

BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES (ADMIN)

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Step 1:

Creating Developer Org by using Developer Edition Link

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First Name* Last Name*

Email*

Role*

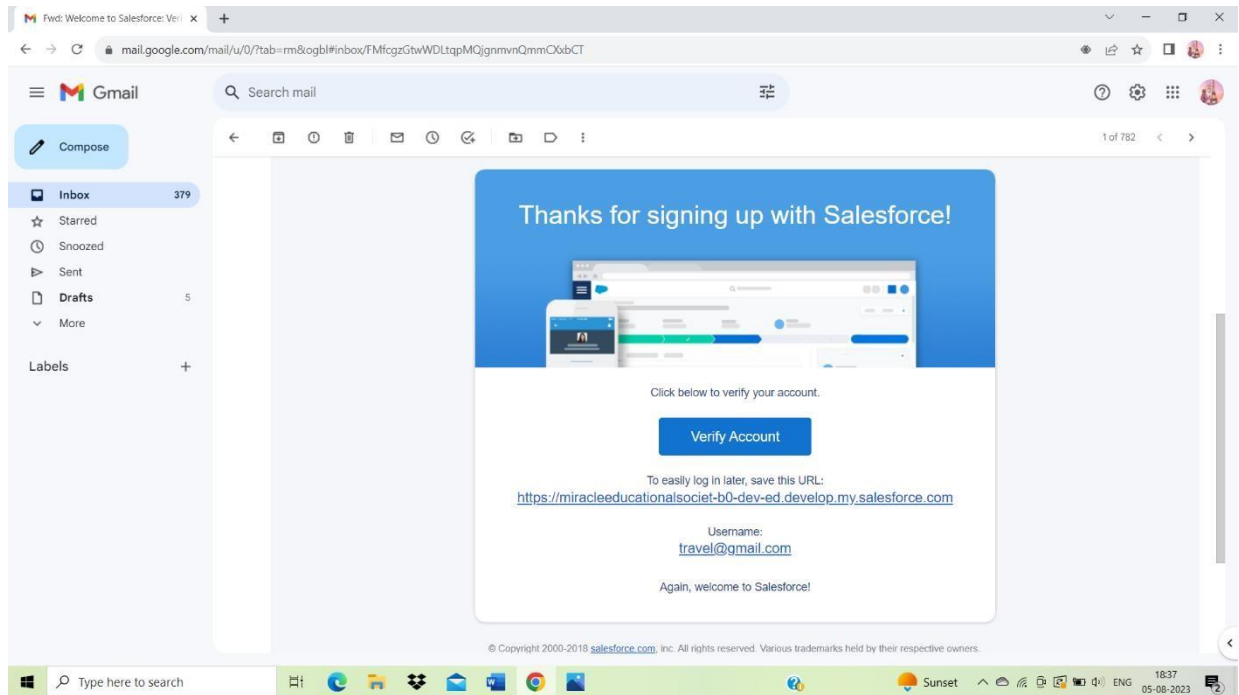
Company*

Country/Region*

Postal Code*

Username*

Step 2: Account Activation



We can create password by clicking verify Account then we can directly login to salesforce Account

Step 3: Creation Of Objects for Travel Approval App

We Can Create Developer Object in Object Manager by clicking on create - Custom Object and follow the steps in the guide

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

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

Content Name

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 Name Example: Account Name

In The Same Manner We have to Create Employee details , Expense, Expense items and Travel Approval Objects.

Step 4:

Creation of Custom Tab

Setup Tabs

New Custom Object Tab [Help for this Page](#)

Step 1: Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object

Tab Style

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

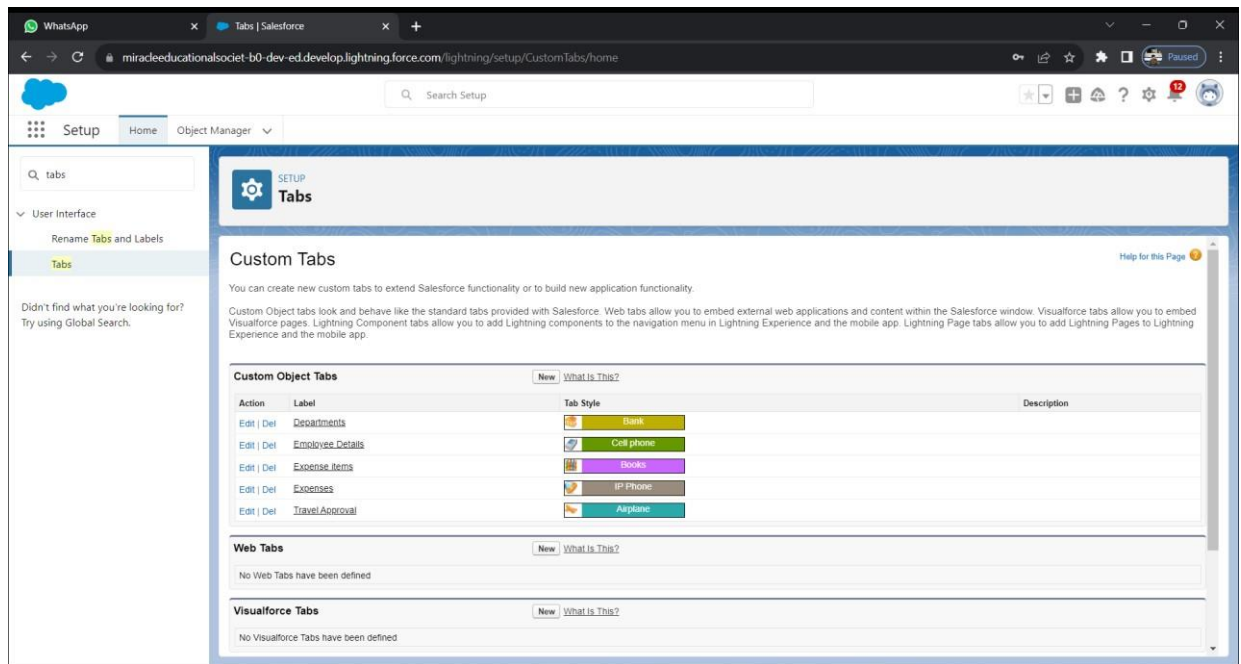
Splash Page Custom Link

Enter a short description.

Description

[Next](#) [Cancel](#)

Here We can create Tabs for our objects which we created earlier

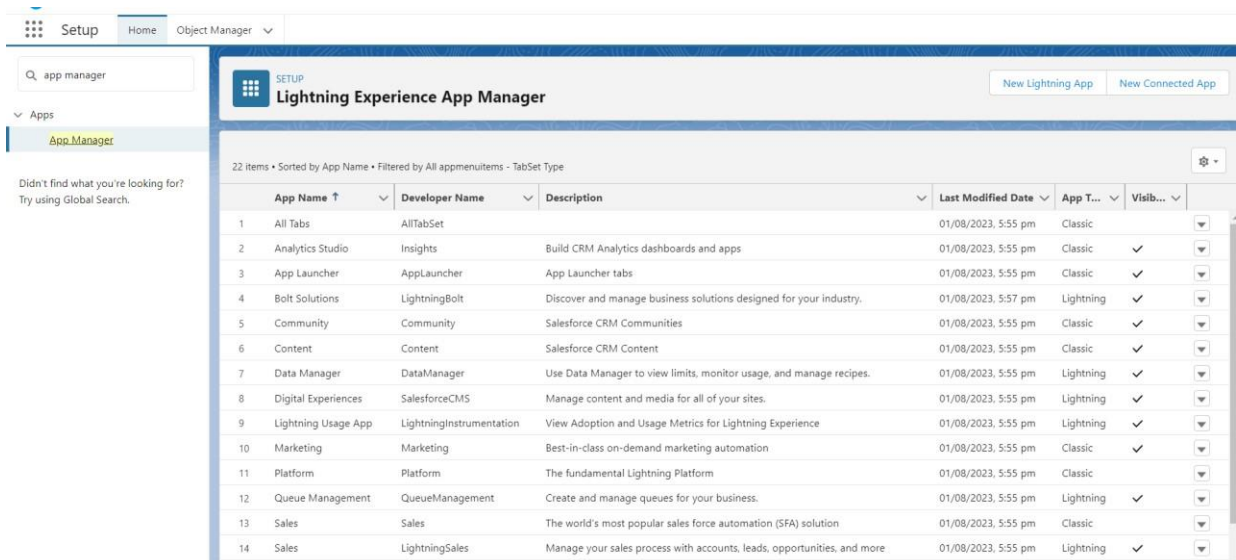


Step 5:

Create Travel Approval App (Lightning App)

Now We Can Create a New Lightning App by Using App Manager

Click New Lightning app



In those we Can Create a New lighting App

App Settings

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name [?]
Travel Approval

* Developer Name [?]
Travel_Approval

Description [?]
Enter a description...

App Branding

Image [?]
Upload

Primary Color Hex Value [?]
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

TA Travel Approval

We have to give the app name as Travel Approval

Leave the default items and click next until we find Available items

App Settings

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items [?] Create

Type to filter list...

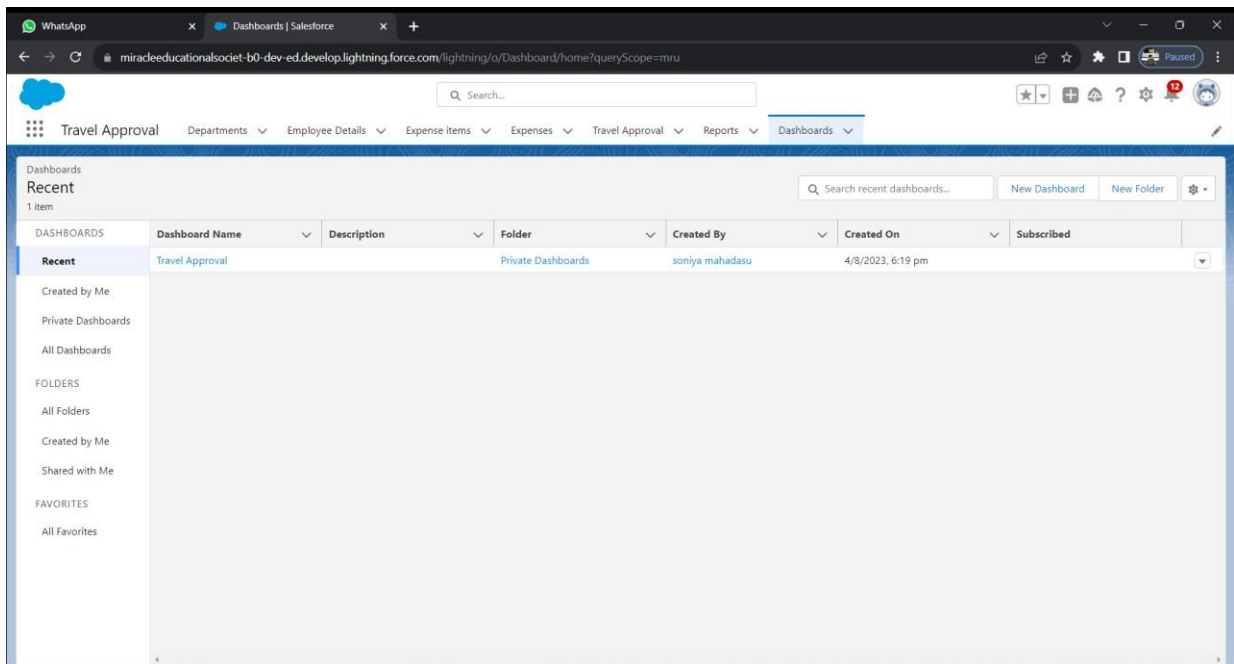
- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods

Selected Items

- Departments
- Employee Details
- Expenses
- Expense Items
- Travel Approvals
- Reports
- Dashboards

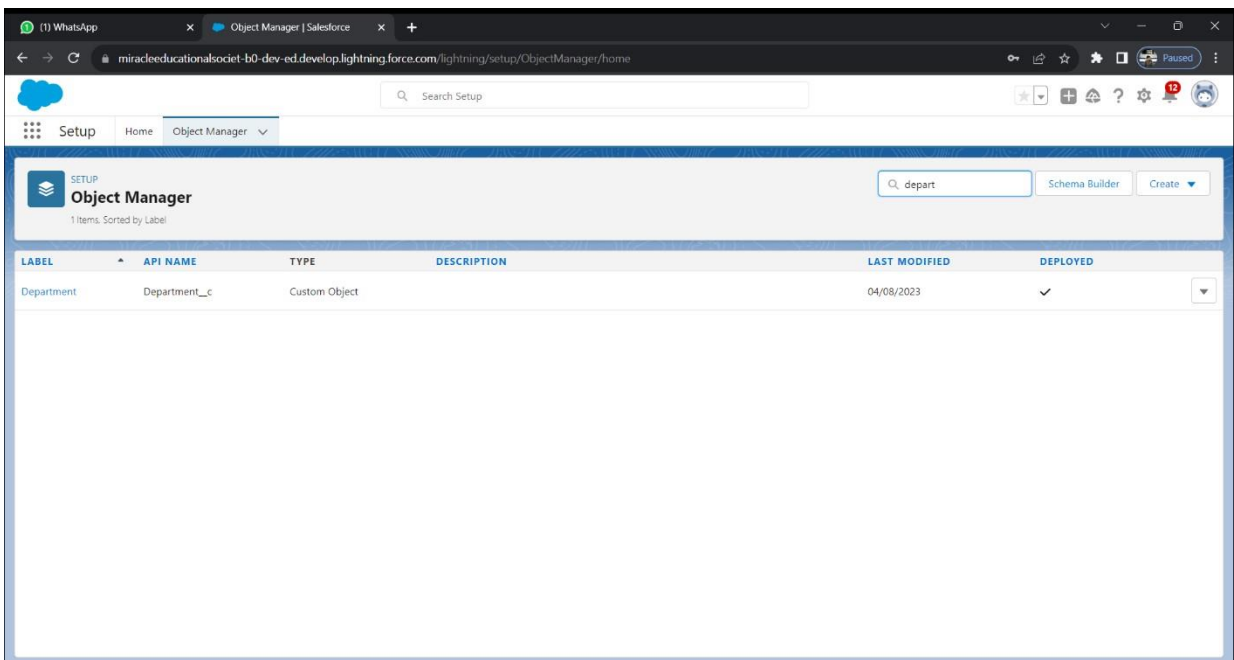
After moving the items to Selected items from Available Profile

Move the System Administrator into Selected Profiles and save



Step 6: Creation of fields for the objects we created earlier

In Those Manner We Can Create a Department Field Data



In department object fields and Relationships click on new
 Select Datatype this field is of text type and click next
 Fill the field name as Department code and length as 5

Later we can click next, next & save

The screenshot shows the Salesforce Setup interface for creating a new custom field for the 'Department' object. The page is titled 'New Custom Field' and is at 'Step 2. Enter the details'. The 'Field Label' is 'Department Code', 'Length' is '8', and 'Field Name' is 'Department_Code'. The 'Description' field is empty. The 'Help Text' field is empty. The 'Required' checkbox is checked, and the 'Unique' checkbox is also checked. The 'External ID' checkbox is unchecked. The 'Auto add to custom report type' checkbox is checked. The page includes a sidebar with navigation links like 'Details', 'Fields & Relationships', 'Page Layouts', etc.

Follow the above steps and create two more text type fields

District and State , provide length as 40 for both

Create URL type field and give School Website as the field label

In this We can create new look up data type on the fields & relationship

Later we can click on the Department object to the related object

The screenshot displays the Salesforce Lightning Setup interface. The browser address bar shows the URL: `miradeeducationalsociet-b0-dev-ed1.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000001k8We/FieldsAndRelationships/new`. The page title is "Setup". The left sidebar contains a navigation menu with the following items: "Details", "Fields & Relationships" (selected), "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", and "Scoping Rules". The main content area is titled "New Relationship" and shows "Step 2. Choose the related object". A dropdown menu is open, listing various object types, with "Department" selected. The interface includes a sidebar with navigation options like "Details", "Page Layouts", and "Lightning Record Pages". The main content area shows the "New Relationship" configuration for the "Department" object.

Then we can enter the next step we can add a field label name as Department

The screenshot shows the Salesforce Setup interface for the 'Department' object. The left sidebar contains a navigation menu with options like 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, and Scoping Rules. The main content area is titled 'New Relationship' and shows 'Step 3. Enter the label and name for the lookup field'. The form includes fields for 'Field Label' (Department), 'Field Name' (Department), 'Description', 'Help Text', 'Child Relationship Name' (Departments1), and a checkbox for 'Auto add to custom report type'. A 'Lookup Filter' section is also visible at the bottom.

Then click Next, Next, Save.

The screenshot shows the 'Fields & Relationships' page for the 'Department' object. It displays a table of 9 fields, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By, Currency, Department, Department Code, Department Name, District, Last Modified By, Owner, and State.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Department	Department__c	Lookup(Department)		✓
Department Code	Department_Code__c	Text(5)		
Department Name	Name	Text(80)		✓
District	District__c	Text(40)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓
State	State__c	Text(40)		

In those way we can create all the fields on Department, Employee details, Expense, Expense items and Travel Approval objects by using the given datatypes in the data(Text,Lookup,Roolup summary,pick List,date)

Step 7:

Import Departments Data

To import data before we have to create a department csv file as shown in the data. In quick find click on data import wizard in that click on launch wizard and carefully follow the steps from the data

The screenshot shows the Salesforce Data Import Wizard interface. The browser address bar indicates the URL: `miraeeducationalsociet-b0-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home`. The page title is "Import your Data into Salesforce". Below the title, it says "You can import up to 50,000 records at a time." and "Help for this page".

The interface is divided into three main sections:

- What kind of data are you importing?**: This section has two tabs: "Standard objects" and "Custom objects". Under "Standard objects", "Departments" is selected with a green checkmark. Other options include "Employee Details", "Expense items", and "Expenses".
- What do you want to do?**: This section has three options: "Add new records" (selected with a green checkmark), "Update existing records", and "Delete records". Under "Add new records", there are dropdown menus for "Match by:" (set to "--None--"), "Which User field in your file designates record owners?" (set to "--None--"), and "Which Department field in your file do you want to match against to set the Department lookup field?" (set to "--None--"). There is also a checkbox for "Trigger workflow rules and processes?".
- Where is your data located?**: This section has a "Drag CSV file here to upload" area. Below this, there is a "CSV" section with a "File" dropdown (set to "Choose File"), a "Character Code" dropdown (set to "ISO-8859-1 (General US & Western European, ISO-LATIN-1)"), and a "Values Separated By" dropdown (set to "Comma").

At the bottom right, there are buttons for "Cancel", "Previous", and "Next".

After choosing the csv file do mapping carefully and click next ,start import and click ok on the popup.

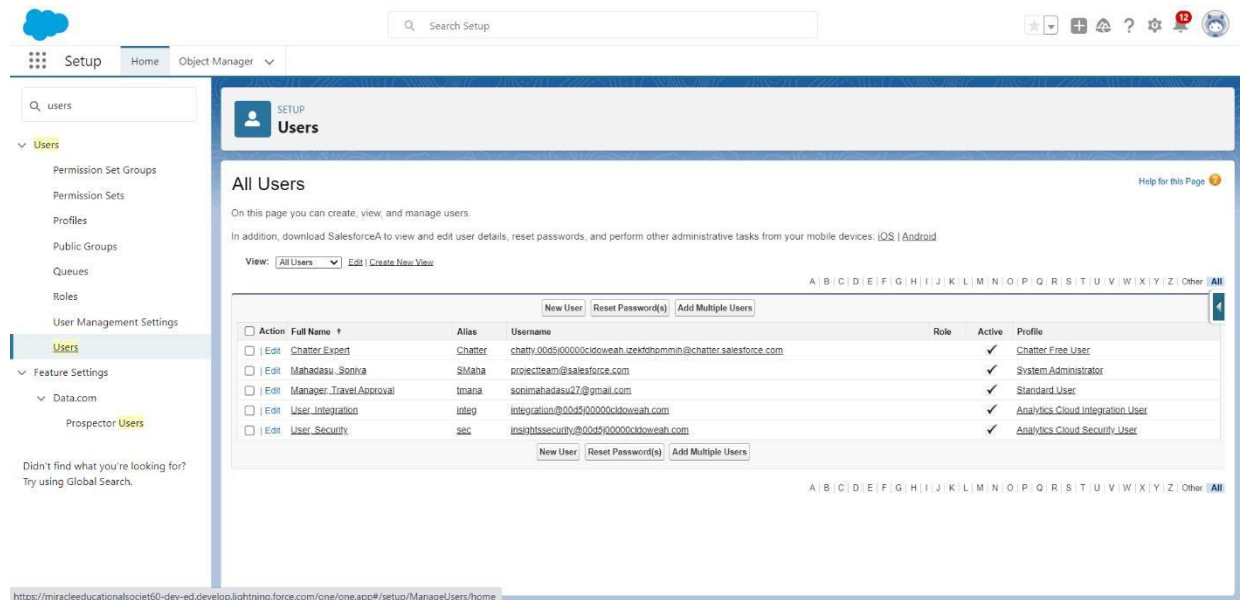
The screenshot shows the Salesforce Bulk Data Load Jobs interface. The browser address bar indicates the URL: `miraeeducationalsociet-b0-dev-ed.develop.lightning.force.com/one/one.app#/setup/AsyncApiJobStatus/home`. The page title is "Monitor Bulk Data Load Jobs". Below the title, it says "Monitor the status of recent bulk data load jobs. These jobs are created by Data Loader and other Bulk API client applications." and "Help for this Page".

The interface is divided into two main sections:

- Quota**: This section shows the organization's quota for bulk data load jobs. It states: "Your organization has processed 0 batches in the last 24 hours. Your organization can process 16,000 batches in a 24-hour period." It also shows resource usage: "Resource used in the last 24 hours: CPU: 78 milliseconds, IO: 197 bytes, Disk: 3,306 bytes".
- In Progress**: This section shows a table of jobs that are currently in progress. The table has columns: Job ID, Submitted By, Start Time, Status, Job Type, Operation, Object, Records Processed, Records Failed, and Progress. There are no records displayed.
- Completed last 7 days**: This section shows a table of jobs that have been completed in the last 7 days. The table has columns: Job ID, Submitted By, Start Time, End Time, Status, Job Type, Operation, Object, Records Processed, Records Failed, and Time to Complete (hh:mm:ss). There are three records displayed.

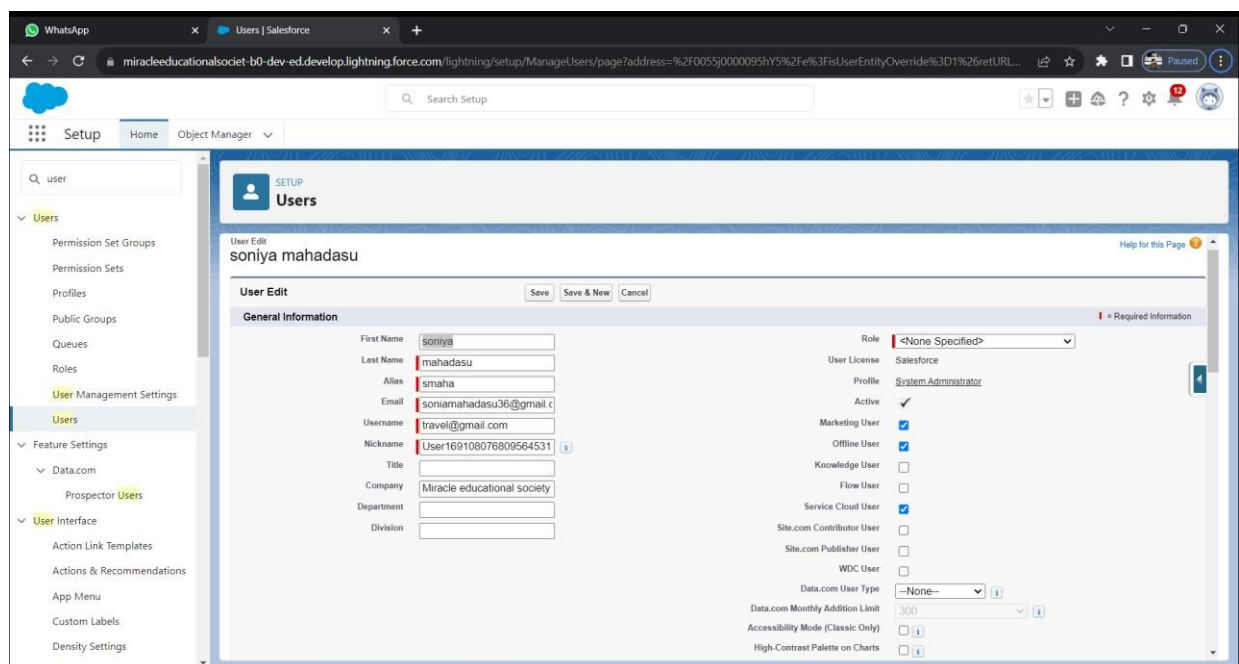
Job ID	Submitted By	Start Time	End Time	Status	Job Type	Operation	Object	Records Processed	Records Failed	Time to Complete (hh:mm:ss)
7505f02000F0JW	mahadasu_sooliya	04/08/2023, 5:50 pm	04/08/2023, 5:50 pm	Closed	Bulk V1	Insert	Department	16	16	00:00
7505f02000F0JT	mahadasu_sooliya	04/08/2023, 5:40 pm	04/08/2023, 5:40 pm	Closed	Bulk V1	Insert	Department	16	16	00:00
7505f02000F0JT3	mahadasu_sooliya	03/08/2023, 11:49 pm	03/08/2023, 11:49 pm	Closed	Bulk V1	Insert	Department	4	0	00:00

In the users we can be create a user in those we can click on the home and click on the quick find box then enter user then click on the new user



We can enter the first name last name and username

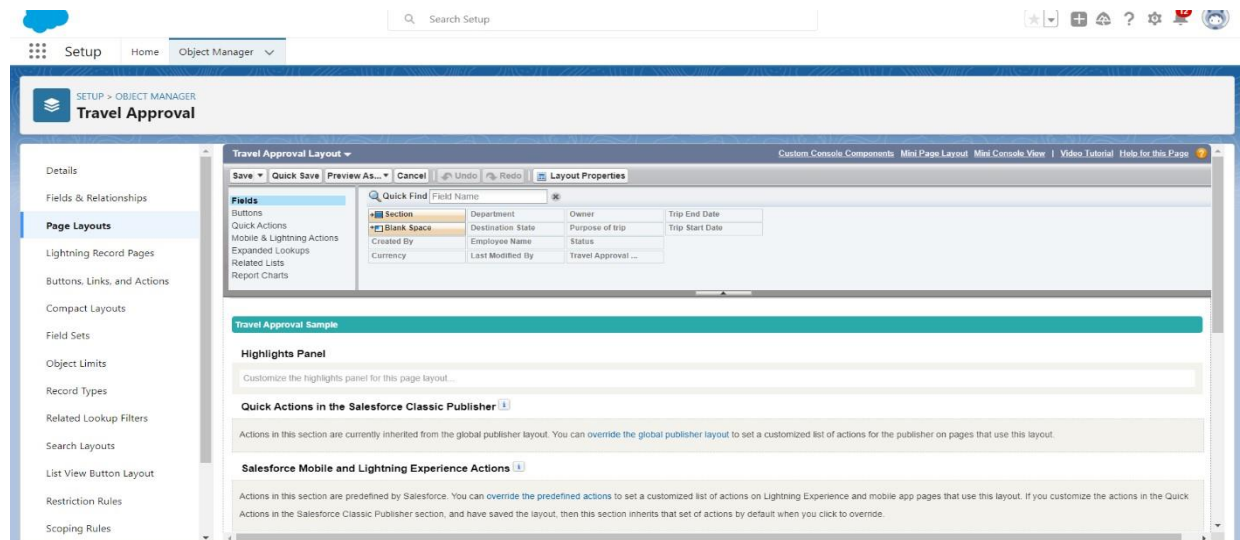
Click on the user licence as salesforce and profile as standard user



And click on the generate new password for login users of the data

Step 9: Customize Travel Approval Object Page layout

To customize page layout go to object manager and select Travel Approval object in that click on page layouts and click travel approval layout

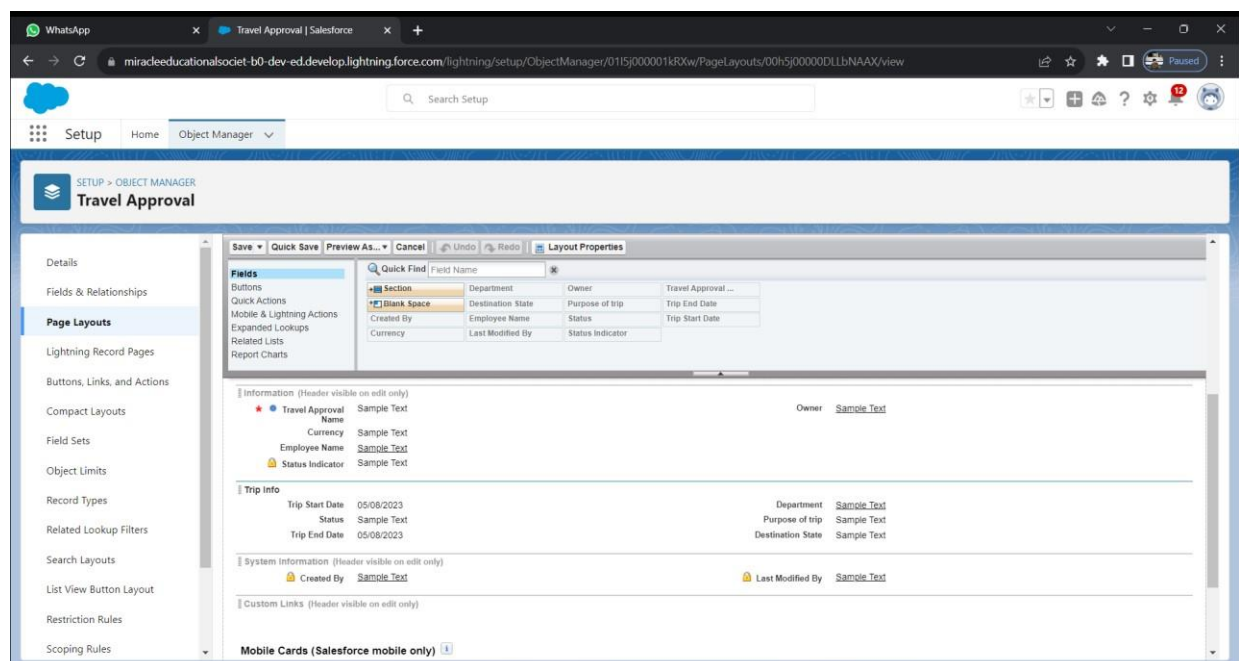


Drag the section from the top and place below the information section

Name the section as Trip info and click ok

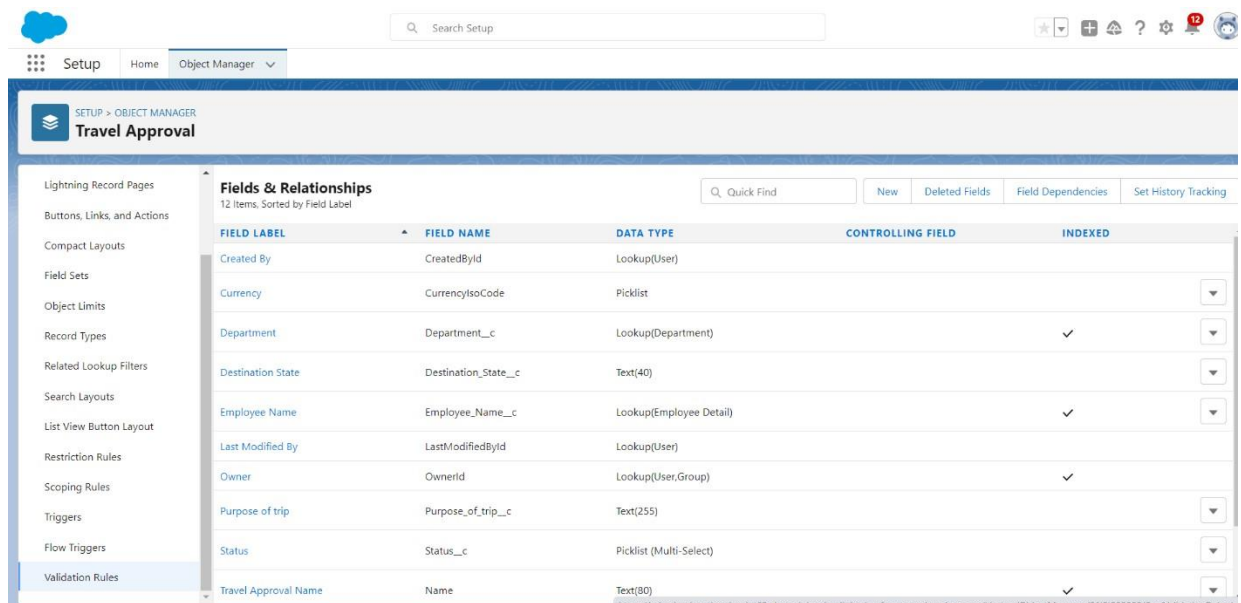
Then drag Trip start date ,Trip end date and status from top to Trip info

Later drag Destination state and purpose of a trip to Trip info,save.



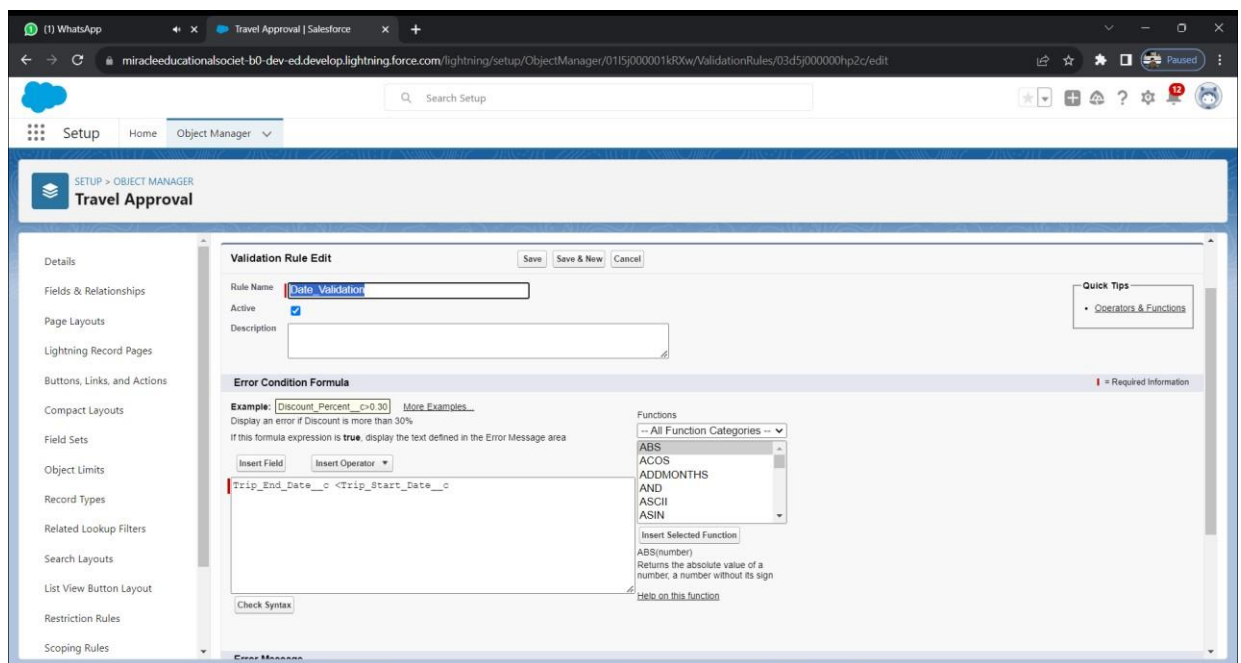
Step :10: Create Validation Rule

From object manager search for Travel Approval object open validation rule and click on new



Give the rule name as Date_Validation and active should be checked

Enter formula from data check no errors after input this condition

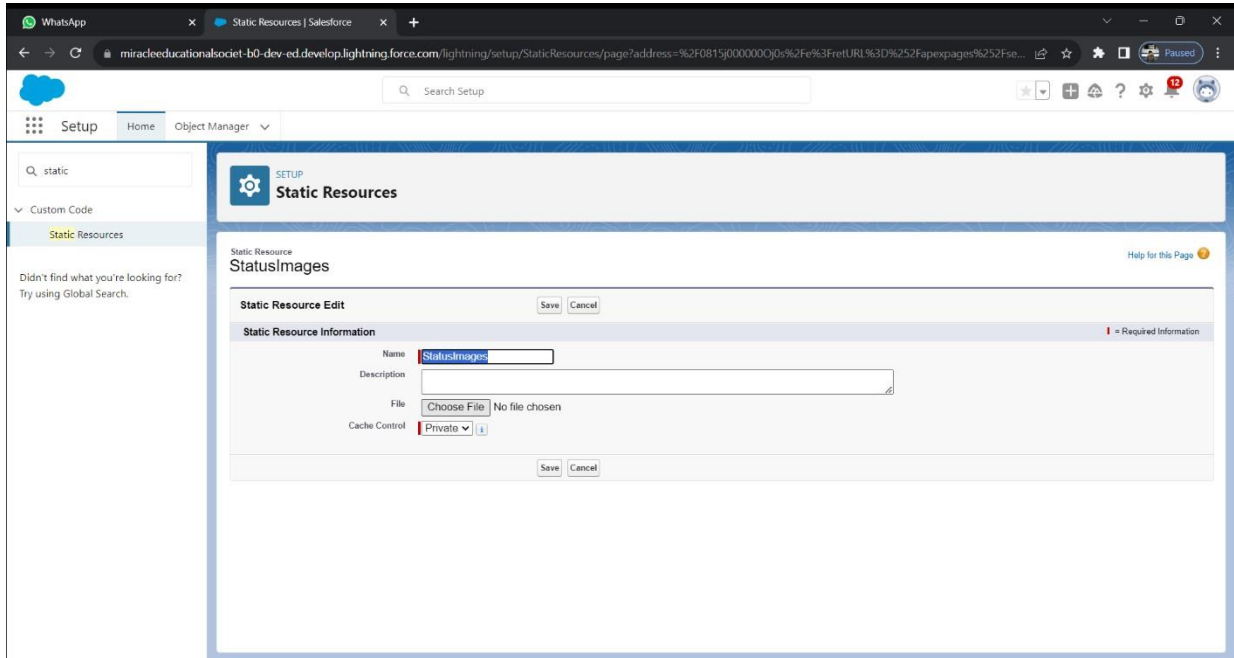


Give the error message and click on save

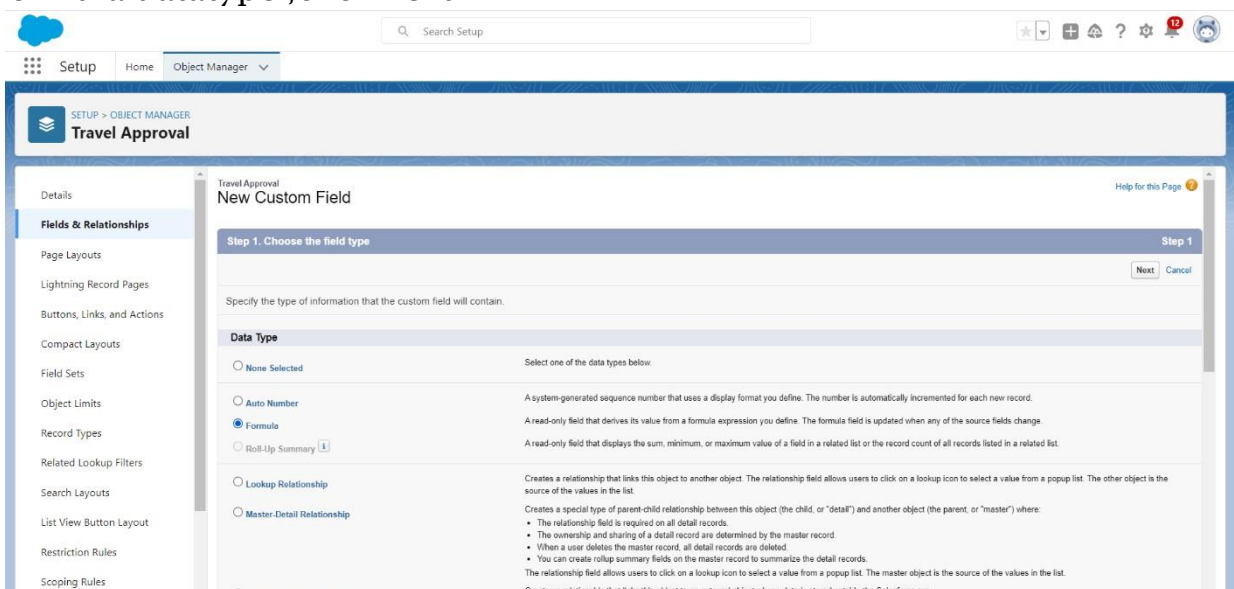
Step 11: Create Formula Field

To create formulae field first we need a Zip file that contains statusimages.Zip .In setup click on static Resources and click new

Enter name as StatusImages and choose the zip file ,save



Select Travel Approval object Fields and Relationships click new select formula datatype ,click next



Enter the values from data and check there is no errors in formula

Setup > OBJECT MANAGER

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

Scoping Rules

Field Name: **Status Indicator**

Description

Help Text

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen

Formula Options

Formula Return Type: Text

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example: { Full Name = LastName & ", " & FirstName } [More Examples](#)

Simple Formula | **Advanced Formula**

Select Field Type: Travel Approval | Insert Merge Field --

Insert Operator

Status Indicator (Text) =

```
IF( ISPICONVAL( Status__c, 'Approved'), IMAGE("/resource/statusImages/chumbs-up.png", "Accepted", 20, 20), IF( ISPICONVAL( Status__c, 'Rejected'), IMAGE("/resource/statusImages/chumbs-down.png", "Rejected", 20, 20), IMAGE("/resource/statusImages/draft.png", "In-Process", 20, 20) ) )
```

Quick Tips: Getting Started, Operators & Functions

Click next ,next and save

Step 12:

Create,View and Delete Records

Create Records:

Now click on the app launcher on the left side of the screen

Click the Travel Approval on the app launcher

Click reports tab new reports and select report type as Trave Approval
 With Departments click start Report ,then proceed as in the data

Travel Approval

Departments

Employee Details

Expenses

Expense items

Travel Approvals

Reports

Dashboards

Search...

Recent

3 items

Search recent reports...

New Report

New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Travel Approval Report		Private Reports	Soniya Mahadasu	2/8/2023, 11:45 am	

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

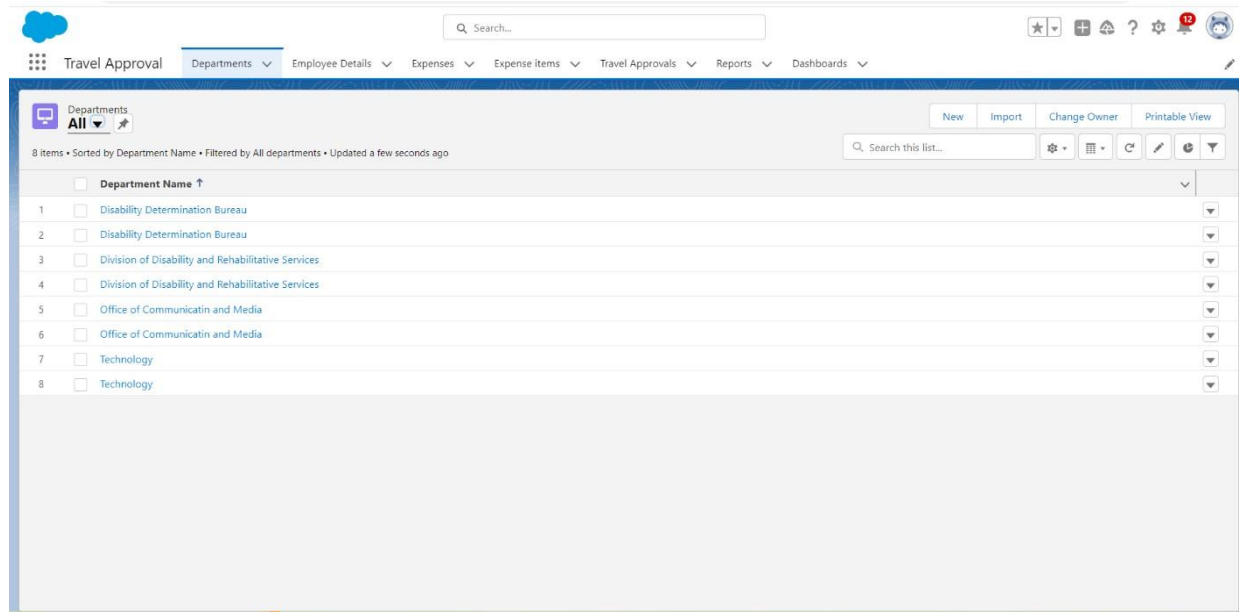
Shared with Me

FAVORITES

All Favorites

After clicking save and run give report name as Travel Approval Reports
View Records :

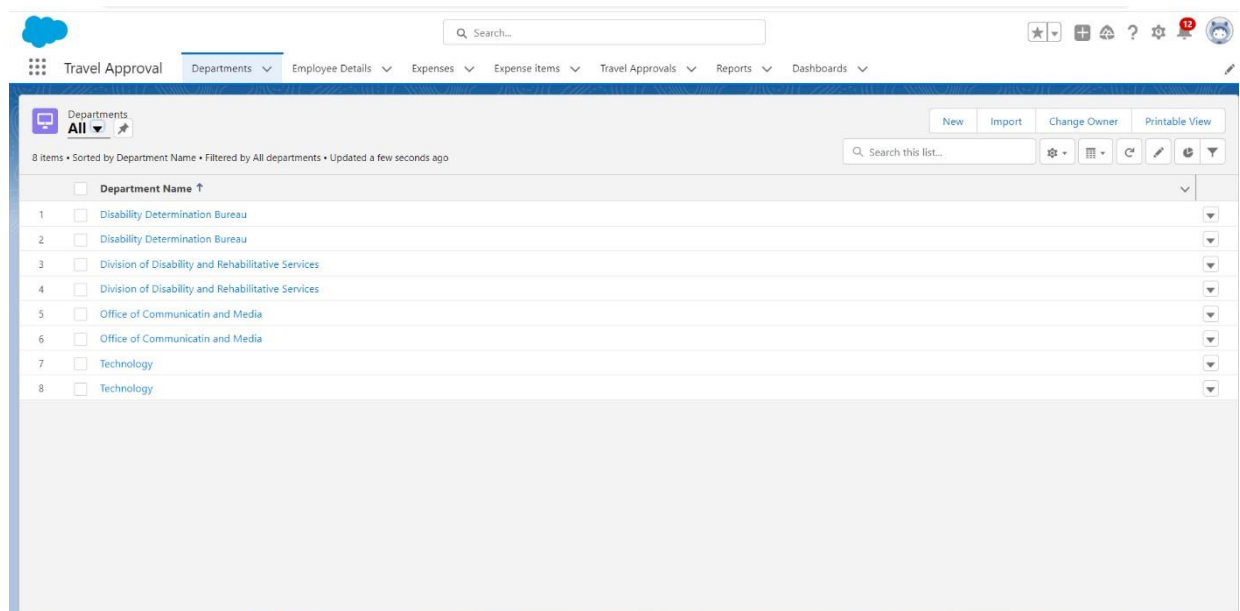
Then we can view the created records on the Department Fielads



Delete Records :

We can click on the app launcher and search as Trave Approval

We can delete the fields on the created data



In those we can delete the records on the object by clicking the arrow at Right-hand side on that record click delete and delete again .

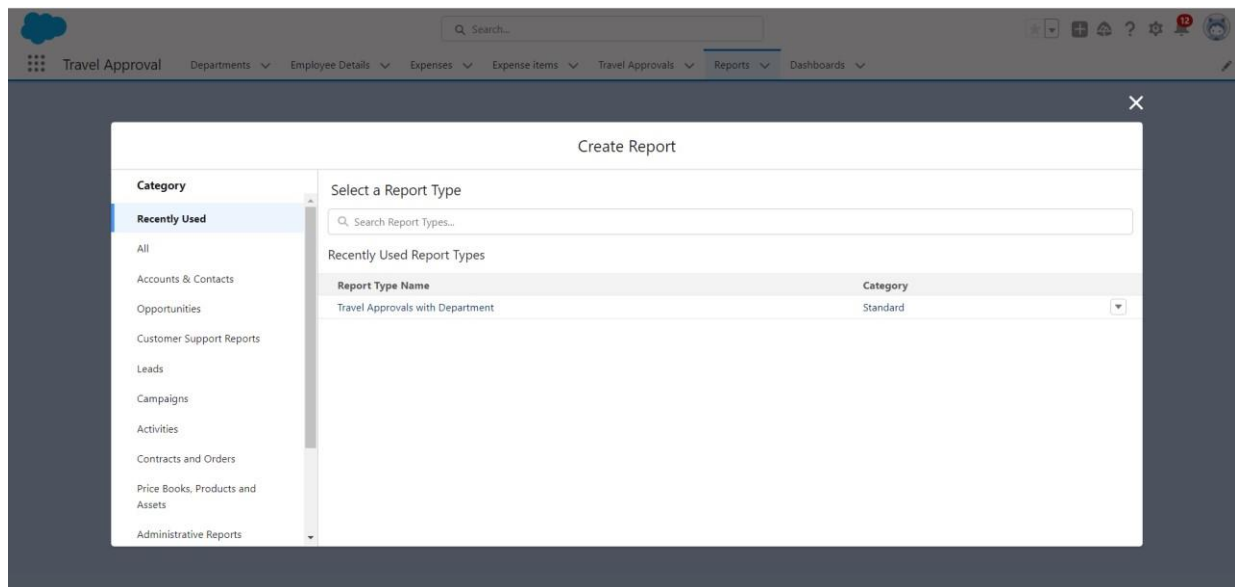
Step 13:

Create and view Reports

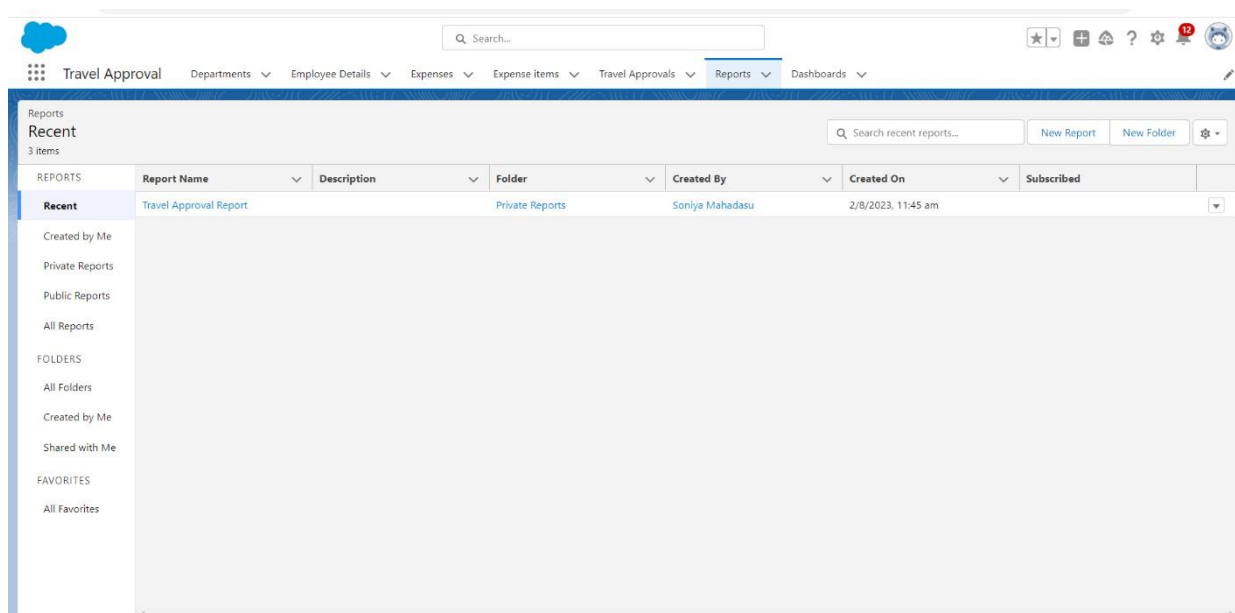
Create Report:

We can click on the app launcher and search as Trave Approval

Click on the reports tab and click on the new report

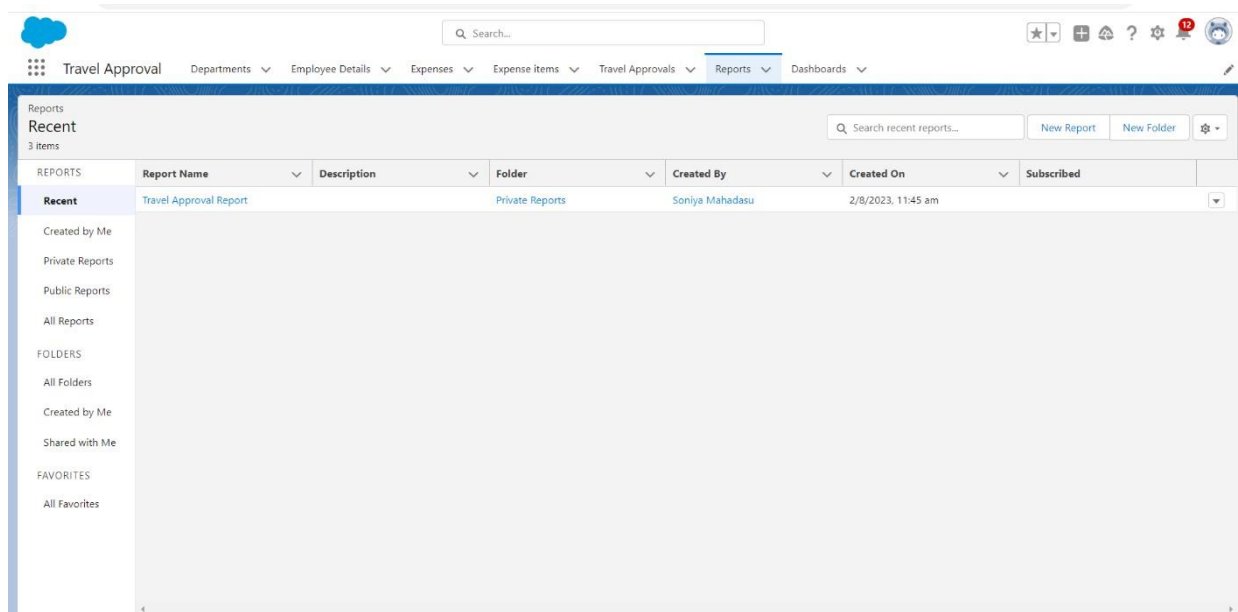


Click on report type as Travel Approval With Departments And click on start report customize your report ,select Department Name click refresh Save and run



At last give the report name as Travel Approval Report,click save

View Report : click on the app launcher and search as Travel Approval App on the reports tab

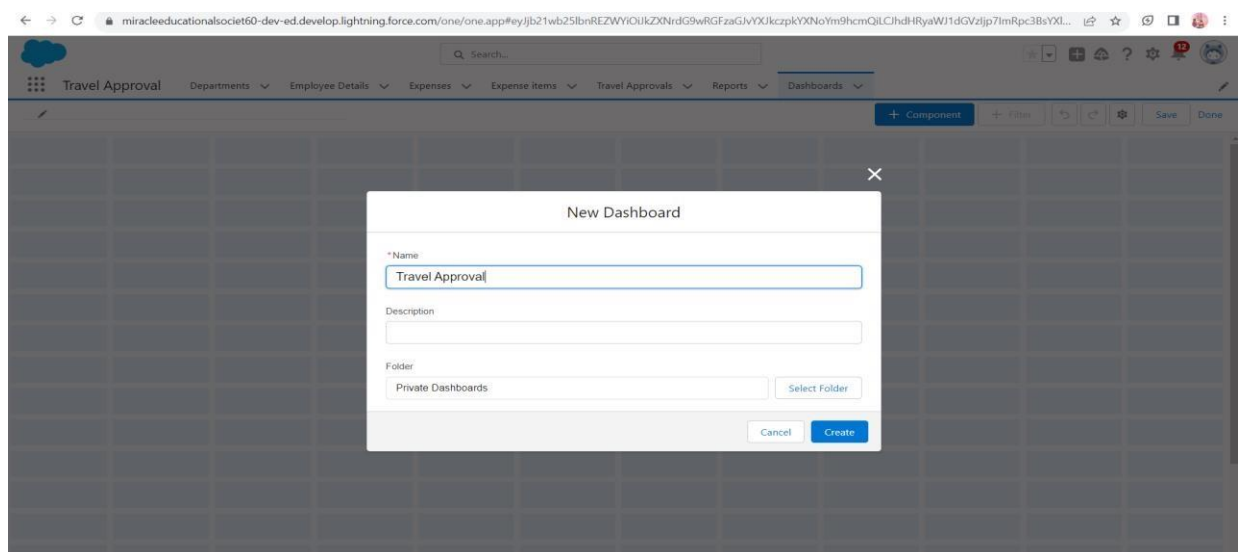


we can check the reports tab

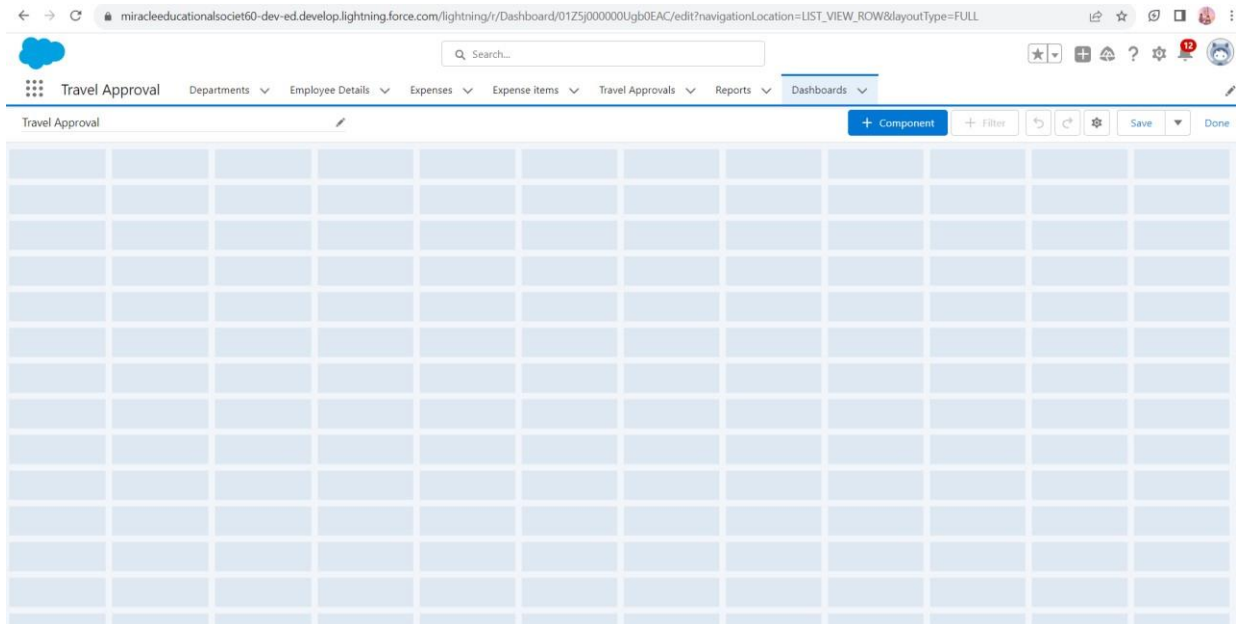
Step 14

Create Dashboard

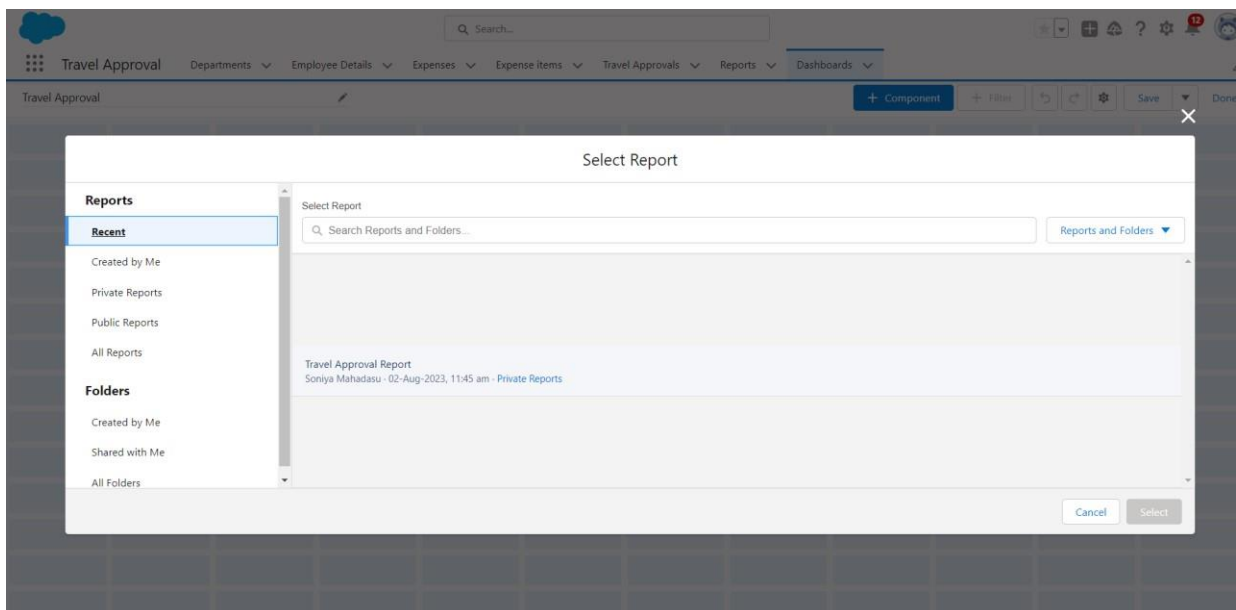
click on the app launcher and search as Travel Approval we click on the dashboard and create a new dashboard with the name of Travel Approval



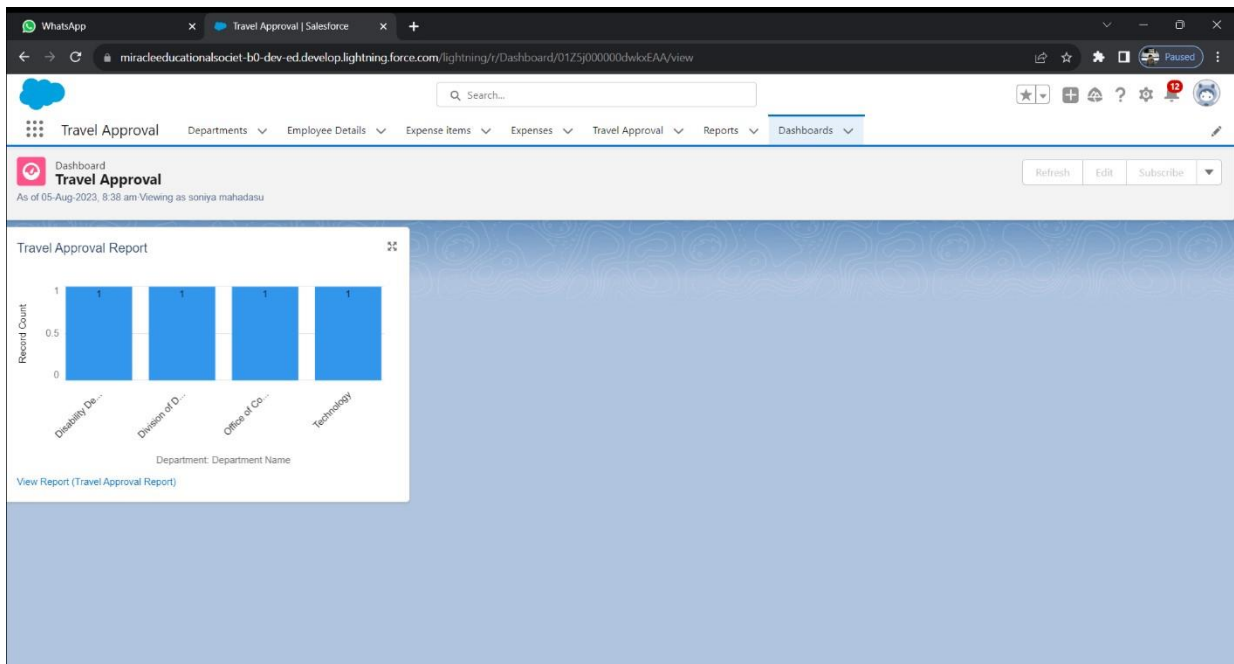
Then we can click on the + component and create a dashboard data



Select Travel Approval Report that you created



Later we click on the report we select the data on the field



Then click on the finish it will be created

Step 15:

View Dashboards

click on the app launcher and search as Travel Approval click on the dashboard tab and we can check the dashboards click on Travel Approval and See graph view of records

