

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

Team ID : LTVIP2024TMID12769

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Team Member : R PALGUNA

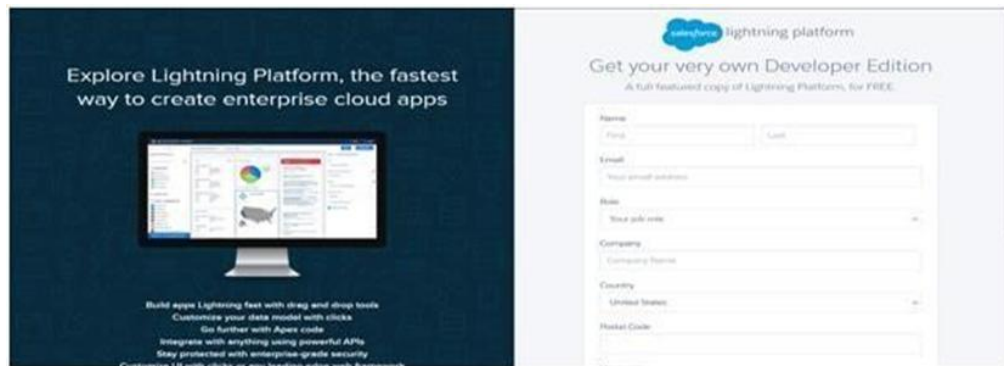
Milestone 1- Create Salesforce Org

Creating Developer Org

Creating a developer org in salesforce.

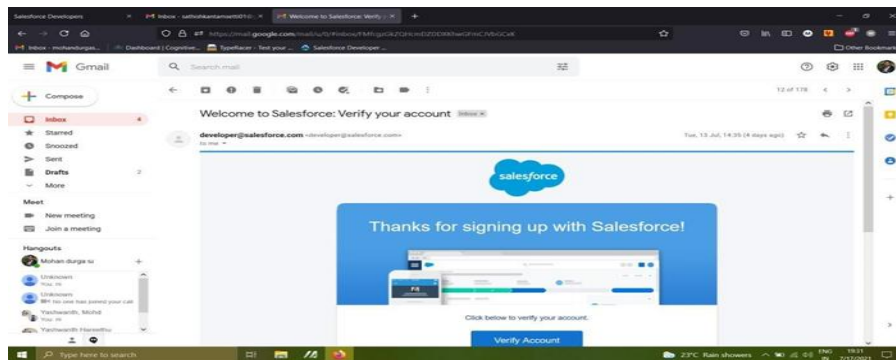
1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign-up form, enter the following details:
 1. First name & Last name
 2. Email
 3. Role: Developer
 4. Company: College Name
 5. Country: India
 6. Postal Code: pin code
 7. Username: should be a combination of your name and company
This need not be an actual email id, you can give anything in the format:
username@organization.com

Click on sign up after filling these.



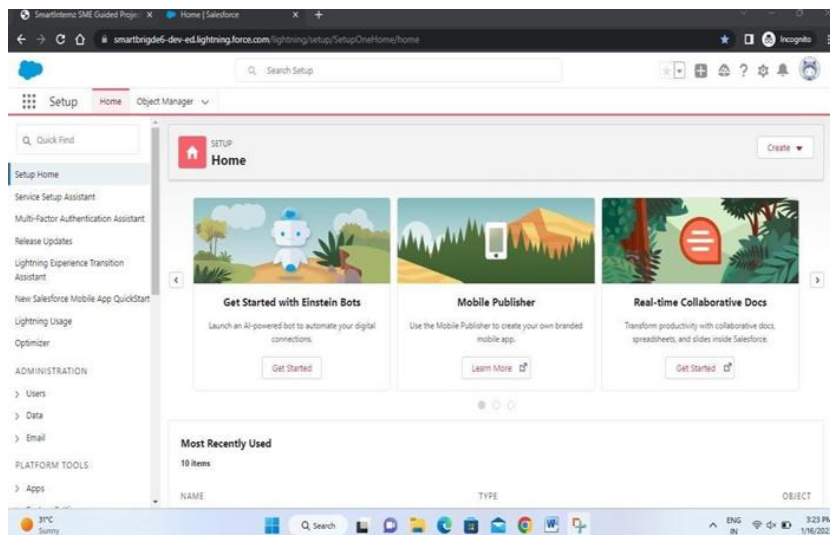
Account Activation

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



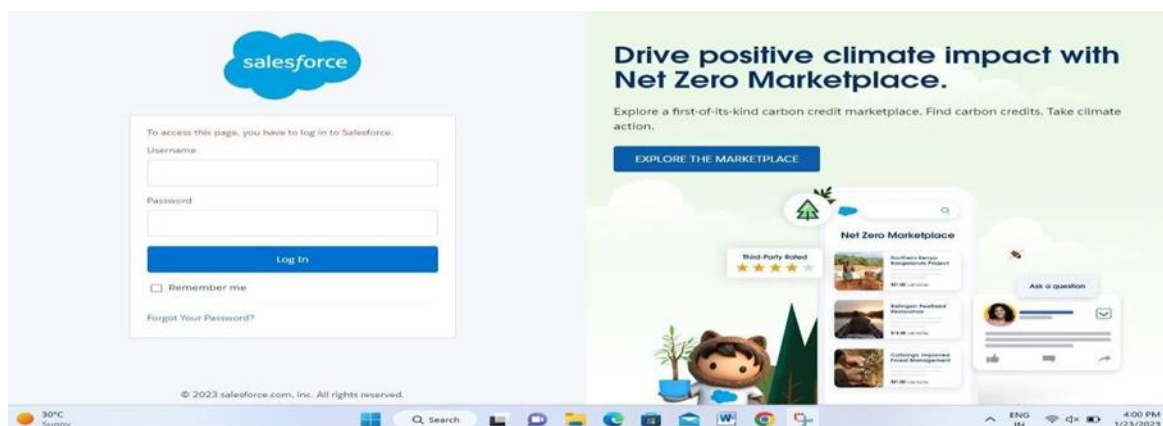
Login To Your Salesforce Account

1. Go to [salesforce.com](https://login.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.



Salesforce Login

<https://login.salesforce.com>



Object In Salesforce

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.

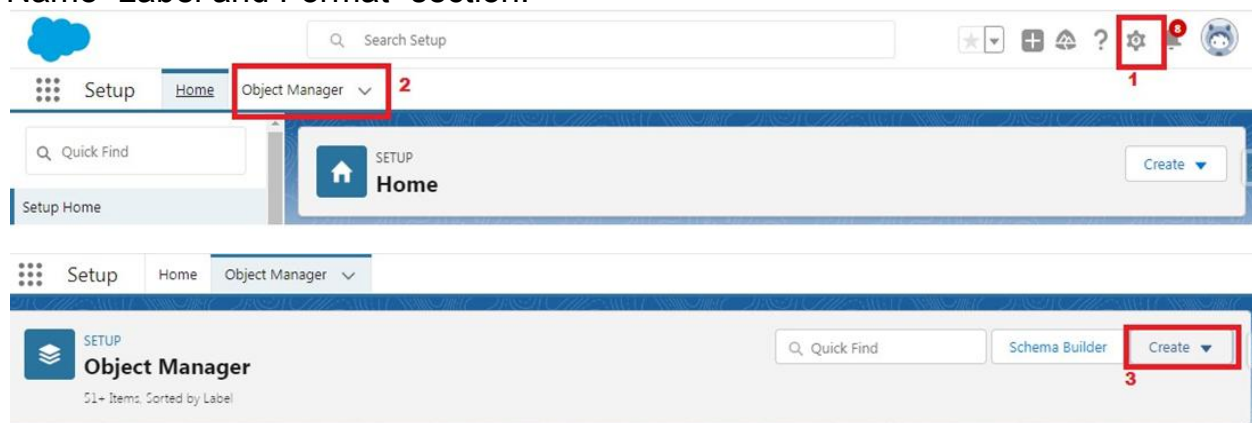
Create Department Object:

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.



The singular and plural labels are used in tabs, page layouts, and reports.

5 Label Example: Account

6 Plural Label Example: Accounts

Starts with vowel sound ☐

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 8

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing 

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

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What Is A Tab?

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.

The screenshot displays the Salesforce Setup interface. In the left sidebar, the search bar contains the text "tabs", and the "Tabs" link under the "User Interface" section is highlighted. The main content area shows the "Custom Tabs" section, where the "New" button is highlighted. Below this, the "Step 1. Enter the Details" form is visible, showing the "Object" dropdown set to "--None--" and the "Tab Style" dropdown set to a default icon.

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now.

Object: --None--

Tab Style: [Icon]