

Phase 6: User Interface Development

1. Create a Custom Object – Travel Request:

Object Name: Travel Request

API Name: Travel_Request__c

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A new custom object is being created with the following details:

- Label:** Travel Request (Example: Account)
- Plural Label:** Travel Requests (Example: Accounts)
- Object Name:** Travel_Request (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (radio button selected)
- Content Name:** None
- Record Name Label and Format:** Record Name: Travel Request Name (Example: Account Name)
- Data Type:** Text (Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.)

Fields & Relationships:

1. Status

- Type: Picklist
- Values: Pending, Approved, and Rejected.

2. Start Date

- Type: Date

3. End Date

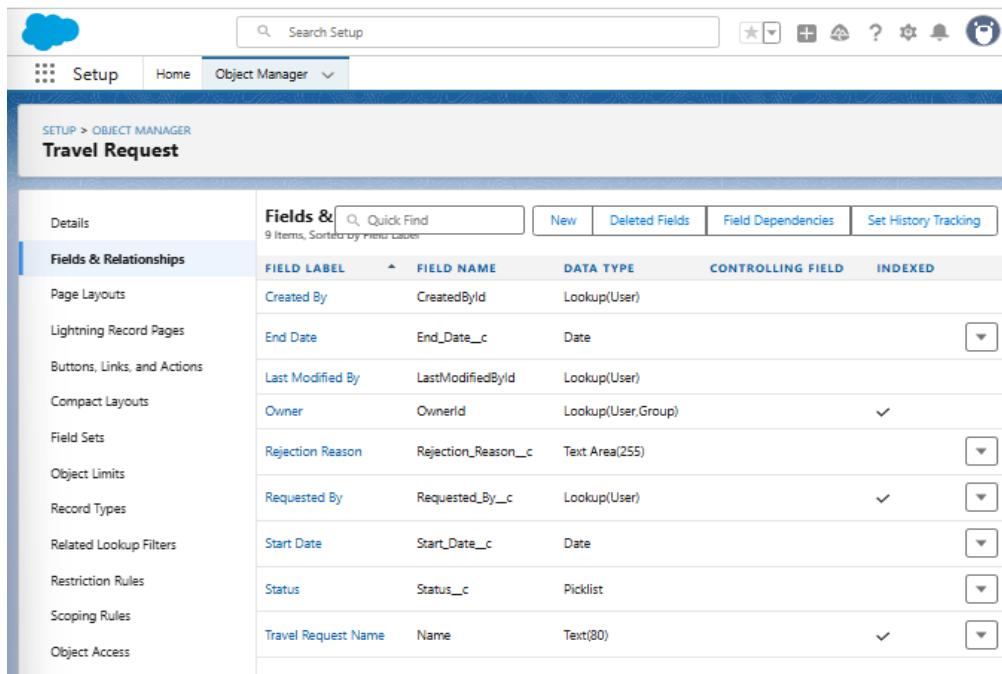
- Type: Date

4. Requested By

- Type: Lookup (User)

5. Rejection Reason

- Type: Text Area



The screenshot shows the Salesforce Object Manager interface for the 'Travel Request' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, and Object Access. The main area is titled 'Fields & Relationships' and displays a table of fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Rejection Reason	Rejection_Reason__c	Text Area(255)		
Requested By	Requested_By__c	Lookup(User)	✓	
Start Date	Start_Date__c	Date		
Status	Status__c	Picklist		
Travel Request Name	Name	Text(80)	✓	

Page Layout:

- After creating the fields, add them to the **Page Layout**.
- Page Layout controls which fields users can see or edit when viewing or creating a Travel Request record.
- Make sure **Status, Start Date, End Date, Requested By, and Rejection Reason** are visible.

2. Add a Tab:

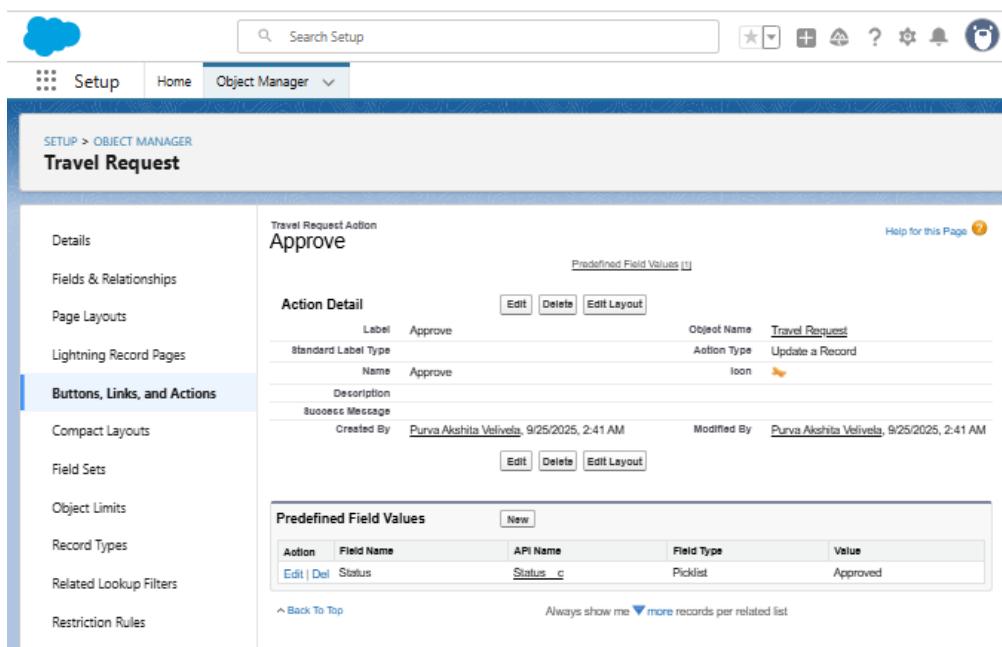
- Setup → Tabs → New → Custom Object Tab → Travel Requests
- Add the tab to your custom app or Sales/Service app via App Manager → Edit App → Navigation Items → Add Travel Requests.

Action	Label	Tab Style	Description
Edit Del	Bookings		
Edit Del	Mentor		create Mentor object
Edit Del	Payments		
Edit Del	Students		
Edit Del	Students		
Edit Del	Travelers		
Edit Del	Travel Requests		
Edit Del	Trip		

3. Approve and Reject actions

Approve:

- Go to Object Manager → Travel Request → Buttons, Links, and Actions → New Action
- Action Type: Update a Record
- Name: Approve
- Predefine Status = Approved



Reject:

- Predefine Status = Rejected
- Include Rejection Reason field in the layout
- Add both actions to the Record Page Layout → Salesforce Mobile and Lightning Experience Actions section

The screenshot shows the Salesforce Setup interface under the Object Manager for the Travel Request object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and more. The 'Buttons, Links, and Actions' category is selected. In the main content area, a specific action named 'Reject' is being edited. The action details include a label 'Reject', standard label type 'Reject', object name 'Travel Request', and action type 'Update a Record'. There is also a success message and a creation/modification history. Below the action details is a 'Predefined Field Values' section with a table for defining field values for this action.

4. Displaying Actions:

Step 1: Open Lightning App Builder

1. In Salesforce, click the gear icon (⚙️) → select Setup.
2. In the Quick Find box, type Lightning App Builder → click it.

Step 2: Create a New Record Page

1. Click New in the Lightning App Builder.
2. Choose Record Page
3. Give it a Label: Travel Request Record Page.
4. Select the Object: Travel Request.
5. Choose a Page Template: start with Header and One Column for simplicity.
6. Click Finish.

Step 3: Add Components to the Page

- Highlights Panel → top region.
- Record Detail → middle region
- Related Lists → bottom region

2. Click the Highlights Panel on the canvas.
3. In the right-hand properties panel, enable Upgrade to Dynamic Actions if prompted.
4. choose Start from Scratch.

Step 4: Add Approve & Reject Buttons

1. With Dynamic Actions enabled, scroll to the Actions section in the right-hand panel.
2. Click Add Action → search for Approve → select it.
3. Click Add Action again → search for Reject → select it.

Step 5: Save & Activate

1. Click Save
2. Click Activate.
3. Choose Assign as Org Default
4. Confirm and click Save.

Step 6: Test the Page

1. Go to App Launcher → search for Travel Requests → open the tab.
2. Open any Travel Request record.
3. At the top (Highlights Panel), verify that Approve and Reject buttons appear.

The screenshot shows a Salesforce interface for a Travel Request. The top navigation bar includes links for Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, Students, Travel Requests (which is currently selected), and More. A search bar is at the top right. The main content area displays a travel request record with the following details:

Travel Request Name	Owner
For a travel leave	Purva Akshita Velivelai
Status	Approved
Start Date	9/26/2025
End Date	9/30/2025
Requested By	Ajay
Rejection Reason	(empty)
Created By	Purva Akshita Velivelai, 9/25/2025, 3:28 AM
Last Modified By	Purva Akshita Velivelai, 9/25/2025, 3:29 AM

At the bottom right of the record view, there are 'Approve' and 'Reject' buttons.

Step 7: Test functionality

- o Click Approve → Status updates to Approved.
- o Click Reject → optionally enter a Rejection Reason → Status updates to Rejected