

Capstone Project Report On "TRAVEL APPROVAL APP"

BY:

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INTRODUCTION TO SALESFORCE

- What is salesforce?
- Why do we use salesforce?
- What does Salesforce do?
- What are the benefits of Salesforce?
- What is CRM
- What is Cloud Computing



INTRODUCTION OF TRAVEL APPROVAL APP

 The travel approval project in Salesforce is a system designed to automate and streamline the process of requesting and approving travel expenses for employees. The project involves several components, including a custom object to track travel requests, a custom approval process, and various integrations with external systems.

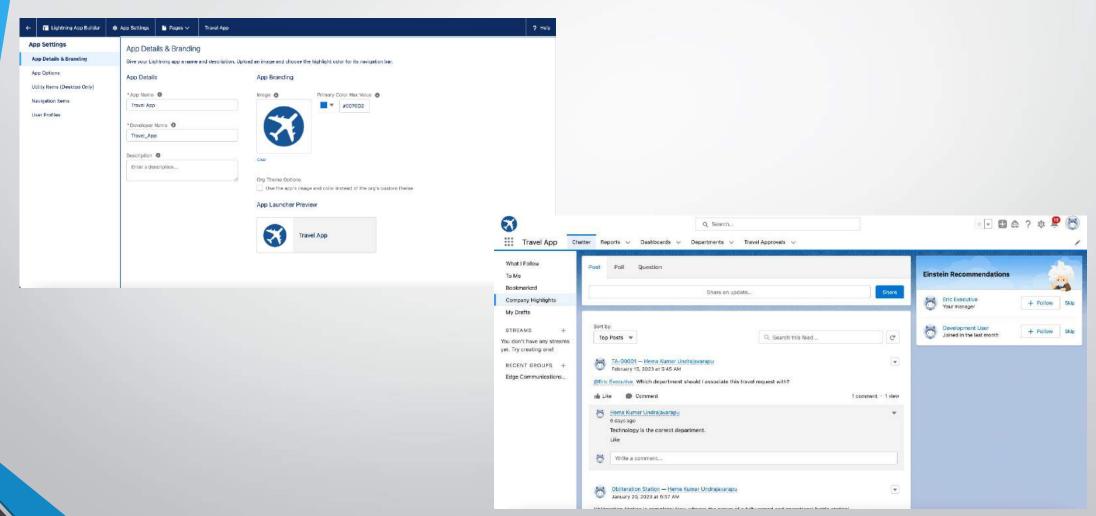
 Overall, the travel approval project in Salesforce provides a streamlined and efficient way for employees to request and manage travel expenses, while also providing managers with the tools they need to ensure that all expenses are approved and accounted for.

MODULE 1

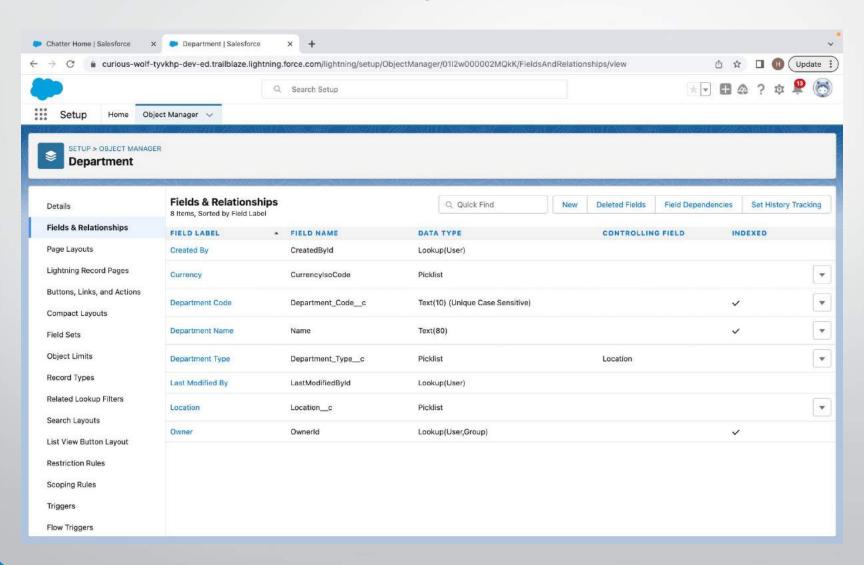
- This project module focuses on the non-coding approach to modifying the user interface, as you customize an app that tracks company travel.
- Create Custom
 App, Objects, Fields & Relationships, and how you customize the App using
 declarative tools.

Module Take Away

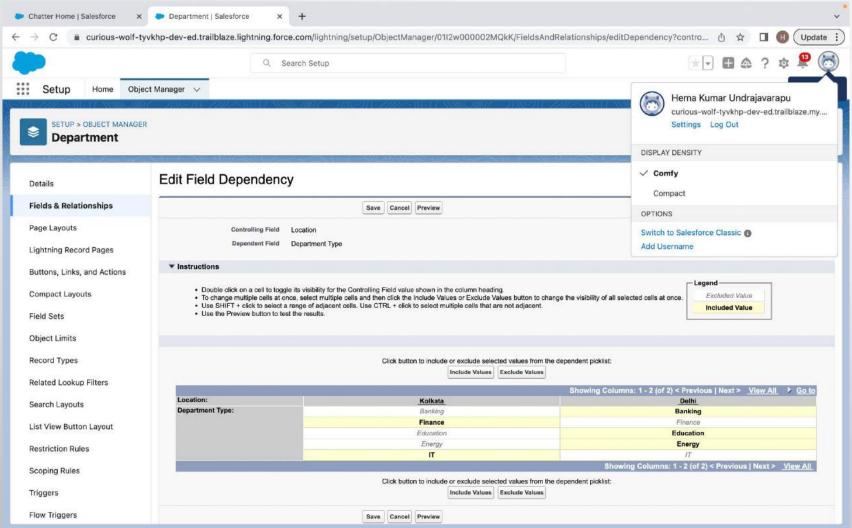
Creating Lightning App: TRAVEL APP



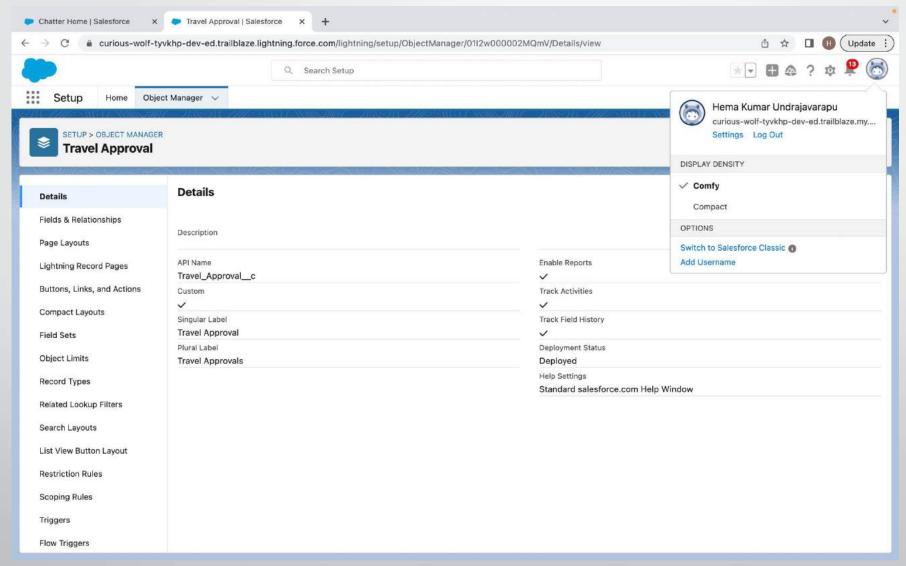
Custom object Department and Creating custom fields in Department Object



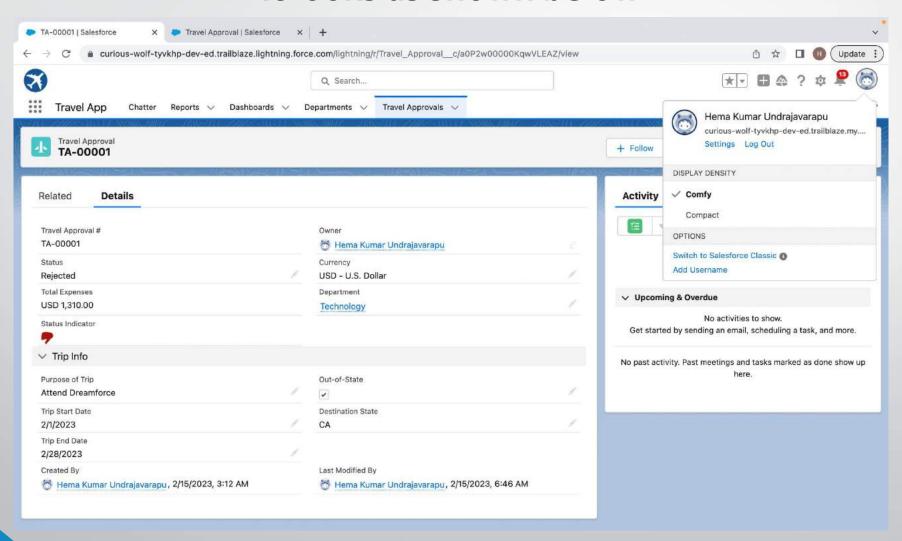
Field Dependency in Department



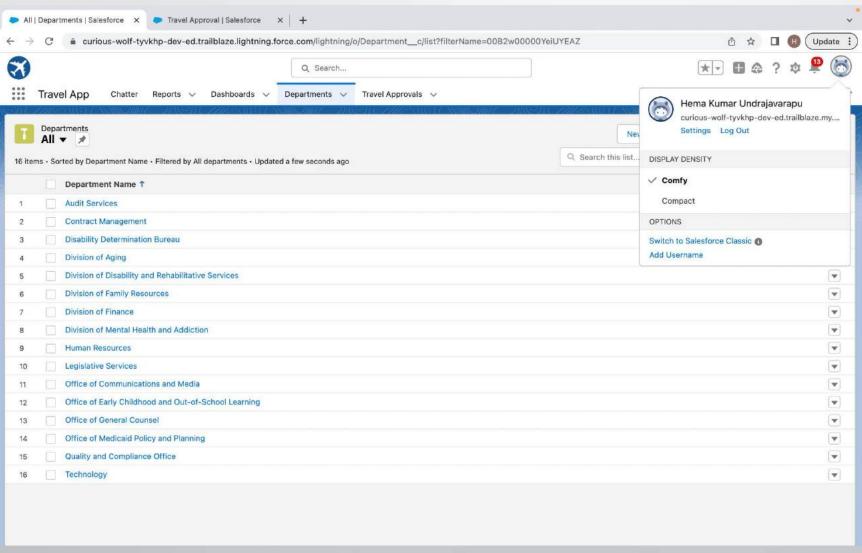
Creating Custom Object Travel Approval and Custom Fields in that Object



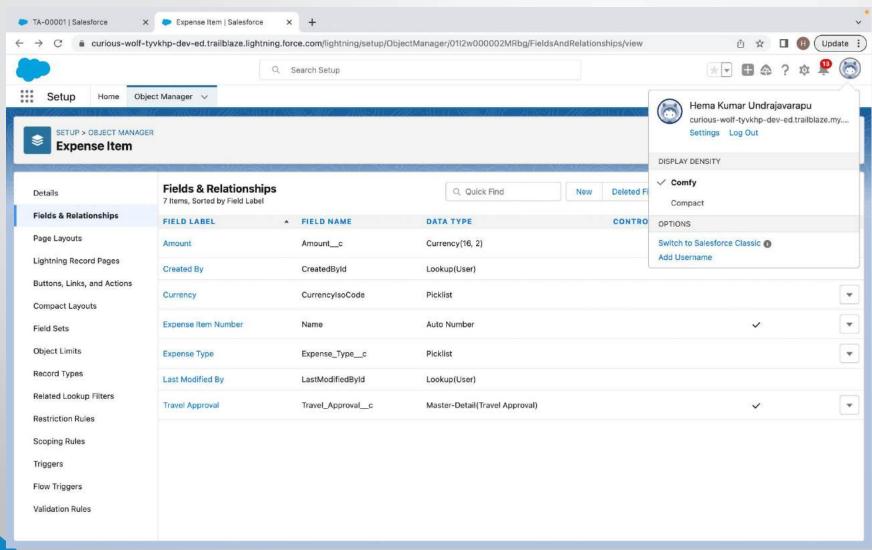
After creating Travel Approval object with fields, it looks as shown below



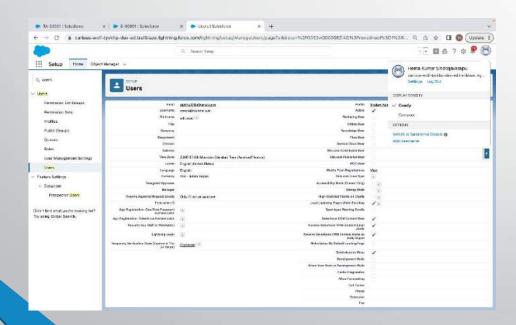
Importing Department records using data import wizard and imported record data status can viewed below

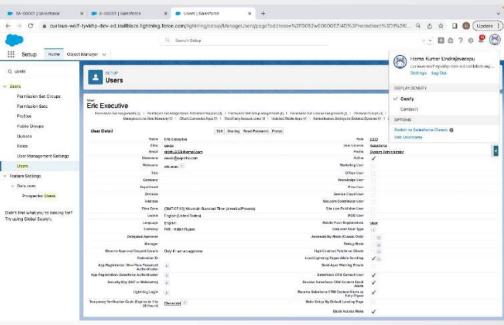


Creating Expense Item custom object and Custom fields in Expense Item object



Creating User withsystem admin license

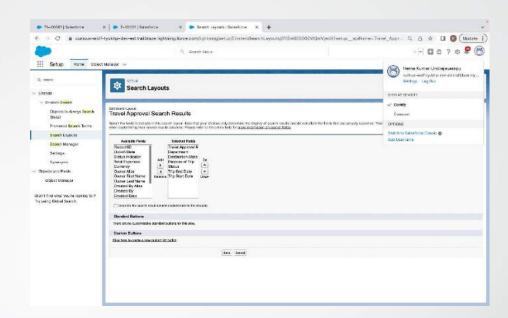


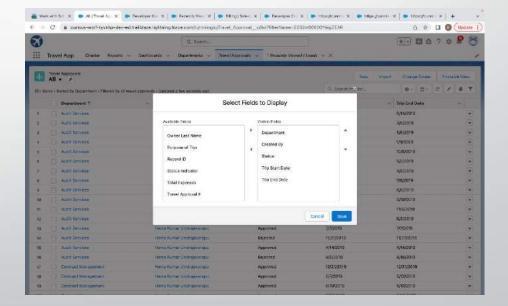


Add user eric as manager own account user

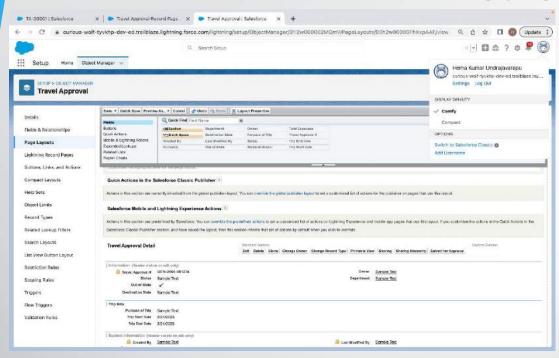
Customize the Travel Approval Default search layout

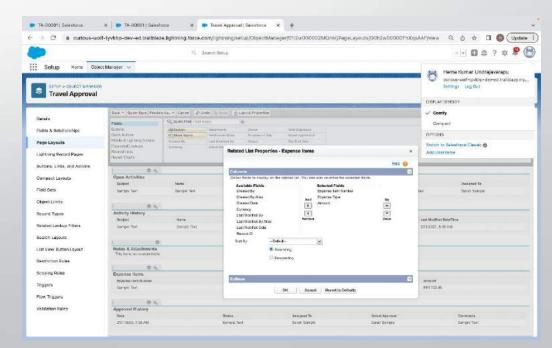
Select fields to display in the Travel Approval "All" List view



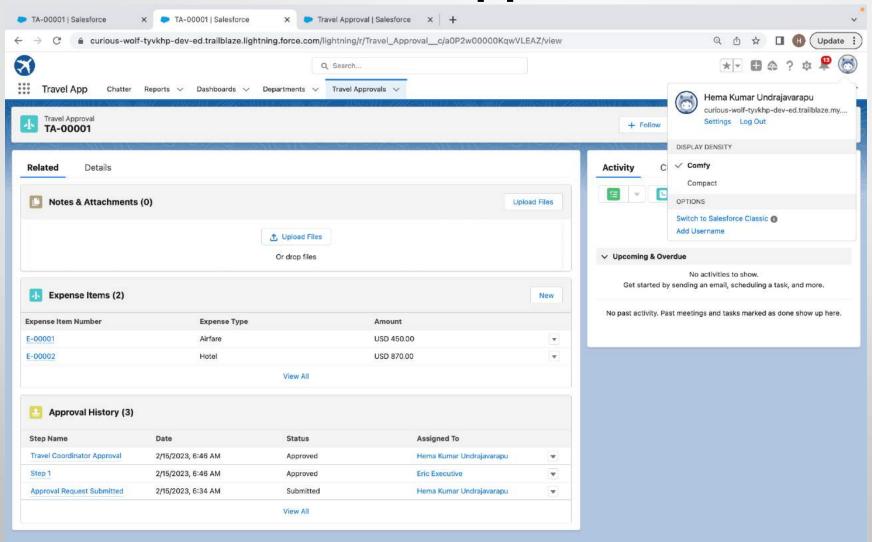


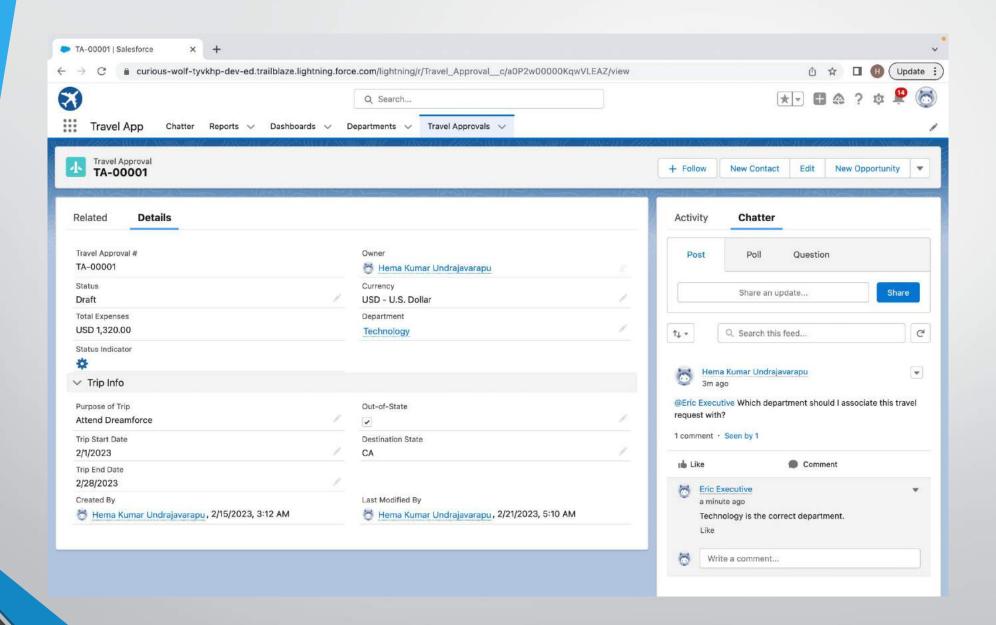
Customizing page layout





Test the app:



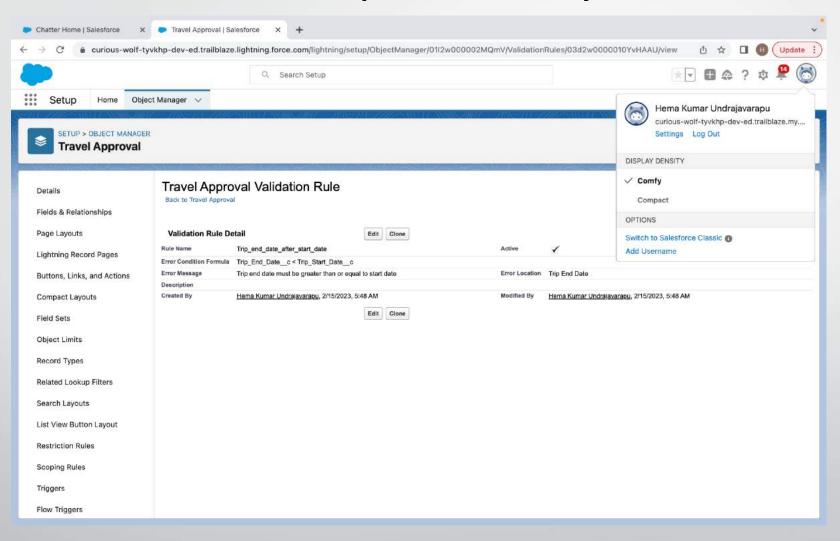


MODULE 2

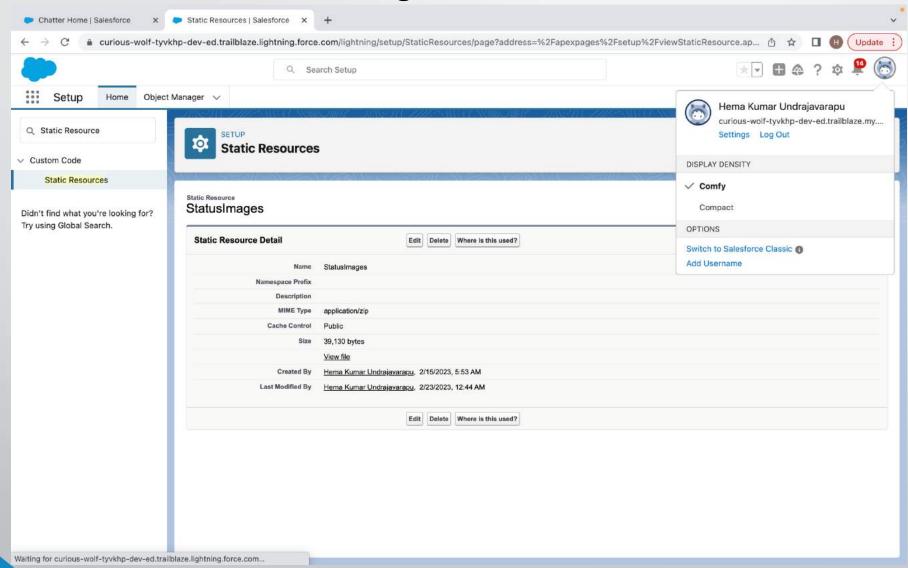
 This project module focuses on the Automation and Analytics Tools to enhance your custom App development.

 Define Business logic using Validation rules, Roll-up summary fields, Formulas, Flows & how you track Travel Approvals using Reports and Dashboards

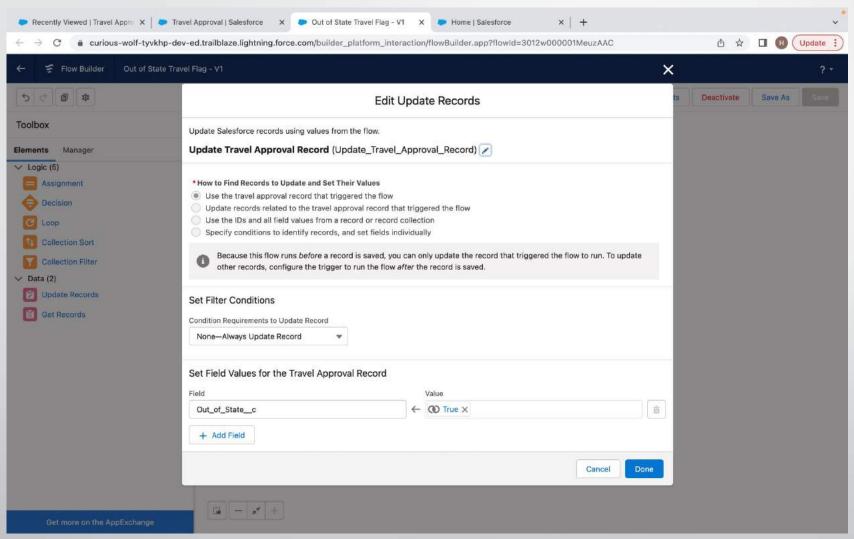
Validation Rule that trip end date always >= start date



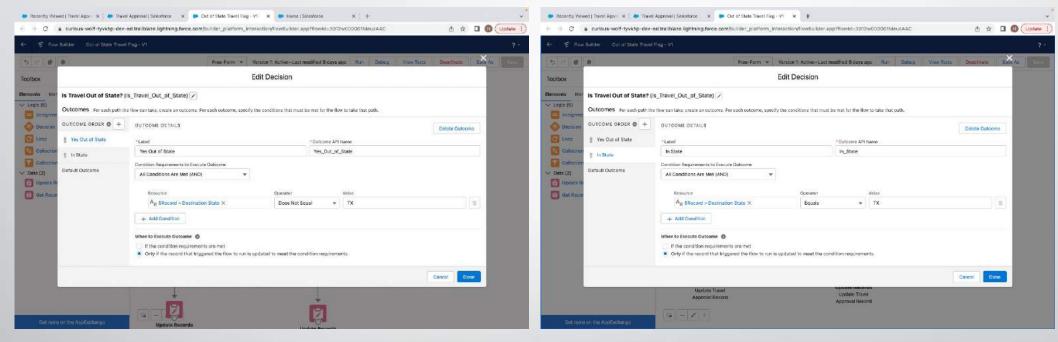
Creating Formula Fields



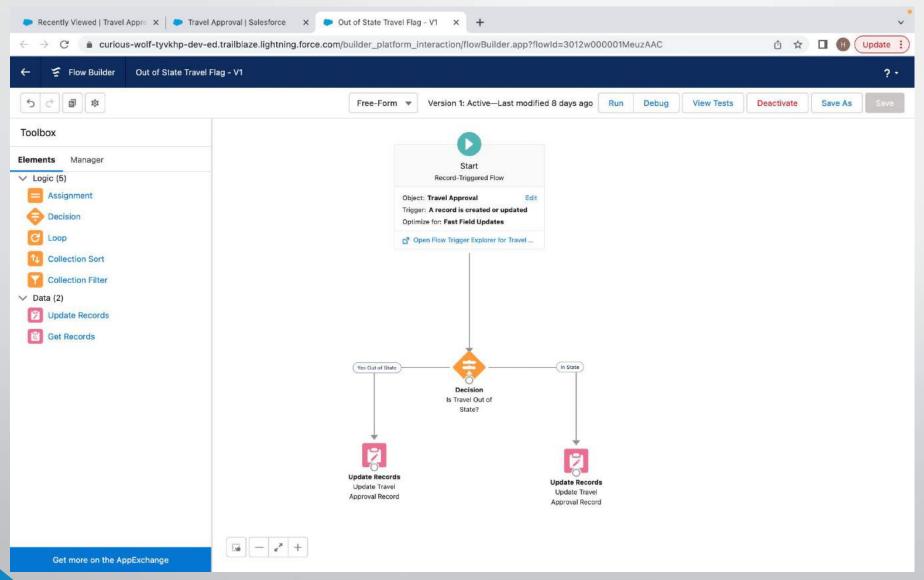
Create a Record – Triggered Flow



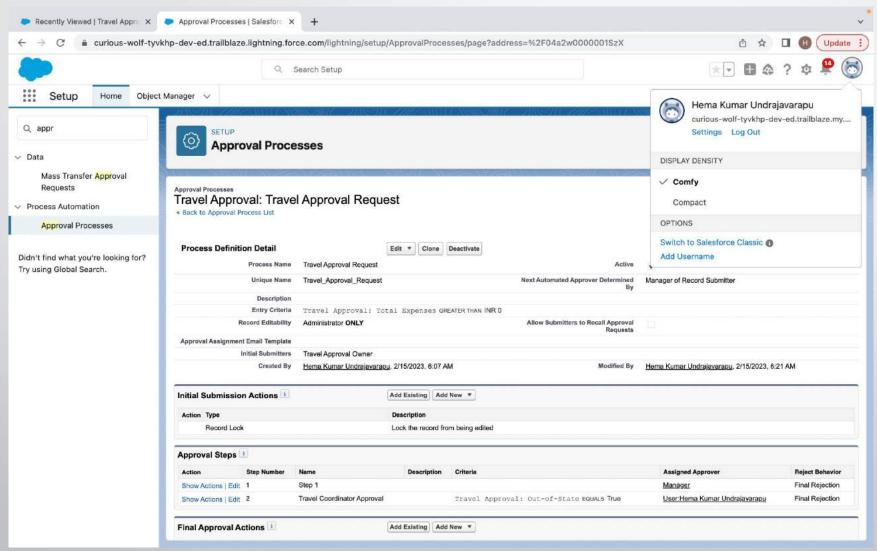
And add Decision element to flow



Finally, the flow looks as shown, save and activate

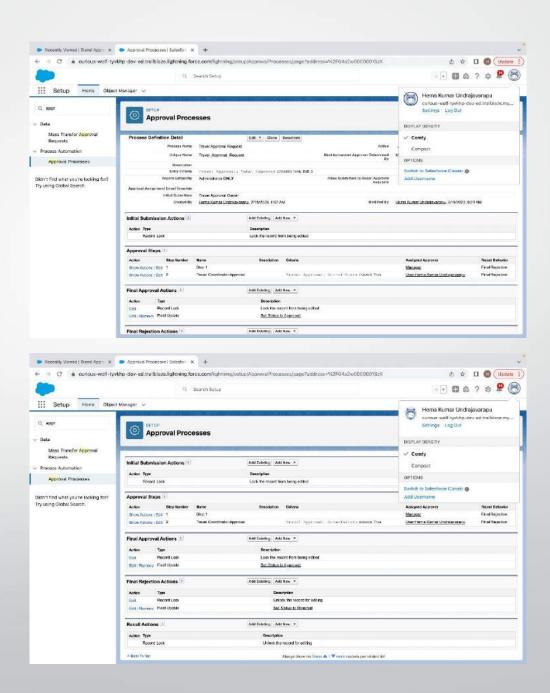


Creating an Approval Process to send travel approvals to manager or travel coordinator



Final Approval Action:

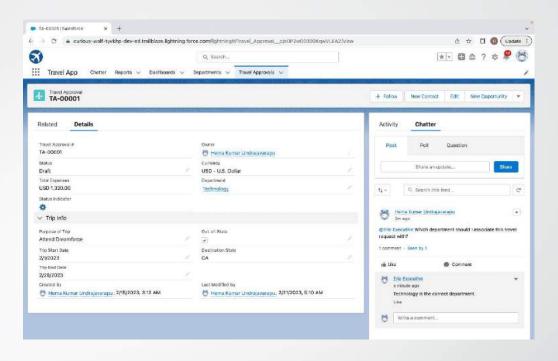
Final Rejection Action:

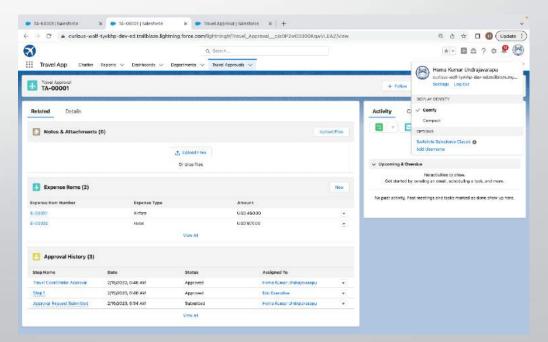


Testing the approval process Status is pending here, Next submit for approval

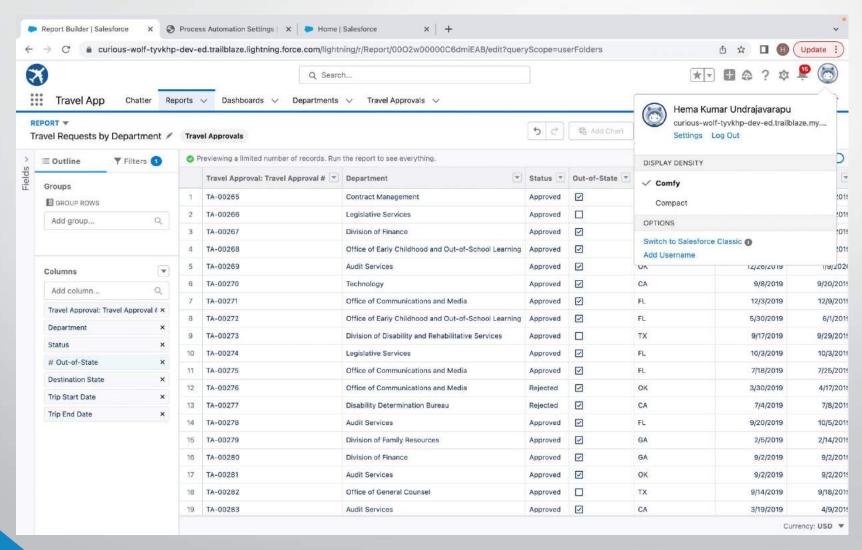
Login as Eric to give Approval

Can Approve or Reject

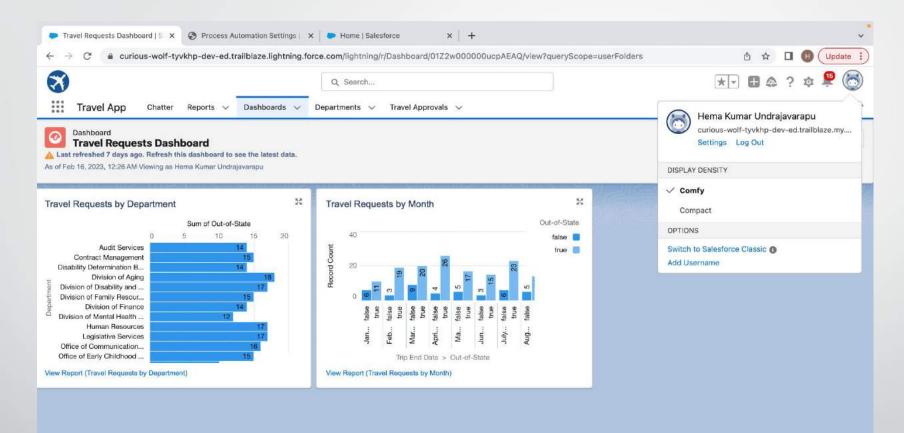




Using Data import wizard to import travel approval records, later the Records imported successfully



Final Dashboard



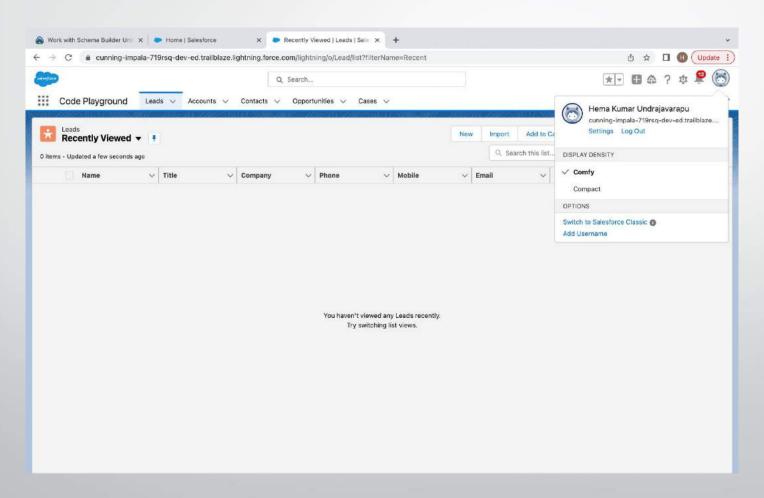
MODULE 3

 This project module focuses on the coding approach to extend the functional capabilities of your custom App.

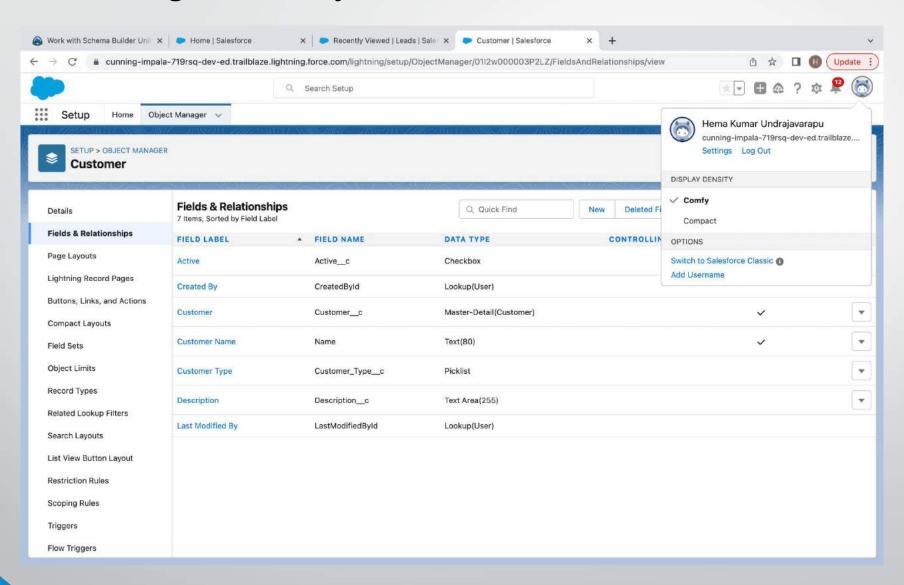


Exercise - 01

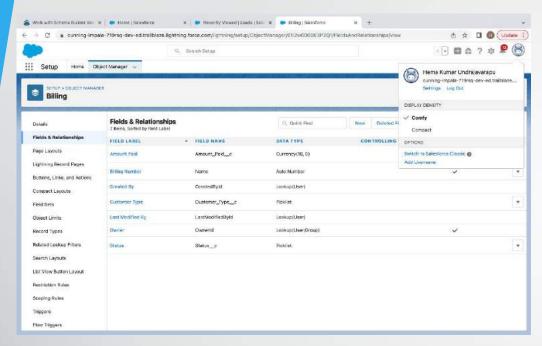
Creating Code Playground Lightning App with Lead, Account, Contact, Opportunity, Case to navigation profile as system admin.

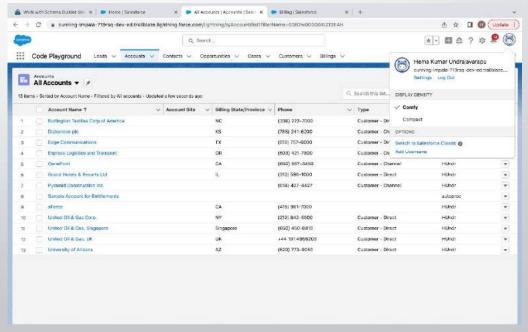


Creating custom object Customer and add related fields



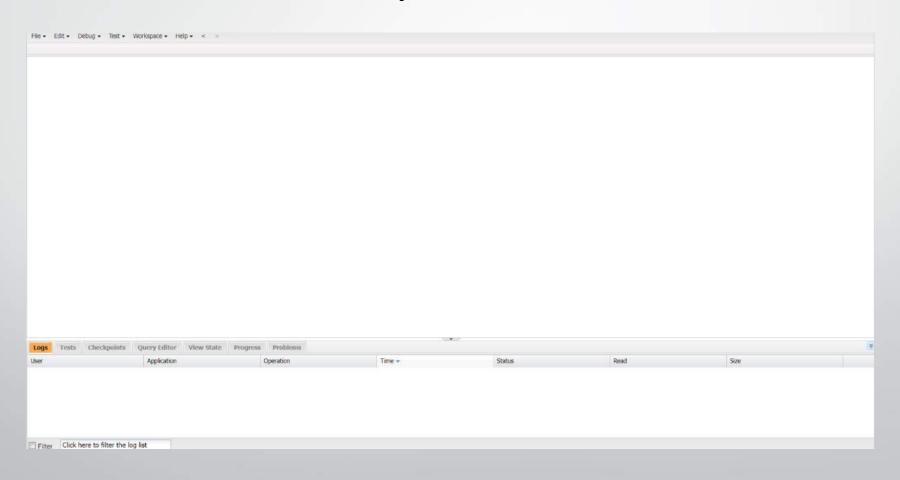
Creating custom object Billing and add related fields



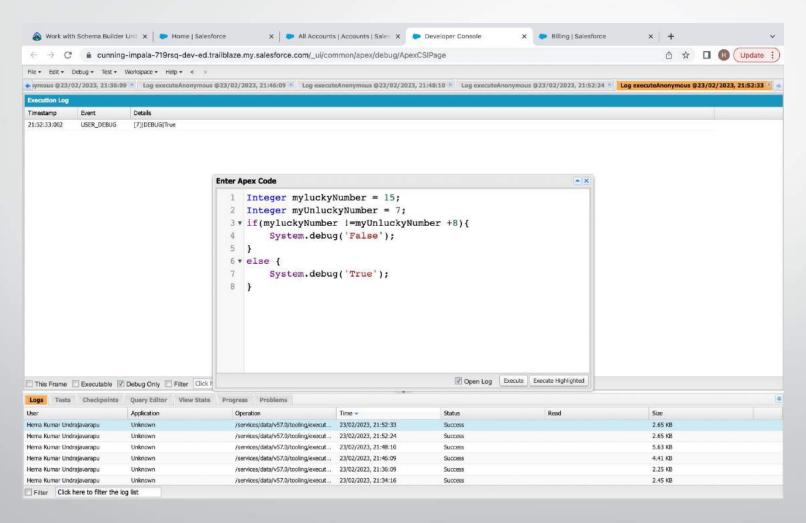


Exercise - 02

Use Execute Anonymous to define and execute the following code: Developer Console

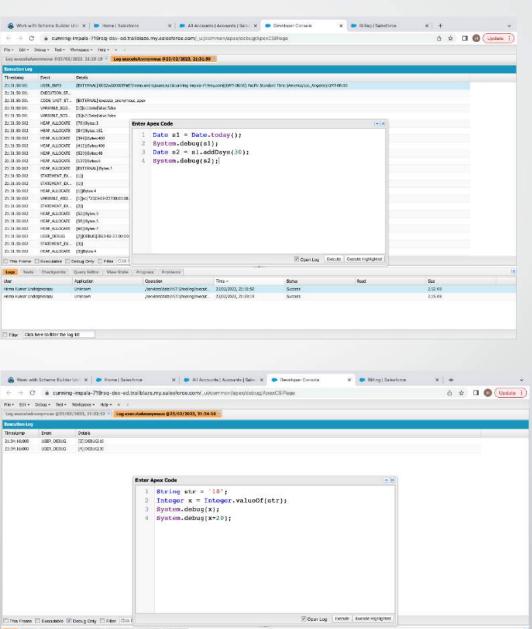


1.Define a String Variable & use string method 'endsWith' to display the output. By clicking oh Debug and select open Anonymous window



2. Define 2 Date type variables, use Date method today() & addDays(30) to display the output

3. Display the output of an Integer variable from string '10' and then add 20 to it.

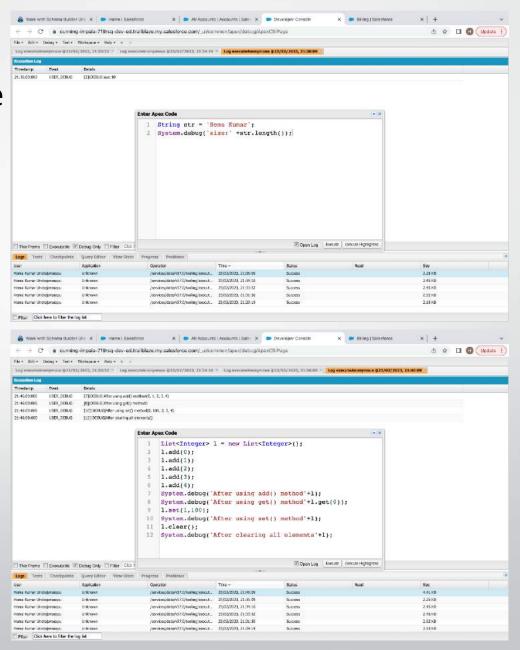


/services/date/v57.0/tsoling/execut. 23/02/2523, 21:33:52

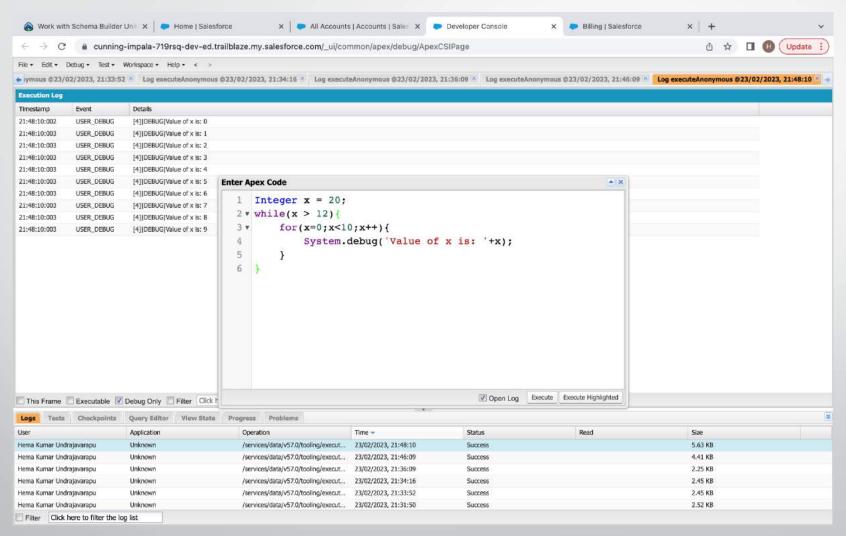
Filter Olds here to filter the log list

4. Define a String Variable & use string method length() to display the output

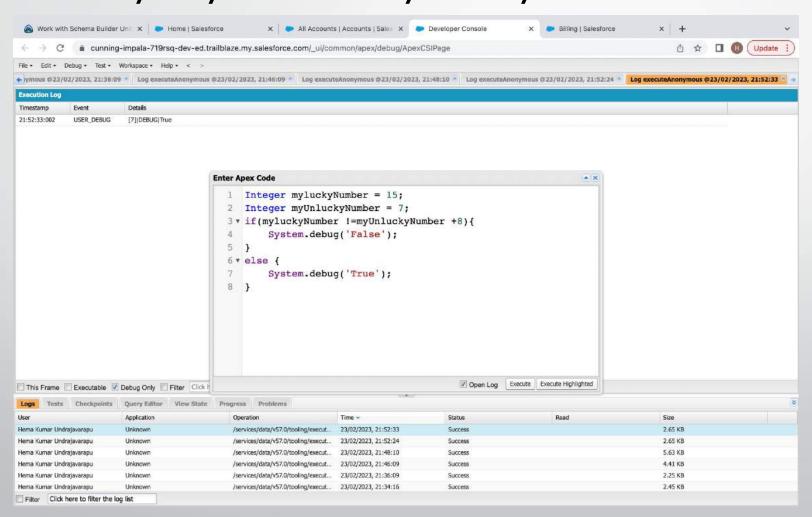
5. Define a List of integer and display the output using add(), get(), set(), clear(), methods.



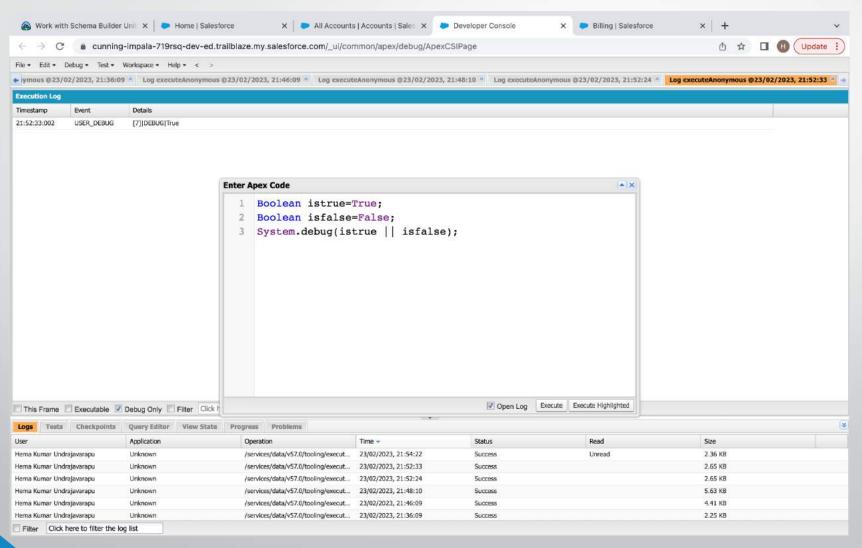
Use Execute Anonymous to define and execute the following code to display the value of x = 0 to 9.



Answer the following in True or False:
Integer myunlucklyNumber = 7; Integer myluckyNumber = 15;
myluckyNumber != myunlucklyNumber + 8.



Answer the following in True Or False: Boolean isFalse = false; Boolean isTrue = true;

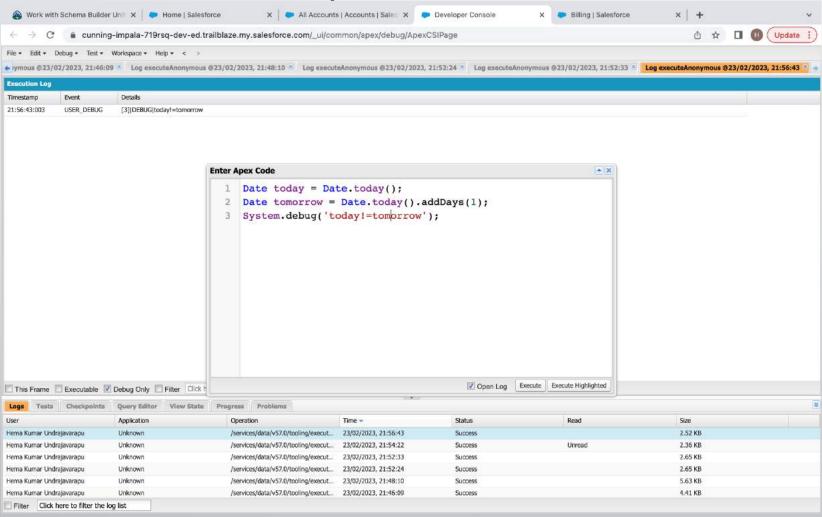


Answer the following in True Or False:

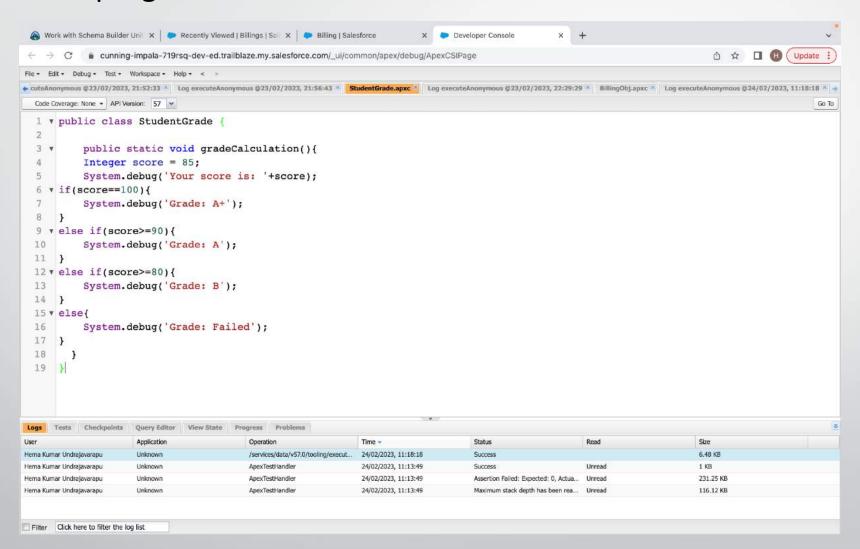
Date tomorrow = Date.today().addDays(1);

Date today = Date.today();

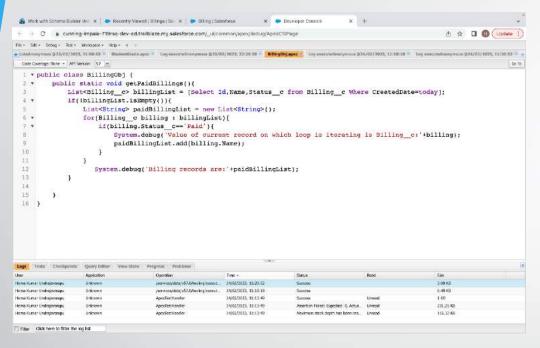
today!= tomorrow

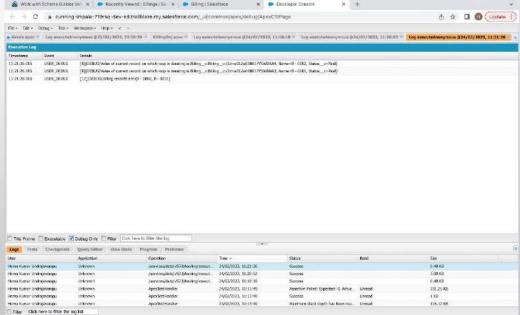


Write a program and execute to demo the use of "If..else if...else"

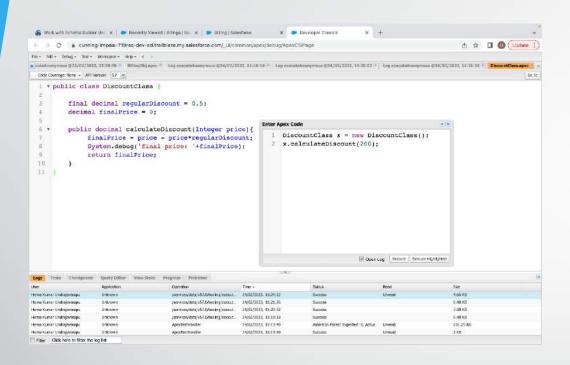


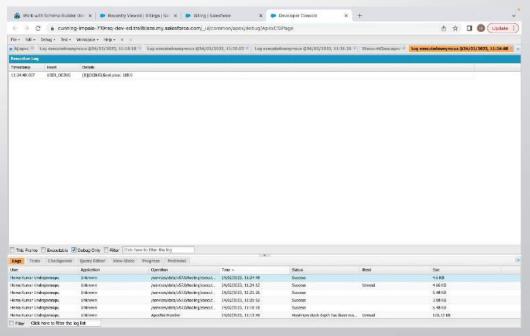
Write a program to execute and demo the use of "Apex – for Loop"



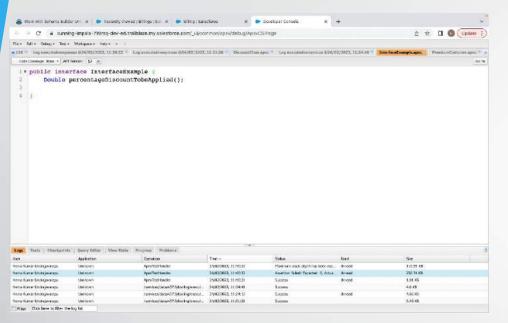


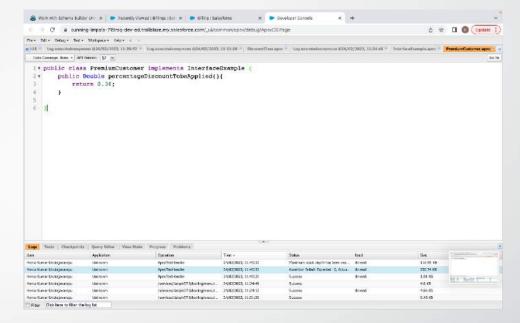
Write a Class to demo the use of Constants in Apex

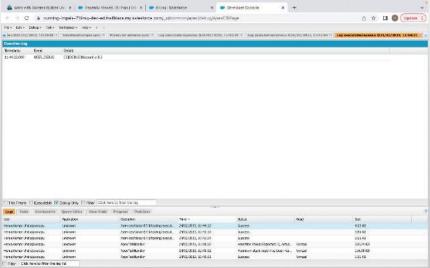




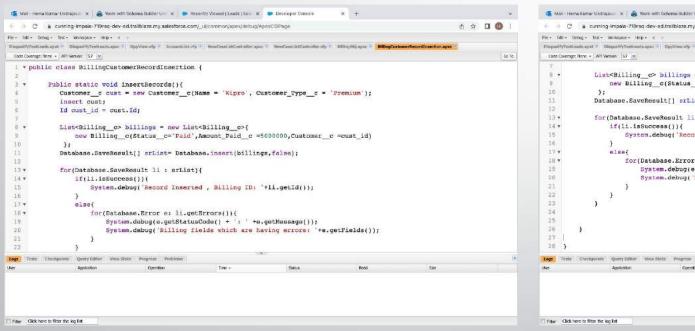
Write a Class to demo the use of Interface in Apex

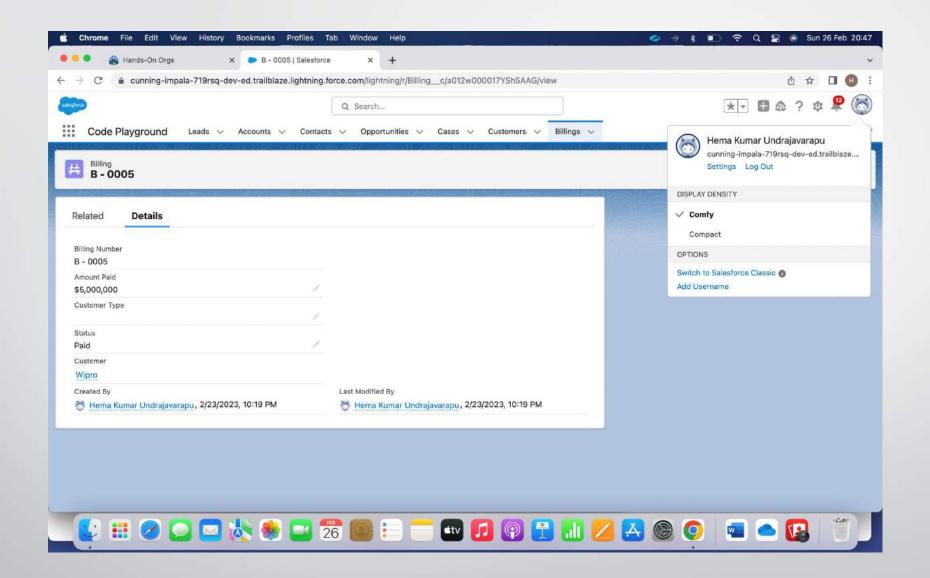






Insert Billing record using Database methods Here use record id to insert customer

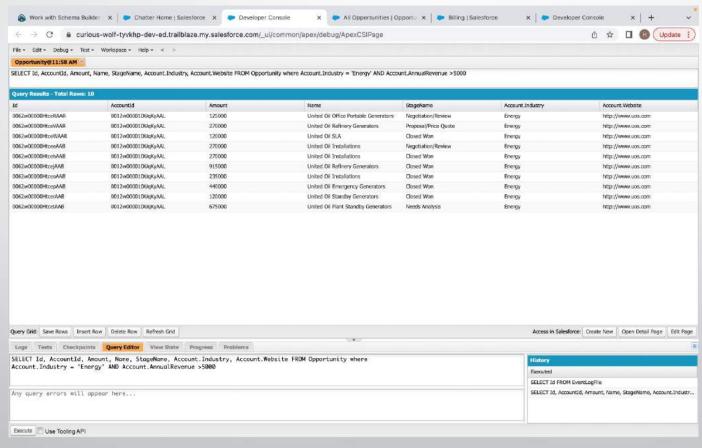




Write and execute SOQL queries from Developer Console
Display ID, Amount, Stage, Account Name, Account Industry, Account Website
From Opportunity

AND "Account Annual Revenue > 5000"

Add a Where Clause "Account Industry = Energy"

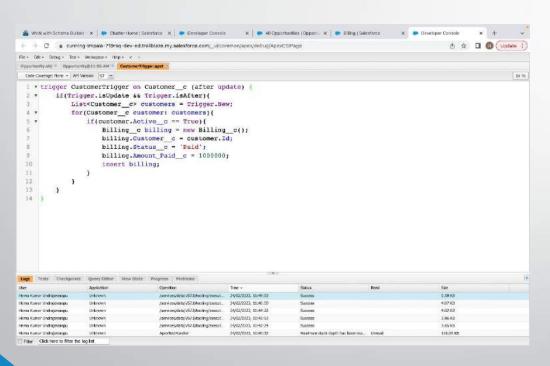


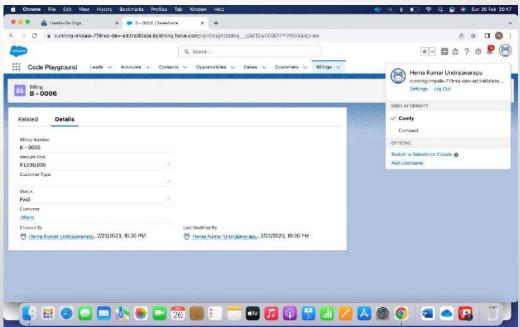
Write an Apex Trigger, Name = CustomerTrigger.

Create a Billing Record when on Customer Object the 'Status' field changes
to Active from Inactive. Billing "Status" must be: Paid, Amount Paid =

15000

Perform the DML on a List.

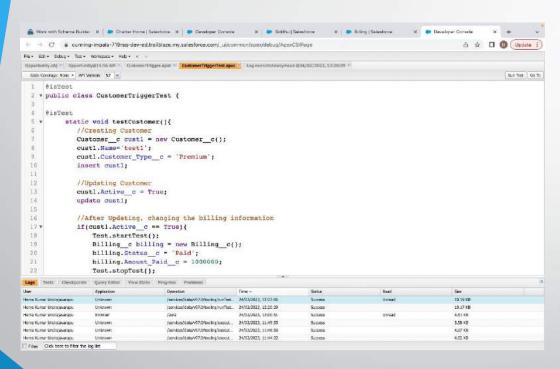


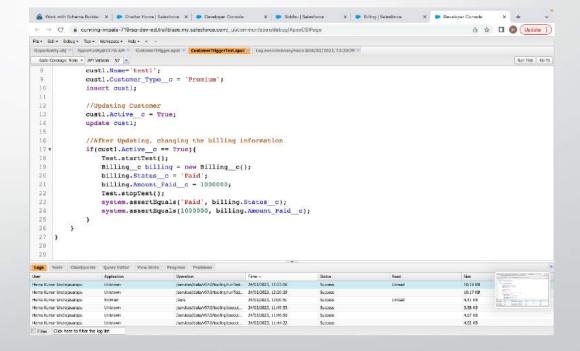


Write a Test Class for CustomerTrigger.

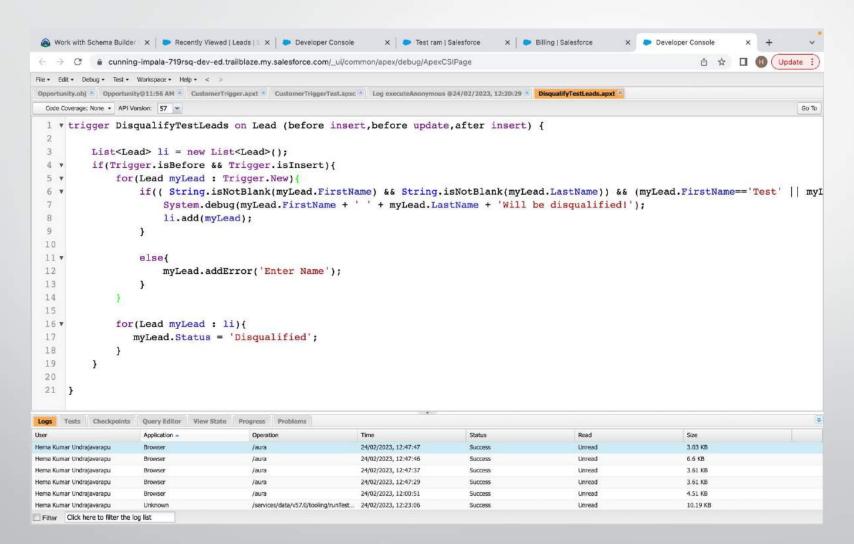
Create the Data for the Customer custom Object
Use Test.startTest() & Test.stopTest().

Use assert statement to validate the output,
Test Class must have full code coverage.

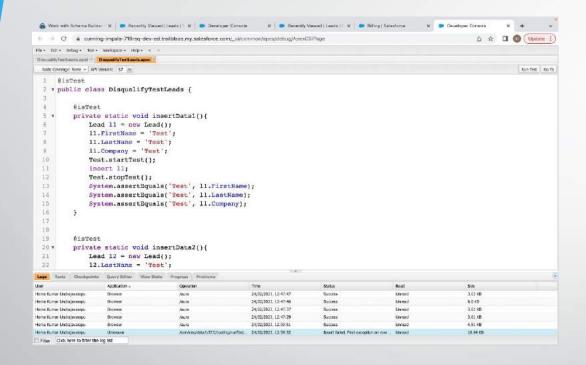


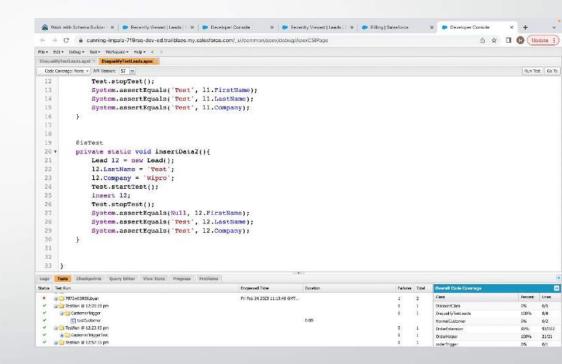


ApexTrigger,Name=DisqualifyTestLeads

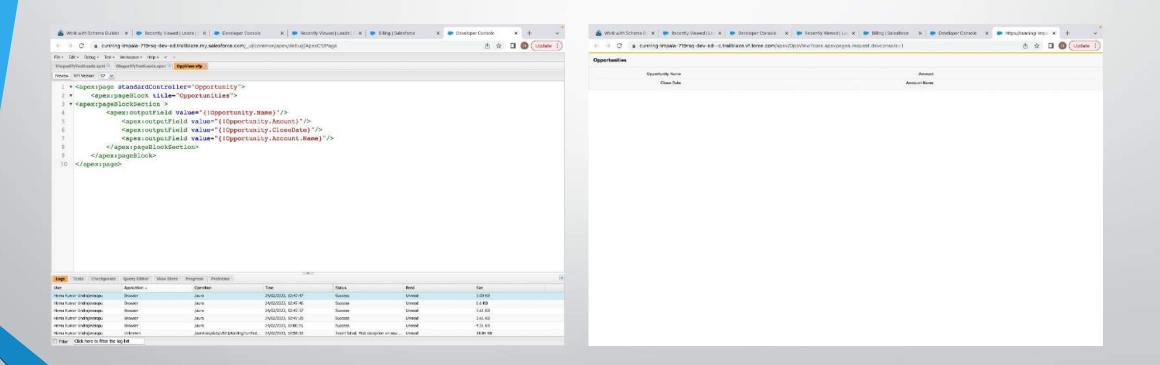


Write a Test Class for DisqualifyTestLeads.

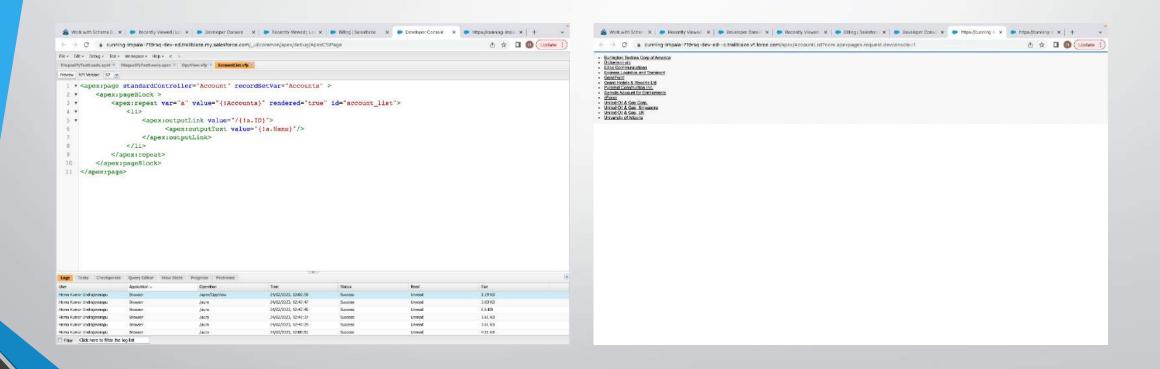




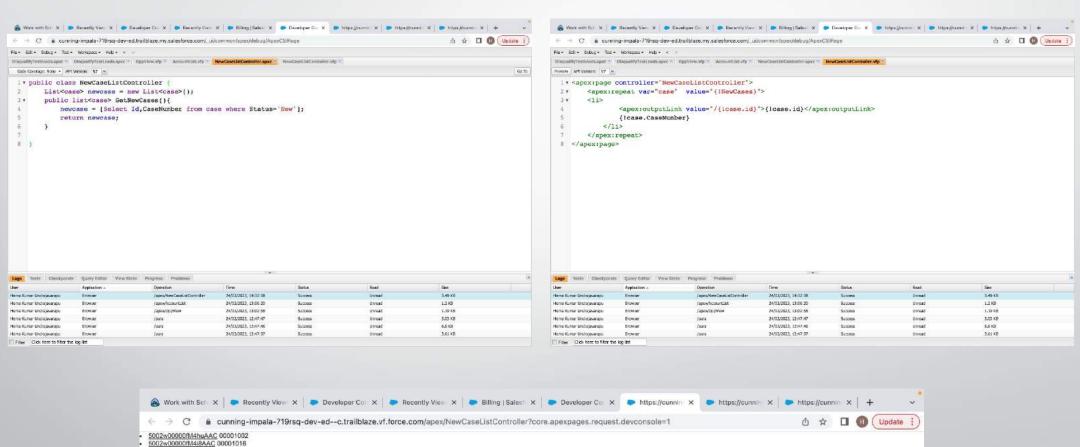
Create a Visualforce page which displays Opportunity fields as output fields.



Exercise 17 Create a Visualforce page which shows a list of Accounts linked to their record pages



Create a Visualforce page that uses a custom controller to display a list of cases with the status of 'New'. The page must be named NewCaseList.



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