

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:

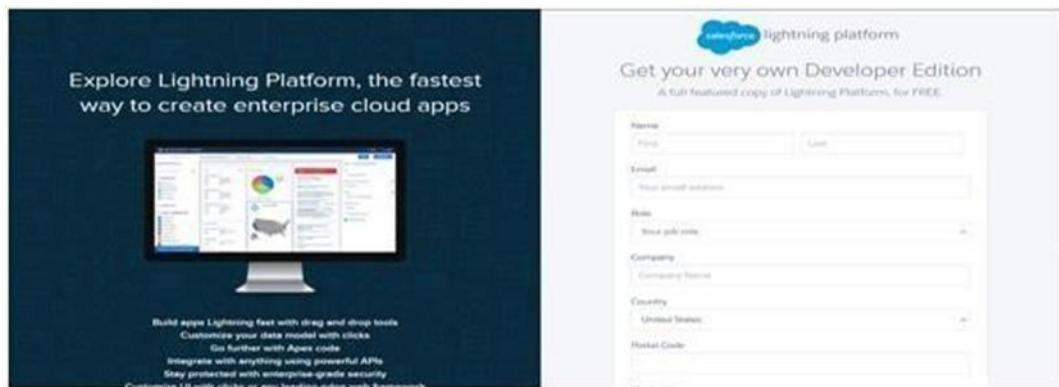
<https://youtu.be/r9EX3IGde5k>

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. County: 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.



Sign up to get your very own Developer Edition for free to create ente..

Sign up to get your very own Developer Edition for free to create enterprise cloud apps...

<https://developer.salesforce.com/signup>

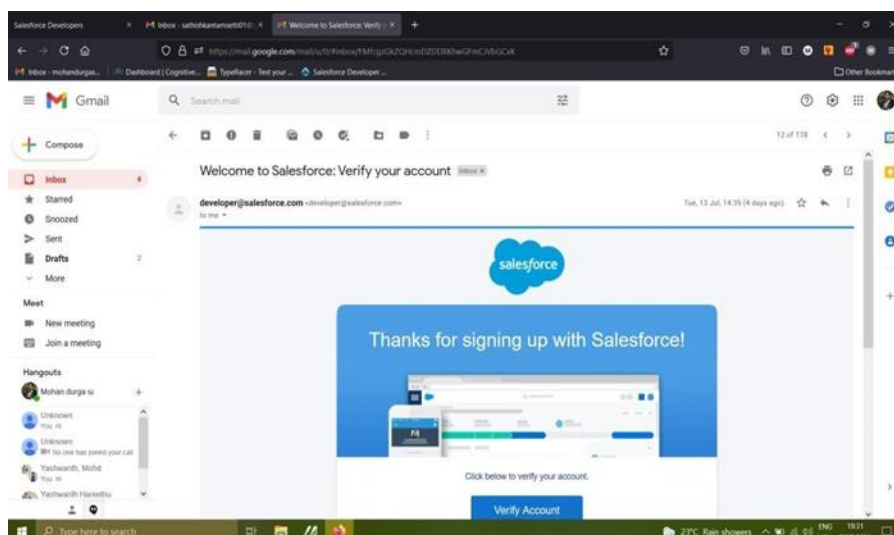
Sign up to get your very own Developer Edition for free to create ente..

Sign up to get your very own Developer Edition for free to create enterprise cloud apps...

<https://developer.salesforce.com/signup>

Account Activation

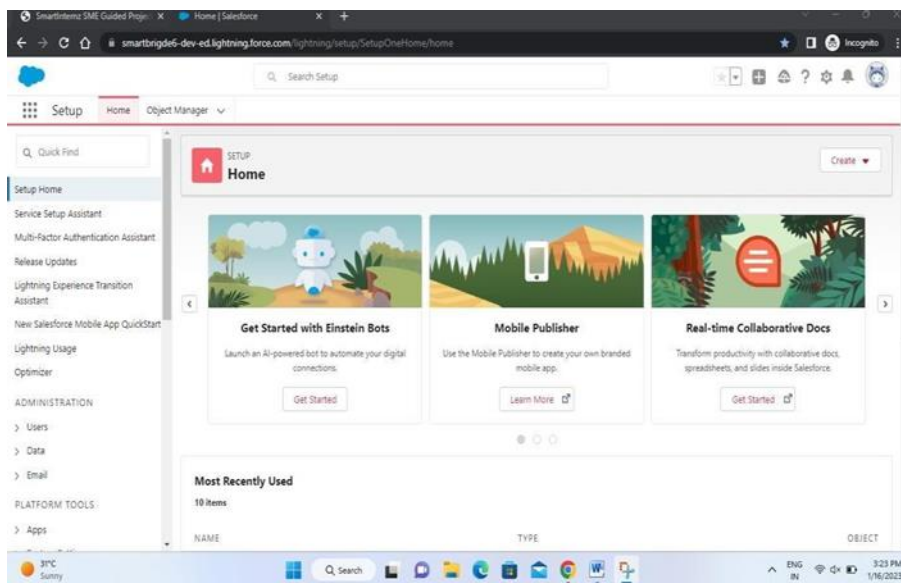
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



Login To Your Salesforce Account

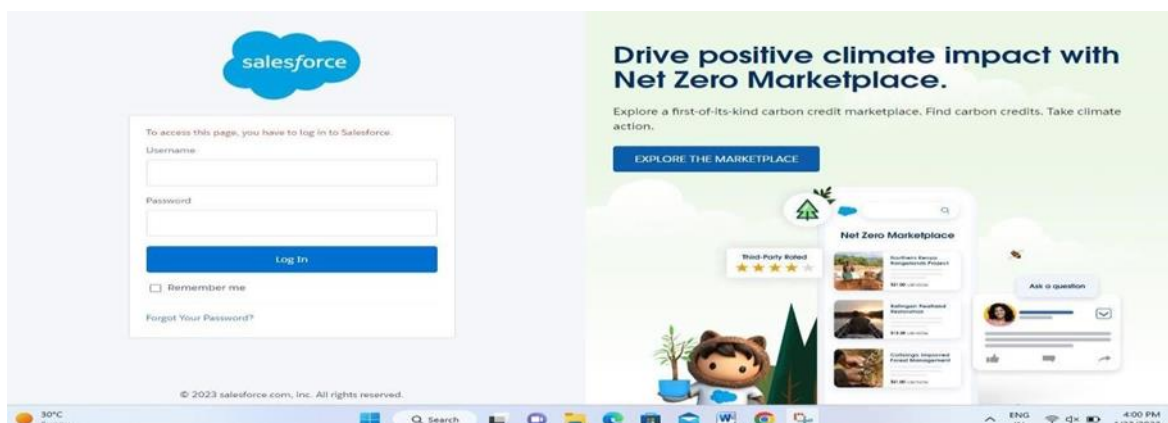
1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.

3. After login this is the home page which you will see.



Salesforce Login

<https://login.salesforce.com>



Salesforce Customer Secure Login Page. Login to your Salesforce Custom..

Salesforce Customer Secure Login Page. Login to your Salesforce Customer Account...

<https://login.salesforce.com/>

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.

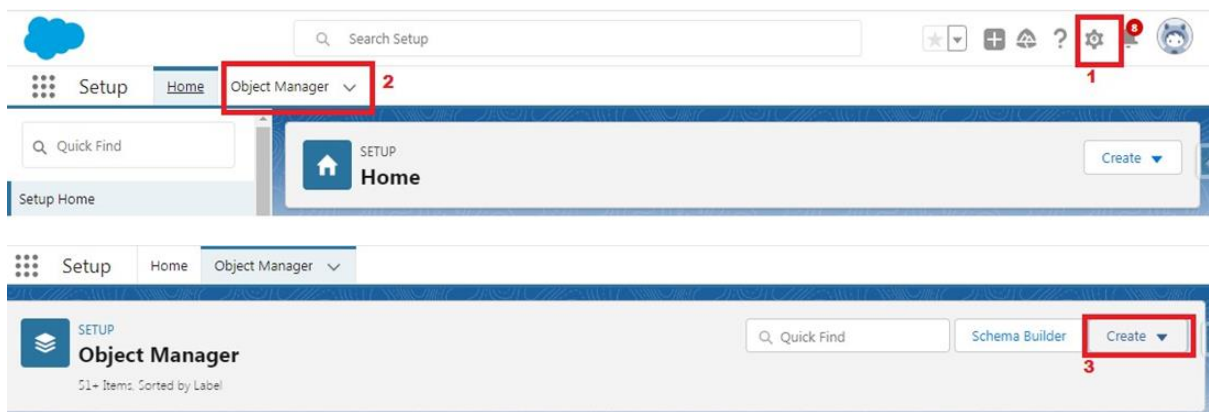
Create Department Object:

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.



This screenshot shows the 'Custom Object Definition' page for the 'Department' object. The 'Label' field is set to 'Department' (labeled '5') and the 'Plural Label' field is set to 'Departments' (labeled '6'). The 'Object Name' field is set to 'Department'. The 'Record Name' field is set to 'Department Name' (labeled '7'). The 'Example' field is set to 'Account Name'. The 'Context-Sensitive Help Setting' is set to 'Open the standard Salesforce.com Help & Training window'. The 'Content Name' is set to 'None--'. The 'Enter Record Name Label and Format' section is visible at the bottom.

Optional Features

☒ Allow Reports ⁸

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing ⁹

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

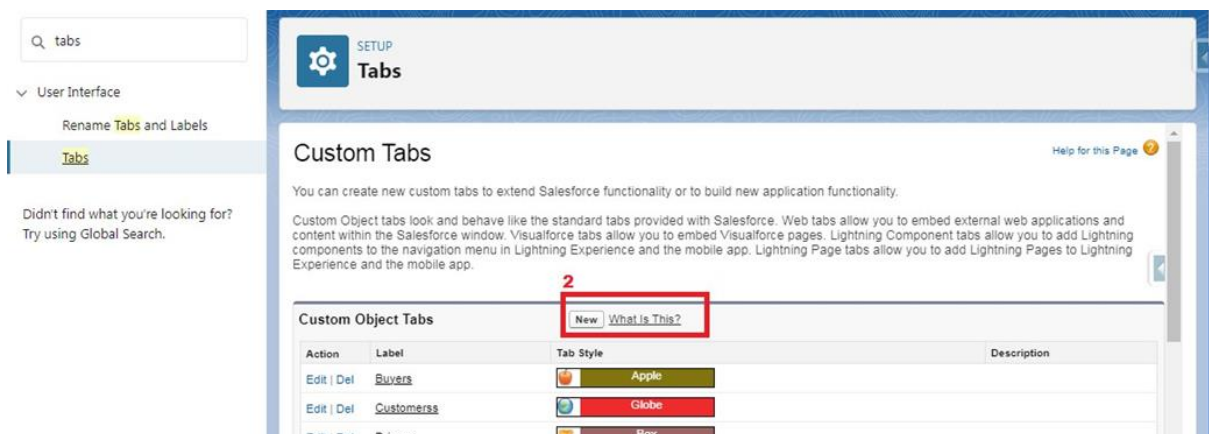
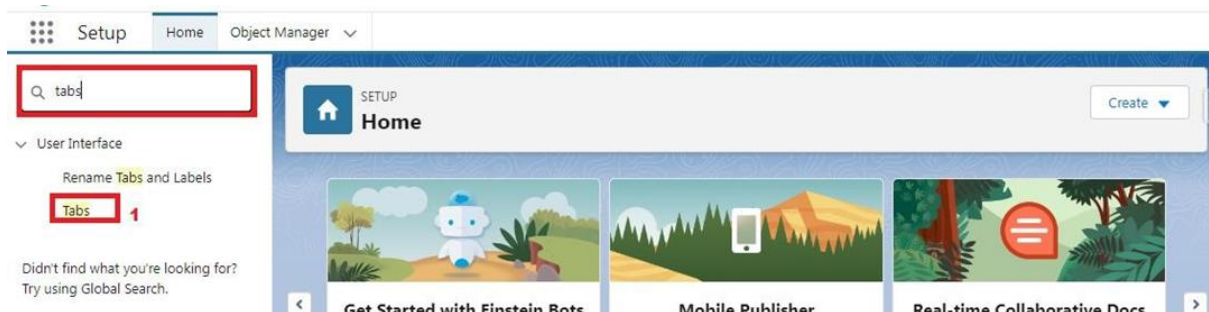
☐ Launch New Custom Tab Wizard after saving this custom object

¹⁰

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.



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.

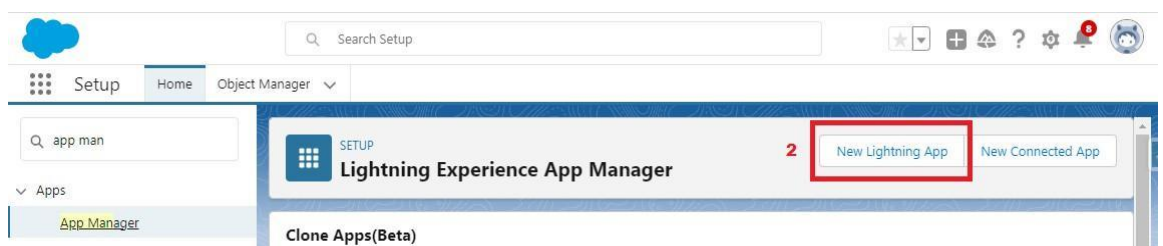
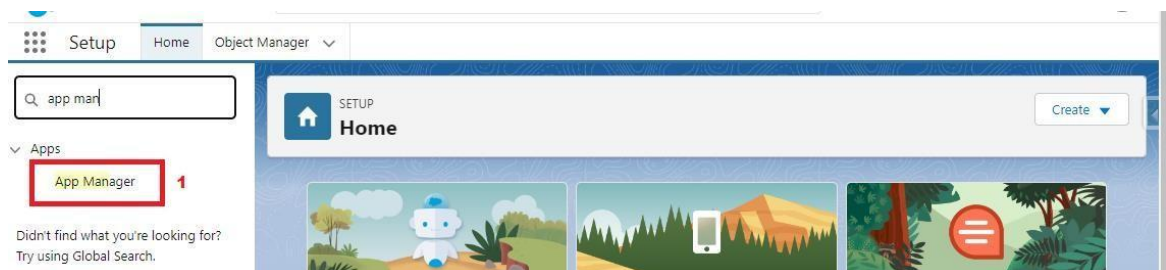
Object: --None-- 3

Tab Style: [Icon] 4

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.



App Details & Branding

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

3

App Details

* App Name ⓘ
Travel Approval

* Developer Name ⓘ
Travel_Approval_

App Branding

Image ⓘ
Upload

Primary Color Hex Value ⓘ
#0070D2

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

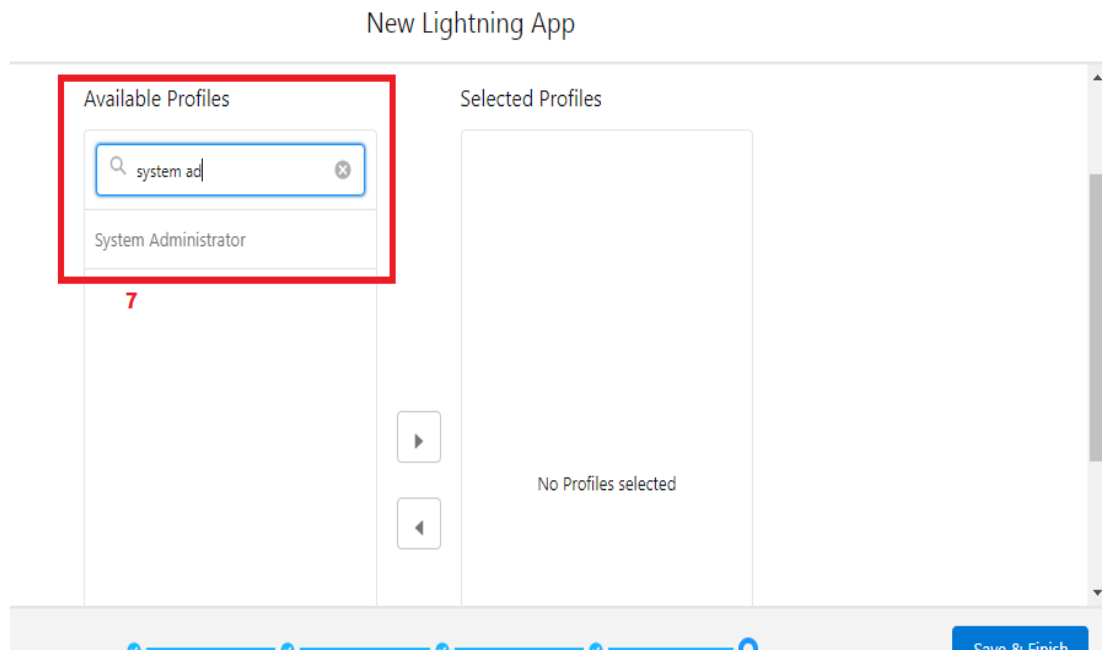
Employee Details

Expenses

Expense Items

Reports

click here to add items



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.

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.

Cloud logo

Search Setup

Setup Home Object Manager 2

1

SETUP
Object Manager
1 Item, Sorted by Label

Q depa Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Department 3	Department__c	Custom Object		08/04/2023	✓

Details

Fields & Relationships 4

Page Layouts

Lightning Record Pages

Fields & Relationships
11 Items, Sorted by Field Label

Q Quick Find New 5 Deleted Fields Field Dependencies Set History Tracking

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

☐ 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 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 6 Allows users to enter any combination of letters and numbers.

☐ Text Area Allows users to enter up to 255 characters on separate lines.

☐ Text Area (Long) Allows users to enter up to 131,072 characters on separate lines.

☐ Text Area (Rich) Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

☐ Text (Encrypted) 1 Allows users to enter any combination of letters and numbers and store them in encrypted form.

☐ Time Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

☐ 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

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- lookup)	Date of Birth	Date
	Gender	Picklist (Male, Female)
	Department	Lookup (Department)(See activity 2 to create
	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- Rejected)	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,

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.

☐ 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  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** 1 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 Relationship 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 


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

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


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

4

Field Label 

Field Name 

Description

Help Text 

Step 6. Add custom related listsStep 6 of 6

PreviousSave & NewSaveCancel

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

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 *i*

Lookup Relationship

Master-Detail Relationship

1

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

Help for this Page

Step 2. Choose the related object

Step 2 of 6

Previous **Next** Cancel

Select the other object to which this object is related.

Related To **Event**

Previous Next Cancel

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

Expense Item

New Relationship

Help for this Page

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

Step 3 of 6

Previous **Next** Cancel

Field Label **Expense**

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

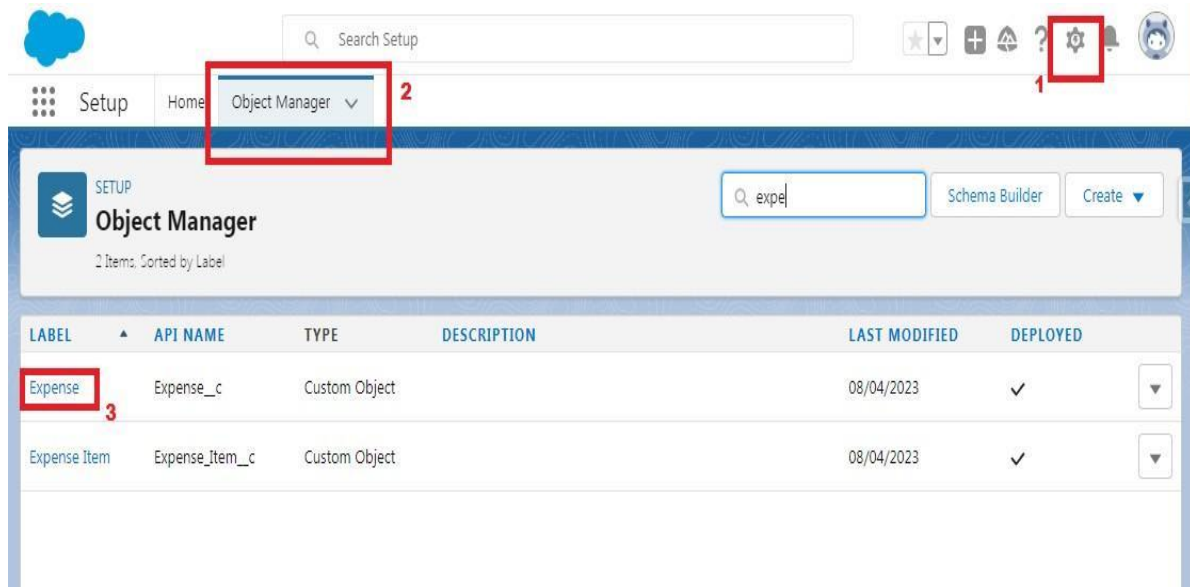
1. Click the gear icon Select Setup, This launches Setup in a new tab.
2. click Object Manager
3. Select Expense.
4. Click Fields & Relationships
5. Click New.

Select the Roll-up summary field as the data type
Enter the field label as Total Expense

Click Next

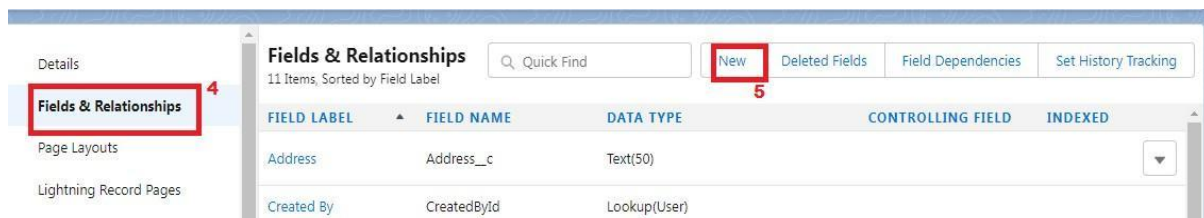
Then select the master object summarized as Expense items

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



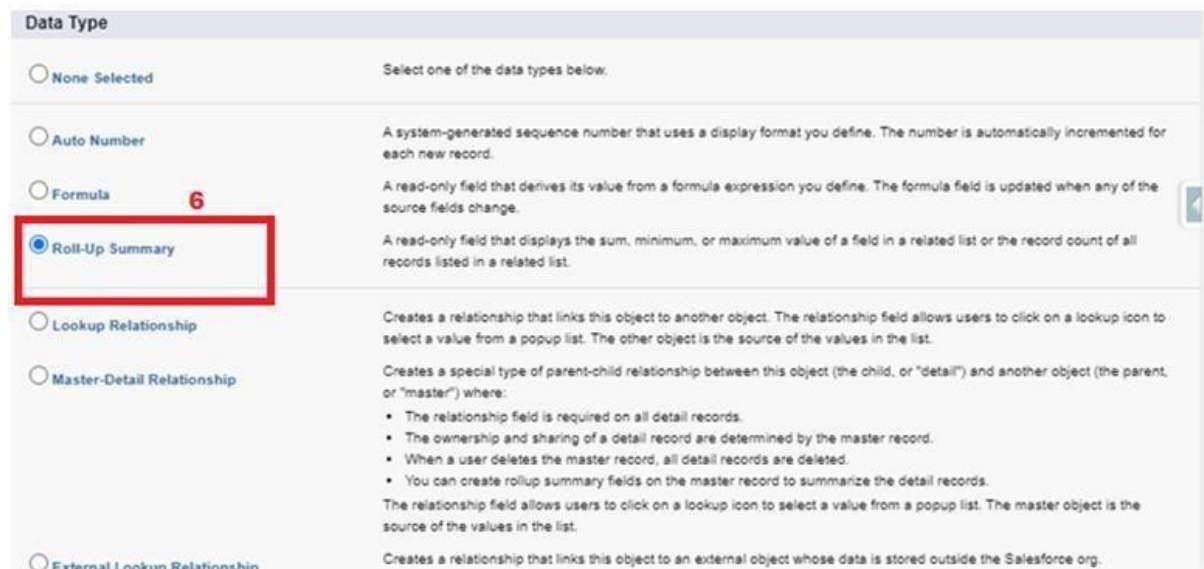
This screenshot shows the Salesforce Setup interface. At the top, the 'Setup' tab is selected, and the 'Object Manager' dropdown menu is highlighted with a red box and the number 2. To the right, a gear icon in the top navigation bar is also highlighted with a red box and the number 1. Below the navigation bar, the 'Object Manager' section is displayed with a search bar containing 'expe'. A table lists two objects: 'Expense' and 'Expense Item'. The 'Expense' row is highlighted with a red box and the number 3. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

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	✓



This screenshot shows the 'Fields & Relationships' section in Salesforce Setup. The left sidebar has 'Fields & Relationships' highlighted with a red box and the number 4. The main area shows a table of fields for the 'Expense' object. A 'New' button is highlighted with a red box and the number 5. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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



This screenshot shows the 'Data Type' selection screen in Salesforce Setup. The 'Roll-Up Summary' option is selected and highlighted with a red box and the number 6. The screen displays various data type options with their descriptions.

Data Type

Select one of the data types below.

- ☐ None Selected
- ☐ Auto Number
- ☐ Formula
- ☒ Roll-Up Summary
- ☐ Lookup Relationship
- ☐ Master-Detail Relationship
- ☐ External Lookup Relationship

Step 2. Enter the details

Step 2 of 5

PreviousNextCancel

7

Field Label

Total Expense

i

Field Name

Total_Expense

i

Description

Help Text

i

Auto add to custom report type

☒ Add this field to existing custom report types that contain this entity

i

Select Object to Summarize

= Required Information

Master ObjectExpense

Summarized Object

Expense Items

9

Select Roll-Up Type

☐ COUNT

☒ SUM

☐ MIN

☐ MAX

Field to Aggregate

Amount

10

Filter Criteria

☒ All records should be included in the calculation

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

PreviousNextCancel

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

Search Setup

Setup Home Object Manager 1b

1a

SETUP Object Manager
2 Items, Sorted by Label

exp Schema Builder Create

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	✓

1c

SETUP > OBJECT MANAGER
Expense Item

Details Fields & Relationships 2a

Page Layouts Lightning Record Pages

Fields & Relationships 2b
6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(10, 8)		
Created By	CreatedById	Lookup(User)		

Details

Fields & Relationships

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Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Picklist 3

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

Step 2. Enter the details

Step 2 of 4

Previous **Next** 10

Field Label **Expense Type** 4

Values

☐ Use global picklist value set

☒ Enter values, with each value separated by a new line 5

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

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.

Setup Home Object Manager

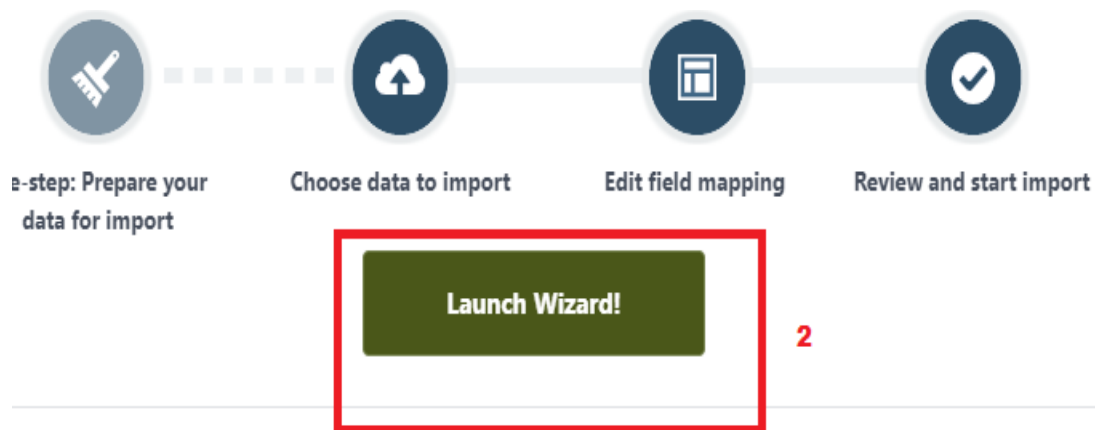
data impo

Integrations 1

Data Import Wizard

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

SETUP Home Create



Let's do this

Choose data Edit mapping Start import

Customerss >

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

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

Buyers


Customers

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

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 D	Division of Disability and Rehabilitative Services
Change	Department Code	Department code	O001	D001	D002

Cancel

Previous

Next

Choose data Edit mapping Start import

Review & Start Import

Review your import information and click Start Import. [Help for this page](#)

Your selections:

- Departments ✓
- Add new records ✓
- Departments csv.csv ✓

Your import **will include**:

Mapped fields	Unmapped fields
2	0

Your import **will not include**:

Cancel Previous **Start Import** ⁷

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.

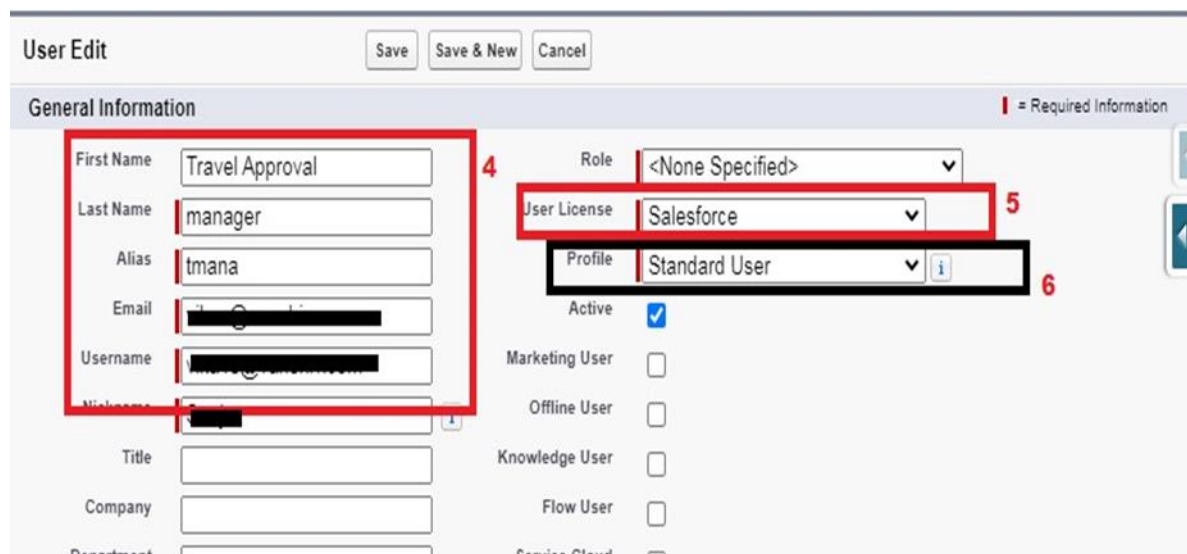
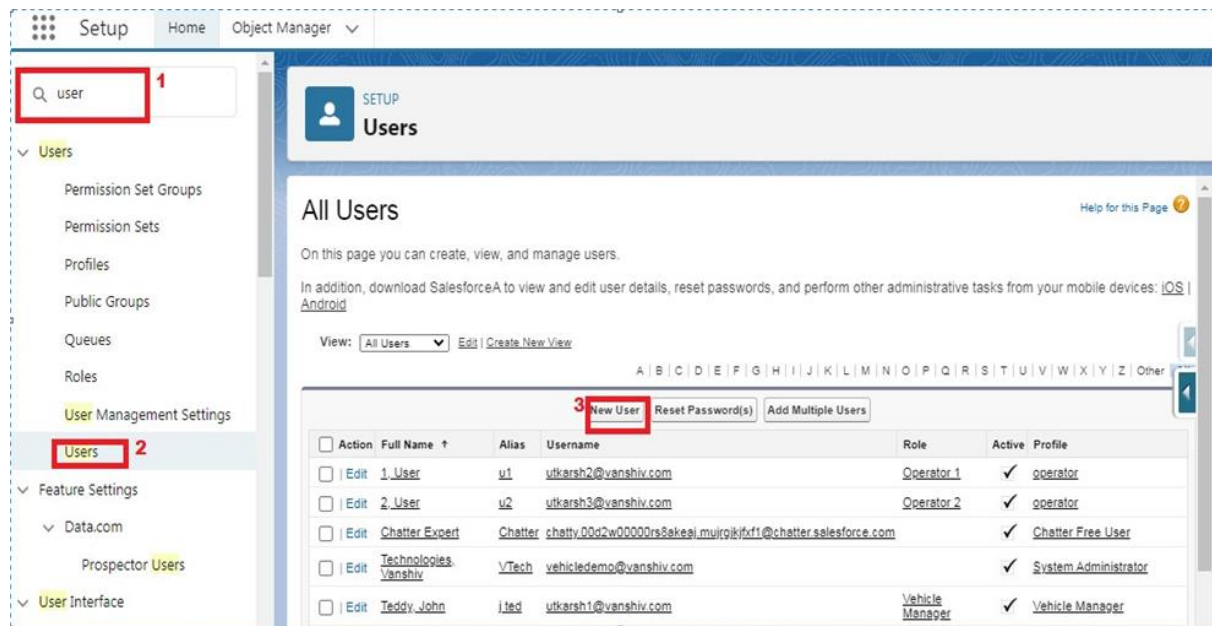
Creating A User In Salesforce

- 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.

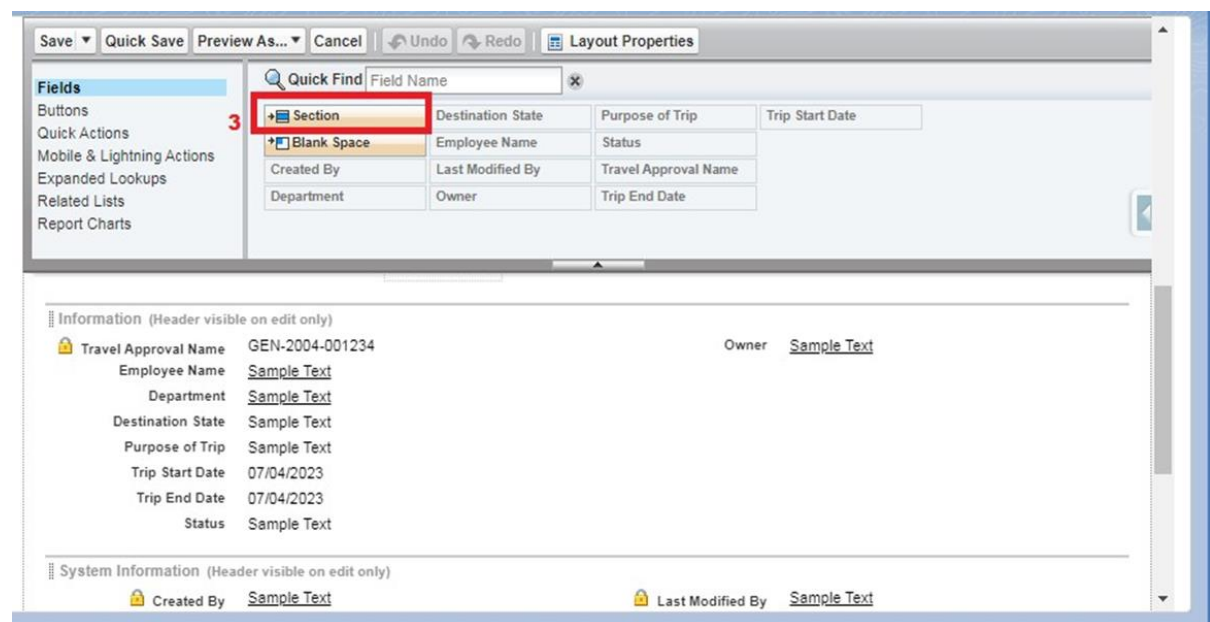
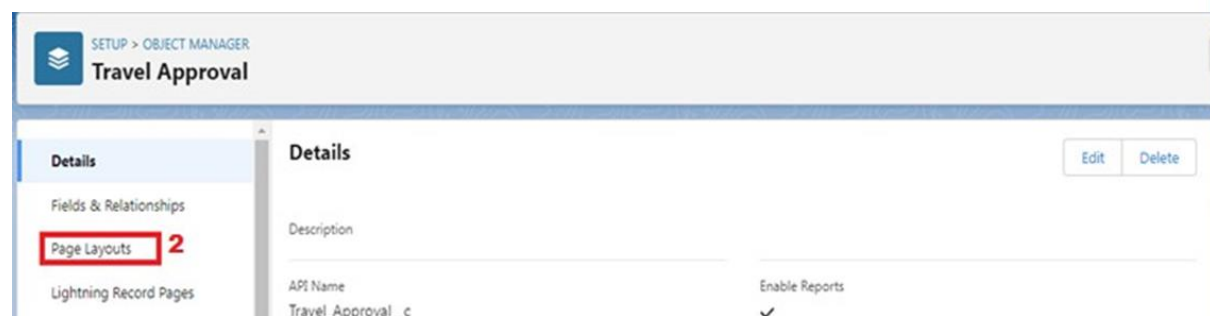
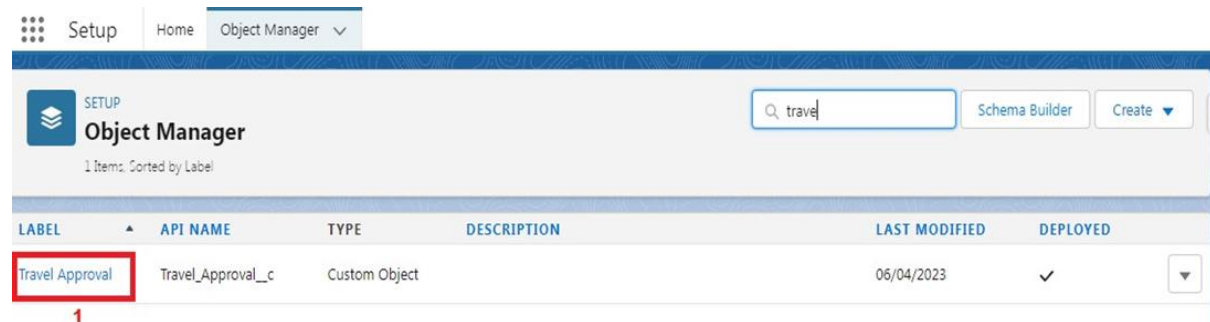
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.



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.



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 displays the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. Below this, the 'Object Manager' header shows a search bar with 'travel' entered, a 'Schema Builder' button, and a 'Create' dropdown. A table lists objects, with 'Travel Approval' highlighted and marked with a red box and a red '1'. Below the table, the 'Travel Approval' details page is shown. On the left, a sidebar lists various configuration options, with 'Validation Rules' highlighted and marked with a red box and a red '2'. The main area shows the 'Details' for the 'Travel Approval' object, including fields for Description, API Name, Custom, Singular Label, Plural Label, and various settings like Enable Reports, Track Activities, and Deployment Status.

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

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

SETUP > OBJECT MANAGER

Travel Approval

Validation Rule Edit Save Save & New Cancel

Rule Name: **Date_Validation** 3

Active: ☒

Description:

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

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:

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

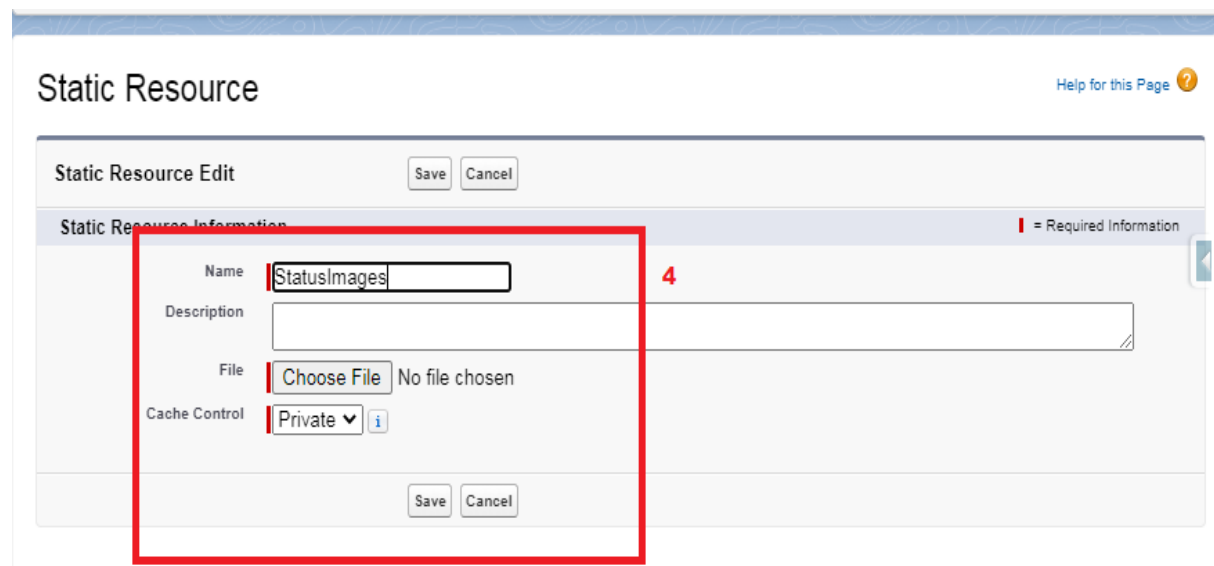
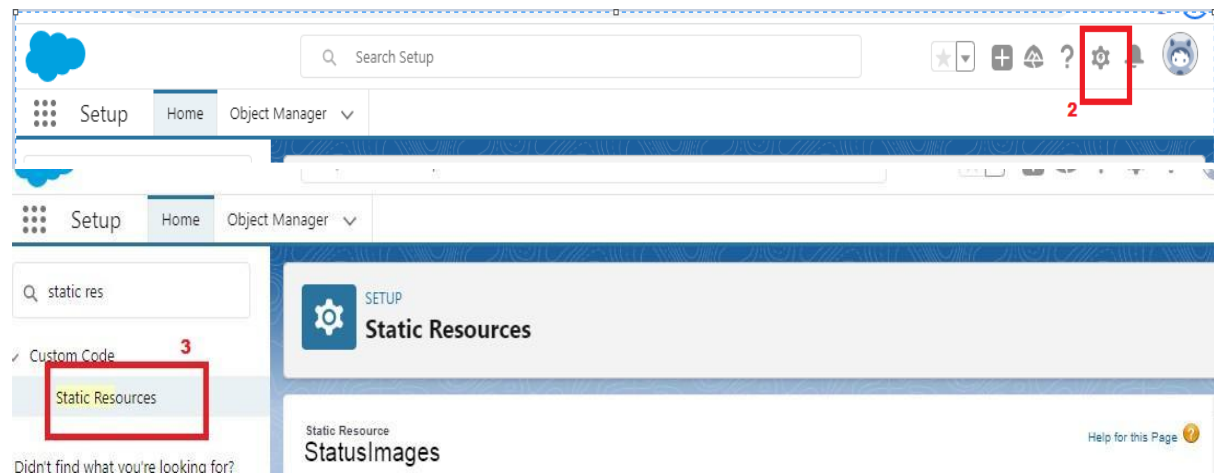
Field Name: Status_Indicator (This automatically gets sent when you tab out of the Field Label field)

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.



Setup Home Object Manager

Object Manager

1 Item, Sorted by Label

travel

Schema Builder Create

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

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

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)		

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

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.

☐ 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").

Step 2. Choose output type

Step 2 of 5

Field Label Status Indicator Field Name Status_Indicator

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

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`

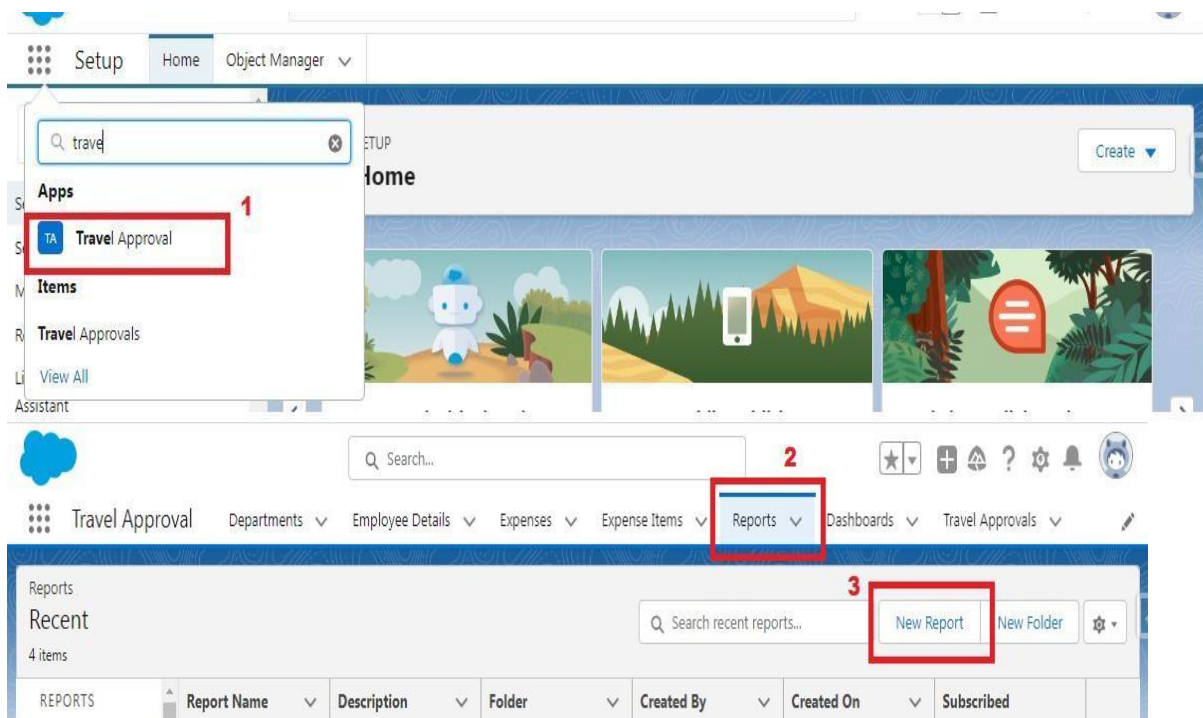
☐ Date Calculate a date, for example, by adding or subtracting days to other dates.



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



Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Select a Report Type

Q depart

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

REPORT

New Report

Travel Approvals with Department

↶ ↷

Add Chart

Save & Run

Save

Close

Run

Outline

Filters

To see the latest edits, refresh the preview

Refresh

Update Preview Automatically

Groups

GROUP ROWS

Add group...

Department: Department Name

GROUP COLUMNS

Add group...

	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 ⓘ

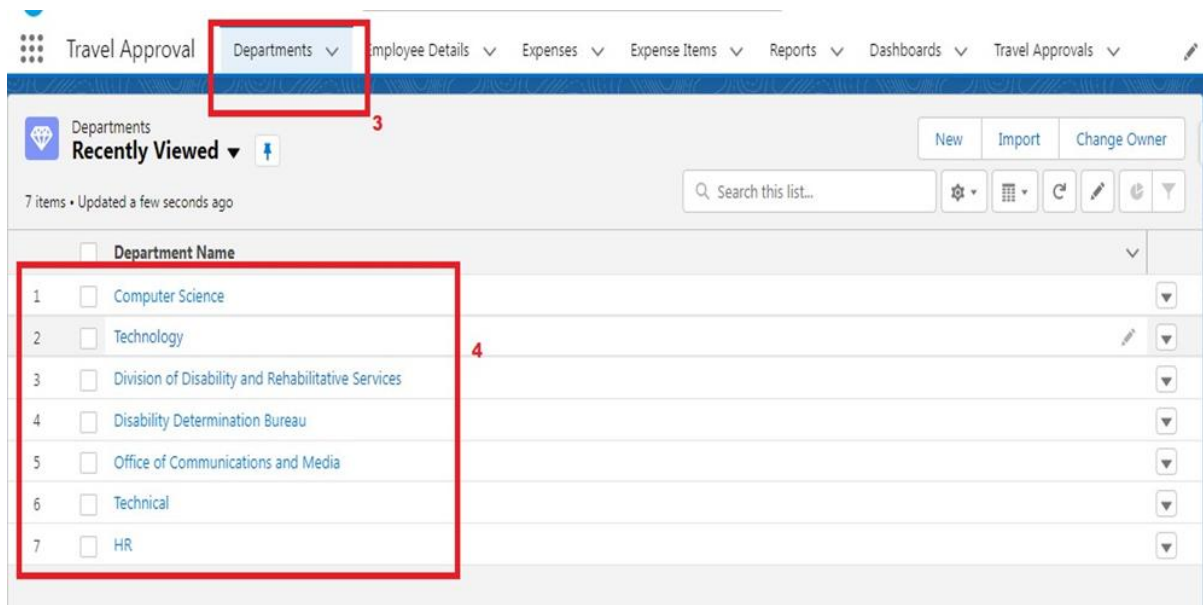
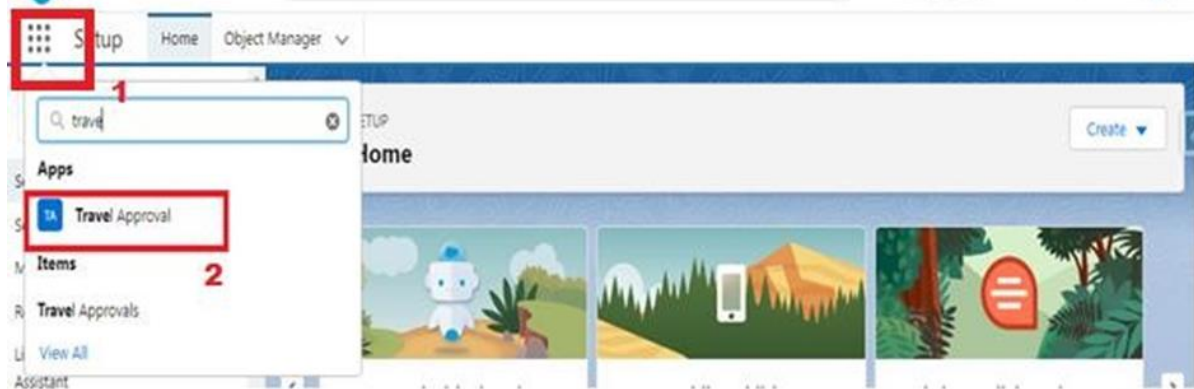
New_Report_iUr

Report Description

View Record

View Record (Department):

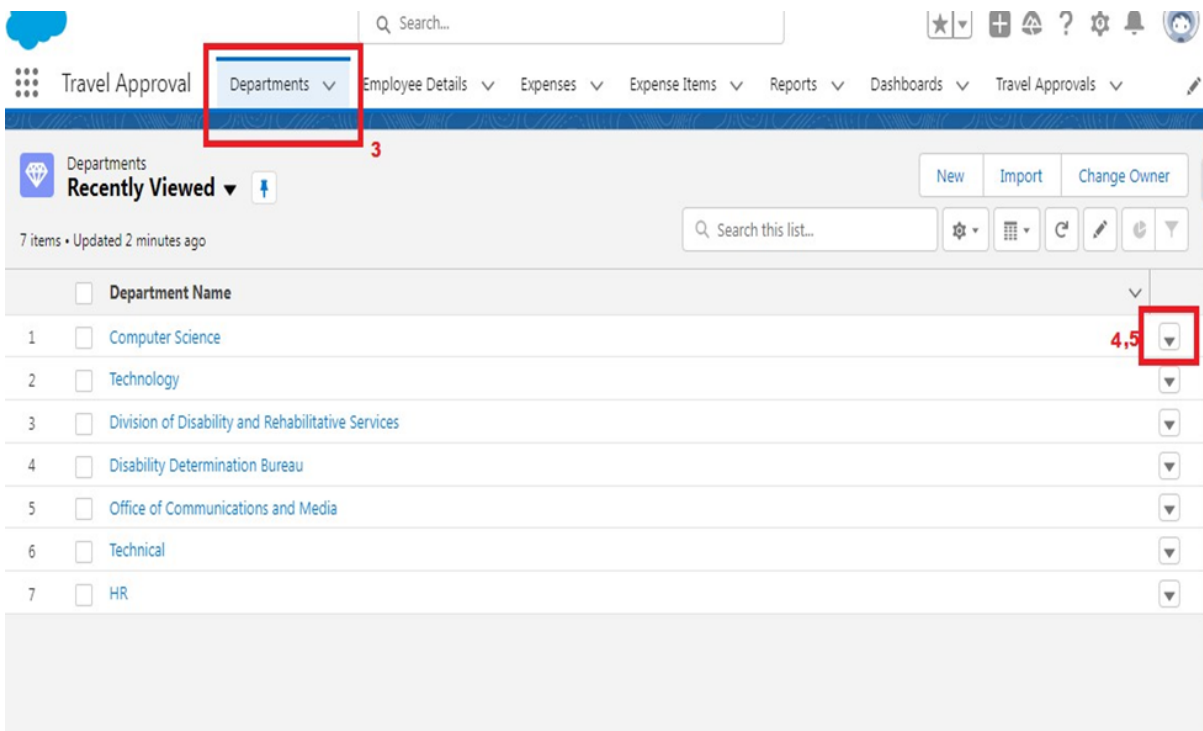
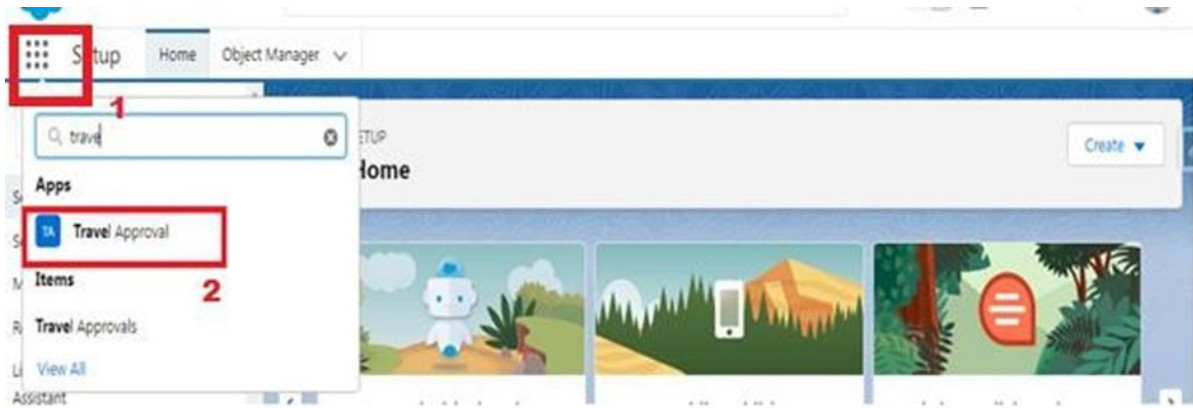
1. Click on App Launcher on left side of screen.
2. Search Travel Approval & click on it.
3. Click on Department Tab.
4. Click on any record name. you can see the details of the Department



Delete Record

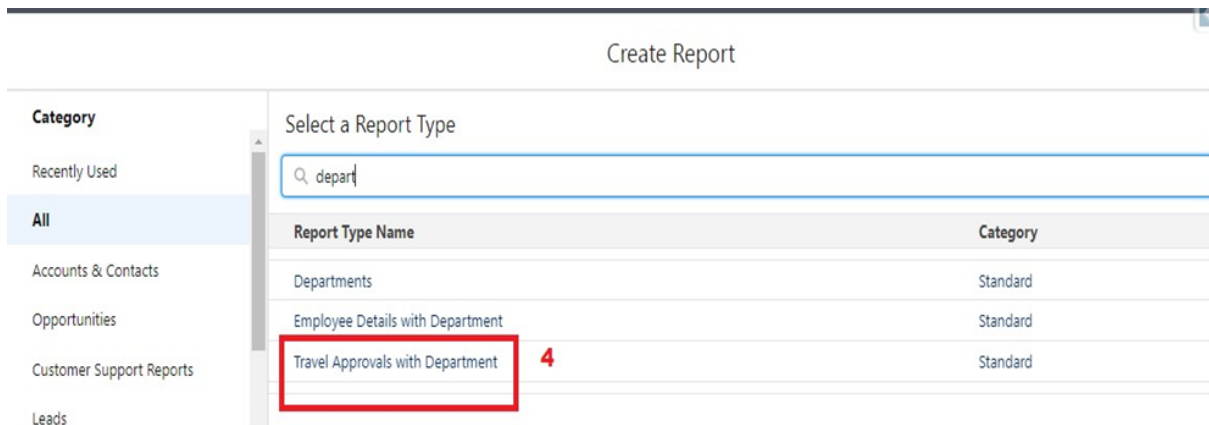
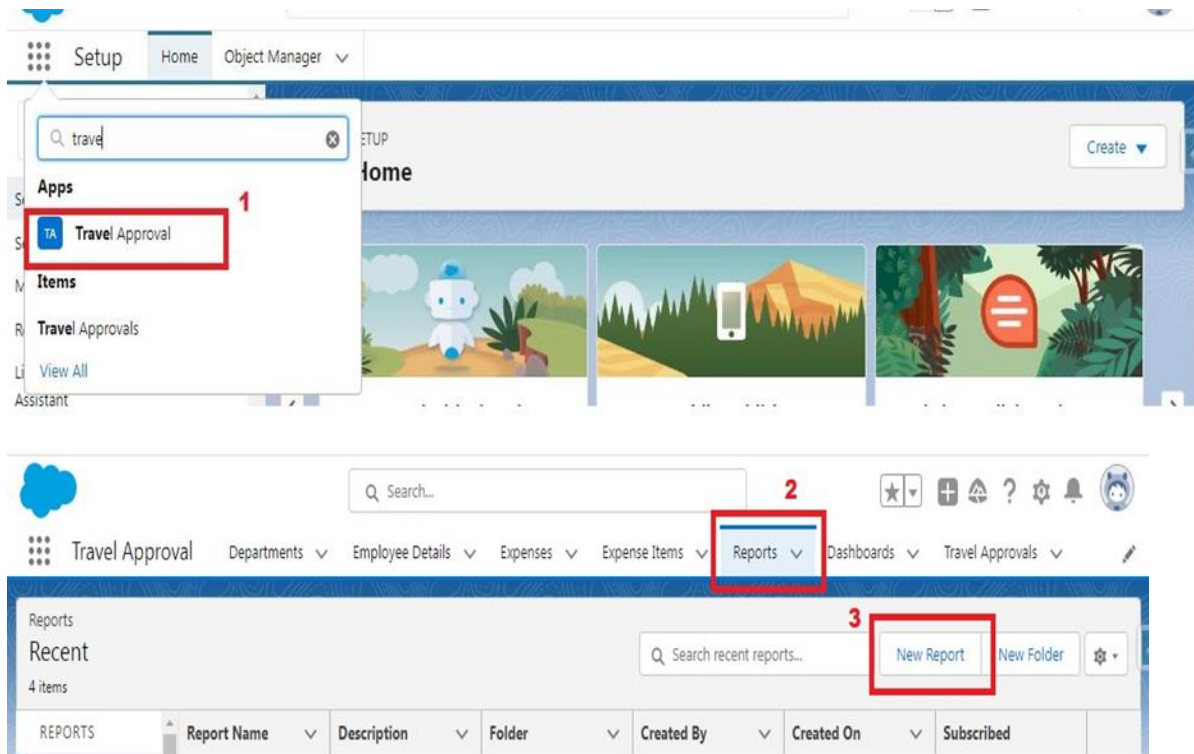
Delete Record (Department):

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.



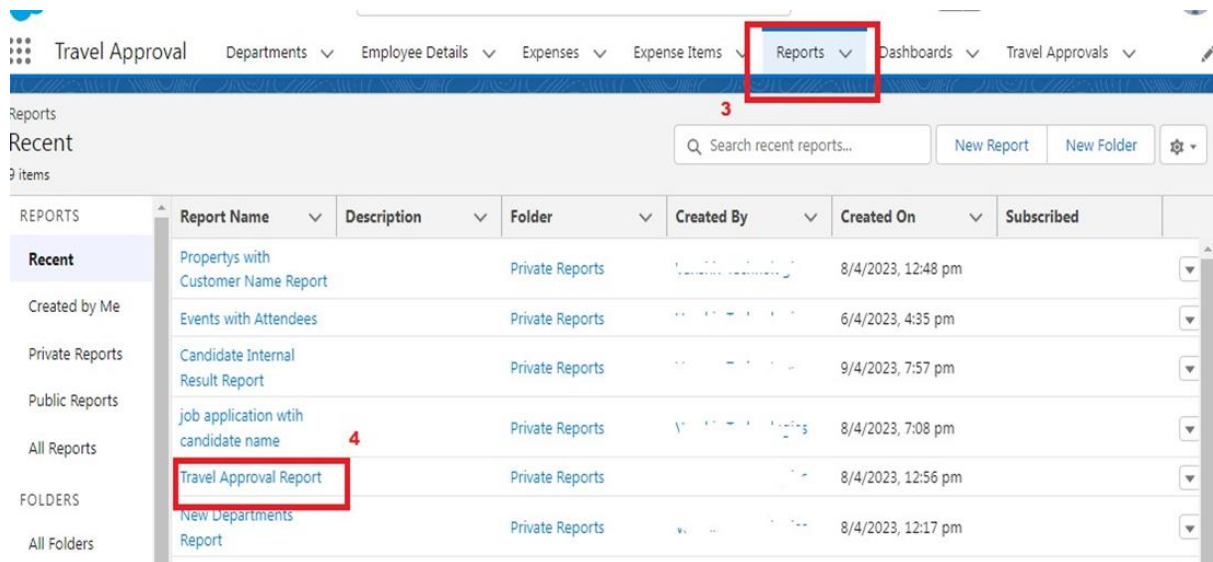
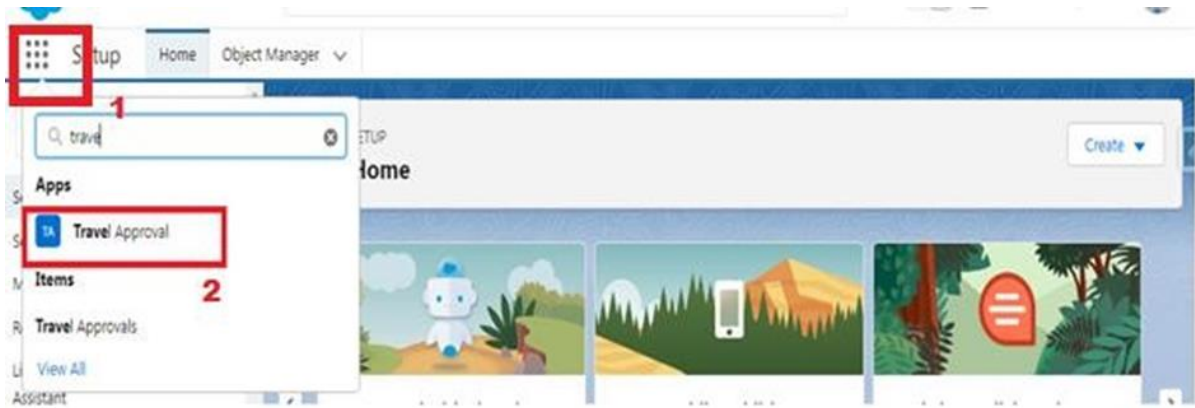
Create Report

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



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.



Create Dashboard

Click on the Dashboards tab from the travel approval application,

Click on a new dashboard

Give name- Travel Approval

Click Create

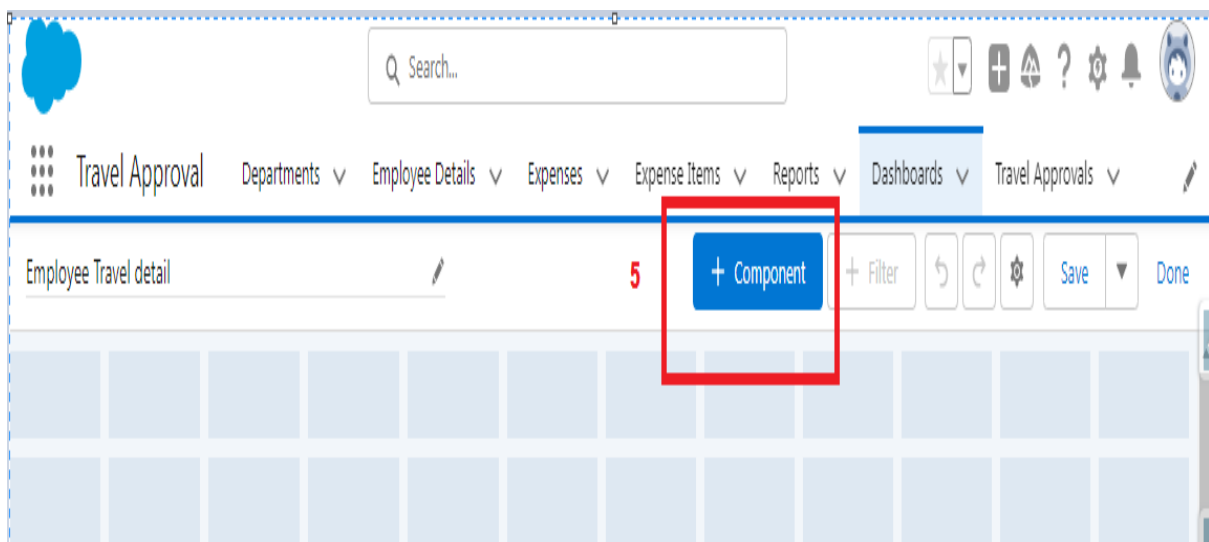
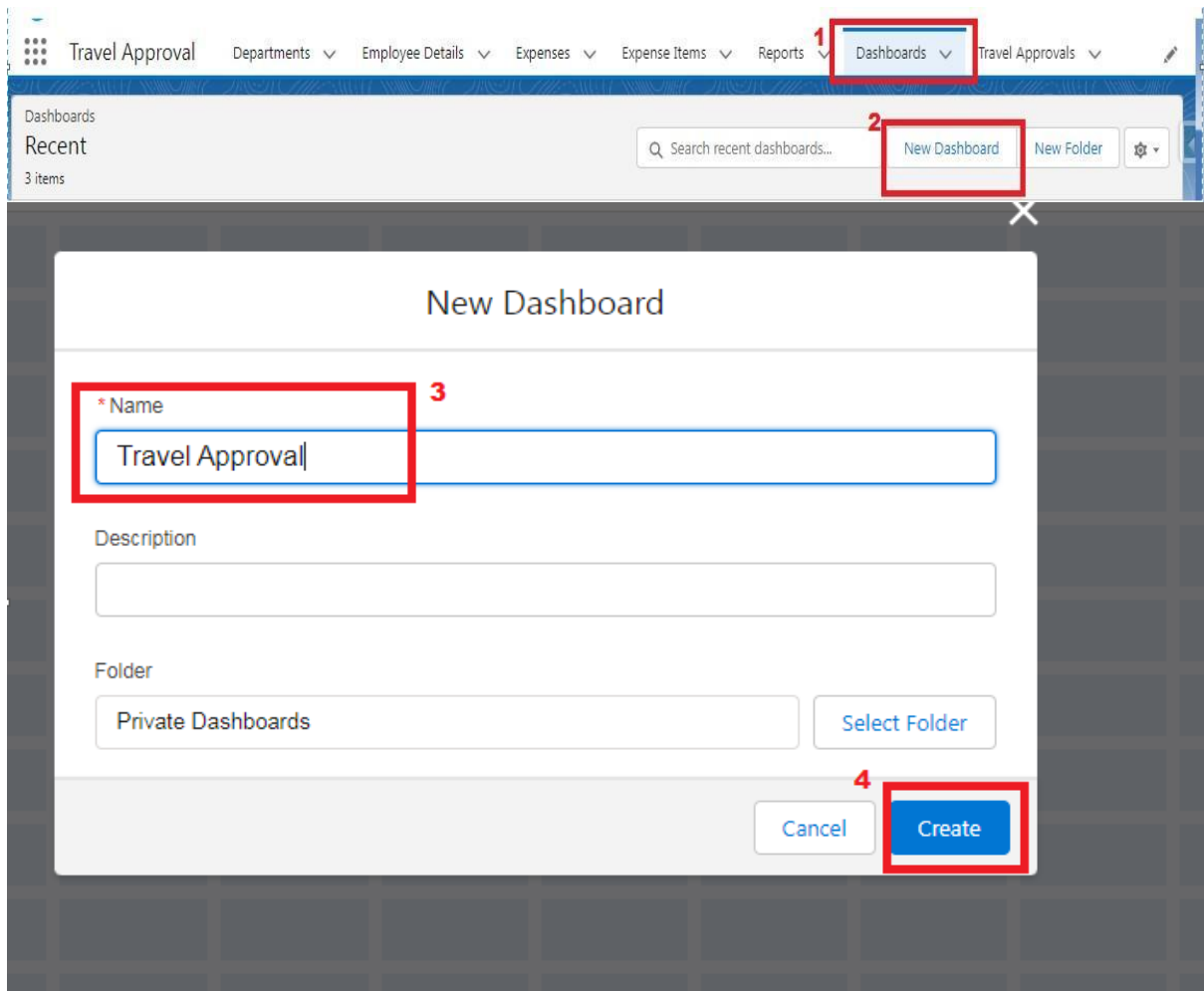
Give your dashboard a name and click on +component,

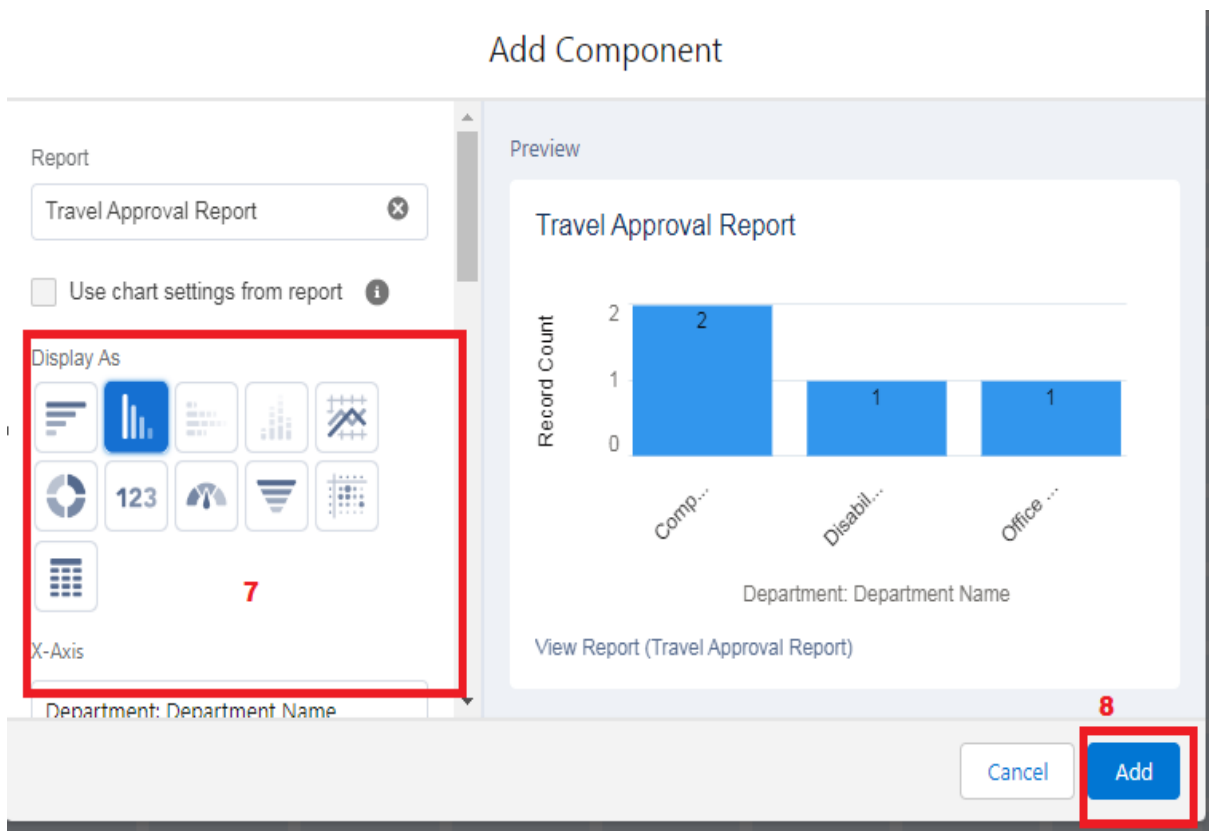
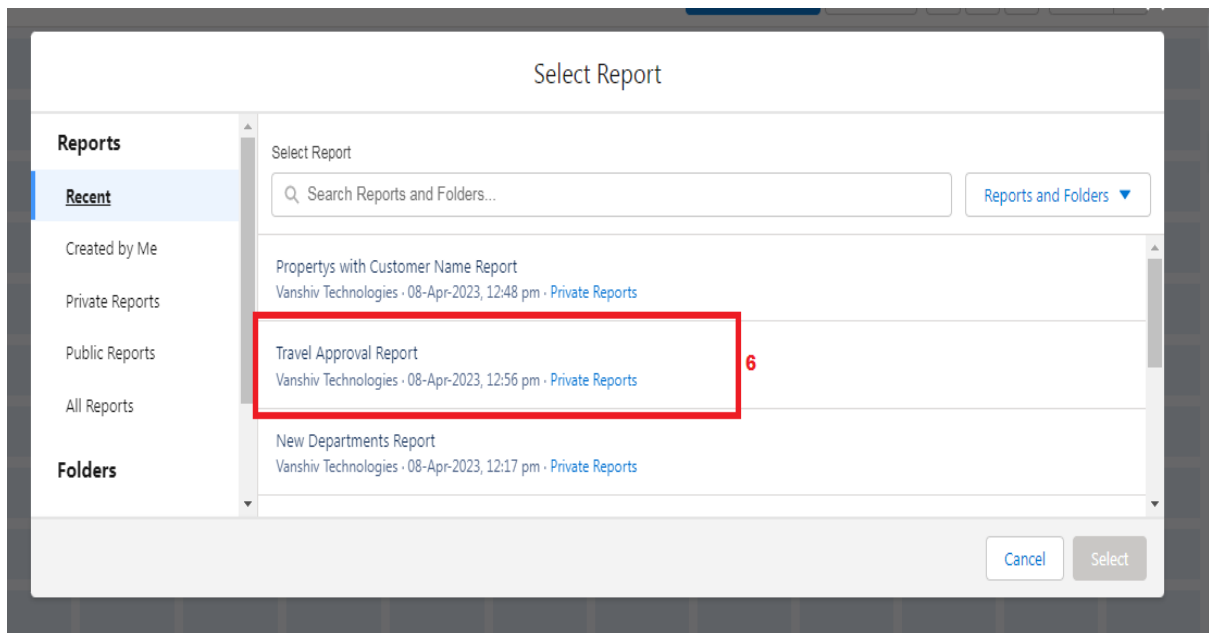
select the Travel Approval Report that you created.

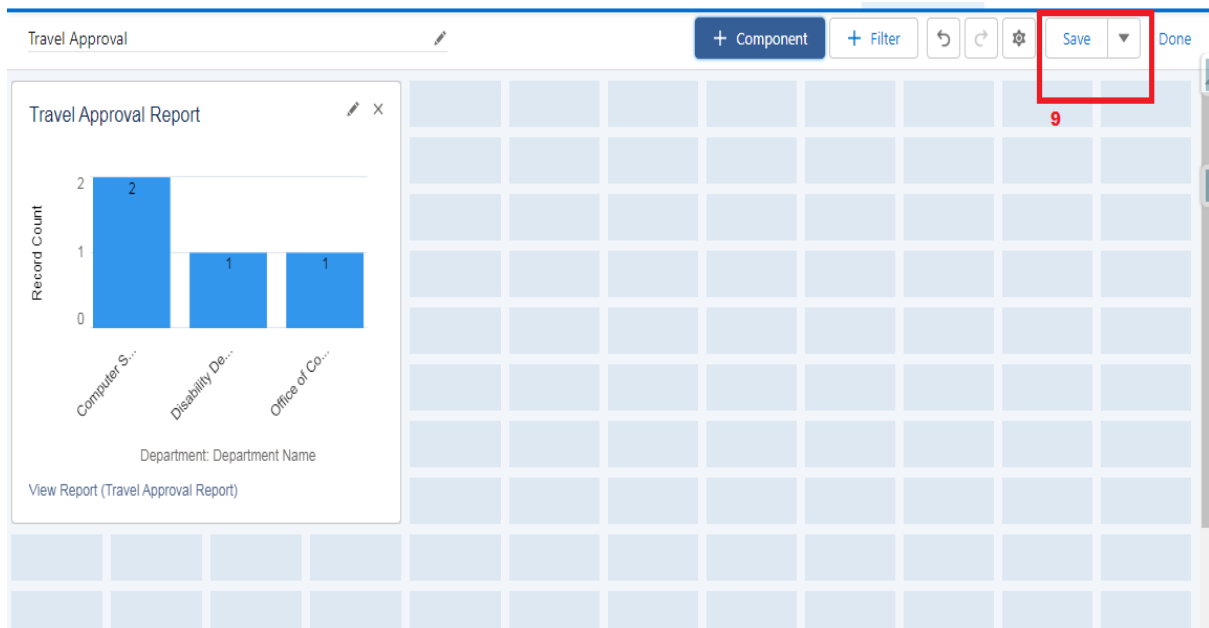
For the data visualization select any of the chart, table etc as your wish.

Click add

Click save.

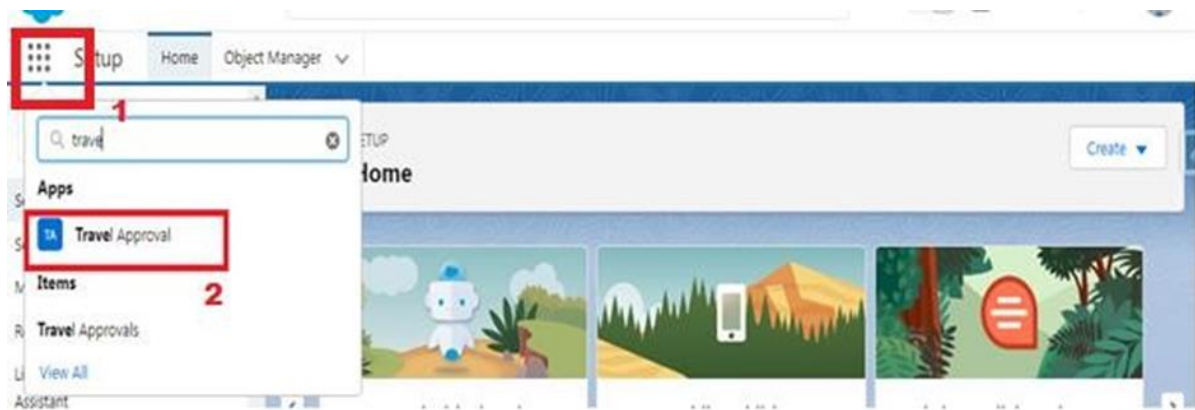






View Dashboard

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





Q Search...



Travel Approval

Departments

Employee Details

Expenses

Expense Items

Reports

Dashboards

Travel Approvals

Dashboards

Recent

8 items

Q Search recent dashboards...

New Dashboard

New Folder



DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Propertyys with Customer Name Report		Private Dashboards		8/4/2023, 12:58 pm	
Created by Me	Job application with candidate name		Private Dashboards		8/4/2023, 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	
FOLDERS	Travel Approval		Private Dashboards		8/4/2023, 12:58 pm	
All Folders	Employee Travel detail		Private Dashboards		8/4/2023, 12:22 pm	
Created by Me	Opportunity And Dashboard		Private Dashboards		4/4/2023, 1:55 am	
Shared with Me						