

Milestone 1- Create Salesforce Org

Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

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.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3lGde5k>

Object In Salesforce

Salesforce objects are database tables that permit you to store data that is specific to an organization. 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.

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.
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.

Creation Of Department Object For Travel Approval App

For this Travel Approval we need to create 5 objects **Department, Employee Detail, Expense, Expense Items, and Travel Approval**. The below steps will assist you in creating those objects.

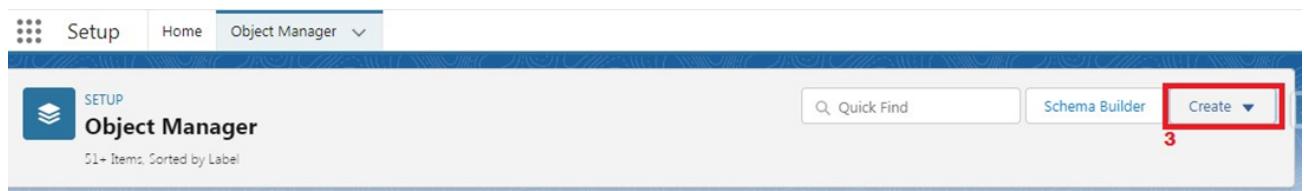
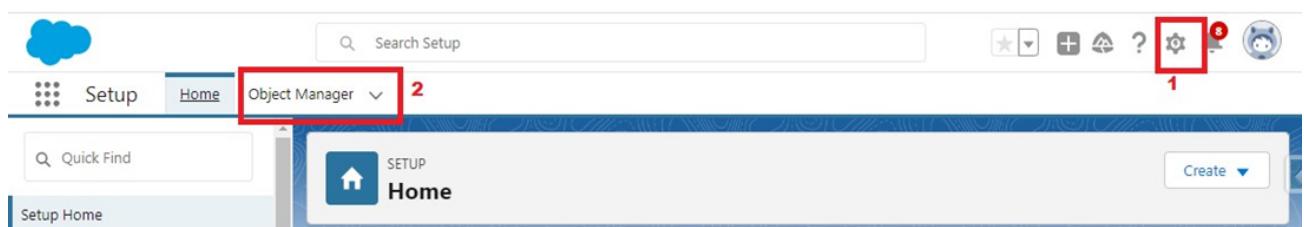
Create Department Object:

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: Department
6. Plural Label: *Departments*
7. Record Name: *Department Name*
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.

In the same way create 4 more objects **Employee Detail, Expense, Expense Items, and Travel Approval**

Note –

1. While making Expense Object select data type “Auto Number” in “Enter Record Name Label and Format” section.
2. While making Employee Detail Object put “Employee Name” in “Enter Record Name Label and Format” section.



5	Label	Department	Example: Account
6	Plural Label	Departments	Example: Accounts
Starts with vowel sound <input type="checkbox"/>			

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

Description

Context-Sensitive Help Setting
 Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

7 Record Name Example: Account Name

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing

8

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Allow Search

9

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

10

What Is A Tab?

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:

(A) Standard Object Tabs: Standard object tabs display data related to standard objects

(B) Custom Object Tabs: Custom object tabs displays data related to custom objects.

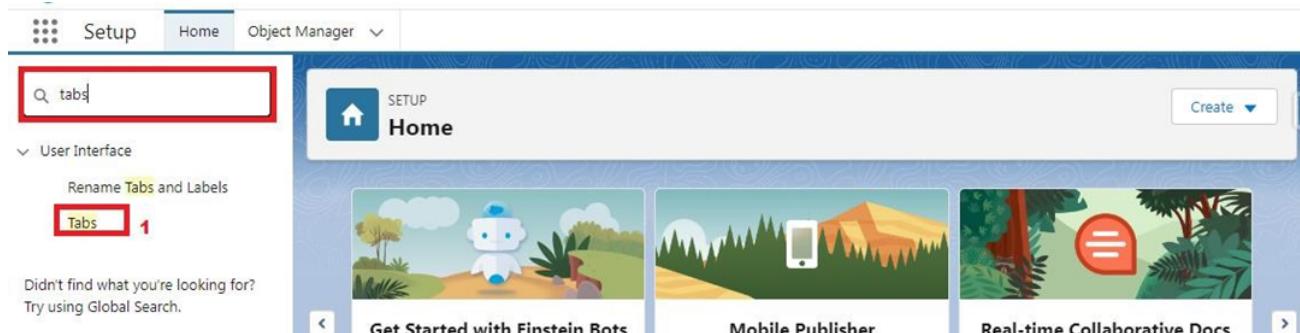
(C) Web Tabs: Web Tabs display any external Web-based application or Web page in Salesforce tabs.

(D) Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

Custom Tab Creation

Now create a custom tab. Click the Home tab.

1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Department.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save
6. In the same way create Tabs for all Custom Objects - Employee Detail, Expense, Expense Items, Travel Approval.



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 two types of apps -

1. Standard App: Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center, content, Salesforce Chatter, App Launcher, etc are present in it.
Note: The description, Logo, and Label of the standard app cannot be altered.
2. Custom Apps: Custom apps are created according to the needs of the user. Custom Apps are made by using standard and custom tabs together.

Note: Logos for Custom Apps can be changed.

Create Travel Approval App

Create the Travel Approval app

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter **Travel Approval** as the App Name, then click Next
4. Under App Options, leave the default selections and click Next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select **Department, Employee Detail, Expense, Expense Items, Travel Approval, Reports, and Dashboards** and move them to Selected Items. Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

This screenshot shows the classic Salesforce App Manager interface. At the top, there's a navigation bar with 'Setup' (selected), 'Home', and 'Object Manager'. Below the navigation is a search bar containing 'app man'. A red box labeled '1' highlights the 'App Manager' link under the 'Apps' section. The main area shows a 'SETUP Home' dashboard with three cards: one featuring a white robot-like character, another showing a smartphone and tent, and a third showing a jungle scene with a red speech bubble icon. A 'Create' button is visible in the top right corner of the dashboard area. A message at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

This screenshot shows the Lightning Experience App Manager interface. At the top, there's a navigation bar with 'Setup' (selected), 'Home', and 'Object Manager'. Below the navigation is a search bar containing 'app man'. A red box labeled '2' highlights the 'New Lightning App' button in the top right corner of the main content area. The main area is titled 'Lightning Experience App Manager' and includes a 'Clone Apps(Beta)' button. The overall layout is more modern and minimalist than the classic interface.

App Details & Branding

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

App Details

App Branding

3

<p>* App Name i</p> <input type="text" value="Travel Approval"/>	<p>Image i</p> <p>Primary Color Hex Value i</p> <p>#0070D2</p>
<p>* Developer Name i</p> <input type="text" value="Travel_Approval"/>	<p>Upload</p>

6

<p>Available Items C Create ▾</p> <p>DAS</p> <p>Dashboards</p>	<p>Selected Items</p> <p>Departments</p> <p>Employee Details</p> <p>Expenses</p> <p>Expense Items</p> <p>Reports</p> <p>click here to add items</p>
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New Lightning App

The screenshot shows the 'Available Profiles' section of the New Lightning App setup. A red box highlights the search bar where 'system ad' is typed. Below it, the 'System Administrator' profile is listed. A red number '7' is overlaid on the left side of the list. To the right, the 'Selected Profiles' section shows 'No Profiles selected'. At the bottom right is a 'Save & Finish' button.

To verify your changes, click the App Launcher, type **Travel Approval** and select the **Travel Approval** app.

Note:

App Launcher-Displays available apps.

App Name-Displays the current selected app.

Fields And Relationships

Fields - Fields store data values that are required for a particular object in a record.

An object relationship in Salesforce is a two-way association between two objects.

Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Creation Of Fields For The Department Object:

- 1.Click the gear icon and select Setup. This launches Setup in a new tab.
- 2.Click the Object Manager tab next to Home.
- 3.Select Department

4.Select Fields & Relationships from the left navigation

5.Click New

6.Select the Text as the Data Type, click Next.

7.For Field Label, enter Department Code and enter 5 in Length.

8.Click Next, Next, then Save & New.

9.Follow above steps and create two more Text type field - District & State.

10.Also, Provide Length 40 for both District and State field.

11.Create URL type field & give “School website” as the field label.

The screenshot shows the Salesforce Object Manager. A red box labeled '1' highlights the 'New' button in the top right corner of the toolbar. A red box labeled '2' highlights the 'Object Manager' tab in the top navigation bar. A red box labeled '3' highlights the 'Department' label in the table. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. One row is shown: Department (API Name: Department_c, Type: Custom Object, Last Modified: 08/04/2023).

The screenshot shows the Salesforce Fields & Relationships page. A red box labeled '4' highlights the 'Fields & Relationships' link in the left sidebar. A red box labeled '5' highlights the 'New' button in the top right corner of the toolbar. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Two rows are shown: Address (Field Label: Address, Field Name: Address_c, Data Type: Text(50)) and Created By (Field Label: Created By, Field Name: CreatedById, Data Type: Lookup(User)).

<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input checked="" type="radio"/> Text 6	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted) i	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.000" are all valid times for this field.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

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

Step 2. Enter the details

Step 2 of 4

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

Field Label	<input type="text" value="Department Code"/> 7
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Please enter the maximum length for a text field below.

Length	<input type="text" value="5"/>
--------	--------------------------------

Field Name	<input type="text" value="Department_Code"/> i
------------	--

Description

<input type="text"/>

Help Text

<input type="text"/>

Now let's create the other fields and we must choose the data types of the fields carefully.
Let's have a look at it.

These are fields and their data types we need to create and make one by one –

NOTE- See activity 2, 3, 4 below to create a lookup field, Roll-up summary field & Picklist field

Object Name	Field Name	Data Type
1. Employee Detail-	Date of Birth	Date
	Gender	Picklist (Male, Female)
	Department	Lookup (Department)(See activity 2 to create lookup)

Employee Id	Text (Length - 12)	
2. Expense-	Employee	Lookup (Employee Detail)
	Total Item	Rollup summary (Expense Item)
3. Expense Item -	Expense	Master Detail (Expense)
	Expense Type	Pick List (Values are- Transport, Hotel, Meal, Others)
	Amount	Currency
4. Travel Approval-	Employee Name	Lookup (Employee Detail)
	Department	Lookup (Department)
	Destination state	Text (Length – 40)
	Purpose of trip	Text (Length – 256)
	Trip start date	Date
	Trip End date	Date
	Status	Picklist (Values are- Approved, Rejected)

NOTE- Make Trip Start Date and Trip End Date field required when making these field

Lookup Relationship With Department

Let's create a Lookup relationship with Department object on Employee Detail object Follow steps 1 to 5 of field creation then follow below steps.

Select look up Relationship as the Data Type and click Next.

For Related to, enter Department.

Click Next.

For Field Label, enter Department.

Click Next, Next, Next and Save.

<input type="radio"/> 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.
<input type="radio"/> Roll-Up 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.
<input checked="" type="radio"/> 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.
<input type="radio"/> 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: <ul style="list-style-type: none"> The relationship field is required on all detail records. The ownership and sharing of a detail record are determined by the master record. When a user deletes the master record, all detail records are deleted.

• You can create rollup summary fields on the master record to summarize the detail records.
 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
 Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Step 2. Choose the related object

Step 2

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

Select the other object to which this object is related.

2

Related To

Department

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

Step 3. Enter the label and name for the lookup field

Step 3 of 6

4

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

Field Label

Department



Field Name

Department



Description

Help Text

Employee Detail
New Relationship

Help for this Page

Step 6. Add custom related lists

Step 6 of 6

[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

5

Field Label Department

Data Type Lookup

Field Name Department

Description

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label Employee Details

Let's create a master-detail relationship on Expense Item object Follow steps 1 to 5 of field creation then

follow below steps.

Select Master-Detail Relationship as the Data Type and click Next.

For Related to, enter Expense.

Click Next.

For Field Label, enter Expense.

Click Next, Next, Next and Save.

source fields change.

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.

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.

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

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

SETUP > OBJECT MANAGER
Expense Item

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 Item
New Relationship

Step 2. Choose the related object

Step 2 of 6

Help for this Page

Select the other object to which this object is related. **2**

Related To: Event

Previous Next Cancel

SETUP > OBJECT MANAGER
Expense Item

Details

Fields & Relationships

Expense Item
New Relationship

Step 3. Enter the label and name for the lookup field

Step 3 of 6

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Field Label: Expense 4

Field Name: Expense 5

Description:

Help Text:

Roll Up Summary Fields On Expense Object

Let's create Roll-up summary fields on Expense Object to calculate the expense

1. Click the gear icon Select Setup, This launches Setup in a new tab.
2. click Object Manager
3. Select Expense.
4. Click Fields & Relationships
5. Click New.

Select the Roll-up summary field as the data type

Enter the field label as Total Expense

Click Next

Then select the master object summarized as Expense items

Select Sum as roll-up and Field to aggregate Amount then click Next, Next and save.

Setup Home Object Manager 2 1

Object Manager 3

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Expense	Expense_c	Custom Object		08/04/2023	✓
Expense Item	Expense_Item_c	Custom Object		08/04/2023	✓

Details

Fields & Relationships 4

Page Layouts

Lightning Record Pages

Fields & Relationships				
11 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(50)		
Created By	CreatedBy	Lookup(User)		

Data Type

None 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 6 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.

Roll-Up 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:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Step 2. Enter the details Step 2 of 5

7

Field Label	<input type="text" value="Total Expense"/> i
Field Name	<input type="text" value="Total_Expense"/> i
Description	<input type="text"/>
Help Text	<input type="text"/>
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity i

Select Object to Summarize

Master Object: Expense 9

Summarized Object: 9

Select Roll-Up Type

COUNT
 SUM 10
 MIN
 MAX

Field to Aggregate: 10

Filter Criteria

All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

Previous Next Cancel

Pick List Field

Let's create a Pick-List field:

- 1) From Setup, click Object Manager and select Expense Item.
- 2) Click Fields & Relationships, then New.
- 3) Select Picklist as the Data Type and click Next.
- 4) For Field Label enter Expense Type
- 5) Select Enter values, with each value separated by a new line, and enter these values:

- Transport
- Hotel
- Meal
- others

Click Next, Next, then Save & New



2 Items, Sorted by Label

Label	API Name	Type	Description	Last Modified	Deployed
Expense	Expense_c	Custom Object		08/04/2023	✓
Expense Item	Expense_Item_c	Custom Object		08/04/2023	✓

SETUP > OBJECT MANAGER
Expense Item

Details 2a
Fields & Relationships 2b
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits

Fields & Relationships
6 Items, Sorted by Field Label

Field Label	Field Name	Data Type	Controlling Field	Indexed
Amount	Amount_c	Currency(10, 8)		
Created By	CreatedBy	Lookup(User)		

Details
Fields & Relationships 3
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits

Field Types

- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Allows users to enter any number. Leading zeros are removed.
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Allows users to enter any phone number. Automatically formats it as a phone number.
Allows users to select a value from a list you define.
Allows users to select multiple values from a list you define.
Allows users to enter any combination of letters and numbers.

SETUP > OBJECT MANAGER
Expense Item

Details
Fields & Relationships 4
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Step 2. Enter the details

Step 2 of 4

Field Label Expense Type

Values 5

- Use global picklist value set
- Enter values, with each value separated by a new line

6,7,8,9

Transport
Hotel
Meal
others

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set

Field Name 6ex

Previous 10 Next Cancel

Import Departments

NOTE- Before creating the application download this zip file from URL given below

<https://developer.salesforce.com/files/TravelAppWorkshopFiles.zip>

Data Import lets you upload data from external sources and combine it with data you collect via Analytics. You can then use Analytics to organize and analyze all of your data in ways that better reflect your business.

The Data Import Wizard is a Tool that makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects.

In order to complete this milestone, you need to create a CSV file and give them the data given in the picture below. After that from these CSV files we will import data for Department & Travel Approval (Custom Object)

1.CSV file Name- Department_CSv

	A	B
1	Department Name	Department code
2	Office of Communications and Media	O001
3	Disability Determination Bureau	D001
4	Division of Disability and Rehabilitative Services	D002
5	Technology	T001

Data Import

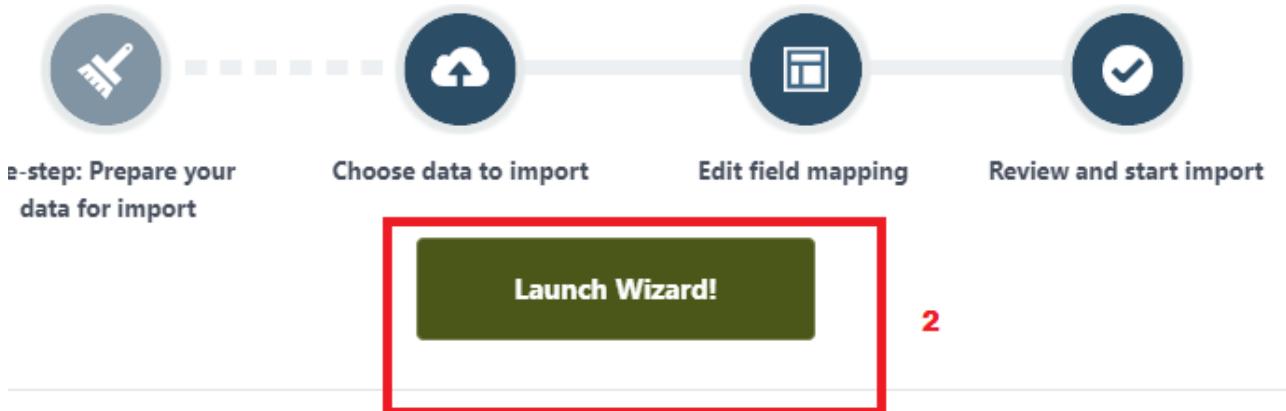
From Setup, click the Home tab.

- 1)In the Quick Find box, enter Data Import and select Data Import Wizard.
- 2)Click Launch Wizard!
- 3)Click the Custom Objects tab and select the Departments object.
- 4)Select Add new records.
- 5)Click CSV and choose file Department_CSv which we made earlier. Click Next.
- 6)Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

The next screen gives you a summary of your data import. Click Start Import.

Click OK on the popup.

A screenshot of the Salesforce Setup Home page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar on the left contains the text 'data impd'. Below the search bar, under 'Integrations', there is a red box around the 'Data Import Wizard' item, which has a red '1' notification above it. A message below says 'Didn't find what you're looking for? Try using Global Search.' The main content area shows three cards: one with a robot icon, one with a smartphone icon, and one with a document icon. A 'Create' button is in the top right corner.



A screenshot of the Data Import Wizard interface. At the top, a blue button says 'Let's do this'. Below it is a horizontal progress bar with three steps: 'Choose data' (blue dot), 'Edit mapping' (grey dot), and 'Start import' (grey dot). Under 'Choose data', there is a table with a single row for 'Customers'. The 'Customers' column shows a list of names: 'John Doe', 'Jane Smith', 'Mike Johnson', 'Sarah Williams', and 'David Brown'. The 'Edit mapping' and 'Start import' sections are currently empty.

Departments > 3

Drivers >

Import your Data into Salesforce

You can import up to 50,000 records at a time.

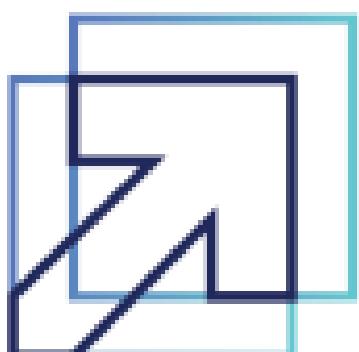
What kind of data are you importing? [?](#)

Standard objects	Custom objects
Attendees	>
Buyers	>

What do you want to do? [?](#)

Add new records	>	4
Update existing records	>	
Add new and update existing records	>	

Where is your data located? [?](#)



Smart Internz

Choose data

Edit mapping

Start import

What kind of data are you importing? [?](#)

What do you want to do? [?](#)

Where is your data located? [?](#)

Standard objects Custom objects

Attendees	Add new records	Drag CSV file here to upload
Buyers	Match by: <input type="button" value="--None--"/>	<input type="file"/> CSV
Customerss	Which User field in your file designates record owners? <input type="button" value="--None--"/>	
Departments	Trigger workflow rules and processes? <input type="checkbox"/> Trigger workflow rules and processes for new and updated records	5

Cancel Previous **Next**

Edit Field Mapping: Departments

Help for this page 

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Department Name	Department Name	Office of Co	Disability De	Division of Disability and Rehabilitative Services
Change	Department Code	Department code	O001	D001	D002

6

Cancel Previous **Next**

Choose data Edit mapping **Start import**

Review & Start Import

Help for this page 

Review your import information and click Start Import.

Your selections:	Your import will include:	Your import will not include:
Departments ✓ Add new records ✓ Departments csv.csv ✓	Mapped fields 2	Unmapped fields 0

7

Cancel Previous **Start Import**

Congratulations, your import has started!

Click OK to view your import status on the Bulk Data Load Job page.

8

OK

Note- Do Field mapping carefully.

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<https://developer.salesforce.com/files/TravelAppWorkshopFiles.zip>

Users

A user is anyone who logs into 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.

Creating A User In Salesforce

- 1.From Setup, in the Quick Find box, enter Users.
- 2.Select Users.
- 3.Click New User.
- 4.Enter the First Name Travel Approval and Last Name manager and (Your) 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. Select a User License as Salesforce.

NOTE- In the Developer edition Salesforce license can only be used by 2 Users at a time in Dev Org, 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.

6. Select a profile as Standard user.

7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password

emailed to your email.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing sections like 'Users' (highlighted with a red box and labeled 1), 'Feature Settings', 'Data.com', 'Prospector Users', and 'User Interface'. Under 'Users', there are sub-options: 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and another 'Users' option (highlighted with a red box and labeled 2). The main content area is titled 'All Users' and contains a table of users. At the top of the table is a button labeled '3 New User' (highlighted with a red box). The table columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The data in the table is as follows:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	1_User	u1	utkarsh2@vanshiv.com	Operator 1	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	2_User	u2	utkarsh3@vanshiv.com	Operator 2	<input checked="" type="checkbox"/>	operator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000rs8akej.muirgikjfxf1@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Edit	Technologies_Vanshiv	VTech	vehicledemo@vanshiv.com	System Administrator	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Edit	Teddy John	j_ted	utkarsh1@vanshiv.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager

The screenshot shows the 'User Edit' page. At the top, there are three buttons: 'Save', 'Save & New', and 'Cancel'. Below this is a section titled 'General Information' with a note: 'Required Information' (indicated by a red vertical bar). The form fields are grouped into two main sections, both highlighted with red boxes. The first group (labeled 4) includes: First Name ('Travel Approval'), Last Name ('manager'), Alias ('tmana'), Email ('[REDACTED]'), and Username ('[REDACTED]'). The second group (labeled 5) includes: Role ('<None Specified>'), User License ('Salesforce'), Profile ('Standard User'), Active (checkbox checked), Marketing User (checkbox unchecked), and Offline User (checkbox unchecked). A small blue info icon is next to the 'Profile' dropdown.

Title	<input type="text"/>	Knowledge User	<input type="checkbox"/>
Company	<input type="text"/>	Flow User	<input type="checkbox"/>
Department	<input type="text"/>	Service Cloud	

Use Customization

Customization refers to custom software development and coding to add robust features to your CRM platform. These features can be integrated with your business to have a scalable impact.

Customize Travel Approval Object Page Layout

1. From the Object Manager, search for the Travel approval object
2. click on page layouts and click Travel Approval Layout
3. Drag the Section from the top pane to the lower pane directly below the Information section. When dragging over the page, you get a visual indicator of where you can drop the new section.
4. Name the section Trip Info, leave the rest of the settings at their default values, and
5. Then click on OK.
6. Drag Trip Start Date and Trip End Date, Status from the top pane into the left-hand column of the Trip Info section.
7. Drag the Destination State and Purpose of a trip from, department the top pane into the right-hand column of the Trip Info section.
8. Click Save.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Travel Approval	Travel_Approval_c	Custom Object		06/04/2023	<input checked="" type="checkbox"/>

SETUP > OBJECT MANAGER

Travel Approval

Details
Details
Edit
Delete

Fields & Relationships
Description

Page Layouts **2**
API Name
Enable Reports

Lightning Record Pages
Travel_Approval__c
✓

Save **Quick Save** **Preview As...** **Cancel** **Undo** **Redo** **Layout Properties**

Fields	Field Name	Destination State	Purpose of Trip	Trip Start Date
+ Section				
+ Blank Space		Employee Name	Status	
Created By		Last Modified By	Travel Approval Name	
Department	Owner		Trip End Date	

Information (Header visible on edit only)

Travel Approval Name	GEN-2004-001234	Owner	<u>Sample Text</u>
Employee Name	<u>Sample Text</u>		
Department	<u>Sample Text</u>		
Destination State	<u>Sample Text</u>		
Purpose of Trip	<u>Sample Text</u>		
Trip Start Date	<u>07/04/2023</u>		
Trip End Date	<u>07/04/2023</u>		
Status	<u>Sample Text</u>		

System Information (Header visible on edit only)

Created By	<u>Sample Text</u>	Last Modified By	<u>Sample Text</u>
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Add Business Logic To Travel App

Validation Rule - It can contain a formula or expression that evaluates the data in one or more fields & returns a value of true or false. Validation Rules also include an error message to display to the user when the rule returns a value true due to an invalid value/data.

Create Validation Rule

Search for the travel approval object from the object manager and open the object.

- 1) Click on validation rules and click new on the left corner
- 2) Give your rule name Date _Validation and make sure that the rule is set to active.
- 3) In the error condition formula enter Trip_End_Date c < Trip_Start_Date c

NOTE- Make sure that there is no syntax error after you input this error condition

Give the Error message – “Trip end date must be the date greater than the Trip start date” & For error location select the field and pick the Trip end date as the location for error.

Click save

The screenshot shows the Salesforce Object Manager interface. At the top, there are navigation links: Setup, Home, and Object Manager. A search bar contains the text "travel". Below the search bar, a button labeled "Schema Builder" and a "Create" dropdown menu are visible. The main area is titled "Object Manager" and displays a table of objects. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. One row is shown, representing the "Travel Approval" object. The "LABEL" column value is "Travel Approval" (marked with a red box and a red number 1), the "API NAME" is "Travel_Approval__c", the "TYPE" is "Custom Object", the "DESCRIPTION" is blank, the "LAST MODIFIED" date is "06/04/2023", and the "DEPLOYED" status is checked. A small dropdown arrow is located at the bottom right of the table.

The screenshot shows the "Travel Approval" object details page. The left sidebar lists various configuration options: Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers (marked with a red box and a red number 2), and Validation Rules. The main content area is titled "Details". It includes fields for Description, API Name (set to "Travel_Approval__c"), Custom (checked), Singular Label (set to "Travel Approval"), Plural Label (set to "Travel Approvals"), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (set to "Deployed"), Help Settings, and Help Link (set to "Standard salesforce.com Help Window"). At the top right, there are "Edit" and "Delete" buttons.

The screenshot shows the "Validation Rule Edit" screen for the "Travel Approval" object. The top bar includes "Save", "Save & New", and "Cancel" buttons. The main form has a "Rule Name" field containing "Date_Validation" (marked with a red box and a red number 3). The "Active" checkbox is checked. There is also a "Description" field which is currently empty.

My Record Pages
Links, and Actions
Layouts
Sets
Limits
Types
Lookup Filters
Layouts
Your Button Layout

Error Condition Formula

Example: `Discount_Percent__c>0.30` More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area

Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
[Help on this function](#)

4
Trip_End_Date__c < Trip_Start_Date__c

Check Syntax No errors found

Error Message

Example: `Discount percent cannot exceed 30%`
This message will appear when Error Condition formula is true

5
Error Message: Trip end date must be the date greater than the Trip start date

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field **Trip End Date**

6 Save Save & New Cancel

Create Formulae Fields

Create Formula Fields

- 1) First, we need to upload a zip file to your Salesforce environment that contains all the images we use. You should have 2)a file titled StatusImages.zip.
- 3) Click the setup
- 4) Click Static Resources in Quick Find & Click New.
- 5) Enter the following values for your static resource

Parameter	Value
Name	StatusImages
File	StatusImages.zip
Cache-Control	Private

Now select the travel approval object.

Select Fields & Relationships, Click New

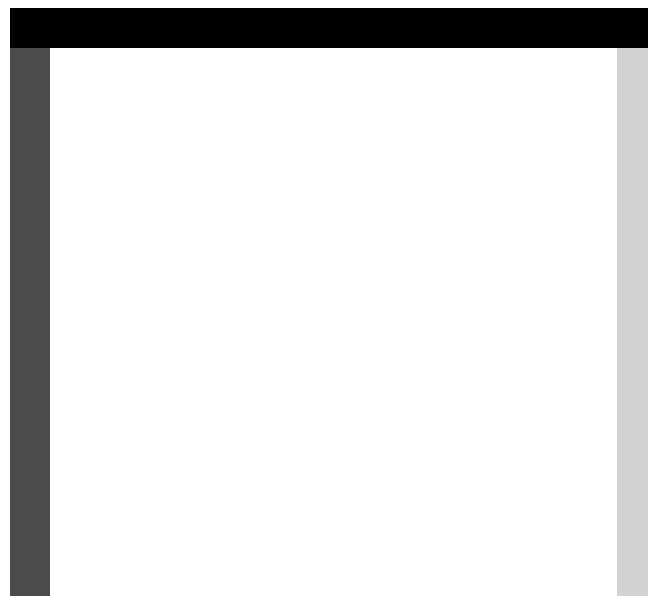
Select Formula data type, and Click Next.

Enter the following values:

Field Label: Status Indicator



Field Name: Status_Indicator (This automatically gets sent when you tab out of the Field Label field)

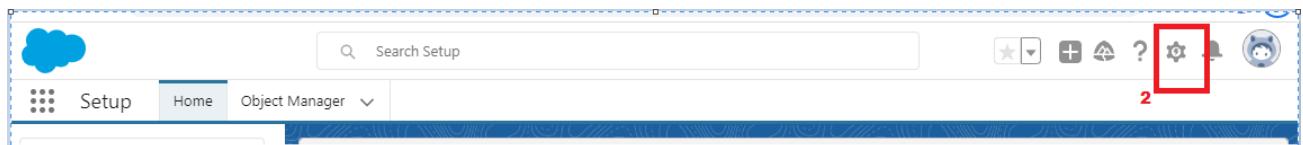


Formula Return Type: Tex

Click next & Copy and paste the following formula into the formula editor.

```
IF( ISPICKVAL( Status c c, 'Approved'), IMAGE("/resource/StatusImages/thumbs-up.png", "Accepted", 20, 20),  
IF( ISPICKVAL( Status c c, 'Rejected'), IMAGE("/resource/StatusImages/thumbs-down.png", "Rejected", 20, 20), IMAGE("/resource/StatusImages/draft.png", "In-Process", 20, 20)))
```

Click Next, Next, Save.



4

Name	StatusImages
Description	
File	<input type="file"/> Choose File No file chosen
Cache Control	Private <input type="button" value="i"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

5

Object Manager					
Label	API Name	Type	Description	Last Modified	Deployed
Travel Approval	Travel_Approval__c	Custom Object		06/04/2023	<input checked="" type="checkbox"/>

6

Fields & Relationships				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(50)		
Created By	CreatedBy	Lookup(User)		

7

Details	<input type="button" value="Next"/> <input type="button" value="Cancel"/>
Fields & Relationships	<p>Specify the type of information that the custom field will contain.</p> <p>Data Type</p> <p><input type="radio"/> None Selected Select one of the data types below.</p> <p><input checked="" type="radio"/> Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.</p> <p><input checked="" type="radio"/> 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.</p> <p><input type="radio"/> Roll-Up 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.</p> <p><input type="radio"/> 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.</p> <p><input type="radio"/> Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent,</p>

8

The screenshot shows the Salesforce formula editor interface. At the top, there are fields for 'Field Label' (Status Indicator) and 'Field Name' (Status_Indicator). A red box highlights these fields. Below them are checkboxes for 'Auto add to custom report type' and 'Add this field to existing custom report types that contain this entity'. The 'Formula Return Type' section follows, with a radio button selected for 'None Selected' and a note: 'Select one of the data types below.' Below this are four options: 'Checkbox' (Calculate a boolean value, example: TODAY() > CloseDate), 'Currency' (Calculate a dollar or other currency amount and automatically format the field as a currency amount, example: Gross Margin = Amount - Cost_c), and 'Date' (Calculate a date, for example, by adding or subtracting days to other dates). The bottom part of the editor shows an example formula: 'Example: Full Name = LastName & ", " & FirstName | More Examples...'. It includes tabs for 'Simple Formula' and 'Advanced Formula', and a code editor with syntax highlighting for the formula. A red box highlights the formula itself. To the right, a sidebar lists various functions like ABS, ACOS, ADDMONTH, AND, ASCII, ASIN, with an 'Insert Selected' button.

Example: [Full Name = LastName & ", " & FirstName](#) [More Examples...](#)

[Simple Formula](#) [Advanced Formula](#)

Status Indicator (Text) =

```
IF( ISPICKVAL( Status__c , 'Approved') , IMAGE("/resource/StatusImages/thumb-up.png", "Accepted", 20, 20),
IF( ISPICKVAL( Status__c , 'Rejected') , IMAGE("/resource/StatusImages/thumb-down.png", "Rejected", 20,
20), IMAGE("/resource/StatusImages/draft.png", "In-Process", 20, 20)))
```

9

Functions
-- All Functions
ABS
ACOS
ADDMONTH
AND
ASCII
ASIN
[Insert Selected](#)

User Adoption - Create Record

Create Record

Click App Launcher and select Travel Approval App

- 1) Click reports tab
- 2) Click New Report.
- 3) Click the report type as Travel approval with Departments Click Start report.
- 4) Customize your report, in group rows select - Department Name
- 5) Click refresh
- 6) Click save and run
- 7) Give report name – Travel Approval Report
- 8) Click Save

The screenshot shows the Salesforce Setup Home page. In the left sidebar, under 'Apps', the 'Travel Approval' app is highlighted with a red box and the number '1'. The main content area displays three decorative cards: a blue robot in a desert, a smartphone on a mountain peak, and a red circular icon in a jungle setting.

The screenshot shows the 'Travel Approval' application's reports section. The top navigation bar has a 'Reports' dropdown menu highlighted with a red box and the number '2'. Below it, there is a search bar for recent reports and buttons for 'New Report' and 'New Folder'. A red box with the number '3' highlights the 'New Report' button.

The screenshot shows the 'Create Report' page. On the left, there is a sidebar with categories like 'Recently Used', 'All', 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', and 'Leads'. The main area is titled 'Select a Report Type' and contains a search bar with 'depart' typed in. Below the search bar is a table with columns 'Report Type Name' and 'Category'. The table lists 'Departments' (Standard), 'Employee Details with Department' (Standard), and 'Travel Approvals with Department' (Standard). The 'Travel Approvals with Department' row is highlighted with a red box and the number '4'.

The screenshot shows the report preview for 'Travel Approvals with Department'. The top navigation bar includes 'REPORT', 'New Report', and the report title. The preview area shows a table with four rows of data. The left sidebar has 'Outline' and 'Filters' sections, with 'Groups' expanded. A red box with the number '5' highlights the 'Add group...' button under 'GROUP ROWS'. A red box with the number '6' highlights the 'Refresh' button with a warning message: 'To see the latest edits, refresh the preview'. A red box with the number '7' highlights the 'Save & Run' button. The bottom right corner has a toggle for 'Update Preview Automatically'.

	Travel Approval: Travel Approval Name	Department: Department Name
1	T-001	Computer Science
2	T-003	Office of Communications and Media
3	T-004	Disability Determination Bureau
4	T-002	Computer Science

Save Report

8

* Report Name

Travel Approval Report

Report Unique Name i

New_Report_iUr

Report Description

9

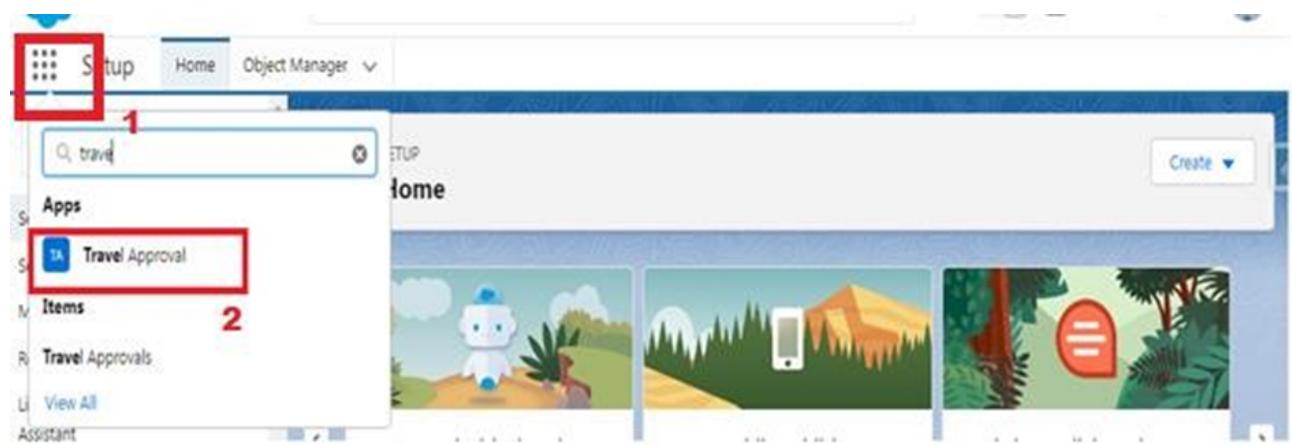
Cancel

Save

View Record

View Record (Department):

- 1.Click on App Launcher on left side of screen.
- 2.Search Travel Approval & click on it.
- 3.Click on Department Tab.
- 4.Click on any record name. you can see the details of the Department



The screenshot shows the Salesforce interface with the 'Travel Approval' app selected in the top-left corner. A red box highlights the 'Departments' tab in the top navigation bar. Below it, a red box highlights the 'Recently Viewed' section, which lists '7 items • Updated a few seconds ago'. The main content area displays a table titled 'Department Name' with 7 rows, each containing a checkbox and a department name: Computer Science, Technology, Division of Disability and Rehabilitative Services, Disability Determination Bureau, Office of Communications and Media, Technical, and HR. A red box highlights the entire list of departments. The top right of the screen includes buttons for 'New', 'Import', and 'Change Owner', along with a search bar and various filter icons.

	Department Name	
1	Computer Science	
2	Technology	
3	Division of Disability and Rehabilitative Services	
4	Disability Determination Bureau	
5	Office of Communications and Media	
6	Technical	
7	HR	

Delete Record

Delete Record (Department):

1. Click on App Launcher on the left side of the screen.
2. Search Travel Approval & click on it.
3. Click on Department Tab.
4. Click on Arrow at the right-hand side on that particular record.
5. Click delete and delete again.

The screenshot shows the Salesforce App Launcher. A red box highlights the 'Setup' icon in the top-left corner. Below it, a red box highlights the 'Travel Approval' app icon in the 'Items' section. The launcher also includes sections for 'Travel Approvals' and 'View All Assistant'. The main workspace shows a 'Home' dashboard with three cards: a white elephant icon, a smartphone icon, and a red speech bubble icon. The top navigation bar includes 'Home', 'Object Manager', and a search bar with the text 'travel'.

The screenshot shows the Salesforce interface with a blue header bar. In the top left, there's a cloud icon and the text 'Travel Approval'. Along the top are navigation links: 'Departments', 'Employee Details', 'Expenses', 'Expense Items', 'Reports', 'Dashboards', and 'Travel Approvals'. On the far right of the header are icons for star, plus, question mark, gear, and bell. Below the header is a search bar with placeholder 'Search...'. The main content area has a title 'Departments' with a blue diamond icon, followed by 'Recently Viewed' and a refresh button. A red box highlights the 'Departments' link. To the right are buttons for 'New', 'Import', and 'Change Owner'. Below this is a sub-header with '7 items • Updated 2 minutes ago' and a search bar 'Search this list...' with filter icons. The main list contains 7 items, each with a checkbox and a number (1-7) next to it. The last item, 'HR', has a red box around its number '7'. The list includes: 1 Computer Science, 2 Technology, 3 Division of Disability and Rehabilitative Services, 4 Disability Determination Bureau, 5 Office of Communications and Media, 6 Technical, and 7 HR. Each item has a small downward arrow icon to its right.

What Are Reports?

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

1.Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

2.Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

3.Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

4.Joined Reports:

These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a subreport with its own fields, columns, sorting, and

filtering. They are used to group and show data from multiple report types in different views.

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

- A report type cannot include more than 4 objects.
- Once a report is created its report type cannot be changed.

There are 2 types of report types:

1.Standard Report Types:

Standard Report Types are automatically included with standard objects and also with custom objects where “Allow Reports” is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

2.Custom Report Types:

Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1.Viewer:

With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

2.Editor:

With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

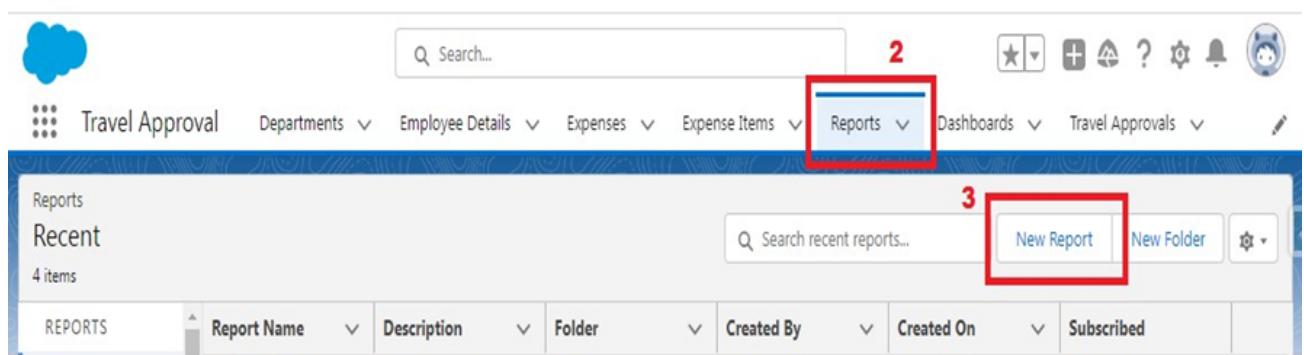
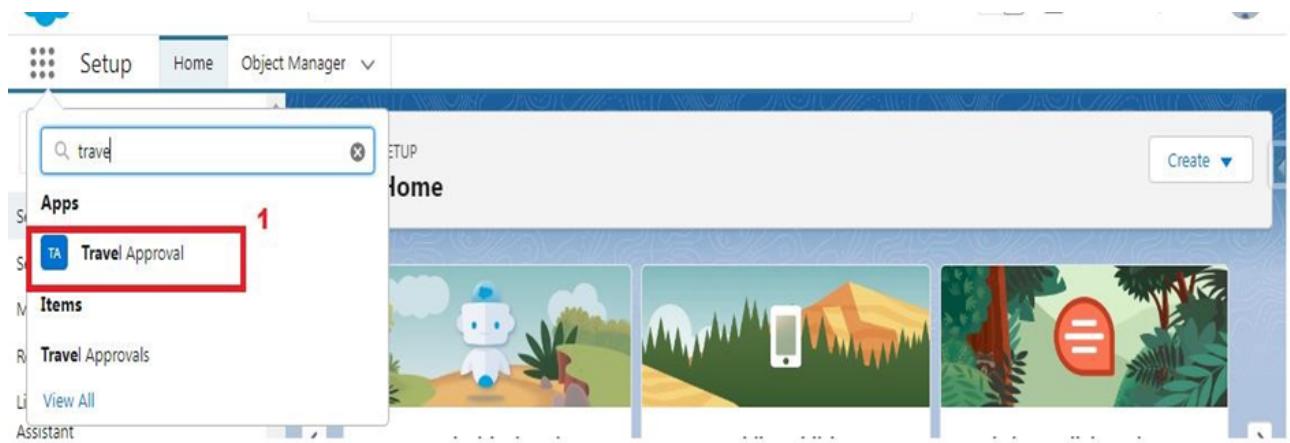
3.Manager:

With this access level, users can do everything Viewers & Editors can do, plus they can also control other user’s access levels to this folder. Also, users with Manager Access levels can delete the report. From this milestone we are going to import the data and create the reports and dashboards for data

visualization in the application

Create Report

1. Click App Launcher and select Travel Approval App
2. Click reports tab
3. Click New Report.
4. Click the report type as Travel Approval with Departments Click Start Report.
5. Customize your report, in group rows select - Department Name
6. Click Refresh
7. Click save and run
8. Give report name – Travel Approval Report
9. Click Save



Create Report

Category

Recently Used

All

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads

Select a Report Type

Report Type Name

Category

Report Type Name	Category
Departments	Standard
Employee Details with Department	Standard
Travel Approvals with Department	Standard

4

The 'Travel Approvals with Department' report type is highlighted with a red box.

View Report

- 1.Click on App Launcher on left side of screen.
- 2.Search Travel Approval App & click on it.
- 3.Click on Reports Tab.
- 4.Click on Travel Approval Report and see records.

The screenshot shows the Salesforce interface with several numbered callouts:

1. A red box highlights the 'Setup' icon in the top-left corner of the app launcher.
2. A red box highlights the 'Travel Approval' app in the search results of the app launcher.
3. A red box highlights the 'Reports' tab in the navigation bar at the bottom of the screen.
4. A red box highlights the 'Travel Approvals with Department' report type in the 'Select a Report Type' dropdown menu.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Properties with Customer Name Report		Private Reports		8/4/2023, 12:48 pm	
Created by Me	Events with Attendees		Private Reports		6/4/2023, 4:35 pm	
Private Reports	Candidate Internal Result Report		Private Reports		9/4/2023, 7:57 pm	
Public Reports	job application with candidate name		Private Reports		8/4/2023, 7:08 pm	
All Reports	Travel Approval Report		Private Reports		8/4/2023, 12:56 pm	
FOLDERS	New Departments Report		Private Reports		8/4/2023, 12:17 pm	
All Folders						

Dashboards

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

Create Dashboard

Click on the Dashboards tab from the travel approval application,

Click on a new dashboard

Give name- Travel Approval

Click Create

Give your dashboard a name and click on +component,

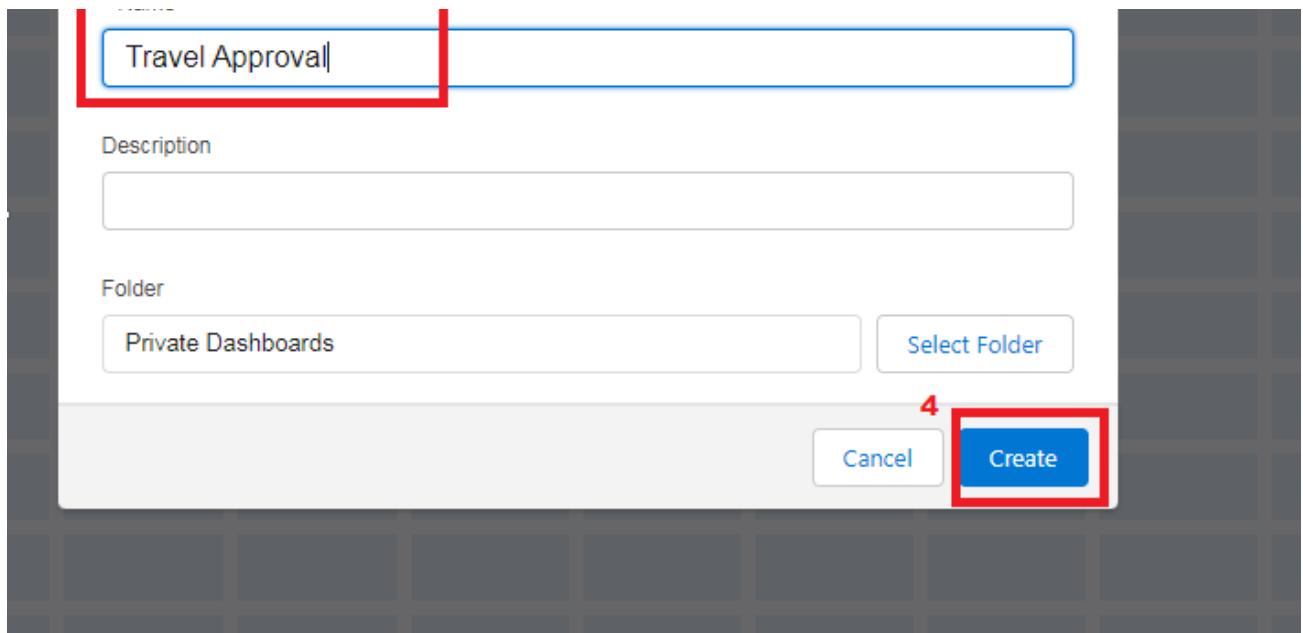
select the Travel Approval Report that you created.

For the data visualization select any of the chart, table etc as your wish.

Click add

Click save.

The screenshot shows the Travel Approval application interface. At the top, there is a navigation bar with various tabs: Travel Approval, Departments, Employee Details, Expenses, Expense Items, Reports, Dashboards (which is highlighted with a red box labeled 1), and Travel Approvals. Below the navigation bar, there is a search bar labeled "Search recent dashboards..." and buttons for "New Dashboard" (highlighted with a red box labeled 2) and "New Folder". A modal window titled "New Dashboard" is open in the foreground. Inside the modal, there is a field labeled "* Name" (highlighted with a red box labeled 3). The background shows a dark grid pattern.



A screenshot of the main travel approval dashboard. The top navigation bar includes links for "Departments", "Employee Details", "Expenses", "Expense Items", "Reports", "Dashboards", and "Travel Approvals". The main content area shows a table titled "Employee Travel detail". To the right of the table is a toolbar with various icons. A blue button labeled "+ Component" is highlighted with a red box and a red number "5" above it.

A screenshot of a "Select Report" dialog box. On the left, a sidebar shows categories: "Reports" (selected), "Recent" (underlined), "Created by Me", "Private Reports", and "Public Reports". The main area is titled "Select Report" and contains a search bar with the placeholder "Search Reports and Folders...". Below the search bar is a list of reports. The first item in the list is "Propertys with Customer Name Report" by "Vanshiv Technologies" on "08-Apr-2023, 12:48 pm · Private Reports". At the bottom of the list is "Travel Approval Report" by "Vanshiv Technologies" on "08-Apr-2023, 12:48 pm · Private Reports". The "Travel Approval Report" is highlighted with a red box and a red number "6" below it.

All Reports

vanshiv technologies · 08-Apr-2023, 12:00 pm · Private reports

New Departments Report
Vanshiv Technologies · 08-Apr-2023, 12:17 pm · Private Reports

Cancel Select

Add Component

Report

Travel Approval Report x

Use chart settings from report i

Display As

7

X-Axis

Department: Department Name

Preview

Travel Approval Report

Record Count

Department: Department Name

View Report (Travel Approval Report)

Cancel Add

Travel Approval

+ Component + Filter

Save Done

9

Travel Approval Report

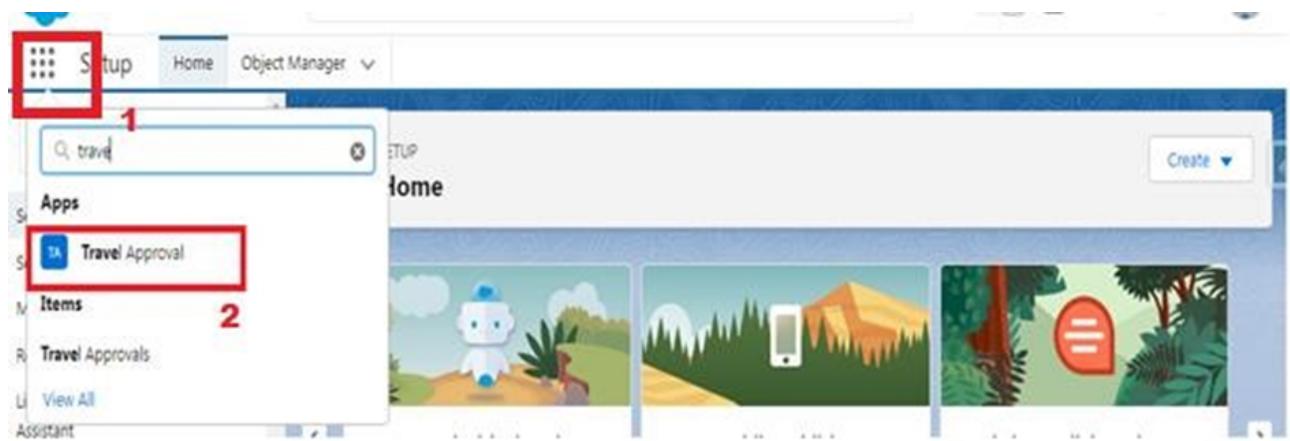
Record Count

Department: Department Name

View Report (Travel Approval Report)

View Dashboard

- 1.Click on App Launcher on left side of screen.
- 2.Search Travel Approval App & click on it.
- 3.Click on Dashboard Tab.
- 4.Click on Travel Approval and see graph view of records



This screenshot shows the 'Travel Approval' dashboard. At the top, there is a navigation bar with icons for search, favorite, new, help, settings, and notifications. A red box labeled '4' highlights the 'Dashboards' tab in the top right corner. Below the navigation bar, there are sections for 'Recent' dashboards and 'Folders'. The 'Recent' section lists four dashboards: 'Property with Customer Name Report', 'Job application wth candidate name', 'Events with Attendees', and 'Candidate Internal Result Card'. The 'Folders' section lists 'Created by Me', 'Private Dashboards', and 'All Dashboards'. A red box at the bottom highlights the 'Folders' tab.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Property with Customer Name Report		Private Dashboards		8/4/2023, 12:58 pm	
Created by Me	Job application wth candidate name		Private Dashboards		7/4/2023, 7:14 pm	
Private Dashboards	Events with Attendees		Private Dashboards		6/4/2023, 5:23 pm	
All Dashboards	Candidate Internal Result Card		Private Dashboards		9/4/2023, 8:00 pm	

All Folders

Created by Me

Shared with Me

Travel Approval	Private Dashboards	8/4/2023, 12:58 pm	
Employee Travel detail	Private Dashboards	8/4/2023, 12:22 pm	
Opportunity And Dashboard	Private Dashboards	4/4/2023, 1:55 am	