

Project Title:Employee-travel approval application for corporates

1.Introduction

With trip approvals, you can set up a customised approval process which allows you to define who within your company can book travel with or without approval, and when the approval is needed.

1.1.Overview

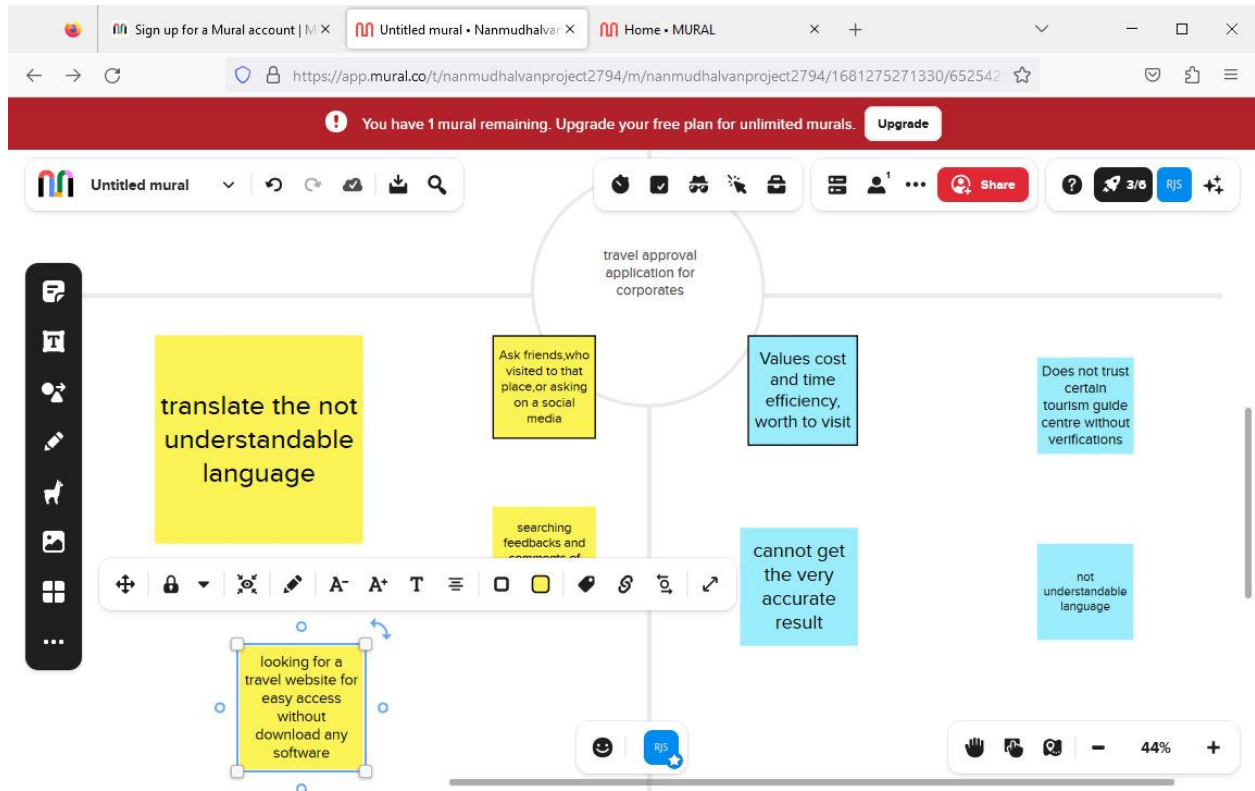
This project aim is to provide real-time knowledge for all the studentds who have basic knowledge of salesforce and looking for a real-time project.

1.2.Purpose

Pre trip approval is to control undesirable travel buying behaviours of employee cost

2.Problem Definition & Design Thinking

2.1.Emphathy Map



2.2.Ideation & Brainstroming Map

3.Result

OBJECT	FIELD NAME	DATA TYPES
Department	Amount	Currency
Expense	Airfare Hotel Rental cars Meals	Pick list
Travel	Travel approval	Master -detail Relationship

3.2.Activity & Screenshot

New Custom Object | SalesforceX

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Search Setup

Setup Home Object Manager

SETUP New Custom Object

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

New Custom Object | SalesforceX

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Search Setup

SetupHomeObject Manager

SETUP

New Custom Object

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 NameAccounts NameExample: Account Name

Data TypeText

Optional Features

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

[What is this?](#)

Case | Salesforce

Data Import Wizard

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/PageLayouts/00h5i000008NtSGAA

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

Fields

Quick FindField Name

SectionBusiness HoursCase ReasonContact FaxCreated ByEngineering Req N...Escalated

Blank SpaceCase NumberCase SourceContact MobileDate/Time ClosedEntitlement NameInternal Comments

Account NameCase OriginClosed When CreatedContact NameDate/Time OpenedEntitlement Proce...Last Modified By

AssetCase OwnerContact EmailContact PhoneDescriptionEntitlement Proce...Milestone Status

Open Activities

New TaskNew Event

Subject	Name	Task	Due Date	Status	Priority	Assigned To
Sample Text	Sample Text	✓	11/04/2023, 7:08 pm	Sample Text	Sample Text	Sarah Sample

Activity History

Log a CallMail MergeSend an EmailView All

Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Sample Text	Sample Text	✓	11/04/2023, 7:08 pm	Sarah Sample	11/04/2023, 7:08 pm

Case | Salesforce x Data Import Wizard x +

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/page?address=

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
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Buttons, Links, and Actions

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Object Limits

Record Types

Related Lookup Filters

Case Custom Field
SLA Violation
Back to Case Fields

Validation Rules [?]

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	SLA Violation	Object Name	Case
Field Name	SLAViolation	Data Type	Picklist
API Name	SLAViolation__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Rakshana J S, 06/04/2023, 11:21 am	Modified By	Rakshana J S, 06/04/2023, 11:21 am

General Options

Required ☐

Default Value

Case | Salesforce x Data Import Wizard x +

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/PageLayouts/view

Search Setup

Setup Home Object Manager

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Case

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Related Lookup Filters

Case Page Layouts

5 Items, Sorted by Page Layout Name

Q Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Case (Marketing) Layout	Rakshana J S, 06/04/2023, 11:21 am	Rakshana J S, 09/04/2023, 12:32 pm	▼
Case (Sales) Layout	Rakshana J S, 06/04/2023, 11:21 am	Rakshana J S, 09/04/2023, 12:32 pm	▼
Case (Support) Layout	Rakshana J S, 06/04/2023, 11:21 am	Rakshana J S, 09/04/2023, 12:32 pm	▼
Case Layout	Rakshana J S, 06/04/2023, 11:21 am	Rakshana J S, 09/04/2023, 12:32 pm	▼
Copy of Case (Marketing) Layout	Rakshana J S, 09/04/2023, 11:26 am	Rakshana J S, 09/04/2023, 12:32 pm	▼

Accounts | Salesforce

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000001zln0/edit?address=%2F0115

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Accounts

Edit Custom Object: Accounts - Salesforce - Developer Edition

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

Accounts

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Accounts Example: Account

Plural Label Accounts Example: Accounts

Starts with vowel sound ☒

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

Object Name Accounts Example: Account

Description

Case | Salesforce Data Import Wizard

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/ValidationRules/03d5i000001L4ut/

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Case

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Case Validation Rule

Back to Case Validation Rules

Validation Rule Detail

Edit Clone

Rule Name	Rakshana	Active	<input checked="" type="checkbox"/>
Error Condition Formula	15+2=17	Error Location	Description
Error Message	Trip_End_Date_c<Trip_Start_Date_c		
Description	Discount_Percent_c>0.30		
Created By	Rakshana J.S. 09/04/2023, 11:45 am	Modified By	Rakshana J.S. 09/04/2023, 11:45 am

Edit Clone

App Manager | Salesforce

Search Setup

Setup Home Object Manager

ap

Salesforce Mobile App

- Data
 - Mass Transfer Approval Requests
- Email
 - Apex Exception Email
- Apps
 - App Manager**
 - AppExchange Marketplace
 - Connected Apps
 - Connected Apps OAuth Usage
 - Manage Connected Apps
 - Lightning Bolt
 - Flow Category
 - Lightning Bolt Solutions

App Manager

High Volume Customer Portal	<input checked="" type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Silver Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save Save & New Cancel

Case | Salesforce

Data Import Wizard

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Setup Home Object Manager

Case

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- Case Close Page Layouts
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- Compact Layouts
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- Record Types
- Related Lookup Filters**

Validation Rules

2 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Mark_as_Escalated	Account Name	'You can only set a case as escalated if it is high priority and not closed' under the Escalated field when triggered	✓	Rakshana J S, 09/04/2023, 12:28 pm
Rakshana	Description	Trip_End_Date_c<Trip_Start_Date_c	✓	Rakshana J S, 09/04/2023, 11:45 am

https://physics-c3-dev-ed.develop.lightning.force.com/one.app#/setup/ObjectManager/Case/RelatedLookupFilters/view

Case | Salesforce x Data Import Wizard x +

← → ↻ 🔒 https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/ValidationRules/03d5i000001L4uy/ ☆

Search Setup

Setup Home Object Manager

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Case Validation Rule

[Back to Case Validation Rules](#) [Help for this Page](#)

Validation Rule Detail [Edit](#) [Clone](#)

Rule Name: **Mark_as_Escalated** Active: ☒

Error Condition Formula: `IF(IsEscalated, OR(IsClosedOnCreate, ISPICKVAL(Status, 'Closed'), ISPICKVAL(Priority, 'Low'), ISPICKVAL(Priority, 'Medium')), NULL)`

Error Message: "You can only set a case as escalated if it is high priority and not closed" under the Escalated field when triggered Error Location: Account Name

Description:

Created By: [Rakshana J S](#), 09/04/2023, 12:26 pm Modified By: [Rakshana J S](#), 09/04/2023, 12:28 pm [Edit](#) [Clone](#)

App Manager | Salesforce x +

← → ↻ 🔒 https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/page?address=%2F02u5i00000esM/ ☆

Search Setup

Setup Home Object Manager

Q ap

Salesforce Mobile App

- ▼ Data
 - Mass Transfer Approval Requests
- ▼ Email
 - Apex Exception Email
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 - App Manager**
 - AppExchange Marketplace
 - ▼ Connected Apps
 - Connected Apps OAuth Usage
 - Manage Connected Apps
 - ▼ Lightning Bolt
 - Flow Category
 - Lightning Bolt Solutions

SETUP

App Manager

Show in Lightning Experience ☐

Assign to Profiles

Profile	<input type="checkbox"/> Visible	<input type="checkbox"/> Default
Analytics Cloud Integration User	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Custom	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Portal Manager Standard	<input checked="" type="checkbox"/>	<input type="checkbox"/>
External Apps Login User	<input type="checkbox"/>	<input type="checkbox"/>

New Accounts Report | Salesforce

Data Import Wizard

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/r/Report/0005i000007HBa2EAG/view?queryScope=userFolders

Search...

Lightning Usage App

Lightning Usage

Accounts

New Accounts Report

Report: Accounts

New Accounts Report

Enable Field Editing

Add Chart

Edit

Total Records

12

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Rakshana J S	GenePoint	CA	Customer - Channel	Cold	06/04/2023
2	-	Rakshana J S	United Oil & Gas, UK	UK	Customer - Direct	-	06/04/2023
3	-	Rakshana J S	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	06/04/2023
4	-	Rakshana J S	Edge Communications	TX	Customer - Direct	Hot	06/04/2023
5	-	Rakshana J S	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	06/04/2023
6	-	Rakshana J S	Pyramid Construction Inc.	-	Customer - Channel	-	06/04/2023
7	-	Rakshana J S	Dickenson plc	KS	Customer - Channel	-	06/04/2023
8	-	Rakshana J S	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	06/04/2023
9	-	Rakshana J S	Express Logistics and Transport	OR	Customer - Channel	Cold	06/04/2023
10	-	Rakshana J S	University of Arizona	AZ	Customer - Direct	Warm	06/04/2023
11	-	Rakshana J S	United Oil & Gas Corp.	NY	Customer - Direct	Hot	06/04/2023
12	-	Rakshana J S	sForce	CA	-	-	06/04/2023

Home | Salesforce

Data Import Wizard

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home

Search Setup

Setup

Home

Object Manager

Monitor Bulk Data Load Jobs

Help for this Page

Monitor the status of recent bulk data load jobs. These jobs are created by Data Loader and other Bulk API client applications.

Quota

Your organization has processed 0 batches in the last 24 hours. Your organization can process 15,000 batches in a 24-hour period.

Resource used in the last 24 hours:

CPU: 0 milliseconds

ID: 0 bytes

Disk: 0 bytes

In Progress

Action	Job ID	Submitted By	Start Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Progress
Abort Close	750500000F0D7c	J.S. Rakshana	09/04/2023, 10:00 am	Open	Bulk V1	Insert	department			

Completed last 7 days

Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
750500000F0D8a	J.S. Rakshana	09/04/2023, 10:06 am	09/04/2023, 10:06 am	Closed	Bulk V1	Upsert	department	2	0	00:00

Case | Salesforce x Data Import Wizard x +

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/page?addr...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
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Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

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Related Lookup Filters

Picklist Options

Restrict picklist to the values defined in the value set

Controlling Field [New]

Picklist Values Used

Active picklist values 2 (1,000 max)

Inactive picklist values 0

Field Dependencies [New] [Field Dependencies Help ?](#)

No dependencies defined.

Validation Rules [New] [Validation Rules Help ?](#)

No validation rules defined.

Values [New] [Reorder] [Replace] [Printable View] [Chart Colors] [Values Help ?](#)

Delete Selected Deactivate Selected Replace Selected

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	No	No	<input type="checkbox"/>	Assigned dynamically	Rakshana J S, 06/04/2023, 11:21 am

Case | Salesforce x +

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Status/view

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Field Dependencies [New] [Field Dependencies Help ?](#)

No dependencies defined.

Validation Rules [New] [Validation Rules Help ?](#)

No validation rules defined.

Case Status Picklist Values [New] [Reorder] [Replace] [Printable View] [Chart Colors] [Case Status Picklist Values Help ?](#)

Action	Values	API Name	Closed	Default	Chart Colors	Modified By
Edit Deactivate	New	New	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assigned dynamically	Rakshana J S, 06/04/2023, 11:21 am
Edit Del Deactivate	Working	Working	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Rakshana J S, 06/04/2023, 11:21 am
Edit Del Deactivate	Escalated	Escalated	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Rakshana J S, 06/04/2023, 11:21 am
Edit Del Deactivate	Closed	Closed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Rakshana J S, 06/04/2023, 11:21 am

Inactive Values

No Inactive Values values defined.

Case | Salesforce x Data Import Wizard x +

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/PageLayouts/00h5i000008NtSGA/

Setup Home Object Manager Case

Case (Sales) Layout

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

Quick Find Field Name

Fields

Section Business Hours Case Reason Contact Fax Created By Engineering Req N... Escalated

Blank Space Case Number Case Source Contact Mobile Date/Time Closed Entitlement Name Internal Comments

Account Name Case Origin Closed When Created Contact Name Date/Time Opened Entitlement Proce... Last Modified By

Asset Case Owner Contact Email Contact Phone Description Entitlement Proce... Milestone Status

Case Sample

Highlights Panel

Customer

Case Number GEN-2004-001234 Created Date 11/04/2023, 7:08 pm Status Sample Text

Sample Text

Priority Sample Text

Sample Text

Case Owner Sample Text

1-415-555-1212

Case | Salesforce x +

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Status/view

Setup Home Object Manager Case

Case Field

Status

Back to Case Fields

Edit Set Field-Level Security View Field Accessibility

Field Information

Field Label Status Field Name Status

Data Type Picklist

Help Text

Description

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Picklist Values Used

Active picklist values 4 (100 max)

Inactive picklist values 0

Field Dependencies

New

Field Dependencies Help

Case | Salesforce x Data Import Wizard x +

← → ↻ 🔒 https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/page?addr...

Search Setup

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Inactive picklist values: 0

Field Dependencies [New](#) [Field Dependencies Help](#)

No dependencies defined.

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Values Help](#)

[Delete Selected](#) [Deactivate Selected](#) [Replace Selected](#)

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	No	No	<input type="checkbox"/>	Assigned dynamically	Rakshana J S , 06/04/2023, 11:21 am
<input type="checkbox"/> Edit Del Deactivate	Yes	Yes	<input type="checkbox"/>	Assigned dynamically	Rakshana J S , 06/04/2023, 11:21 am

Inactive Values [Delete Unused Values](#) [Inactive Values Help](#)

No inactive values values defined.

[Back To Top](#) Always show me [more records per related list](#)

Case | Salesforce x Data Import Wizard x +

← → ↻ 🔒 https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/CaseClosePageLayouts/00h5i0000...

Search Setup

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

Fields [Quick Find](#)

Report Charts

Section	Case Origin	Created By	Internal Comments	SLA Violation	Type	Web Phone
Blank Space	Case Owner	Date/Time Opened	Potential Liability	Status	Web Company	
Account Name	Case Reason	Description	Priority	Subject	Web Email	
Case Number	Contact Name	Engineering Req N...	Product	Total Expenses	Web Name	

Highlights Panel

Customize the highlights panel for this page layout...

Case Detail [Standard Buttons](#) [Custom Buttons](#)

Case Information (Header visible on edit only)

Status	Sample Text
Case Reason	Sample Text
Internal Comments	Sample Text
Total Expenses	11/04/2023, 7:08 pm

department | Salesforce

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000001zInt/Details/view

Search Setup

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department

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Description

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

Edit Delete

New Custom Object | SalesforceX

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Search Setup

Setup Home Object Manager

SETUP
New Custom Object

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

[What is this?](#)

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

Case | Salesforce

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/CaseNumber

Search Setup

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Case Field

Case Number

Back to Case Fields

Set Field-Level SecurityView Field Accessibility

Field Information

Field Label	Case Number	Field Name	CaseNumber
Data Type	Auto Number		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Display Format	{00000000}		

Case | Salesforce

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/CaseNumber

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Case Field

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Set Field-Level SecurityView Field Accessibility

Field Information

Field Label	Case Number	Field Name	CaseNumber
Data Type	Auto Number		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Display Format	{00000000}		

Case | Salesforce

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Owner/view

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Case Field

Case Owner

Back to Case Fields

Edit Set Field-Level Security View Field Accessibility

Field Information

Field Label	Case Owner	Field Name	Owner
Data Type	Lookup(User,Group)		
Help Text			
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

New

Validation Rules Help

No validation rules defined.

App Manager | Salesforce

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/page?address=%2F02u5i000000esMl

Search Setup

Setup Home Object Manager

ap

Salesforce Mobile App

- Data
 - Mass Transfer Approval Requests
- Email
 - Apex Exception Email
- Apps
 - App Manager
 - AppExchange Marketplace
 - Connected Apps
 - Connected Apps OAuth Usage
 - Manage Connected Apps
 - Lightning Bolt
 - Flow Category
 - Lightning Bolt Solutions

App Manager

Appointment Invitations

Assets

Asset Actions

Asset Action Sources

Asset State Periods

Card Payment Methods

Credit Memos

D&B Companies

Digital Wallets

Engagement Channel Types

Finance Balance Snapshots

Finance Transactions

Invoices

Add

Remove

Service Resources

Data Use Legal Basis

List Emails

Shifts

Service Territories

Communication Subscriptions

Opportunities

App Launcher

Sellers

Authorization Form Text

Profile Feed

User Provisioning Requests

Files

Up

Down

Overwrite Users' Personal Custom App Customizations

Default Landing Tab

Home

Show in Lightning Experience

Assign to Profiles

Profile	Visible	Default
Analytics Cloud Integration User	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input type="checkbox"/>	<input type="checkbox"/>

Case | Salesforce

Case | Salesforce

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Account/vis

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Back to Case Fields

EditSet Field-Level SecurityView Field Accessibility

Field Information

Field Label	Account Name	Field Name	Account
Data Type	Lookup(Account)	Child Relationship Name	Cases
Help Text			
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Lookup Filter

No lookup filters defined.

Validation Rules

New

Validation Rules Help

Action	Rule Name	Error Message	Active	Modified By
Edit Del	Mark as Escalated	You can only set a case as escalated if it is high priority and not closed under the Escalated field when triggered	✓	Rakshana J S, 09/04/2023, 12:28 pm

Home | Salesforce

Data Import Wizard

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home

Search Setup

SetupHomeObject Manager


Data Import Wizard

Help for this page

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	department	2	0	0	04-09-2023 04:36	114
Open	department	0	0	0	04-09-2023 04:30	0

Bulk Api Monitoring



Before you import your data...

Collapse

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.

4.Trailhead Profile Public UR

Team Lead <https://trailblazer.me/id/rakj1>

Team Member 1 <https://trailblazer.me/id/ssineka>

Team Member 2 <https://trailblazer.me/id/gsangavi19>

Team Member 3 <https://trailblazer.me/id/vmary25>

5.Advantages & Disadvantages

Advantage:Improved accuracy of important approval data.

Disadvantage: The biggest short coming of salesforce solution is simply their complexity.

6.Applications

This will help executives the monitor the expected travel cost. This application can be used by the browser and available to the mobile power apps application.

7.Conclusion

This study answers the call by previous researchers for future research to focus on emergent transaction channels.

8.Future Scope

1.There is a massive oppourtunity in travel application.

2.There is also a lot of unique challenges ahead that must be addressed.