

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
SUJITH.S	7B755885C164694BA554F420831EB585	961820114065



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Step 1: Create a Salesforce Account

The screenshot shows a Salesforce user profile page for 'Sujith S'. The top navigation bar includes links for Consultant Dash, Student, Haritha H R | Sales, Internal result | S, Sakthivel K | Sales, Verify Your Identity, NITHIN R J | Sales, and Sujith S | Sales. The main header features a blue cloud icon and the word 'Sales'. Below the header is a decorative banner with mountains and a hot air balloon.

The user profile section displays a circular profile picture of a cartoon character, the name 'Sujith S', and a button to 'Edit' or 'User Detail'. A call-to-action card encourages sharing awesomeness on Trailhead. Another card invites users to connect on the Trailblazer Community.

The 'Details' section contains the following information:

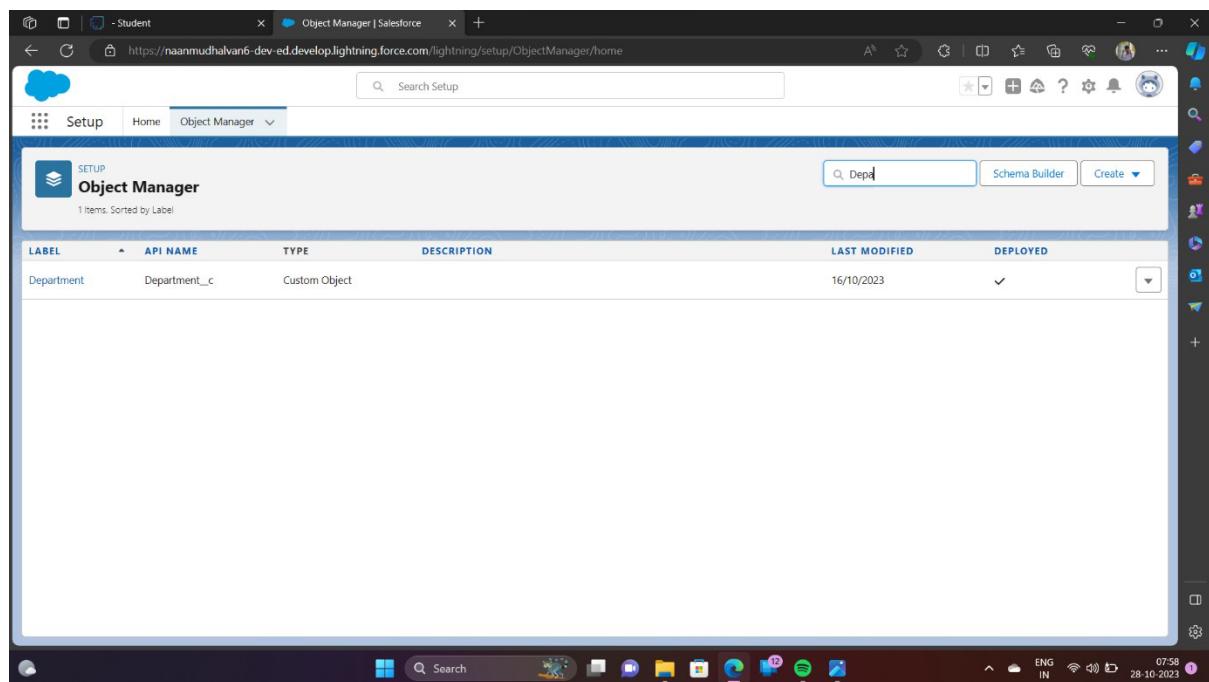
Name	Manager
Sujith S	
Title	Company Name
	Nana mudhalvan
Email	Phone
sujithsmass2002@gmail.com	
Address	Mobile
IN	

The 'Related' section shows 'Groups (0)' and 'Files (0)', with a 'Upload Files' button.



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



The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL <https://naanmudhalvan6-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home>. The page title is "Object Manager | Salesforce". The main content area is titled "Object Manager" and shows a table with one item: "Department". The table columns are labeled: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The "Department" entry has an API name of "Department__c", is a "Custom Object", was last modified on "16/10/2023", and has a checked "DEPLOYED" status. A search bar at the top right contains the text "Depa". The bottom of the screen shows a Windows taskbar with various pinned icons and system status indicators.

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



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The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with the placeholder "Search Setup". Below it, a navigation bar includes "Setup", "Home", and "Object Manager". The main area is titled "Object Manager" and displays a table with one item:

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

The status bar at the bottom indicates "80°F Partly sunny", "ENG IN", and the date "28-10-2023".

This screenshot is identical to the first one, showing the Salesforce Object Manager with a single custom object named "Employee Detail". The table data is as follows:

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

The status bar at the bottom indicates "80°F Partly sunny", "ENG IN", and the date "28-10-2023".



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The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. Below the navigation bar is a search bar labeled 'Search Setup' and a toolbar with various icons. The main area is titled 'Object Manager' and displays a table with one item. The table columns are 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The single item listed is 'Expence Item' with API name 'Expence_Item__c', type 'Custom Object', last modified on 16/10/2023, and deployed status checked. The bottom of the screen shows a Windows taskbar with various pinned icons and system status indicators.

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

This screenshot is identical to the one above it, showing the Salesforce Object Manager interface with a single custom object named 'Travel Approval' listed in the table. The table structure and data are the same: 'Label' is 'Travel Approval', 'API Name' is 'Travel_Approval__c', 'Type' is 'Custom Object', 'Last Modified' is 16/10/2023, and 'Deployed' is checked. The bottom of the screen shows a Windows taskbar with various pinned icons and system status indicators.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Travel Approval	Travel_Approval__c	Custom Object		16/10/2023	✓



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

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The left sidebar has 'Tabs' selected under 'Object Manager'. The main area displays a table of 'Custom Object Tabs' with columns for Action, Label, Tab Style, and Description. The table includes rows for customers, Departments, Employee Details, Expense Items, Expenses, students, and Travel Approvals, each with a unique icon. Below this is a section for 'Web Tabs' which is currently empty.

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	

Step 4: Create a Lightning App

The screenshot shows the Salesforce Setup interface with the 'App Launcher' page open. The left sidebar has 'Tabs' selected under 'Object Manager'. The main area displays the App Launcher with various app tiles. One tile for 'Travel Approval' is visible in the 'All Apps' section. Below it, under 'All Items', there are tiles for Contract Line Items, Finance Transactions, Orchestration Work Items, Travel Approvals, Contracts, Orchestration Runs, and Service Contracts.



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

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)		✓

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)		✓



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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)		✓



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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)



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