by Me      | anu preethi     |             | Private Dashboards | ANU PREETHI | 3/30/2023, 10:48 AM | ▼          |
| Private Dashboards | travel approval |             | Private Dashboards | ANU PREETHI | 3/30/2023, 8:53 PM  | ▼          |
|                    | travel approval |             | Private Dashboards | ANU PREETHI | 3/30/2023, 9:11 PM  | ▼          |
| All Dashboards     |                 |             |                    |             |                     |            |
| FOLDERS            |                 |             |                    |             |                     |            |
| All Folders        |                 |             |                    |             |                     |            |
| Created by Me      |                 |             |                    |             |                     |            |
| Shared with Me     |                 |             |                    |             |                     |            |
| FAVORITES          |                 |             |                    |             |                     |            |
| All Favorites      |                 |             |                    |             |                     |            |

