Project Name:- Build An Employee Travel Approval Application For Corporates - (Developer)

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Lightning App

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.
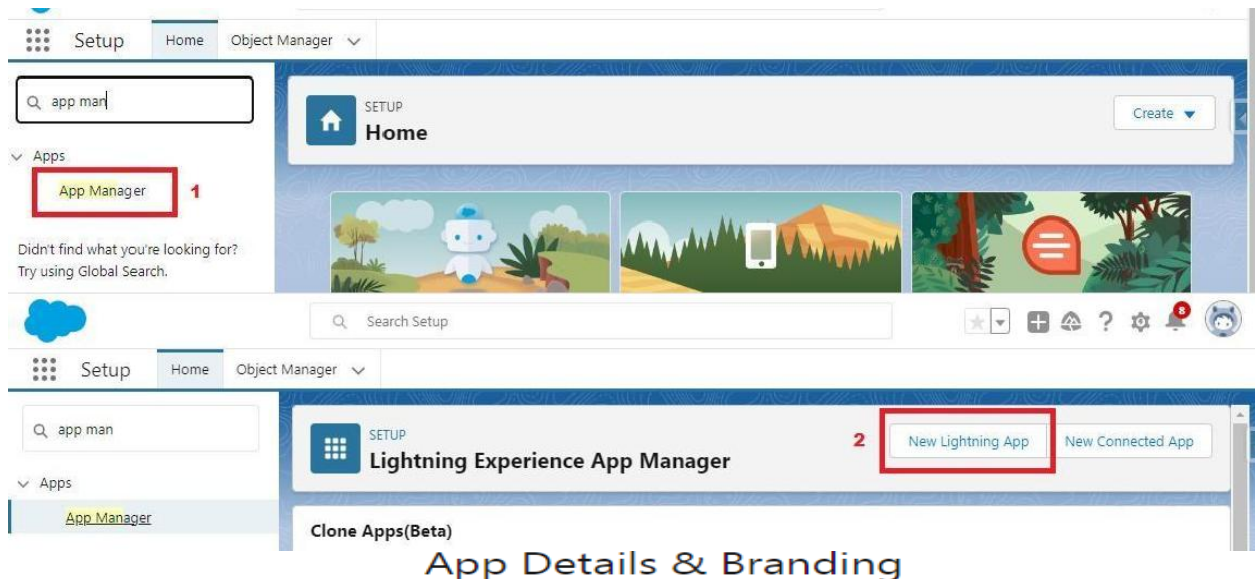
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

6

Available Items   ↻ Create ▼

🔍 DAS   ✕

🔘 Dashboards

Selected Items

💎 Departments

🟡 Employee Details

🔍 Expenses

🔍 Expense Items

📋 Reports

▶   **click here to add items**   ▲

New Lightning App

Available Profiles

🔍 system ad   ✕

System Administrator

7

Selected Profiles

▶

◀

No Profiles selected

Save & Finish
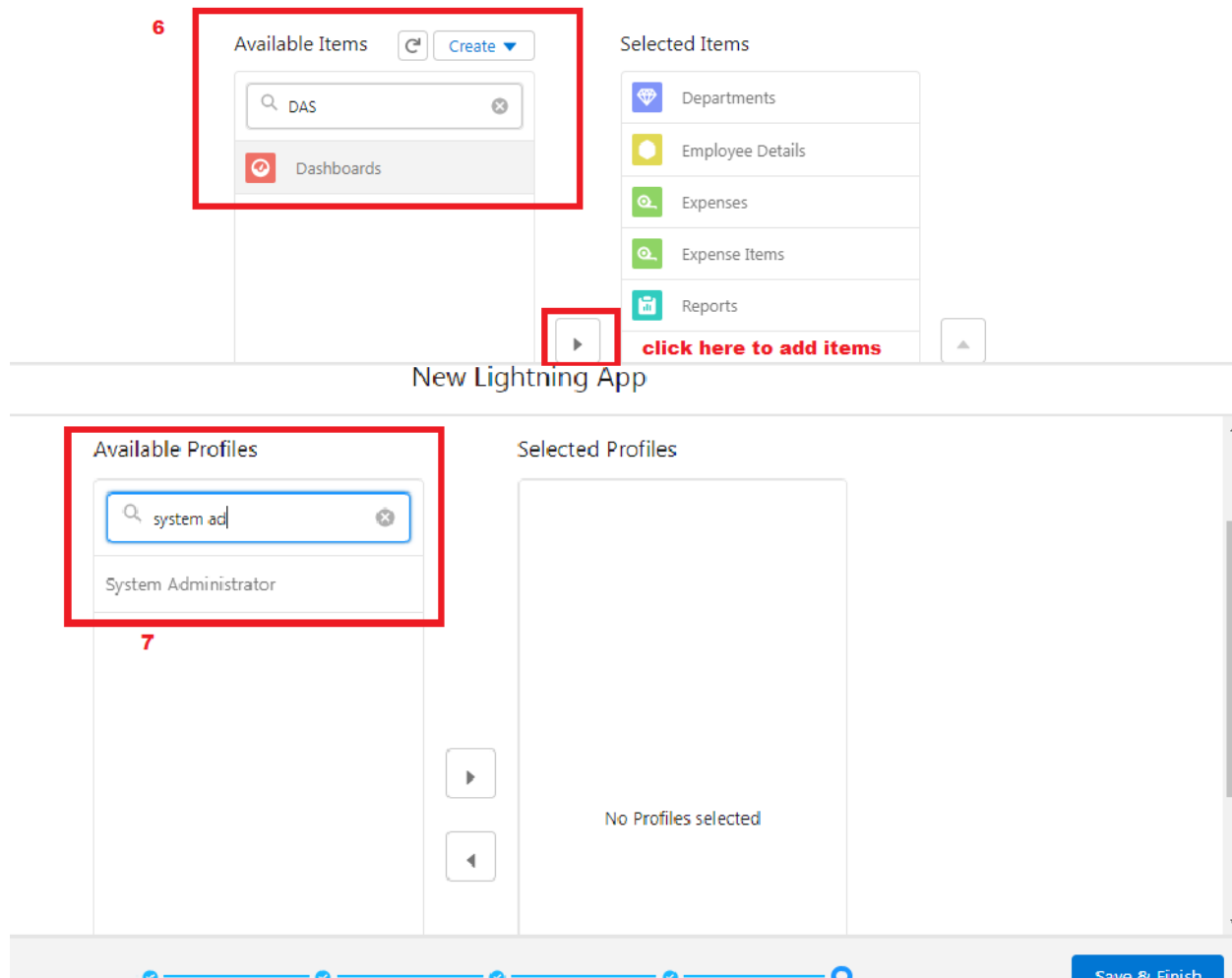
Creation Of Fields For The Department Object:

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.
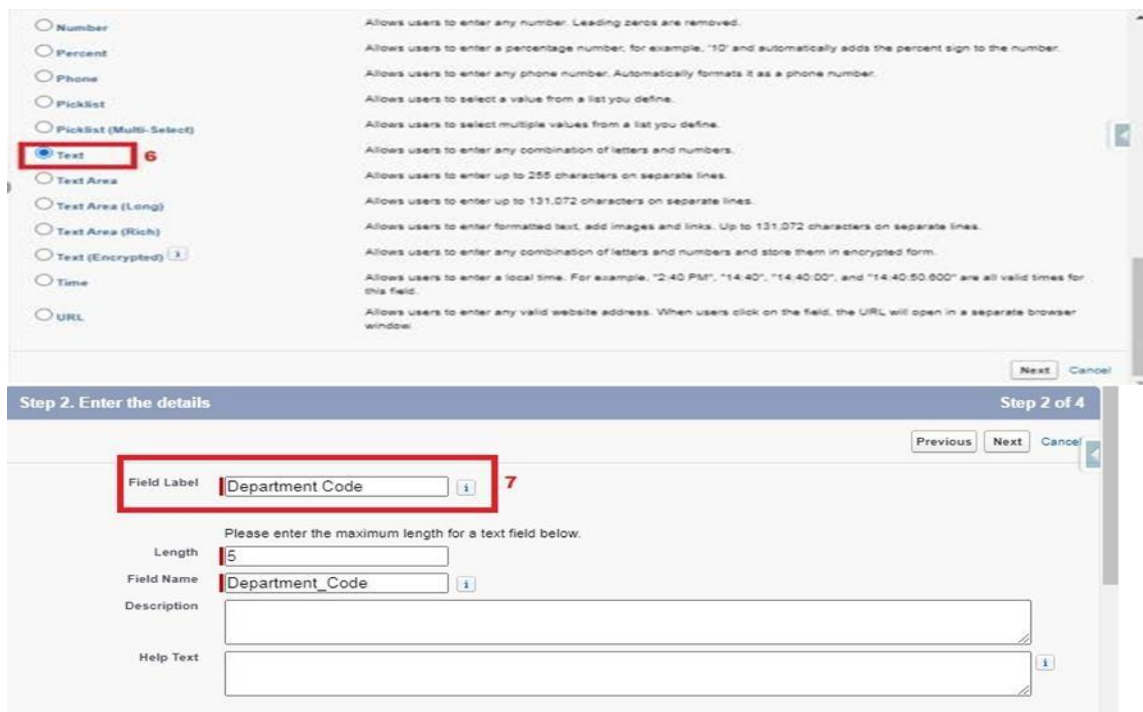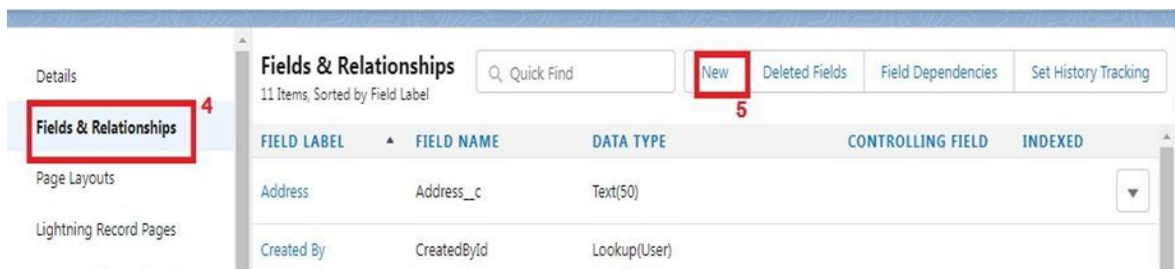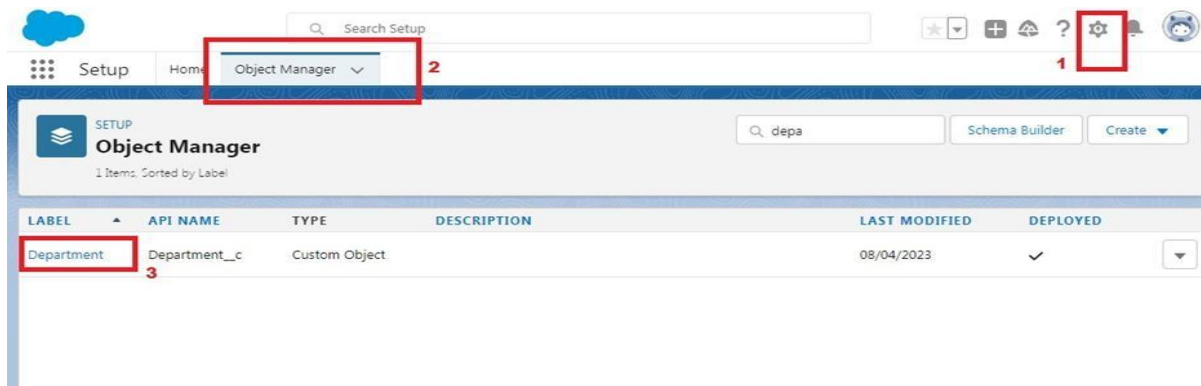
Lookup Relationship With Department

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.

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

○ Formula

○ 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:

1
- 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.

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SETUP > OBJECT MANAGER
Expense Item

Details	Expense Item	Help for this Page ❓
Fields & Relationships	**New Relationship**	

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Step 2. Choose the related object   **Step 2 of 6**

Previous | Next | Cancel
3

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

Related To | Event ▾ |

Previous | Next | Cancel

SETUP > OBJECT MANAGER
Expense Item

Details	Expense Item	Help for this Page ❓
Fields & Relationships	**New Relationship**	

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Object Limits

Record Types

Step 3. Enter the label and name for the lookup field   **Step 3 of 6**

Previous | Next | Cancel

Field Label | Expense | ⓘ   **4**   **5**

Field Name | Expense | ⓘ

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.

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** — 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.

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● **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

[Previous] [Next] Cancel

7

Field Label | Total Expense | ⓘ

Field Name | Total_Expense | ⓘ

Description | [   ]

Help Text | [   ] ⓘ

Auto add to custom report type ☑ Add this field to existing custom report types that contain this entity ⓘ

Select Object to Summarize   ❙ = Required Information

Master Object   Expense

9

Summarized Object   [Expense Items ▾]

Select Roll-Up Type

10

○ COUNT

● SUM
○ MIN   Field to Aggregate [Amount ▾]
○ MAX

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

Details	
Fields & Relationships	
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○ Date/Time — 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.

○ Email — 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.

○ Geolocation — Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

○ Number — Allows users to enter any number. Leading zeros are removed.

○ Percent — Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

○ Phone — Allows users to enter any phone number. Automatically formats it as a phone number.

● Picklist   **3** — Allows users to select a value from a list you define.

○ Picklist (Multi-Select) — Allows users to select multiple values from a list you define.

○ Text — Allows users to enter any combination of letters and numbers.

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Step 2. Enter the details   Step 2 of 4

4

[Previous] [Next] [Cancel]   **10**

Field Label | Expense Type | ⓘ

Values ○ Use global picklist value set

5

● 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 | ex | ⓘ

Description | |

Import Departments

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.

Choose data   Edit mapping   Start import

Customerss	>
Departments	>	**3**
Drivers	>

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	>
Buyers	>
Customerss	>
Departments	✓

Add new records   ✓

Match by: ❓
--None-- ▾

Which User field in your file designates record owners? ❓
--None-- ▾

Trigger workflow rules and processes? ❓
☐ Trigger workflow rules and processes for new and updated records

Drag CSV file here to upload

📄 CSV

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**
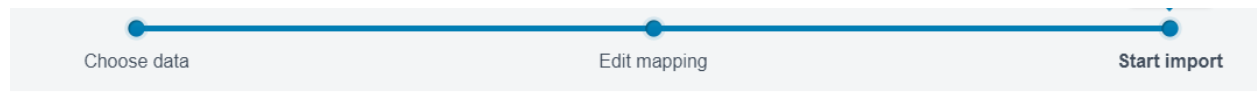
Review & Start Import

Review your import information and click Start Import.

Your selections:

	Your import **will include:**	Your import **will not include:**
Departments ✔	Mapped fields	Unmapped fields
Add new records ✔		
Departments csv.csv ✔	**2**	**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**