

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

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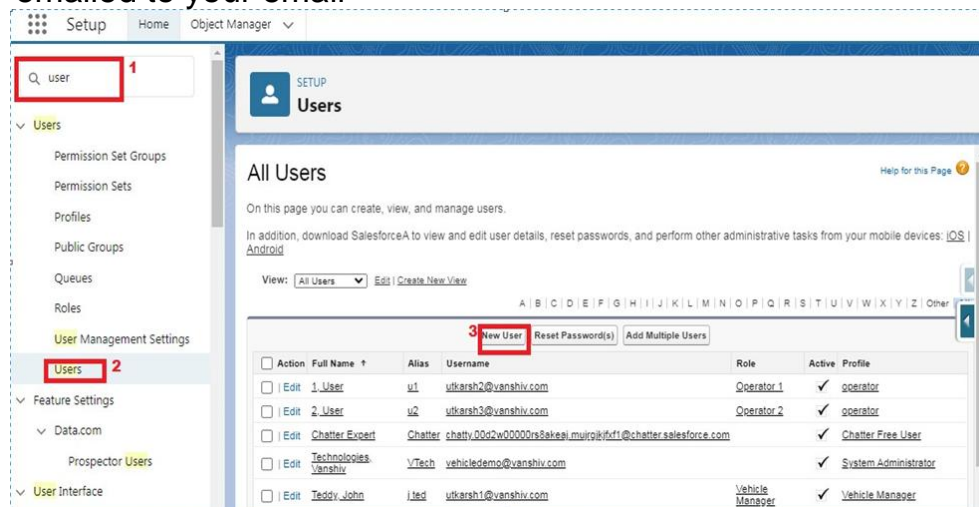
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Users

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.
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

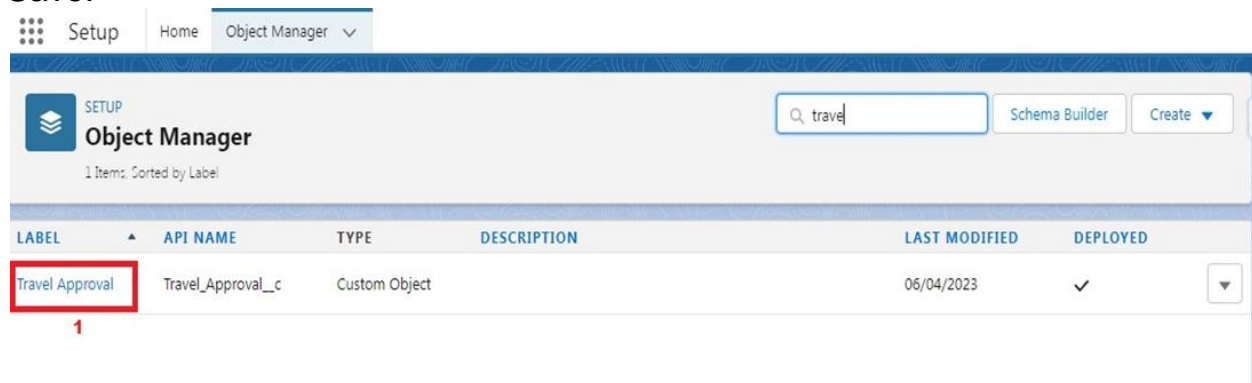


The screenshot shows the 'User Edit' form in Salesforce. The 'General Information' section is expanded. The 'First Name' field is 'Travel Approval' (labeled '4'), 'Last Name' is 'manager', 'Alias' is 'tmana', 'Email' is [redacted], and 'Username' is [redacted]. The 'Role' dropdown is '<None Specified>'. The 'User License' dropdown is 'Salesforce' (labeled '5'). The 'Profile' dropdown is 'Standard User' (labeled '6'). The 'Active' checkbox is checked. Below these are checkboxes for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', and 'Service Cloud'.

Use Customization

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.





SETUP > OBJECT MANAGER

Travel Approval

Details

Fields & Relationships

Page Layouts **2**

Lightning Record Pages

Details

Edit

Delete

Description

API Name

Travel_Approval__c

Enable Reports



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

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find Field Name

Section

Blank Space

Destination State

Purpose of Trip

Trip Start Date

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 Sample Text

Employee Name Sample Text

Department Sample Text

Destination State Sample Text

Purpose of Trip Sample Text

Trip Start Date 07/04/2023

Trip End Date 07/04/2023

Status 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.

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 tabs for 'Setup', 'Home', and 'Object Manager'. Below the tabs, the 'Object Manager' section displays a search bar with 'travel' entered, a 'Schema Builder' button, and a 'Create' dropdown. A table lists the objects, with 'Travel Approval' highlighted by a red box and labeled with a red '1'. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. Below the table, the 'Travel Approval' object details are shown. On the left, a sidebar lists various configuration options, with 'Validation Rules' highlighted by a red box and labeled with a red '2'. The main area shows the 'Details' for the 'Travel Approval' object, including fields for API Name, Singular Label, Plural Label, and various checkboxes for reports, activities, and field history.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Travel Approval	Travel_Approval__c	Custom Object		06/04/2023	✓

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SETUP > OBJECT MANAGER
Travel Approval

Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

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Details

Description

API Name
Travel_Approval__c
Custom
✓
Singular Label
Travel Approval
Plural Label
Travel Approvals

Enable Reports
✓
Track Activities
Track Field History

Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

Edit Delete

SETUP > OBJECT MANAGER
Travel Approval

Validation Rule Edit [Save] [Save & New] [Cancel]

Rule Name: Date_Validation 3

Description:

Error Condition Formula

Example: [Discount_Percent__c > 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

Insert Field Insert Operator 4

Trip_End_Date__c < Trip_Start_Date__c

Check Syntax: No errors found

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

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 then 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 i

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: Text

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.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A search bar labeled 'Search Setup' is on the right. Below the navigation bar, the 'Static Resources' section is highlighted in the left sidebar. The main content area shows the 'Static Resource Edit' form. The form has fields for 'Name' (containing 'StatusImages'), 'Description', 'File' (with a 'Choose File' button), and 'Cache Control' (set to 'Private'). At the bottom of the form, there are 'Save' and 'Cancel' buttons. Below the form, the 'Object Manager' section is visible, showing a table with one item: 'Travel Approval'.

Static Resource Edit

Static Resource Information

Name: StatusImages

Description:

File: Choose File No file chosen

Cache Control: Private

Save Cancel

Object Manager

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Travel Approval	Travel_Approval__c	Custom Object		06/04/2023	✓

Details **6**

Fields & Relationships 11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

Next Cancel

Specify the type of information that the custom field will contain.

Data Type

☐ None Selected Select one of the data types below.

☐ Auto Number **7** 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.

☐ Roll-Up Summary [1](#) 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).

Step 2. Choose output type Step 2 of 5

Previous Next Cancel

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Field Label Field Name [i](#)

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity [i](#)

Formula Return Type

☐ None Selected Select one of the data types below.

☐ 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`

☐ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Full Name = LastName & ", " & FirstName` [More Examples...](#)

Simple Formula Advanced Formula

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Insert Field Insert Operator

Status Indicator (Text) =

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

Functions

-- All Function

ABS

ACOS

ADDMONTH

AND

ASCII

ASIN

Insert selected