BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

SALESFORECE NAAN MUDHALVAN

PROJECT REPORT

Submitted By

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in partial fulfilment for the award of the

degree of

BACHELOR OF TECHNOLOGY

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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Kakapalayam,

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SPOC

HEAD OF THE DEPARTMENT

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.

We express our sincere thanks to our Head of the Department **Dr. M. Ramkumar,** Department of Computer Science and Business Systems for fostering the excellent academic climate in the Department.

We express our pronounced sense of thanks with deepest respect and gratitude to our Faculty Mentor **Mr.B.VENKATARAMANAN,** Department of Computer Science and Business Systems for their valuable and precious guidance and for having amicable relation.

With deep sense of gratitude, we extend our earnest and sincere thanks to our SPOC **Mr. T. Karthikeyan,** Assistant Professor, Department of Computer Science and Engineering for his guidance and encouragement during this project.

We would also like express our thanks to all the faculty members of our Department, friends and students who helped us directly and indirectly in all aspects of the project work to get completed successfully.

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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.

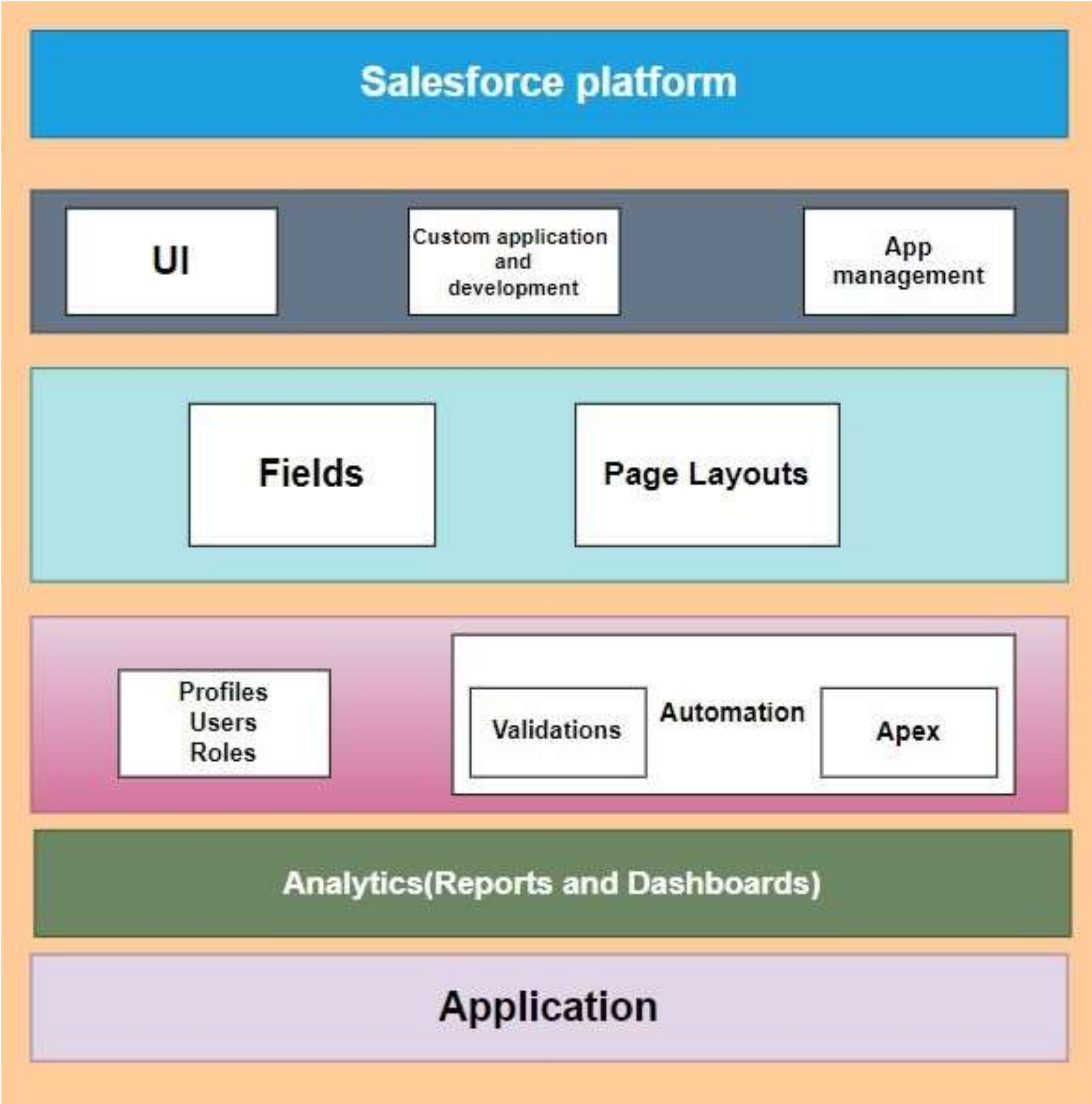
2.2 Project Scope

- **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."

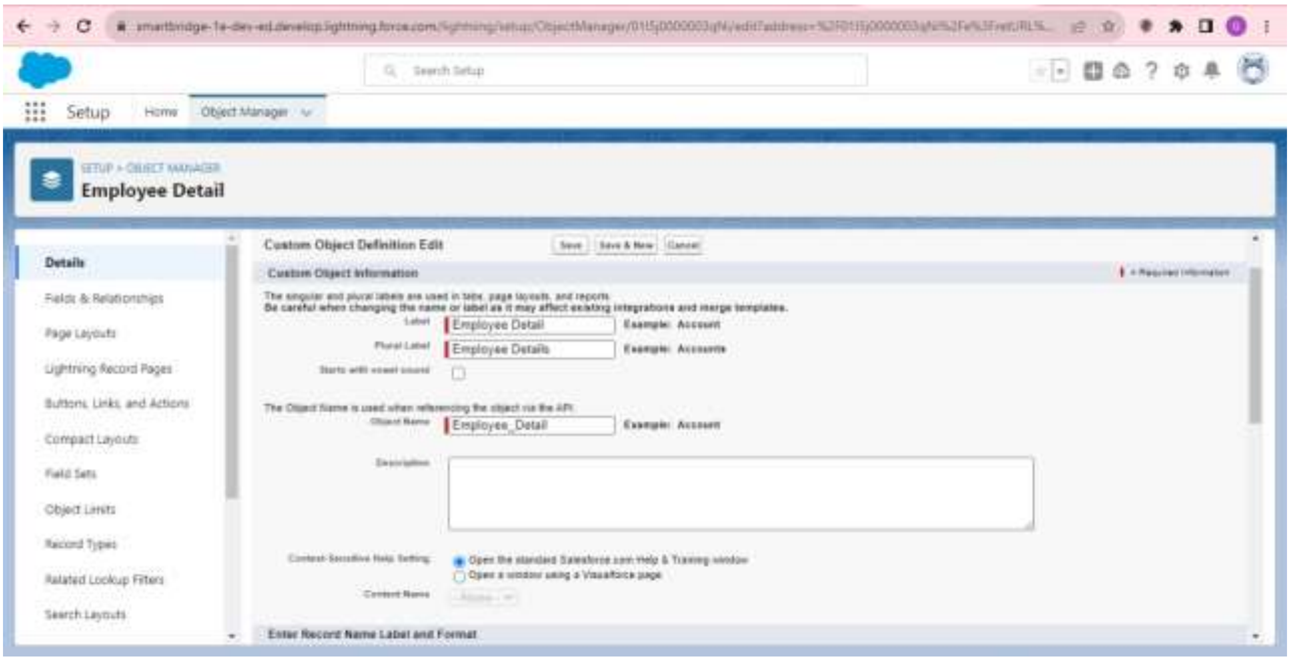
Step 7: Select "Text" as the data type for the record name.

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.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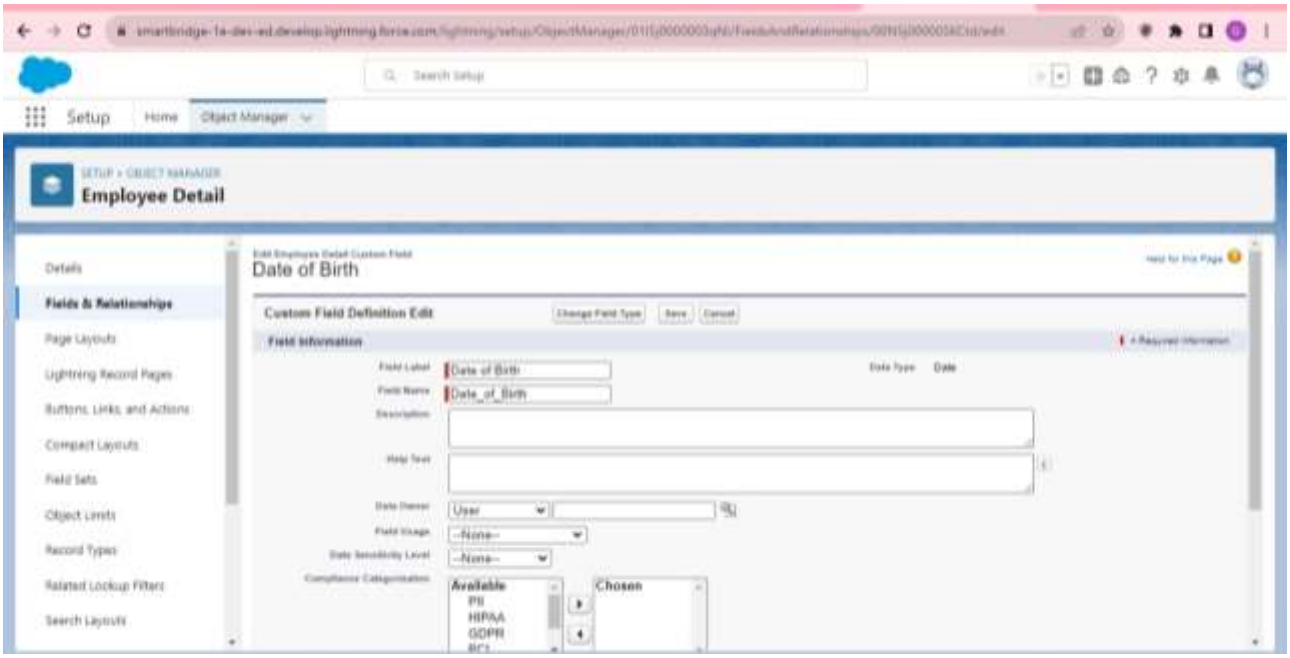
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Employee Detail
Example: Account
Plural Label
Employee Details
Example: Accounts
The Object Name is used when referencing the object via the API.
Object Name
Employee_Detail
Example: Account
Description
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Enter Record Name Label and Format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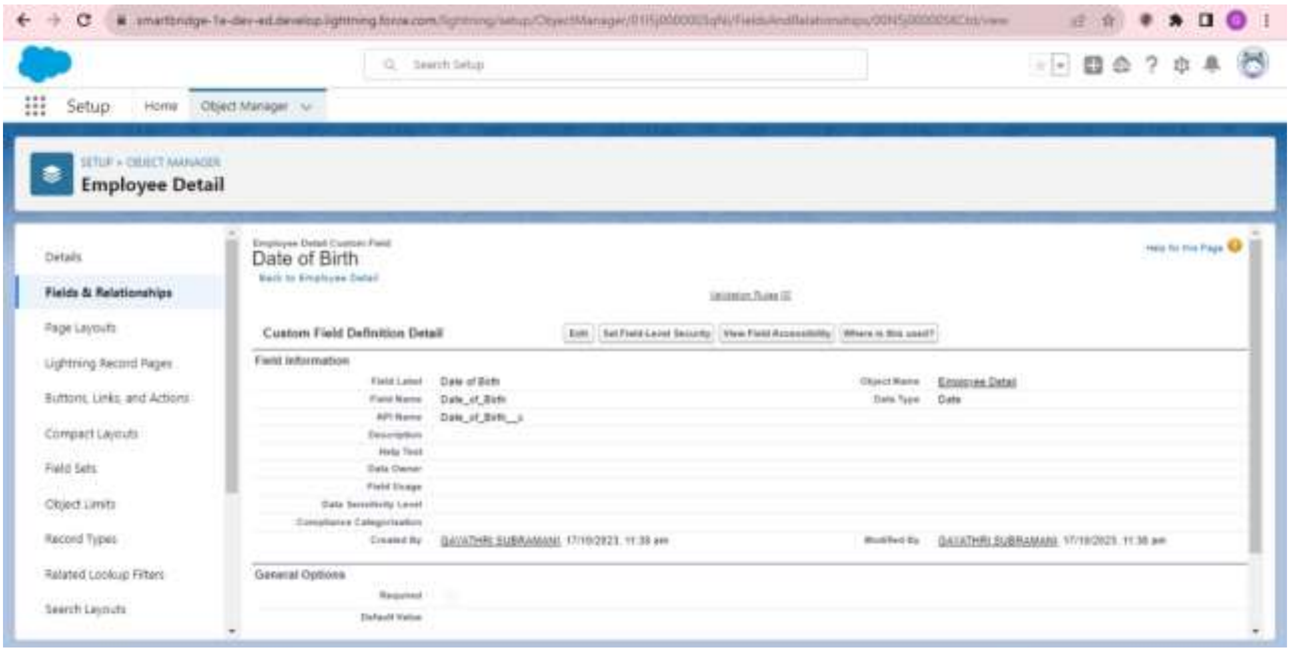
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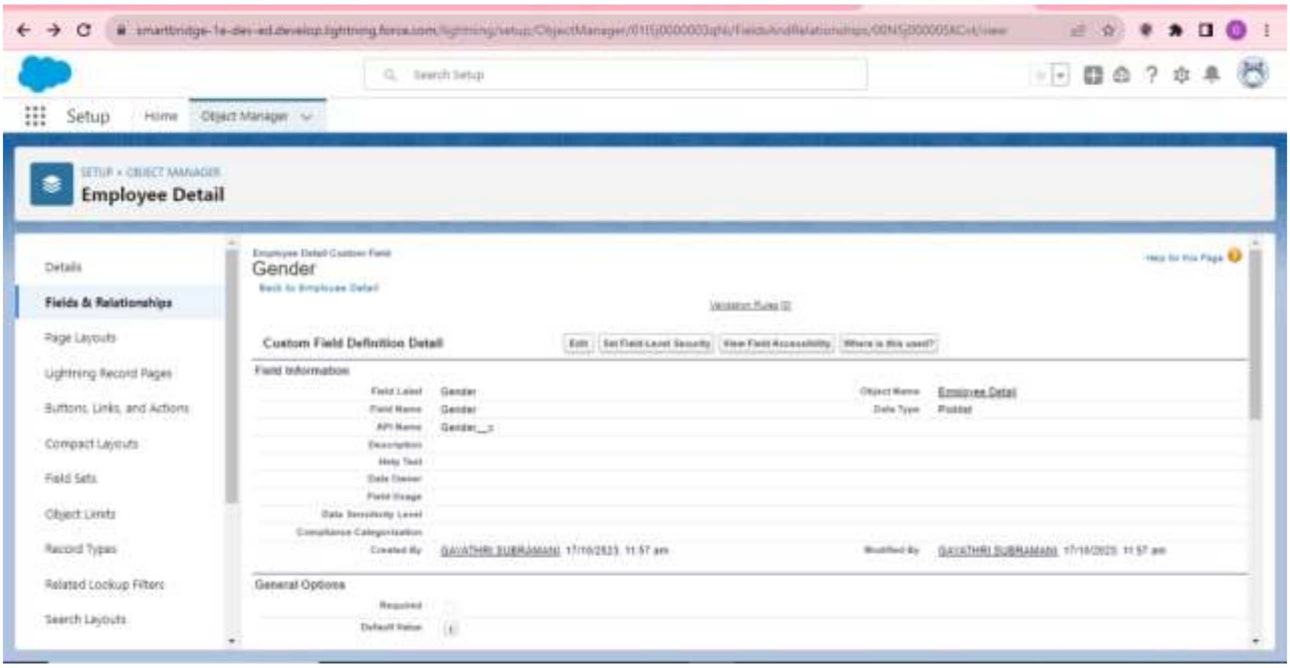
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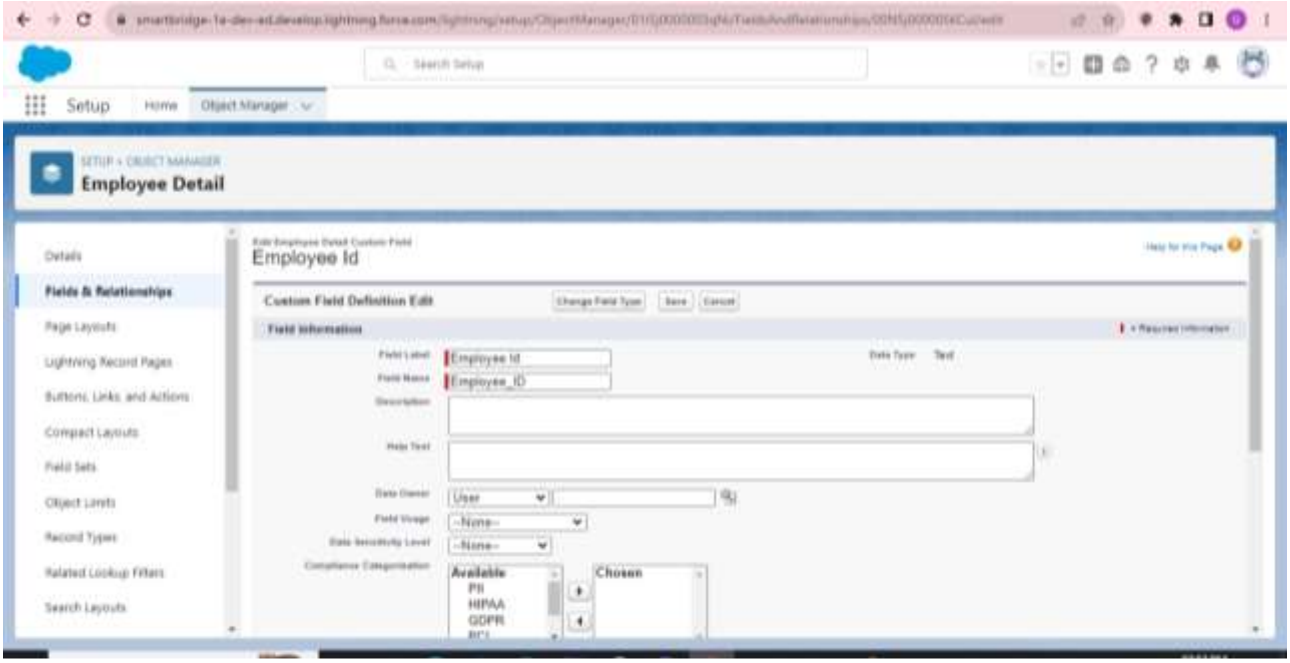
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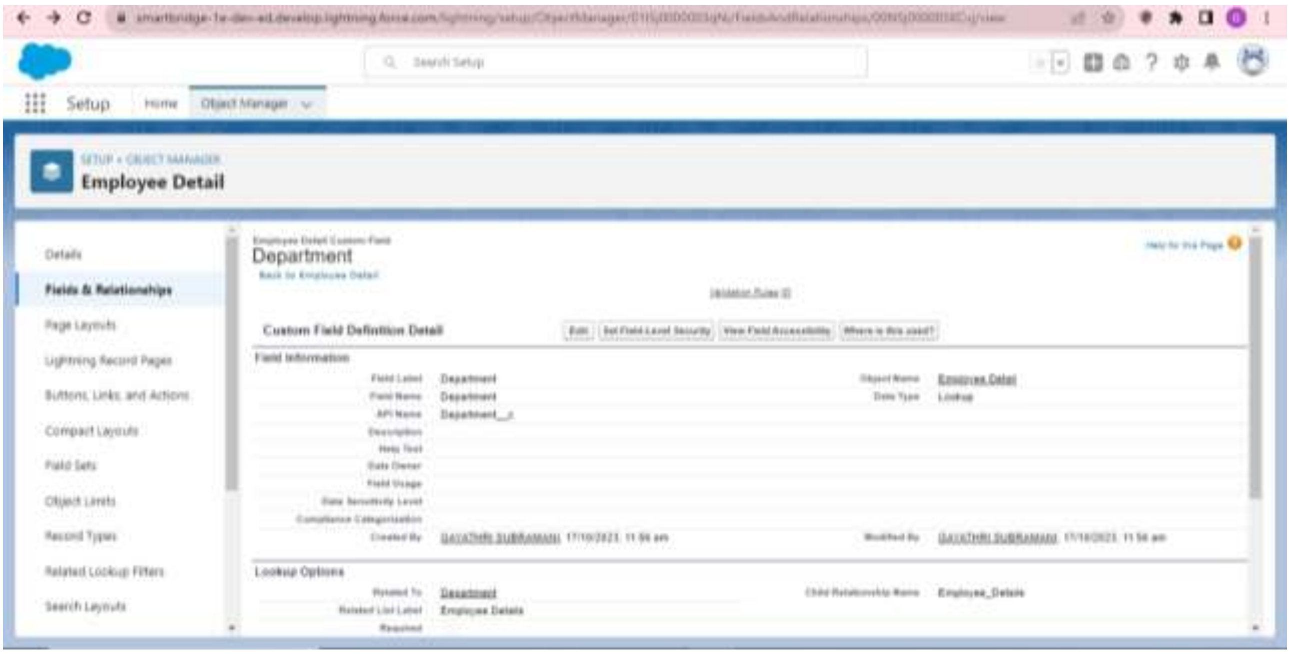
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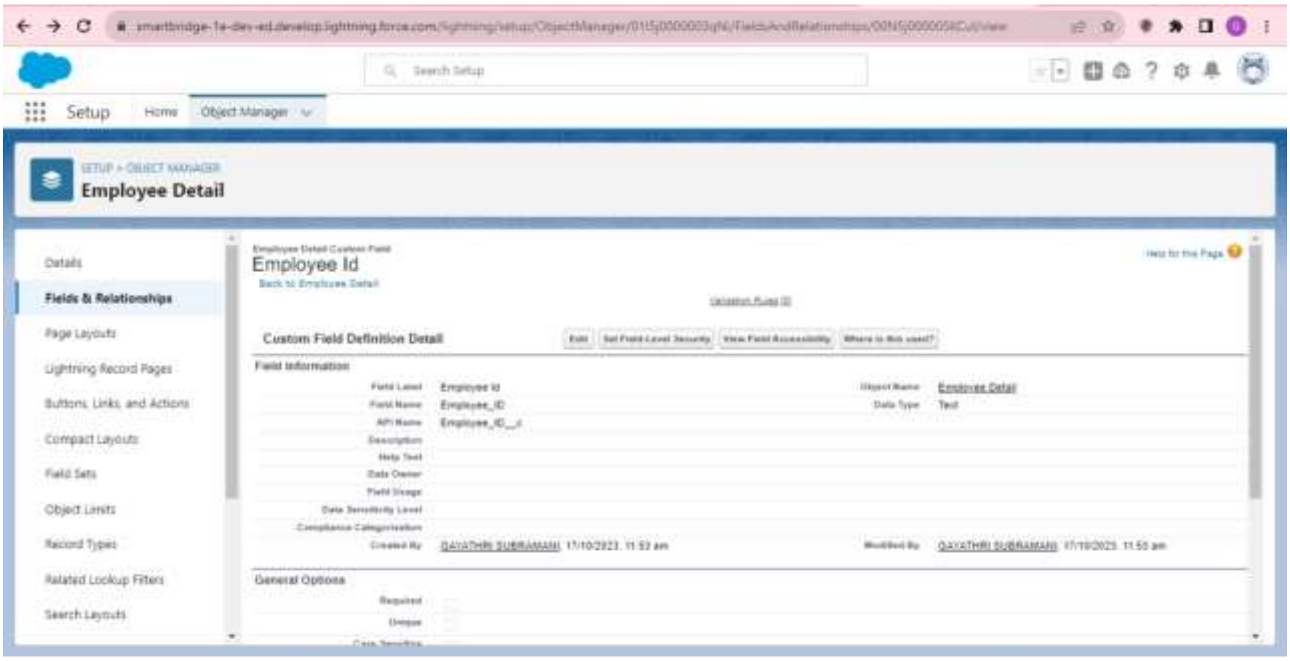
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Data Type
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Created By
GAYATHRI SUBRAMANI 17/10/2023, 11:53 am
Modified By
GAYATHRI SUBRAMANI 17/10/2023, 11:55 am
General Options

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."

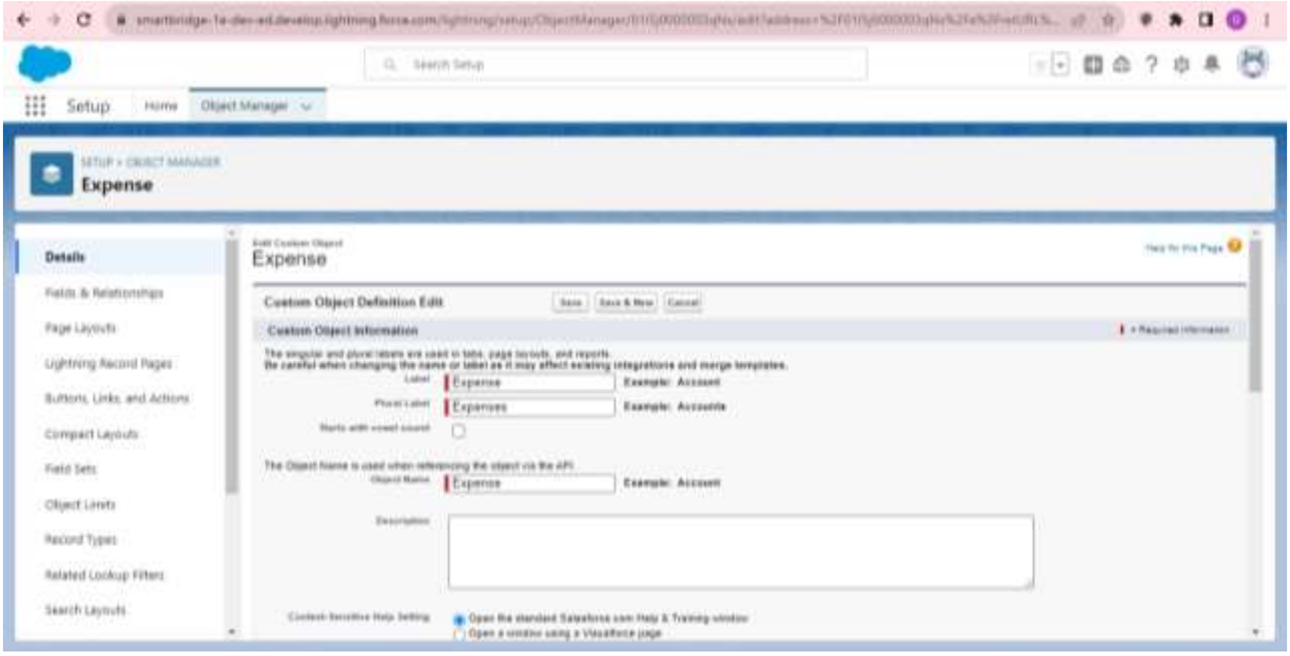
Step 10: Click "Save" to create the "Expense" object.

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.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Example: Account
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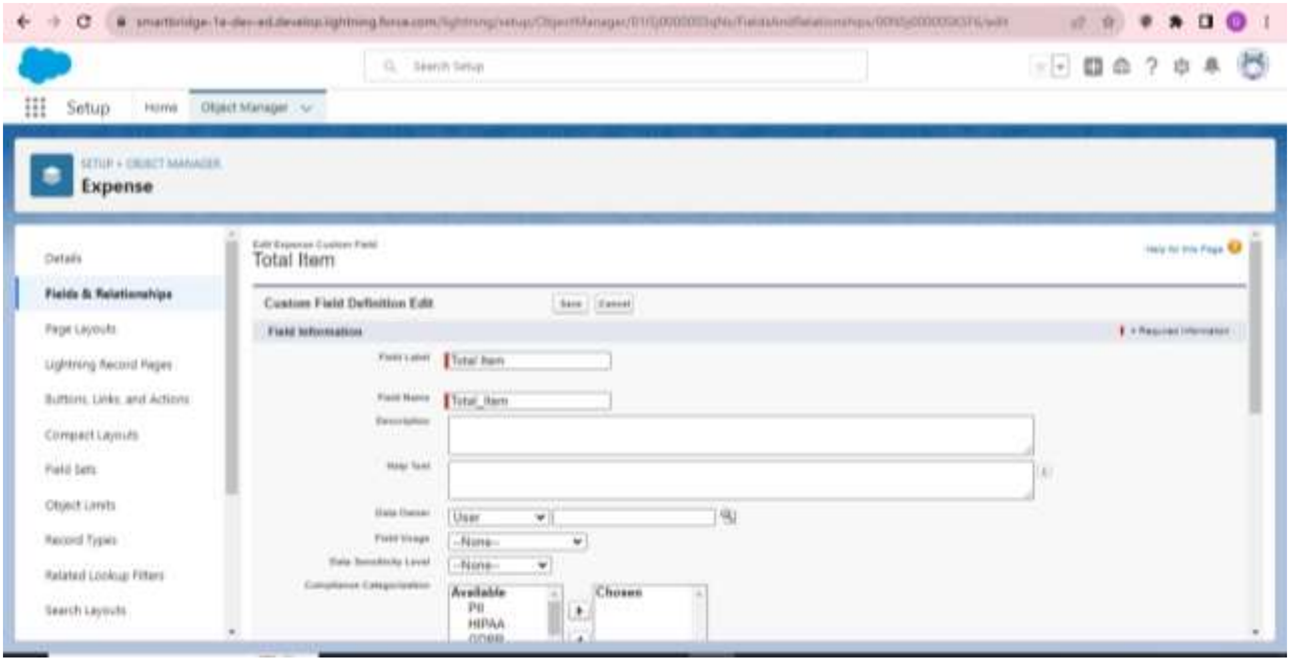
Example: Accounts
Expense
Example: Account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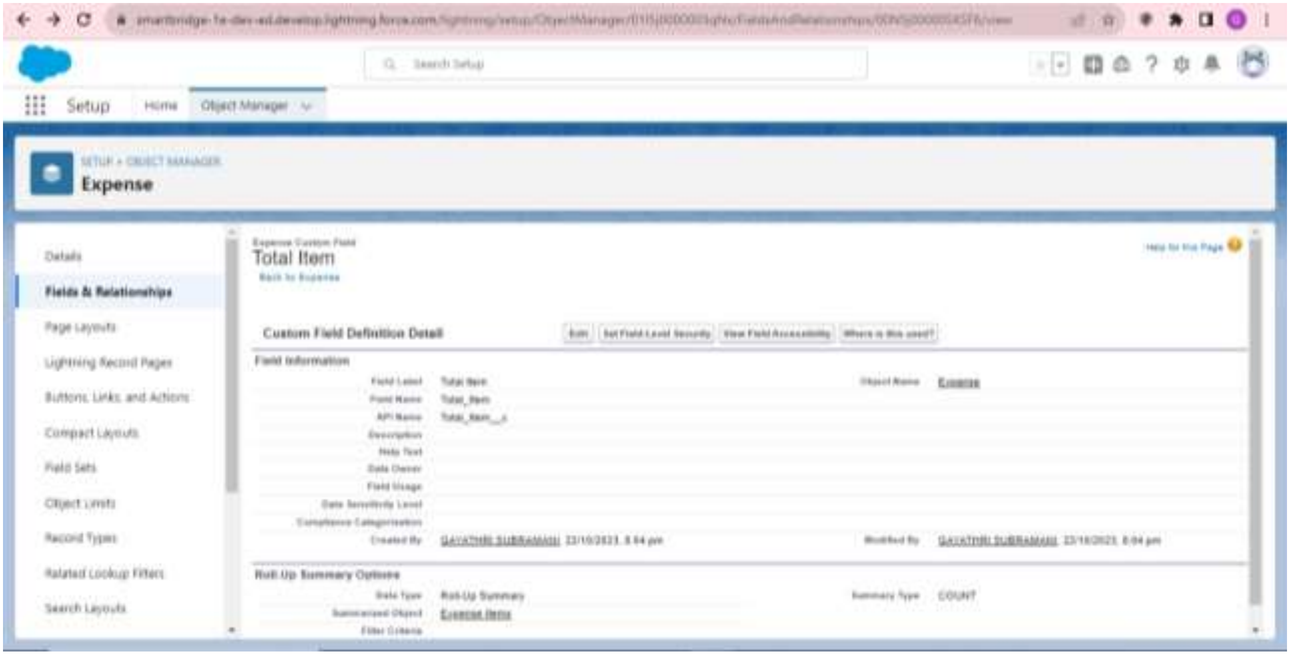
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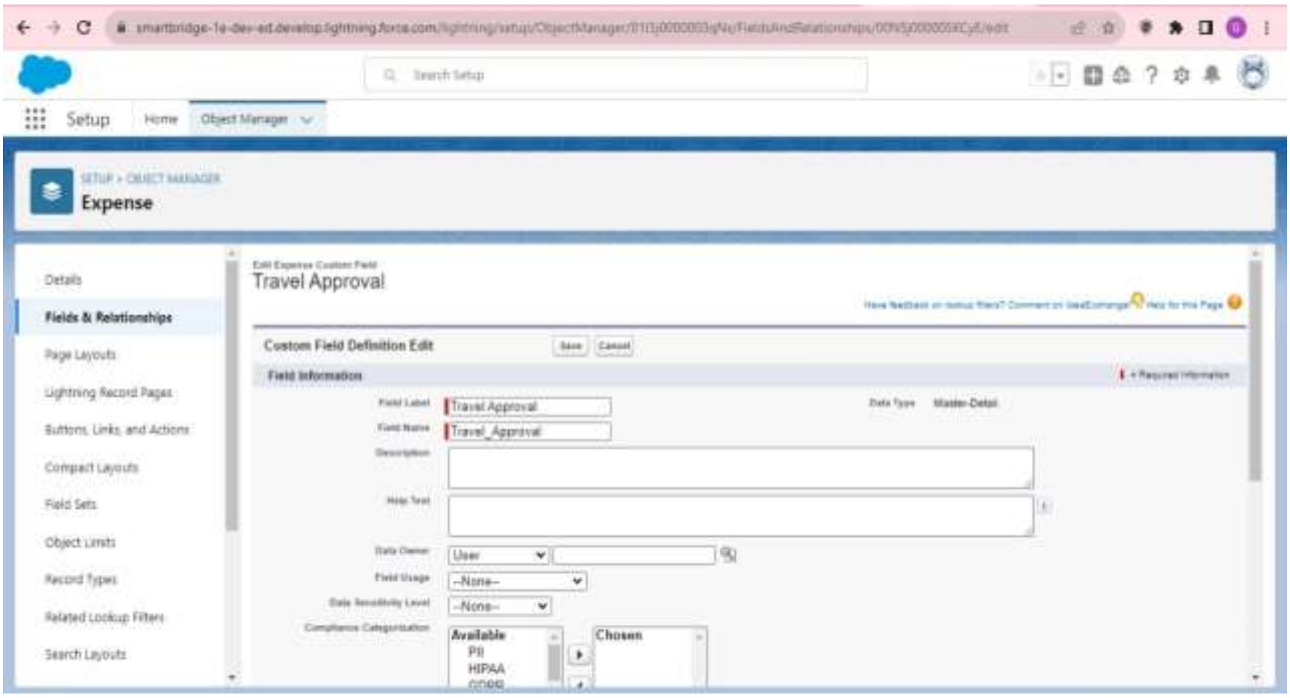
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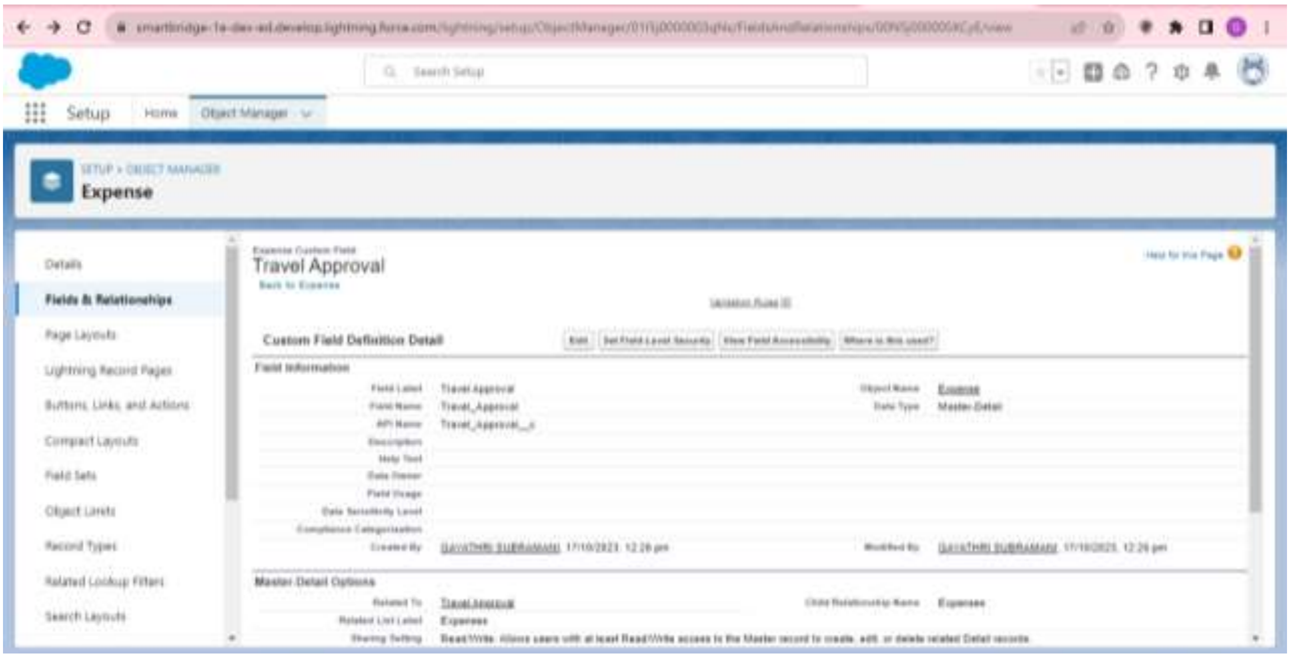


3)Creation of Expense Item:

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."

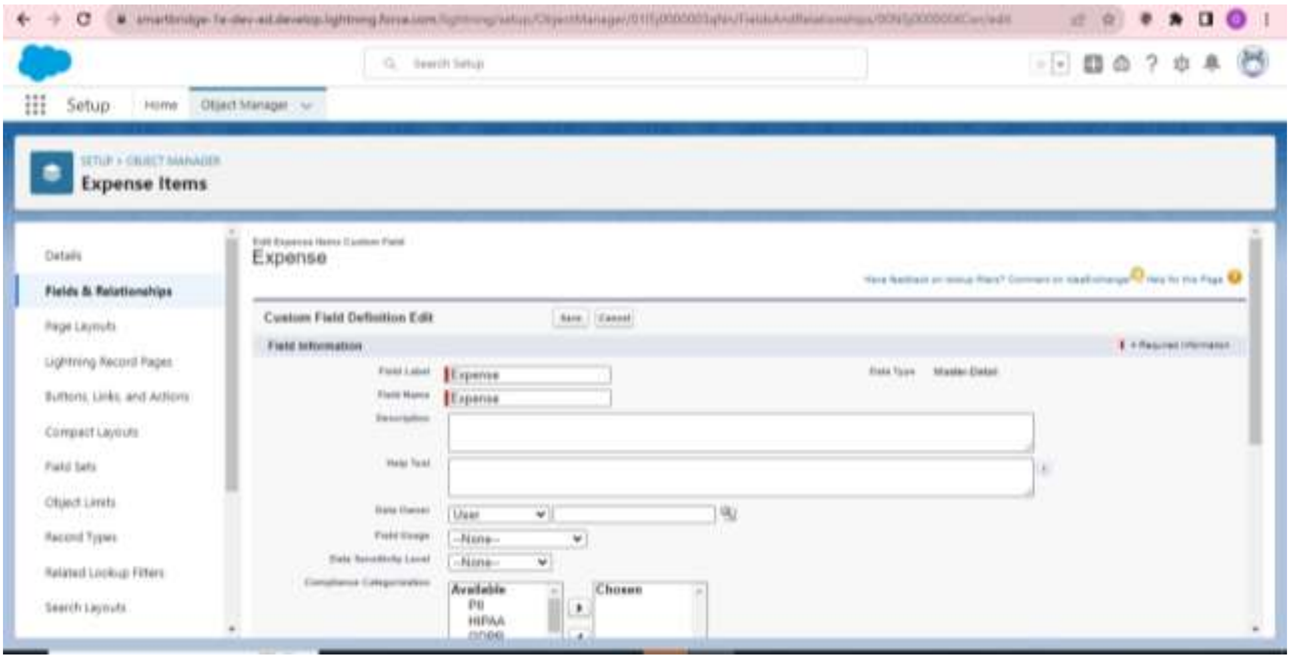
Step 7: Select "Text" as the data type for the record name.

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.



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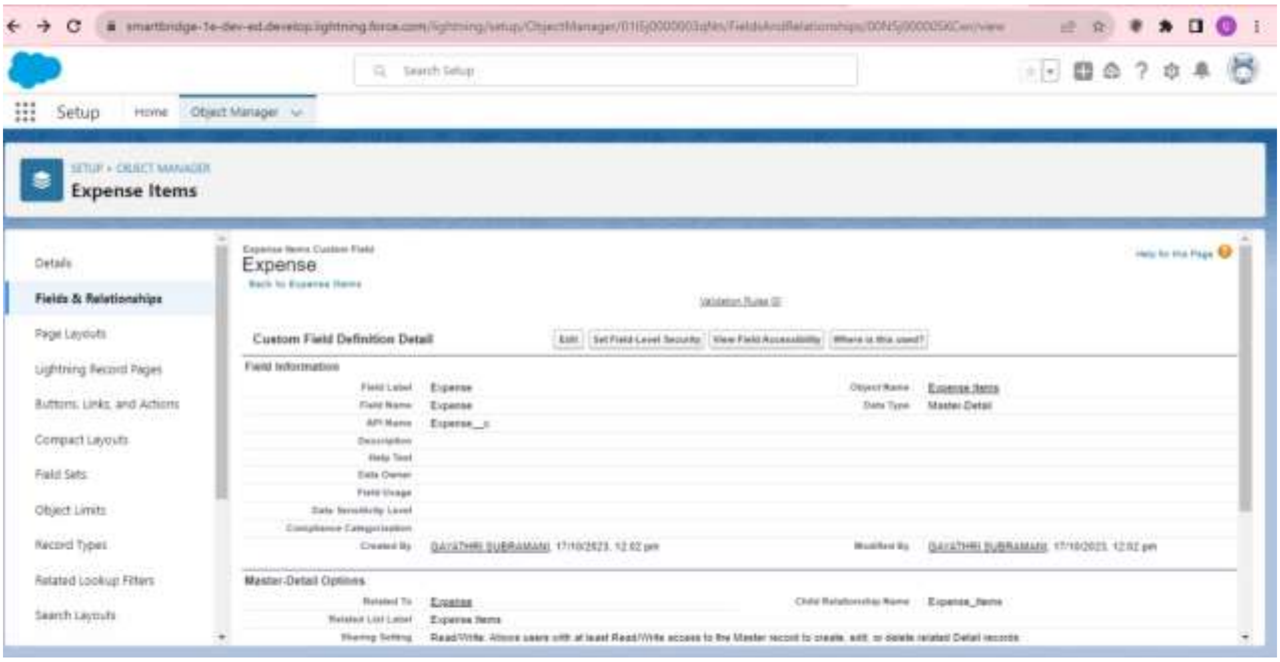

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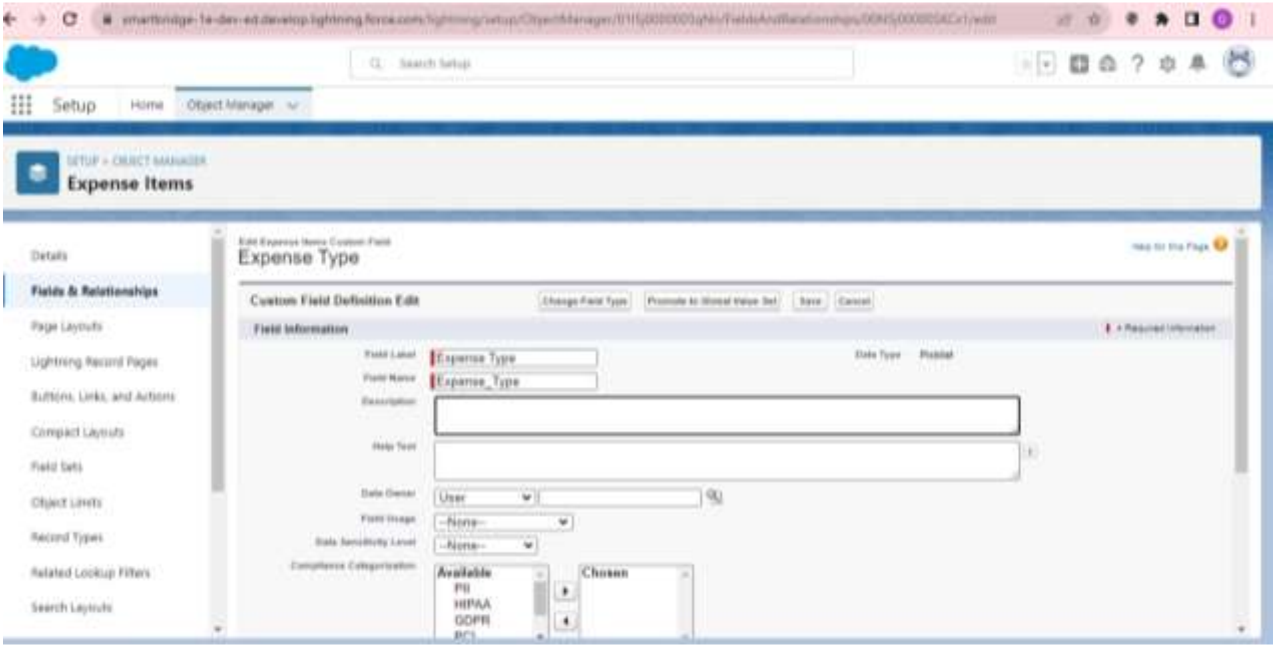
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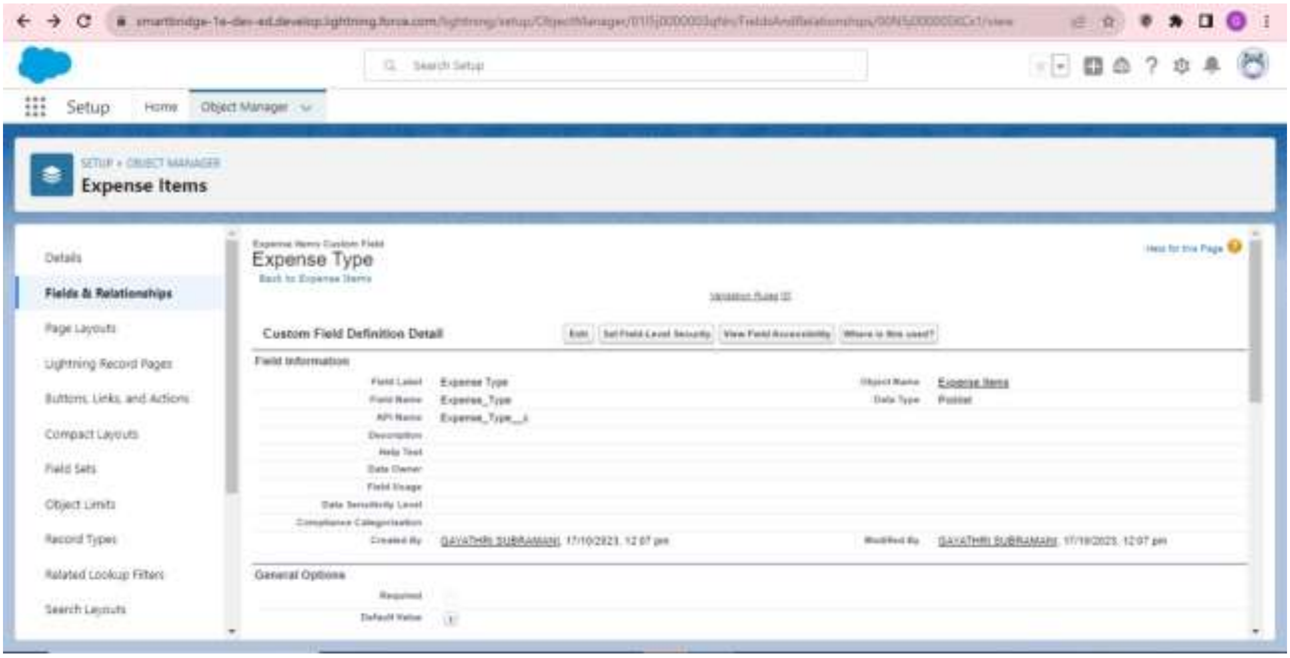
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Custom Field Definition Detail
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Field Information
Field Label
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Expense_Type__c
Data Type
Picklist
General Options

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.

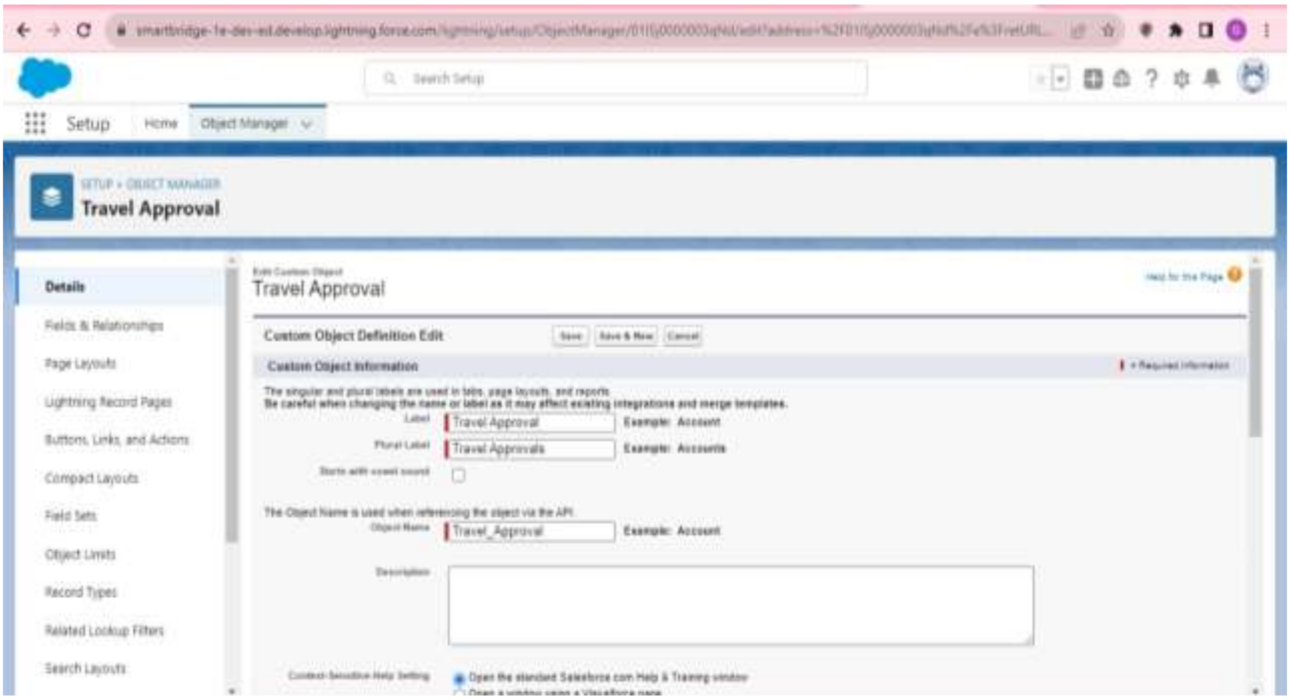
Step 6: Define field-level security settings to control who can view and edit the "Travel Approval" field.

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.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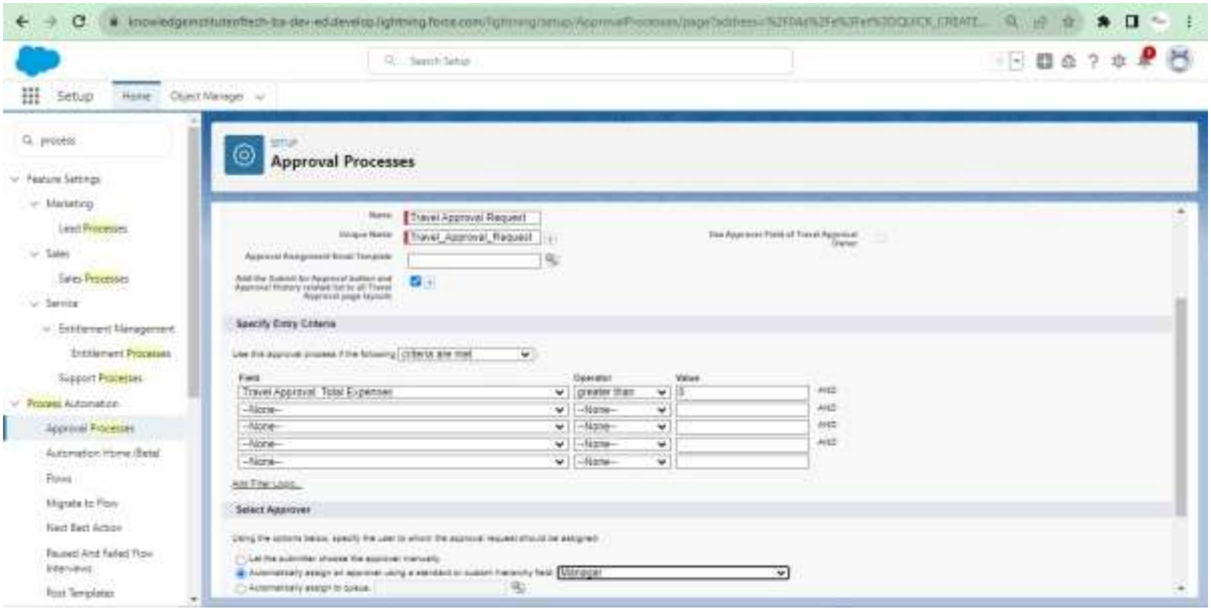
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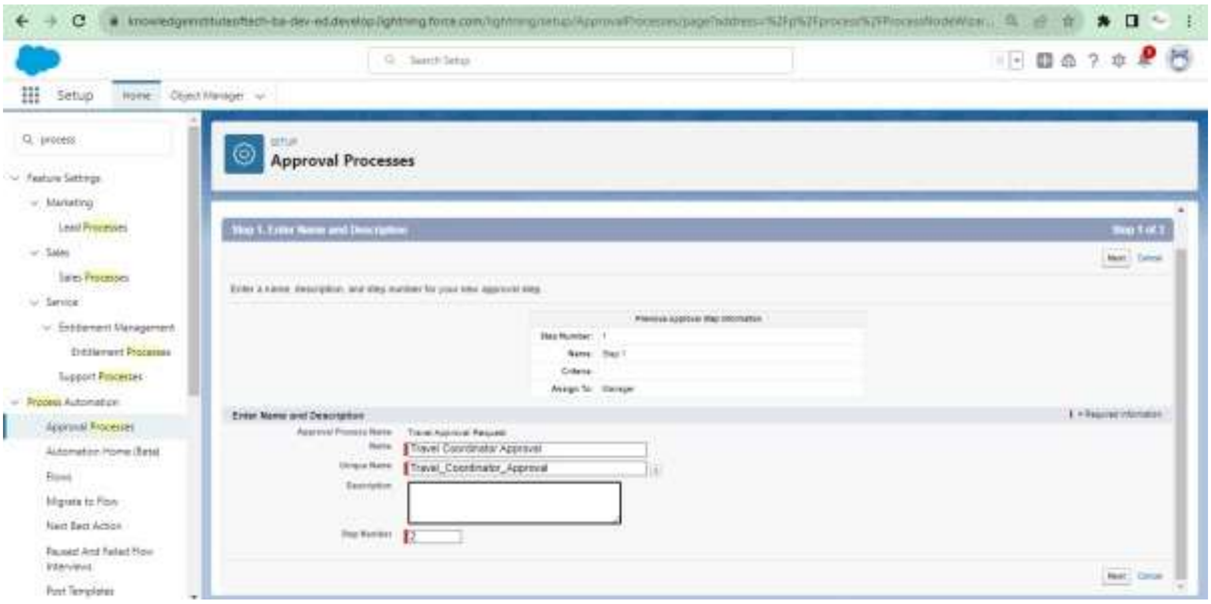
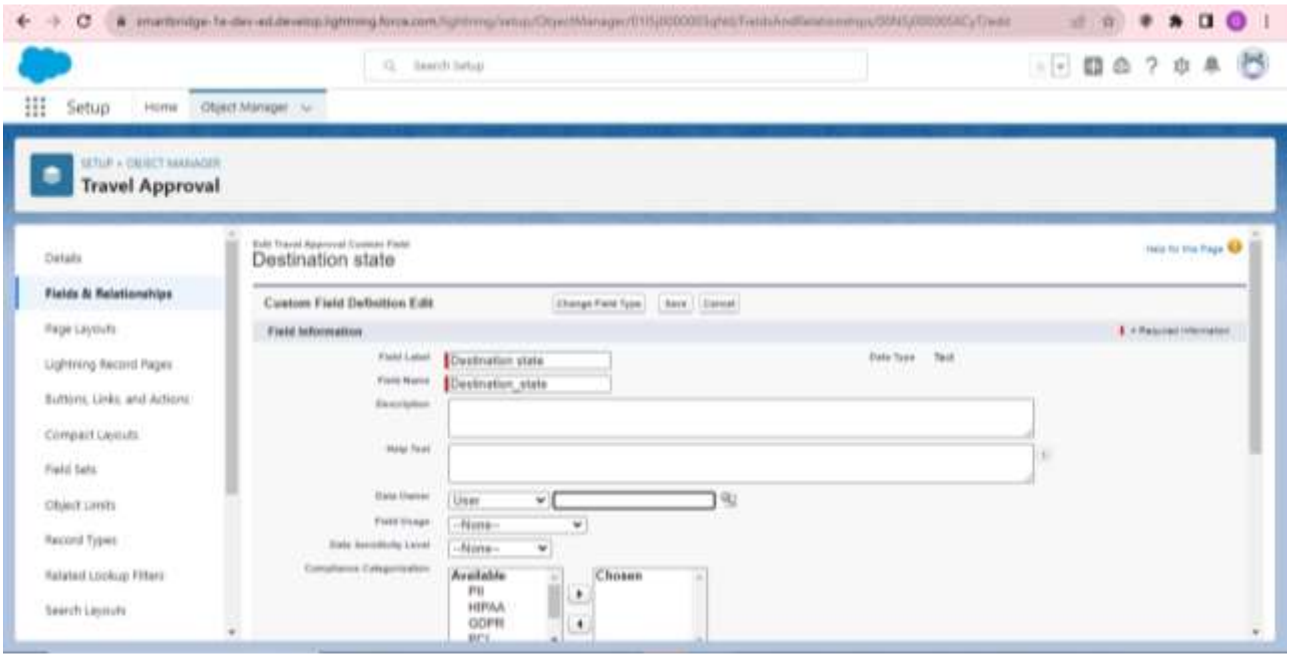
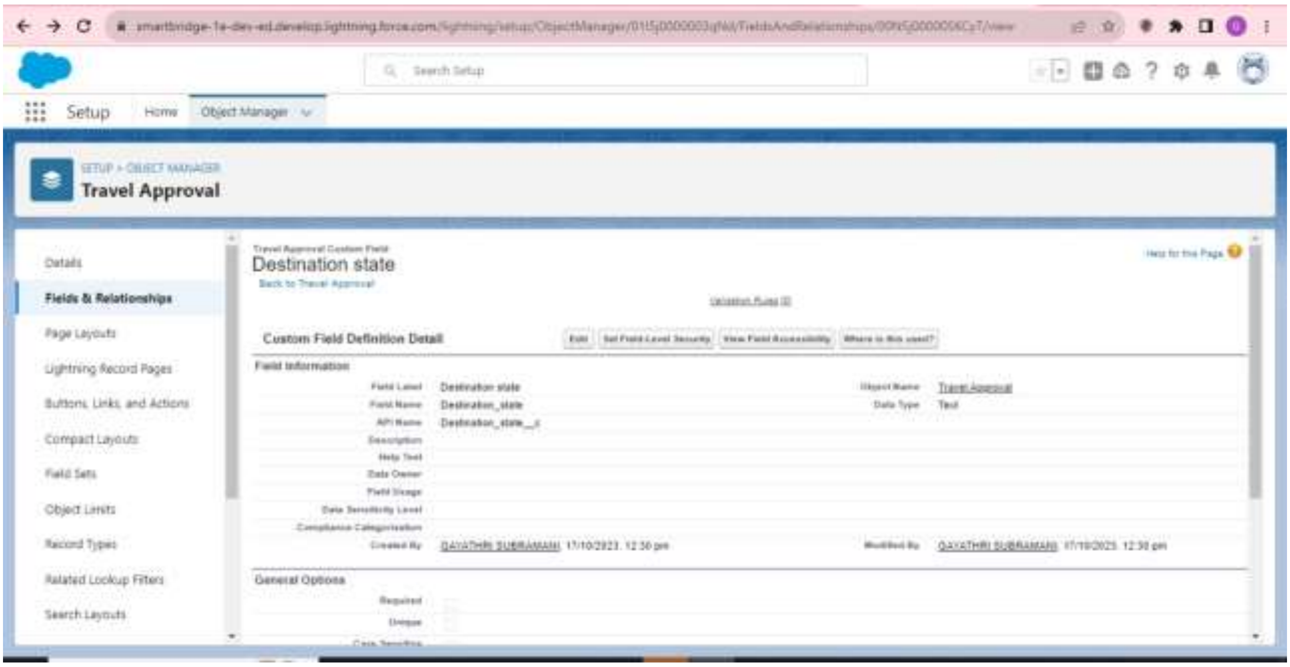
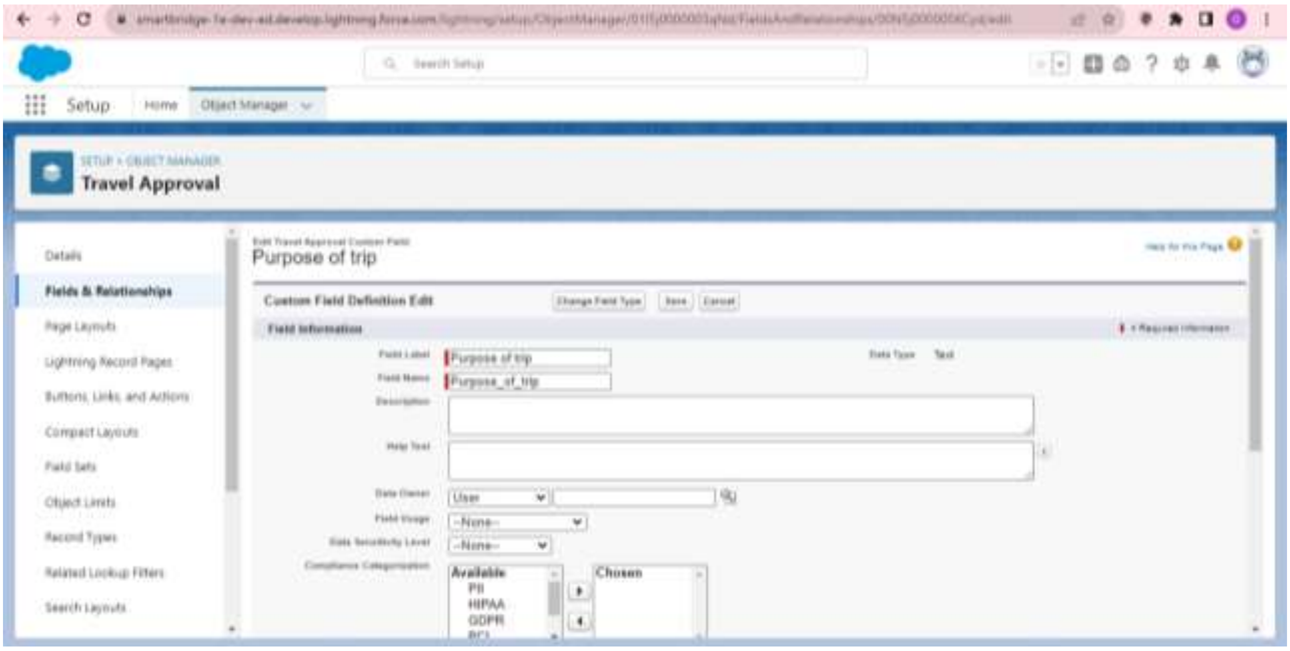
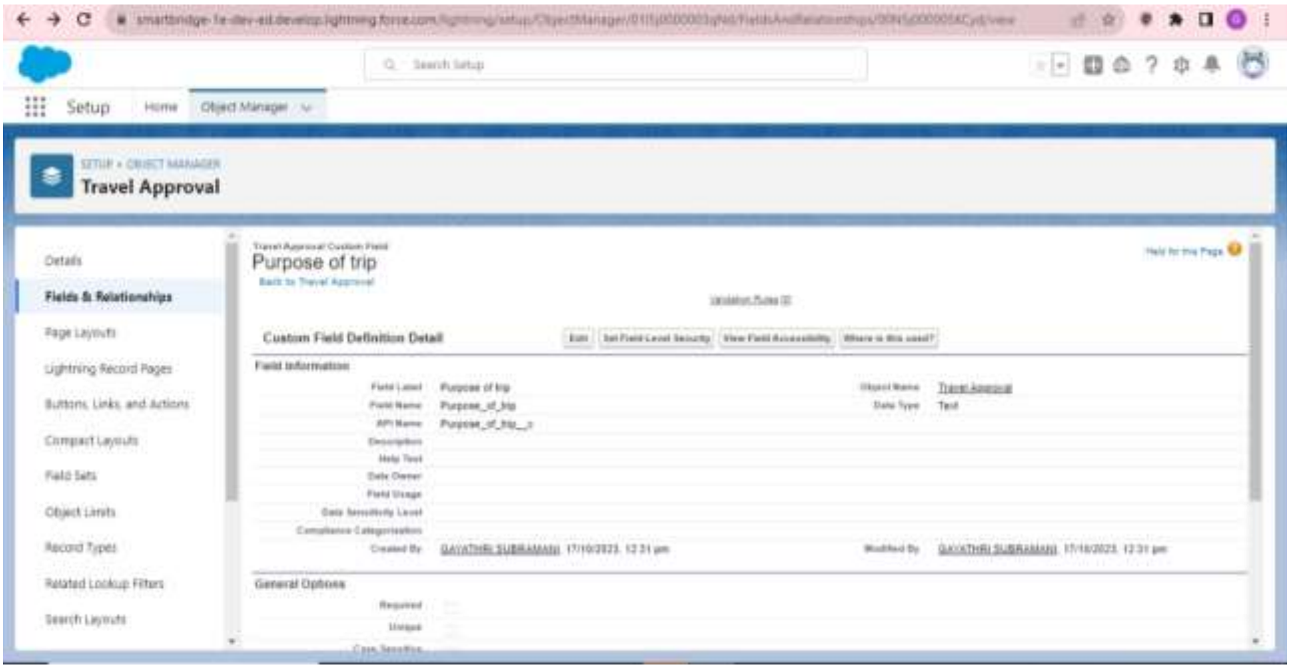
Approval Processes
Travel Approval Request
Travel_Approval_Request
Specify Entry Criteria
Travel Approval: Total Expenses
greater than
Select Approver
Manager

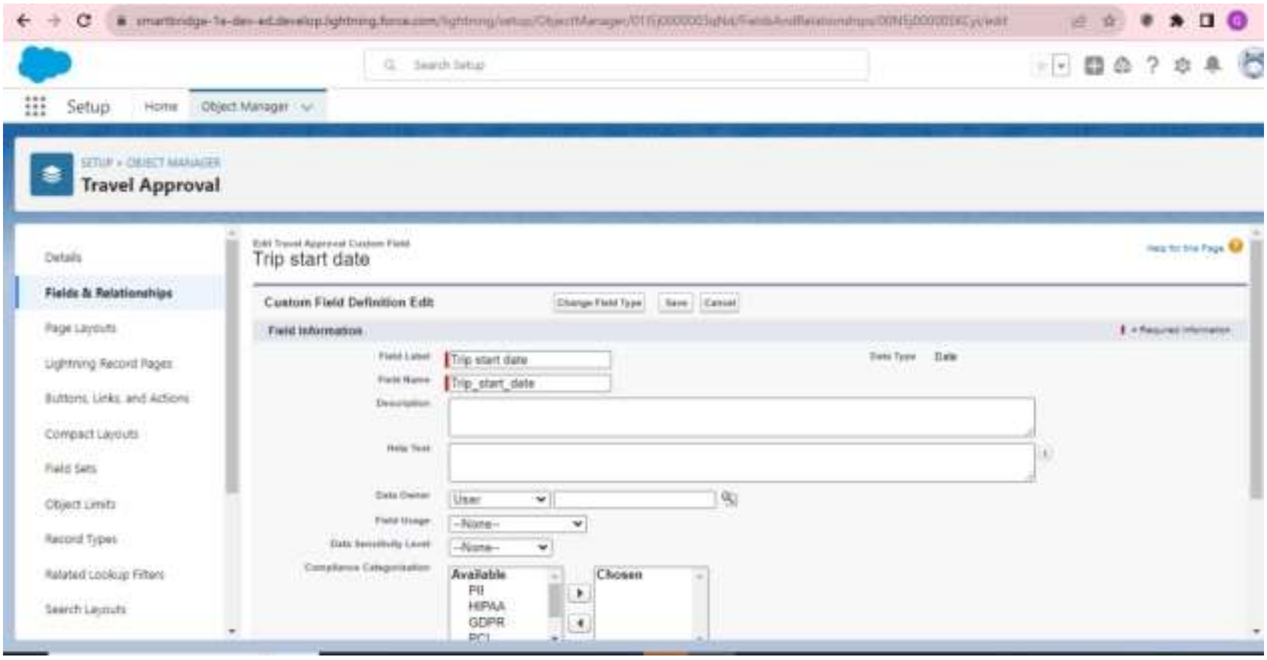

Setup
Approval Processes
Step 1. Enter Name and Description
Travel Coordinator Approval
Travel_Coordinator_Approval

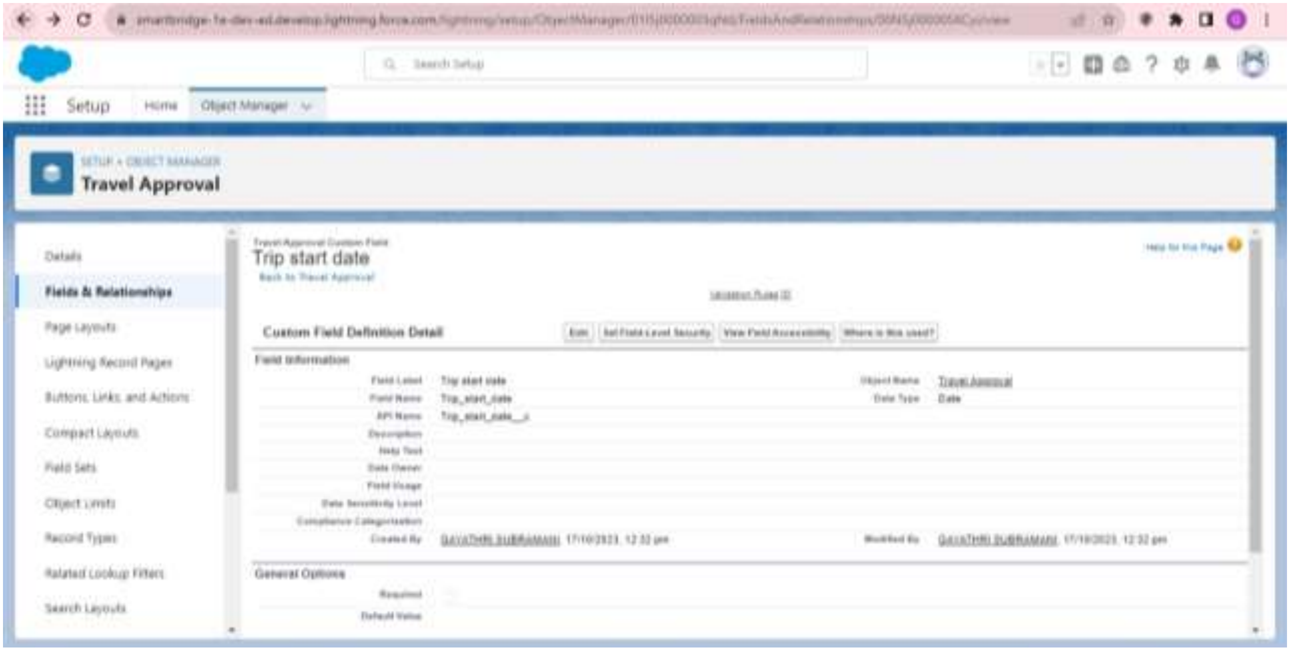

Setup
Travel Approval
Destination state
Fields & Relationships
Custom Field Definition Edit
Destination state
Destination_state

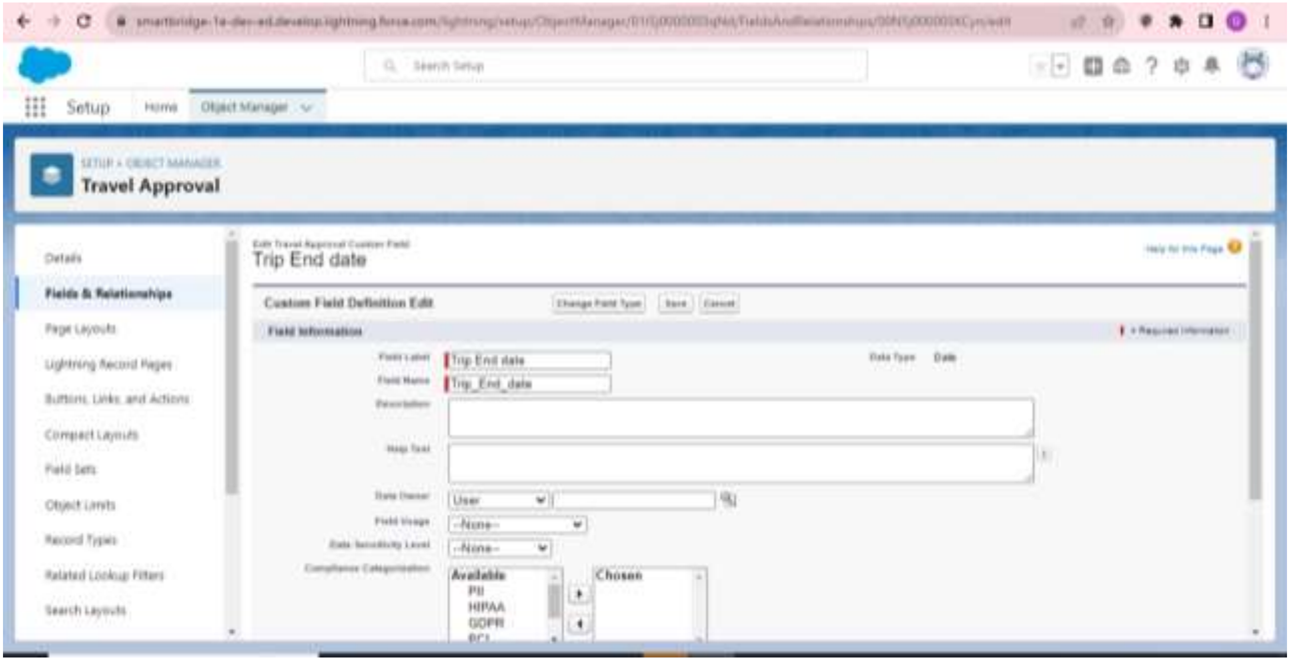

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Travel Approval
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Destination state
Custom Field Definition Detail
Field Information
Destination state
Destination_state
Destination_state__c
General Options

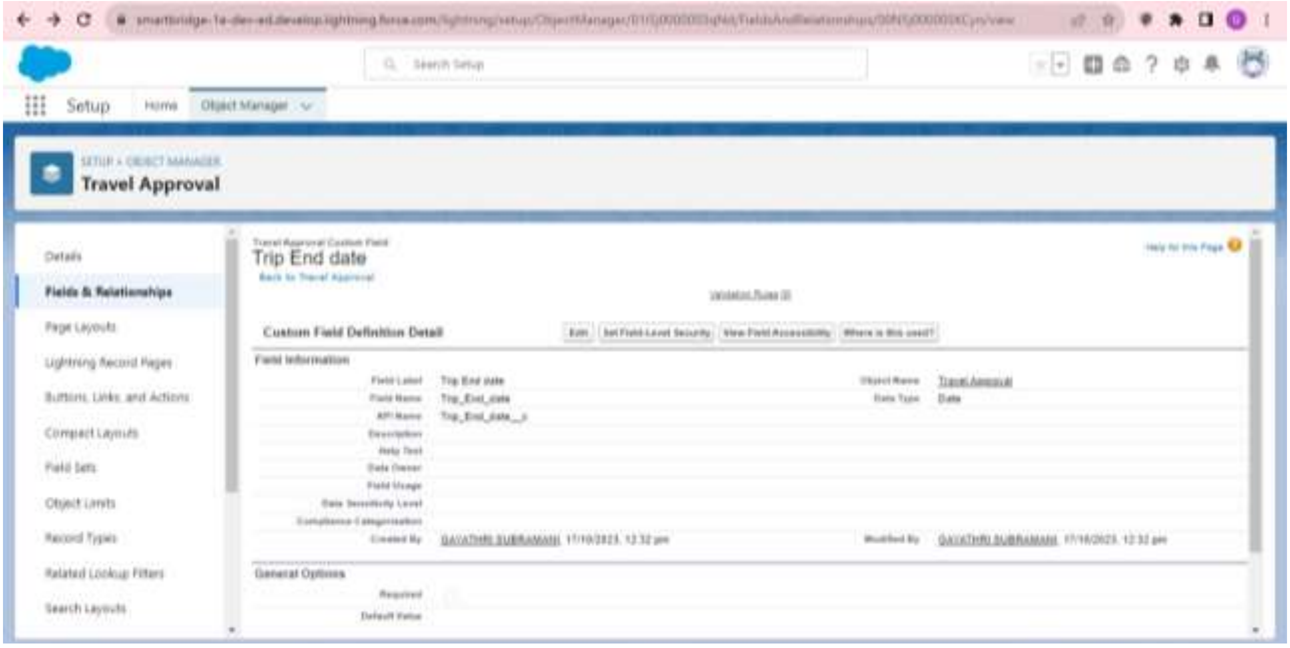

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Travel Approval
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Purpose of trip
Custom Field Definition Edit
Field Information
Purpose of trip
Purpose_of_trip
User
--None--
Available
PII
HIPAA
GDPR
Chosen






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
Trip start date
Custom Field Definition Detail
Field Information
General Options


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
Trip End date
Custom Field Definition Edit
Field Information
Trip End date
Trip_End_date
Date
User
--None--
Available
PII
HIPAA
GDPR
Chosen


Setup
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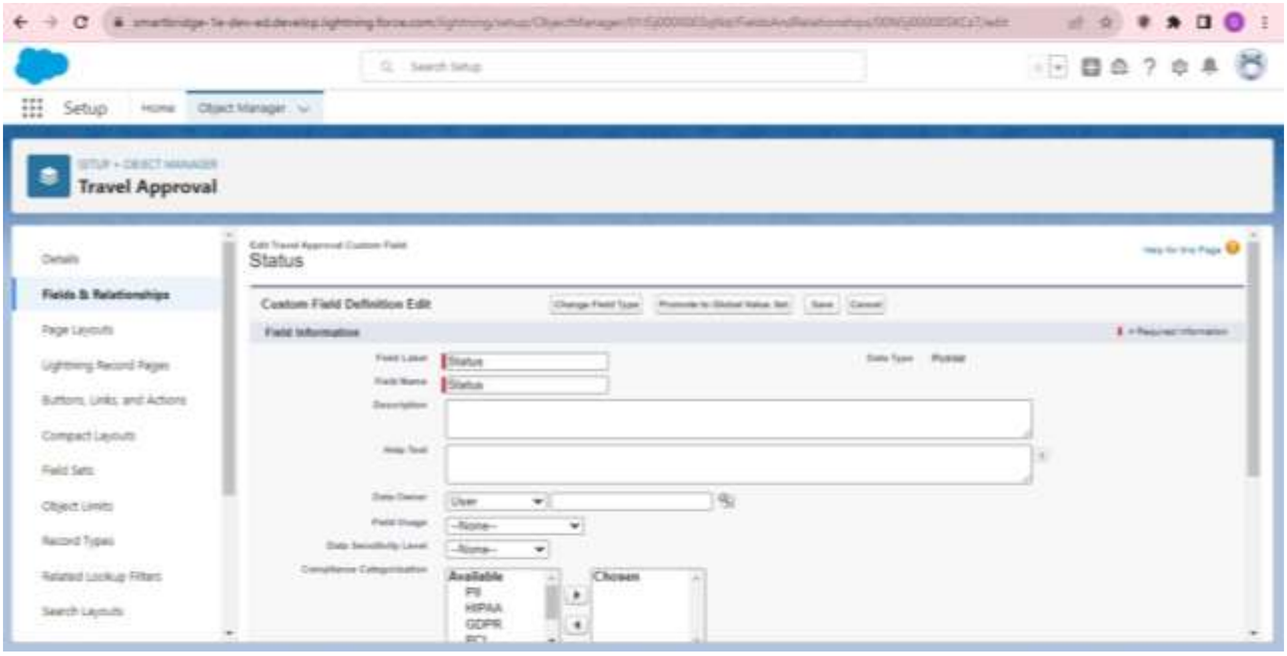
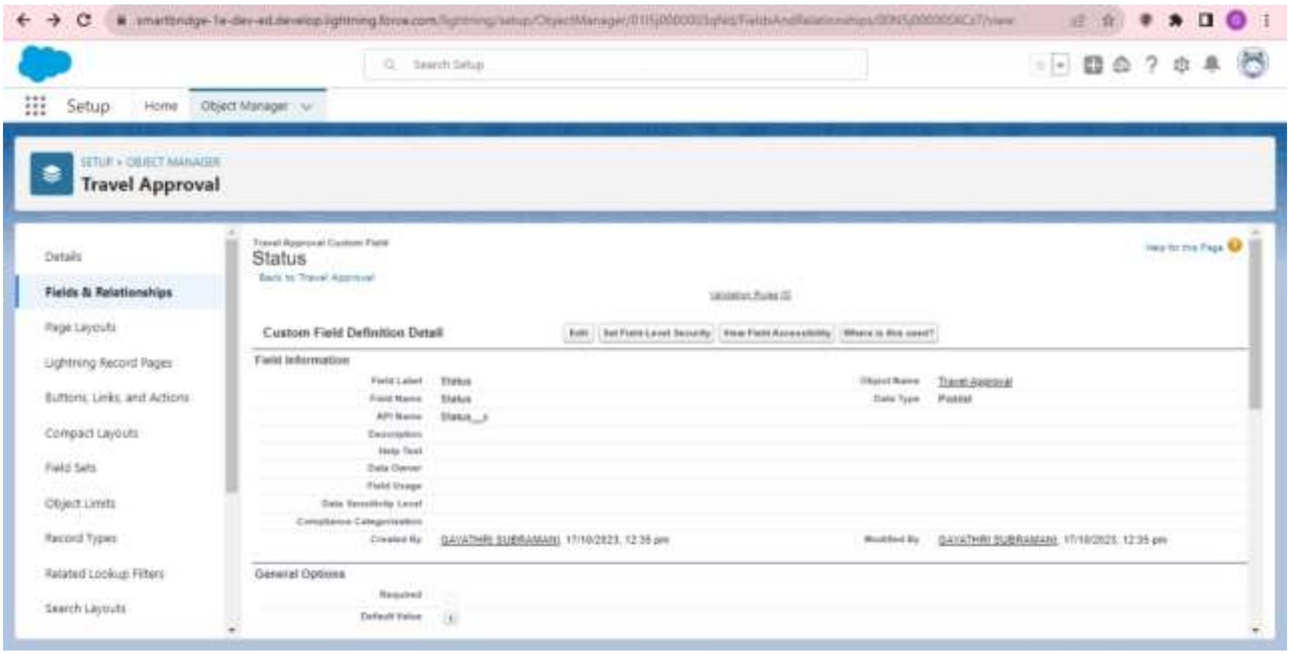
Object Manager
SETUP > OBJECT MANAGER
Travel Approval
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Travel Approval Custom Field
Trip End date
Back to Travel Approval
Custom Field Definition Detail
Field Information
Field Label Trip End date
Field Name Trip_End_date
API Name Trip_End_date__c
Object Name Travel Approval
Data Type Date
General Options
Required
Default Value


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
Field Information
Field Label Status
Field Name Status
Data Type Picklist
Description
Help Text
Data Owner User
Field Usage --None--
Data Sensitivity Level --None--
Compliance Categorization
Available
PII
HIPAA
GDPR
Chosen


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
Status
Back to Travel Approval
Custom Field Definition Detail
Field Information
Field Label Status
Field Name Status
API Name Status__c
Object Name Travel Approval
Data Type Picklist
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By GAYATHRI SUBRAMANI, 17/10/2023, 12:35 pm
Modified By GAYATHRI SUBRAMANI, 17/10/2023, 12:35 pm
General Options
Required
Default Value

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."

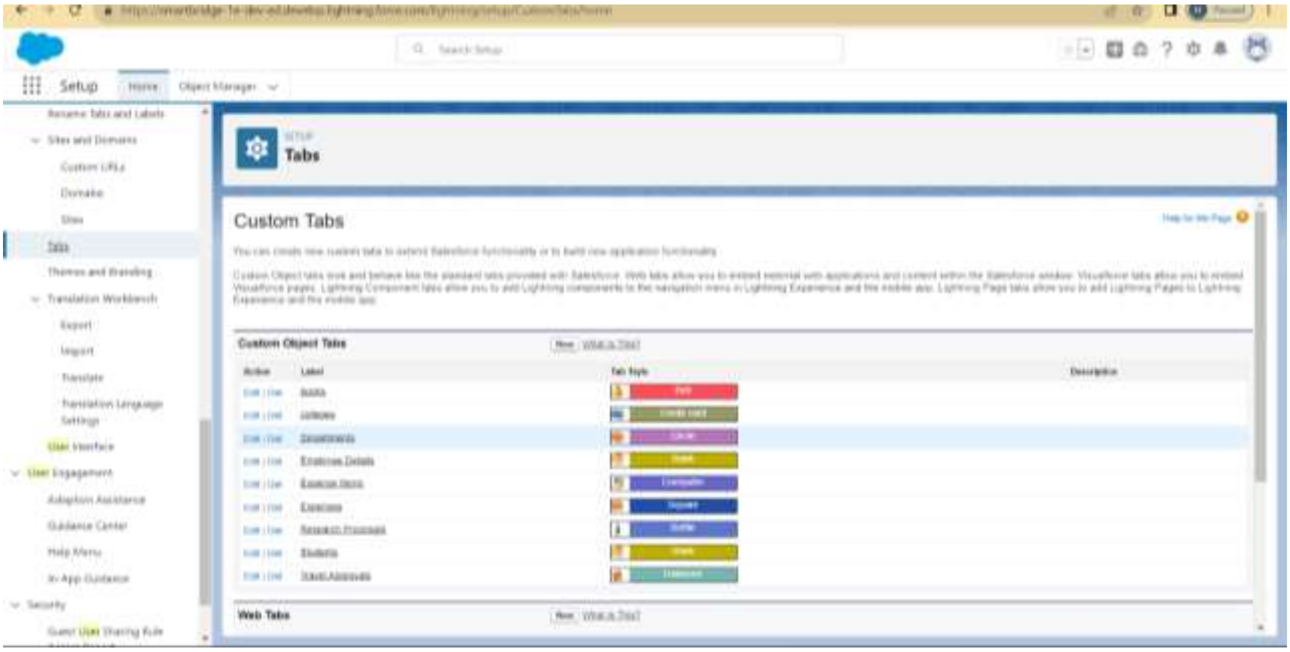
Step 6: Configure tab appearance, accessibility, and styling.

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."

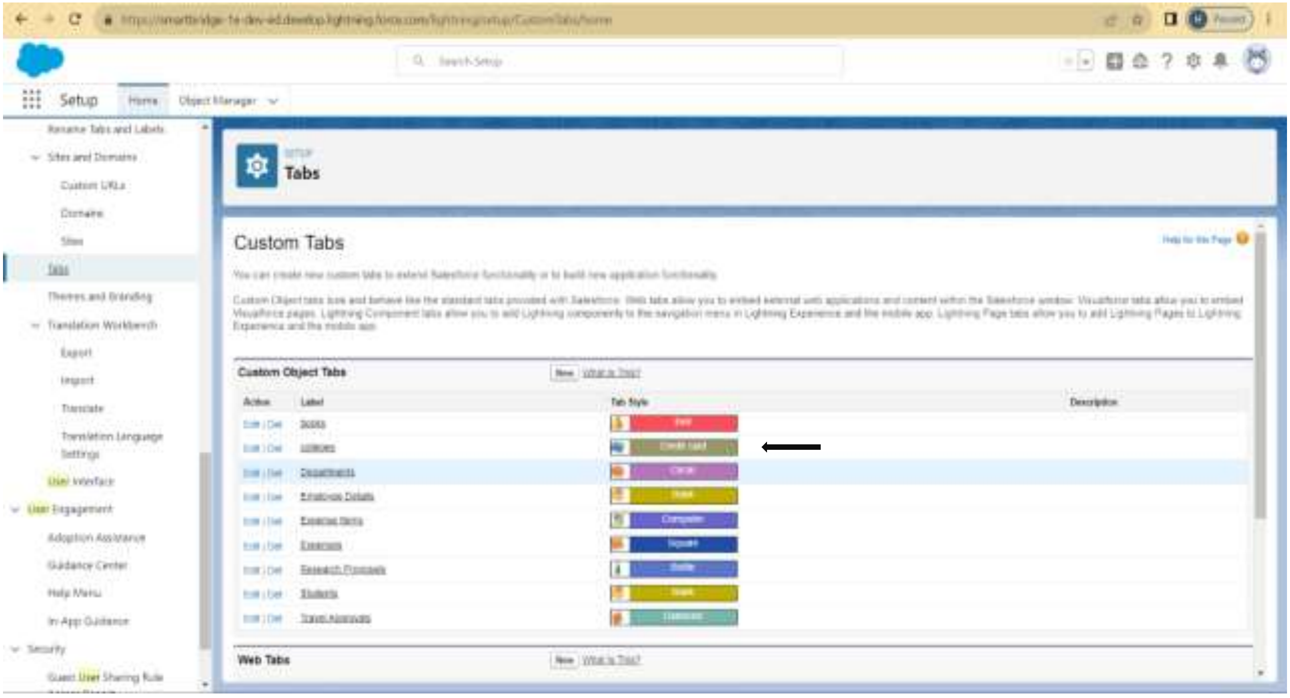
Step 6: Click "New Custom Object Tab."

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.



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."

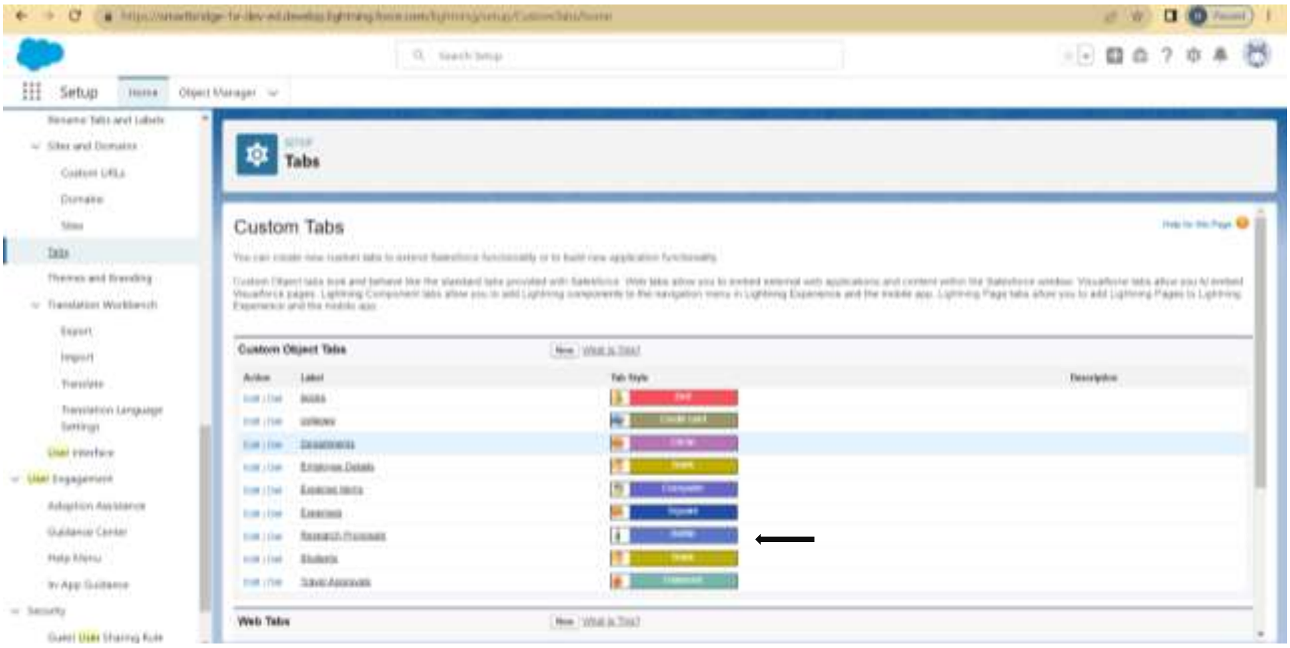
Step 4: Click on the "New Custom Object Tab" button.

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:

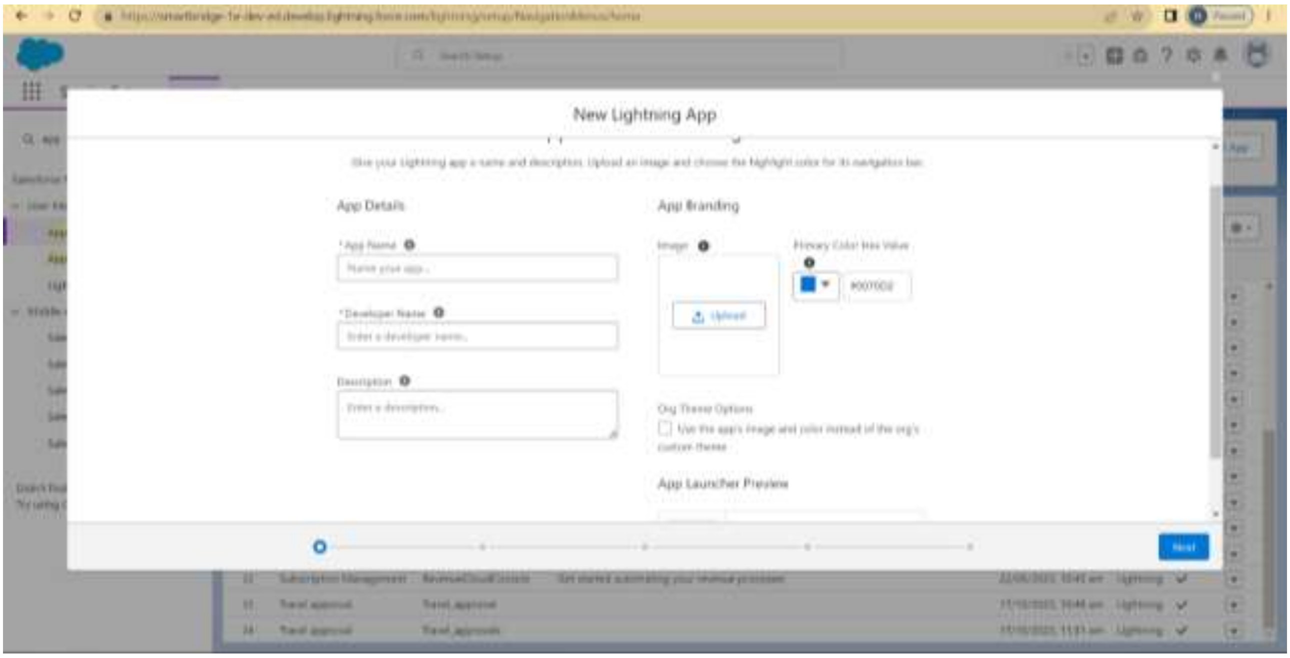
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

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.

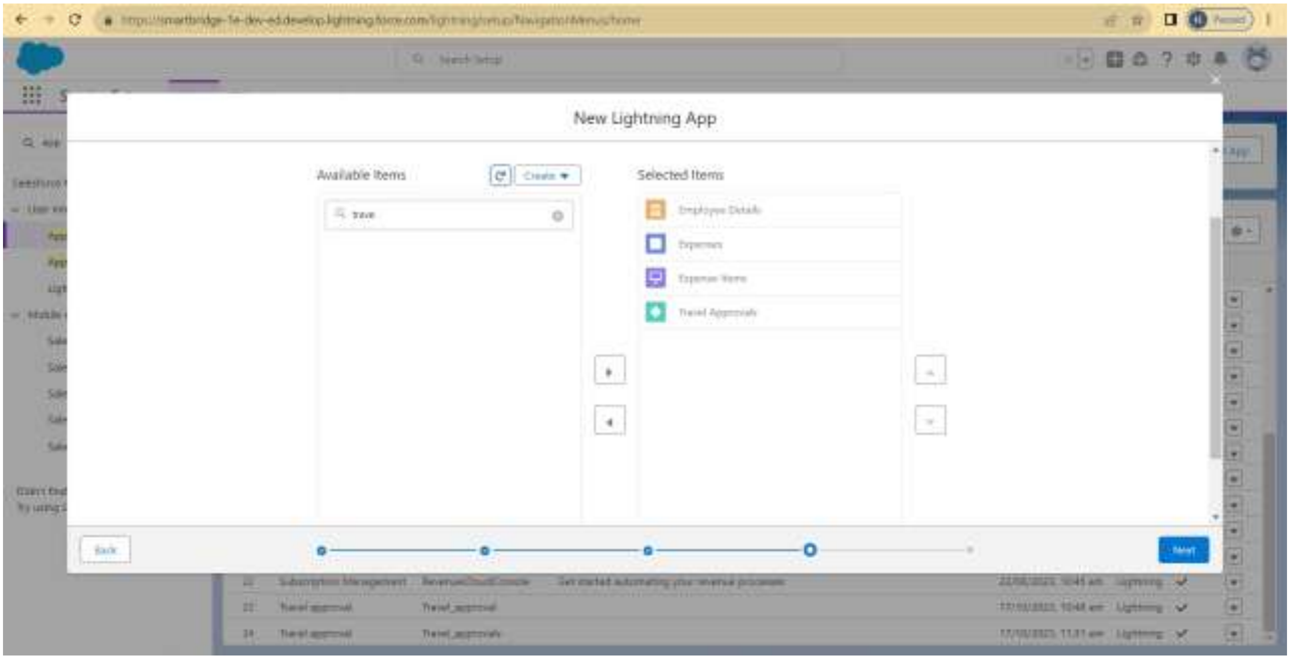
1.Click New Lightning App. Travel approval application as the App Name, then click Next



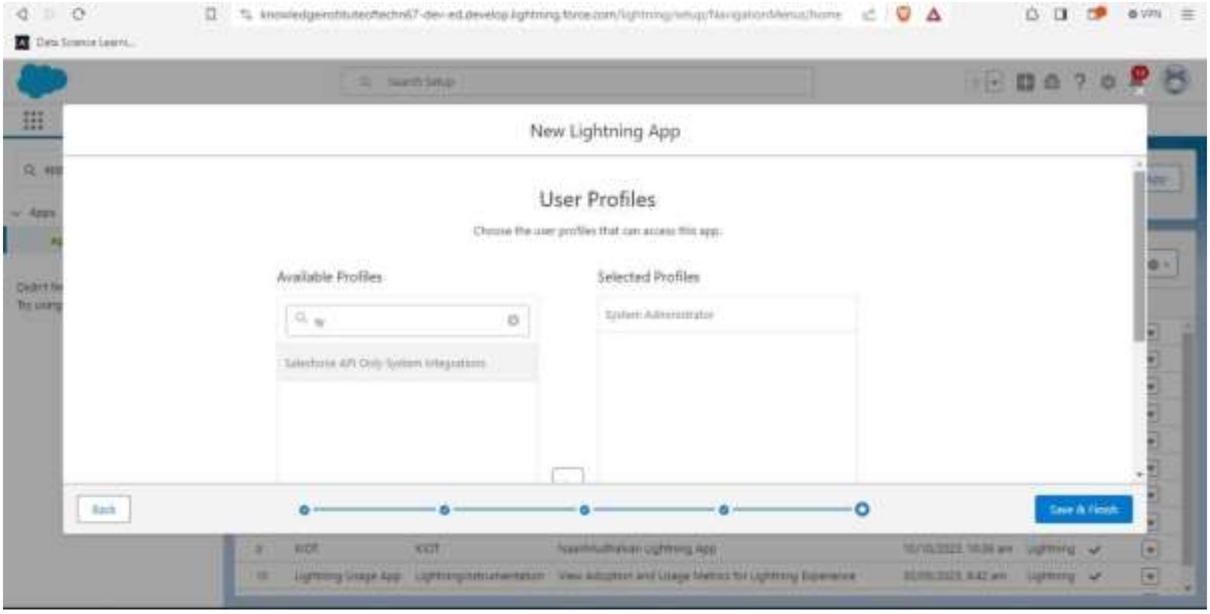
2.Under App Options, leave the default selections and click Next.

3.Under Utility Items, leave as is and click Next.

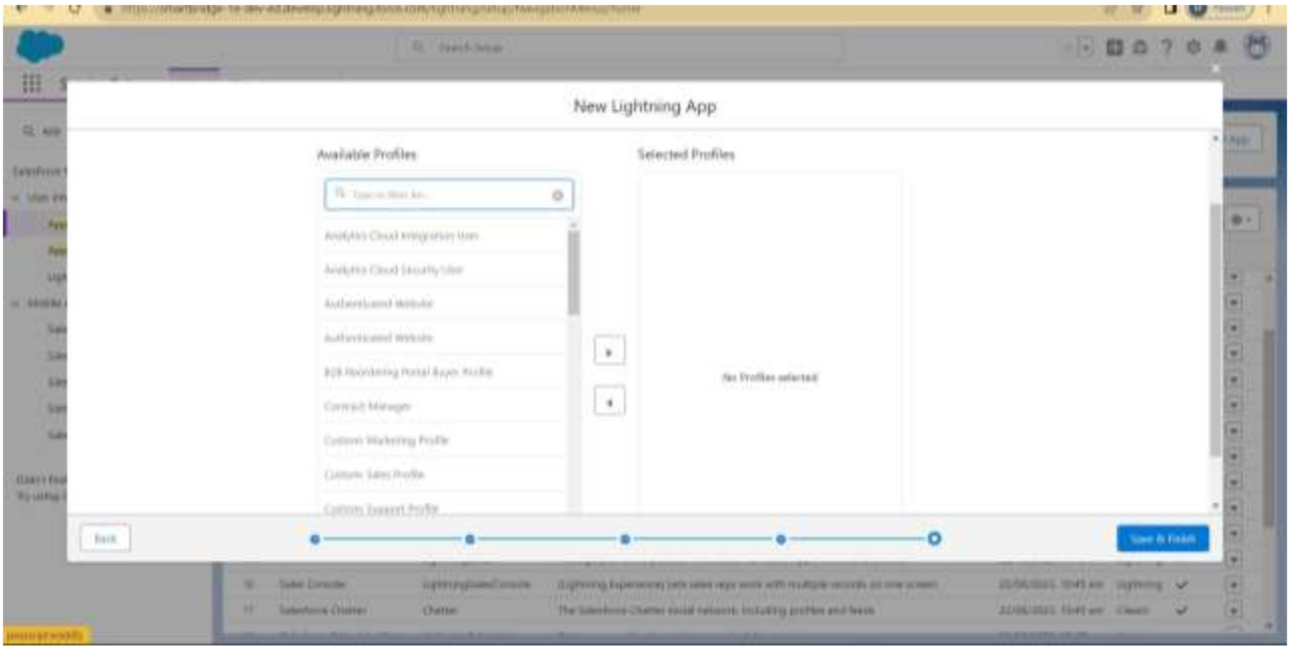
4.From Available Items, select Employee Details, Expense, Expense Items, Travel Approvals and Dashboards and move them to Selected Items. Click Next.



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:

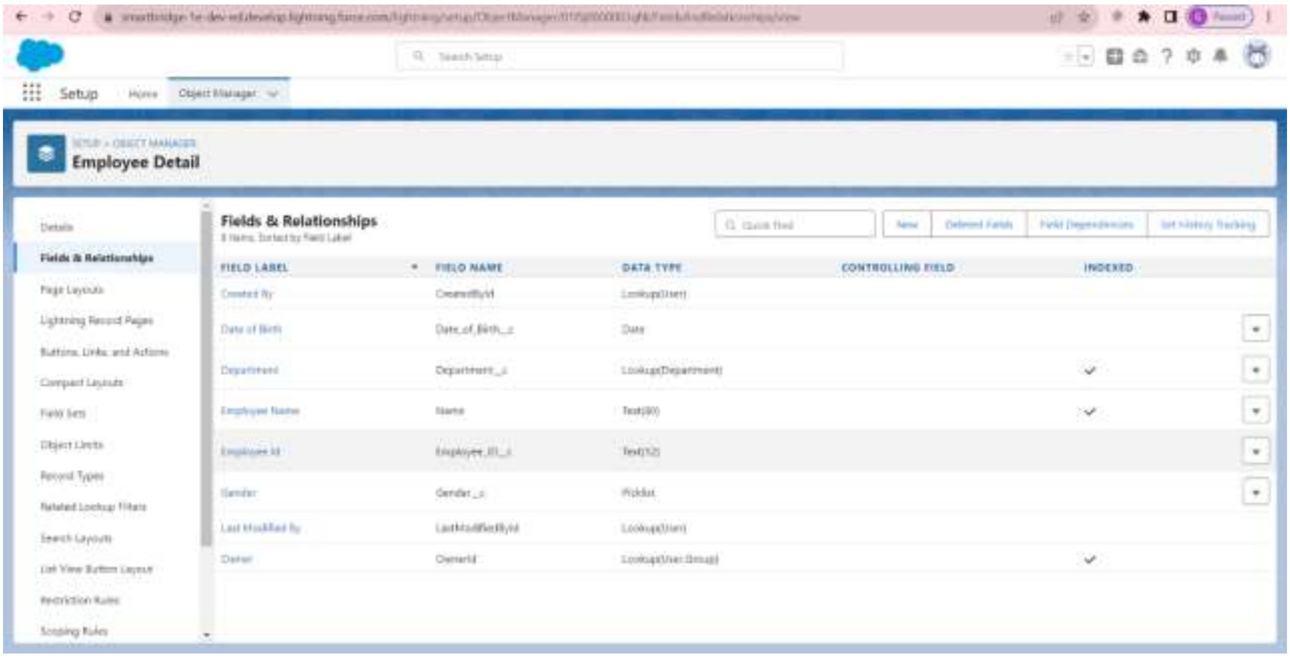
Fields in Salesforce represent what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

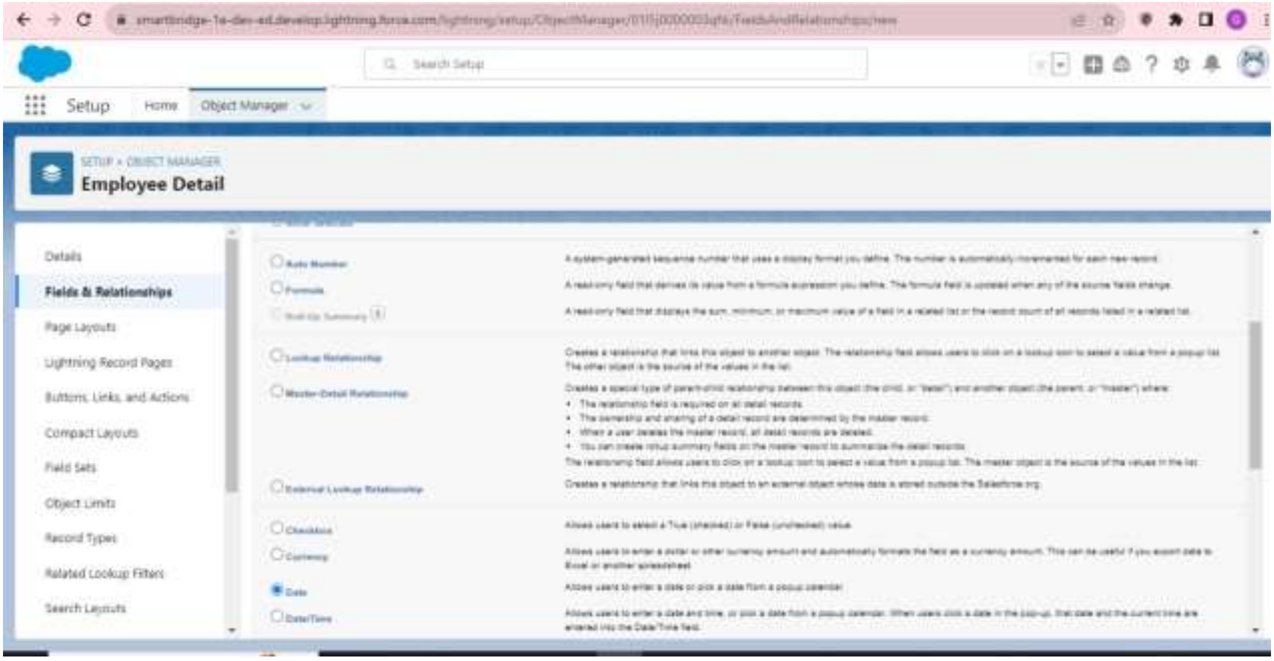
There are 2 types of fields in salesforce:

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.

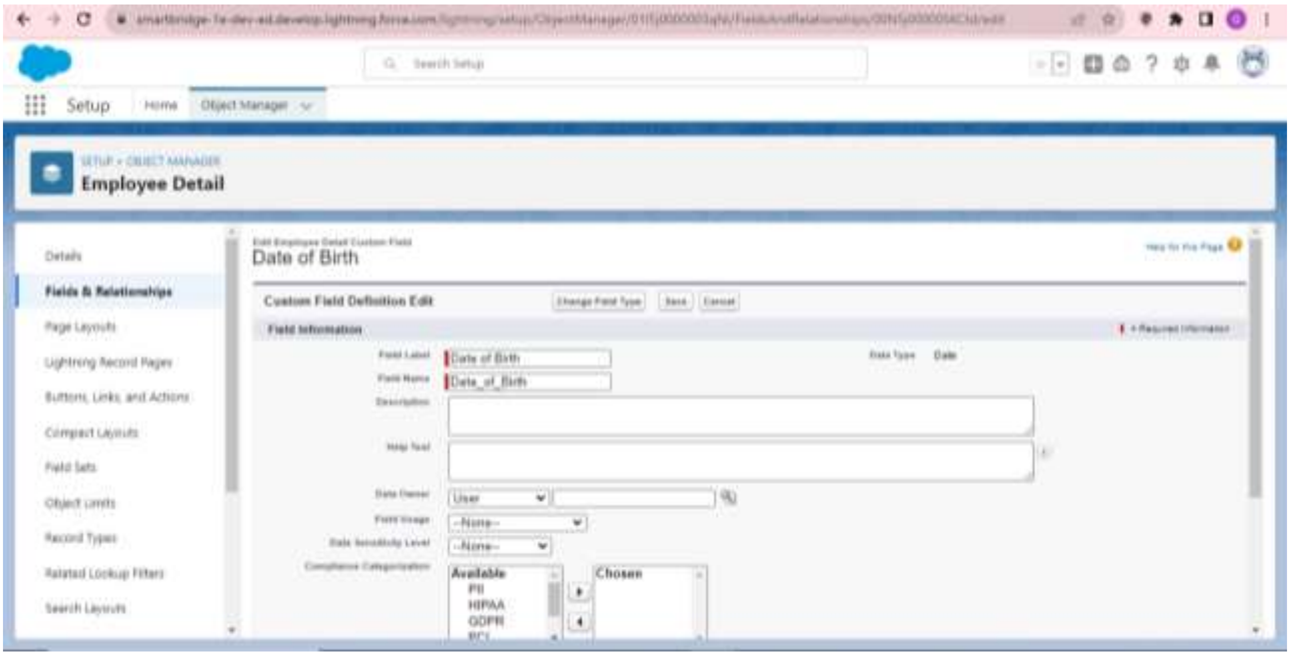
Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

1)Creation of Fields for Employee Details Objects



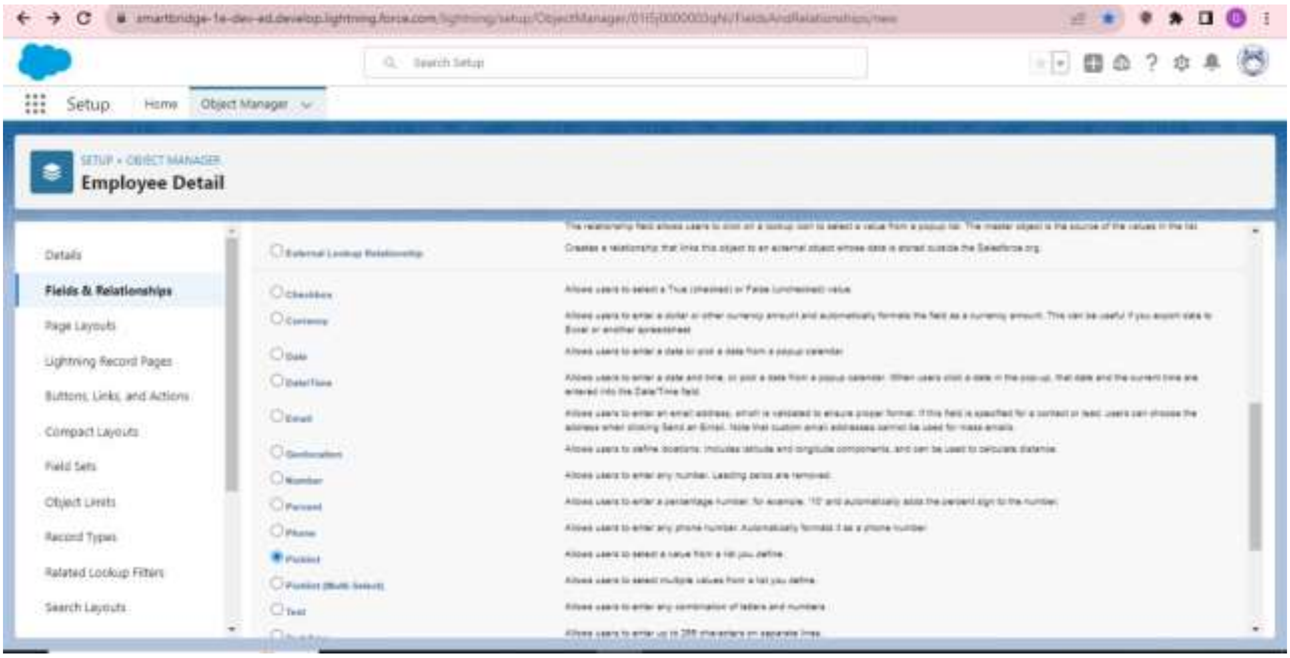


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee Detail
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

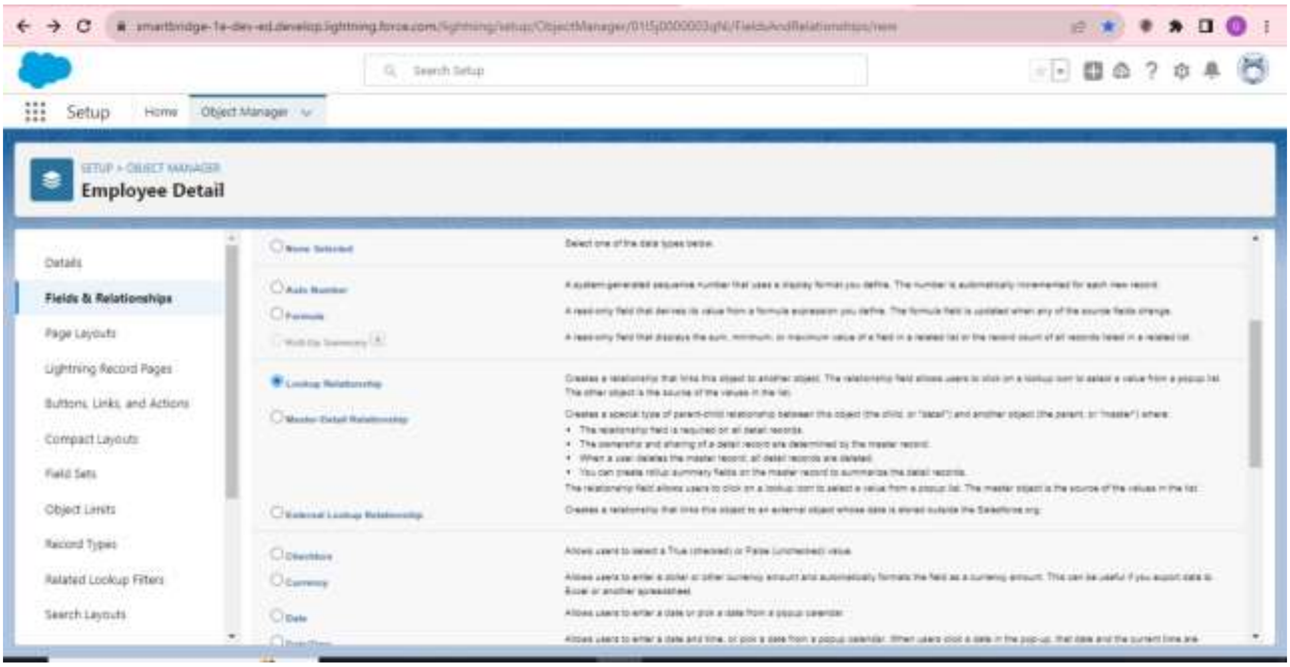


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Employee Detail
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Date of Birth
Custom Field Definition Edit
Field Information
Date of Birth
Date_of_Birth
User
--None--
Available
Chosen
PII
HIPAA
GDPR

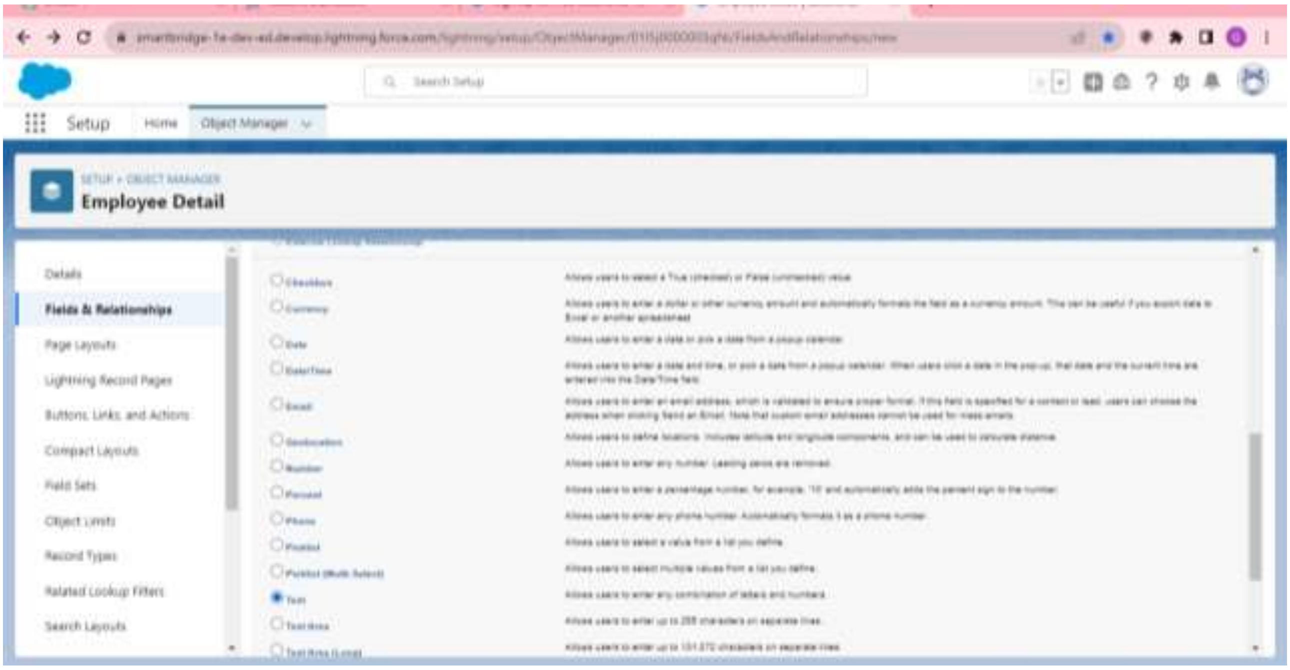
2)Picklist for Gender



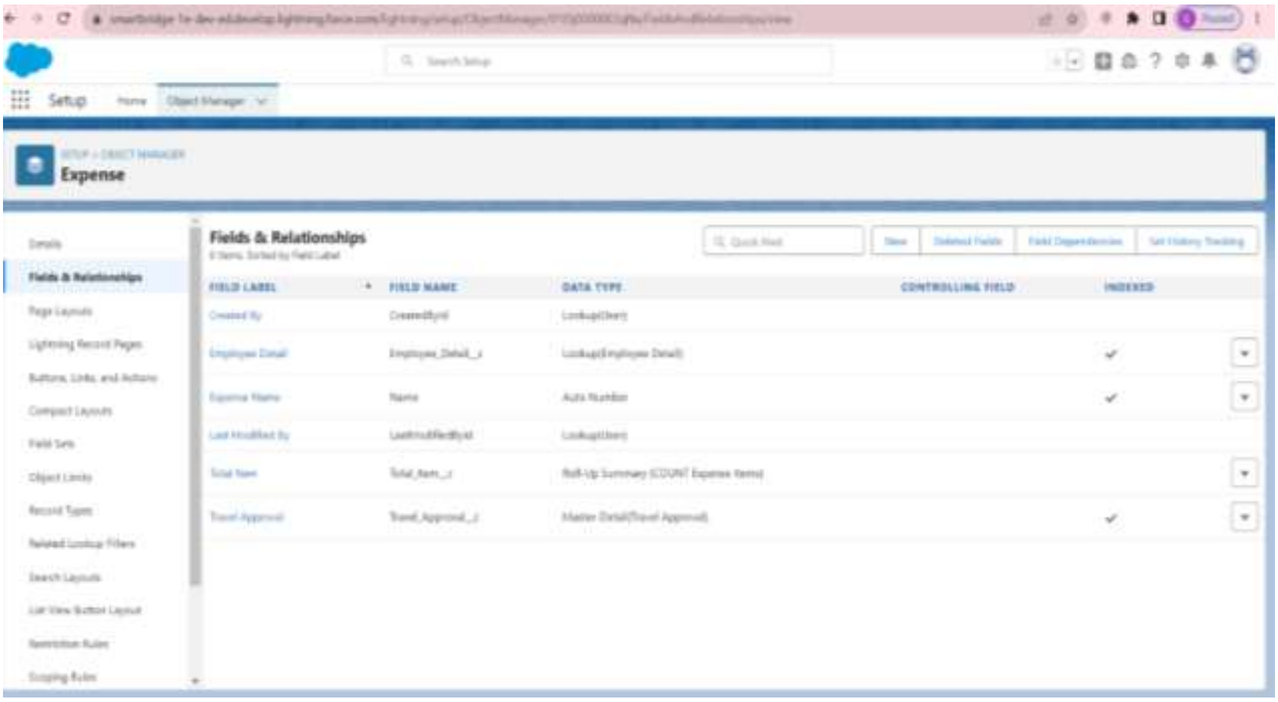
3)Lookup Relationship



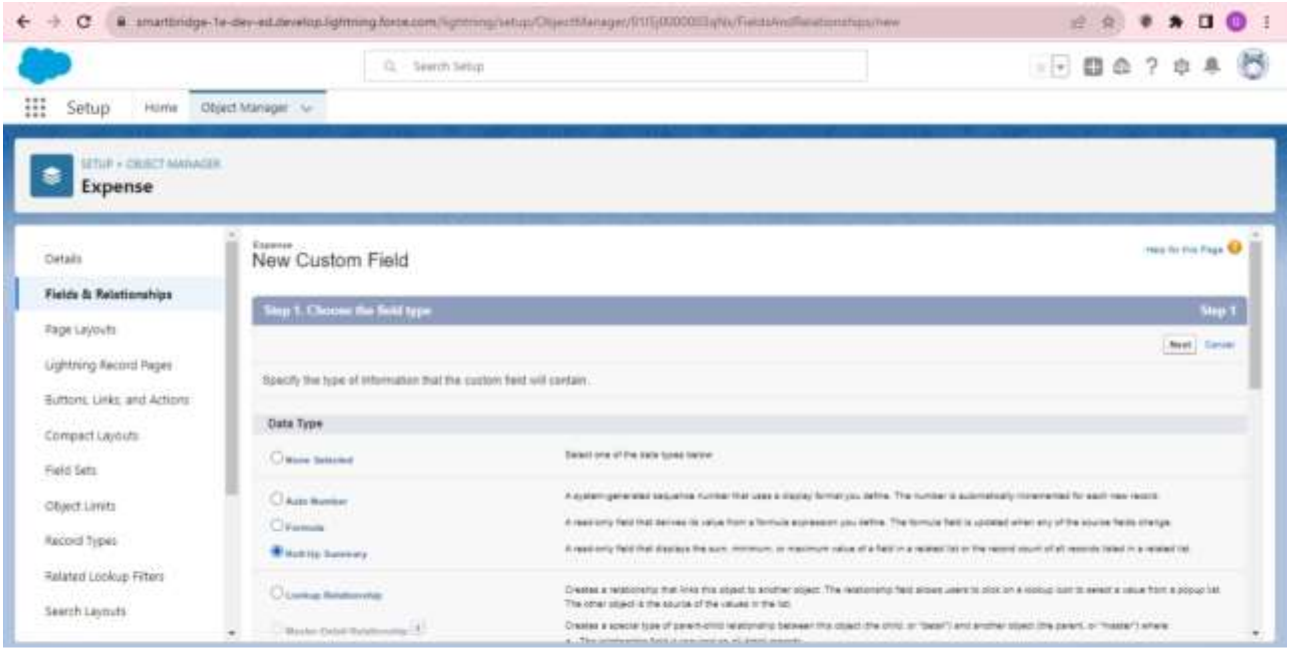
4)Text



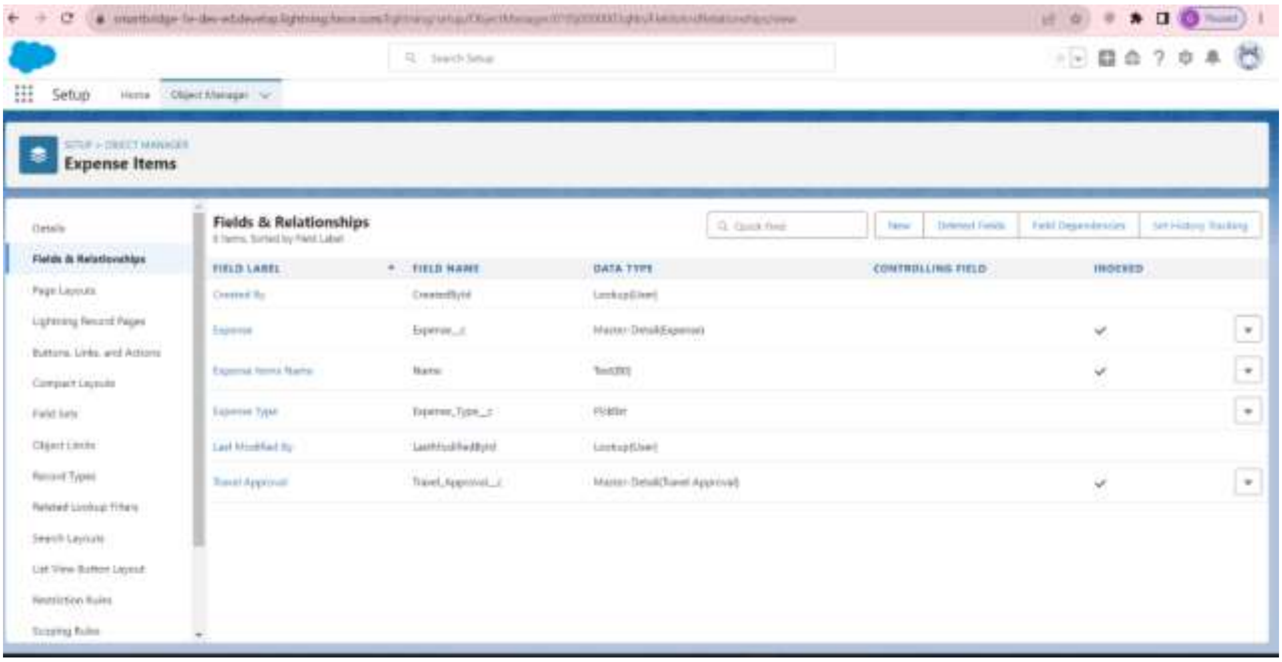
5)Creation of Fields for Expense



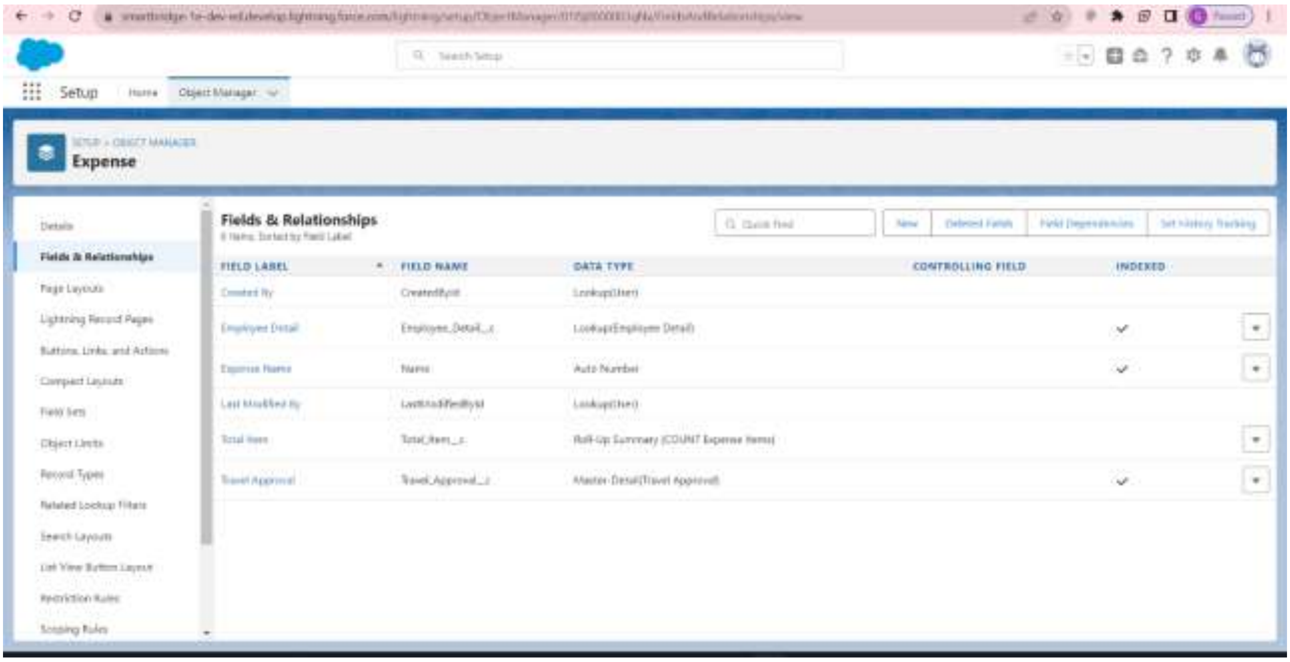
6)Rollup summary



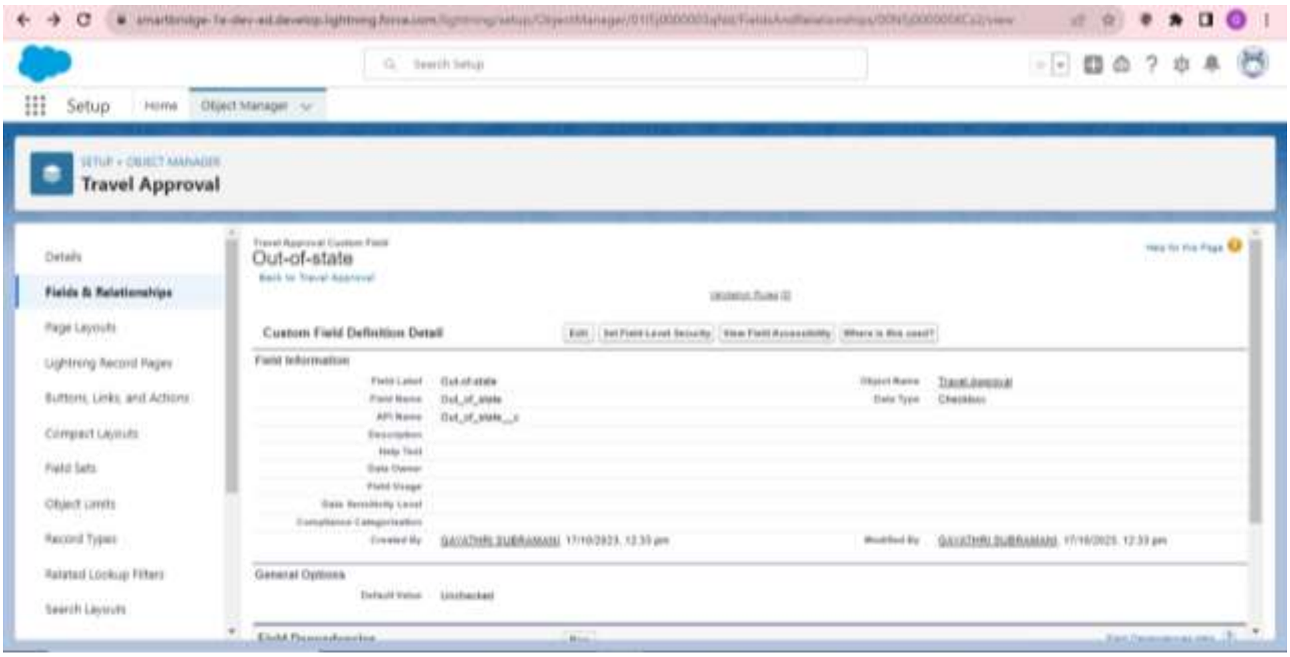
7)Creation of Fields Expense Items

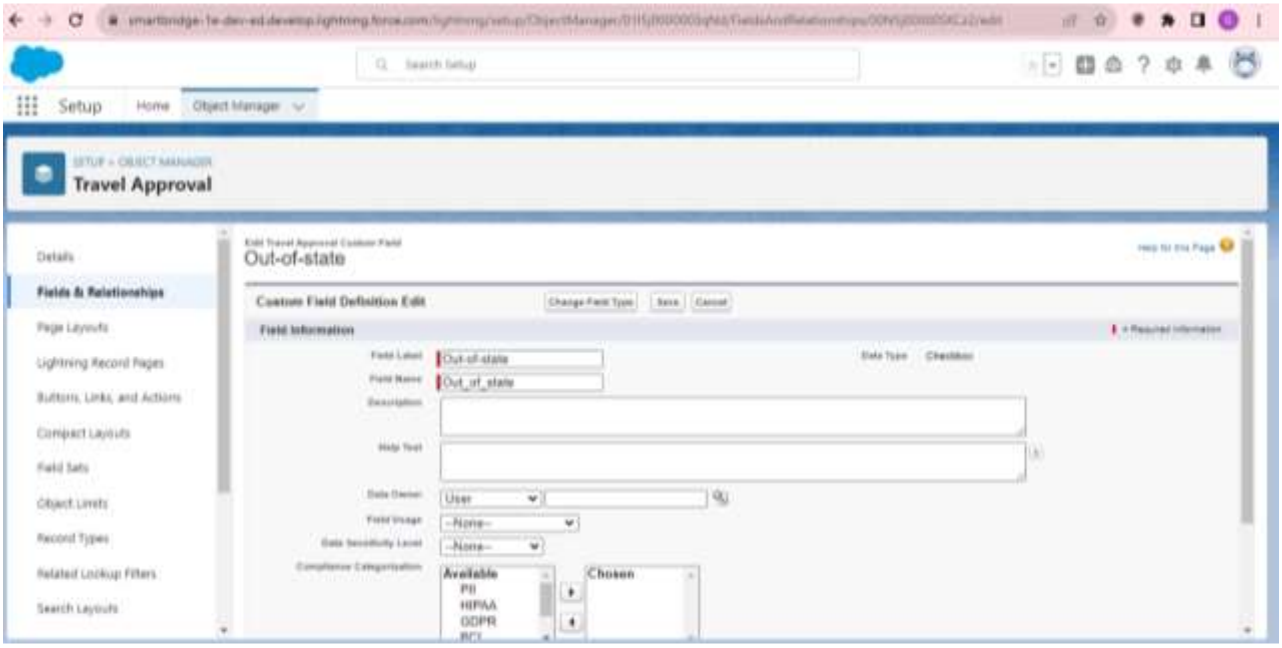


8)Creation of Fields Travel Approval

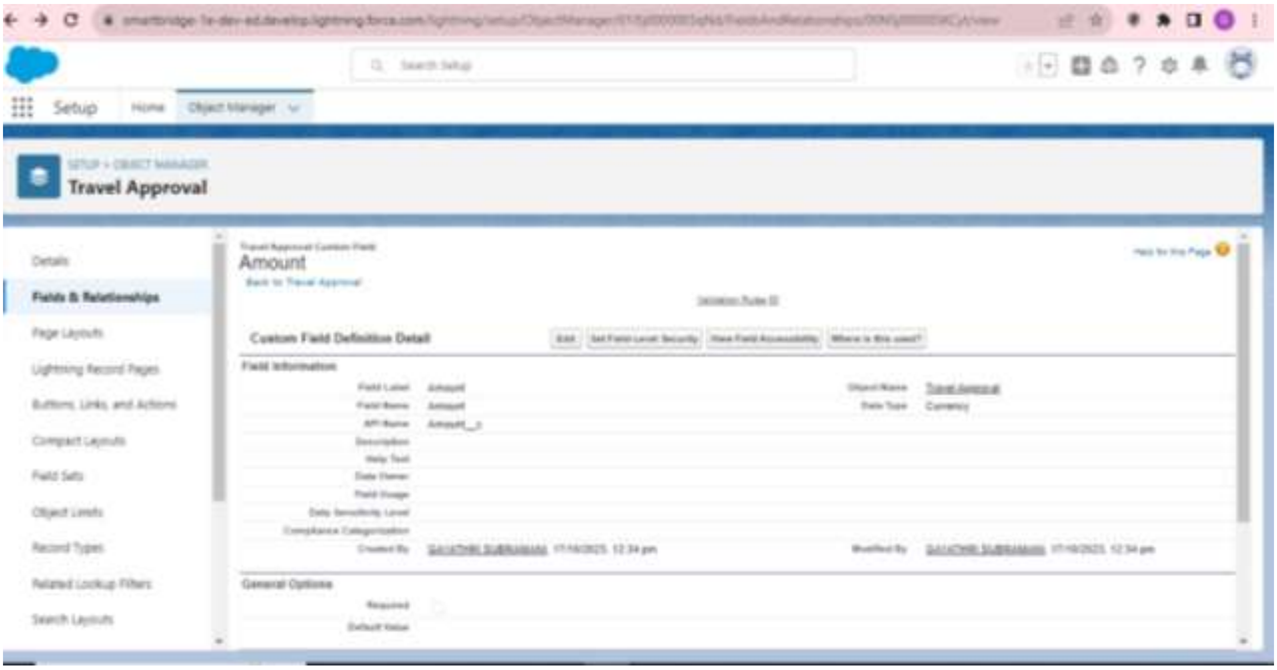


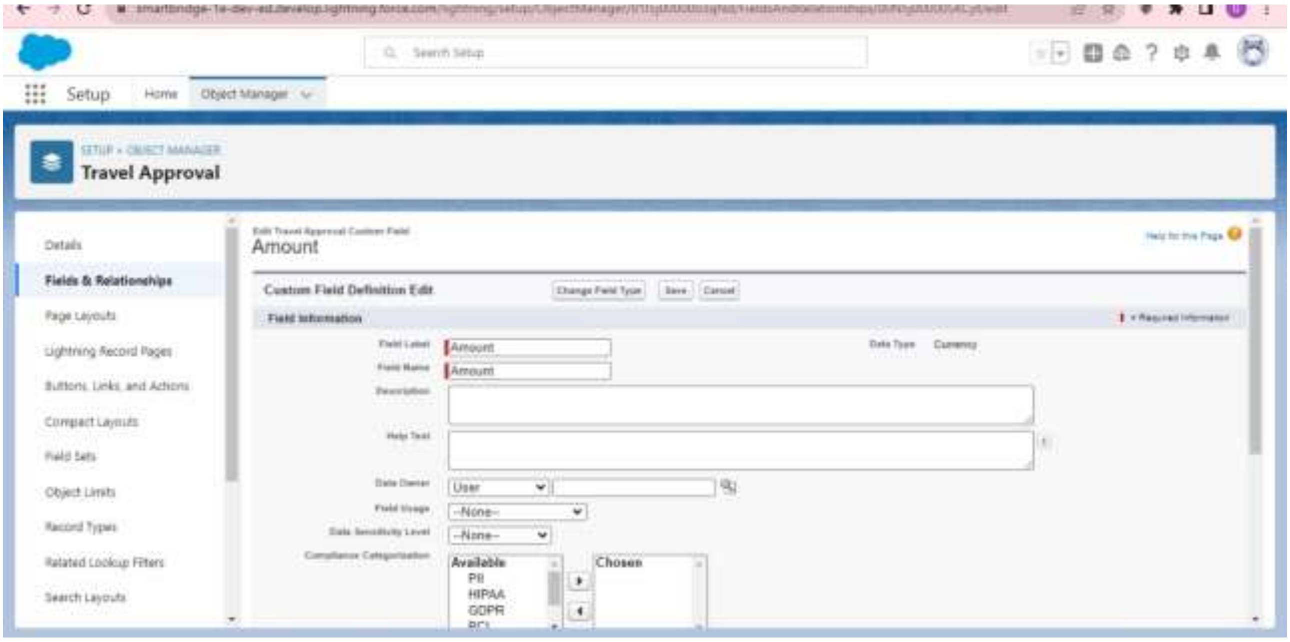
9)Fields for Out-of-State



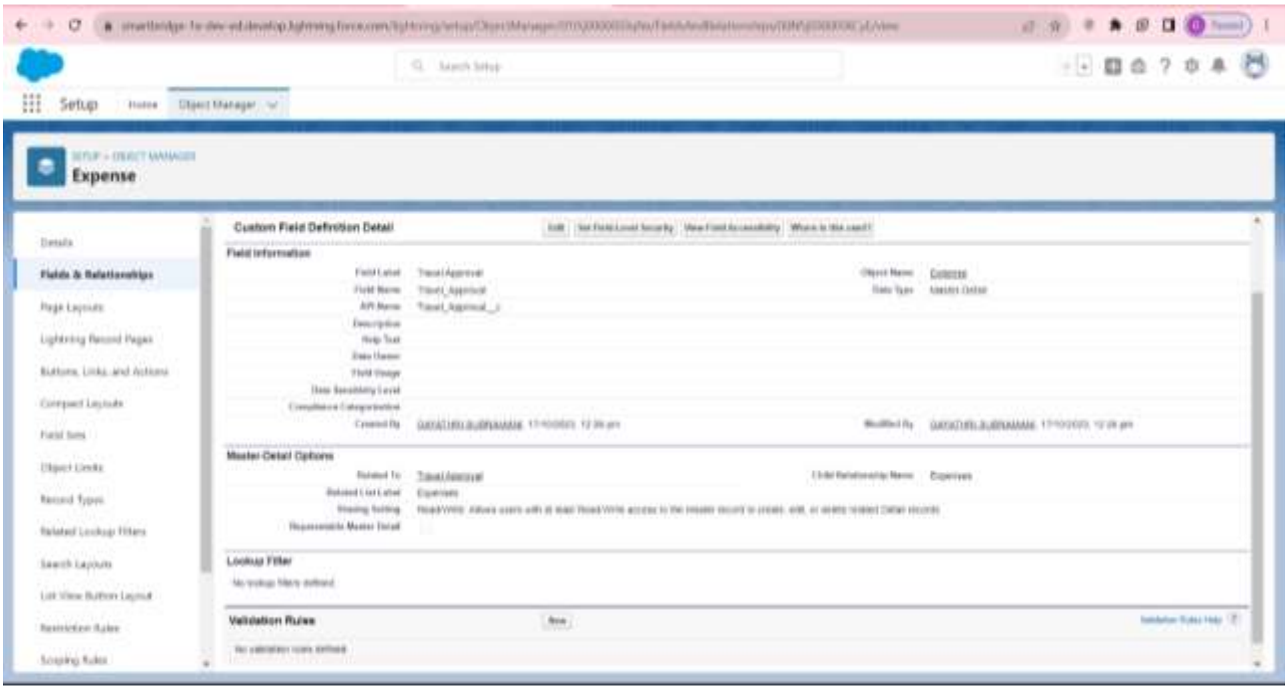


10)Fields for Amount

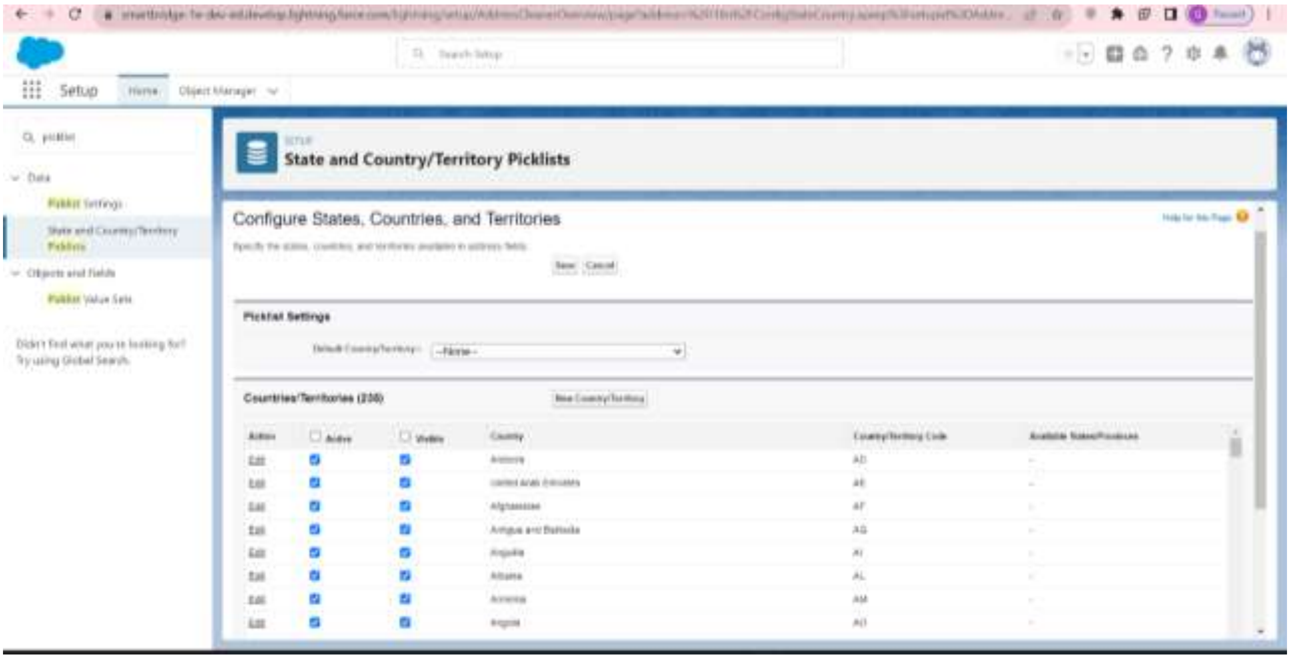




11)Master-Detail for Expense



12)Picklist for state and country/Territory



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

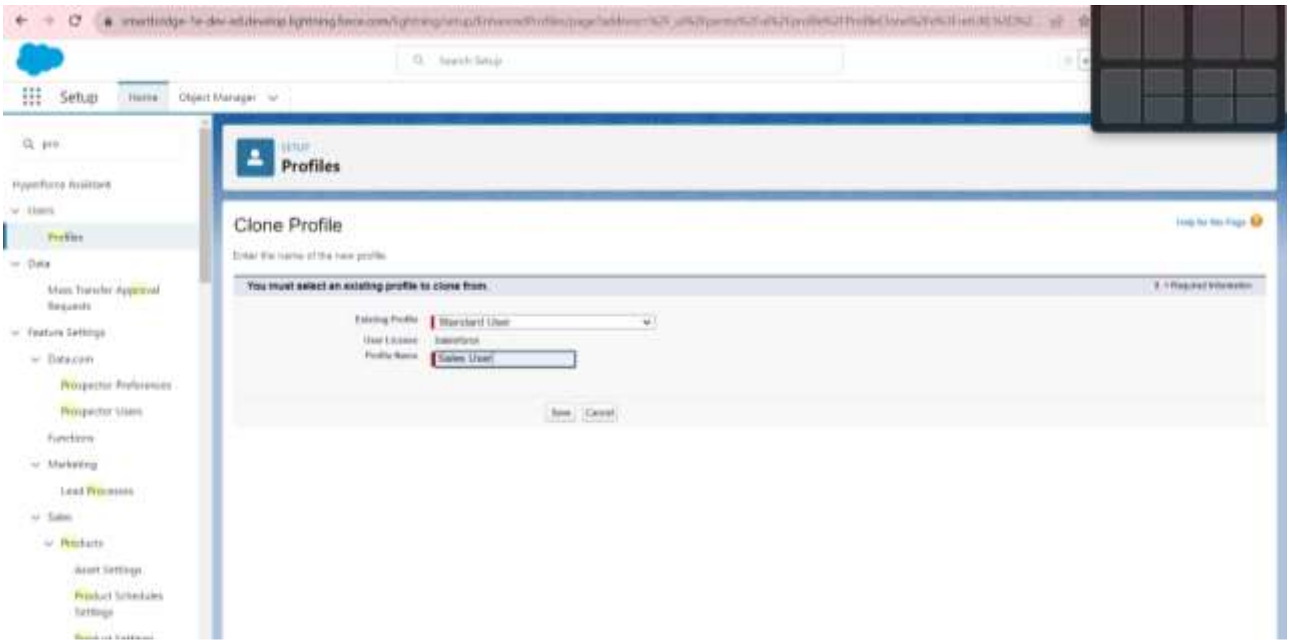
1.From setup, enter profiles in Quick Find box

2.Select profiles (Standard user).

3.Click clone.

4.For Profile, enter Sales user.

5.Click save.



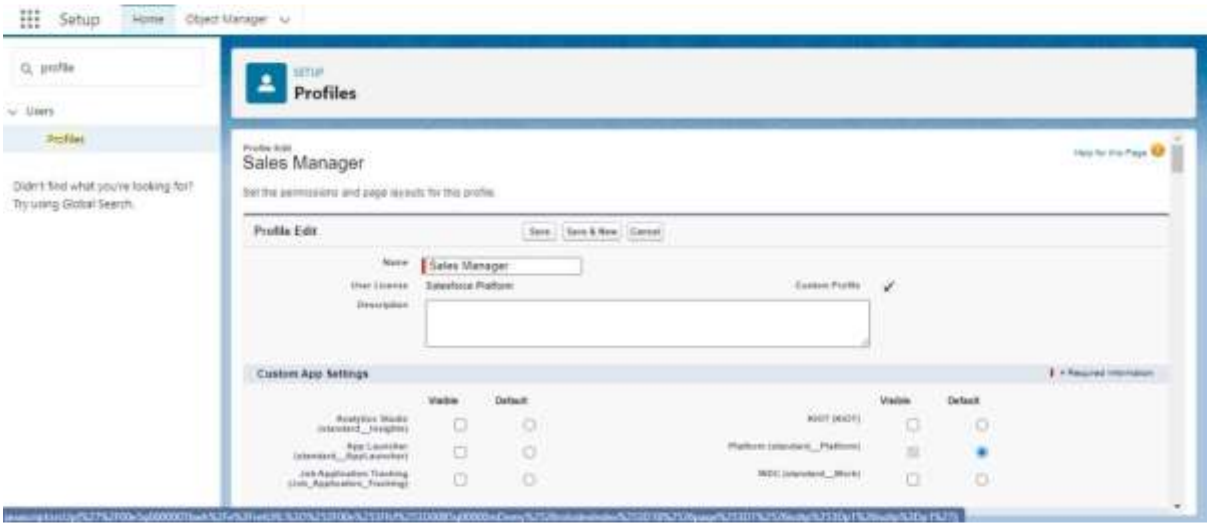
2)Create A Custom Profile-2

1.Create a profile with the profile name as "Sales Manager".

2.From setup, enter profiles in Quick Find box

3.Select profiles (Standard user).

4.Click clone.



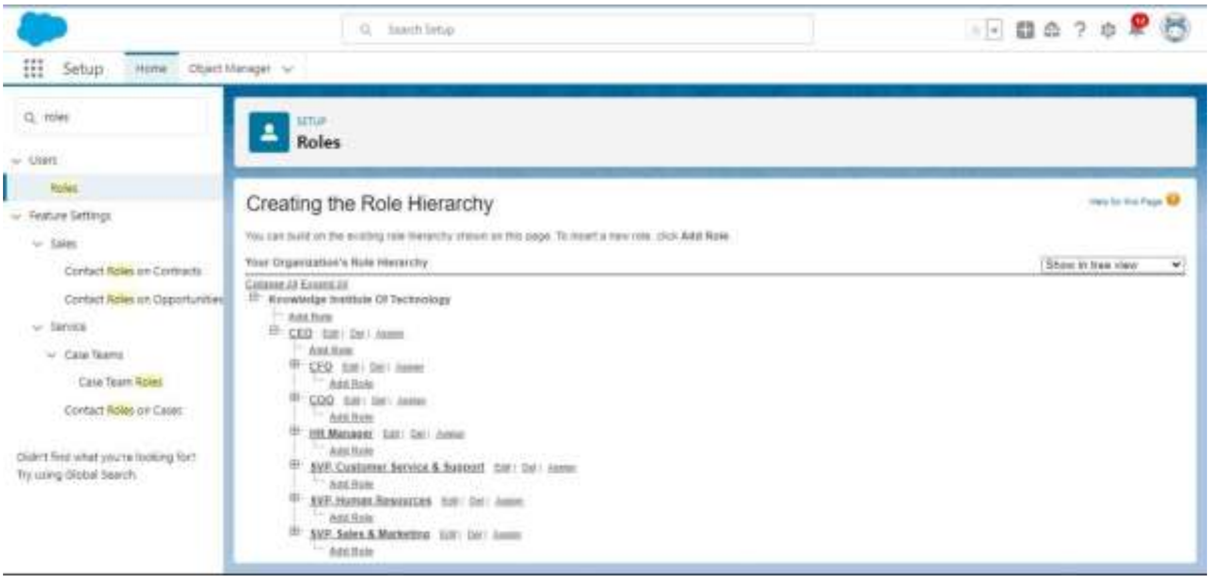
Role

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.

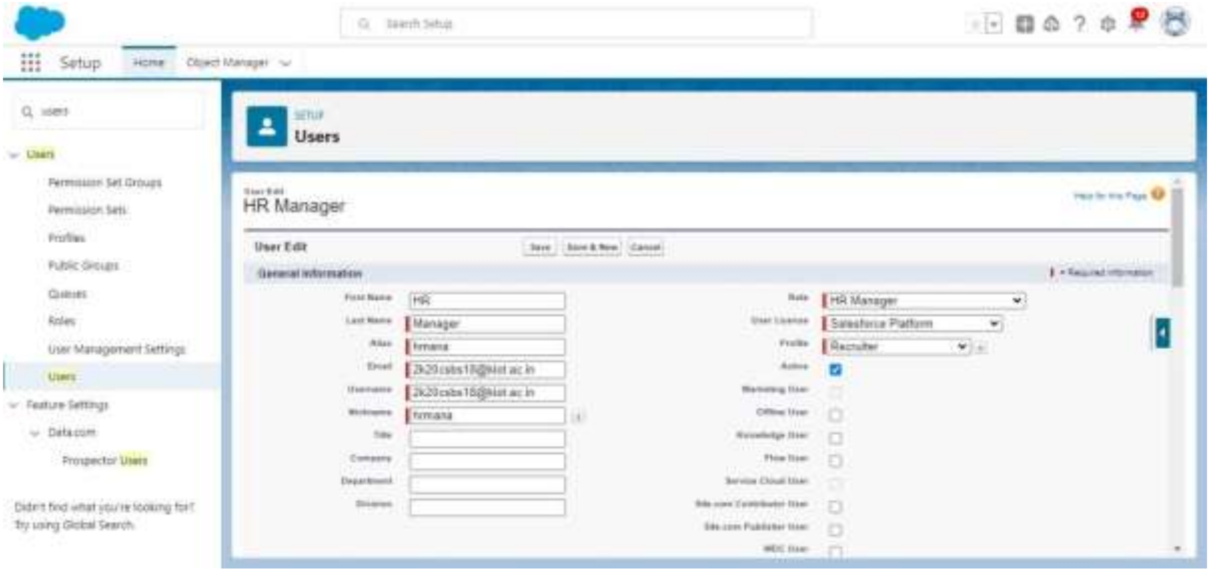
3.Enter First name as HR and last name as Manager.

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.

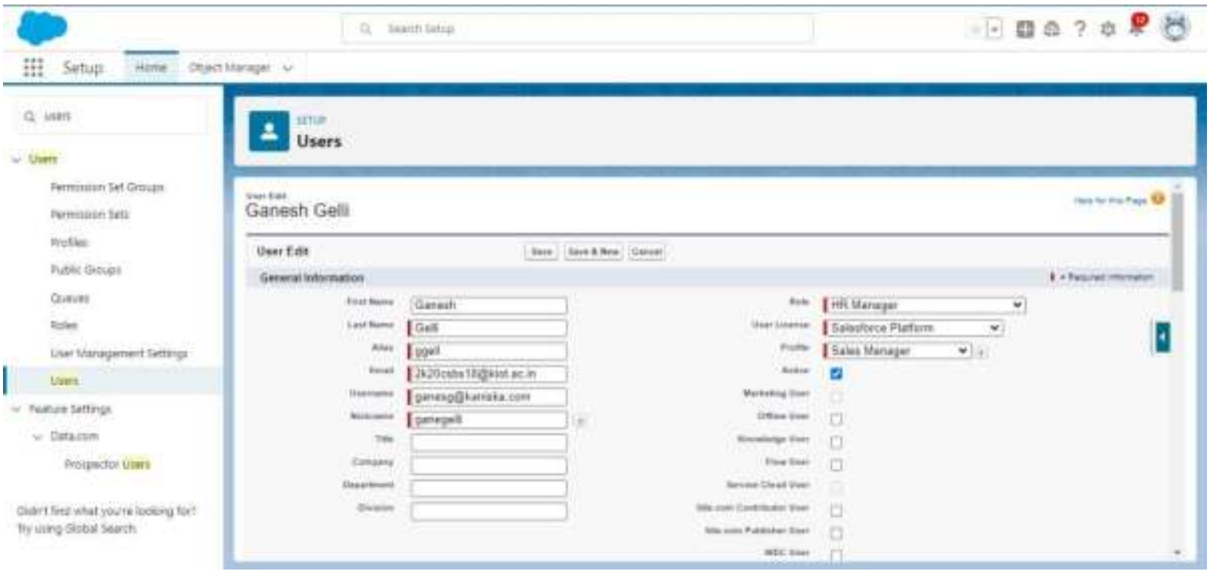
3.Enter First name as Ganesh and last name as Gili.

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.

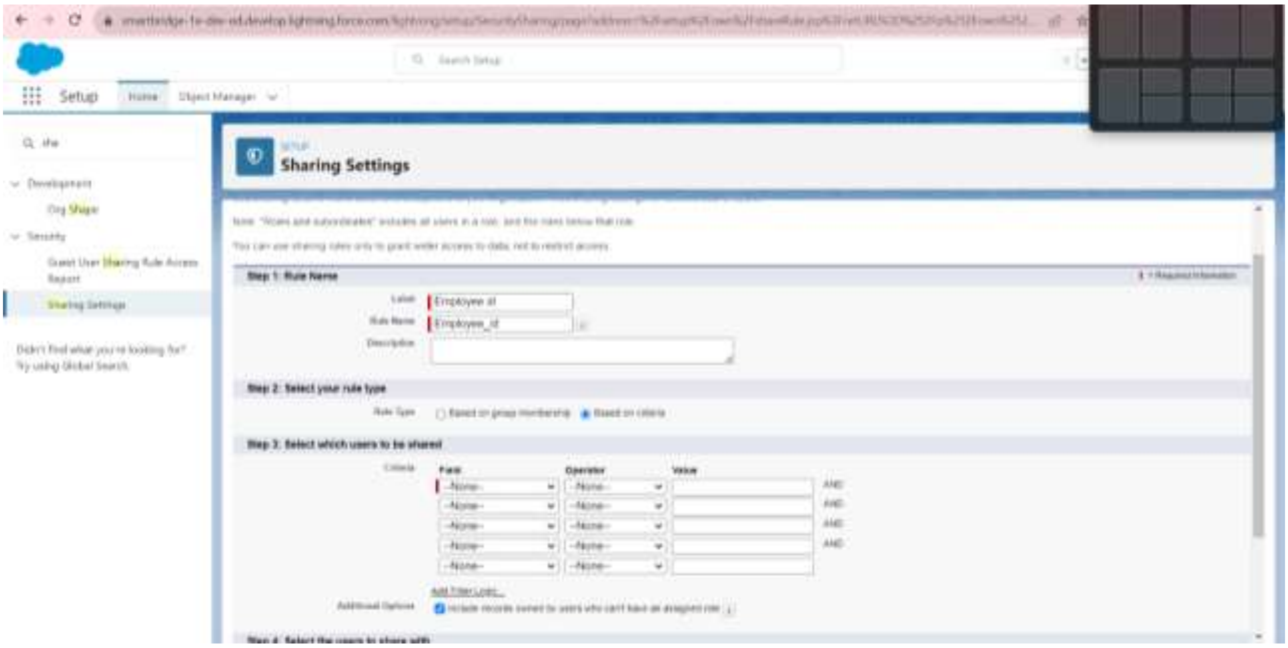
5.Select the field can join immediately check field from the candidate object.

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.



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.

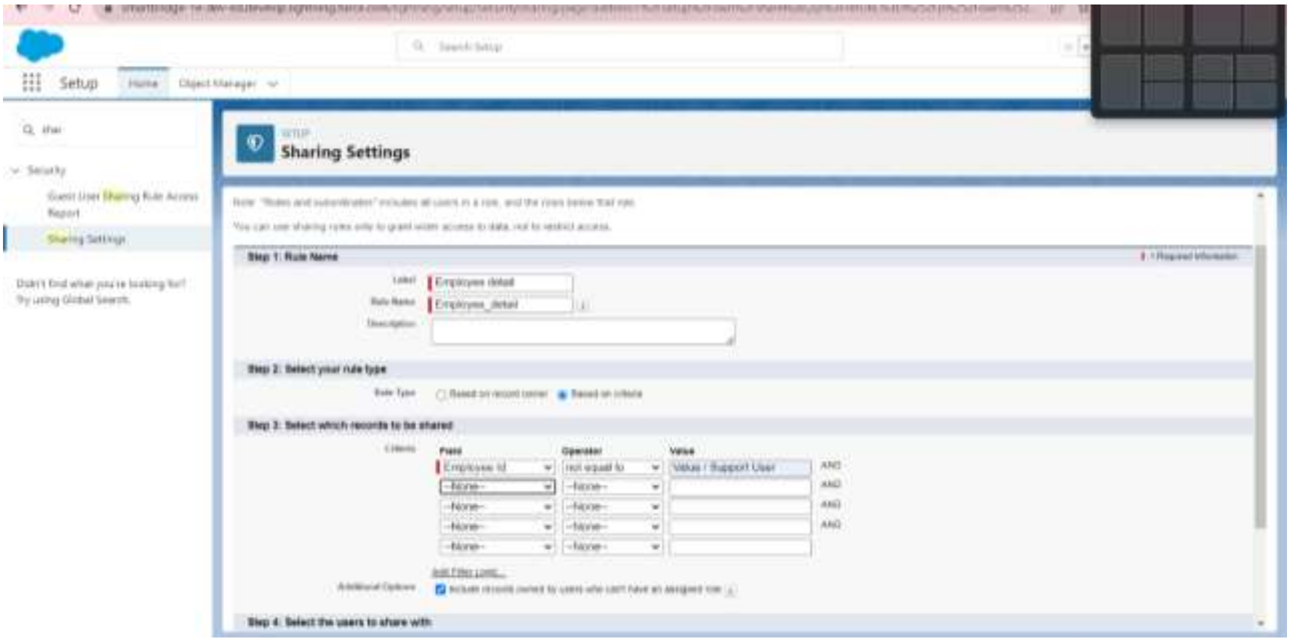
5.Select the field can join immediately check field from the Job Application object.

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.



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.

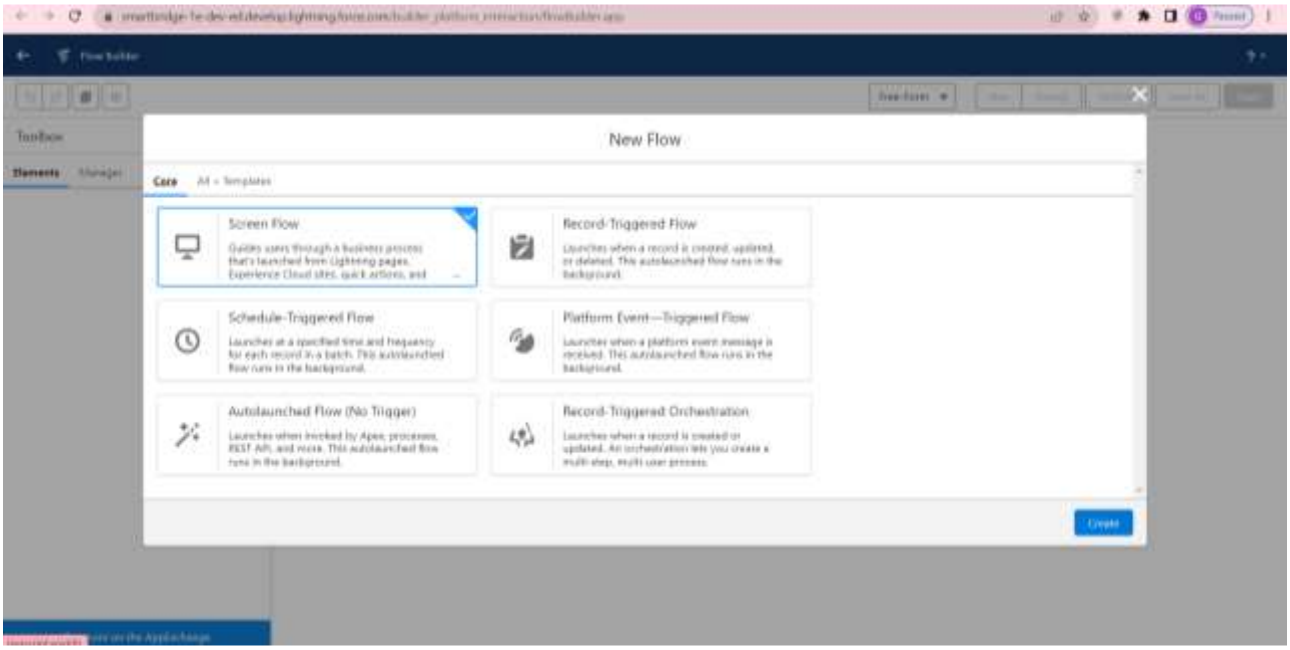
Step 6: Use the Flow Builder to add your flow logic. You can use elements like record updates, record lookups, decision elements, and more to define the actions that should occur when a record event is triggered.

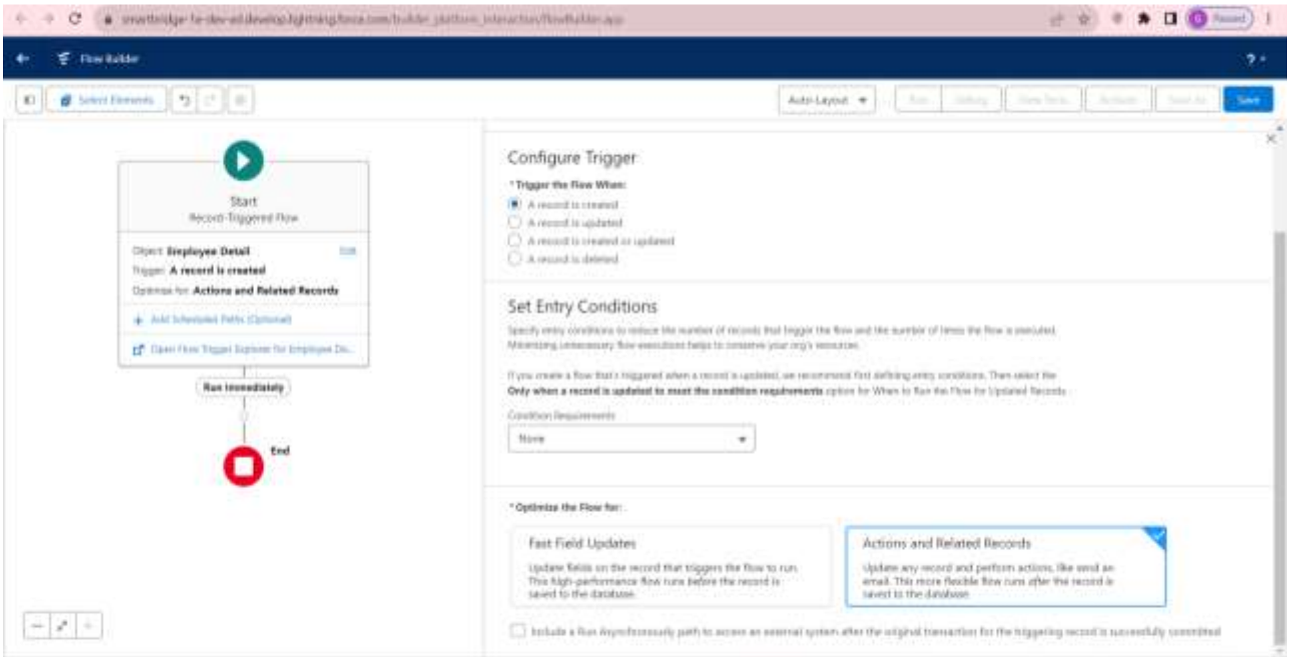
Step 7: Define the actions you want the flow to take. For example, you can update related records, send emails, create new records, or execute custom Apex code.

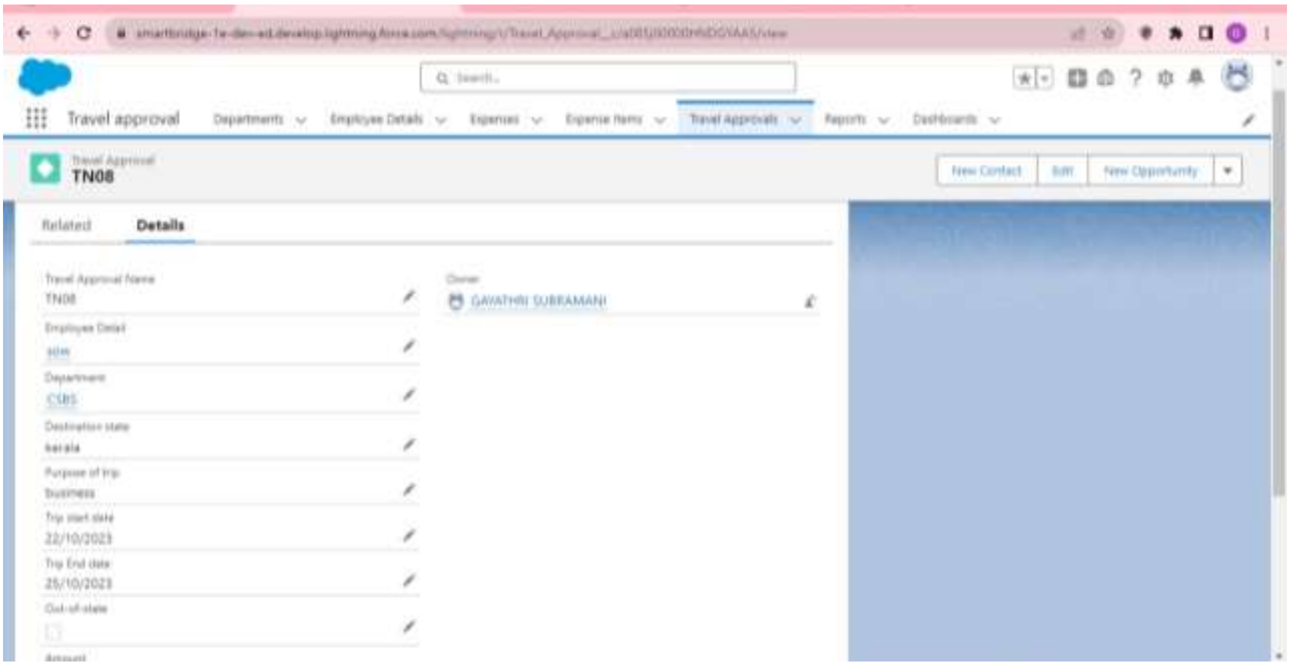
Step 8: Set Flow Variables (Optional)

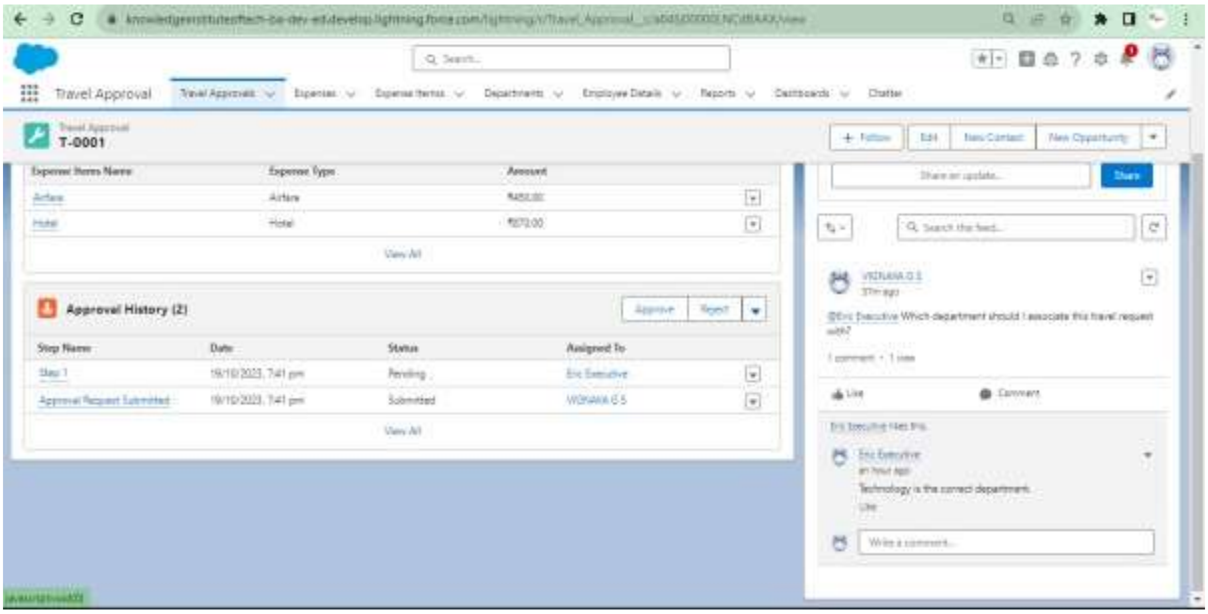
Step 9: Save the Flow

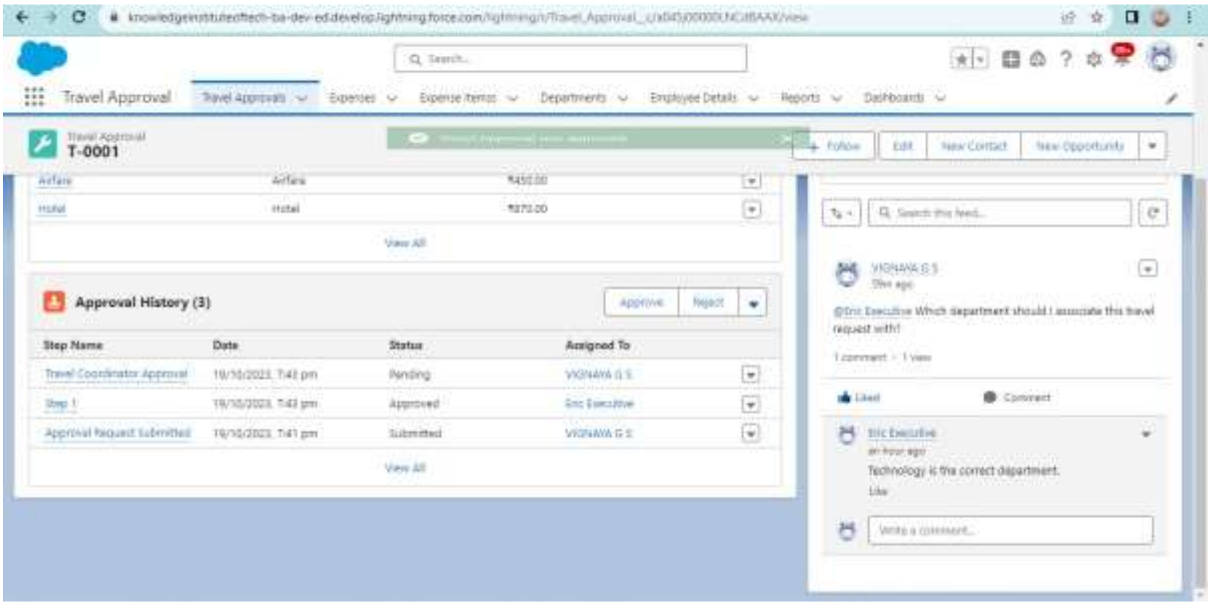
Step 10: Test the Flow




Flow Builder
Auto-Layout
Save
Start
Record-Triggered Flow
Object: Employee Detail
Trigger: A record is created
Optimize for: Actions and Related Records
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
Condition Requirements
None
* Optimize the Flow for:
Fast Field Updates
Actions and Related Records


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
Department
Destination state
kerala
Purpose of trip
business
Trip start date
22/10/2023
Trip End date
25/10/2023
Out-of-state
Amount
Owner
GAYATHRI 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:

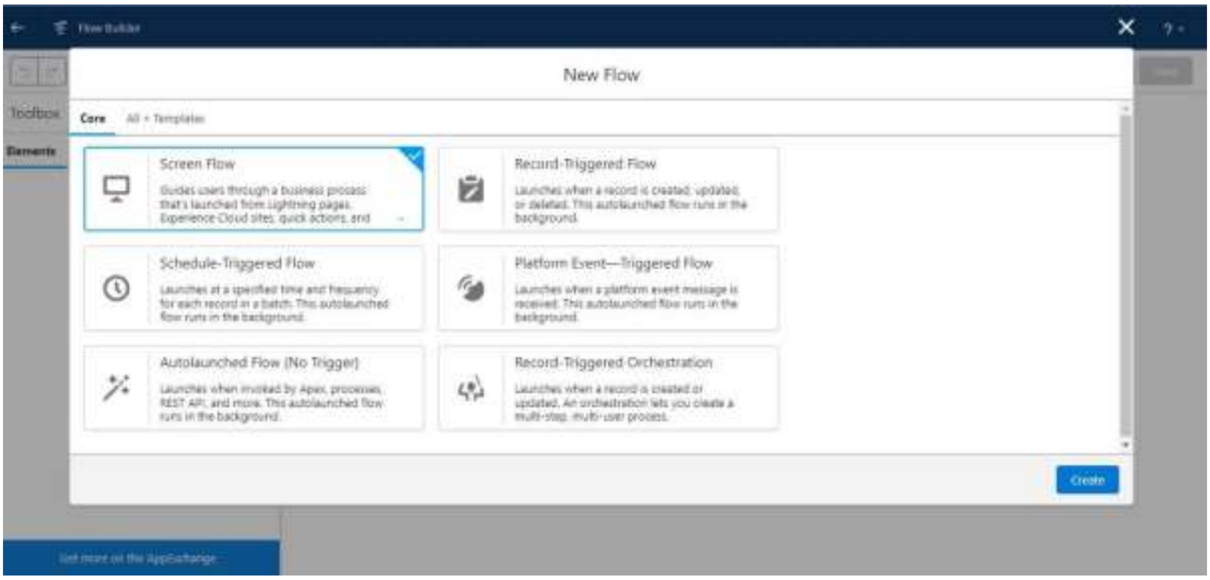
Step 6: Configure Flow Logic

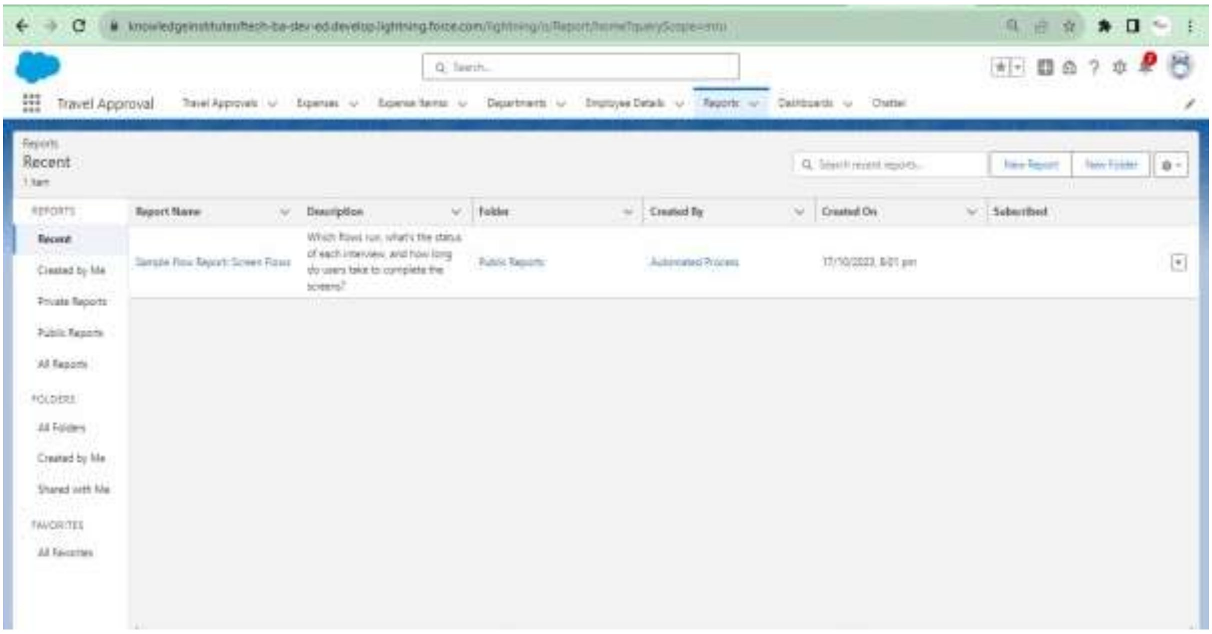
Step 7: Set Flow Variables (Optional)

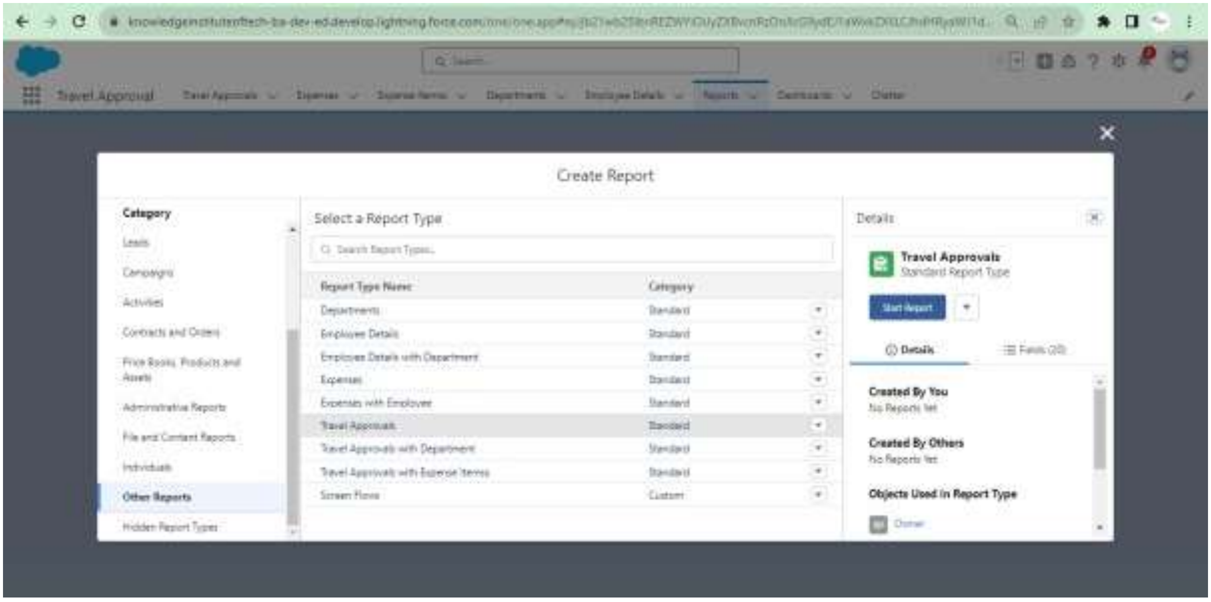
Step 8: Save the Flow

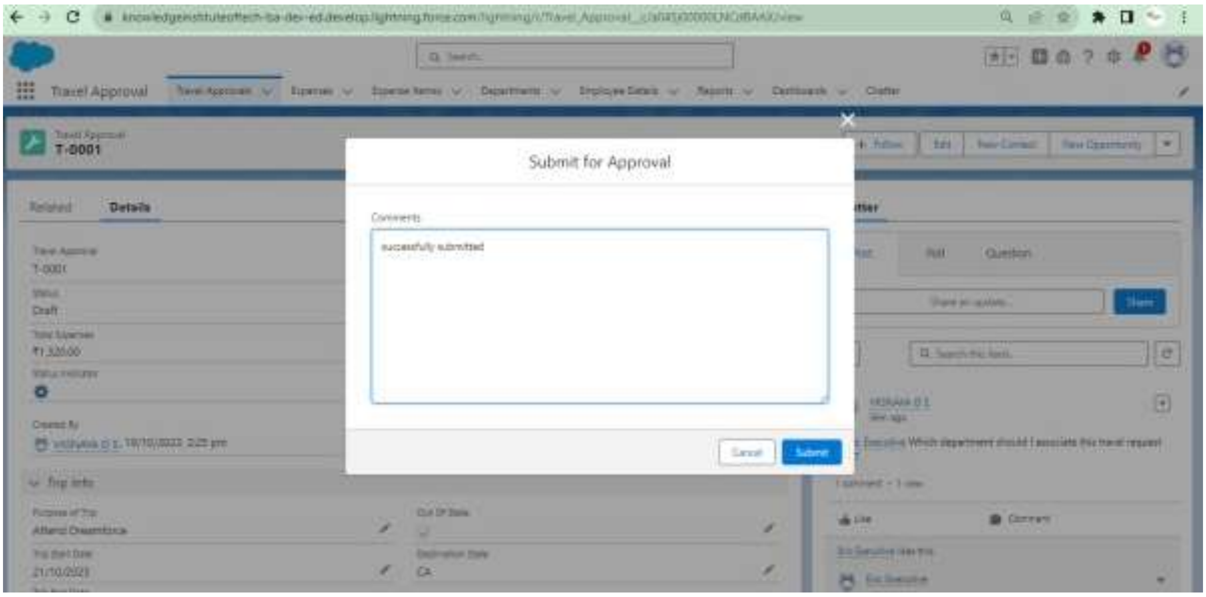
Step 9: Activate the Flow

Step 10: Test the Flow




Travel Approval
Reports
Recent
New Report
New Folder
Report Name
Description
Folder
Created By
Created On
Subscribed
Recent
Created by Me
Private Reports
Public Reports
All Reports
All Folders
Created by Me
Shared with Me
All Favorites


Travel Approval
Create Report
Category
Select a Report Type
Details
Travel Approvals
Report Type Name
Category
Travel Approvals
Created By You
Created By Others
Objects Used in Report Type



Travel Approval
T-0001
Submit for Approval
Comments
successfully submitted
Cancel
Submit
Related
Details
Draft
Trip Info
Attend Dreamforce
CA
Question

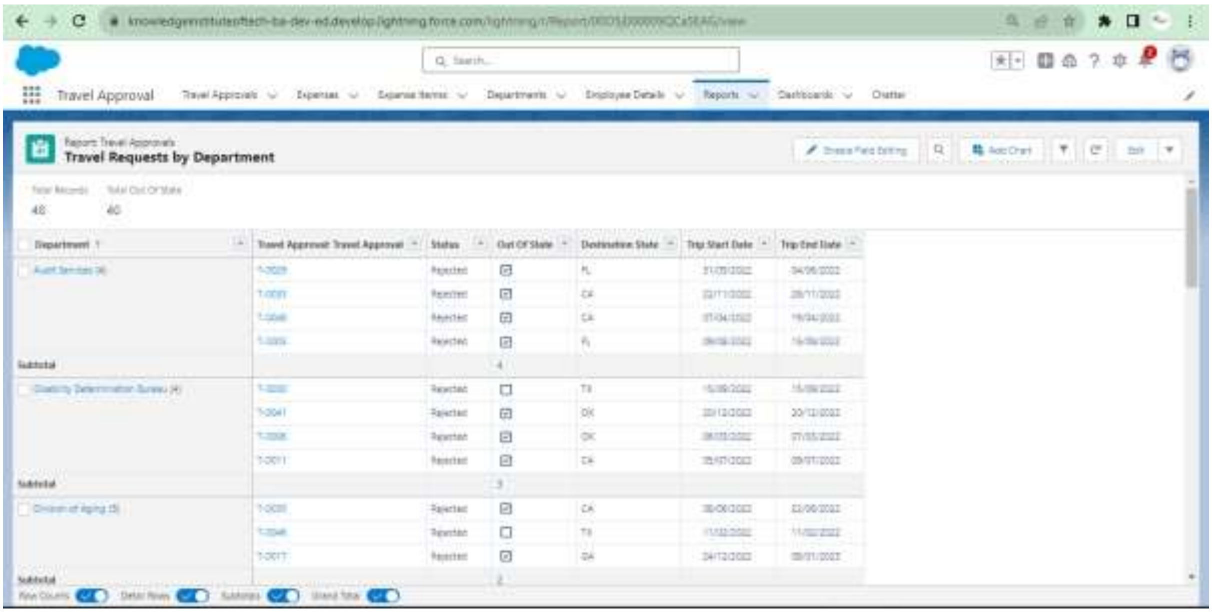
6.REPORTS & DASHBOARD

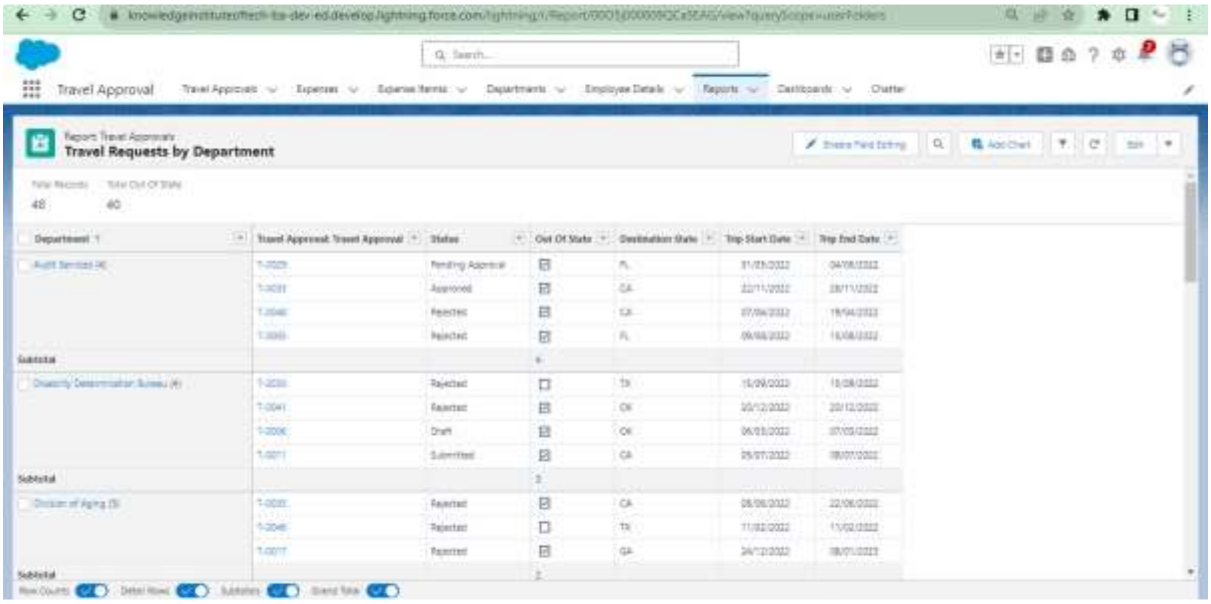
Reports

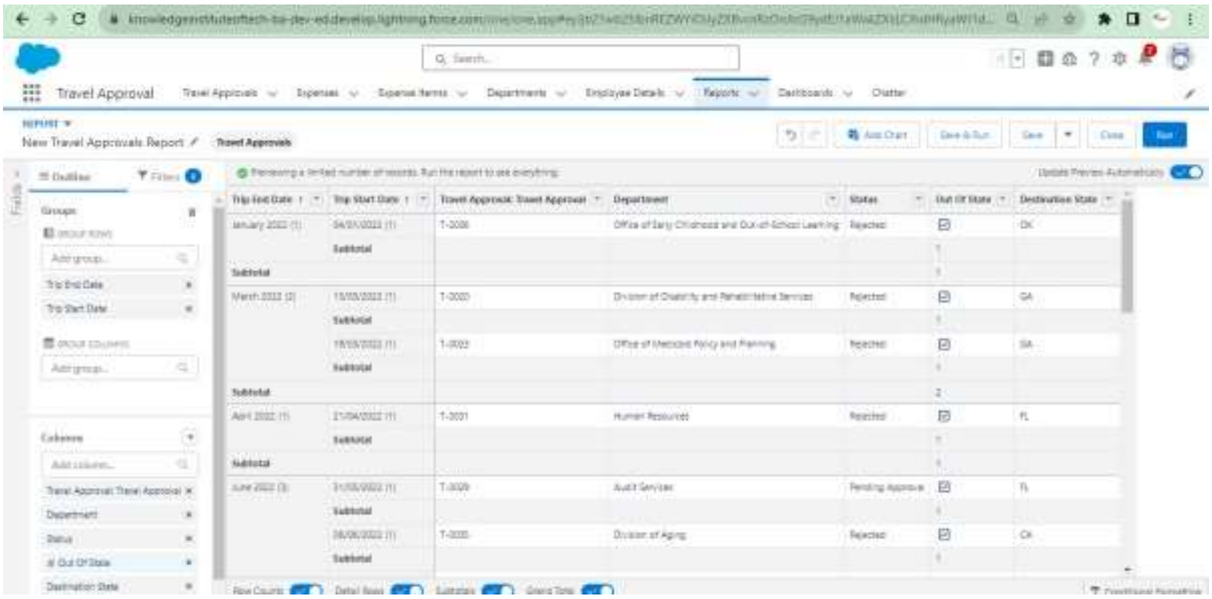
A report is a list of records that meet the criteria you define. It's displayed in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

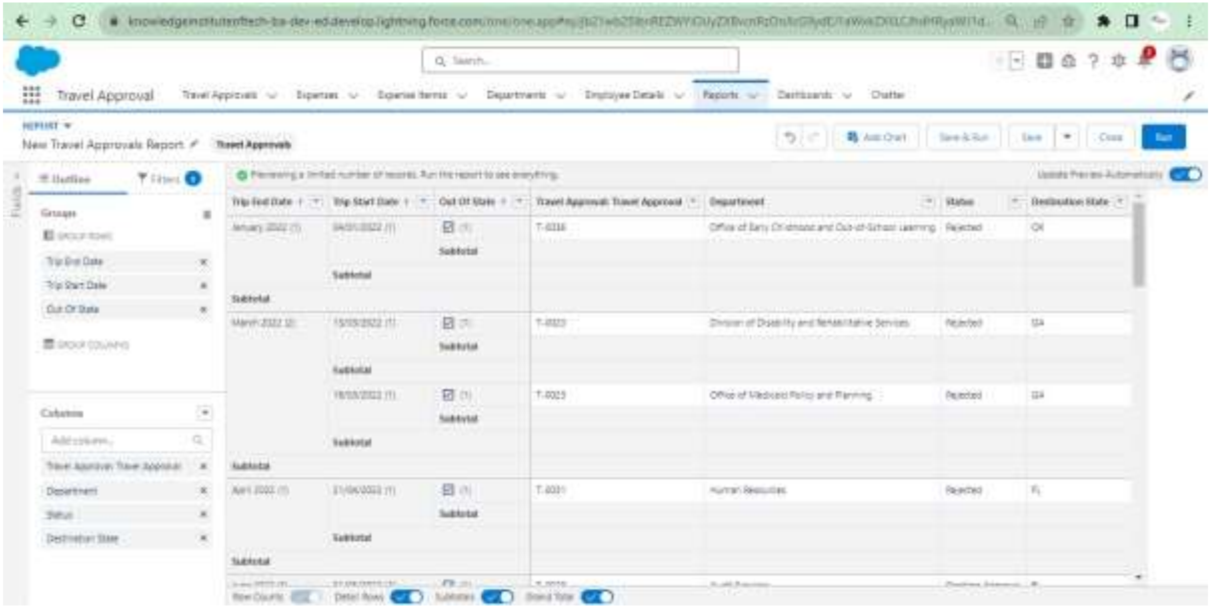
1)Create A Report

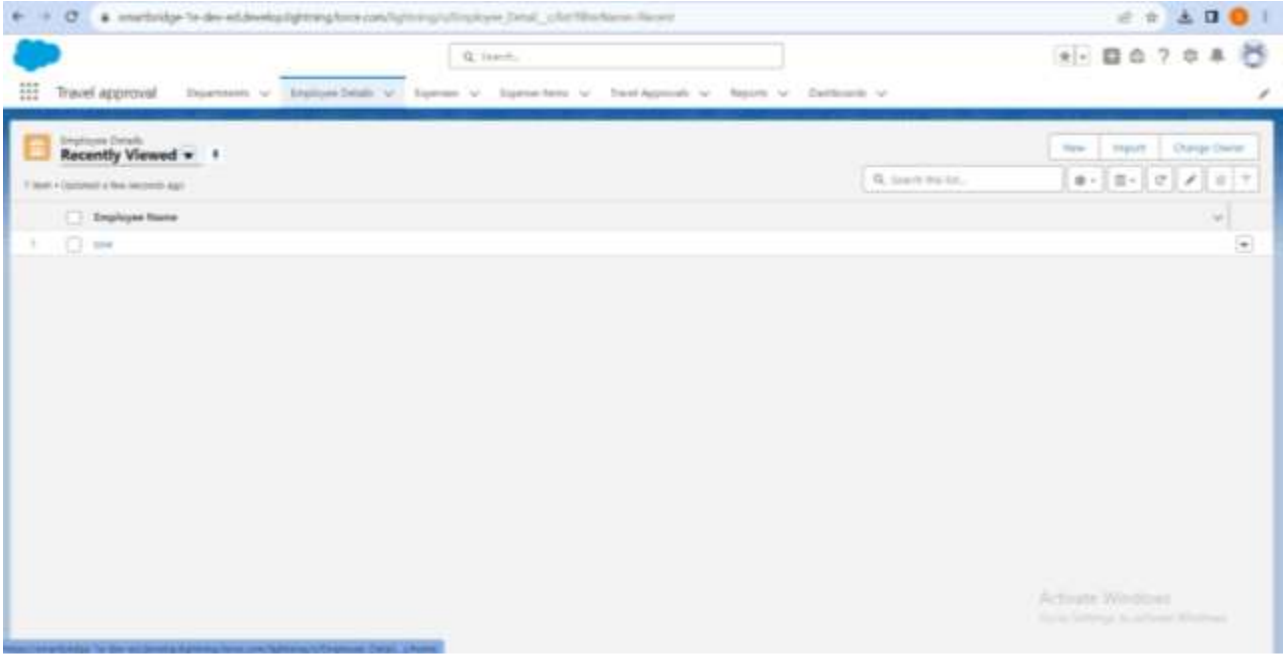
Step 1: Log in to your Salesforce account with the necessary permissions.
Step 2: Click on the "App Launcher" (grid icon) and search for "Reports." Click on "Reports" to open the Report Builder.
Step 3: In the Report Builder, click the "New Report" button to start creating a new report.
Step 4: Select 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.


Travel Approval
Travel Requests by Department
Department
Status
Out Of State
Destination State
Trip Start Date
Trip End Date
Subtotal


Travel Approval
Travel Requests by Department
Department
Status
Out Of State
Destination State
Trip Start Date
Trip End Date
Subtotal


Travel Approval
New Travel Approvals Report
Travel Approvals


Travel Approval
New Travel Approvals Report
Travel Approvals



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.

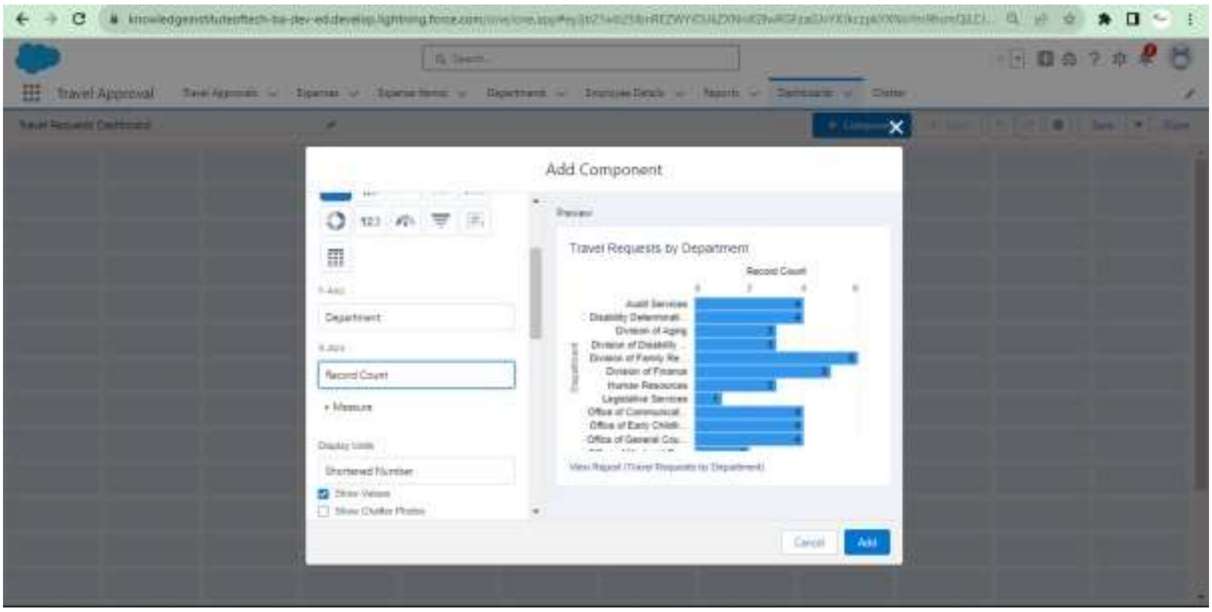
Step 7: Configure each component by selecting the report you want to display, specifying chart types, and setting up filters if needed.

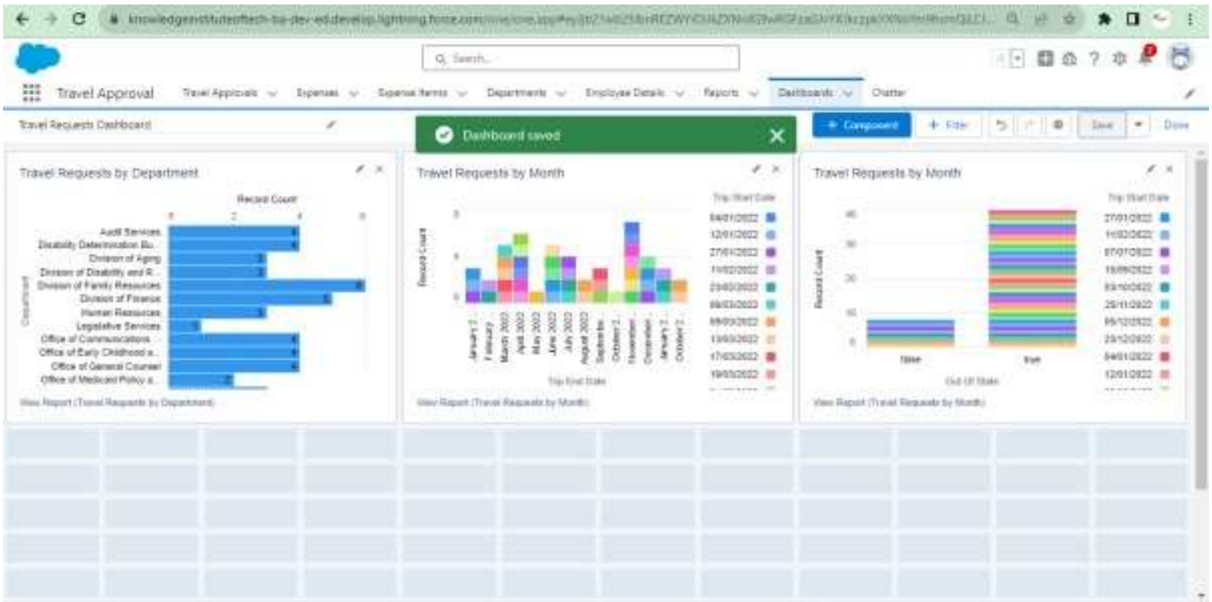
Step 8: Customize Dashboard Layout

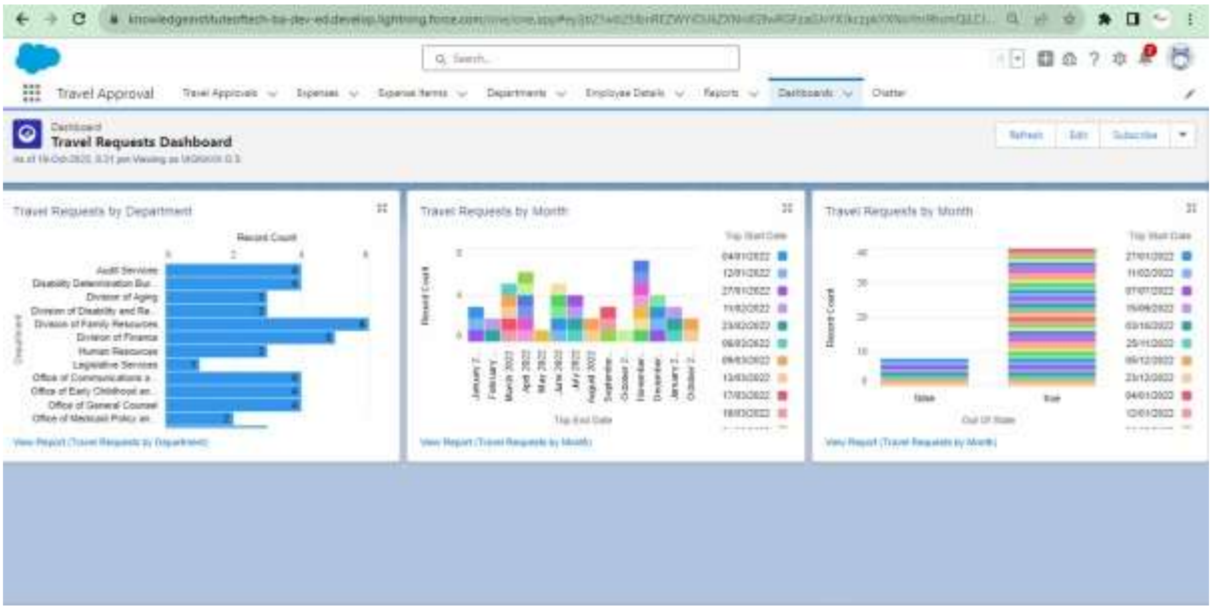
Step 9: Save the Dashboard

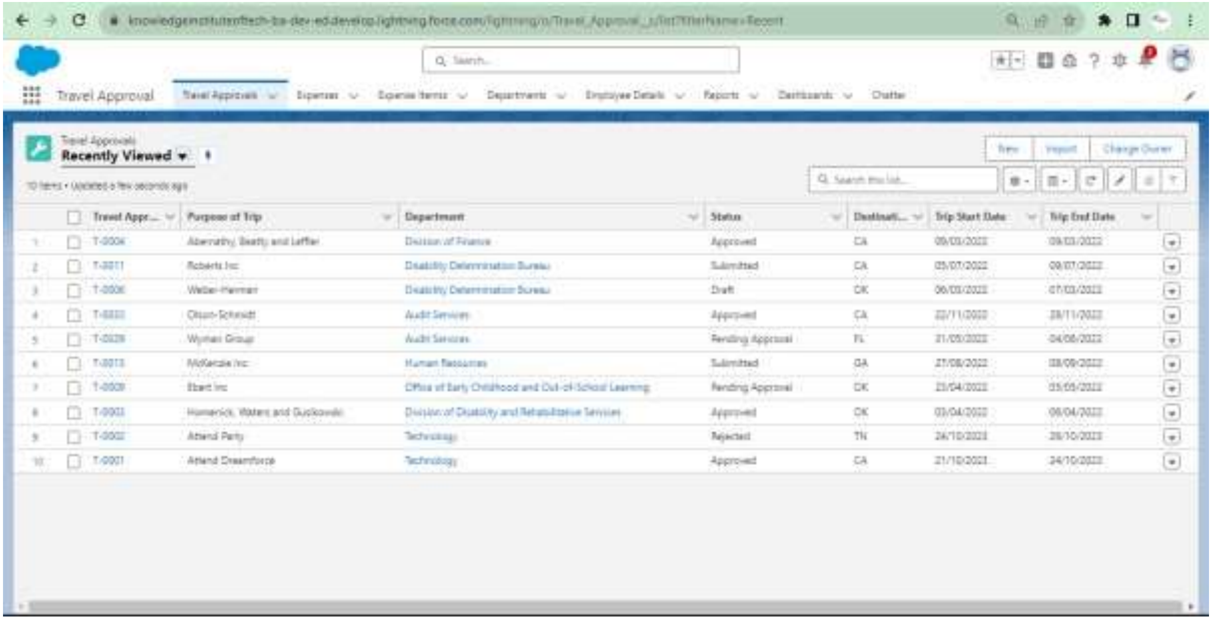
Step 10: Share the Dashboard

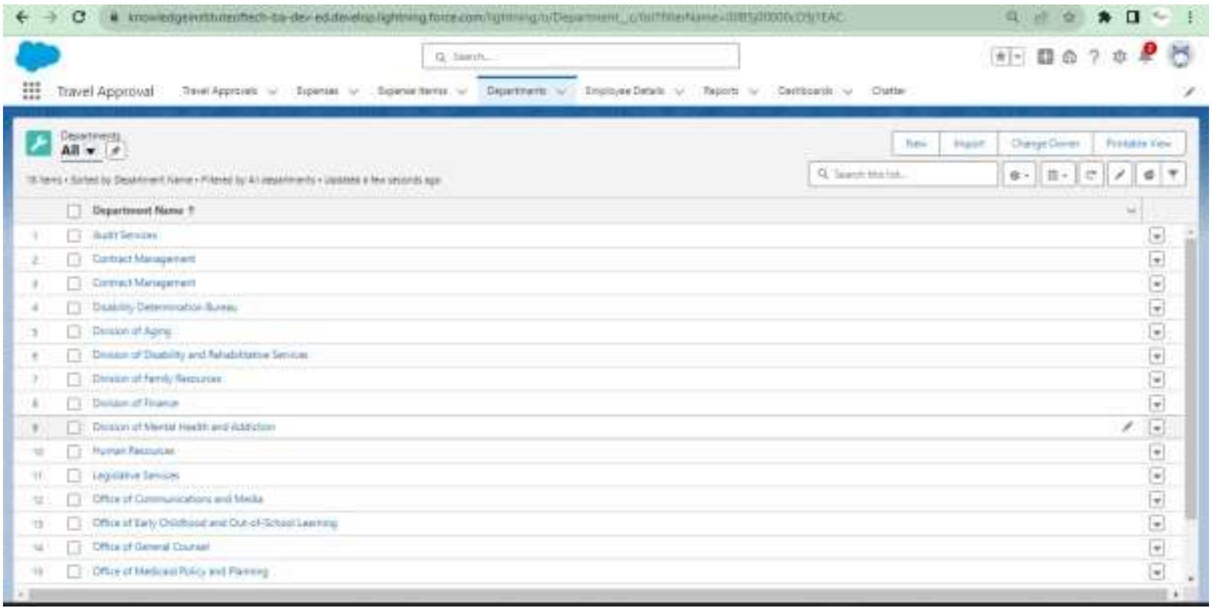
Step 11: Run and View the Dashboard

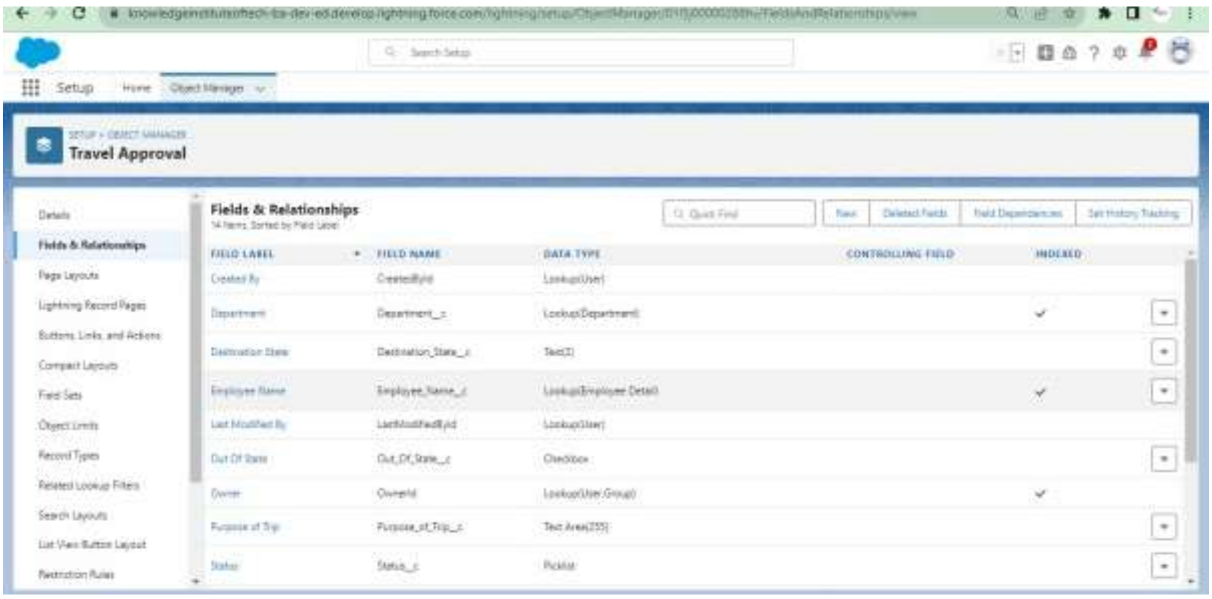





Travel Approval
Travel Requests Dashboard
Travel Requests by Department
Travel Requests by Month
Travel Requests by Month


Travel Approval
Recently Viewed





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