

# **BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES**

Submitted by

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M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN  
DINDIGUL – 624 001.**

# INTRODUCTION

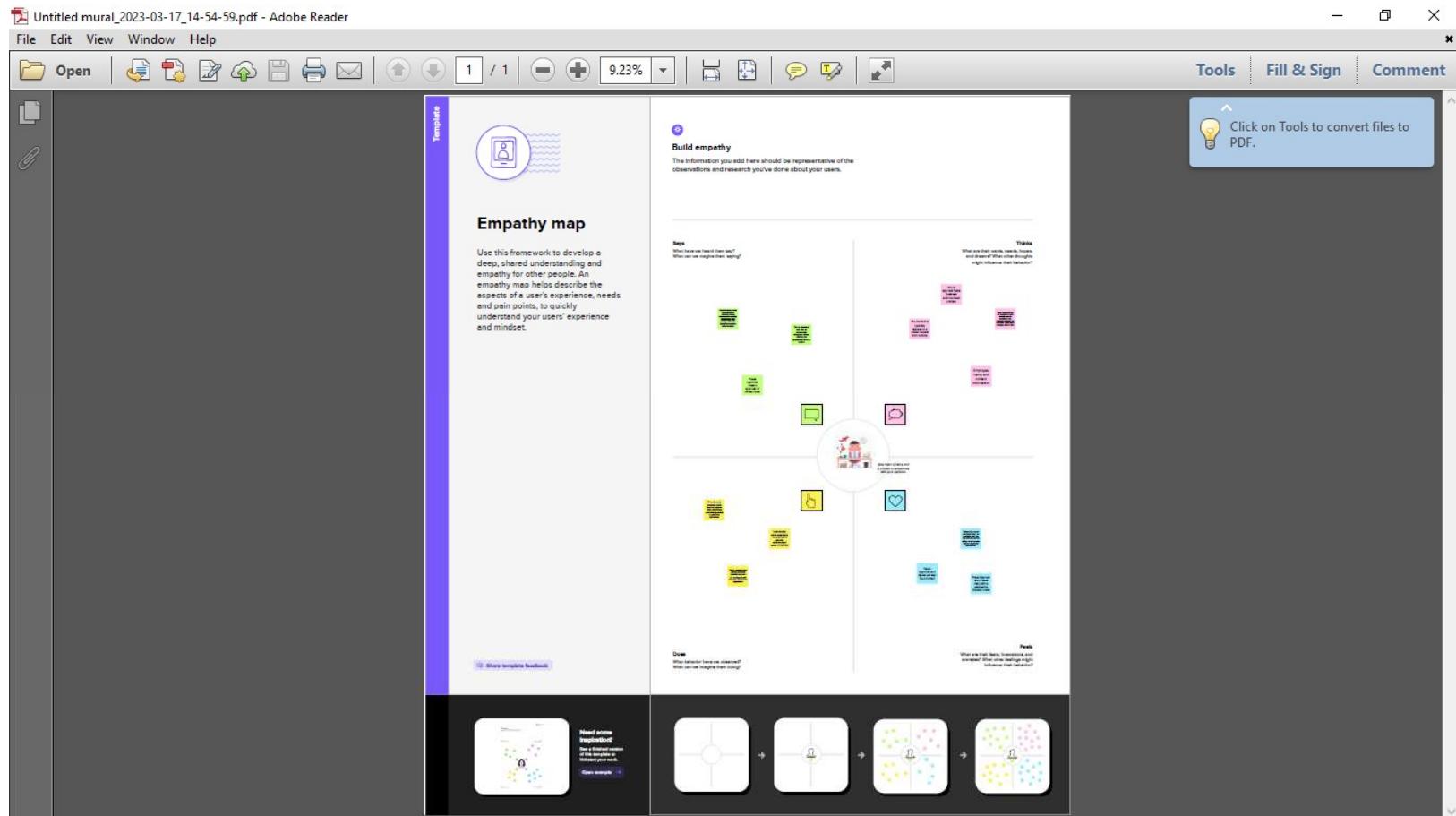
## **Salesforce:**

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

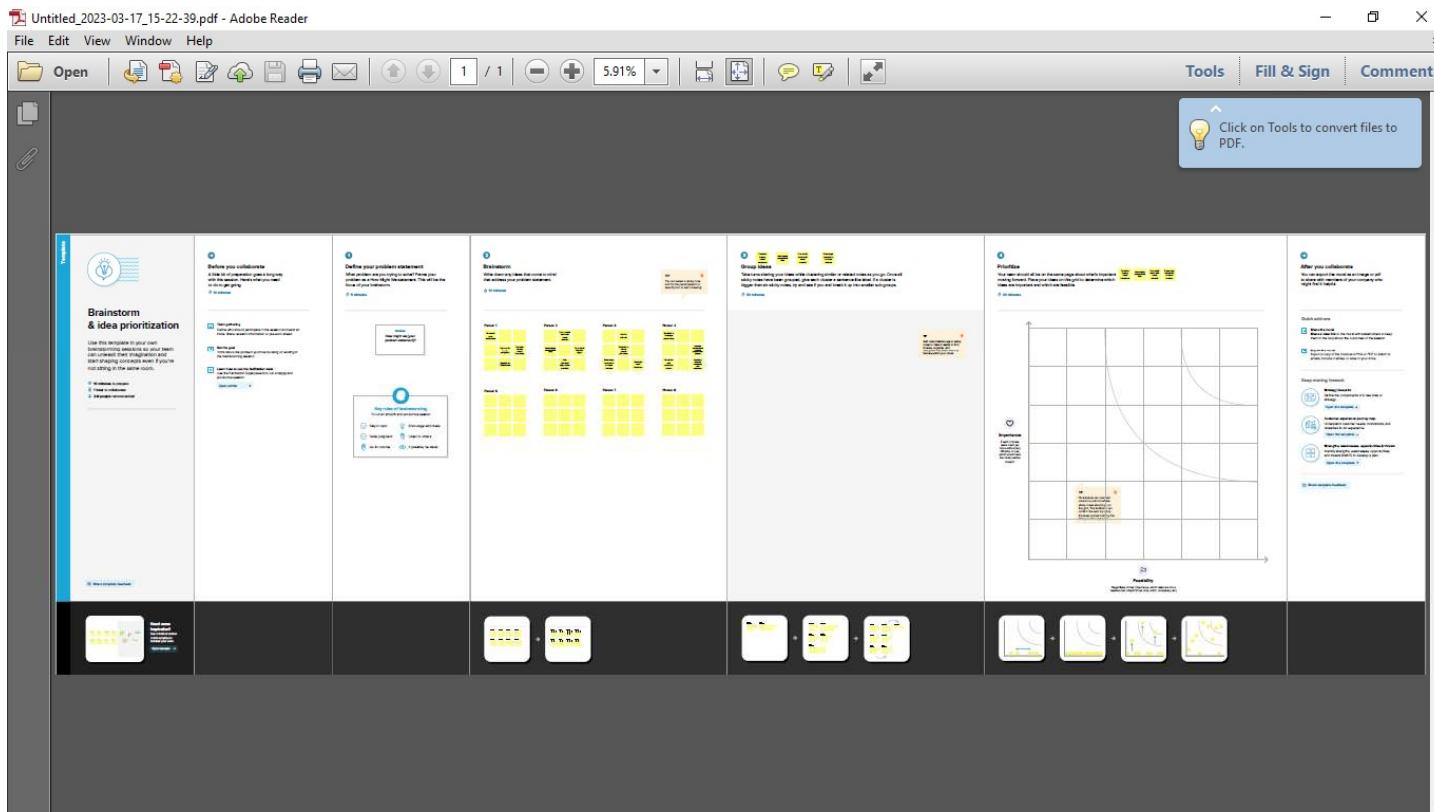
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.



# EMPATHY MAP



# IDEATION AND BRAINSTORMING MAP



## **Creating Developer Account**

Creating a developer org in salesforce.

- ❖ Go to [developers.salesforce.com/](https://developer.salesforce.com/)
- ❖ Click on sign up.
- ❖ On the sign-up form, enter the following details: 1. First name & Last name  
,Email
- ❖ Role: Developer
- ❖ Company: College Name
- ❖ County: India
- ❖ Postal Code: pin code
- ❖ Username: should be a combination of your name and company

This need not be an actual email id, you can give anything in the format:

**username@organization.com**



salesforce developer - Google Search

Google search results for "salesforce developer". The top result is the official Salesforce Developers Portal.

**Sales Force**  
<https://developer.salesforce.com>

**Salesforce Developers: Developer Portal**  
Learn to build mobile and enterprise apps in the cloud with the [Salesforce Developers Portal](#). You've visited this page many times. Last visit: 10/4/23

**Developer Edition Signup**  
Sign up to get your very own Developer Edition for free to ...

**Developer career path on ...**  
What is a Salesforce Developer? Salesforce Developers build ...

**Salesforce Developer Jobs in ...**  
A Salesforce Developer is someone who builds apps on ...

**Developer Centers**  
Find developer resources and tools for building apps with ...

[More results from salesforce.com »](#)

**People also ask :**

Salesforce Inc. Software company

Salesforce, Inc. is an American cloud-based software company headquartered in San Francisco, California. It provides customer relationship management software and applications focused on sales, customer service, marketing automation, e-commerce, analytics, and application development. [Wikipedia](#)

**Founded:** February 1999, California, United States  
**Customer service:** 000 800 001 6000  
**Subsidiaries:** Salesforce Marketing Cloud, Tableau Software, MORE  
**Headquarters:** San Francisco, California, United States

Welcome to Salesforce: Verify your account

Gmail YouTube Maps

**Inbox**

Compose

Search in mail

to me

**Thanks for signing up with Salesforce!**

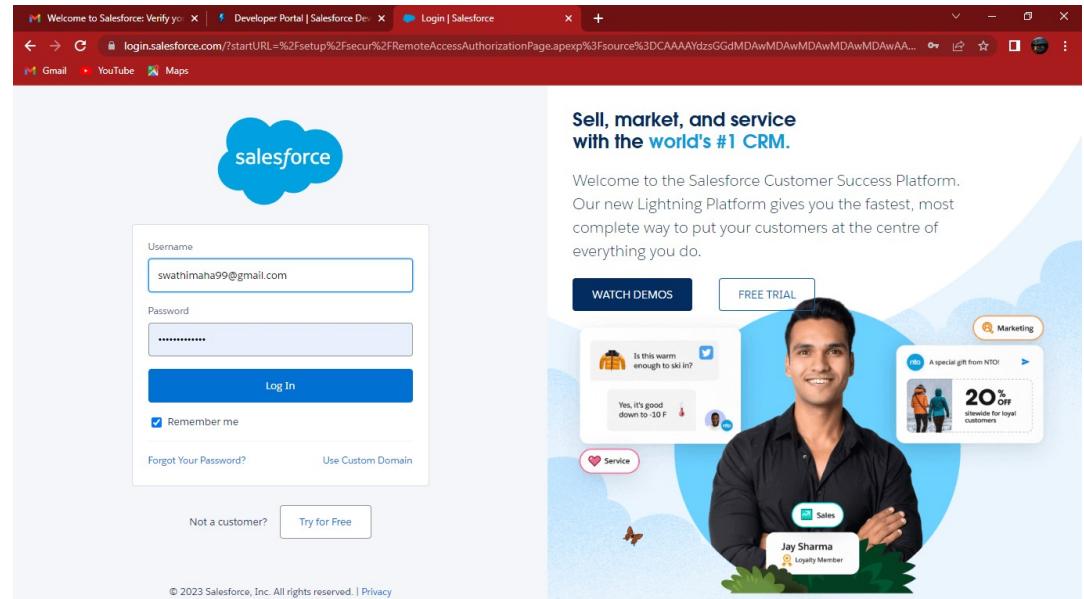
Click below to verify your account.

**Verify Account**

To easily log in later, save this URL:  
<https://mymuthiahgovernmentartsc-1a-dev-ed.develop.my.salesforce.com>

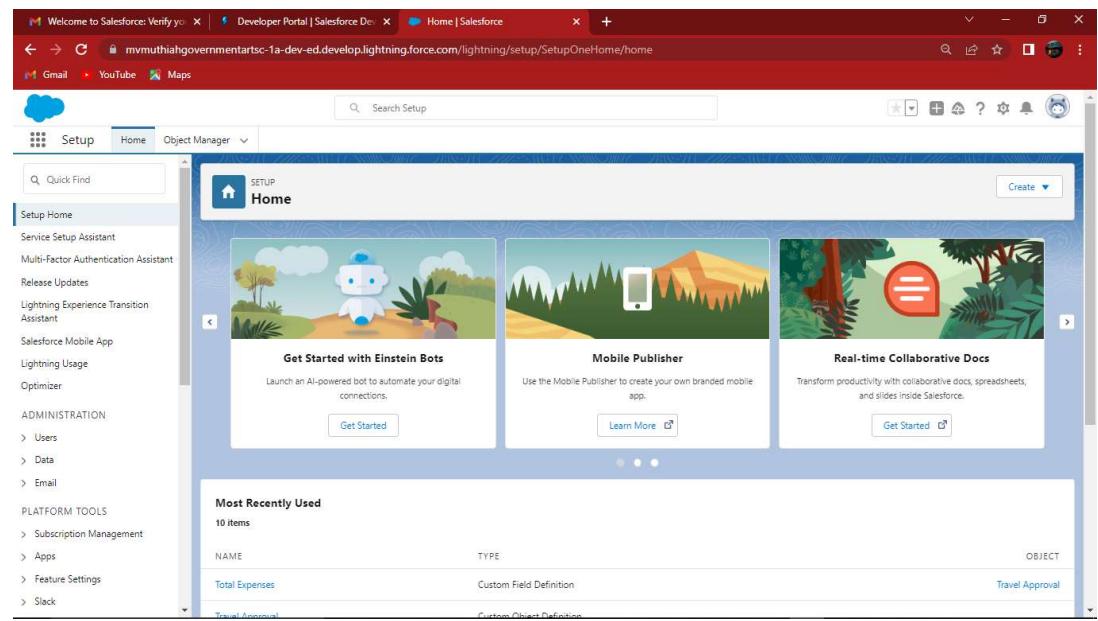
## Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as .



## Login To Your Salesforce Account

- 1.Go to salesforce.com and click on login.
- 2.Enter the username and password that you just created.
- 3.After login this is the home page which you will see.



# CREATE THE APPLICATION

The App Manager is your go to place for managing apps for lightning experience. It shows all your connected apps and salesforce apps. Use the lightning experience app manager to view all your salesforce apps.

## Creating Travel Application

- ❖ From Setup, enter App Manager in the Quick Find and select App Manager.
- ❖ Click New Lightning App. Enter Travel Approval as the App Name, then click Next
- ❖ Under App Options, leave the default selections and click Next.
- ❖ Under Utility Items, leave as is and click Next.
- ❖ From Available Items, select Department, Travel Approval, Expense Item, Reports, and Dashboards and move them to Selected Items. Click Next.
- ❖ From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish



Developer Portal | Salesforce Dev x Travel Approval - Lightning App x +

mvmuthiahgovernmentartsc-1a-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w0000043ho9AAA&retUrl=https%3A%2F%2Fmvmuthiahgove...

Gmail YouTube Maps

Lightning App Builder App Settings App Details & Branding Travel Approval ? Help

**App Settings**

**App Details & Branding**

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

**App Details & Branding**

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

**App Details**

\* App Name ⓘ Travel Approval

\* Developer Name ⓘ Travel\_Approval

Description ⓘ Enter a description...

**App Branding**

Image ⓘ  Primary Color Hex Value ⓘ #0070D2

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

**App Launcher Preview**



# CREATING 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).

## Creating the three objects

- Departments
- Expense Items
- Travel Approval

## Creating department object

- ❖ From setup click object manager
- ❖ Click create, then select custom object
- ❖ Give the name as Department
- ❖ Enter the label name, plural label name, click on Allow reports then save



Developer Portal | Salesforce Dev x Department | Salesforce x

mvmutiahgovernmentarts-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003EPXq/Details/view

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Department

**Details**

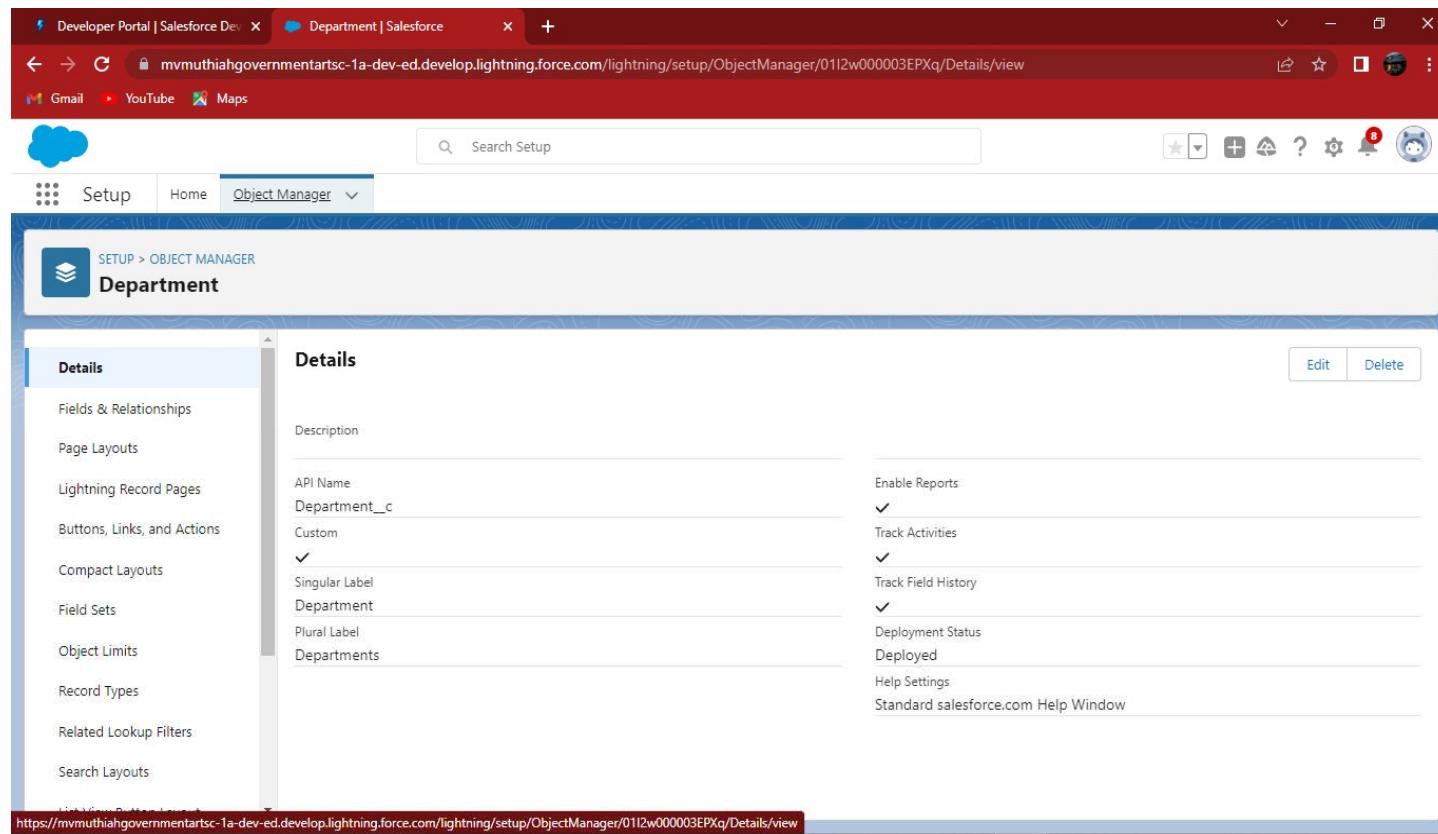
Description

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

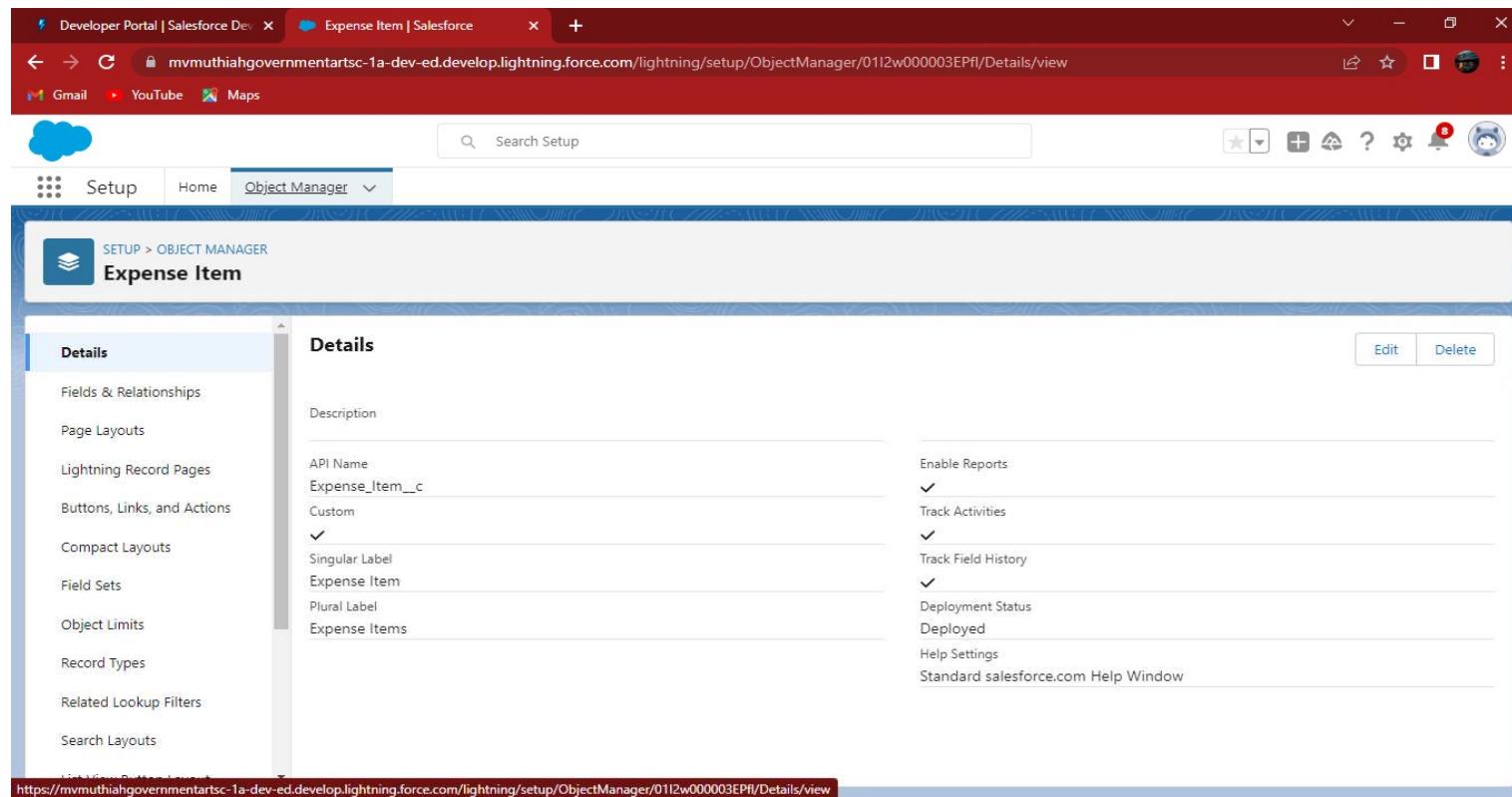
Edit Delete

<https://mvmutiahgovernmentarts-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003EPXq/Details/view>



## CREATING EXPENSE ITEMS OBJECT:

- ❖ From setup click object manager
- ❖ Click create, then select custom object
- ❖ Give the name as Expense Items
- ❖ Enter the label name, plural label name, click on Allow reports then save



## CREATE TRAVEL APPROVAL OBJECT

- ❖ From setup click object manager
- ❖ Click create, then select custom object

PARAMETER	VALUE
Label	Travel Approval
Plural label	Travel Approvals
Object name	Travel_Approval
Record name	Travel_Approval #
Data type	Auto Number
Display format	TA-{00000}
Starting Number	1



Developer Portal | Salesforce Dev X Travel Approval | Salesforce X

mvmuthiahgovernmentartsc-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003EPfH/Details/view

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Setup Home Object Manager

SETUP > OBJECT MANAGER

## Travel Approval

**Details**

Fields & Relationships	Description	Enable Reports
Page Layouts		✓
Lightning Record Pages	API Name	Track Activities
Buttons, Links, and Actions	TravelApproval_c	Track Field History
Compact Layouts	Custom	✓
Field Sets	Singular Label	Deployment Status
Object Limits	Travel Approval	Deployed
Record Types	Plural Label	Help Settings
Related Lookup Filters	Travel Approvals	Standard salesforce.com Help Window
Search Layouts		

https://mvmuthiahgovernmentartsc-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003EPfH/Details/view

# CREATING 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

## Creating the three tabs:

- Departments
- Expense Items
- Travel Approval

## STEPS

- ❖ In quick find search tabs
- ❖ From object select event
- ❖ For tab style ,select any icon
- ❖ Leave defaults as is,click next,next and save.



Developer Portal | Salesforce Dev X Tabs | Salesforce

mvmuthiahgovernmentartsc-1a-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

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Search Setup

Setup Home Object Manager

tab

User Interface

- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs**

Help for this Page

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit   Del	Departments	Laptop	
Edit   Del	Expense Items	Credit card	
Edit   Del	Travel Approvals	Car	

Web Tabs

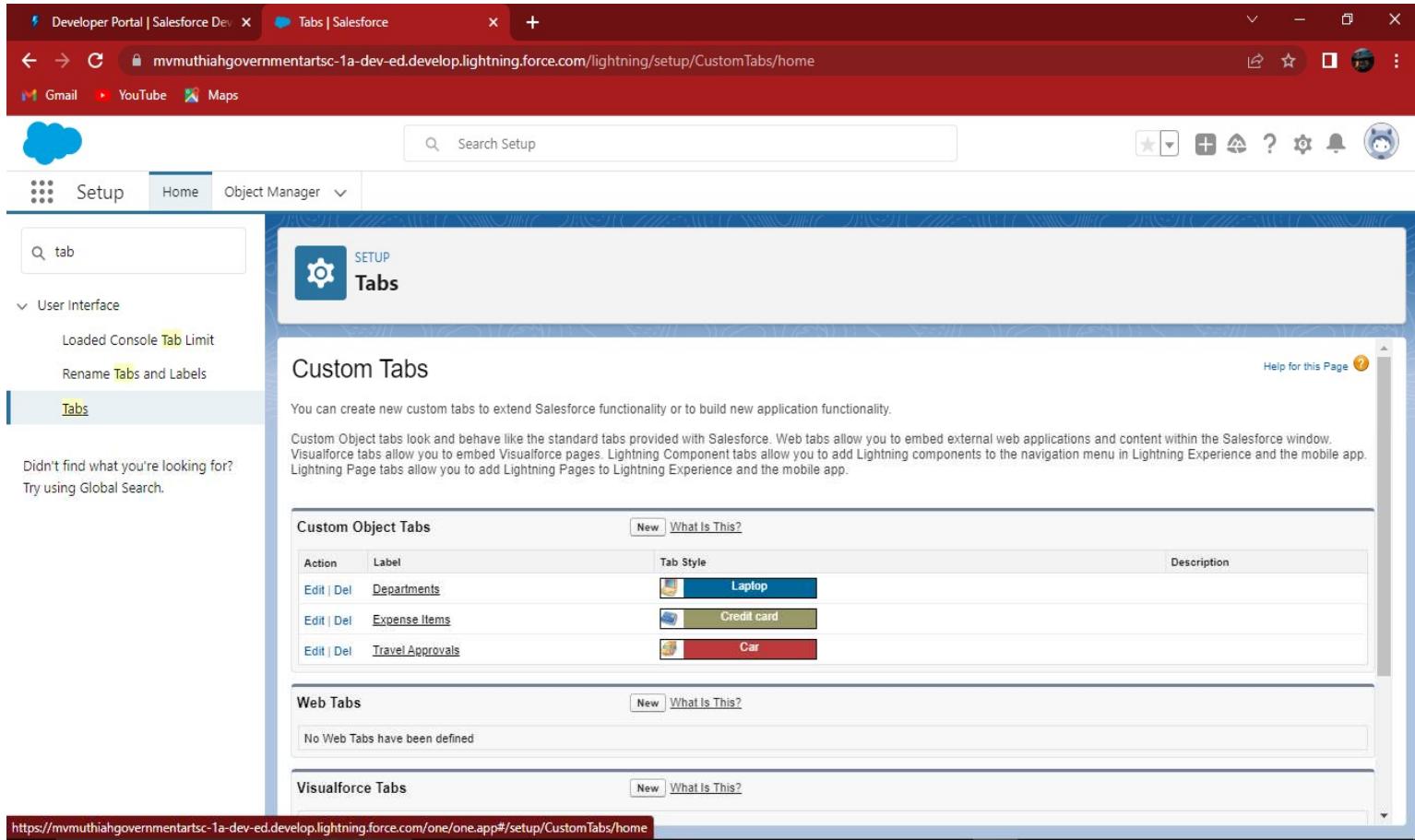
New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

<https://mvmuthiahgovernmentartsc-1a-dev-ed.develop.lightning.force.com/one/one.app#/setup/CustomTabs/home>



# CREATE FIELDS AND RELATIONSHIPS

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

## Create the Department field:

- ❖ Click fields and relationship and click new.
- ❖ For data type, select Currency.
- ❖ Enter these details.
  - a. For Field Label, enter Amount
  - b. For Length, enter 16
  - c. For Decimal places, enter 2
  - d. Select Required
- ❖ Click next, next then save.



Developer Portal | Salesforce Dev x Department | Salesforce x +

mvmuthiahgovernmentarts-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003EPXq/FieldsAndRelationships/view

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Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Department

Details Fields & Relationships

Fields & Relationships 6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Department	Department__c	Lookup(Department)	✓	
Department Name	Name	Text(80)	✓	
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

## Create Expense Items field:

- ❖ Select Enter values, with each value separated by a new line.
- ❖ Add these values:(Airfare, Hotel, RentalCars, Meals,Others)
- ❖ Select Picklist as the data type.
- ❖ Select Required. Click Next, Next, then Save & New.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Developer Portal, Expense Item, Gmail, YouTube, and Maps. The main header displays the current page as 'SETUP > OBJECT MANAGER' under 'Expense Item'. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The central content area is titled 'Fields & Relationships' and shows a table of fields for the Expense Item object. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The listed fields are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Picklist		
Created By	CreatedById	Lookup(User)		
Expense Item Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

## Create Travel Approval field:

- ❖ Select Master-Detail relationship as data type, click next.
- ❖ Select Travel Approval from Related to menu
- ❖ Click next four times and save.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The main title is 'Travel Approval'. On the left, there's a sidebar with various options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area is titled 'Fields & Relationships' and lists 9 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The 'Travel Approval' field is highlighted, showing it has a Master-Detail relationship with the 'Travel Approval' object itself. Other fields listed include Created By, Department, Destination State, Last Modified By, Out of State, and several date/time fields.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department	Department_c	Lookup(Department)		✓
Destination State	Destination_State__c	Text(2)		
Last Modified By	LastModifiedById	Lookup(User)		
Out of State	Out_of_State__c	Checkbox		
Travel Approval	Travel_Approval__c	Master-Detail(Travel Approval)		✓
Travel Approval Name	Name	Text(80)		✓
Trip End Date	Trip_End_Date__c	Date		
Trip Start Date	Trip_Start_Date__c	Date		

# CREATING IMPORT DEPARTMENTS

In order to complete this milestone, you need to download the reference file

[https://developer.salesforce.com/files/TravelAppWorkshopFiles.zip?  
\\_ga=2.108173638.597564088.1674441525-733189446.1673935386](https://developer.salesforce.com/files/TravelAppWorkshopFiles.zip?_ga=2.108173638.597564088.1674441525-733189446.1673935386)

## STEPS

- ❖ In quick find enter Data Import and select Data Import Wizard.
- ❖ Click Launch Wizard
- ❖ Click custom object tab and select the Department object.
- ❖ Next select Add new records.
- ❖ Drag and drop Departments.csv. Select next.
- ❖ Click start import. Click OK on the popup.

Home | Salesforce    Recently Viewed | Departments

mvmuthiahgovernmentarts-1a-dev-ed.lightning.force.com/lightning/setup/AsyncApiJobStatus/page?address=%2F7502w00000PLYrvAAH

Gmail YouTube Maps

SETUP Bulk Data Load Jobs

Bulk Data Load Job 7502w00000PLYrv

View the details of a bulk data load job.

Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail

Job ID	7502w00000PLYrv	Job Type	Bulk V1	Status	Closed
Submitted By	Swathi Surendra	Operation	Insert	Total Processing Time (ms)	205
Start Time	27/03/2023, 3:30 pm IST	Queued Batches	0	API Active Processing Time (ms)	155
End Time	27/03/2023, 3:30 pm IST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (hh:mm:ss)	00:02	Completed Batches	1		
Object	Department	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	16		
Concurrency Mode	Parallel	Records Failed	0		
API Version	57.0	Retries	0		

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	Status Message	Status
<a href="#">View Request</a>	<a href="#">View Result</a>	7512w00000V3Lqx	27/03/2023, 3:30 pm	27/03/2023, 3:30 pm	205	155	0	16	0	0	Completed	

# CUSTOMIZE USER INTERFACE

## Create User and Setup Approvals:

- ❖ Enter users in quick find and select users.
- ❖ Click new user.
- ❖ Give name as your wish and enter the real email
- ❖ For user name field follow the following instructions
  - Firstname.<yourlastname>@<yourcompany>.com
  - ...or create a username of your choice that should be unique
- ❖ Give role as CEO, Profile as System Administrator and license as Salesforce.
- ❖ Select your user account in the list, click save.

Developer Portal | Salesforce Dev X Users | Salesforce

mvmuthiahgovernmentartsc-1a-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Gmail YouTube Maps

Cloud Search Setup

Setup Home Object Manager

Roles User Management Settings Users

Data Email

PLATFORM TOOLS

Subscription Management Apps Feature Settings Slack MuleSoft Einstein Objects and Fields

Object Manager Picklist Value Sets Schema Builder

SETUP Users

All Users Help for this Page

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	<a href="#">Edit</a> Chatter Expert	Chatter	chatty.00d2w00000rjuzea5.vfaateusxwde@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	<a href="#">Edit</a> Suresh_Swathi	SSure	swathimaha99@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	<a href="#">Edit</a> Suresh_Swathi	Swathi	swathi.suresh@salesforce.com	CEO	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	<a href="#">Edit</a> User_Integration	integ	integration@00d2w00000rjuzea5.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	<a href="#">Edit</a> User_Security	sec	insightssecurity@00d2w00000rjuzea5.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

# 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.

- ❖ From the object manager, select travel approval object then click page layouts and click edit.
  - ❖ Drag section from the top panel to down panel to the information section.
  - ❖ Name the section as Trip Info leave the defaults and click ok
  - ❖ Drag Trip Start Date and Trip End Date from the top panel to the left hand side of Trip Info section
  - ❖ Drag Out of State, Departments and Destination State from the top panel to right hand side of Trip Info section
  - ❖ Click save
- 

Chat with mentor | Developer Portal | Salesforce Dev | Travel Approval | Salesforce

mvmuthiahgovernmentartsc-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003zyY0/PageLayouts/00h2w00000LRLDXAA5/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 List View Button Layout Restriction Rules Scoring Rules

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

Fields

Section	Destination State	Travel Approval Name
Blank Space	Last Modified By	Trip End Date
Created By	Out of State	Trip Start Date
Department	Travel Approval	

Quick Find Field Name

Travel Approval Detail

Standard Buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Custom Buttons

Trip Info

Trip Start Date	07/04/2023	Out of State	✓
Trip End Date	07/04/2023	Destination State	Sample Text
		Department	Sample Text

Information (Header visible on edit only)

★ ● Travel Approval Name	Sample Text
★ ● Travel Approval	Sample Text

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-------------	------------------	-------------

Search Setup

Object Manager

Travel Approval Detail

Standard Buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Custom Buttons

Trip Info

Trip Start Date	07/04/2023	Out of State	✓
Trip End Date	07/04/2023	Destination State	Sample Text
		Department	Sample Text

Information (Header visible on edit only)

★ ● Travel Approval Name	Sample Text
★ ● Travel Approval	Sample Text

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-------------	------------------	-------------

# ADD BUSINESS LOGIC TO TRAVEL APP

## Create Validation Rule:

- ❖ Search for the travel approval object from the object manager and open the object.
- ❖ Click on validation rules and give your rule a name and make sure that the rule is set to active.
- ❖ In the error condition formula enter `Trip_End_Date__c < Trip_Start_Date__c`.
- ❖ For error location select field and pick trip end date as the location for error

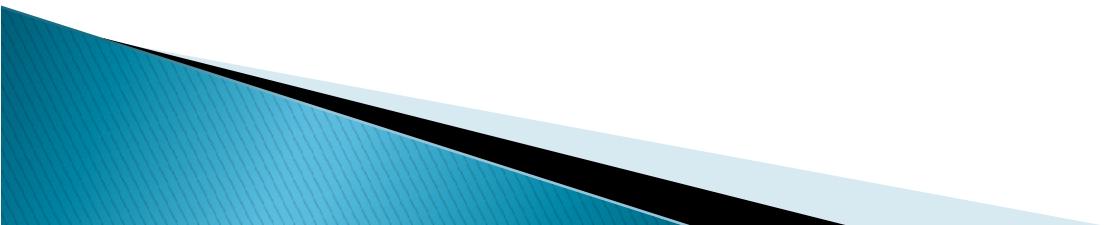
The screenshot shows a browser window with three tabs: 'Chat with mentor', 'Developer Portal | Salesforce Dev', and 'Object Manager | Salesforce'. The 'Object Manager' tab is active, displaying the URL `mvvmuthiahgovernmentarts-1a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03d2w000000K48R`. Below the tabs is a navigation bar with icons for Chat, Home, and Object Manager. The main content area is titled 'Object Manager' and shows a 'Travel Approval Validation Rule'. The rule details are as follows:

Validation Rule Detail	
Rule Name	Travel_Approval_rules
Error Condition Formula	<code>Trip_End_Date__c &lt; Trip_Start_Date__c</code>
Error Message	Enter the Validation Trip end date
Description	
Created By	Swathi Suresh 07/04/2023, 10:58 am
Modified By	Swathi Suresh 07/04/2023, 10:58 am

Buttons for 'Edit' and 'Clone' are located at the bottom of the detail section. A 'Help for this Page' link is also present in the top right corner.

## **Create Roll up Summary:**

- ❖ From the Travel Approval object, select Fields & Relationships. Click New.
- ❖ Select the Roll-Up Summary data type. Click Next.
- ❖ Enter the following values for the field details
  - o Field Label: Total Expenses
  - o Field Name: Total\_Expenses (this automatically gets set when you tab out of the Field Label field)
- ❖ Click Next.
- ❖ Configure the roll-up calculation.
  - o Summarized Object: Expense Items
  - o Roll-Up Type: SUM
  - o Field to Aggregate: Amount
  - o Filter Criteria: All records should be included in the calculation
- ❖ Click next, next and save.



Developer Portal | Salesforce Dev X Travel Approval | Salesforce X +

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Travel Approval

Details Fields & Relationships 5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total Expenses	Total_Expenses__c	Roll-Up Summary (MIN Travel Approval)		
TravelApproval Name	Name	Auto Number		✓

## **Create Formula Fields:**

- ❖ First, we need to upload a zip file to your Salesforce environment that contains all the images we use. You should have a file titled StatusImages.zip .
- ❖ Click the Home tab to navigate back to the main setup page.
- ❖ Click Custom Code | Static Resources (or enter Static in the Quick Find to filter down the options).
- ❖ Click New.
- ❖ Enter the following values for your static resource

PARAMETRE	VALUE
Name	StatusImages
File	StatusImages.zip
Cache control	Private

- ❖ Now select the travel approval object.
- ❖ Select Fields & Relationships.
- ❖ Click New
- ❖ Select Formula data type.
- ❖ Click Next.
- ❖ Enter the following values
  - Field label: Status Indicator
  - Field Name: Status\_Indicator
  - Formula Return Type: Text
- ❖ Click next.

Chat with mentor | Developer Portal | Salesforce Dev | Static Resources | Salesforce

mvmuthiahgovernmentartsc-1a-dev-ed.develop.lightning.force.com/lightning/setup/StaticResources/page?address=%2F0812w000001oryQ%3FsfclFrameOrigin%3Dht...

Gmail YouTube Maps

Cloud icon

Setup Home Object Manager

Search Setup

stat

Custom Code Static Resources

Didn't find what you're looking for?  
Try using Global Search.

SETUP Static Resources

Static Resource StatusImages

Help for this Page ?

Static Resource Detail

Name	StatusImages
Namespace Prefix	
Description	
MIME Type	application/x-zip-compressed
Cache Control	Private
Size	39,130 bytes
<a href="#">View file</a>	
Created By	Swathi Suresh, 07/04/2023, 11:15 am
Last Modified By	Swathi Suresh, 07/04/2023, 11:15 am

Edit Delete Where is this used?

# CREATE 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.

- ❖ Go to the app, click the reports tab
- ❖ Click new report
- ❖ Select report type from category or from report type panel or from search panel, click on start report.
- ❖ Customize the report then save or run it.



Developer Portal | Salesforce Dev X Dashboards | Salesforce X

mvmuthiahgovernmentarts-1a-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Gmail YouTube Maps

Search...

Travel Approval Departments Travel Approvals Expense Items Reports Dashboards Purpose of Trips

Dashboards Recent 3 items

Search recent dashboards... New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Expence Item Report		Private Dashboards	Swathi Suresh	6/4/2023, 10:44 pm	
Created by Me	New Travel Approval Report		Private Dashboards	Swathi Suresh	6/4/2023, 10:43 pm	
Private Dashboards	New Department Report		Private Dashboards	Swathi Suresh	6/4/2023, 10:39 pm	

DASHBOARDS

- Recent
- Created by Me
- Private Dashboards
- All Dashboards

FOLDERS

- All Folders
- Created by Me
- Shared with Me

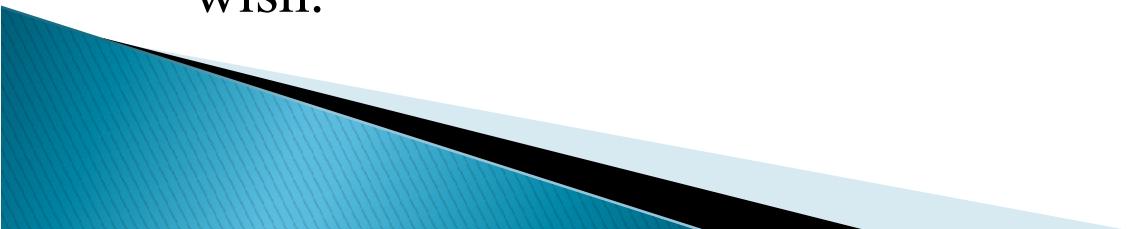
FAVORITES

- All Favorites

# CREATE 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 Travel Approvals Dashboard

- ❖ Click on Dashboards tab from the travel approval application,click on new dashboard
  - ❖ Give your dashboard a name and click on +component , select the report which you created .
  - ❖ For the data visualization select any of the chart, table etc as your wish.
- 

Developer Portal | Salesforce Dev x Reports | Salesforce x +

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Travel Approval Departments Travel Approvals Expense Items Reports Dashboards Purpose of Trips

Reports Recent 3 items

REPORTS Report Name Description Folder Created By Created On Subscribed

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Expense Items Report		Private Reports	Swathi Suresh	6/4/2023, 10:36 pm	
Created by Me	New Travel Approvals Report		Public Reports	Swathi Suresh	6/4/2023, 10:35 pm	
Private Reports	New Departments Report		Public Reports	Swathi Suresh	6/4/2023, 10:34 pm	

SEARCH recent reports... New Report New Folder

RECENT REPORTS

- New Expense Items Report
- New Travel Approvals Report
- New Departments Report

FOLDERS

- All Folders

CREATED BY ME

- Created by Me
- Shared with Me

FAVORITES

- All Favorites

https://mvmuthiahgovernmentarts-1a-dev-ed.develop.lightning.force.com/lightning/o/Report/home

# CONCLUSION

Travel applications simplify the management processing in traveling. Fast processing and immediate results with high security. Minimizing human efforts and cost efficient databases. Navigation through the site is easy.



THANK  
YOU

