

# **NAAN MUDHALVAN**

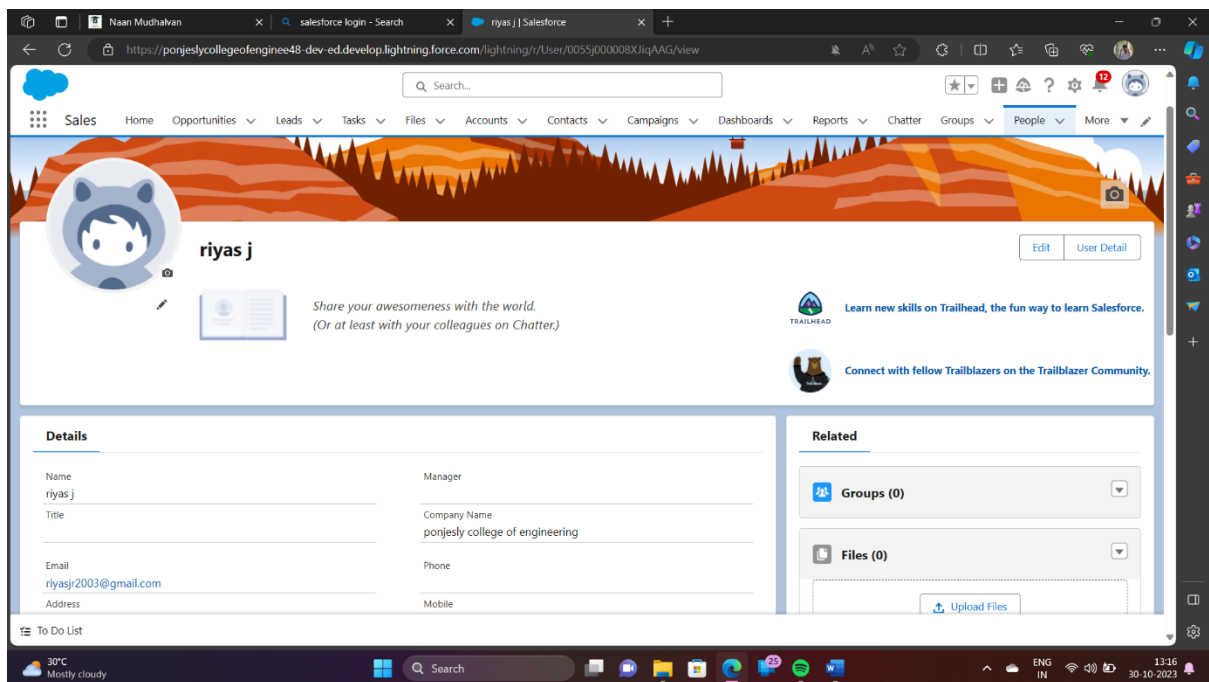
## **SALESFORCE PROJECT REPORT**

**COLLEGE : PONJESLY COLLEGE OF ENGINEERING**

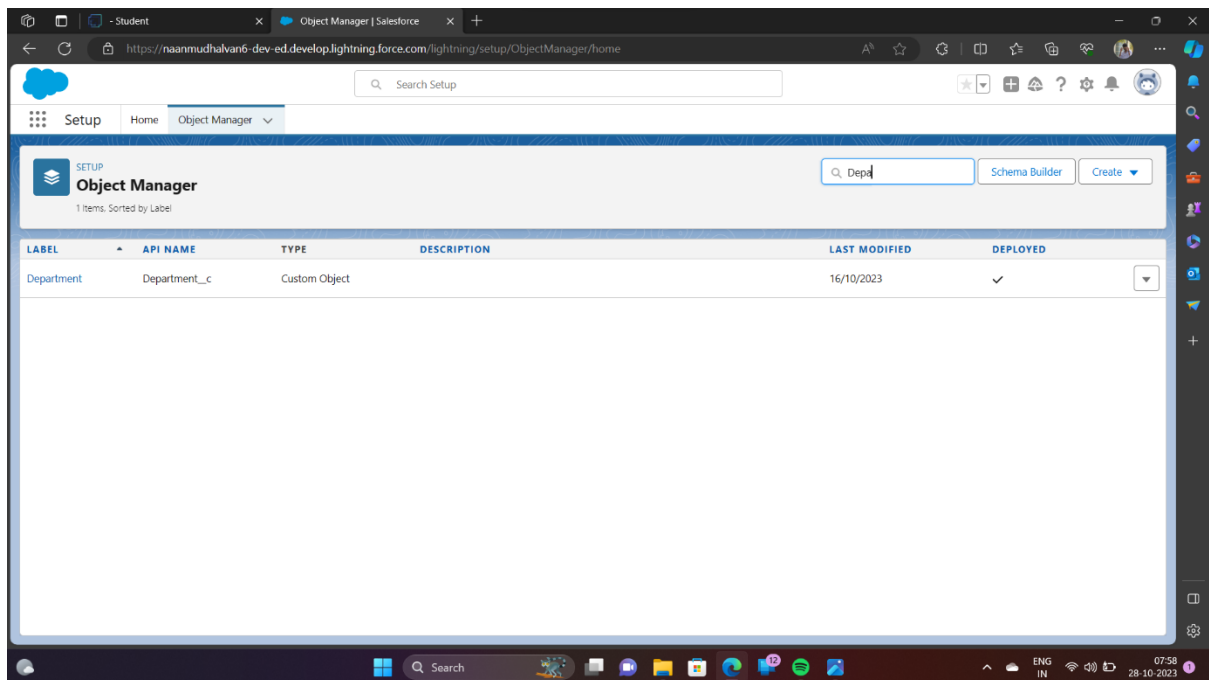
**BATCH-15**

| <b>NAME</b> | <b>NM ID</b>                     | <b>REG NO</b> |
|-------------|----------------------------------|---------------|
| RIYAS.J     | A7A9386E22B02849AD74A7A5ADB953B0 | 961820114059  |

## Step 1: Create a Salesforce Account



## Step 2: Create the objects (Department, Employee Detail, Expense, Expense Items, Travel Approval)



Object Manager | Salesforce

Search Setup

Setup Home Object Manager

Object Manager

1 item. Sorted by Label

Expense

| LABEL   | API NAME   | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|---------|------------|---------------|-------------|---------------|----------|
| Expense | Expense__c | Custom Object |             | 28/10/2023    | ✓        |

80°F Partly sunny

Object Manager | Salesforce

Search Setup

Setup Home Object Manager

Object Manager

1 item. Sorted by Label

Employee Detail

| LABEL           | API NAME           | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|-----------------|--------------------|---------------|-------------|---------------|----------|
| Employee Detail | Employee_Detail__c | Custom Object |             | 28/10/2023    | ✓        |

80°F Partly sunny

Object Manager | Salesforce

Search Setup

Setup Home Object Manager

Object Manager

1 Items. Sorted by Label

Expe Schema Builder Create

| LABEL      | API NAME      | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|------------|---------------|---------------|-------------|---------------|----------|
| Expen Item | Expen Item__c | Custom Object |             | 16/10/2023    | ✓        |

80°F Partly sunny

Object Manager | Salesforce

Search Setup

Setup Home Object Manager

Object Manager

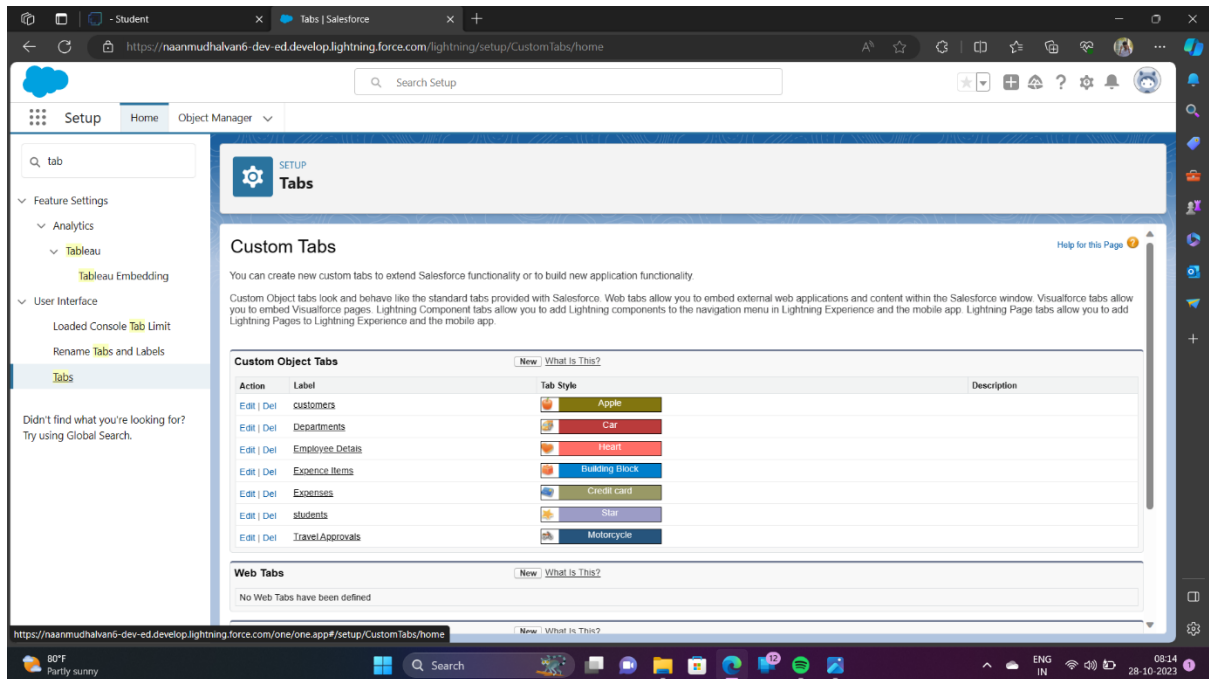
1 Items. Sorted by Label

Trav Schema Builder Create

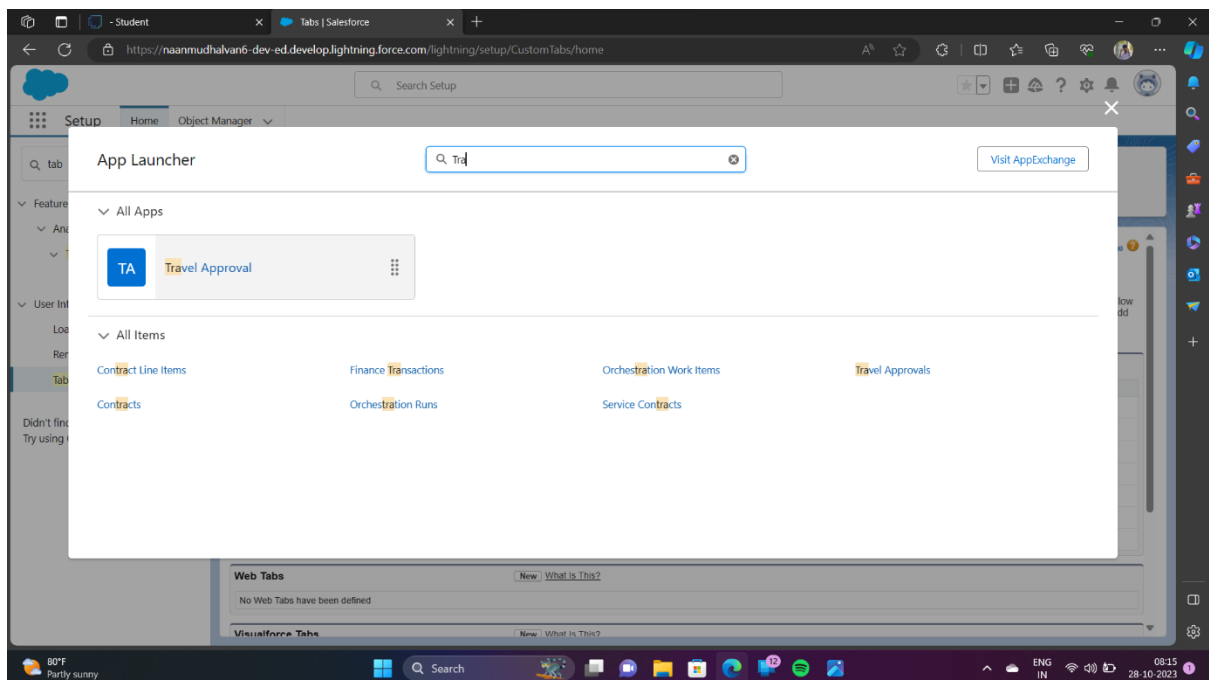
| LABEL           | API NAME           | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|-----------------|--------------------|---------------|-------------|---------------|----------|
| Travel Approval | Travel Approval__c | Custom Object |             | 16/10/2023    | ✓        |

80°F Partly sunny

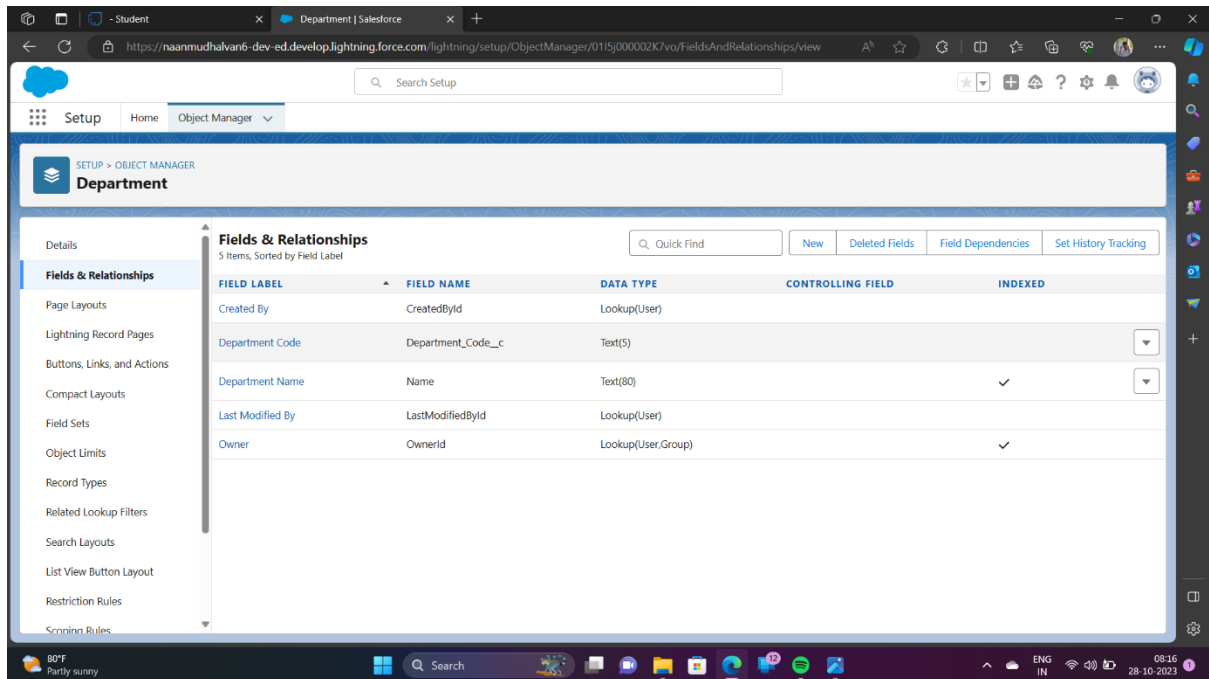
### Step 3: Create the Tabs for each objects (Department, Employee Detail, Expense, Expense Items, Travel Approval)



### Step 4: Create a Lightning App

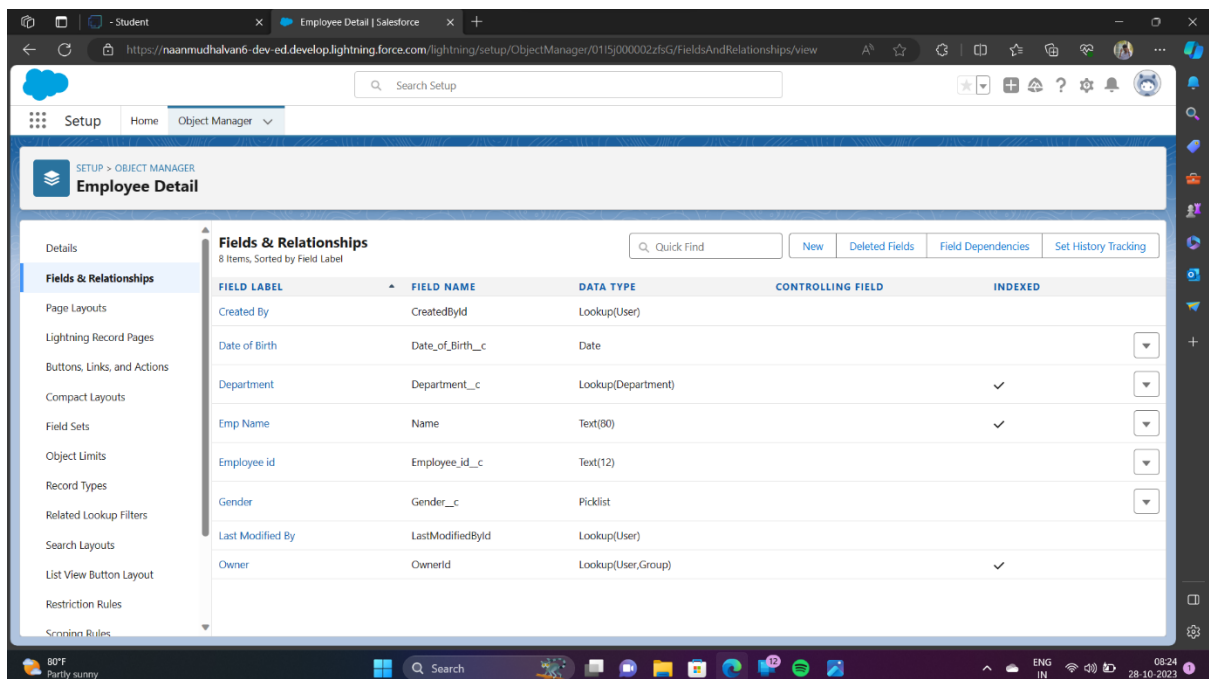


## Step 5: Create the Fields & Relationship for each objects (Department, Employee Detail, Expense, Expense Items, Travel Approval)



The screenshot shows the Salesforce Setup interface for the 'Department' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. There are 5 items listed, sorted by Field Label.

| FIELD LABEL      | FIELD NAME         | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|--------------------|--------------------|-------------------|---------|
| Created By       | CreatedById        | Lookup(User)       |                   |         |
| Department Code  | Department_Code__c | Text(5)            |                   |         |
| Department Name  | Name               | Text(80)           |                   | ✓       |
| Last Modified By | LastModifiedById   | Lookup(User)       |                   |         |
| Owner            | OwnerId            | Lookup(User,Group) |                   | ✓       |



The screenshot shows the Salesforce Setup interface for the 'Employee Detail' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. There are 8 items listed, sorted by Field Label.

| FIELD LABEL      | FIELD NAME       | DATA TYPE          | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Created By       | CreatedById      | Lookup(User)       |                   |         |
| Date of Birth    | Date_of_Birth__c | Date               |                   |         |
| Department       | Department__c    | Lookup(Department) |                   | ✓       |
| Emp Name         | Name             | Text(80)           |                   | ✓       |
| Employee id      | Employee_id__c   | Text(12)           |                   |         |
| Gender           | Gender__c        | Picklist           |                   |         |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |         |
| Owner            | OwnerId          | Lookup(User,Group) |                   | ✓       |

Salesforce Setup Page for "Expense Item" object.

Navigation: Setup > Object Manager > Expense Item

Fields & Relationships (6 items, Sorted by Field Label)

| FIELD LABEL       | FIELD NAME         | DATA TYPE                      | CONTROLLING FIELD | INDEXED |
|-------------------|--------------------|--------------------------------|-------------------|---------|
| Created By        | CreatedById        | Lookup(User)                   |                   |         |
| Expense Item Name | Name               | Text(80)                       |                   | ✓       |
| Expense           | Expense__c         | Master-Detail(Expense)         |                   | ✓       |
| Expense Type      | Expense_Type__c    | Picklist                       |                   |         |
| Last Modified By  | LastModifiedById   | Lookup(User)                   |                   |         |
| Travel Approval   | Travel_Approval__c | Master-Detail(Travel Approval) |                   | ✓       |

Salesforce Setup Page for "Expense" object.

Navigation: Setup > Object Manager > Expense

Fields & Relationships (5 items, Sorted by Field Label)

| FIELD LABEL      | FIELD NAME         | DATA TYPE               | CONTROLLING FIELD | INDEXED |
|------------------|--------------------|-------------------------|-------------------|---------|
| Created By       | CreatedById        | Lookup(User)            |                   |         |
| Employee Detail  | Employee_Detail__c | Lookup(Employee Detail) |                   | ✓       |
| Expense Name     | Name               | Text(80)                |                   | ✓       |
| Last Modified By | LastModifiedById   | Lookup(User)            |                   |         |
| Owner            | OwnerId            | Lookup(User,Group)      |                   | ✓       |

Setup

Home

Object Manager

Search Setup

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

Screening Rules

Fields & Relationships

13 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

|                      |                      |                                    |   |
|----------------------|----------------------|------------------------------------|---|
| Amount               | Amount__c            | Currency(10, 0)                    |   |
| Created By           | CreatedById          | Lookup(User)                       |   |
| Destination state    | Destination_state__c | Text(40)                           |   |
| Employee Detail      | Employee_Detail__c   | Lookup(Employee Detail)            | ✓ |
| Last Modified By     | LastModifiedById     | Lookup(User)                       |   |
| Out-of-state         | Out_of_state__c      | Checkbox                           |   |
| Purpose of trip      | Purpose_of_trip__c   | Text(255)                          |   |
| Status               | Status__c            | Picklist                           |   |
| Total Expenses       | Total_Expenses__c    | Roll-Up Summary (MIN Expense Item) |   |
| Travel Approval Name | Name                 | Text(80)                           | ✓ |

81°F  
Partly sunny

Search

ENG  
IN

08:47  
28-10-2023