

NAAN MUDHALVAN

SALESFORCE PROJECT REPORT

COLLEGE : PONJESLY COLLEGE OF ENGINEERING

BATCH-20

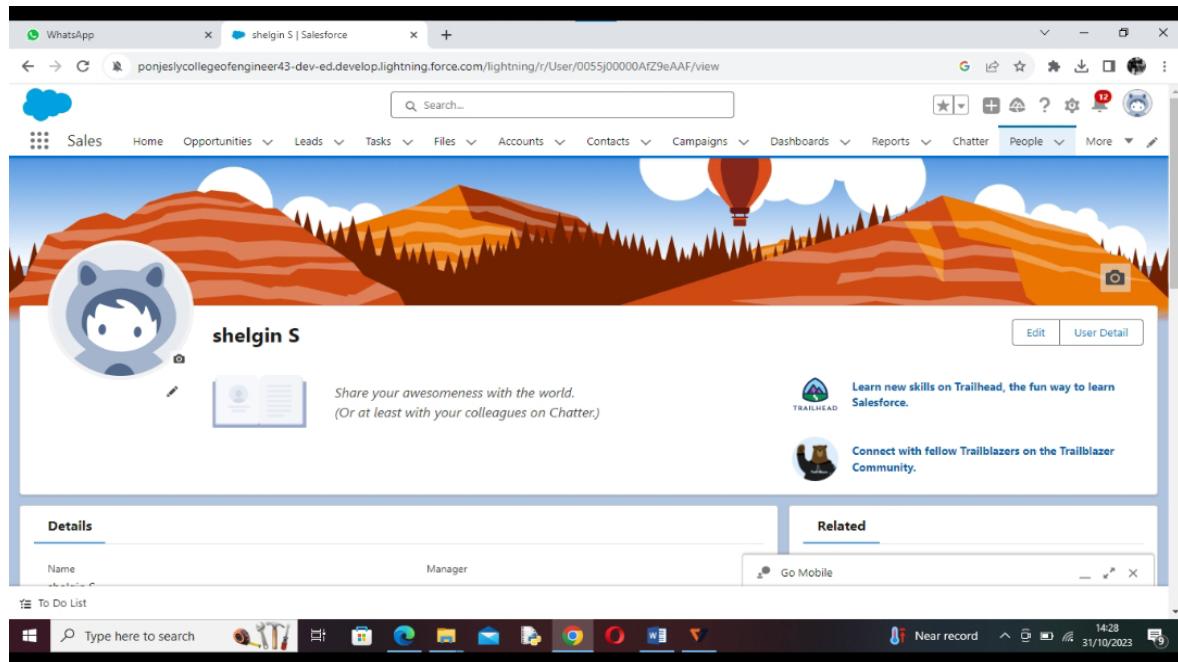
**PROJECT TITLE :TRAVEL APPROVAL BY USING SALES FORCE
DEVELOPMENT**

NAME	Nm id	REG NO
SHELGIN.S	DBB6E4319A6EC8F928C410B58B37F5D5	961820114062



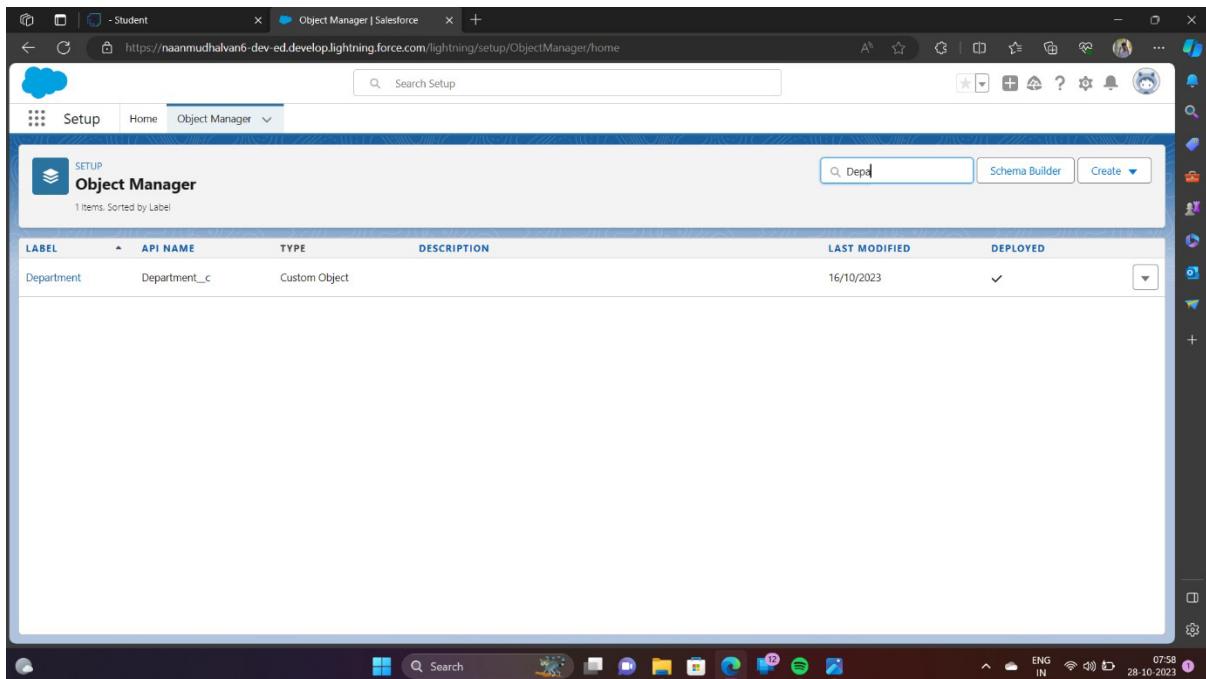
Edit with WPS Office

Step 1: Create a Salesforce Account



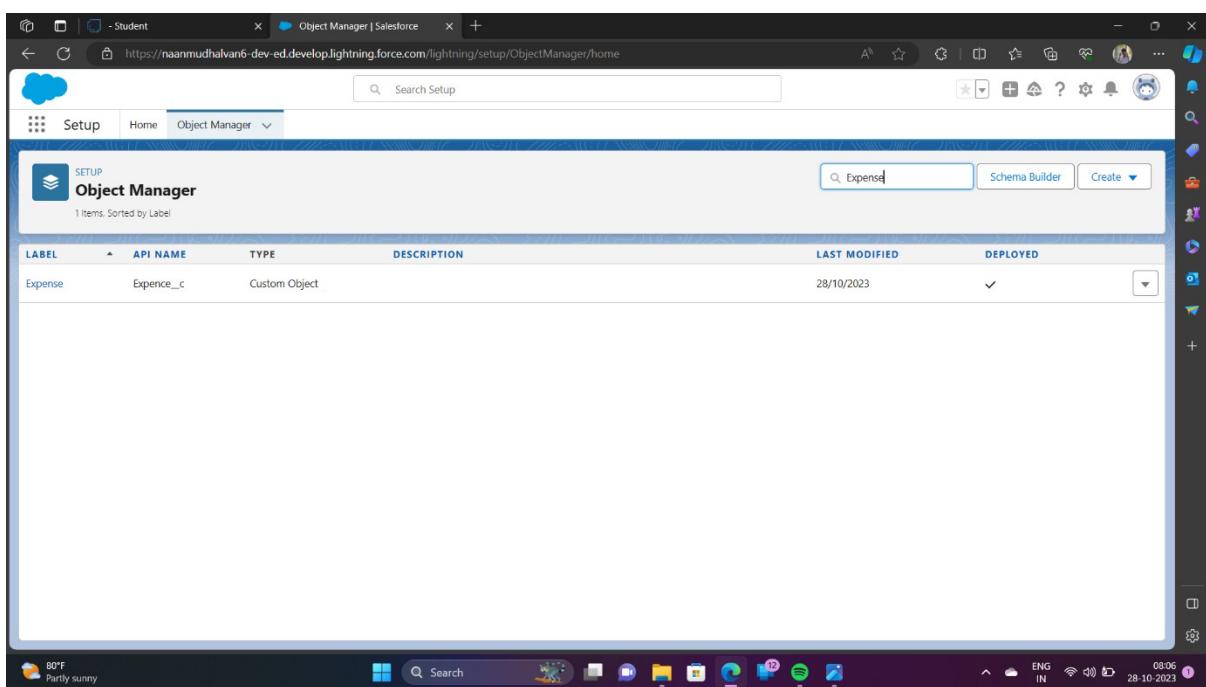
Edit with WPS Office

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



The screenshot shows the Salesforce Object Manager interface. A search bar at the top right contains the text "Dep". Below it, a table lists one object: "Department" with API name "Department_c", Type "Custom Object", Last Modified on "16/10/2023", and Deployed status checked. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

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

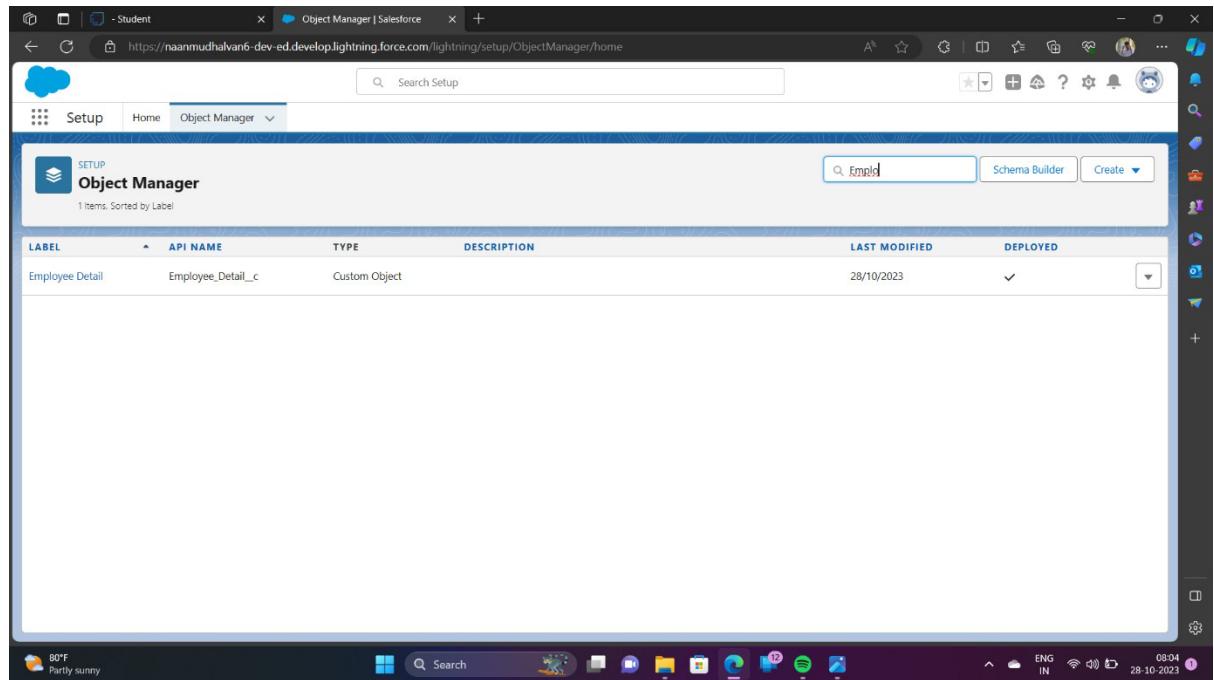


The screenshot shows the Salesforce Object Manager interface. A search bar at the top right contains the text "Expense". Below it, a table lists one object: "Expense" with API name "Expence_c", Type "Custom Object", Last Modified on "28/10/2023", and Deployed status checked. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

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

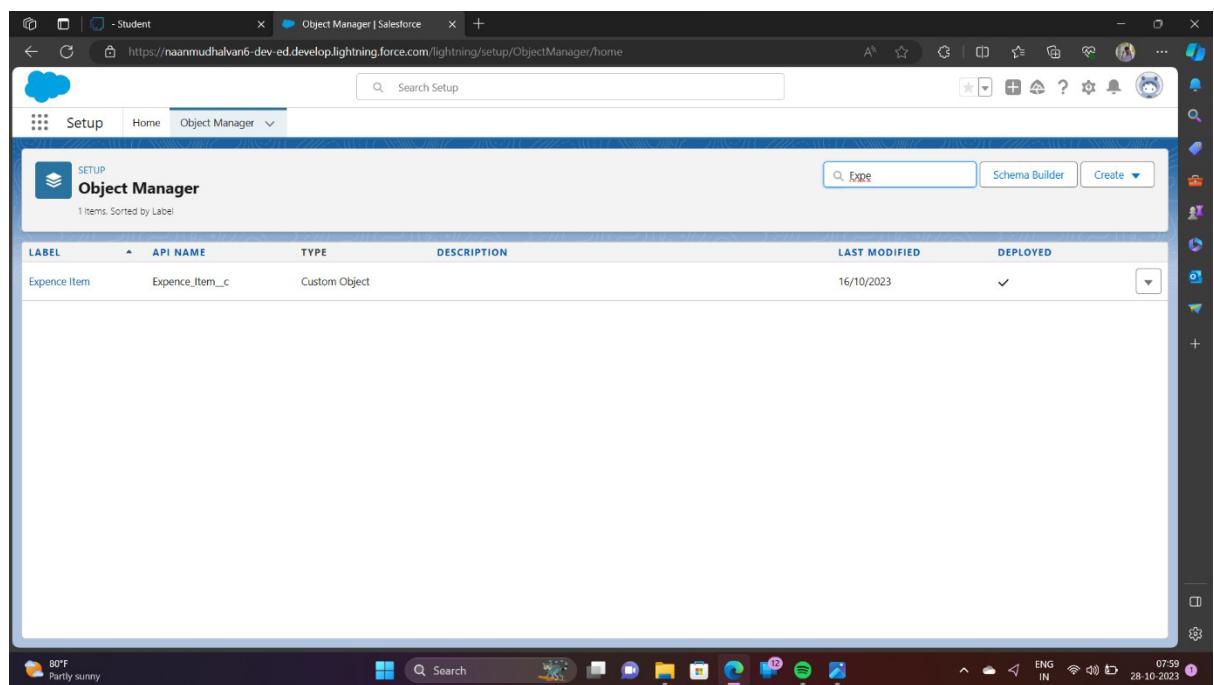


Edit with WPS Office



The screenshot shows the Salesforce Object Manager interface. The URL is <https://naanmudhalvan6-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home>. The search bar at the top contains "Employee". The main table displays one object:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Employee Detail	Employee_Detail_c	Custom Object		28/10/2023	✓



The screenshot shows the Salesforce Object Manager interface. The URL is <https://naanmudhalvan6-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home>. The search bar at the top contains "Expence". The main table displays one object:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Expence Item	Expence_Item_c	Custom Object		16/10/2023	✓



Edit with WPS Office

The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. The main area is titled 'Object Manager' and shows a table with one item: 'Travel Approval' (Label), 'Travel_Approval_c' (API Name), 'Custom Object' (Type), and '16/10/2023' (Last Modified). A checkmark icon is next to 'Deployed'. The bottom status bar shows it's 8:00 AM, ENG IN, and the date is 28-10-2023.

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

The screenshot shows the Salesforce Custom Tabs page. On the left, there's a sidebar with 'Feature Settings' (Analytics, Tableau, Tableau Embedding, User Interface), 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs' (which is selected). The main area is titled 'Custom Tabs' and contains two sections: 'Custom Object Tabs' and 'Web Tabs'. Under 'Custom Object Tabs', there is a table with the following data:

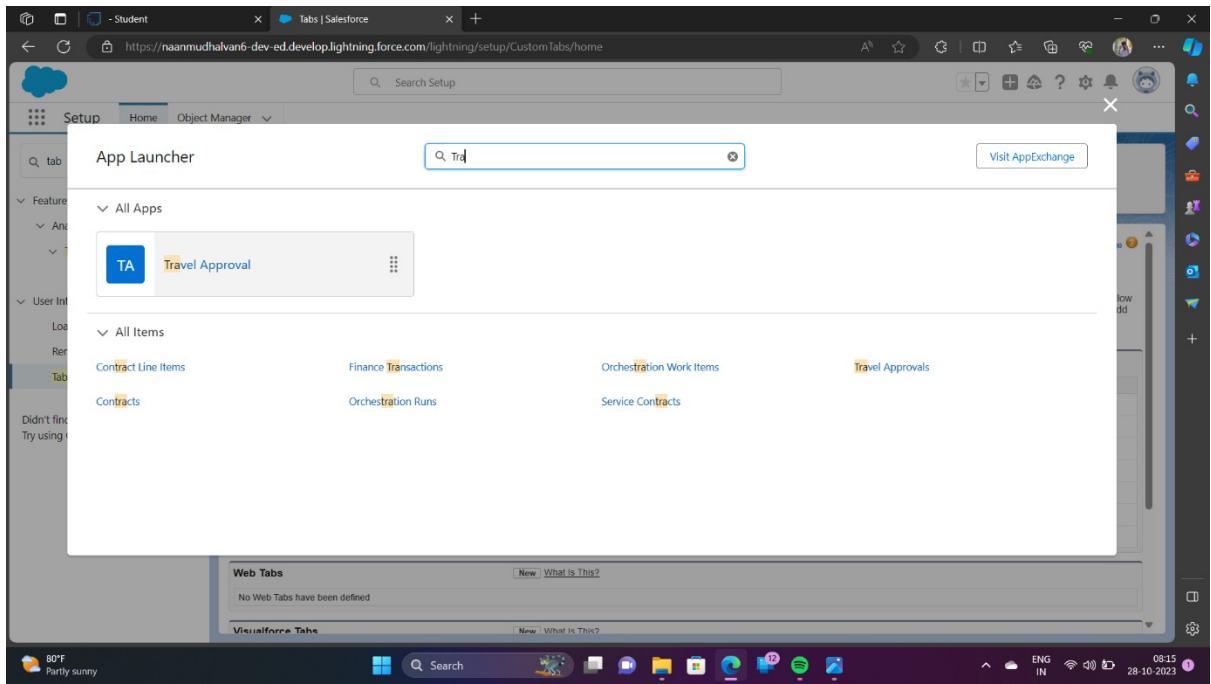
Action	Label	Tab Style	Description
Edit Del	customers	Apple	
Edit Del	Departments	Car	
Edit Del	Employee Details	Heart	
Edit Del	Expense Items	Building Block	
Edit Del	Expenses	Credit card	
Edit Del	students	Star	
Edit Del	Travel Approvals	Motorcycle	

Under 'Web Tabs', it says 'No Web Tabs have been defined'.



Edit with WPS Office

Step 4: Create a Lightning App



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



Edit with WPS Office

The screenshot shows the Salesforce Setup interface with the URL <https://naanmudhalvan6-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015j000002K7vo/FieldsAndRelationships/view>. The page title is "Department | Salesforce". The main content area is titled "Fields & Relationships" and displays a table of fields for the "Department" object. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department Code	Department_Code__c	Text(5)		
Department Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

The left sidebar lists various setup options under "Fields & Relationships". The bottom status bar shows weather (80°F, Partly sunny), system info (ENG IN), and date (28-10-2023).

The screenshot shows the Salesforce Setup interface with the URL <https://naanmudhalvan6-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015j000002zsG/FieldsAndRelationships/view>. The page title is "Employee Detail | Salesforce". The main content area is titled "Fields & Relationships" and displays a table of fields for the "Employee Detail" object. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

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)		✓

The left sidebar lists various setup options under "Fields & Relationships". The bottom status bar shows weather (80°F, Partly sunny), system info (ENG IN), and date (28-10-2023).



Edit with WPS Office

The screenshot shows the Salesforce Object Manager interface for the 'Expence Item' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays the 'Fields & Relationships' section, which lists six fields: Created By, Expence Item Name, Expense, Expense Type, Last Modified By, and Travel Approval. Each field is defined by its label, name, data type, controlling field, and indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Expence 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)		✓

The screenshot shows the Salesforce Object Manager interface for the 'Expense' object. The left sidebar lists various setup options. The main content area displays the 'Fields & Relationships' section, which lists five fields: Created By, Employee Detail, Expence Name, Last Modified By, and Owner. Each field is defined by its label, name, data type, controlling field, and indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee Detail	Employee_Detail__c	Lookup(Employee Detail)		✓
Expence Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓



Edit with WPS Office

The screenshot shows the Salesforce Object Manager interface for the 'Travel Approval' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Fields & Relationships' and displays 13 items, sorted by Field Label. Each item shows the field name, its type, and its description. The fields listed are:

Field	Type	Description
Amount	Currency(10, 0)	
Created By	Lookup(User)	
Destination state	Text(40)	
Employee Detail	Lookup(Employee Detail)	
Last Modified By	Lookup(User)	
Out-of-state	Checkbox	
Purpose of trip	Text(255)	
Status	Picklist	
Total Expenses	Roll-Up Summary (MIN Expence Item)	
Travel Approval Name	Name	Text(80)



Edit with WPS Office