

DOMAIN : Salesforce Developer
USECASE : Employee Travel Approval
Application For Corporates

TEAM MEMBERS

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WHAT IS SALESFORCE?

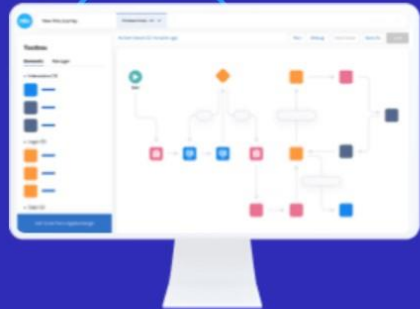
- Salesforce a CRM platform and it is a SaaS Cloud . Apart from this, it is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster.
- Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.
- Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Employee Travel Approval Application For Corporates

- The Employee Travel Approval Application will allow corporate employees to submit travel requests, specifying their destination, travel dates, and other relevant details. Managers and authorized personnel can then review and approve these requests within the Salesforce platform.
- The application will enable real-time tracking of travel requests, ensuring that employees receive timely approvals and updates, ultimately improving the overall travel management process and reducing administrative work.


CREATION OF DEVELOPER ACCOUNT

A Developer org has all the features and licenses you need to get started with Salesforce. 1. Search [Developer.salesforce.com/signup](https://developer.salesforce.com/signup)



Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
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Sign up for your Salesforce Developer Edition

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Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*

Last Name*

Email*

Role*

HOME PAGE

The screenshot displays the Salesforce Setup Home page within a web browser. The browser's address bar shows the URL: `knowledgeinstituteoftechn67-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home`. The page features a top navigation bar with the Salesforce logo, a search bar labeled "Search Setup", and a "Create" button. Below this, a secondary navigation bar includes "Setup", "Home", and "Object Manager".

On the left side, there is a "Quick Find" search bar and a list of setup categories under "Setup Home":

- Service Setup Assistant
- Commerce Setup Center
- Multi-Factor Authentication Assistant
- Hyperforce Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer

Below these categories, the "ADMINISTRATION" section is partially visible, showing links for "Users", "Data", and "Email".

The main content area is titled "SETUP Home" and contains three featured cards:

- Get Started with Einstein Bots**: Launch an AI-powered bot to automate your digital connections. Includes a "Get Started" button.
- Mobile Publisher**: Use the Mobile Publisher to create your own branded mobile app. Includes a "Learn More" button.
- Real-time Collaborative Docs**: Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce. Includes a "Get Started" button.

At the bottom of the main content area, there is a section titled "Most Recently Used" with a sub-header "10 items". Below this, a table is partially visible with columns for "NAME", "TYPE", and "OBJECT".

The bottom of the image shows a Windows taskbar with the date and time "14:00 21-10-2023" and various system icons.

WHAT IS AN SALESFORCE OBJECT?


- 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

- Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- 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 The Following Custom Objects:

- Department
- Employee Detail
- Expense
- Expense Items
- Travel Approval



Service SetupHomeObject Manager

Search Setup



SETUP > OBJECT MANAGER

Department

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Details

Description

API Name

Department_c

Custom

✓

Singular Label

Department

Plural Label

Departments

Enable Reports

✓

Track Activities

✓

Track Field History

✓


Deployment Status

Deployed

Help Settings







Standard salesforce.com Help Window

EditDelete



Service SetupHomeObject Manager

Search Setup



SETUP > OBJECT MANAGER

Employee Detail

Details

Fields & Relationships

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Details

Description

API Name

Employee_Detail_c

Custom

✓

Singular Label

Employee Detail

Plural Label

Employee Details

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

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:

Standard Object Tabs:

Standard object tabs display data related to standard objects.

Custom Object Tabs:

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

Web Tabs:

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

Visualforce Tabs:

Visualforce Tabs display data from a Visualforce Page.

LIGHTNING APP

What is an 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:

1. Standard apps:

These apps come with every occurrence of Salesforce as default. Community, Call Center, 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.

2. 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.

FIELDS AND RELATIONSHIP

What are fields?

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.

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.

ROLES

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

USER

What is a 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.

NOTE

As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don't find salesforce license then deactivate a user who has salesforce license Or change the license type from Salesforce to any other.

SHARING RULES

What are 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

Owner-based Sharing Rules

Criteria-based Sharing Rules

USER ADOPTION

Salesforce user adoption is the act of enabling a user to use SFDC's full CRM capabilities by creating strategies around onboarding, training, and continued development – all to drive overall digital adoption.

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.

DASHBOARDS


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.

FLOWS



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:

- Screen Flows
- Schedule-Triggered Flows
- Auto launched Flows
- Record-Triggered Flows
- Platform Event-Triggered Flows







 Departments





Recently Viewed

New Import

4 items • Updated a few seconds ago

	<input type="checkbox"/> Department Name	
1	<input type="checkbox"/> CSBS	
2	<input type="checkbox"/> IT	
3	<input type="checkbox"/> ECE	
4	<input type="checkbox"/> EEE	

Recently Viewed | Employee Details | Travel Approval | Salesforce | TN08 | Travel Approval | S... | (3) WhatsApp | Employee Travel Approval | New Tab

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/o/Employee_Detail_c/list?filterName=Recent

Search...

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

Employee Details Recently Viewed

1 item • Updated a few seconds ago

New Import Change Owner

Search this list...

	Employee Name
1	sow

Activate Windows
Go to Settings to activate Windows.

https://smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/o/Employee_Detail_c/home

Type here to search

28°C Partly sunny 12:12 22-10-2023

Recently Viewed | Expense | Travel Approval | Salesforce | TN08 | Travel Approval | S... | (3) WhatsApp | Employee Travel Approval | New Tab

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/o/Expense_c/list?filterName=Recent

Search...

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

Expenses Recently Viewed

1 item • Updated a few seconds ago

New Import

Search this list...

	Expense Name
1	JP-0001

Activate Windows
Go to Settings to activate Windows.

https://smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/o/Expense_c/home

Type here to search

28°C Partly sunny 12:12 22-10-2023

Recently Viewed | Expense | Travel Approval | Salesfor... | TN08 | Travel Approval | 5... | (3) WhatsApp | Employee Travel Approval | New Tab

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/o/Expense_Items__c/list?filterName=Recent

Search...

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

Expense Items Recently Viewed

1 item • Updated a few seconds ago

Search this list...

New Import

<input type="checkbox"/>	Expense Items Name
1	<input type="checkbox"/> TN08

Activate Windows
Go to Settings to activate Windows.

https://smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/o/Expense_Items__c/home

Type here to search

28°C Partly sunny 12:12 22-10-2023

Recently Viewed | Travel A... | Travel Approval | Salesfor... | TN08 | Travel Approval | 5... | (3) WhatsApp | Employee Travel Approval | New Tab

smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/o/Travel_Approval__c/list?filterName=Recent

Search...

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

Travel Approvals Recently Viewed

1 item • Updated a few seconds ago

Search this list...

New Import Change Owner

<input type="checkbox"/>	Travel Approval Name
1	<input type="checkbox"/> TN08

Activate Windows
Go to Settings to activate Windows.

https://smartbridge-1e-dev-ed.develop.lightning.force.com/lightning/o/Travel_Approval__c/home

Type here to search

28°C Partly sunny 12:12 22-10-2023

Recently Viewed | Employee Det... | T-0001 | Travel Approval | Salesf... | Travel Approval | Salesforce

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j00000288hv/MySearchLayouts/view

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

Search Layouts
41 Items, Sorted by Profile

PROFILE	COLUMNS DISPLAYED
Default Layout	Travel Approval
Analytics Cloud Integration User	Default Layout
Analytics Cloud Security User	Default Layout
Authenticated Website	Default Layout
Authenticated Website	Default Layout
B2B Reordering Portal Buyer Profile	Default Layout
Chatter External User	Default Layout

https://knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0115j00000288hv/ButtonsLinksActions/view

Search

ENG IN 18:09 19-10-2023

Recently Viewed | Employee Det... | T-0001 | Travel Approval | Salesf... | Travel Approval | Salesforce

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j00000288hv/MySearchLayouts/page?address=%2Fp%2Fset...

Setup Home Object Manager

SETUP > OBJECT MANAGER
Travel Approval

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

Select the fields to include in this search layout. Note that your choices only determine the display of search results and do not affect the fields that are actually searched. Your selections also determine the fields that are available to users when customizing their search results columns. Please refer to the online help for [more information on search fields](#).

Available Fields		Selected Fields
Record ID	Add Remove	Travel Approval
Out Of State		Purpose of Trip
Owner Alias		Department
Owner First Name		Status
Owner Last Name		Destination State
Created By Alias		Trip Start Date
Created By		Trip End Date
Created Date		
Last Modified By Alias		
Last Modified By		
Last Modified Date		

☐ Override the search result column customizations for all users

Standard Buttons
There are no customizable standard buttons for this view.

Custom Buttons
[Click here to create a new custom list button](#)

Search

ENG IN 18:10 19-10-2023

Recently Viewed | Employee Det... | T-0001 | Travel Approval | Salesf... | Travel Approval | Salesforce

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j00000288hv/MySearchLayouts/page?address=%2Fp%2Fset...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Travel Approval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Available Fields		Selected Fields
Record ID		Travel Approval
Out Of State		Purpose of Trip
Owner Alias		Department
Owner First Name		Status
Owner Last Name		Destination State
Created By Alias		Trip Start Date
Created By		Trip End Date
Created Date		
Last Modified By Alias		
Last Modified By		
Last Modified Date		

☐ Override the search result column customizations for all users

Standard Buttons

There are no customizable standard buttons for this view.

Custom Buttons

[Click here to create a new custom list button.](#)

Recently Viewed | Employee Det... | T-0001 | Travel Approval | Salesf... | All | Travel Approvals | Salesforce

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/o/Travel_Approval_/list?filterName=00B5j00000cO9kEEAS

Search...

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

Travel Approvals

All

1 item • Sorted by Travel Approval • Filtered by All travel approval

	Travel Approval
1	T-0001

Select Fields to Display

Available Fields		Visible Fields
Out Of State		Travel Approval
Owner Alias		Department
Owner First Name		Created By
Owner Last Name		Status
Purpose of Trip		Trip Start Date
Record ID		Trip End Date

Recently x Travel Ap: x T-0001 x Recently x Recently x Travel A: x Approval x Out of St: x Travel Ap: x

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04a5j000000QLmF%3FappLayout%3...

Search Setup

Setup Home Object Manager

process

Feature Settings

Marketing

Lead Processes

Sales

Sales Processes

Service

Entitlement Management

Entitlement Processes

Support Processes

Process Automation

Approval Processes

Automation Home (Beta)

Flows

Migrate to Flow

Next Best Action

Paused And Failed Flow Interviews

Post Templates

Approval Processes

Approval Processes

Travel Approval: Travel Approval Request

Back to Approval Process List

Process Definition Detail

Edit Clone Deactivate

Process Name	Travel Approval Request	Active	✓
Unique Name	Travel_Approval_Request	Next Automated Approver Determined By	Manager of Record Submitter
Description			
Entry Criteria	Travel Approval: Total Expenses GREATER THAN 0		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Travel Approval Owner		
Created By	VIGNAYA G.S. 19/10/2023, 7:28 pm		Modified By VIGNAYA G.S. 19/10/2023, 7:34 pm

Initial Submission Actions

Add Existing Add New

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps

Show Actions Edit

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
	1	Step 1			Manager	Final Rejection

Search

ENG IN

19:34 19-10-2023

Add Component

123

Y-Axis

Department

X-Axis

Record Count

+ Measure

Display Units

Shortened Number

☒ Show Values

☐ Show Chatter Photos

Preview

Travel Requests by Department

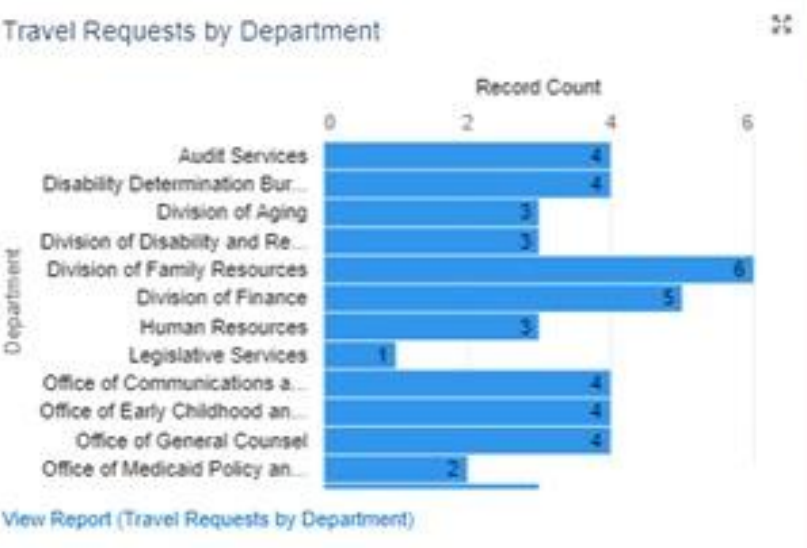
Department	Record Count
Audit Services	4
Disability Determinati...	4
Division of Aging	3
Division of Disability ...	3
Division of Family Re ...	6
Division of Finance	5
Human Resources	3
Legislative Services	1
Office of Communicat...	4
Office of Early Childh...	4
Office of General Cou...	4

View Report (Travel Requests by Department)

Cancel

Add

Dashboard
Travel Requests Dashboard
As of 19-Oct-2023, 8:21 pm Viewing as VIGNAYA G S



GITHUB LINK-

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

GOOGLE DRIVE LINK-

<https://drive.google.com/file/d/15mnKu9WiTFSVenzpbPhQAempNuxscTQx/view>

THANKYOU !