

# NAAN MUDHALVAN

## SALESFORCE DEVELOPER

**PROJECT TITLE: BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES**

### **TEAM MEMBERS**

GOWSIKA DEVI S T (611220205008)

HARISH S (611220205009) (TEAM LEAD)

PAVISH S (611220205023)

VIGNAYA G S (611220205045)

### **COURSE INSTRUCTOR**

Mr.R.AYYAPPAN

### **COLLEGE SPOC**

Mr.T.KARTHIKEYAN



## **PROJECT GOAL**

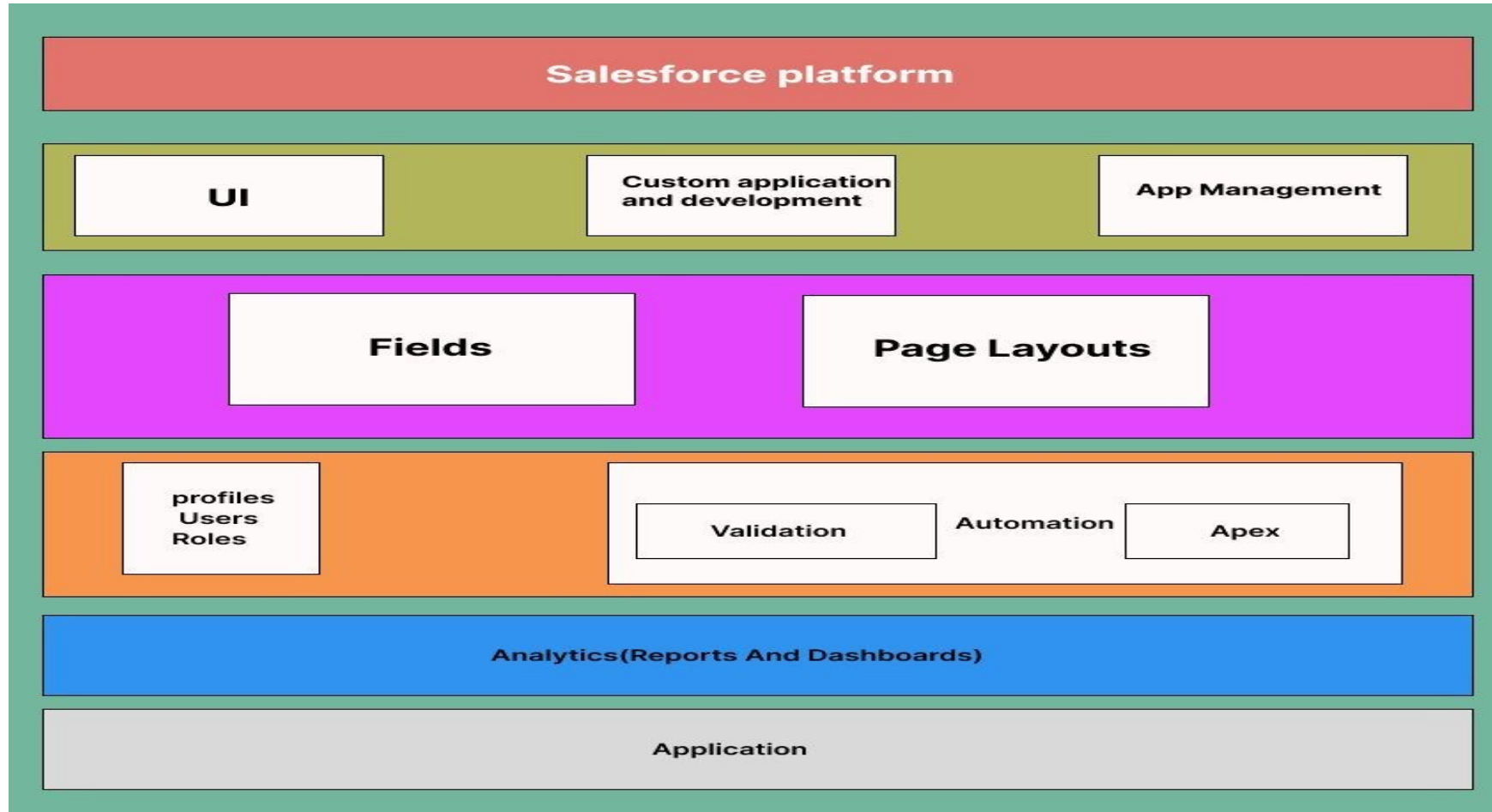
Building an Employee Travel Approval Application for corporate use within the Salesforce platform involves a multi-faceted approach, starting with requirements gathering to define user roles and workflows.

This Project helps in sending your travel approval requests to your manager in place of emails.

## **PROJECT DESCRIPTION**

Create an efficient employee approval app on the Salesforce platform, streamlining corporate workflows & enhancing productivity. Simplify decision-making processes, boost collaboration, and ensure seamless approval cycles for businesses of all sizes.

# TECHNICAL ARCHITECTURE



# SALESFORCE DEVELOPER ORG

The screenshot shows the Salesforce Developer Edition Sign-up page. The left side features a blue background with a white Salesforce logo and a list of benefits: "Build enterprise-quality apps fast to bring your ideas to life". The right side is a white form area with the heading "Sign up for your Salesforce Developer Edition" and a sub-heading "A full-featured copy of the Platform, for free". Below this, a message states: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields are: First Name\* (VIGNAYA), Last Name\* (G S), Email\* (2k20it44@klot.ac.in), Role\* (Developer), and Company\* (Knowledge Institute of Technology).

Developer Edition Sign-up | Sales | +

developer.salesforce.com/signup

**Build enterprise-quality apps fast to bring your ideas to life**

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

**Sign up for your Salesforce Developer Edition**  
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\* VIGNAYA Last Name\* G S

Email\* 2k20it44@klot.ac.in

Role\* Developer

Company\* Knowledge Institute of Technology

The screenshot shows a Gmail inbox with a verification email from Salesforce. The email is titled "Successful Developer Edition Sign-up" and contains a "Verify Account" button. Below the button, it provides a URL to save for easy login: "https://knowledgeinstituteoftech-ba-dev-ed.develop.my.salesforce.com". It also displays the username "vignaya@klot.com" and a welcome message: "Again, welcome to Salesforce!".

Successful Developer Edition Sign-up | Welcome to Salesforce: Verify your account | Change Your Password | Salesforce | +

mail.google.com/mail/u/0/?ogbi#inbox/FMfcgzGwHLfLNLjJNQmftqRjMFHzLCV

**Gmail**

Search in mail

Compose

Inbox 2

Starred

Snoozed

Sent

Drafts

More

Labels +

Click below to verify your account.

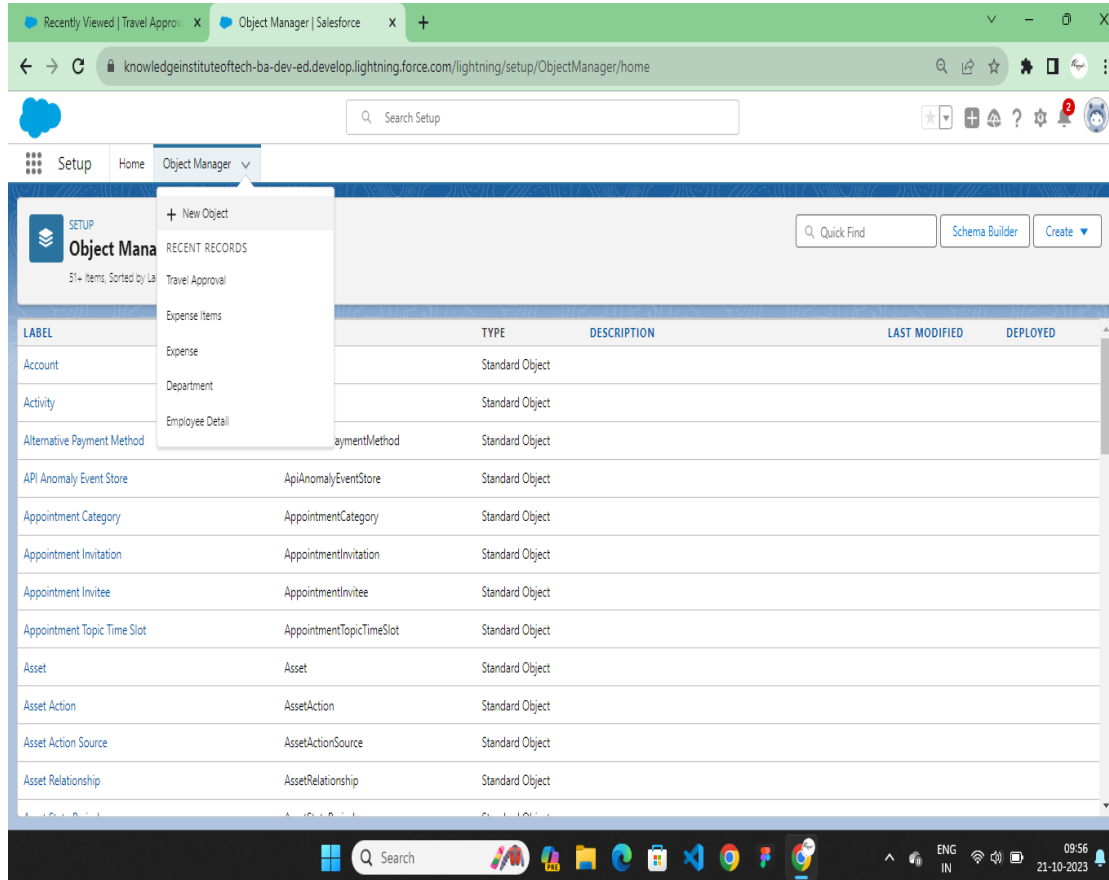
**Verify Account**

To easily log in later, save this URL:  
<https://knowledgeinstituteoftech-ba-dev-ed.develop.my.salesforce.com>

Username:  
[vignaya@klot.com](mailto:vignaya@klot.com)

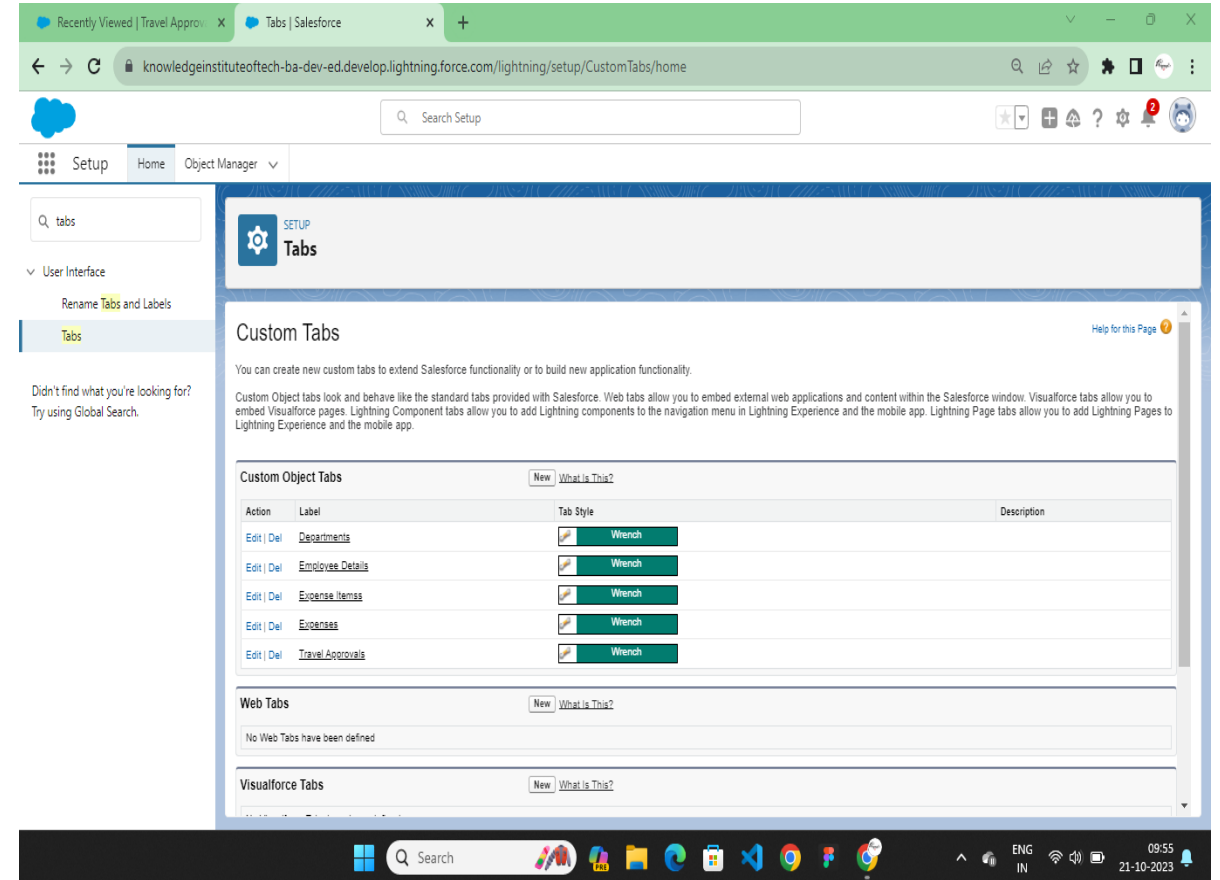
Again, welcome to Salesforce!

# CUSTOM OBJECT CREATION & TABS



The screenshot shows the Salesforce Object Manager setup page. The browser address bar displays the URL: `knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The left sidebar contains a navigation menu with 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' dropdown menu is open, showing options: '+ New Object', 'RECENT RECORDS', 'Expense Items', 'Expense', 'Department', and 'Employee Detail'. The main content area features a search bar labeled 'Quick Find' and a 'Create' button. Below this is a table listing various objects.

LABEL	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Standard Object			
Activity	Standard Object			
Alternative Payment Method	Standard Object			
API Anomaly Event Store	Standard Object			
Appointment Category	Standard Object			
Appointment Invitation	Standard Object			
Appointment Invitee	Standard Object			
Appointment Topic Time Slot	Standard Object			
Asset	Standard Object			
Asset Action	Standard Object			
Asset Action Source	Standard Object			
Asset Relationship	Standard Object			



The screenshot shows the Salesforce Custom Tabs setup page. The browser address bar displays the URL: `knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home`. The left sidebar contains a navigation menu with 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' dropdown menu is open, showing options: '+ New Object', 'RECENT RECORDS', 'Expense Items', 'Expense', 'Department', and 'Employee Detail'. The main content area features a search bar labeled 'Quick Find' and a 'Create' button. Below this is a table listing various objects.

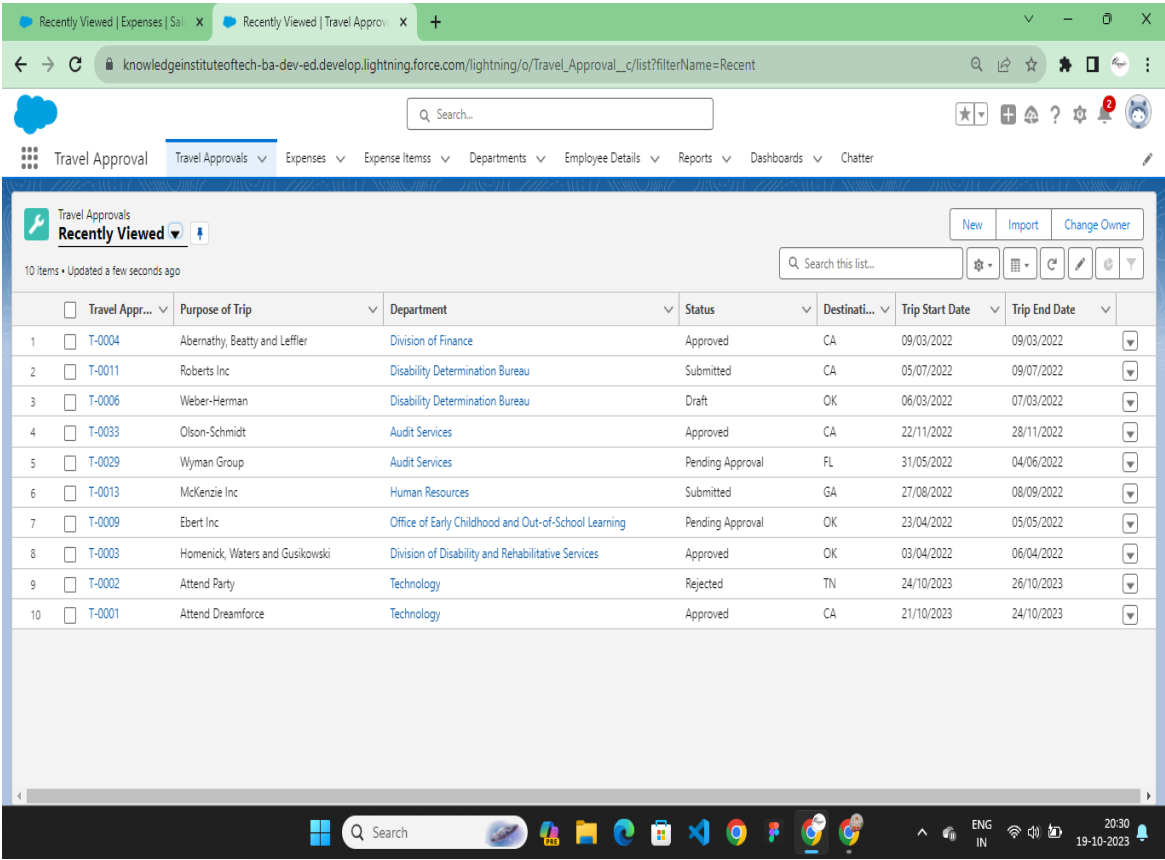
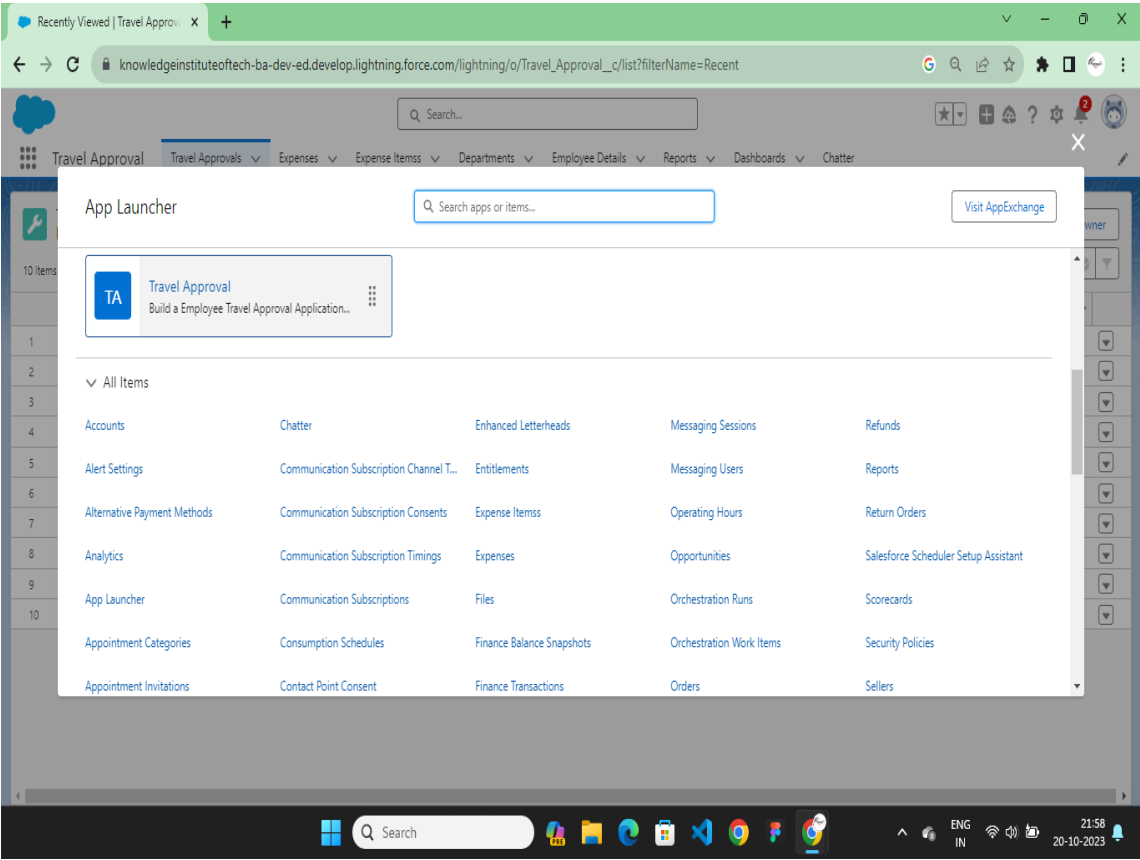
Custom Tabs

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.

Action	Label	Tab Style	Description
Edit   Del	Departments	Wrench	
Edit   Del	Employee Details	Wrench	
Edit   Del	Expense Items	Wrench	
Edit   Del	Expenses	Wrench	
Edit   Del	Travel Approvals	Wrench	

# LIGHTNING APP



# USER CREATION

Recently Viewed | Employee De: x Users | Salesforce x +

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055J0000AqLbc%3Fnoiredirect%3D1%26isUs...

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

SETUP Users

User Eric Executive

Permission Set Assignments | Permission Set Assignments: Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Memberships | Queue Memberships | Team | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

Edit Sharing Reset Password Freeze

Name	Eric Executive	Role	CEO
Alias	eeexec	User License	Salesforce
Email	sakthivignava06@gmail.com (Verify)	Profile	System Administrator
Username	executive@ceo.com	Active	<input checked="" type="checkbox"/>
Nickname	eric.exec	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+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

Recently Viewed | Employee De: x Users | Salesforce x +

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055J0000AJcel%2Fe%3FisUserEntityOverride...

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

SETUP Users

Country IN

Single Sign On Information

Federation ID

Locale Settings

Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)

Locale English (India)

Language English

Approver Settings

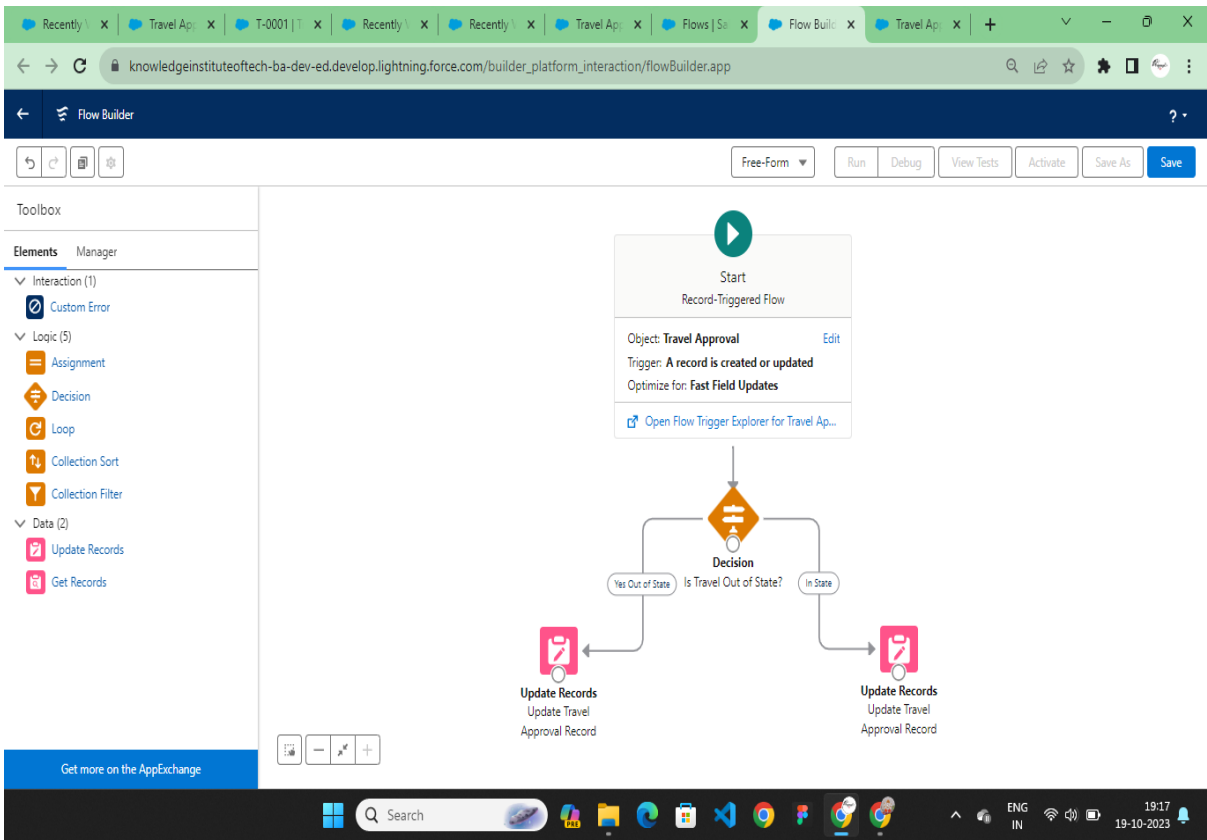
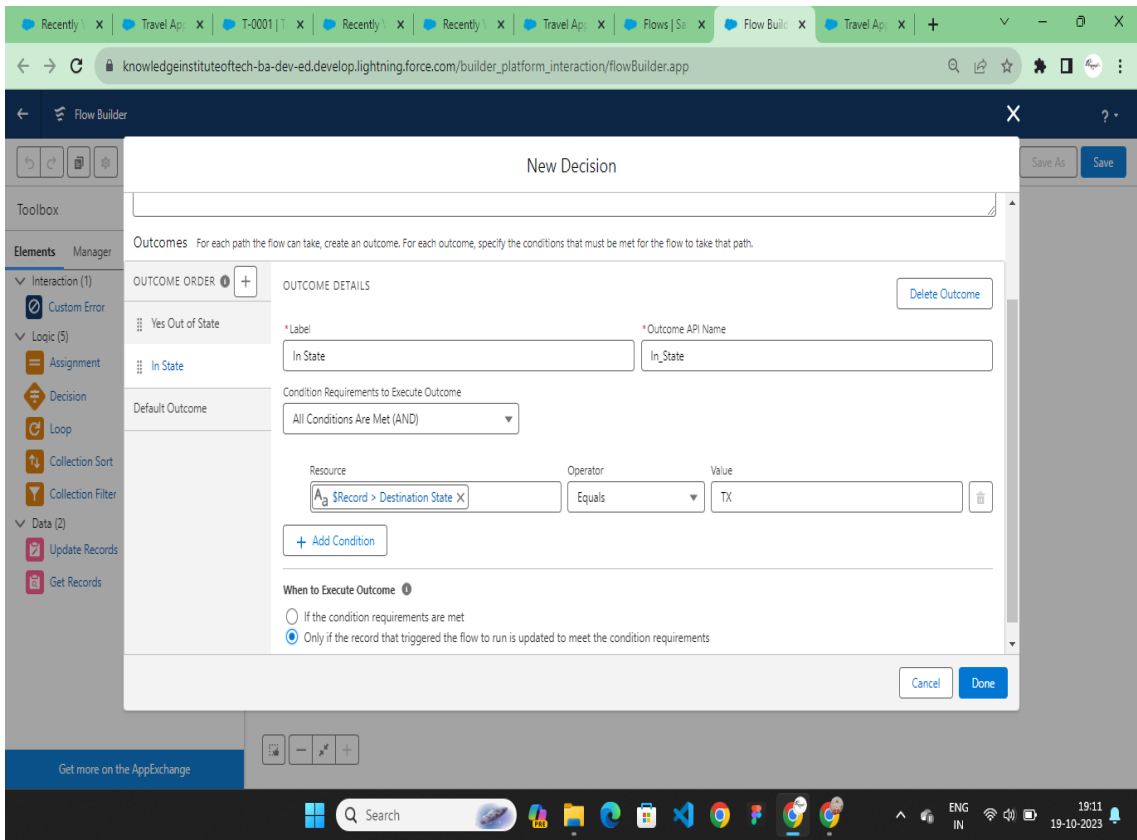
Delegated Approver

Manager Eric Executive

Receive Approval Request Emails Only if I am an approver

Save Save & New Cancel

# FLOWS





# APPROVAL PROCESS

Recently x Travel Ap: x T-0001 | x Recently x Recently x Travel Ap: x Approval x Out of Stu x Travel Ap: x + -

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04a%2Fe%3DQUICK\_CREATE...

Search Setup

Setup Home Object Manager

process

Feature Settings

Marketing

Lead Processes

Sales

Sales Processes

Service

Entitlement Management

Entitlement Processes

Support Processes

Process Automation

Approval Processes

Automation Home (Beta)

Flows

Migrate to Flow

Next Best Action

Paused And Failed Flow Interviews

Post Templates

**SETUP**

**Approval Processes**

Name: Travel Approval Request

Unique Name: Travel\_Approval\_Request

Approval Assignment Email Template:

Add the Submit for Approval button and Approval History related list to all Travel Approval page layouts

Specify Entry Criteria

Use this approval process if the following criteria are met:

Field	Operator	Value	
Travel Approval: Total Expenses	greater than	0	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Add Filter Logic

Select Approver

Using the options 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.

Recently x Travel Ap: x T-0001 | x Recently x Recently x Travel Ap: x Approval x Out of Stu x Travel Ap: x + -

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2Fp%2Fprocess%2FprocessNodeWizar...

Search Setup

Setup Home Object Manager

process

Feature Settings

Marketing

Lead Processes

Sales

Sales Processes

Service

Entitlement Management

Entitlement Processes

Support Processes

Process Automation

Approval Processes

Automation Home (Beta)

Flows

Migrate to Flow

Next Best Action

Paused And Failed Flow Interviews

Post Templates

**SETUP**

**Approval Processes**

Previous Save Cancel

Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.

Previous Approval Step Information	
Step Number:	1
Name:	Step 1
Criteria:	
Assign To:	Manager

Select Approver

☐ Let the submitter choose the approver manually.

☐ Automatically assign using the user field selected earlier: (Manager)

☐ Automatically assign to queue.

☒ Automatically assign to approver(s).

User: VIGNAYA G S

Add Row Remove Row

When multiple approvers are selected:

☒ Approve or reject based on the FIRST response.

☐ Require UNANIMOUS approval from all selected approvers.

☐ The approver's delegate may also approve this request.

Reject Behavior

# TRAVEL APPROVAL APPLICATION

Recent: x Travel: x T-0001 x Recent: x Recent: x Travel: x Approv: x T-0001 x Out of: x Travel: x + -

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/r/Travel\_Approval\_\_c/a045j00000LNCdBAAX/view

Travel Approval

Travel Approvals Expenses Expense Items Departments Employee Details Reports Dashboards Chatter

Travel Approval T-0001

+ Follow Edit New Contact New Opportunity

Expense Items Name Expense Type Amount

Airfare Airfare ₹450.00

Hotel Hotel ₹870.00

View All

Approval History (2)

Step Name Date Status Assigned To

Step 1 19/10/2023, 7:41 pm Pending Eric Executive

Approval Request Submitted 19/10/2023, 7:41 pm Submitted VIGNAVA G S

View All

Share an update... Share

Search this feed...

VIGNAVA G S 57m ago

@Eric\_Executive Which department should I associate this travel request with?

1 comment • 1 view

Like Comment

Eric Executive likes this.

Eric Executive an hour ago

Technology is the correct department.

Like

Write a comment...

javascriptvoid(0)

Recently Viewed | Expenses | Sai x Recently Viewed | Travel Approv x + -

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/o/Travel\_Approval\_\_c/list?filterName=Recent

Travel Approval

Travel Approvals Expenses Expense Items Departments Employee Details Reports Dashboards Chatter

Travel Approvals Recently Viewed

New Import Change Owner

10 Items • Updated a few seconds ago

Search this list...

Travel Appr... Purpose of Trip Department Status Destinati... Trip Start Date Trip End Date

1 T-0004 Abernathy, Beatty and Leffler Division of Finance Approved CA 09/03/2022 09/03/2022

2 T-0011 Roberts Inc Disability Determination Bureau Submitted CA 05/07/2022 09/07/2022

3 T-0006 Weber-Herman Disability Determination Bureau Draft OK 06/03/2022 07/03/2022

4 T-0033 Olson-Schmidt Audit Services Approved CA 22/11/2022 28/11/2022

5 T-0029 Wyman Group Audit Services Pending Approval FL 31/05/2022 04/06/2022

6 T-0013 McKenzie Inc Human Resources Submitted GA 27/08/2022 08/09/2022

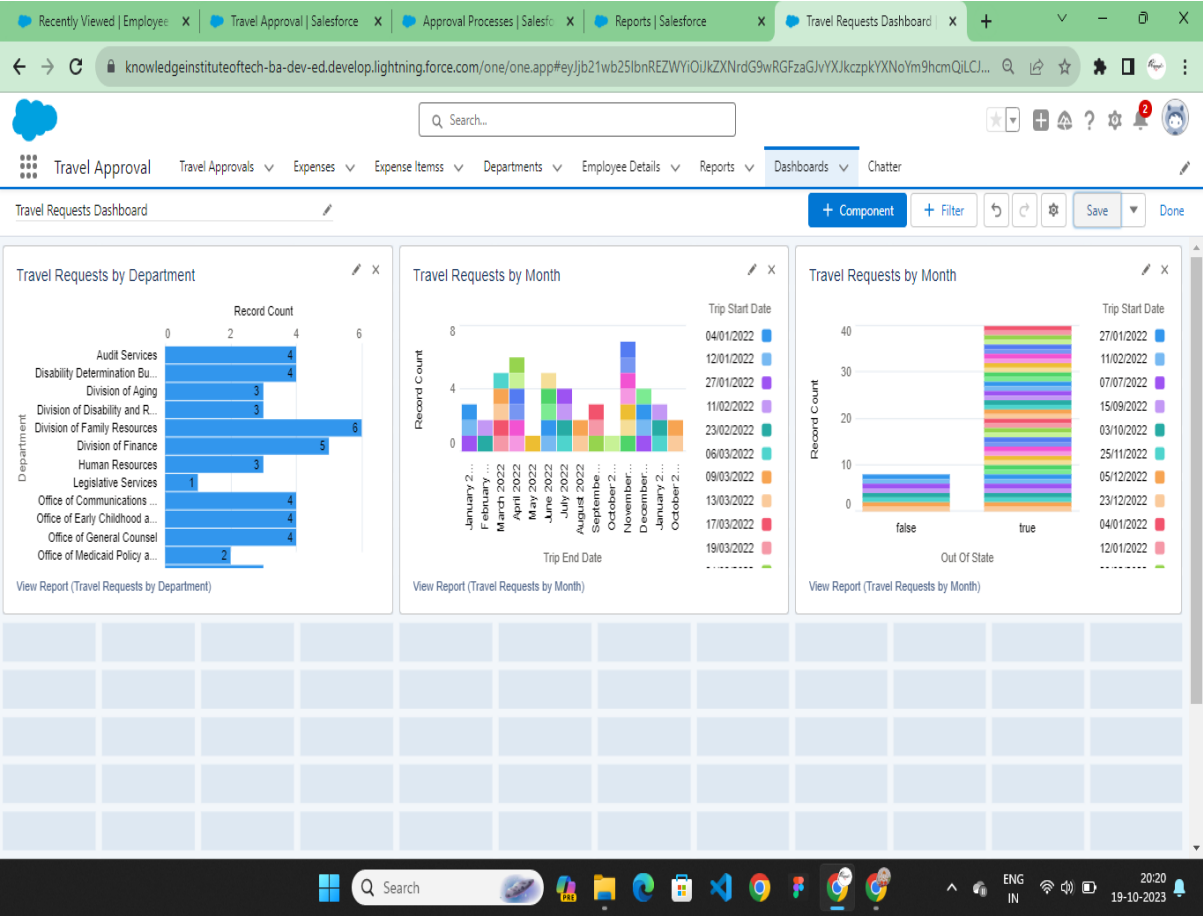
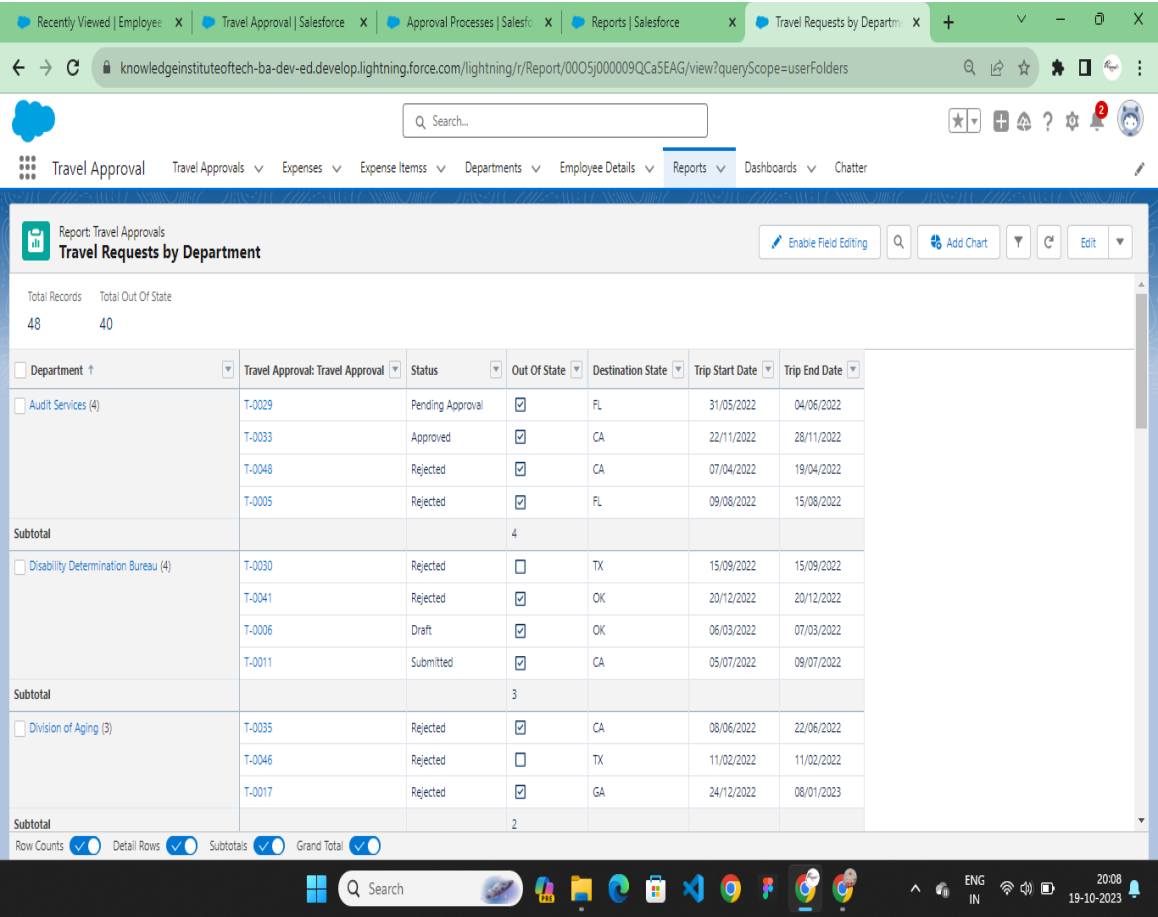
7 T-0009 Ebert Inc Office of Early Childhood and Out-of-School Learning Pending Approval OK 23/04/2022 05/05/2022

8 T-0003 Homenick, Waters and Gusikowski Division of Disability and Rehabilitative Services Approved OK 03/04/2022 06/04/2022

9 T-0002 Attend Party Technology Rejected TN 24/10/2023 26/10/2023

10 T-0001 Attend Dreamforce Technology Approved CA 21/10/2023 24/10/2023

# REPORTS AND DASHBOARD





**THANK YOU**