Build A Employee Travel Approval Application for corporates

INTRODUCTION

1.1 Over view

Real time salesforce project

Salesforce is your customer service

Designed to help you sell

Run your bussinessfrom anywhere

1.2 purpose

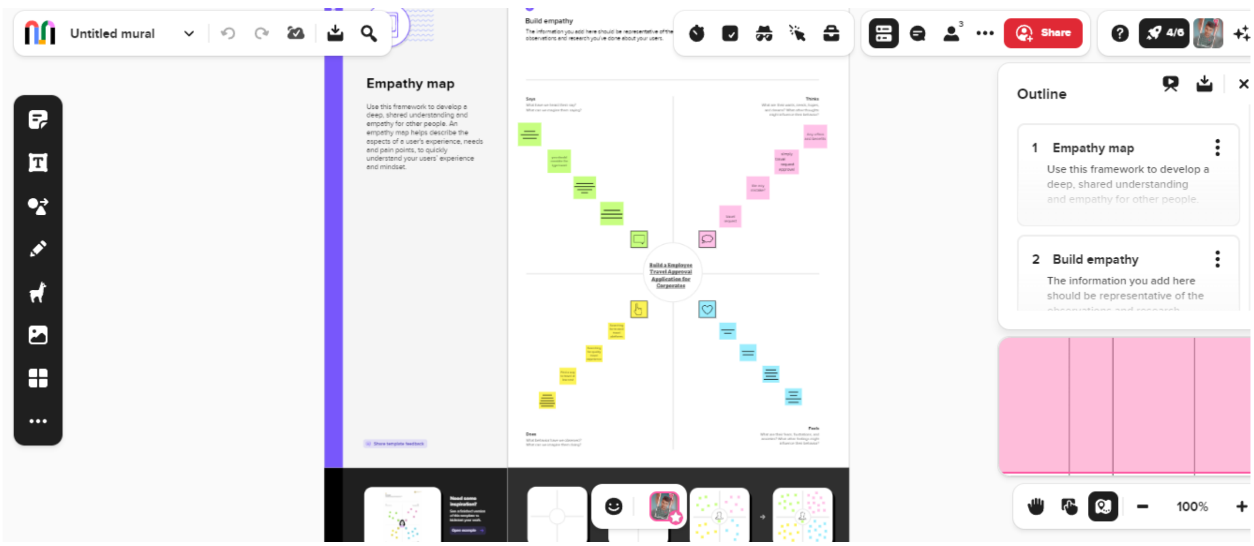
Object & relationship in salesforce

Work toware your batch

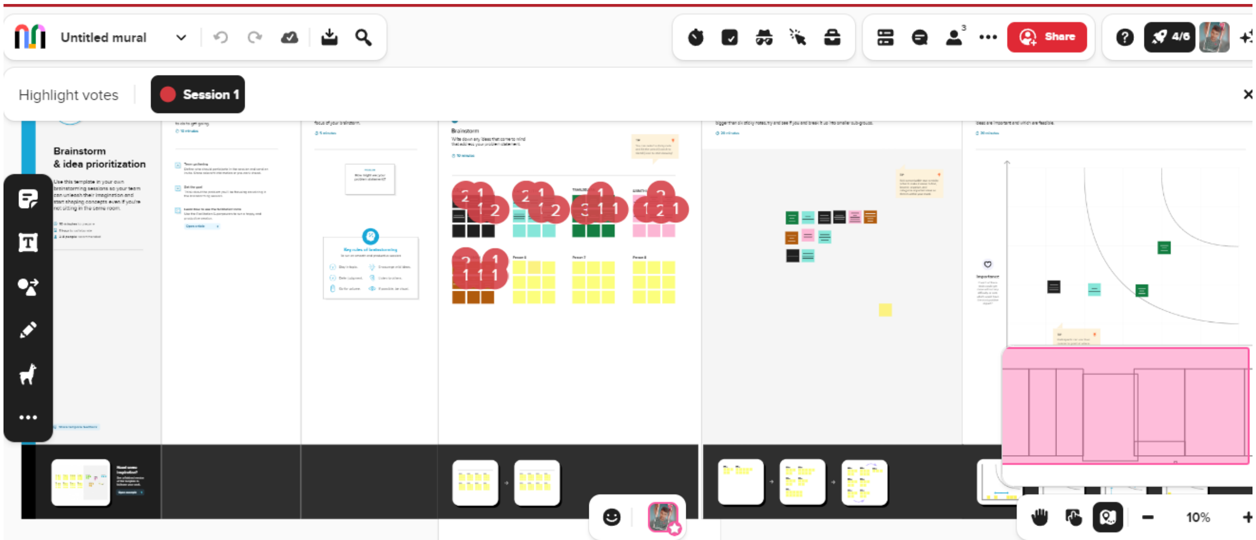
Manage relation ship with prospect

Data securily in the cloud

Empathy Map;



Brain strom Map;

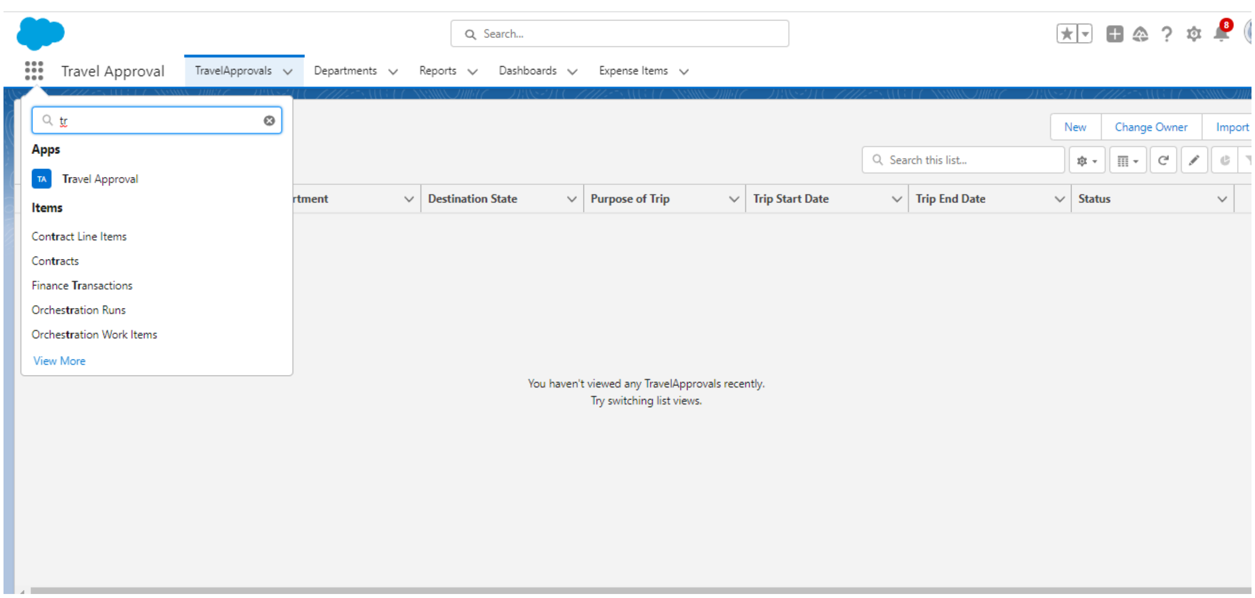


ACTIVITY & SCREEN SHOT

ACTIVITY 1:

Creating developer account

1.First name and last name
2.Email
3.Role:devoloper
4.company:college name
5.county:india
6.postal code:pincode
7.user name:should be a combination of your name and company this need not be an actual email id you can anything in the format

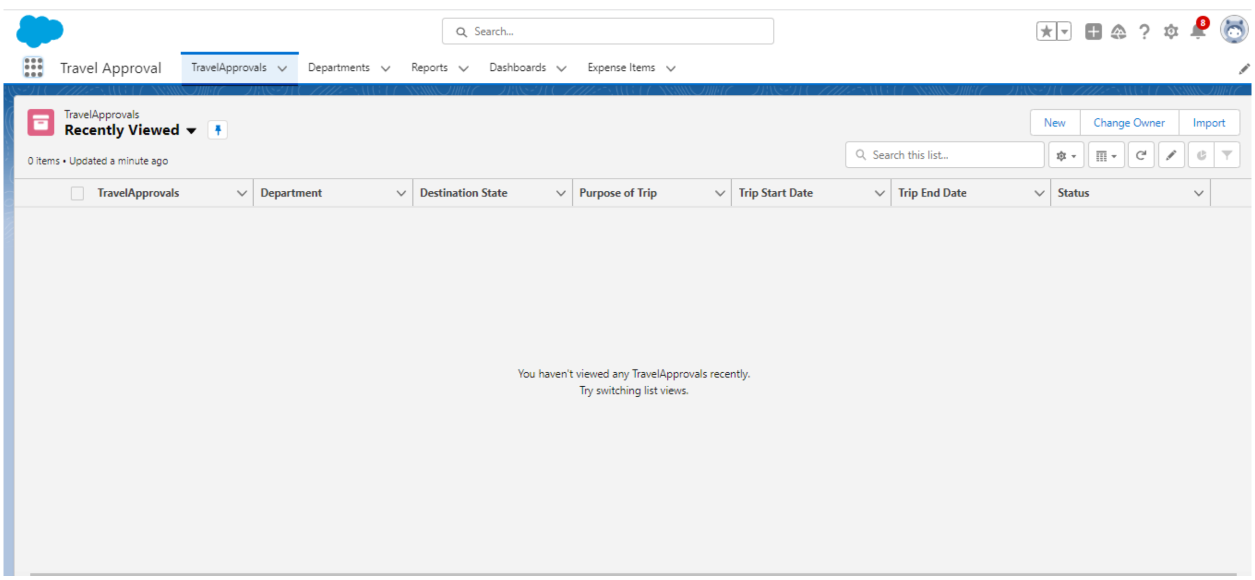


Activity-1:

Create the Travel Application
Search AppManager in quick find box, click on new lightning app. Before creating the application download this zip file and extract it.https://developer.salesforce.com/files/TravelAppWorkshopFiles.zip

Steps

- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter Travel Approval as the App Name, then click Next
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Department, Travel Approval, Expense Item, Reports, and Dashboards and move them to Selected Items. Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- To verify your changes, click the App Launcher, type Travel Approval and select the Travel Application app.



Activity-1:

Custom Object Creation

1.After you Login to your org, click create on the right side of the page and select custom object.

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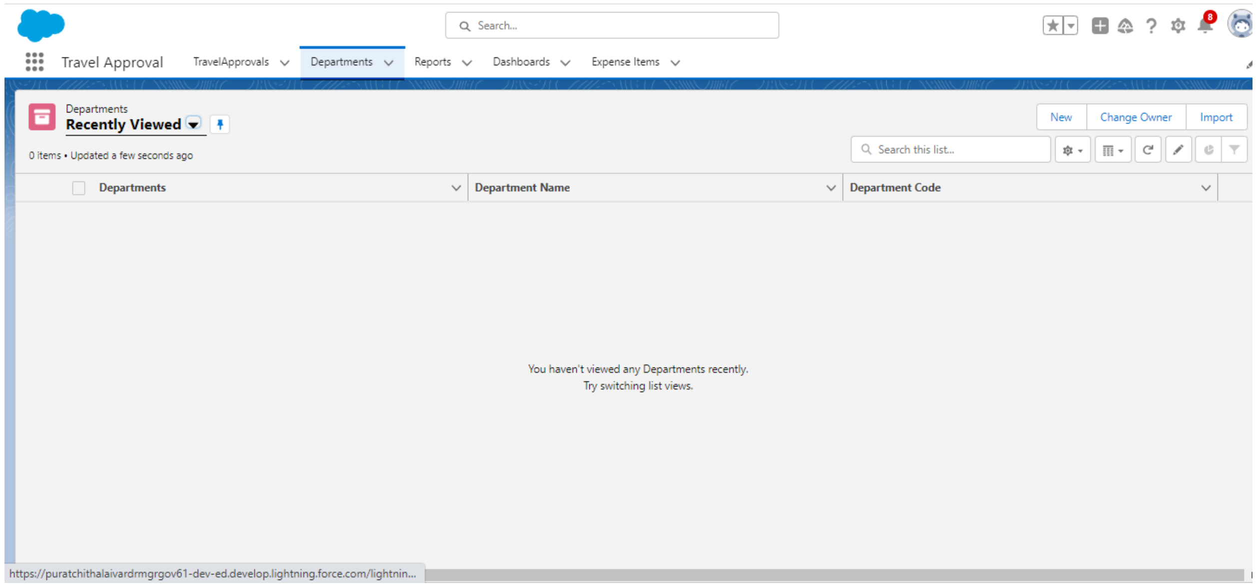
To create an object:

From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

On Custom object defining page:

Enter the label name, plural label name, click on Allow reports, Allow search → Save.



Activity-2:

Create 3 custom objects and tabs
a) Department
b) Travel Approval
c) Expense Item
Create Department Object
1.From Setup, click Object Manager.
2.Click Create, then select Custom Object.
3.Give the name as Department
To Navigate to Setup page:
Click on gear icon → click setup.
To create an object:
From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
On Custom object defining page:
Enter the label name, plural label name, click on Allow reports, Allow search → Save.
4.Now the tabs section opens, add this tab to the travel app.
Create Travel Approval Object
1.Navigate back to Object Manager
2. Click Create then select Custom Object.
3.Enter these details
Parameter
Value
Label
TravelApproval
Plural Label
TravelApprovals
Object Name
Travel_Approval (this field auto-populates)

Record Name
Travel Approval #
Datatype
Auto Number
DisplayFormat
TA-{00000}
Starting Number
1 4.Allow Reports, search, and launch a new tab and add this tab to the travel app.
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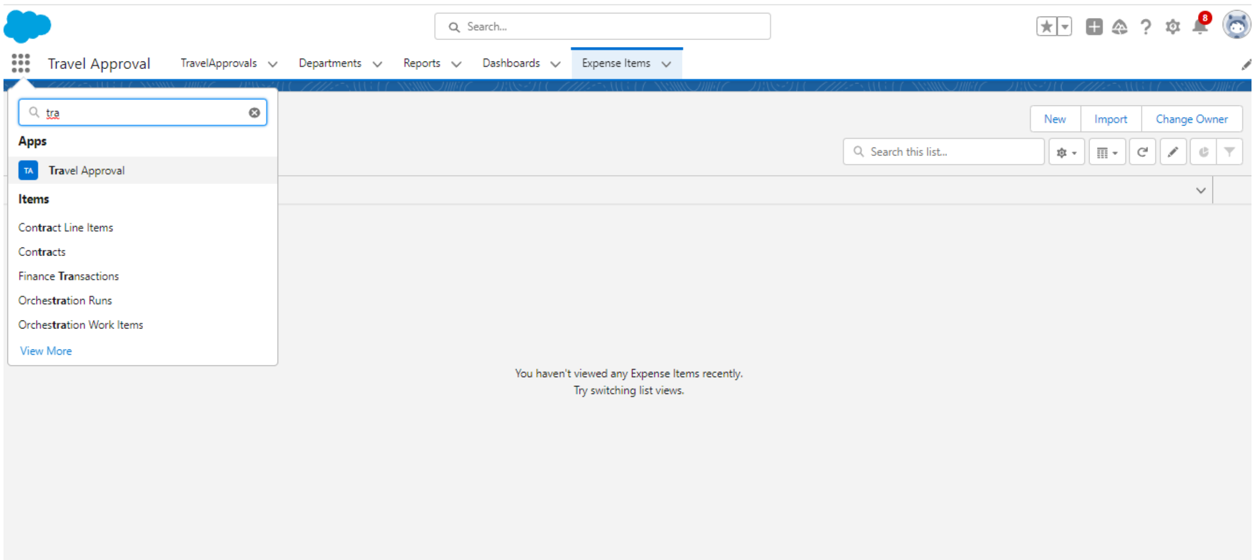
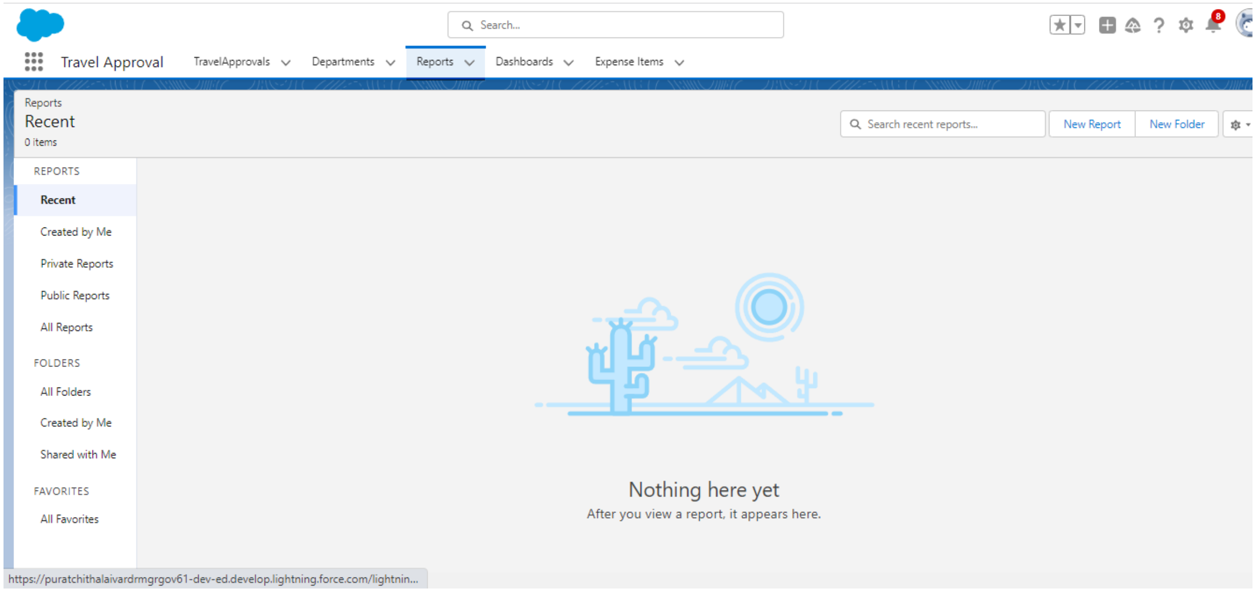


Activity-1:
Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.
1. For Object, select Event.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.
In the same way create other objects such as Attendees, Speaker and Vendor.
Activity-1:
1. Click Fields & Relationships, and click New.
2. For data type, select Currency.
3. Enter these details. a. For Field Label, enter Amount b. For Length, enter 16 c. For Decimal places, enter 2 d. Select Required
4. Click Next, Next, then Save & New.
Activit-2:
Create the Expense Type field.
• Select Picklist as the data type.
• Select Enter values, with each value separated by a new line.
• Add these values:(Airfare, Hotel, RentalCars, Meals,Others)
• Select Required.
• Click Next, Next, then Save & New.

Activit-3:
Create the Travel Approval field
. • Select Master-Detail Relationship data type, click Next.
• Select Travel Approval from the Related To menu.
• Click Next four times, then click Save.

Activity-1:
From Setup, click the Home tab.
1. In the Quick Find box, enter Data Import and select Data Import Wizard.
2. Click Launch Wizard!
Click the Custom Objects tab and select the Departments object
. 3. Next, select Add new records.
4. Drag and drop the Departments.csv file you downloaded using zip file or click the CSV icon and browse to select your file. Select Next.
5. 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.
6. The next screen gives you a summary of your data import. Click Start Import.
7. Click OK on the popup.
8. This takes you to the bulk import summary window that shows that the process has completed and 16 records have been successfully imported or processed. You'll also get an email notification confirming the import.
Activity-1:
Create User and Setup Approvals
1.Enter users in the quickfind box and select users.
2.Click new user .
3.Now give the name as you wish but the email must be real email address.
4.For username field follow the insstructions •
Firstname.<yourlastname>@<yourcompany>.com • …or create a username of your choice that should be unique
5.Give the role as CEO, Profile as System Administrator and license as Salesforce.
6.From Setup, enter Users in the Quick Find box and select Users.
7.Select your user account in the list provided. (Click on your name in the All Users list.)
8.Click Edit.
9.Scroll down to Approver Settings. Set your manager as the user you have created recently.

10.Click Save



Activity -1:

Customize Travel Approval Object Page layout

1.From the Object Manager, search for the travel approval object and click on page layouts and click edit.

2.Drag 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.

3.Name the section Trip Info, leave the rest of the settings at their default values, then click OK.

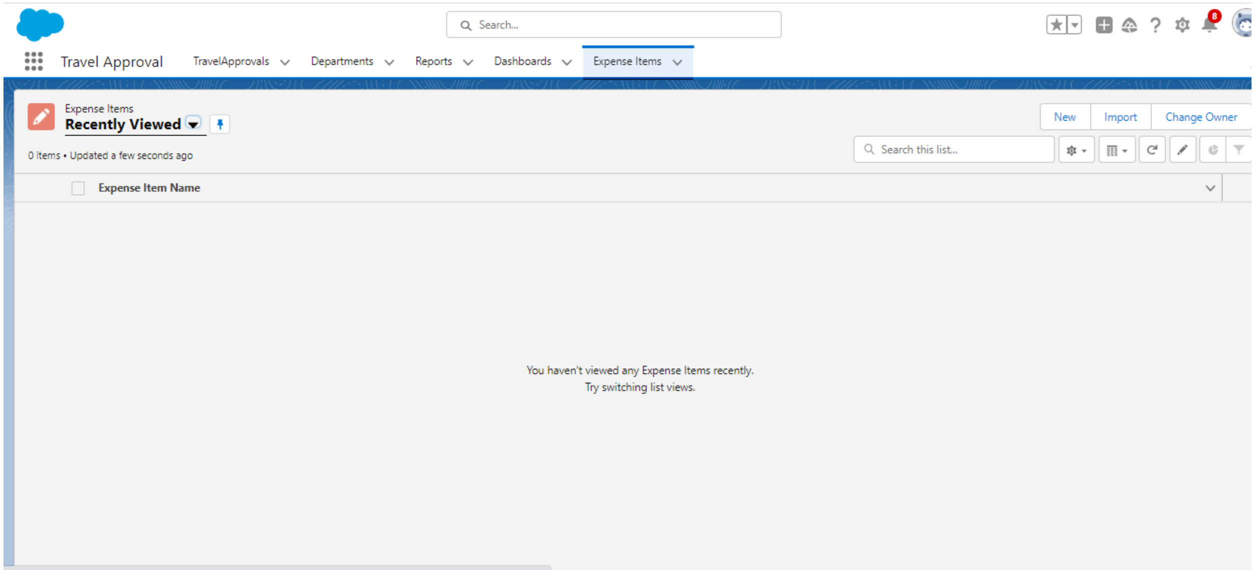
4. Drag the Purpose of Trip field from the Information section to the Trip Info section..

5.Drag Trip Start Date and Trip End Date from the top pane into the left-hand column of the Trip Info section.

6.Drag Out-of-State and Destination State from the top pane into the right-hand column of the Trip Info section.

7.Drag the Department field from the left-hand column of the Trip Info section to the right-hand column.

8.Click Save Note: You may need to refresh your browser screen for the changes to show up.



Activity-1:

Create Validation Rule

1.Search for the travel approval object from the object manager and open the object.

2.Click on validation rules and give your rule a name 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.

4.For error location select field and pick trip end date as the location for error.

Activity-2:

Create RollUp Summary Fields

1. From the Travel Approval object, select Fields & Relationships.
2. Click New.
3. Select the Roll-Up Summary data type.
4. Click Next.
5. Enter the following values for the field details o Field Label: Total Expenses o Field Name: Total_Expenses (this automatically gets set when you tab out of the Field Label field
6. Click Next.
7. Configure the roll-up calculation. o Summarized Object: Expense Items o Roll-Up Type: SUM o Field to Aggregate: Amount o Filter Criteria: All records should be included in the calculation
8. Click Next, Next, Save

Activity-3:

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 a file titled StatusImages.zip .
2. Click the Home tab to navigate back to the main setup page.
3. Click Custom Code | Static Resources (or enter Static in the Quick Find to filter down the options).
4. Click New.
5. Enter the following values for your static resource Parameter Value Name StatusImages File StatusImages.zip Cache Control Private

6. Now select the travel approval object.
7. Select Fields & Relationships.
8. Click New
9. Select Formula data type.
10. Click Next.
11. 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
12. Click Next.
13. Copy and paste the following formula into the formula editor. IF(ISPICKVAL(Status__c , 'Approved'), IMAGE("/resource/StatusImages/thumbs-up.png", "Accepted", 20, 20), IF (ISPICKVAL(Status__c , 'Rejected'), IMAGE("/resource/StatusImages/thumbs-down.png", "Rejected", 20, 20),IMAGE("/resource/StatusImages/draft.png", "In-Process", 20, 20)))
14.Click Next, Next, Save. Milestone 10-What are Reports? Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field. There are 4 types of report formats in Salesforce: 1. Tabular Reports: This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total. 2. Summary Reports: It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts. 3. Matrix Report: It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Char Activity Add Report

To create a report:
Go to the app → click on the reports tab
Click New Report
Select report type from category or from report type panel or from search panel → click on start report.
Customize your report, then save or run it.