



BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES



**SALESFORECE NAAN MUDHALVAN
PROJECT REPORT**

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in

COMPUTER SCIENCE AND BUSINESS SYSTEMS

**KNOWLEDGE INSTITUTE OF TECHNOLOGY,
SALEM-637504**

BONAFIDE CERTIFICATE

Certified that this project report titled “**BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES**” is the Bonafide work of “**SOWMIYA N(611220244039), GAYATHRI S(611220244007), HEMASHREE V(611220244011), KIRUTHIKA S(611220244019)**” who carried out the project work under my supervision.

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ACKNOWLEDGEMENT

At the outset, we express our heartfelt gratitude to **GOD**, who has been our strength to bring this project to light.

At this pleasing moment of having successfully completed our project, we wish to convey our sincere thanks and gratitude to our beloved president **Mr. C. Balakrishnan**, who has provided all the facilities to us. We would like to convey our sincere thanks to our beloved Principal **Dr. PSS. Srinivasan**, for forwarding us to do our project and offering adequate duration in completing our project.

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1.INTRODUCTION

Salesforce, a leading cloud-based Customer Relationship Management (CRM) platform, is a pivotal tool for organizations to manage customer data, optimize sales processes, and elevate customer interactions. Its multifaceted features include Sales Cloud, which enhances sales management through lead tracking, opportunity management, and seamless email integration. Service Cloud focuses on exceptional customer support, featuring case management, knowledge base development, and multi-channel support. Marketing Cloud empowers businesses with marketing automation, email campaigns, social media engagement, and in-depth analytics. Salesforce's hallmark is its customizability, allowing businesses to tailor the platform to meet specific requirements, while robust integration capabilities facilitate seamless connections with other business applications.

The platform equips businesses with powerful reporting and analytics tools, enabling data-driven decisions and insightful, customized reports and dashboards. Salesforce ensures mobile accessibility, enabling users to stay connected and productive while on the move. A paramount emphasis on data security and compliance guarantees data protection and privacy. Whether you're a small start-up or a large enterprise, Salesforce offers scalability to accommodate your evolving needs.

Through Salesforce, organizations foster improved customer relationships, increased sales efficiency, and superior customer support. It empowers businesses to make data-driven decisions, streamline operations, and create impactful, targeted marketing campaigns. This introduction encapsulates Salesforce's capabilities and benefits, offering a concise overview for your project document, allowing for a better understanding of how the platform can contribute to your specific project goals.

2.PROJECT SPECIFICATIONS

2.1 Project Goal:

The primary goal of the Employee Travel Approval Application in Salesforce for corporates is to optimize and streamline the management of employee travel requests and approvals. The project aims to provide a user-friendly and efficient solution that automates approval workflows, ensures real-time visibility and notifications, and simplifies expense tracking and reimbursement. User training and support are essential for ensuring adoption, and the application should be scalable and highly customizable to meet evolving organizational needs. Overall, the project's focus is on enhancing productivity, cost control, and compliance with corporate policies in the realm of travel management.

2.2 Project Scope

- **User Registration (Milestone 1):**
Establish a registration portal to input and verify employee details, managers, approvers, and administrative personnel.
- **Tabs Creation (Milestone 2):**
Tabs will be configured to segment and simplify access to different sections of the application, such as travel requests, approvals, feedback, and reporting.
- **App Creation (Milestone 3):**
The Employee Travel Approval Application will be launched, serving as the primary hub for submitting, reviewing, and approving corporate travel.
- **Fields & Relationships (Milestone 4):**
Custom fields and relationships will be defined to capture travel details like destination, dates, expenses, and justifications. Relationships between employees, managers,

and travel modules will be structured to streamline the approval chain.

- **Profile Configuration (Milestone 5):**

User profiles will be set up to dictate roles, access permissions, and interaction levels within the application.

- **Role and Role Hierarchy (Milestone 6):**

The platform will structure role-based access controls to specify who can view, edit, or approve travel requests, with hierarchies such as junior employees, senior employees, team leads, and department heads.

- **Users Management (Milestone 7):**

Users will be added and configured based on their roles within the organization. This step involves determining the permissions and access levels for each user category.

- **Sharing Rules (Milestone 8):**

Predefined criteria will inform sharing rules, ensuring data is appropriately shared and accessed, maintaining confidentiality where needed.

- **User Adoption Strategies (Milestone 9):**

Tools, training sessions, and guides will be introduced to ensure users can efficiently utilize the application. Feedback loops will be set up to continually enhance user experience.

- **Reports Generation (Milestone 10):**

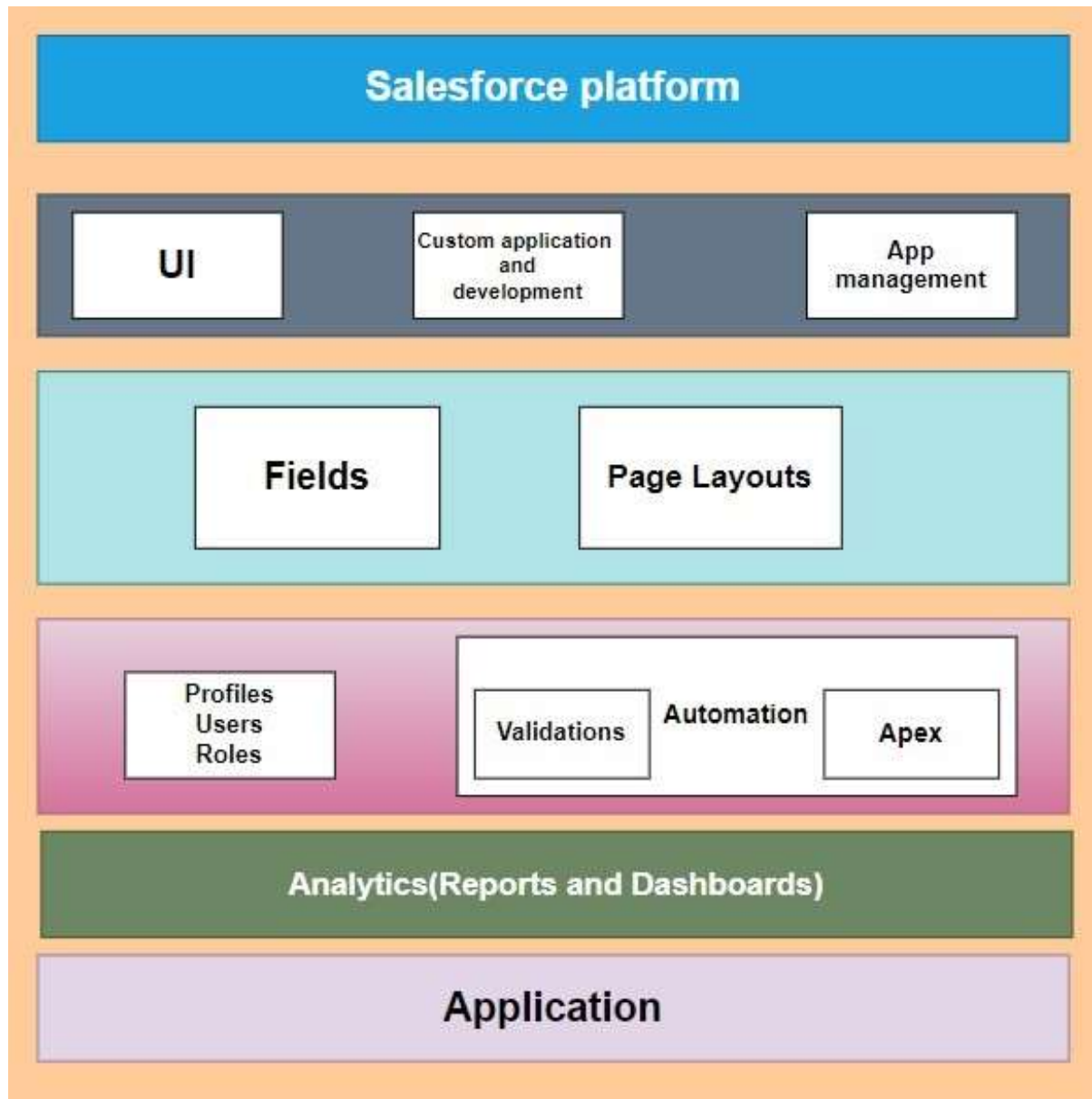
Custom reports will be developed, offering stakeholders insights into travel trends, expenses, approval durations, and policy adherence.

- **Dashboards Development (Milestone 11):**

Visual dashboards will be designed, showcasing KPIs, travel analytics, and summary reports for a swift overview and decision-making.

- The project is set to deliver a unified solution for corporates, turning the travel approval process into a strategic, transparent, and efficient function.

2.3 Technical Requirements



2.4 Functional Requirements

- **User Registration and Authentication:** Provide a registration and login system for employees, approvers, and administrators to access the application securely.
- **Travel Request Submission:** Allow employees to submit travel requests, providing essential details such as travel dates, destinations, purpose, and estimated expenses.
- **Customizable Approval Workflows:** Support the configuration of approval workflows, including the ability to set approval criteria, create multi-level approval hierarchies, and define routing rules.
- **Real-time Notifications:** Automate email notifications to keep employees informed about the status of their travel requests and notify approvers when their input is required.
- **Expense Tracking:** Enable employees to record and track travel-related expenses, categorizing them for easy reference and reimbursement.
- **Approval Management:** Provide a dashboard for approvers to review and approve travel requests, with the ability to leave comments or request additional information.
- **Reporting and Analytics:** Offer a suite of reporting tools to generate insights into travel expenses, approval trends, and policy compliance. These reports should be customizable and accessible to authorized users.
- **Mobile Accessibility:** Ensure that the application is accessible on mobile devices, allowing users to submit requests and perform approvals on the go.
- **Security and Access Control:** Implement robust security measures and role-based access control to protect sensitive travel data and ensure that only authorized personnel can access, edit, and approve travel requests.
- **Integration Capabilities:** Support integration with other corporate systems, such as accounting and HR software, to

streamline expense tracking, data sharing, and synchronization of travel data.

- **User Training and Support:** Provide training materials and support resources for users and approvers to ensure they can navigate and utilize the application effectively.
- **Scalability and Customization:** Design the application to be highly scalable, allowing it to adapt to the evolving needs of the organization. Ensure it can be customized to accommodate specific workflows and policies.
- **Compliance Features:** Include features to ensure compliance with corporate and regulatory policies, including the ability to capture and store necessary documentation for audits.
- **Budget Management:** Implement tools for tracking and managing travel budgets, helping organizations stay within financial limits.
- **Expense Reimbursement:** Facilitate the expense reimbursement process by allowing approvers to verify expenses and trigger reimbursement to employees.
- **User Profiles and Roles:** Define user profiles and roles to determine who can perform specific actions within the application.
- **Approval History and Audit Trail:** Maintain an audit trail and history of all travel requests, approvals, and changes for transparency and accountability.
- **Notifications and Reminders:** Send automated reminders and notifications to users for pending actions, approvals, and upcoming trips.
- **Document Management:** Provide a repository for storing travel-related documents, such as itineraries, receipts, and approvals.
- **Multi-platform Support:** Ensure compatibility with various web browsers and devices, enhancing user accessibility.

3.PREPARATION DATA MODELING

Objects:

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types:

1.Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

In This Application We Use 9 Standard Objects:

1. Account
2. Contact.
3. Opportunity
4. Lead.
5. Case
6. Task and Event
7. User
8. Product
9. Custom Object.

2.Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

In This Application We Use 5 Custom Objects:

1. Employee Details
2. Expense
3. Expense Item
4. Travel Approval

1)Create A Custom Object for Employee Details:

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Click the "Gear" icon and select "Setup" to access the Salesforce Setup menu.

Step 3: In Setup, find "Objects" and select "Object Manager."

Step 4: Click the "Create" button to create a new custom object.

Step 5: Object Settings

Label: Enter "Employee Detail."

Plural Label: Enter "Employee Details."

Step 6: Choose to auto-number records or manually specify the record name as "Employee Name."

Step 7: Select "Text" as the data type for the record name.

Step 8: Ensure "Deployed" is selected for deployment status.

Select "Allow Search" for search status

Step 9: In the "Optional Features" section, check "Allow Reports" and "Track Field History."

Step 10: Click "Save" to create the "Employee Detail" object.

smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01150000003gh4/edit/address=%2F01150000003gh4%2Fv%3FretURL%3D...

Search Setup

Setup Home Object Manager

Employee Detail

Details

- Field & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

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 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

Context Name

Enter Record Name Label and Format

smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01150000003gh4/FieldsAndRelationships/01150000003ACd/edit

Search Setup

Setup Home Object Manager

Employee Detail

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

Field & Relationships

Field Information

Field Label Date Type: Date

Field Name

Description

Help Text

Date Format: User

Field Usage:

Date Accessibility Level:

Compliance Categorization

Available

Chosen

PI

HIPAA

GDPR

BCI

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01150000001qN/FieldsAndRelationships/00NS00000ACId/view

Search Setup

Setup Home Object Manager

SETUP • OBJECT MANAGER

Employee Detail

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

Employee Detail Custom Field

Date of Birth

Back to Employee Detail

Validation Rules (0)

Custom Field Definition Detail

Edit Set Field Level Security View Field Accessibility Where is this used?

Field Information		Object Name	Employee Detail
Field Label	Date of Birth	Date Type	Date
Field Name	Date_of_Birth		
API Name	Date_of_Birth__c		
Description			
Help Text			
Data Owner			
Field Image			
Date Sensitivity Level			
Compliance Categorization			
Created By	GAJATHRI SUBRAMANIAM 17/10/2023 11:38 am	Modified By	GAJATHRI SUBRAMANIAM 17/10/2023 11:38 am

General Options

Required ☐

Default Value

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01150000001qN/FieldsAndRelationships/00NS00000ACId/view

Search Setup

Setup Home Object Manager

SETUP • OBJECT MANAGER

Employee Detail

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

Employee Detail Custom Field

Gender

Back to Employee Detail

Validation Rules (0)

Custom Field Definition Detail

Edit Set Field Level Security View Field Accessibility Where is this used?

Field Information		Object Name	Employee Detail
Field Label	Gender	Date Type	Picklist
Field Name	Gender		
API Name	Gender__c		
Description			
Help Text			
Data Owner			
Field Image			
Date Sensitivity Level			
Compliance Categorization			
Created By	GAJATHRI SUBRAMANIAM 17/10/2023 11:57 am	Modified By	GAJATHRI SUBRAMANIAM 17/10/2023 11:57 am

General Options

Required ☐

Default Value

smartbridge-14-dev-ed.develop.lightning.force.com/lightning/setup/CustomFields/015000003qN4TwzduAndRelationships/00N5000014Cucw0

Search Setup

Setup Home Object Manager

SETUP + OBJECT MANAGER Employee Detail

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

Employee Detail Custom Field

Employee Id

Help for this Page

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label: Employee Id Data Type: Text

Field Name: Employee_ID

Description:

Help Text:

Date Owner: User

Field Usage: -None-

Date Security Level: -None-

Compliance Categorization:

Available: PI, HIPAA, GDPR, etc.

Chosen:

smartbridge-14-dev-ed.develop.lightning.force.com/lightning/setup/CustomFields/015000003qN4TwzduAndRelationships/00N5000014Cucw0/view

Search Setup

Setup Home Object Manager

SETUP + OBJECT MANAGER Employee Detail

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

Employee Detail Custom Field

Department

Back to Employee Detail

Help for this Page

Custom Field Definition Detail

Edit Get Field Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Department	Object Name	Employee Detail
Field Name	Department	Date Type	Lookup
API Name	Department__c		
Description			
Help Text			
Date Owner			
Field Usage			
Date Security Level			
Compliance Categorization			
Created By	GAUTHRI SUBRAMAN	Created On	17/10/2021 11:56 am
Modified By	GAUTHRI SUBRAMAN	Modified On	17/10/2021 11:56 am

Lookup Options

Related To	Related List Label	Child Relationship Name	Employee Details
Department	Employee Details		
Required			

smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01U5000003qN4/FieldsAndRelationships/00N50000058Cq/view

Search Setup

SetupHomeObject Manager

SETUP + OBJECT MANAGER

Employee Detail

Details

Fields & Relationships

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Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Employee Detail Custom Field

Employee Id

Back to Employee Detail

Custom Field Definition Detail

Field Information

Field Label	Employee Id	Object Name	Employee Detail
Field Name	Employee__ID	Data Type	Text
API Name	Employee_ID__f		
Description			
Help Text			
Data Owner			
Field Usage			
Data Security Level			
Compliance Categorization			
Created By	QAYATHRI SUBRAMANIAM 11/10/2023 11:52 am	Modified By	QAYATHRI SUBRAMANIAM 11/10/2023 11:52 am

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>

Field Security

2)Creation of Expense:

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Click the "Gear" icon and select "Setup" to access the Salesforce Setup menu.

Step 3: In Setup, find "Objects" and select "Object Manager."

Step 4: Click the "Create" button to create a new custom object.

Step 5: Object Settings

Label: Enter "Expense."

Plural Label: Enter "Expenses."

Step 6: Choose to auto-number records or manually specify the record name as "Expense Name."

Step 7: Select "Text" as the data type for the record name.

Step 8: Ensure "Deployed" is selected for deployment status.

Select "Allow Search" for search status.

Step 9: In the "Optional Features" section, check "Allow Reports" and "Track Field History."

Step 10: Click "Save" to create the "Expense" object.

Customize the object by adding fields to capture relevant expense information, such

expense type, amount, date, and a lookup field to associate expenses with a specific

travel request.

Configure page layouts, security settings, and sharing rules as needed.

smartbridge-1a-dce-ed:develop.lightning.force.com/lightning/setup/ObjectManager/0110j0000003qNu/edit?address=%2F0110j0000003qNu%2Fedit%3F... Search Setup

Setup Home Object Manager Expense

Expense

Help for this Page

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural names 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 Expense Example: Account

Plural Label Expenses Example: Accounts

Starts with vowel sound ☐

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

Object Name Expense Example: Account

Description

Context-Sensitive Help Setting [Open the standard Salesforce.com Help & Training window](#)
[Open a window using a Visualforce page](#)

smartbridge-1a-dce-ed:develop.lightning.force.com/lightning/setup/ObjectManager/0110j0000003qNu/FieldsAndRelationships/00N0j000000316/edit Search Setup

Setup Home Object Manager Expense

Expense

Help for this Page

Custom Field Definition Edit Save Cancel

Field Information Required Information

Field Label Total Item

Field Name Total_Item

Description

Help Text

Field Owner User

Field Usage -None-

Field Security Level -None-

Compliance Categorization

Available
PI
HIPAA
GDPR

Chosen

smartbridge-14-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0103000003qNuFieldsAndRelationships/00N3000003Cyl/view

Search Setup

Setup Home Object Manager

Expense

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Expense Custom Field

Total Item

Back to Expenses

Custom Field Definition Detail

Field Information

Field Label	Total Item	Object Name	Expense
Field Name	Total_Item		
API Name	Total_Item__c		
Description			
Help Text			
Field Owner			
Field Usage			
Date Sensitivity Level			
Compliance Categorization			
Created By	SAVATHRI SUBRAMAN	Modified By	SAVATHRI SUBRAMAN
	12/10/2023, 8:04 pm		12/10/2023, 8:04 pm

Roll-Up Summary Options

Roll-Up Summary	Summary Type	COUNT
Summaryed Object		
Filter Criteria		

smartbridge-14-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0103000003qNuFieldsAndRelationships/00N3000003Cyl/edit

Search Setup

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Buttons, Links, and Actions

Compact Layouts

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Object Limits

Record Types

Related Lookup Filters

Search Layouts

Edit Expense Custom Field

Travel Approval

Have feedback on this page? Comment on IdeaExchange Help for this Page

Custom Field Definition Edit

Field Information

Field Label

Field Name

Description

Help Text

Field Owner

Field Usage

Date Sensitivity Level

Compliance Categorization

Available

PI

HIPAA

GDPR

Chosen

smartbridge-1a-dex-ed:develop lightning.force.com/lightning/setup/ObjectManager/011j000003ghu7FieduAnllwawwemznpuGONVp000005Kcpl/new

Search Setup

SetupHomeObject Manager

Expense

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LinksRecord TypesRelated Lookup FieldsSearch Layouts

Expense Custom Field

Travel Approval

Back to Expense

Details

Custom Field Definition Detail

Field Information

Field Label	Travel Approval	Object Name	Expense
Field Name	Travel_Approval	Field Type	Master-Detail
API Name	Travel_Approval__c		
Description			
Help Text			
Field Owner			
Field Usage			
Field Accessibility Level			
Compliance Categorization			
Created By	Govindhu Subramani	Created On	17/10/2023, 12:26 pm
Modified By	Govindhu Subramani	Modified On	17/10/2023, 12:26 pm

Master-Detail Options

Related To	Expense	Child Relationship Name	Expenses
Related List Label	Expenses		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		

3)Creation of Expense Item:

Step 1:Log in to Salesforce with administrative privileges.

Step 2:Click the "Gear" icon and select "Setup" to access the Salesforce Setup menu.

Step 3:In Setup, find "Objects" and select "Object Manager."

Step 4:Click the "Create" button to create a new custom object.

Step 5: Object Settings

Label: Enter "Expense Item."

Plural Label: Enter "Expense Items."

Step 6:Choose to auto-number records or manually specify the record name as "Item Name" or "Expense Item Name."

Step 7: Select "Text" as the data type for the record name.

Step 8:Ensure "Deployed" is selected for deployment status.

Select "Allow Search" for search status.

Step 9: In the "Optional Features" section, check "Allow Reports" and "Track Field History."

Step 10:Click "Save" to create the "Expense Item" object.

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01150000003qNm/FieldsAndRelationships/00N5000000Cw/edit

Setup Home Object Manager

Expense Items

Expense Items Custom Field

Expense

Have feedback on setup? Report a problem or help change Help for this Page

Custom Field Definition Edit

Field Information

Field Label	Expense	Data Type	Master/Detail
Field Name	Expense		
Description			
Help Text			
Data Owner	User		
Field Scope	-None-		
Field Security Level	-None-		
Compliance Categorization	Available PI HIPAA (None)	Chosen	

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01150000003qNm/FieldsAndRelationships/00N5000000Cw/view

Setup Home Object Manager

Expense Items

Expense Items Custom Field

Expense

Back to Expense Items

Validation Rules 0

Custom Field Definition Detail

Field Information

Field Label	Expense	Object Name	Expense Items		
Field Name	Expense	Data Type	Master/Detail		
API Name	Expense__c				
Description					
Help Text					
Data Owner					
Field Scope					
Field Security Level					
Compliance Categorization					
Created By	GAJATHRI SUBRAMAN	17/10/2023, 12:02 pm	Modified By	GAJATHRI SUBRAMAN	17/10/2023, 12:02 pm

Master-Detail Options

Related To	Expense	Child Relationship Name	Expense_Items
Related List Label	Expense Items		
Sharing Setting	Read/Write: Allow users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		

smartbridge-14-dev-ed.develop.lightning.force.com/lightning/setup/CustomFieldManager/0115j0000003qhe7FieldsAndRelationships/00H50000000C6x1/edit

Setup Home Object Manager

Expense Items

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

Expense Items Custom Field

Expense Type

Custom Field Definition Edit

Change Field Type Promote to Global Scope Set Save Cancel

Field Information

Field Label Expense Type Data Type Picked

Field Name Expense_Type

Description

Help Text

Date Owner User

Field Usage -None-

Date Sensitivity Level -None-

Compliance Categorization

Available: PB, HIPAA, GDPR, BC

Chosen:

smartbridge-14-dev-ed.develop.lightning.force.com/lightning/setup/CustomFieldManager/0115j0000003qhe7FieldsAndRelationships/00H50000000C6x1/view

Setup Home Object Manager

Expense Items

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

Expense Items Custom Field

Expense Type

Back to Expense Items

Version: 1.0

Custom Field Definition Detail

Edit Set Field Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Expense Type	Object Name	Expense Items
Field Name	Expense_Type	Data Type	Picked
API Name	Expense_Type__c		
Description			
Help Text			
Date Owner			
Field Usage			
Date Sensitivity Level			
Compliance Categorization			
Created By	gavathri.surabamoji	17/10/2023, 12:07 pm	
Modified By	gavathri.surabamoji	17/10/2023, 12:07 pm	

General Options

Required

Default Value

4)Creation of Travel Approval:

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Click the "Gear" icon and select "Setup" to access the Salesforce Setup menu.

Step 3: Decide whether to use an existing standard object or create a custom object for "Travel Approvals."

If creating a custom object, follow the previous steps mentioned for creating a custom object.

Step 4: In the object's details, go to the "Fields & Relationships" section and click "New Custom Field."

Define the custom field for "Travel Approval" with an appropriate data type.

Step 5: Name the field as "Travel Approval."

Configure any additional field attributes such as default value or help text.

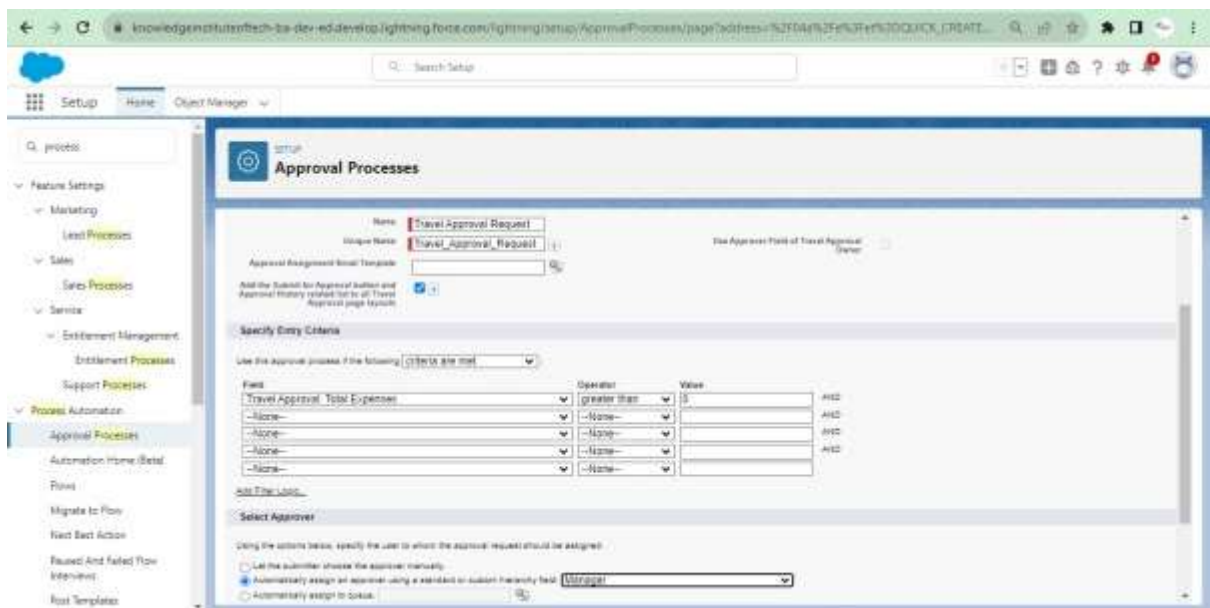
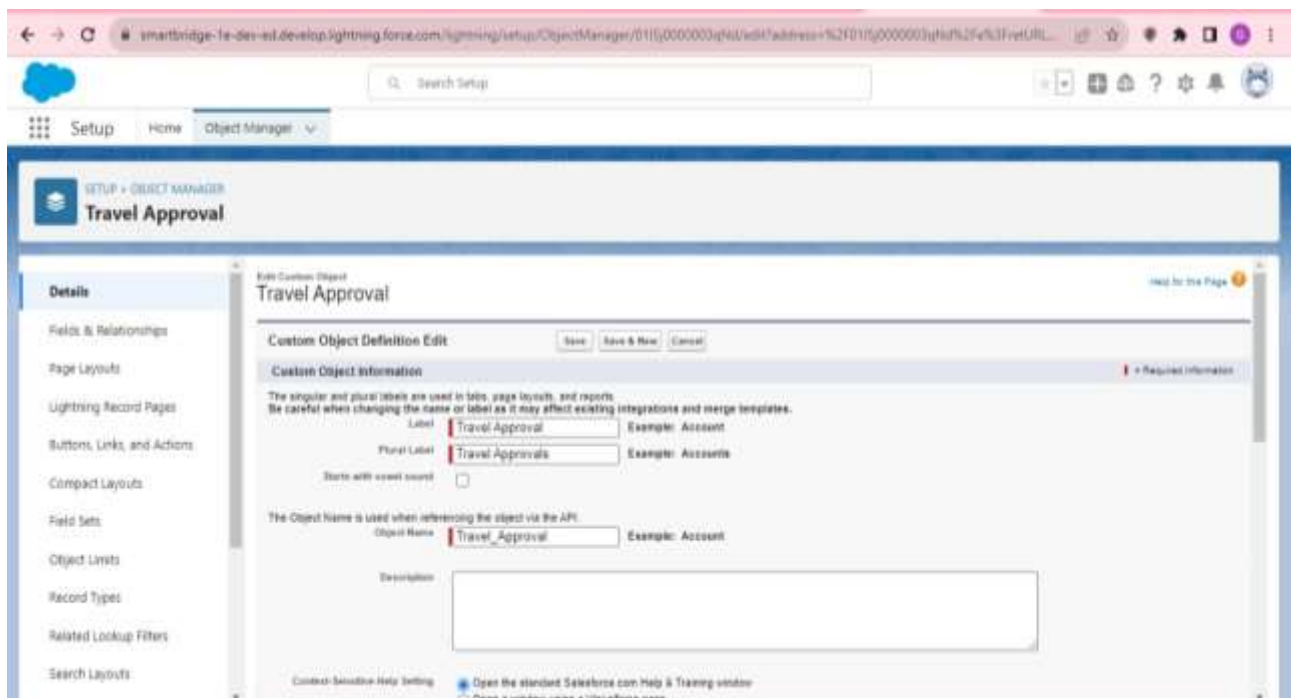
Step 6: Define field-level security settings to control who can view and edit the "Travel Approval" field.

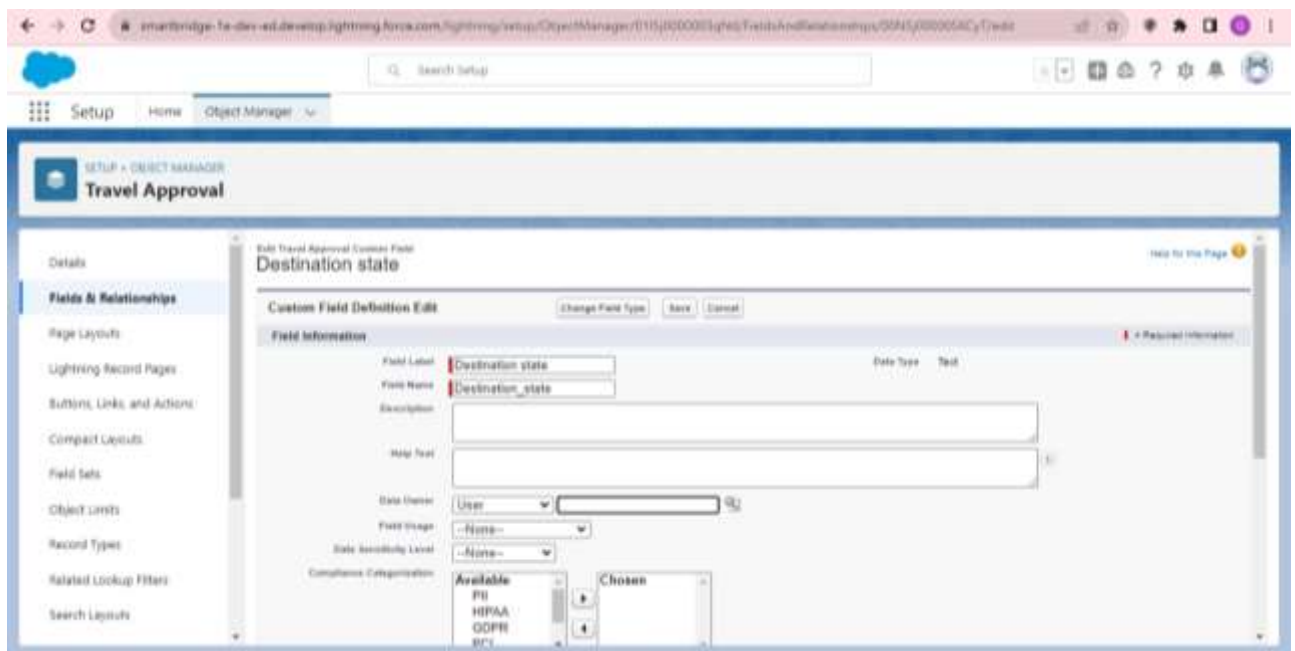
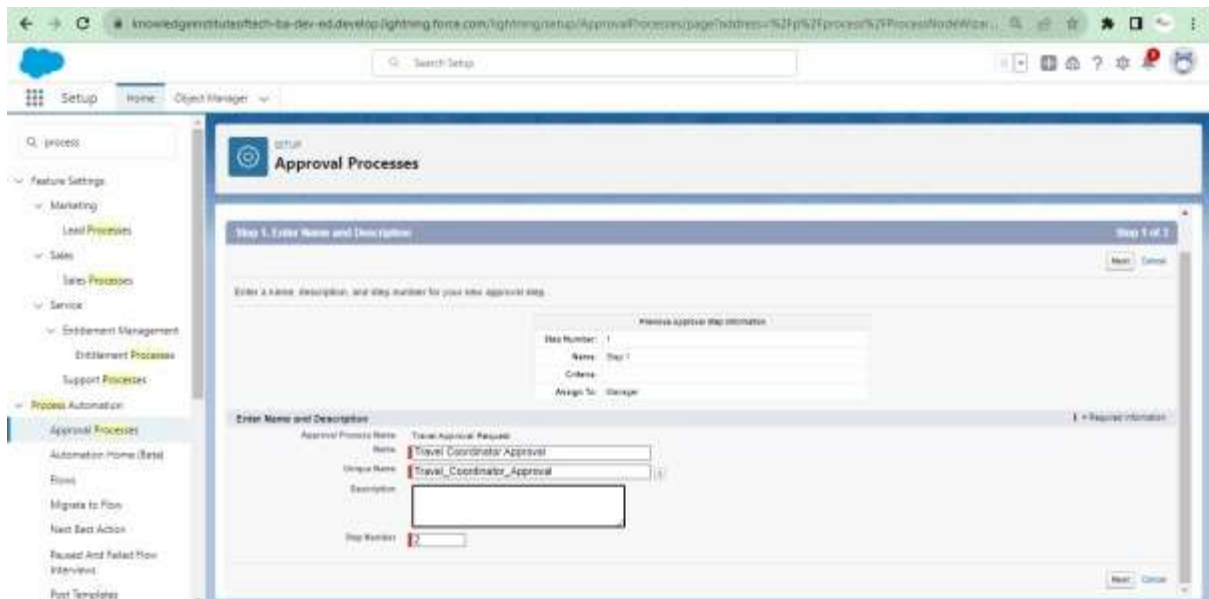
Step 7: Edit the page layout for the object and add the "Travel Approval" field to the layout to make it visible when viewing or editing records.

Step 8: When a travel approval is granted, update the "Travel Approval" field on the corresponding record to indicate the approval status or approval date.

Step 9: Automate Actions (Optional).

Step 10: Thoroughly test the "Travel Approval" process to ensure it meets your requirements. Once tested, deploy the process for use by all users.





smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115000003ghw/FieldsAndRelationships/00N5000005KCp7/new

Search Setup

Setup Home 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

Travel Approval Custom Field

Destination state

Back to Travel Approval

Custom Fields (2)

Custom Field Definition Detail

Edit Get Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Destination state	Object Name	TravelApproval
Field Name	Destination__state	Data Type	Text
API Name	Destination__state__c		
Description			
Help Text			
Date Owner			
Field Usage			
Date Security Level			
Compliance Categorization			
Created By	QANATHRI SUBRAMANIAM 11/10/2023, 12:50 pm	Modified By	QANATHRI SUBRAMANIAM 11/10/2023, 12:50 pm

General Options

Required ☐

Unique ☐

Check Syntax ☐

smartbridge-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115000003ghw/FieldsAndRelationships/00N5000005KCp7/edit

Search Setup

Setup Home 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

Edit Travel Approval Custom Field

Purpose of trip

Help for this Page

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label Purpose of trip Data Type Text

Field Name Purpose_of_trip

Description

Help Text

Date Owner User

Field Usage -None-

Date Security Level -None-

Compliance Categorization

Available: PI, HIPAA, GDPR, BCI

Chosen:

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjMgr/011000003qH4FieldsAndRelationships/00N5000005ACy0/view

Search Setup

Setup Home Object Manager

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

Travel Approval Custom Field
Purpose of trip
Back to Travel Approval

011000003qH4

Custom Field Definition Detail

Field Information

Field Label	Purpose of trip	Object Name	Travel Approval
Field Name	Purpose_of_trip	Data Type	Text
API Name	Purpose_of_trip__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	GAJATHRI SUBRAMAN	Modified By	GAJATHRI SUBRAMAN
	17/10/2023, 12:31 pm		17/10/2023, 12:31 pm

General Options

Required ☐

Unlocked ☐

Copy Settings

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/setup/ObjMgr/011000003qH4FieldsAndRelationships/00N5000005ACy0/view

Search Setup

Setup Home Object Manager

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

Edit Travel Approval Custom Field
Trip start date
Help for this Page

Custom Field Definition Edit

Field Information

Field Label

Field Name

Description

Help Text

Data Owner

Field Usage

Data Sensitivity Level

Compliance Categorization

Available: PB, HIPAA, GDPR, PCI

Chosen:

smartbridge-1a-dce-ed:develop lightning.force.com/lightning/setup/ObjectManager/0110000003464/FieldsAndRelationships/00H1000000AC?c=edit

Search Setup

Setup Home Object Manager

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

Travel Approval Custom Field

Trip start date

Back to Travel Approval

Validation Rules (2)

Custom Field Definition Detail

Edit Get Field Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Trip start date	Object Name	TravelApproval
Field Name	Trip_start_date	Date Type	Date
API Name	Trip_start_date__c		
Description			
Help Text			
Date Owner			
Field Usage			
Date Security Level			
Compliance Categorization			
Created By	GAJATHIR SUBRAMANIAM	Created On	11/10/2023, 12:32 pm
Modified By	GAJATHIR SUBRAMANIAM	Modified On	11/10/2023, 12:32 pm

General Options

Required ☐

Default Value

smartbridge-1a-dce-ed:develop lightning.force.com/lightning/setup/ObjectManager/0110000003464/FieldsAndRelationships/00H1000000AC?c=edit

Search Setup

Setup Home Object Manager

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

Edit Travel Approval Custom Field

Trip End date

Change Field Type Save Cancel

Field Information

Field Label Trip End date Date Type Date

Field Name Trip_End_date

Description

Help Text

Date Owner User

Field Usage --None--

Date Security Level --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, OPI

Chosen:

smartbridge-14-dev-ed.develop.lightning.force.com/lightning/setup/ObjMgr/FieldsAndRelationships/00N5200000KCs?view

Search Setup

Setup Home Object Manager

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

Travel Approval Custom Field

Trip End date

Back to Travel Approval

Update Status (2)

Custom Field Definition Detail

Edit Get Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Trip End date	Object Name	TravelApproval
Field Name	Trip_End_date	Date Type	Date
API Name	Trip_End_date__c		
Description			
Help Text			
Date Owner			
Field Usage			
Date Security Level			
Compliance Categorization			
Created By	GAOATHIR SUBRAMAN	Created On	11/16/2023, 12:32 pm
Modified By	GAOATHIR SUBRAMAN	Modified On	11/16/2023, 12:32 pm

General Options

Required ☐

Default Value

smartbridge-14-dev-ed.develop.lightning.force.com/lightning/setup/ObjMgr/FieldsAndRelationships/00N5200000KCs?view

Search Setup

Setup Home Object Manager

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

Edit Travel Approval Custom Field

Status

Custom Field Definition Edit

Change Field Type Promote to Global Value Set Save Cancel

Field Information

Field Label Date Type **Picklist**

Field Name

Description

Help Text

Date Owner

Field Usage

Date Security Level

Compliance Categorization

Available: FI, HIPAA, GDPR, PCI

Chosen:

Tabs:

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

1.Standard Object Tabs: Standard object tabs display data related to standard objects.

2.Custom Object Tabs: Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.

3.Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tab.

4.Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

1)Creation of Employee Details

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Access Setup from the "Gear" icon.

Step 3: In Setup, find "User Interface" and select "Tabs."

Step 4: Click "New Custom Object Tab."

Step 5: Choose the "Employee Detail" object and label it as "Employee Details."

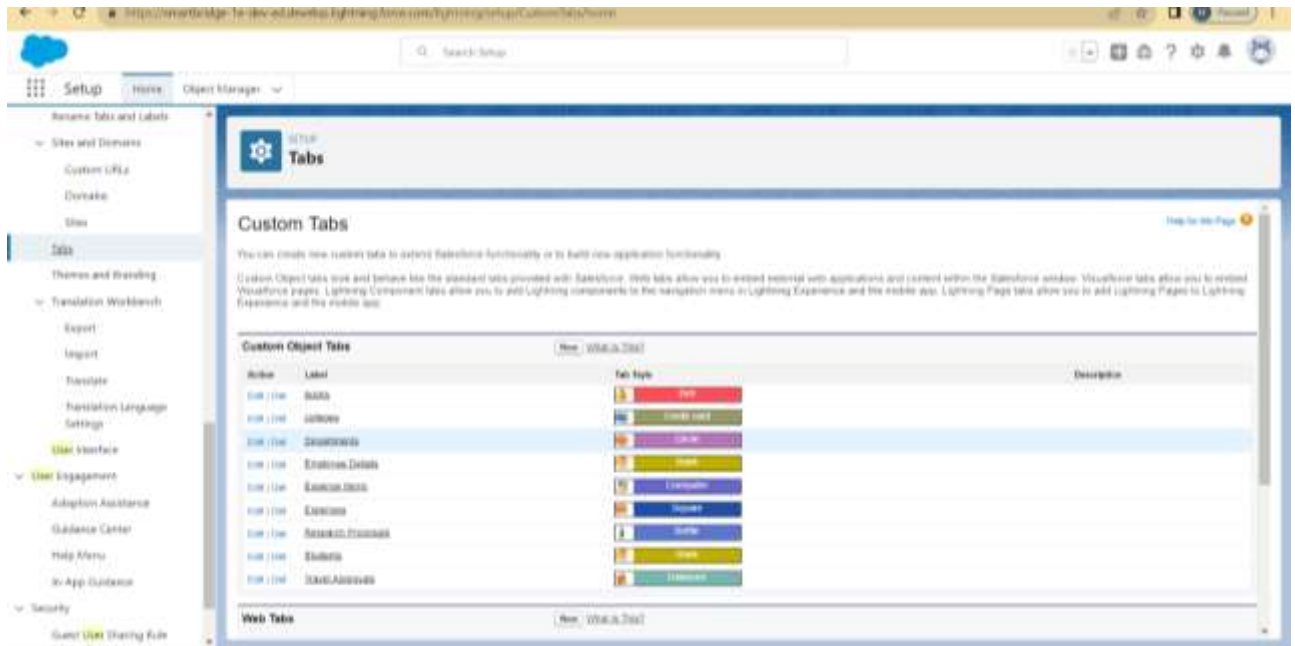
Step 6: Configure tab appearance, accessibility, and styling.

Step 7: Save the tab.

Step 8: Arrange the tab's order in "App Manager."

Step 9: Assign the tab to relevant user profiles in the "Profiles" section of Setup.

Step 10: Test the tab and deploy it for user access.



2) Creation of Expenses Tab

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Access Setup from the "Gear" icon.

Step 3: In Setup, go to "Objects and Fields" and select "Object Manager."

Step 4: Create a custom object for "Expenses" if it doesn't already exist. Ensure it has the necessary fields to capture expense information.

Step 5: Go to "User Interface" in Setup and select "Tabs."

Step 6: Click "New Custom Object Tab."

Step 7: Choose the custom object for "Expenses."

Step 8: Label the tab as "Expenses" and configure its style and color.

Step 9: Save the tab.

Step 10: Arrange the tab's order in your app and assign it to relevant user profiles.



3) Creation of Expense Item Tab

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Access Setup from the "Gear" icon.

Step 3: In Setup, go to "Objects and Fields" and select "Object Manager."

Step 4: Create a custom object for "Expense Items" if it doesn't already exist. Ensure it has the necessary fields to capture individual expense item details.

Step 5: Go to "User Interface" in Setup and select "Tabs."

Step 6: Click "New Custom Object Tab."

Step 7: Choose the custom object for "Expense Items."

Step 8: Label the tab as "Expense Items" and configure its style and color.

Step 9: Save the tab.

Step 10: Arrange the tab's order in your app and assign it to relevant user profiles.

The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar contains the navigation menu with 'Setup' selected. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title is a brief explanation of Custom Object tabs. The 'Custom Object Tabs' section contains a table with the following data:

Active	Label	Tab Style	Description
Yes / On	SOCS	Icon	
Yes / On	ADDRESS	Icon	
Yes / On	CreditCard	Icon	
Yes / On	Customer Details	Icon	
Yes / On	Customer Details	Icon	
Yes / On	Customer Details	Icon	
Yes / On	Customer Details	Icon	
Yes / On	Customer Details	Icon	
Yes / On	Customer Details	Icon	
Yes / On	Customer Details	Icon	
Yes / On	Customer Details	Icon	

The 'CreditCard' tab is highlighted with a black arrow pointing to it. Below the table is a section for 'Web Tabs' with a 'New' button and a 'What's This?' link.

4)Creation of Travel Approval Tab

Step 1: Log in to Salesforce with administrative privileges.

Step 2: Access Setup from the "Gear" icon.

Step 3: In Setup, find "User Interface" and select "Tabs."

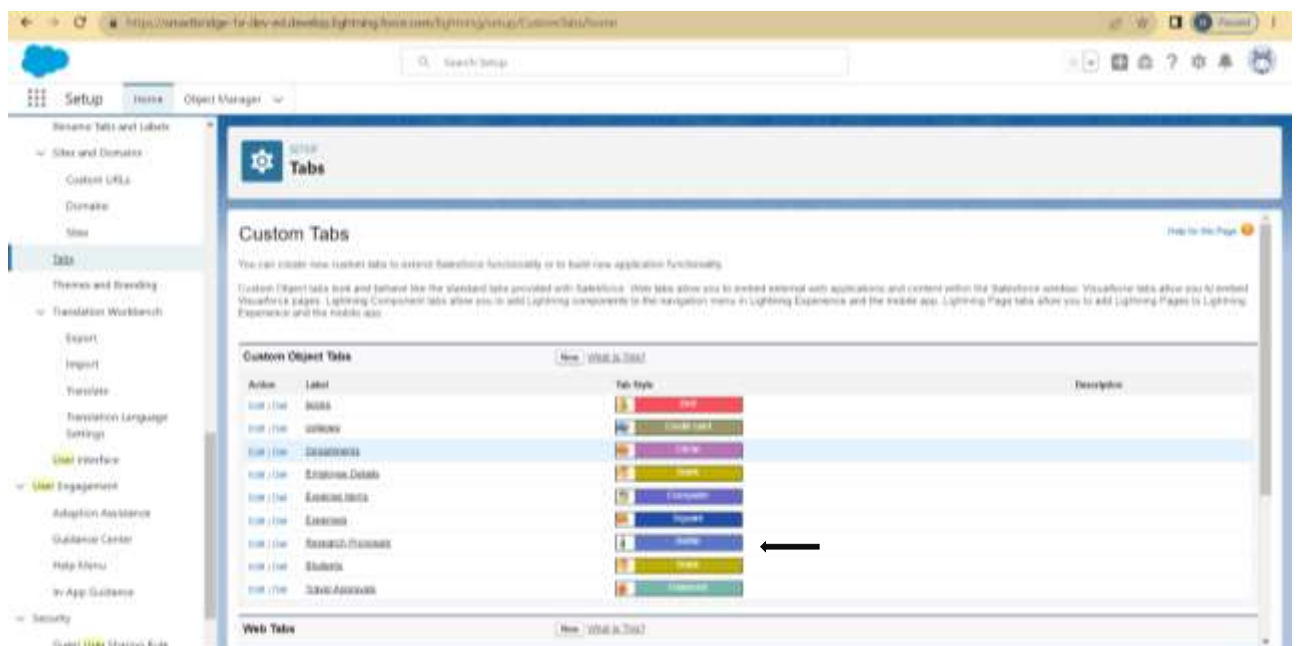
Step 4: Click on the "New Custom Object Tab" button.

Step 5: Choose the object where you track "Travel Approvals"

Step 6: Label the tab as "Travel Approvals" and configure its style and color.

Step 7: Save the tab.

Step 8: Arrange the tab's order in your app and assign it to relevant user profiles.



Lightning App:

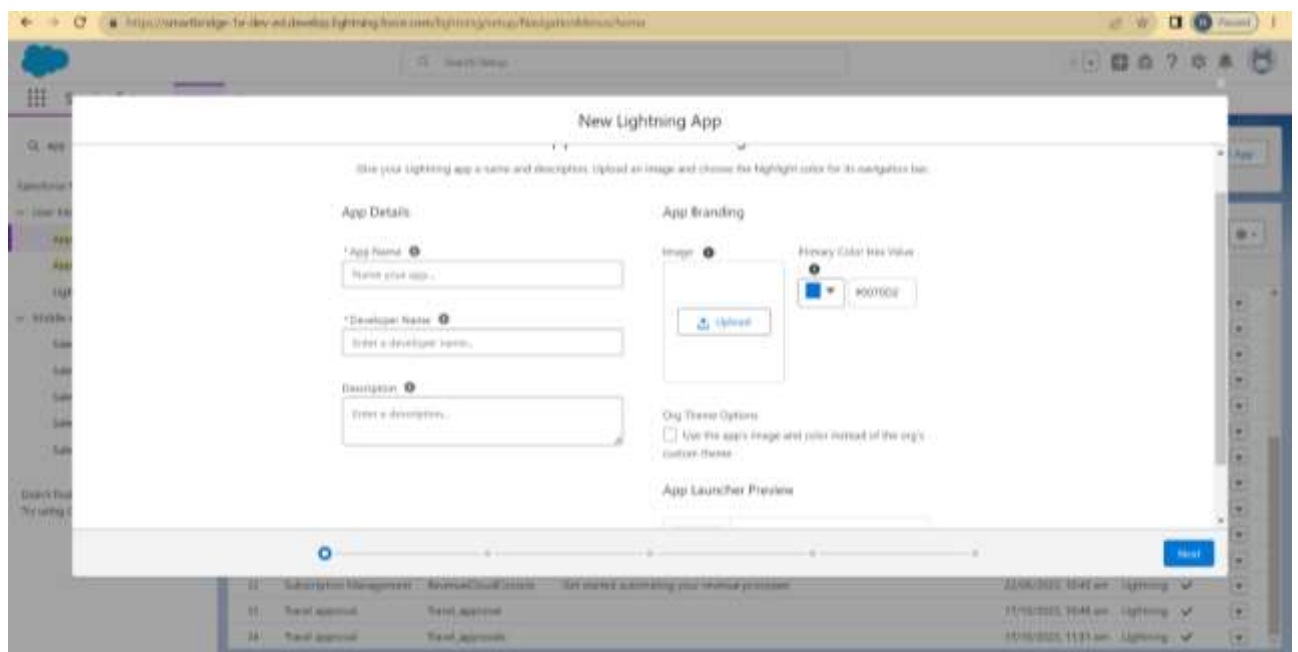
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

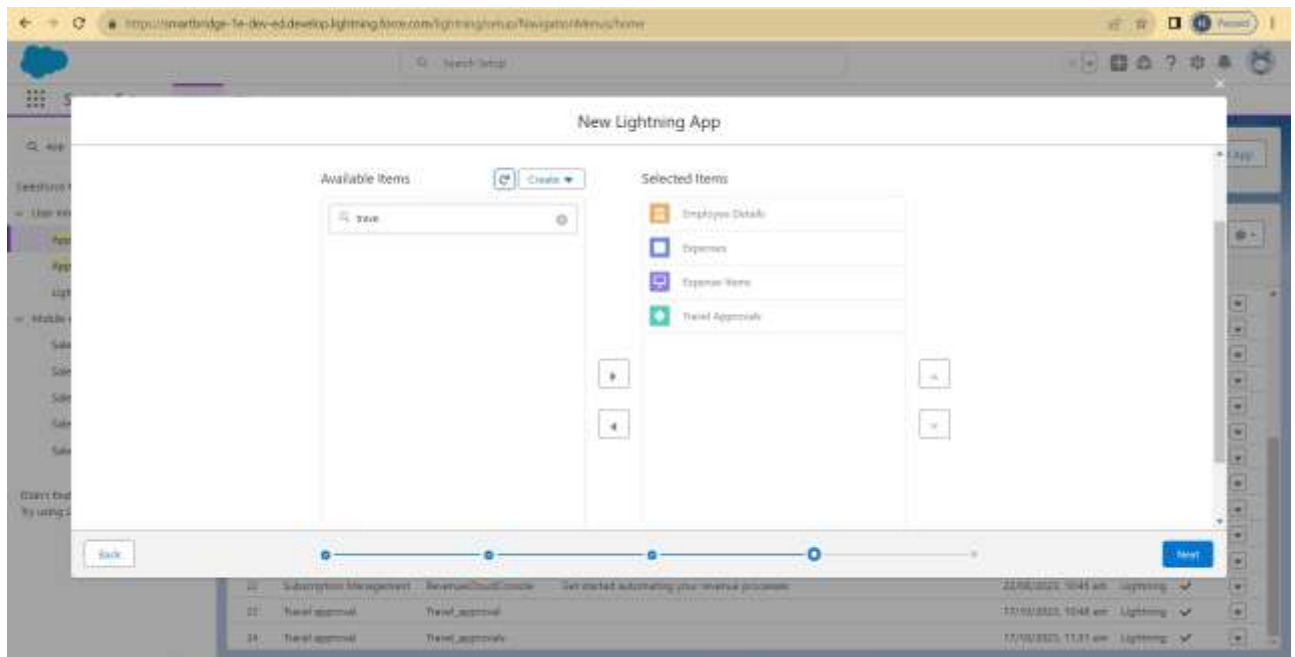
Standard apps: these apps come with every occurrence of Salesforce as default. Community, Call Centre, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.

Custom apps: these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

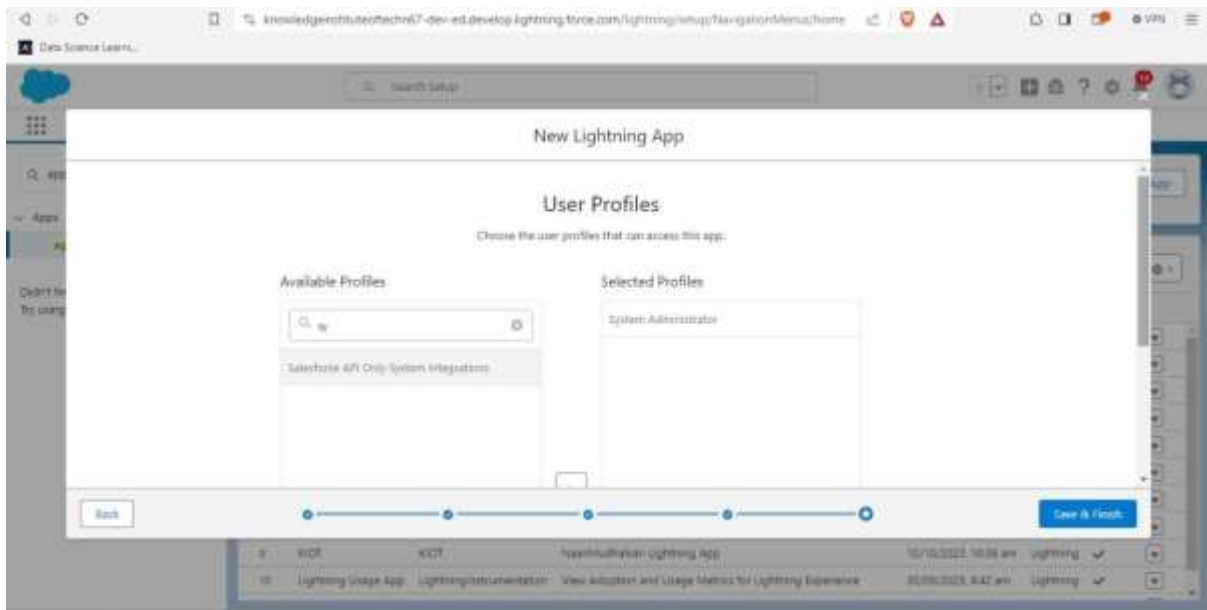
1. Click New Lightning App. Travel approval application as the App Name, then click Next



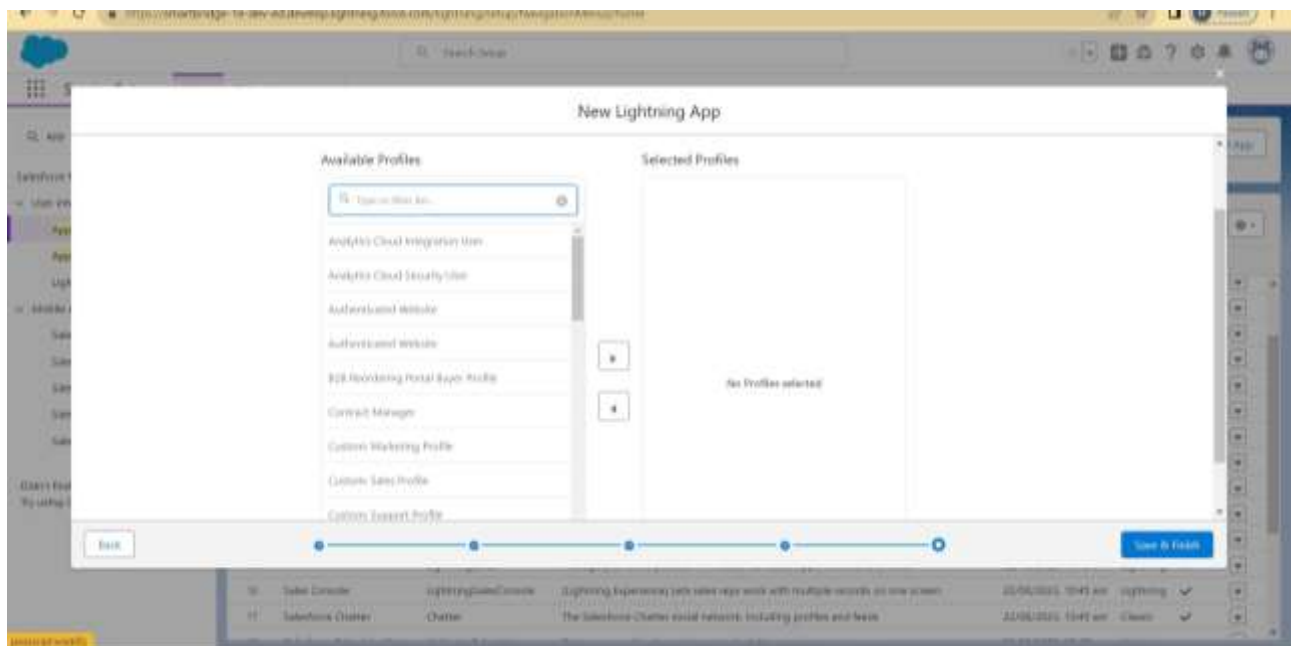
2. Under App Options, leave the default selections and click Next.
3. Under Utility Items, leave as is and click Next.
4. From Available Items, select Employee Details, Expense, Expense Items, Travel Approvals and Dashboards and move them to Selected Items. Click Next.



5. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



6. To verify your changes, click the App Launcher, type Job Application and select the Job Application app.



Fields and Relationship:

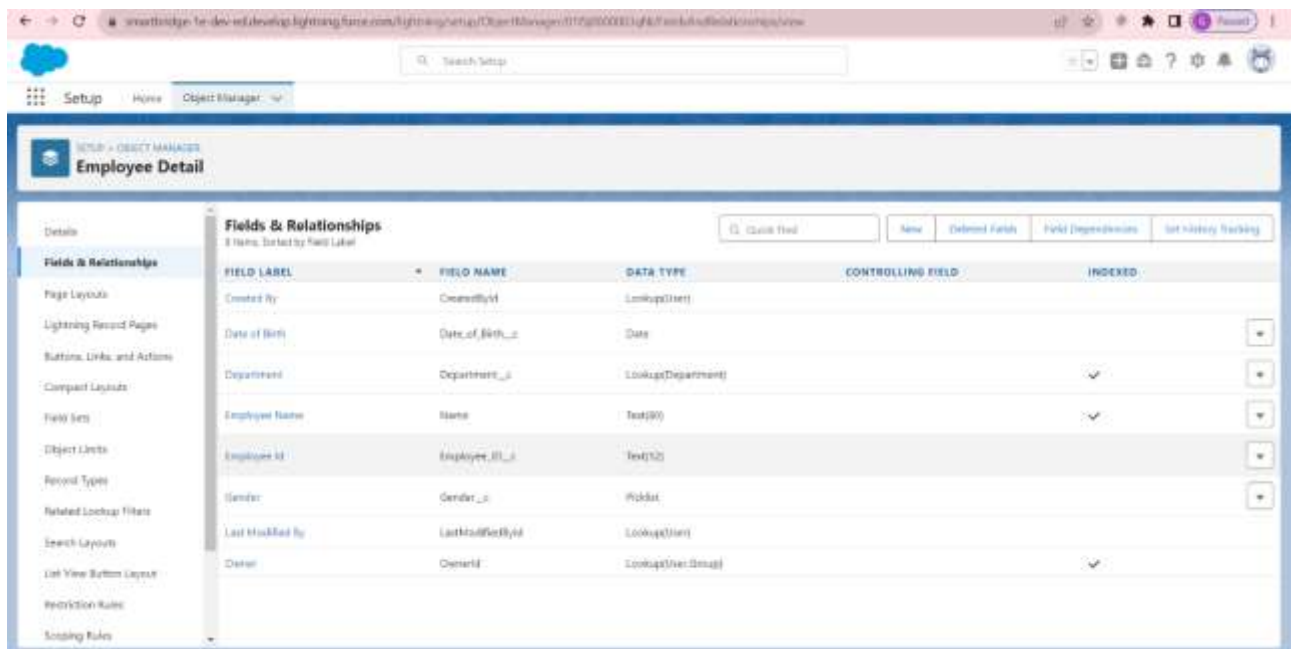
Fields in Salesforce represent what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

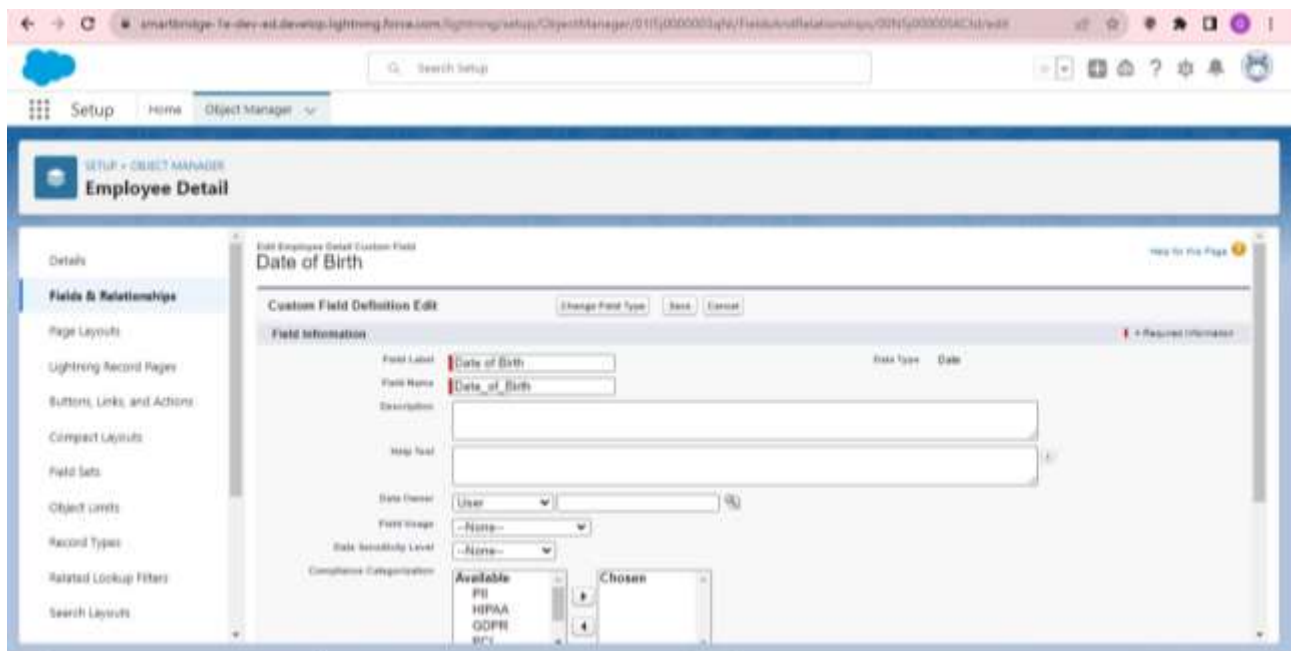
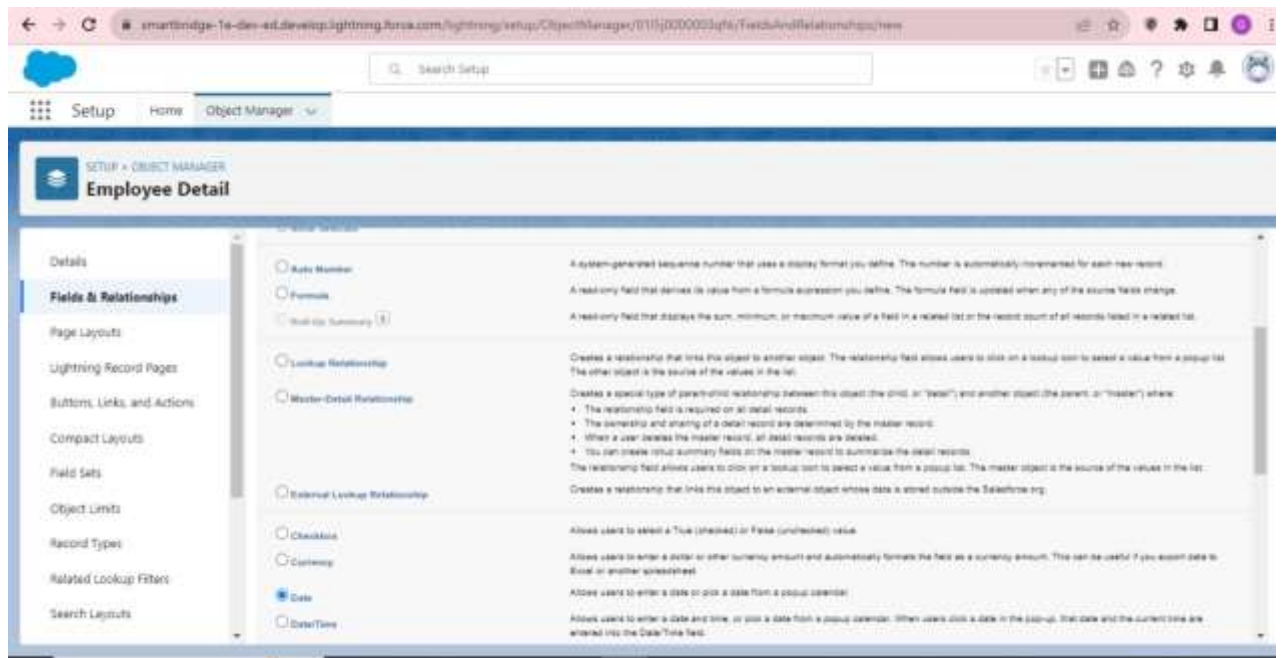
There are 2 types of fields in salesforce:

Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.

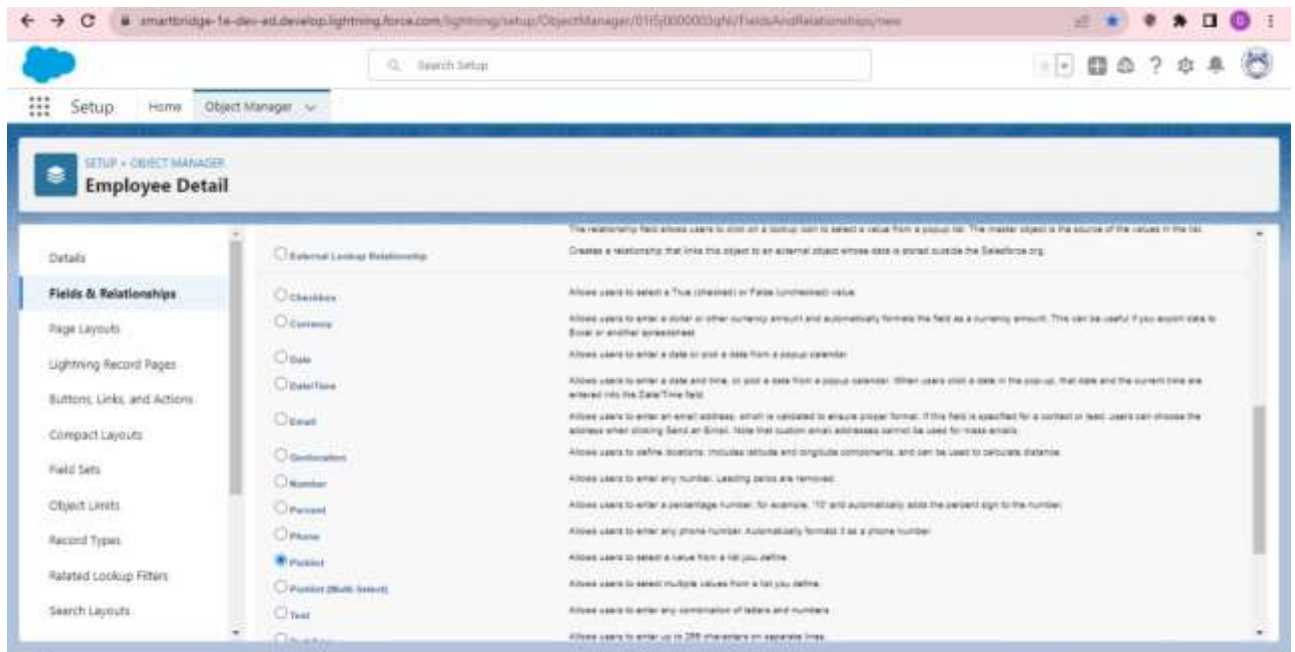
Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

1)Creation of Fields for Employee Details Objects

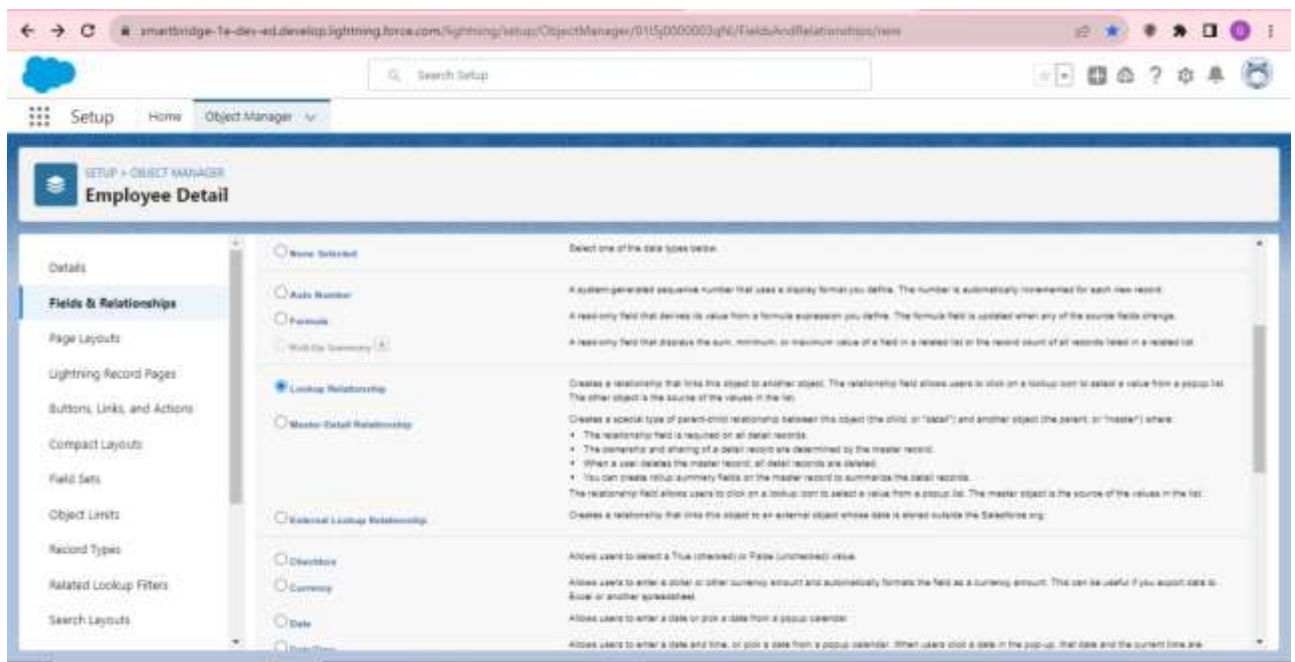




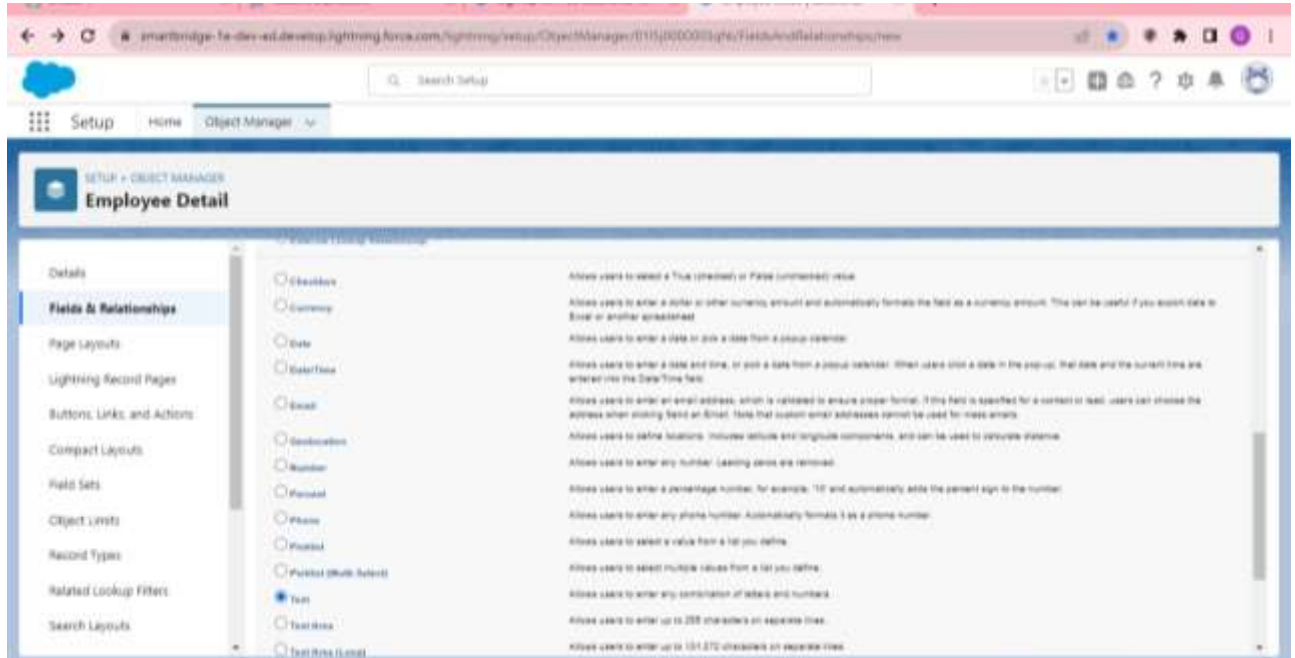
2) Picklist for Gender



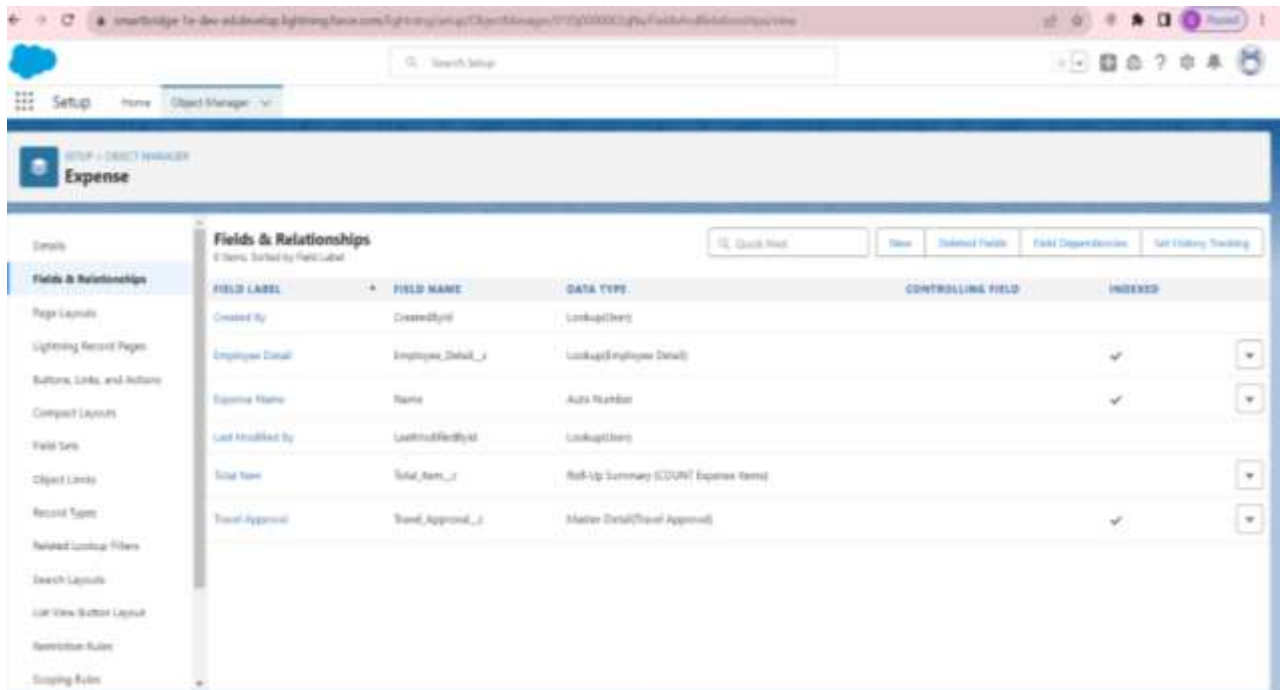
3) Lookup Relationship



4)Text



5)Creation of Fields for Expense



6) Rollup summary

The screenshot shows the Salesforce Setup page for creating a new custom field. The page is titled "New Custom Field" and is part of the "Expense" object manager. The left sidebar shows the "Fields & Relationships" section. The main content area is titled "Step 1: Choose the field type" and includes a "Next" button. The "Data Type" section lists several options: "More Selected", "Auto Number", "Formula", "Rollup Summary", "Lookup Relationship", and "Master-Detail Relationship". The "Rollup Summary" option is selected.

Expense
New Custom Field

Step 1: Choose the field type

Specify the type of information that the custom field will contain.

Data Type

☐ More Selected Select one of the data types below.

☐ Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☒ Rollup Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

7) Creation of Fields Expense Items

The screenshot shows the Salesforce Setup page for Expense Items. The page is titled "Expense Items" and is part of the "Fields & Relationships" section. The left sidebar shows the "Fields & Relationships" section. The main content area shows a table of fields and relationships for Expense Items. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The table lists several fields, including Created By, Expense, Expense Item Name, Expense Type, Last Modified By, and Travel Approval.

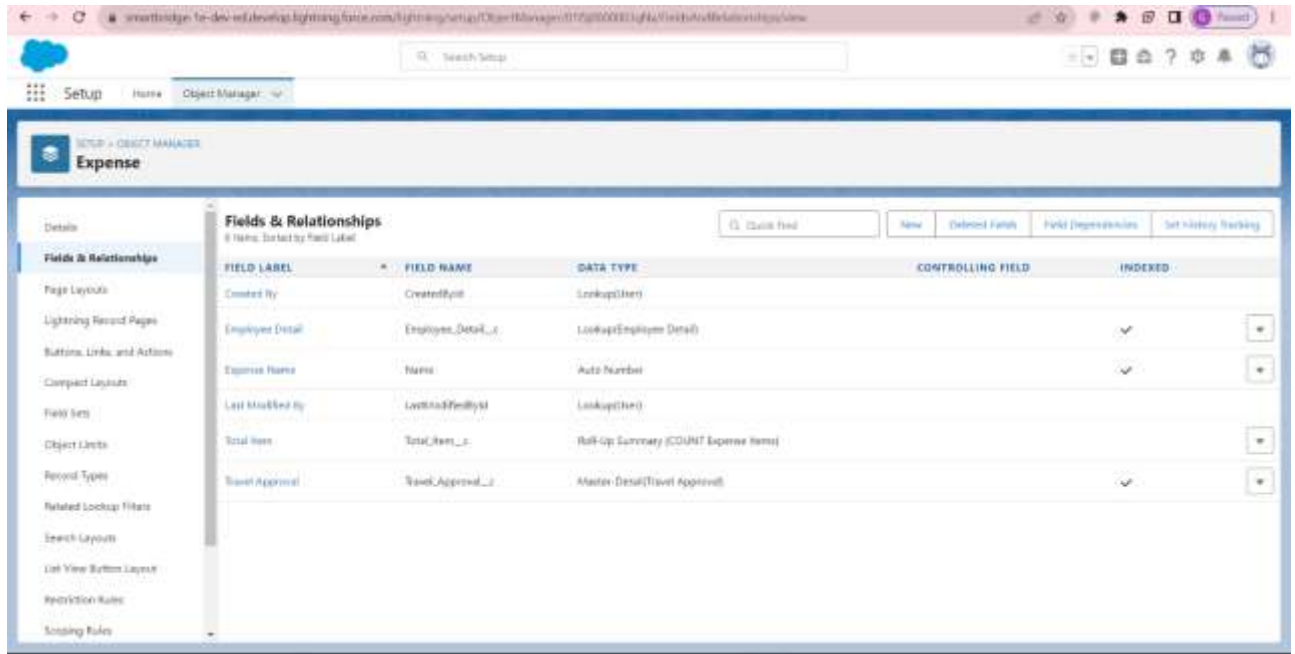
Expense Items

Fields & Relationships

8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Expense	Expense__c	Master-Detail(Expense)		✓
Expense Item Name	Name	Text(255)		✓
Expense Type	Expense_Type__c	Picklist		
Last Modified By	LastModifiedBy	Lookup(User)		
Travel Approval	Travel_Approval__c	Master-Detail(Travel Approval)		✓

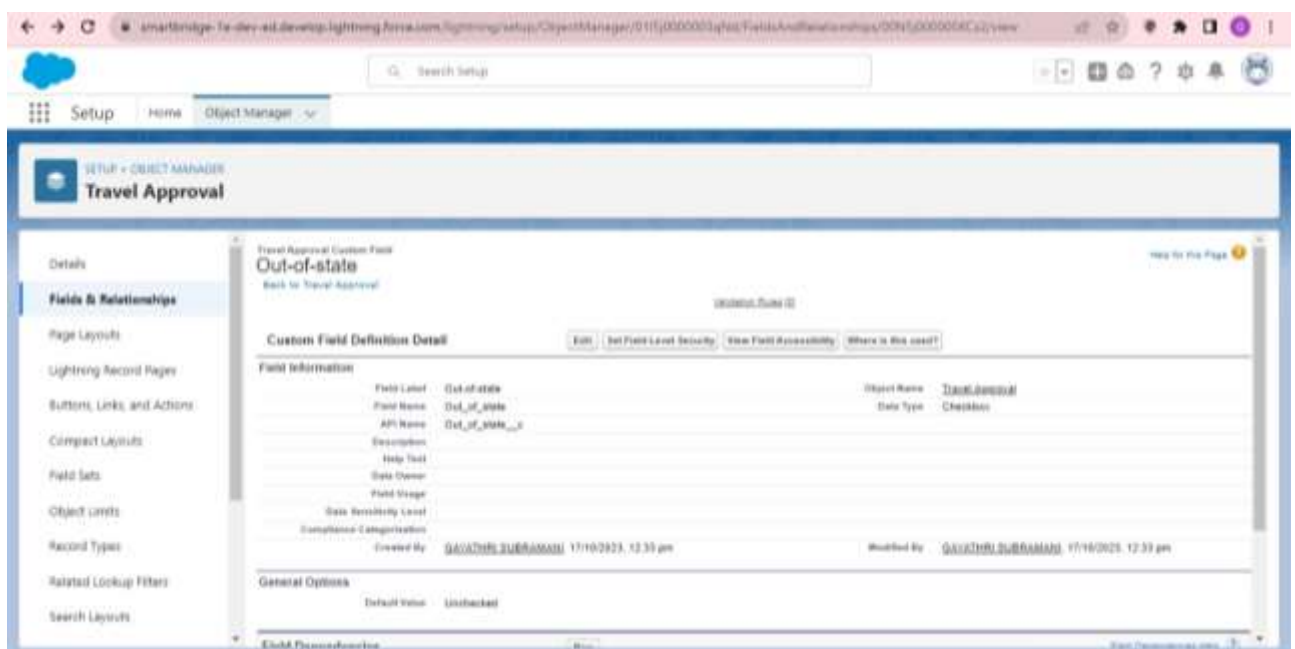
8) Creation of Fields Travel Approval



The screenshot shows the Salesforce Setup interface for the 'Expense' object. The 'Fields & Relationships' section is active, displaying a list of fields. The table below represents the data shown in the screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Employee Detail	Employee_Detail__c	Lookup(Employee Detail)		✓
Expense Name	Name	Auto Number		✓
Last Modified By	LastModifiedDate	Lookup(User)		
Total Item	TotalItem__c	Roll-Up Summary (COUNT Expense Items)		
Travel Approval	Travel_Approval__c	Master-Detail (Travel Approval)		✓

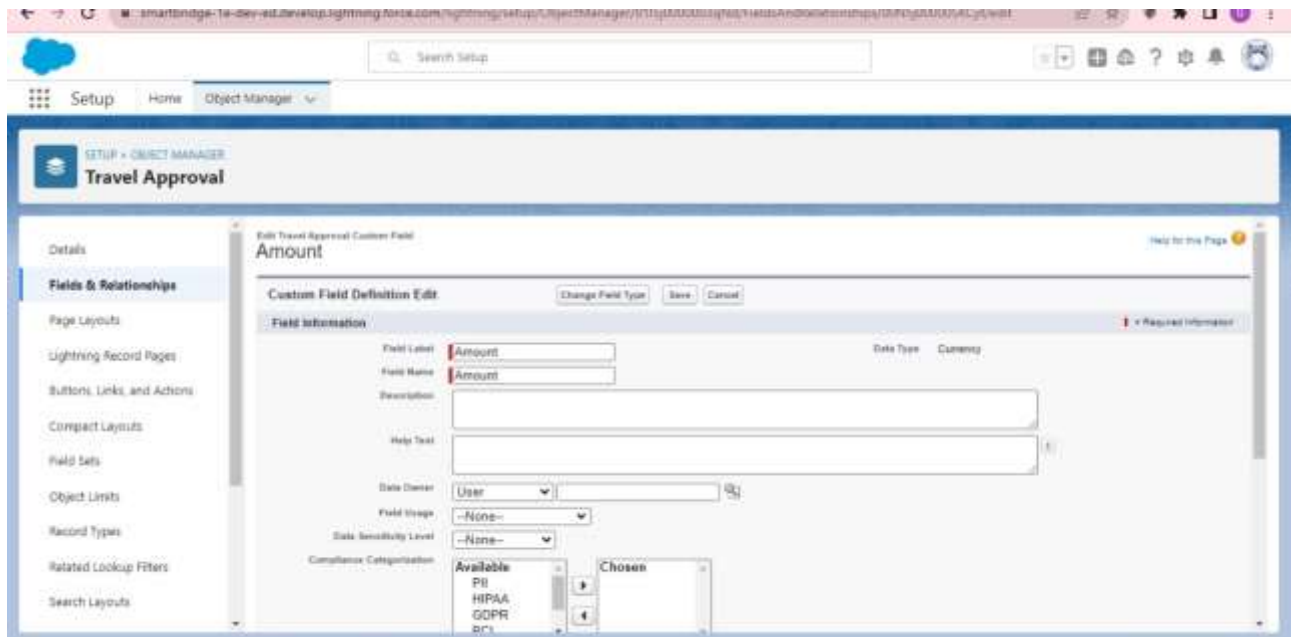
9) Fields for Out-of-State



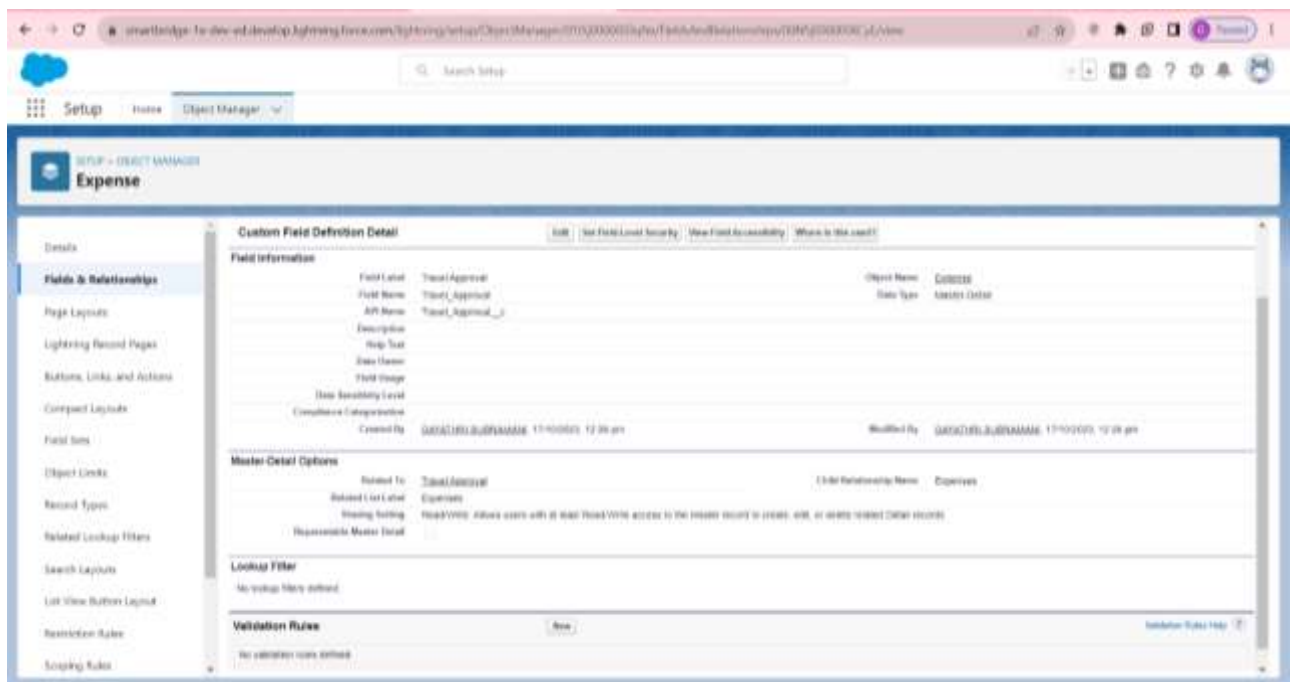
The screenshot shows the Salesforce Setup interface for the 'Travel Approval' custom field. The 'Out-of-state' field is being defined. The table below represents the data shown in the screenshot.

Field Information	Field Label	Field Name	API Name	Description	Help Text	Field Owner	Field Usage	Data Visibility Level	Compliance Categorization	Created By	Created Date	Modified By	Modified Date
	Out-of-state	Out_of_state	Out_of_state__c							GAJATHIRU SUBRAMANIAM	17/10/2023, 12:33 pm	GAJATHIRU SUBRAMANIAM	17/10/2023, 12:33 pm





11) Master-Detail for Expense



12) Picklist for state and country/Territory

The screenshot shows the Salesforce Setup interface for configuring State and Country/Territory Picklists. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled "State and Country/Territory Picklists" and includes a "Configure States, Countries, and Territories" section. Below this, there is a "Picklist Settings" section with a dropdown for "Default Country/Territory" set to "None". The "Countries/Territories (200)" section contains a table with columns for Action, Active, Visible, Country, Country/Territory Code, and Available States/Territories. The table lists various countries and territories, including Andorra, United Arab Emirates, Afghanistan, Anguilla and Barbuda, Anguilla, Albania, Armenia, and Anguilla.

Action	Active	Visible	Country	Country/Territory Code	Available States/Territories
ADD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Andorra	AD	...
ADD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	United Arab Emirates	AE	...
ADD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Afghanistan	AF	...
ADD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Anguilla and Barbuda	AG	...
ADD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Anguilla	AI	...
ADD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Albania	AL	...
ADD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Armenia	AM	...
ADD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Anguilla	AI	...

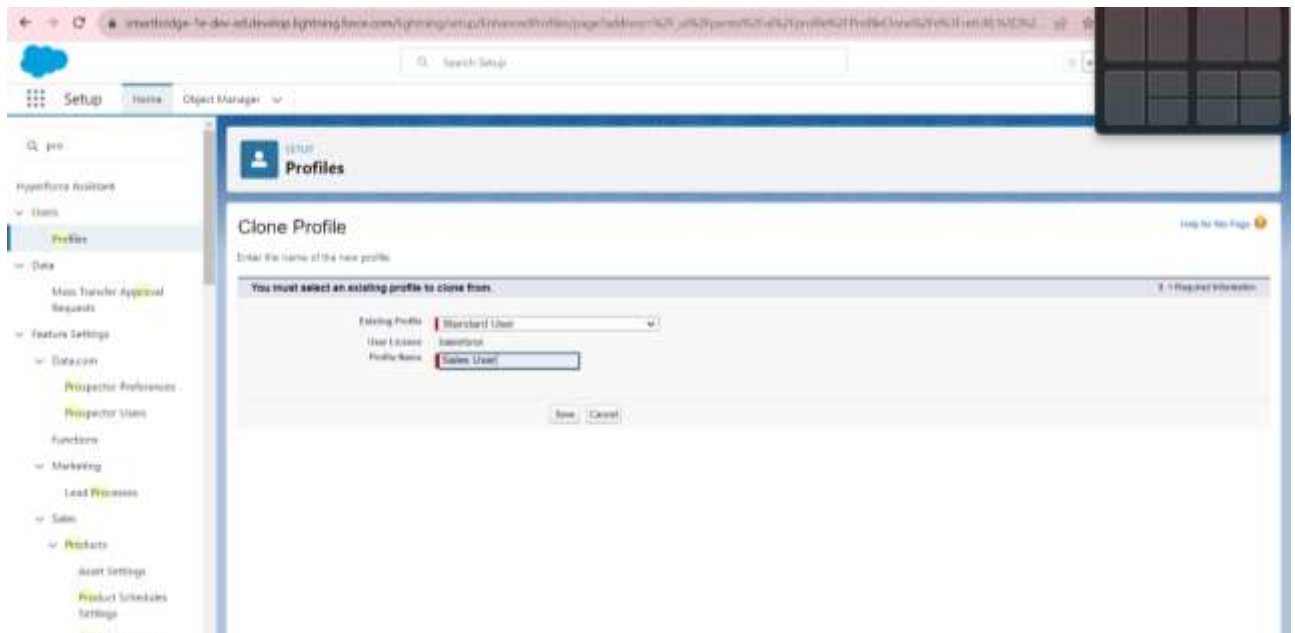
4.USERS & DATA SECURITY

Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. A profile can be assigned to many users, but user can be assigned single profile at a time.

1)Create A Custom Profile

- 1.From setup, enter profiles in Quick Find box
- 2.Select profiles (Standard user).
- 3.Click clone.
- 4.For Profile, enter Sales user.
- 5.Click save.



2)Create A Custom Profile-2

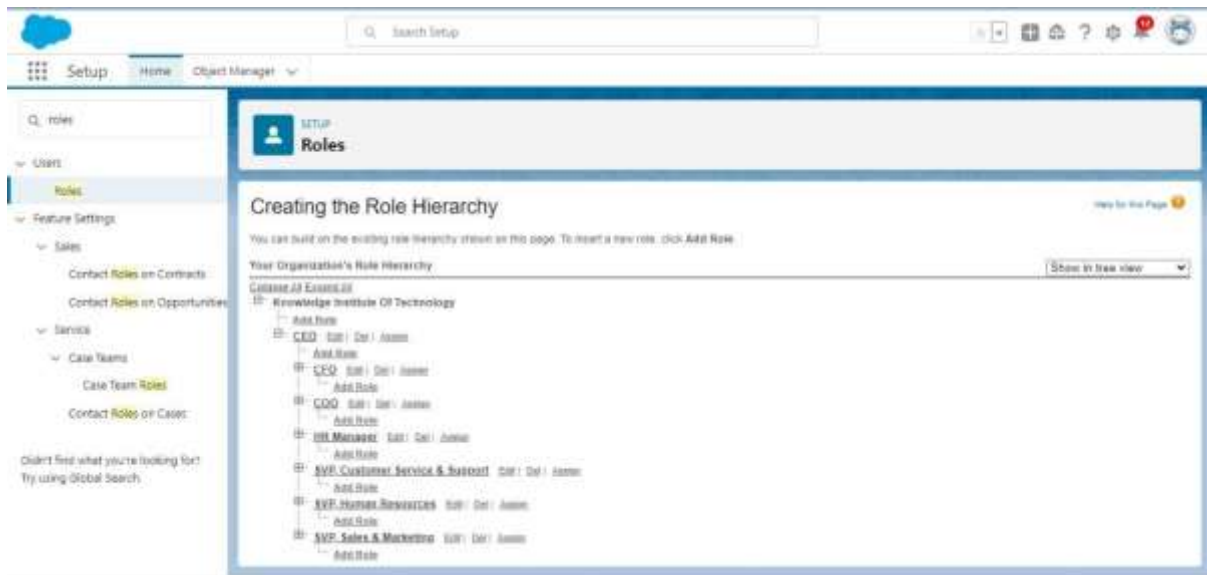
- 1.Create a profile with the profile name as “Sales Manager”.

-
- The screenshot displays the 'Profiles' management interface in SAP S/4HANA. The 'Sales Manager' profile is selected and its details are shown. The 'Name' field contains 'Sales Manager', and the 'Other Name' field contains 'Salesforce Platform'. The 'Description' field is currently empty. Below the profile details, the 'Custom App Settings' table is visible, listing various system settings and their status (Visible/Default).
- | Setting | Visible | Default |
|---|-------------------------------------|--------------------------|
| Analytics Mode (extended__Analytics) | <input type="checkbox"/> | <input type="checkbox"/> |
| App Location (extended__AppLocation) | <input type="checkbox"/> | <input type="checkbox"/> |
| Job Application Tracking (Job_Application_Tracking) | <input type="checkbox"/> | <input type="checkbox"/> |
| XOF (XOF) | <input type="checkbox"/> | <input type="checkbox"/> |
| Platform (Platform) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| WDC (Work) | <input type="checkbox"/> | <input type="checkbox"/> |

In Salesforce, roles are used to determine which users have access to certain data and functions within the system. They are also used to define the reporting hierarchy within an organization. Users with higher roles have greater access to data and more control over the system

1)Creation of Role

- 1.From the Quick find box search for the role and click on the roles option
- 2.select the set-up roles option
- 3.Below the CEO click on add role and enter the label name as a” HR Manager” and role name will be Automatically populated and click on save.

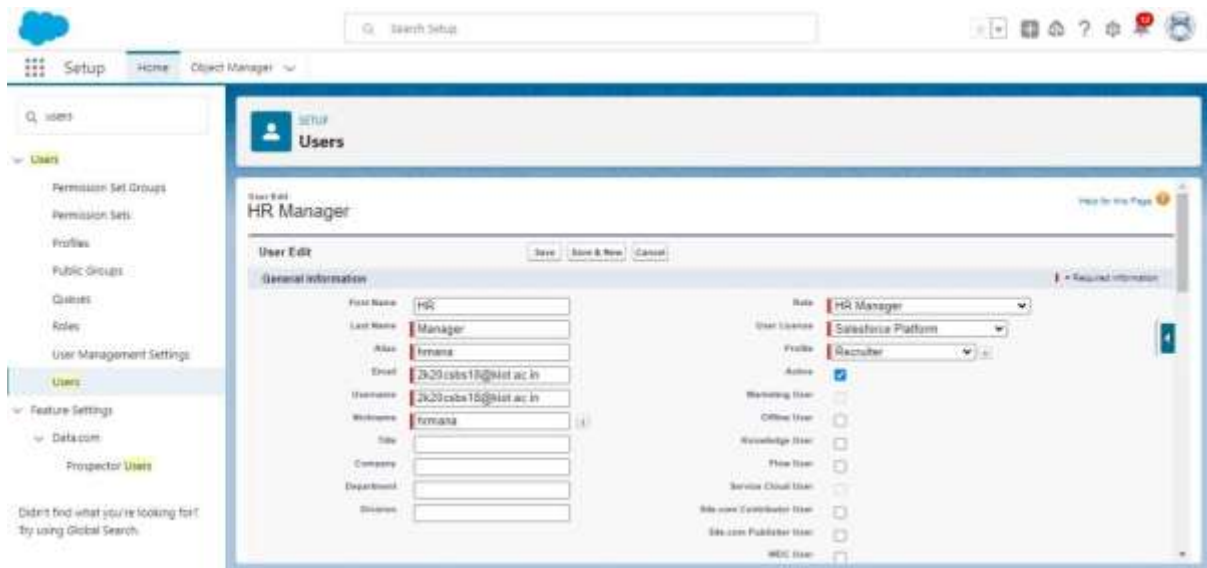


User

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

1)To Create A User

- 1.From Setup, enter Users in the Quick Find box, then select Users.
- 2.Click New User.
- 3.Enter First name as HR and last name as Manager.
- 4.Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.
- 5.Then create a new role HR Manager.
- 6.Select user License as Standard Platform User.
- 7.Select profile (Sale User)



8. Click save

2) To Create A User

1. From Setup, enter Users in the Quick Find box, then select Users.

2. Click New User.

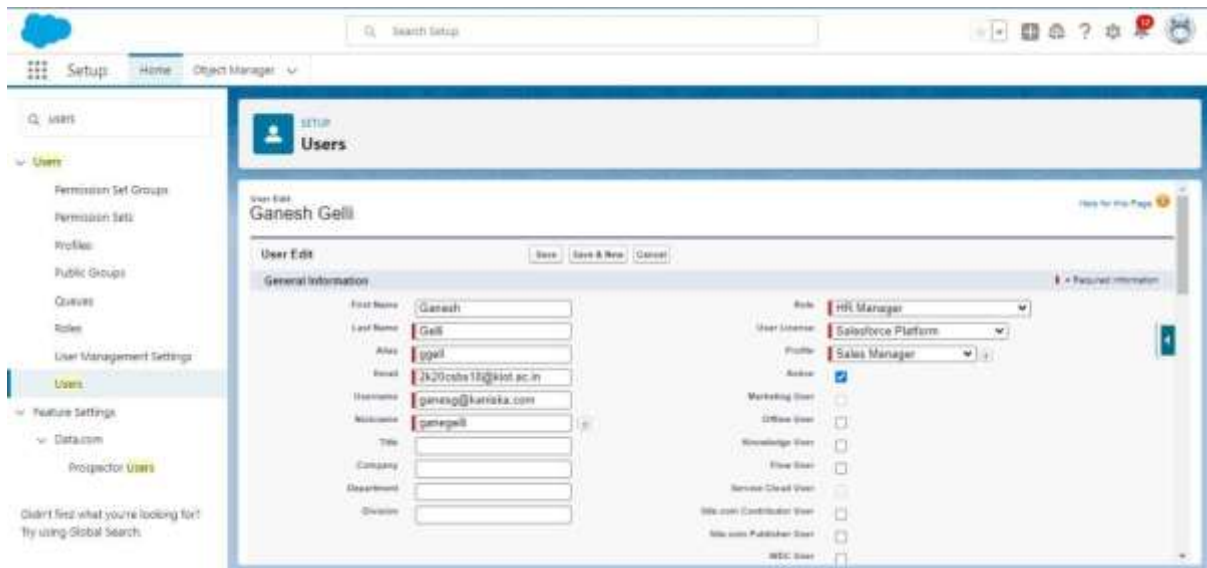
3. Enter First name as Ganesh and last name as Gili.

4. Enter the user's name and email address and a unique username in the form of an email address. By default, the username is the same as the email address.

5. Then create a new role HR Manager.

6. Select user License as Standard Platform User.

7. Select profile (Sales Manager).



Sharing Rules

Sharing rules help users to share records based on conditions. It is basically created for objects whose organization-wide defaults (OWD) are set to public read-only or private because sharing rules can only extend the access and not restrict it.

Types of sharing rules,

- 1.Owner-based Sharing Rules
- 2.Criteria-based Sharing Rules

1)Create A Sharing Rule

- 1.Go to Sharing Settings, which can be found under the Quick Find section.
- 2.Scroll down and find the candidate object where a sharing rule needs to be added, and then click on New to create a new sharing rule.
- 3.Add the label of the sharing rule you want to make.
- 4.Select your rule type based on the criteria.
- 5.Select the field can join immediately check field from the candidate object.
- 6.Select the State as equal and value is Rajasthan.

7.And in selecting the users to share with the section select roles and in that select Hr Manager.

8.And in the section of select the level of access for the users give the access Read/Write.

9.And save the rule.

The screenshot shows the Salesforce 'Sharing Settings' configuration page. The left sidebar contains the 'Setup' menu with 'Sharing Settings' highlighted. The main panel is titled 'Sharing Settings' and includes a note: 'Note: "Roles and subordinates" includes all users in a role, and the ones below that role. You can use sharing rules only to grant wider access to data, not to restrict access.' The configuration is divided into four steps:
Step 1: Rule Name. Fields include Label (Employee id), Rule Name (Employee id), and Description (empty).
Step 2: Select your rule type. Radio buttons for 'Based on group membership' and 'Based on criteria' are shown, with 'Based on criteria' selected.
Step 3: Select which users to be shared. A table with columns 'Criteria', 'Field', 'Operator', 'Value', and 'AND/OR' is visible. The 'Criteria' column has a dropdown menu.
Step 4: Select the users to share with. This section is partially visible at the bottom of the page.

2)Activity 2

Create a Sharing Rule to Share the records of Job Application to Hr Manager with the Access of Read/Write.

Create A Sharing Rule

1.Go to Sharing Settings, which can be found under the Quick Find section.

2.Scroll down and find the Job Application object where a sharing rule needs to be added, and then click on New to create a new sharing rule.

3.Add the label of the sharing rule you want to make.

4.Select your rule type based on the criteria.

5.Select the field can join immediately check field from the Job Application object.

6.Job application number contains some number.

7.And in selecting the users to share with the section select roles and in that select Hr Manager.

8.And in the section of select the level of access for the users give the access Read/Write.

9.And save the rule.

The screenshot shows the 'Sharing Settings' configuration page. The page is divided into several sections:

- Header:** Includes a search bar and navigation tabs for 'Setup', 'Home', and 'Object Manager'.
- Left Sidebar:** Contains a search bar and a list of items including 'Guest User', 'Sharing Rule Access Report', and 'Sharing Settings' (which is currently selected).
- Main Content Area:**
 - Step 1: Rule Name:** Fields for 'Label' (Employee detail), 'Rule Name' (Employee_detail), and 'Description'.
 - Step 2: Select your rule type:** Radio buttons for 'Based on record owner' and 'Based on criteria' (selected).
 - Step 3: Select which records to be shared:** A table with columns 'Field', 'Operator', and 'Value'. The first row is 'Employee ID' with operator 'not equal to' and value 'Values / Support User'. Below it are four rows with 'None' in the Field and Operator columns and empty Value columns.
 - Additional Options:** A checkbox labeled 'Include records owned by users who don't have an assigned role'.
 - Step 4: Select the users to share with:** (This section is partially visible at the bottom).

5.AUTOMATION

Flow:

Flows in Salesforce, a flow is a tool that automates complex business processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows. Flow Builder can be used to build code-like logic without using a programming language. Flows fall into five categories:

- 1.Screen Flows
- 2.Schedule-Triggered Flows
- 3.Autolaunched Flows
- 4.Record-Triggered Flows
- 5.Platform Event-Triggered Flows

1)Create A Record Trigger Flow on Job Object

Step 1: Log in to Salesforce

Step 2: Click on your user icon and select "Setup."

Step 3: In the Setup menu, type "Flows" in the Quick Find box, and then select "Flows" under "Process Automation." Click the "New Flow" button.

Step 4: In the Flow Builder, choose "Record-Triggered Flow" as the flow type. This type of flow is triggered when records are created or updated.

Step 5: Define the object that triggers the flow, in this case, "Employee." Choose whether you want the flow to run when records are created, edited, or both.

Step 6: Use the Flow Builder to add your flow logic. You can use elements like record updates, record lookups, decision elements, and

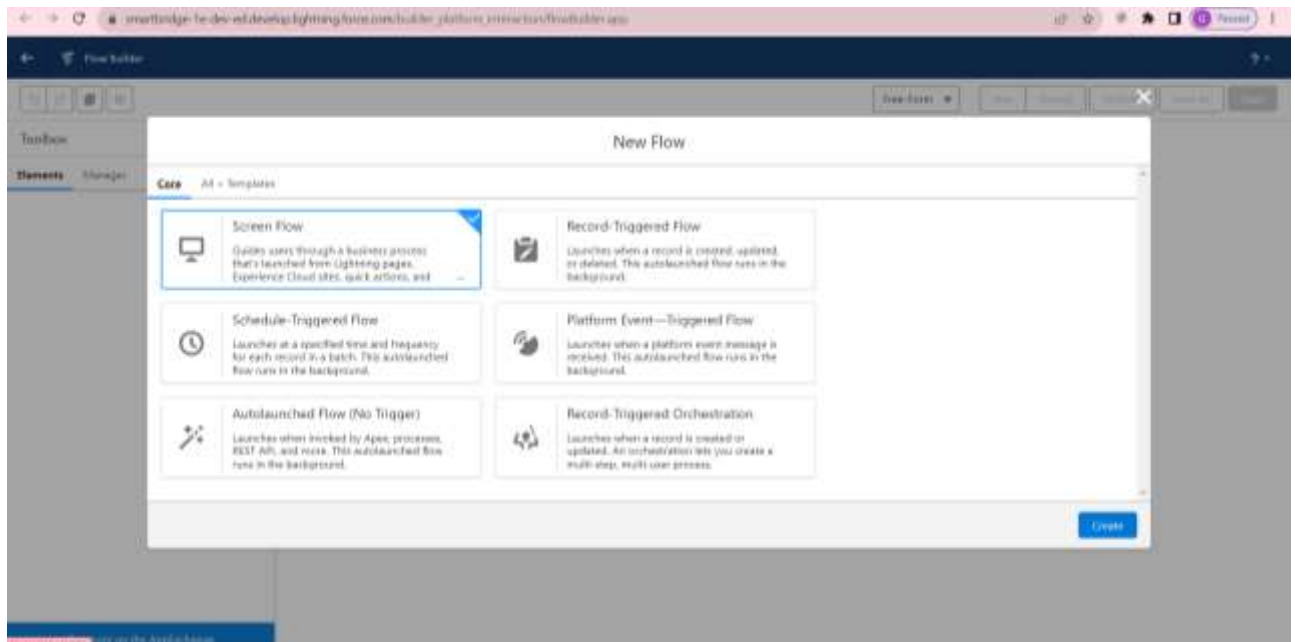
more to define the actions that should occur when a record event is triggered.

Step 7: Define the actions you want the flow to take. For example, you can update related records, send emails, create new records, or execute custom Apex code.

Step 8: Set Flow Variables (Optional)

Step 9: Save the Flow

Step 10: Test the Flow



smartbridge-1e-dc-ed:develop lightning.force.com/builder_platform/interactui/flowBuilder/app

Flow Builder

Select Elements

Auto-Layout Run Settings New Fields Actions Test As Save

Start
Record-Triggered Flow

Object: Employee Detail
Trigger: A record is created
Optimize for Actions and Related Records
+ Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Employee De...

Run Immediately

End

Configure Trigger

Trigger the flow when:

- ☒ A record is created
- ☐ A record is updated
- ☐ A record is created or updated
- ☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None

Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully submitted

smartbridge-1e-dc-ed:develop lightning.force.com/lightning/ui/Travel_Approval__c/a081j0000r6dGVAAS/view

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

Travel Approval TN08

New Contact Edit New Opportunity

Related Details

Travel Approval Name
TN08

Employee Detail
John

Department
CUBS

Destination State
Kerala

Purpose of trip
Business

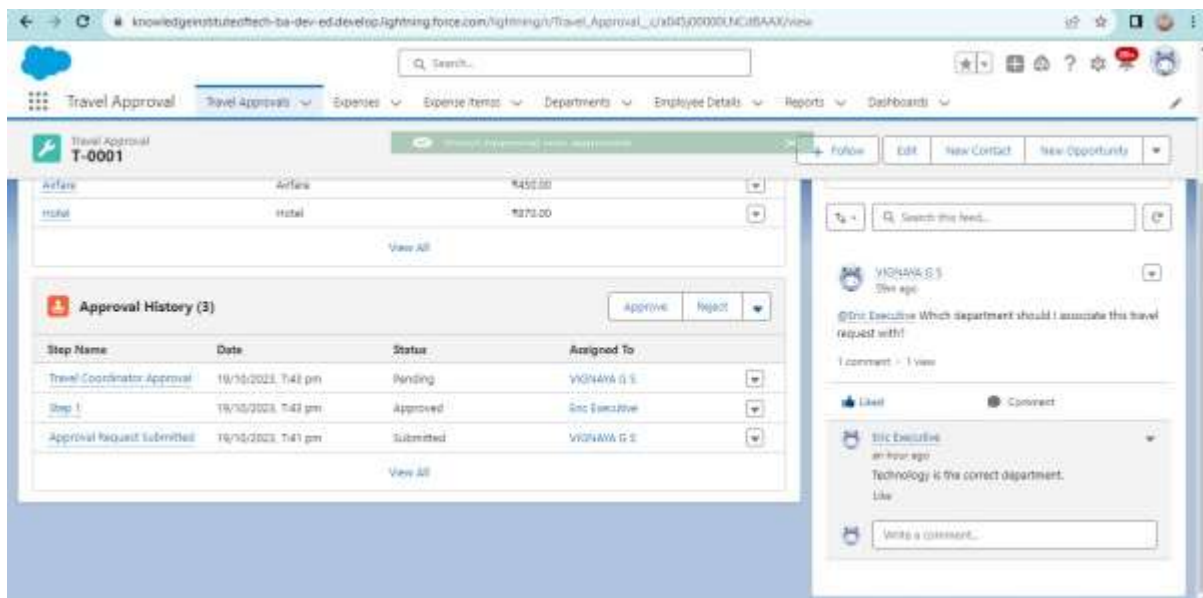
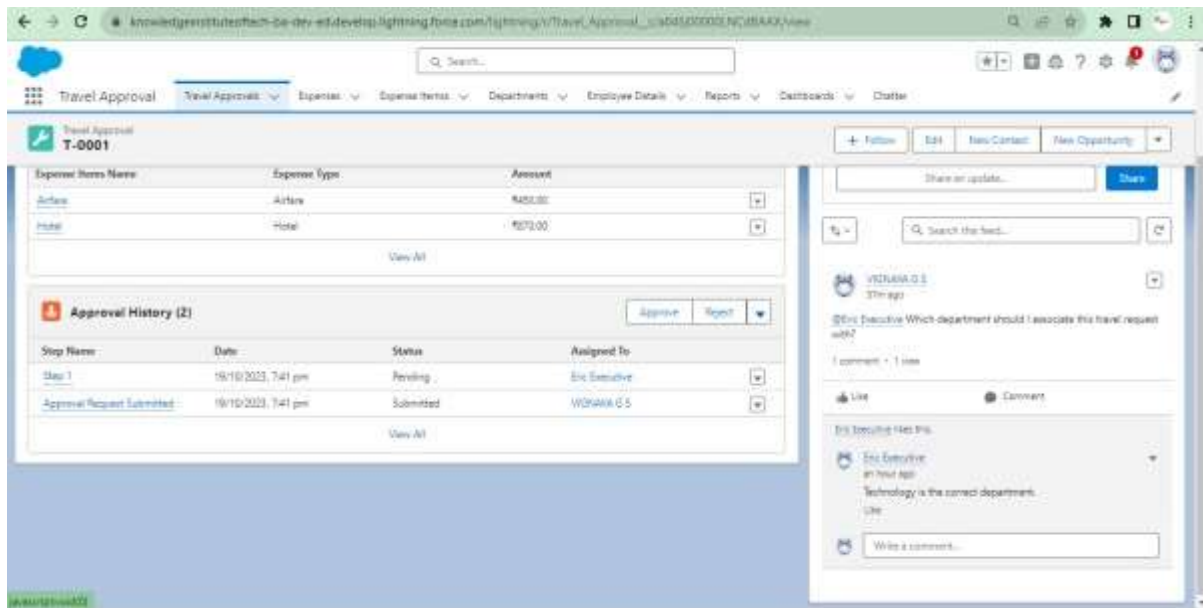
Trip start date
22/10/2023

Trip End date
25/10/2023

Out-of-state
☐

Amount

Owner
GAVATHRI SUBRAMANI



2) Create Another Flow

Step 1: Log in to Salesforce

Step 2: Click on your user icon and select "Setup."

Step 3: In the Setup menu, type "Flows" in the Quick Find box, and then select "Flows" under "Process Automation." Click the "New Flow" button.

Step 4: Select the type of flow you want to create based on the specific process or automation you need. You can choose between "Auto launched Flow" or "Screen Flow."

Step 5: Design the Flow:

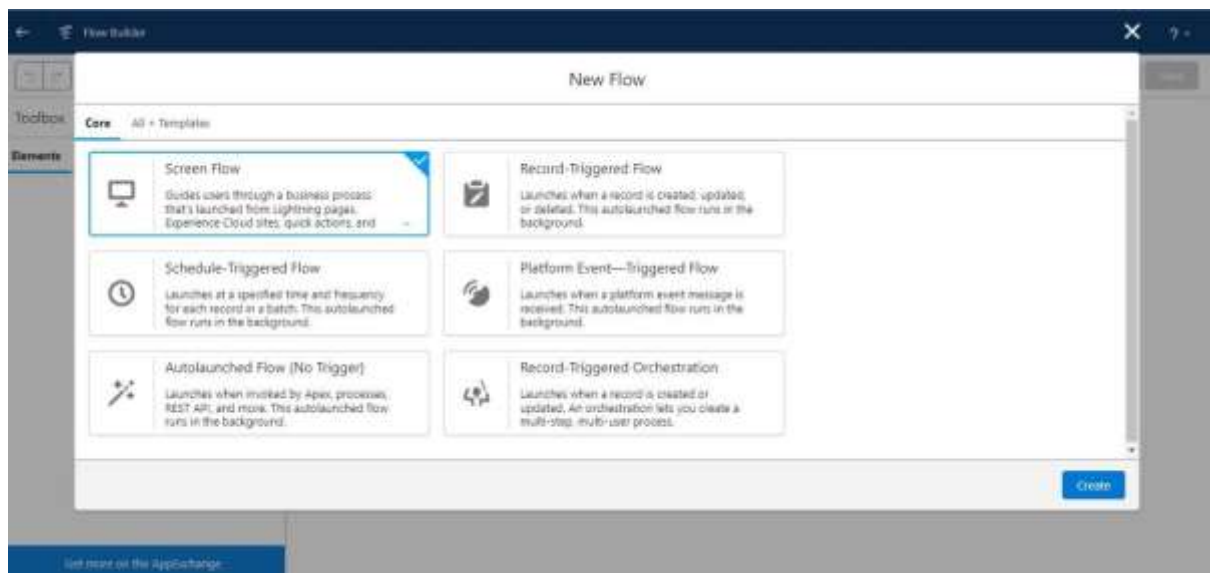
Step 6: Configure Flow Logic

Step 7: Set Flow Variables (Optional)

Step 8: Save the Flow

Step 9: Activate the Flow

Step 10: Test the Flow



knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/report/home?queryScope=cmp

Travel Approval

Travel Approvals Expenses Expense Items Departments Employee Details Reports Dashboards Chatter

Reports

Recent

1 item

REPORTS

Report Name	Description	Folder	Created By	Created On	Subscribed
Sample Flow Report: Screen Flow	Which flow run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	17/10/2023, 8:01 pm	

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/console/app#my3627wb256rREZWYQNYZX8vcrQzOnkrGlydCtUWwKXCLChPRlygW11d...

Travel Approval

Travel Approvals Expenses Expense Items Departments Employee Details Reports Dashboards Chatter

Create Report

Category

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

File and Content Reports

Individuals

Other Reports

Hidden Report Types

Select a Report Type

Search Report Types...

Report Type Name	Category
Departments	Standard
Employee Details	Standard
Employee Details with Department	Standard
Expenses	Standard
Expenses with Employee	Standard
Travel Approvals	Standard
Travel Approvals with Department	Standard
Travel Approvals with Expense Items	Standard
Screen Flow	Custom

Details

Travel Approvals

Standard Report Type

Start Report

Details

Feedback

Created By You

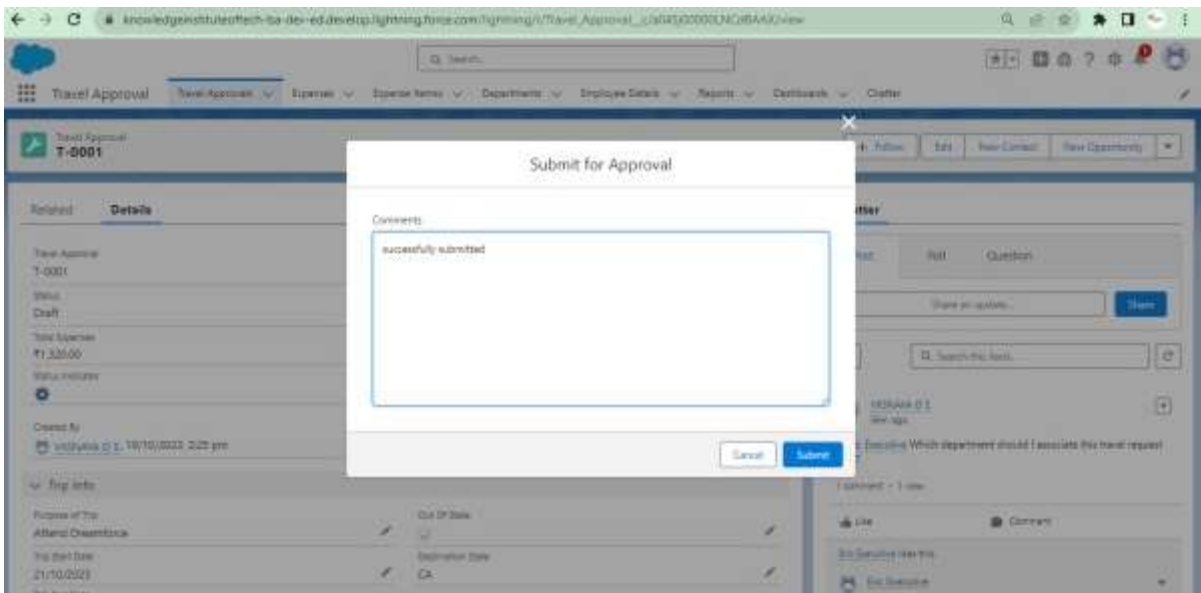
No Reports list

Created By Others

No Reports list

Objects Used in Report Type

Chatter



6.REPORTS & DASHBOARD

Reports

A report is a list of records that meet the criteria you define. It's displayed in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

1)Create A Report

Step 1: Log in to your Salesforce account with the necessary permissions.

Step 2: Click on the "App Launcher" (grid icon) and search for "Reports." Click on "Reports" to open the Report Builder.

Step 3: In the Report Builder, click the "New Report" button to start creating a new report.

Step 4: Select the report type that aligns with the data you want to analyse. You can choose from standard objects like "Travel Request" or create custom report types if needed.

Step 5: Define criteria for your report by selecting the fields and filters that are relevant to your analysis.

Step 6: Select the fields you want to include as columns in your report. This will determine the data that appears in the report results.

Step 7: If necessary, you can group and summarize data to create subtotals or aggregate values based on specific fields.

Step 8: After configuring the report, click the "Save & Run" button to generate the report results.

Step 9: Save the report for future access and make it available to users who need to view the data.

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/r/Report/0001J00000000CAG/view

Q Search...

Travel Approval Travel Approvals Expenses Expense Items Departments Employee Details Reports Dashboards Chatter

Report: Travel Approvals

Travel Requests by Department

Total Records: 48 Total Out Of State: 40

Department	Travel Approval	Status	Out Of State	Destination State	Trip Start Date	Trip End Date
Audit Services (S)	1-0029	Rejected	<input checked="" type="checkbox"/>	FL	31/03/2022	04/06/2022
	1-0031	Rejected	<input checked="" type="checkbox"/>	CA	22/11/2022	28/11/2022
	1-0040	Rejected	<input checked="" type="checkbox"/>	CA	07/04/2022	18/04/2022
	1-0035	Rejected	<input checked="" type="checkbox"/>	FL	28/08/2022	14/09/2022
Subtotal			4			
Quantity Determination Bureau (H)	1-0030	Rejected	<input type="checkbox"/>	TX	15/09/2022	15/09/2022
	1-0041	Rejected	<input checked="" type="checkbox"/>	OK	20/12/2022	20/12/2022
	1-0036	Rejected	<input checked="" type="checkbox"/>	OK	06/03/2022	07/03/2022
	1-0011	Rejected	<input checked="" type="checkbox"/>	CA	25/07/2022	09/07/2022
Subtotal			3			
Division of Aging (S)	1-0032	Rejected	<input checked="" type="checkbox"/>	CA	08/06/2022	22/06/2022
	1-0046	Rejected	<input type="checkbox"/>	TX	11/02/2022	11/02/2022
	1-0017	Rejected	<input checked="" type="checkbox"/>	CA	24/12/2022	09/01/2023
Subtotal			2			

New Columns ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/r/Report/0001J00000000CAG/view?queryScope=userPickers

Q Search...

Travel Approval Travel Approvals Expenses Expense Items Departments Employee Details Reports Dashboards Chatter

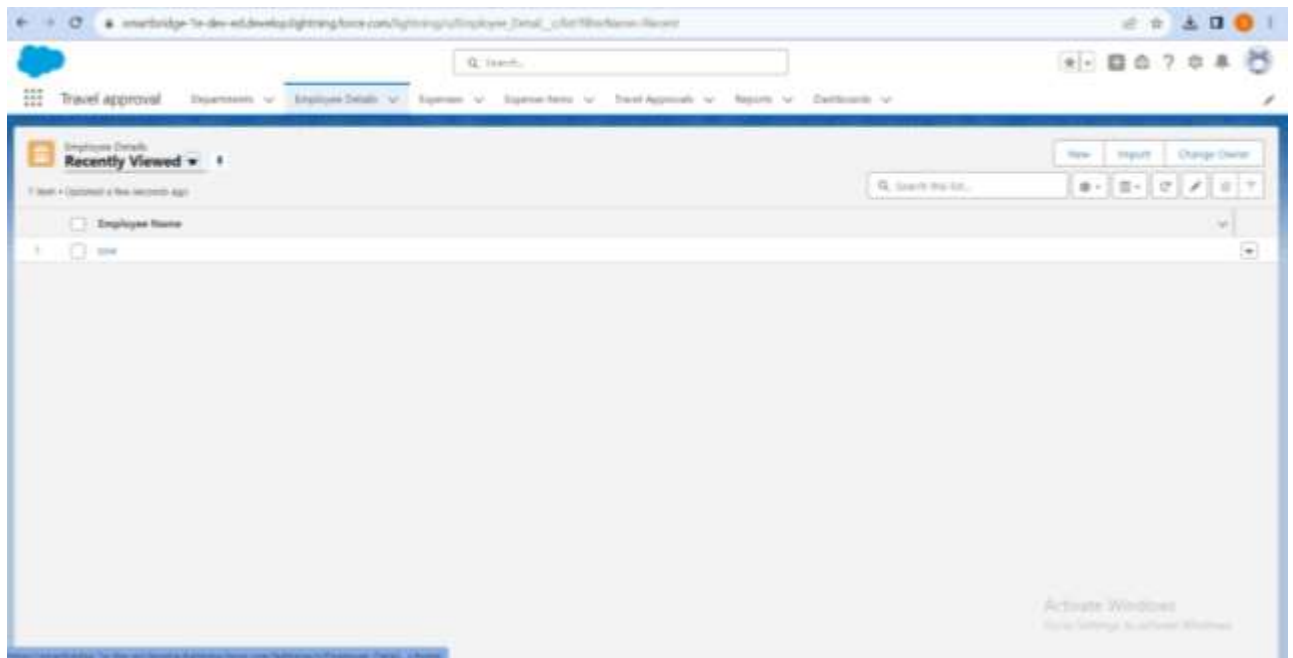
Report: Travel Approvals

Travel Requests by Department

Total Records: 48 Total Out Of State: 40

Department	Travel Approval	Status	Out Of State	Destination State	Trip Start Date	Trip End Date
Audit Services (S)	1-0029	Pending Approval	<input checked="" type="checkbox"/>	FL	31/03/2022	04/06/2022
	1-0031	Approved	<input checked="" type="checkbox"/>	CA	22/11/2022	28/11/2022
	1-0040	Rejected	<input checked="" type="checkbox"/>	CA	07/04/2022	18/04/2022
	1-0035	Rejected	<input checked="" type="checkbox"/>	FL	08/08/2022	14/08/2022
Subtotal			4			
Quantity Determination Bureau (H)	1-0030	Rejected	<input type="checkbox"/>	TX	15/09/2022	15/09/2022
	1-0041	Rejected	<input checked="" type="checkbox"/>	OK	20/12/2022	20/12/2022
	1-0036	Draft	<input checked="" type="checkbox"/>	OK	06/03/2022	07/03/2022
	1-0011	Submitted	<input checked="" type="checkbox"/>	CA	25/07/2022	09/07/2022
Subtotal			3			
Division of Aging (S)	1-0032	Rejected	<input checked="" type="checkbox"/>	CA	08/06/2022	22/06/2022
	1-0046	Rejected	<input type="checkbox"/>	TX	11/02/2022	11/02/2022
	1-0017	Rejected	<input checked="" type="checkbox"/>	CA	24/12/2022	09/01/2023
Subtotal			2			

New Columns ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒



Dashboard

Dashboards provide more insights than reports as they combine the data from many reports and show a summarized result. Looking at many reports at a time gives the flexibility of combining the results from them quickly. Also, summaries in dashboards help us decide on action plans quicker. The dashboards can contain charts, graphs and Tabular data.

1)Create A Dashboard

Step 1: Log in to Salesforce

Step 2: Access the Dashboard Builder

Step 3: Create a New Dashboard

Step 4: Select the type of dashboard you want to create

Step 5: Name Your Dashboard as "Travel Request Dashboard."

Step 6: Add dashboard components like charts, tables, or lists to your dashboard. These components will display the data from your reports.

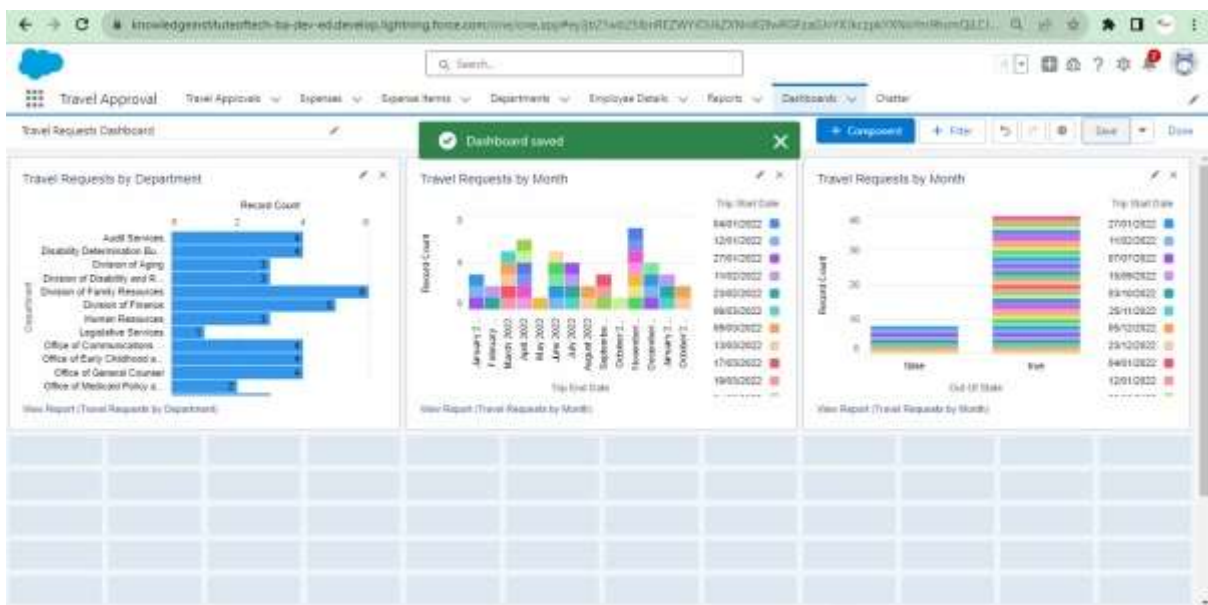
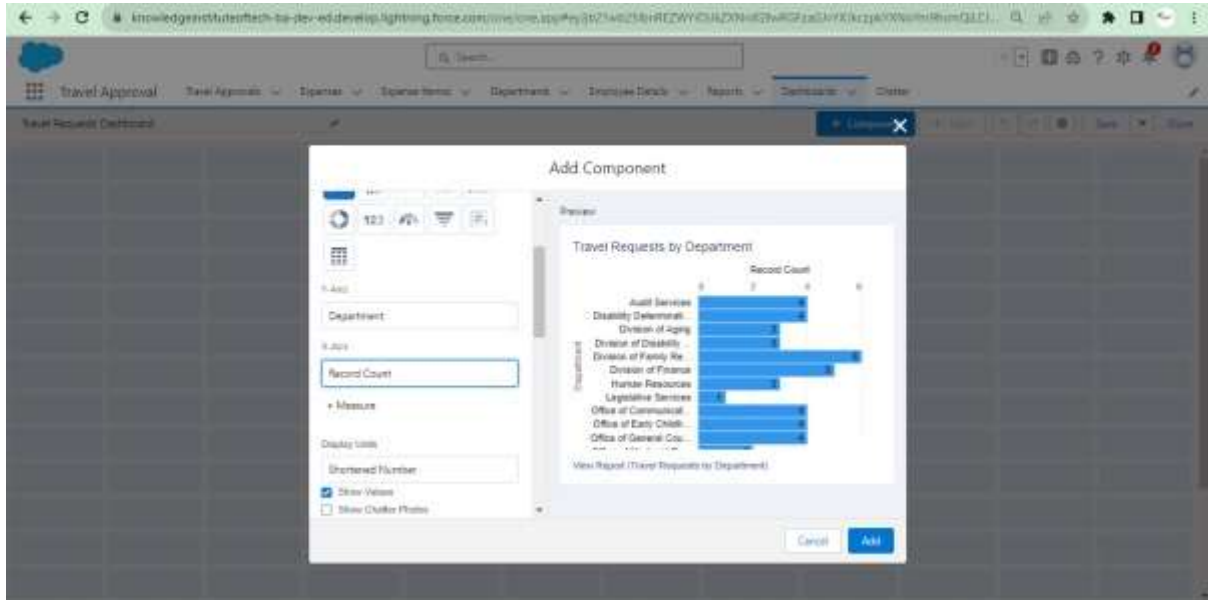
Step 7: Configure each component by selecting the report you want to display, specifying chart types, and setting up filters if needed.

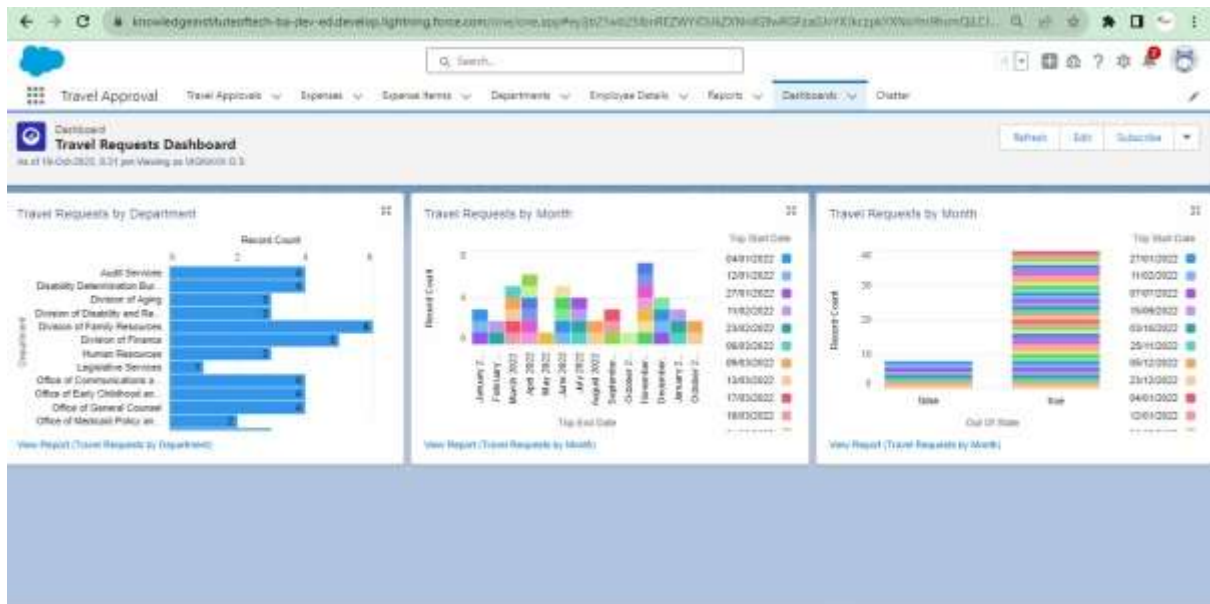
Step 8: Customize Dashboard Layout

Step 9: Save the Dashboard

Step 10: Share the Dashboard

Step 11: Run and View the Dashboard





knowledgeinstitutech-ba-dev-ed.lightning.force.com/lightning/a/Travel_Approval__r?lTtHrName=Report

Q Search...

Travel Approval Travel Approvals Expenses Expense Items Departments Employee Details Reports Dashboards Chatter

Travel Approvals
Recently Viewed

10 Items • Updated a few seconds ago

Q Search this list...

<input type="checkbox"/>	Travel App...	Purpose of Trip	Department	Status	Destination...	Trip Start Date	Trip End Date
1	<input type="checkbox"/> T-0004	Abernathy, Beatty and Laffer	Division of Finance	Approved	CA	09/09/2022	09/09/2022
2	<input type="checkbox"/> T-0011	Roberts Inc	Disability Determination Bureau	Submitted	CA	05/07/2022	09/07/2022
3	<input type="checkbox"/> T-0006	Wider-Herman	Disability Determination Bureau	Draft	OK	06/09/2022	07/03/2022
4	<input type="checkbox"/> T-0003	Olson-Schmidt	Audit Services	Approved	CA	02/11/2022	28/11/2022
5	<input type="checkbox"/> T-0028	Wyman Group	Audit Services	Pending Approval	FL	21/05/2022	04/06/2022
6	<input type="checkbox"/> T-0013	McVee Inc	Human Resources	Submitted	GA	27/08/2022	08/09/2022
7	<input type="checkbox"/> T-0009	East Inc	Office of Early Childhood and Out-of-School Learning	Pending Approval	OK	23/04/2022	05/05/2022
8	<input type="checkbox"/> T-0003	Homerick, Waters and Guckowski	Division of Disability and Rehabilitative Services	Approved	OK	03/04/2022	06/04/2022
9	<input type="checkbox"/> T-0002	Attend Party	Technology	Rejected	TN	24/10/2021	28/10/2021
10	<input type="checkbox"/> T-0001	Attend Dreamforce	Technology	Approved	CA	21/10/2021	24/10/2021

GitHub & Project Video Demo Link

GitHub: <https://github.com/SowmiyaNallapan/Salesforce-Developer>

Video Demo Link:

<https://drive.google.com/file/d/15mnKu9WiTFSVenzpbPhQAempNuxscTQx/view?usp=drivesdk>