

NAAN MUDHALVAN

SALESFORCE PROJECT REPORT

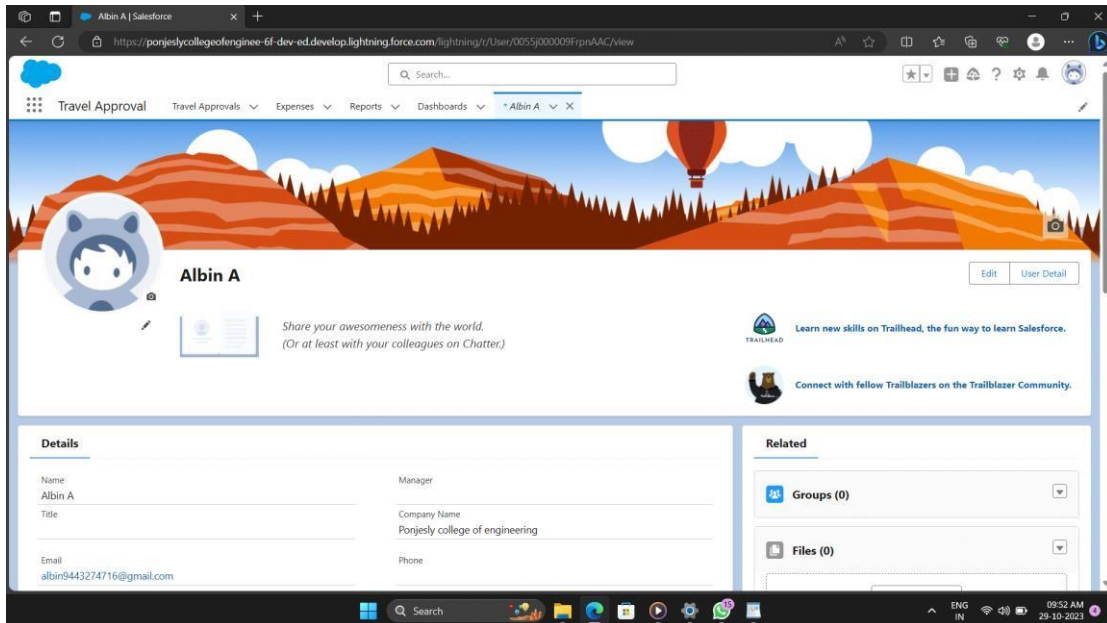
COLLEGE : PONJESLY COLLEGE OF ENGINEERING

BATCH-20

PROJECT TITLE :TRAVEL APPROVAL BY USING SALES FORCE
DEVELOPMENT

NAME	Nm id	REG NO
A. ALBIN	4988261E2AF296C96B34E47C0F16D647	961820114305

Step 1: Create a Salesforce Account



Step 2: Create the objects (Department, Employee Detail, Expense, Expense Items, Travel Approval)

The image displays two screenshots of the Salesforce Object Manager interface, showing the process of creating custom objects.

Top Screenshot: Department Object

The interface shows the 'Object Manager' section with a search bar containing 'Depd'. Below the search bar, a table lists the objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Department	Department__c	Custom Object		16/10/2023	✓

Bottom Screenshot: Expense Object

The interface shows the 'Object Manager' section with a search bar containing 'Expense'. Below the search bar, a table lists the objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Expense	Expense__c	Custom Object		28/10/2023	✓

Object Manager | Salesforce

Search Setup

Setup Home Object Manager

Object Manager

1 Items, Sorted by Label

Employee Detail Employee_Detail__c Custom Object 28/10/2023 ✓

Object Manager | Salesforce

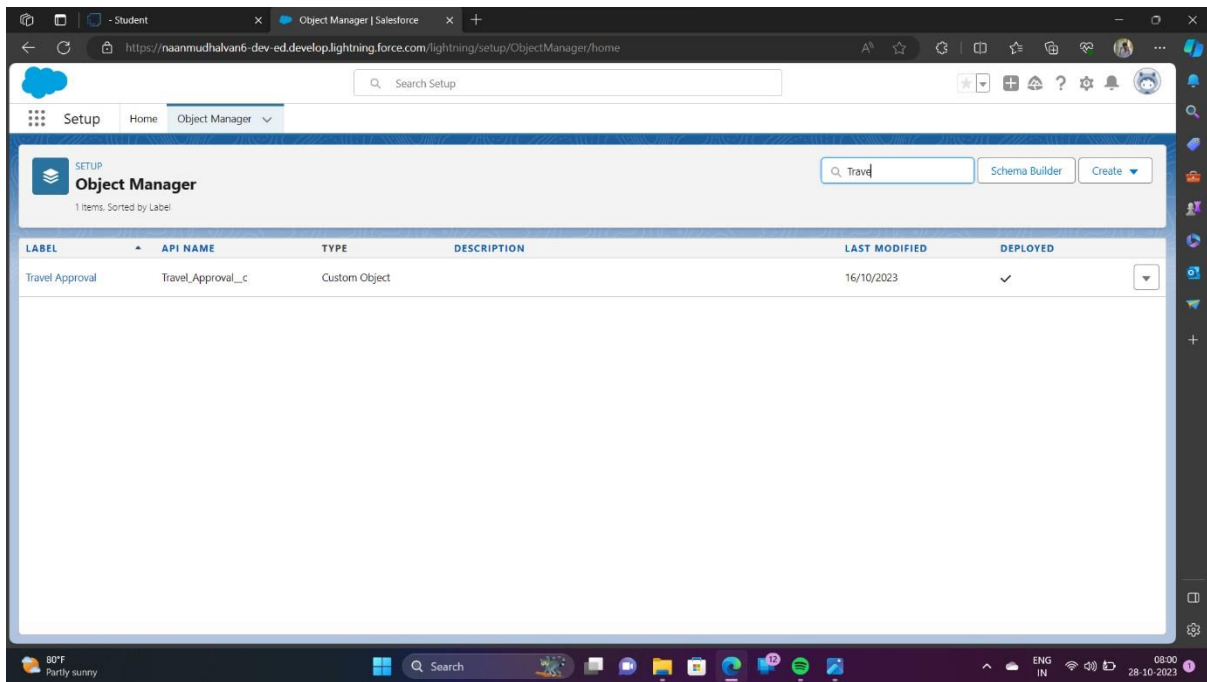
Search Setup

Setup Home Object Manager

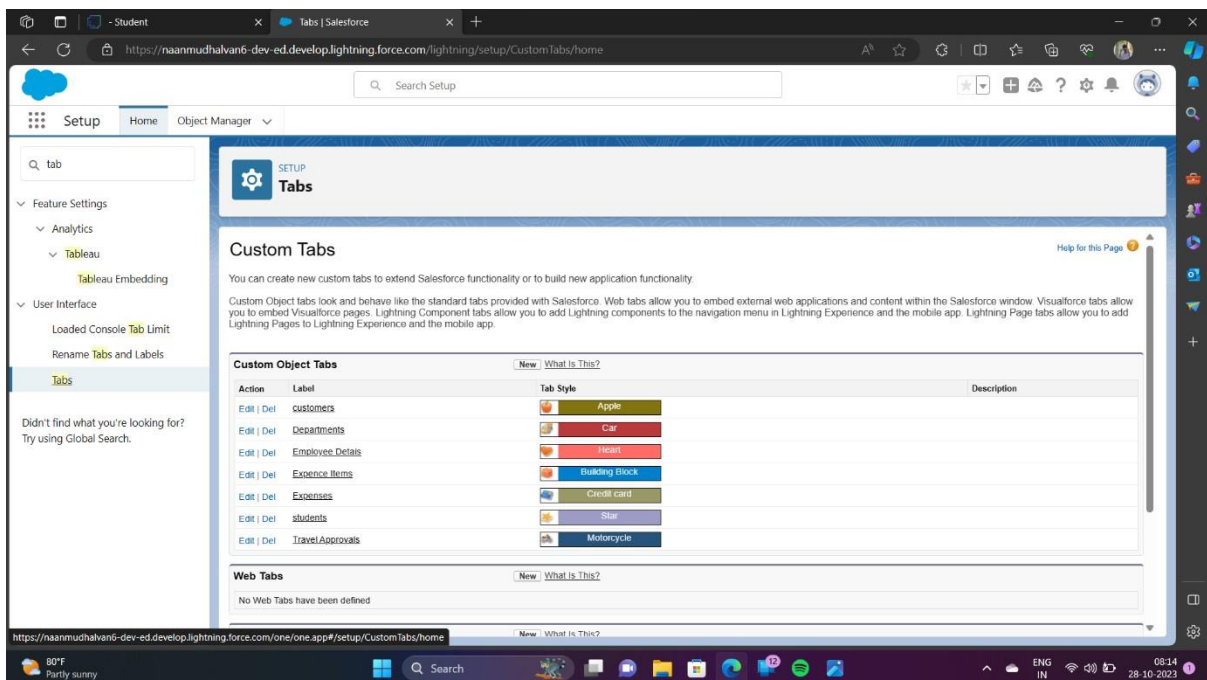
Object Manager

1 Items, Sorted by Label

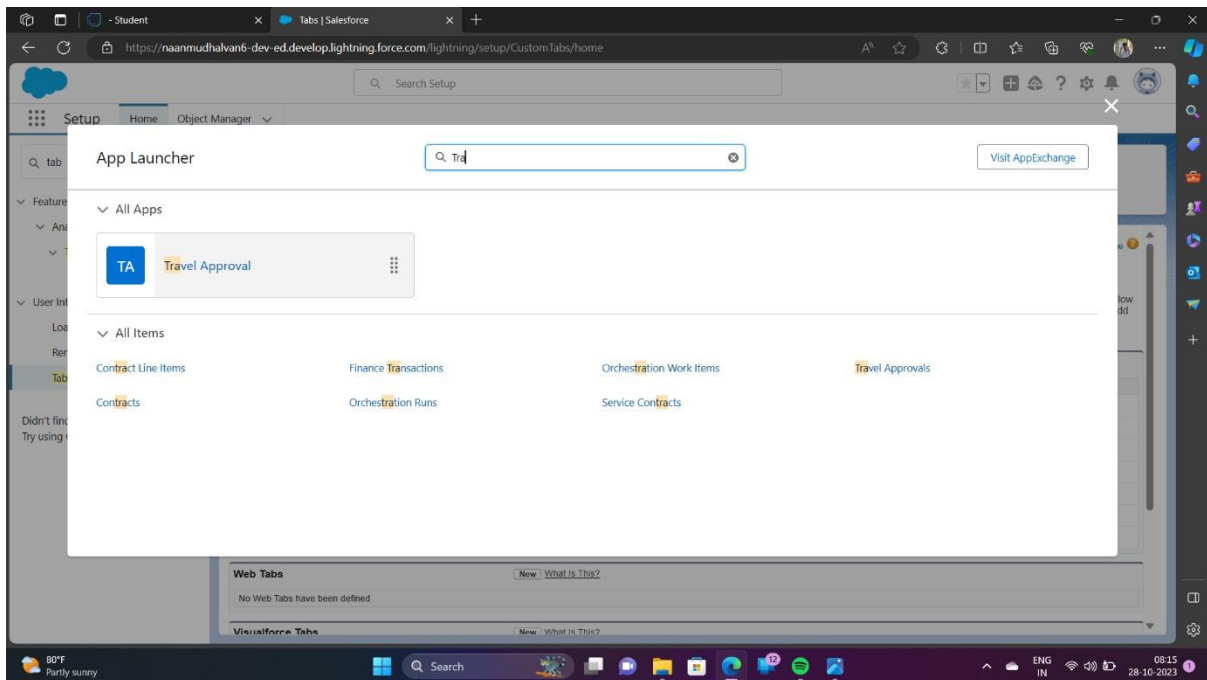
Expe Item Expe_Item__c Custom Object 16/10/2023 ✓



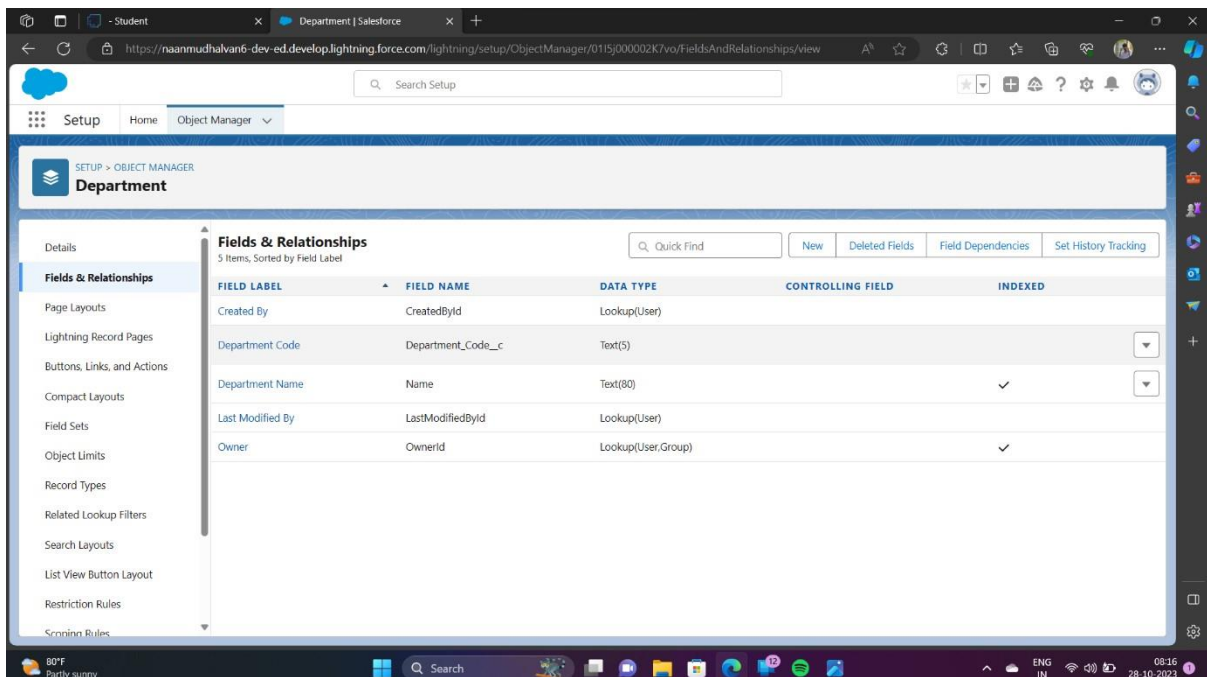
Step 3: Create the Tabs for each objects (Department, Employee Detail, Expense, Expense Items, Travel Approval)



Step 4: Create a Lightning App



Step 5: Create the Fields & Relationship for each objects (Department, Employee Detail, Expense, Expense Items, Travel Approval)



Student Employee Detail | Salesforce

https://naanmudhalvan6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002zfsG/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Employee Detail

Details

Fields & Relationships 8 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)		
Date of Birth	Date_of_Birth__c	Date		
Department	Department__c	Lookup(Department)		✓
Emp Name	Name	Text(80)		✓
Employee id	Employee_id__c	Text(12)		
Gender	Gender__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

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 Scrolling Rules

Student Expense Item | Salesforce

https://naanmudhalvan6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002K7xa/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Expense Item

Details

Fields & Relationships 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
Created By	CreatedById	Lookup(User)		
Expense Item Name	Name	Text(80)		✓
Expense	Expense__c	Master-Detail(Expense)		✓
Expense Type	Expense_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Travel Approval	Travel_Approval__c	Master-Detail(Travel Approval)		✓

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 Scrolling Rules

Expense | Salesforce

https://naanmudhalvan6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002zfsV/FieldsAndRelationships/view

Setup Home Object Manager

Expense

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)		
Employee Detail	Employee_Detail__c	Lookup(Employee Detail)		✓
Expense Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

80°F Partly sunny

Travel Approval | Salesforce

https://naanmudhalvan6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002K7ww/FieldsAndRelationships/view

Setup Home Object Manager

Travel Approval

Details

Fields & Relationships

13 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Amount	Amount__c	Currency(10, 0)		
Created By	CreatedById	Lookup(User)		
Destination state	Destination_state__c	Text(40)		
Employee Detail	Employee_Detail__c	Lookup(Employee Detail)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Out-of-state	Out_of_state__c	Checkbox		
Purpose of trip	Purpose_of_trip__c	Text(255)		
Status	Status__c	Picklist		
Total Expenses	Total_Expenses__c	Roll-Up Summary (MIN Expense Item)		
Travel Approval Name	Name	Text(80)		✓

81°F Partly sunny