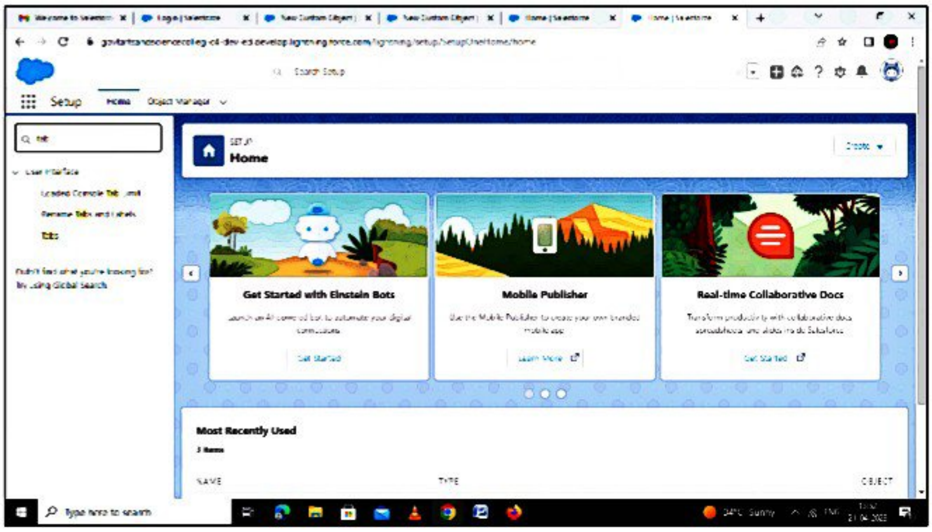
Go to inbox email used for while signing up. the verify account to activate your account. the email may take 5-10mins,as

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.



MILESTONE-2:

The app management is your go to place for managing apps for lightning experience.

ACTIVITY-1:

create the travel application

search app management in quick find the box,click on new lighting app.creating the application download this zip file and extract

it htts://developer.salesforce.com/files/travel/app workshopfiles .zip

ACTIVITY-1:

create the travel application

search app management in quick find the box,click on new lighting app.creating

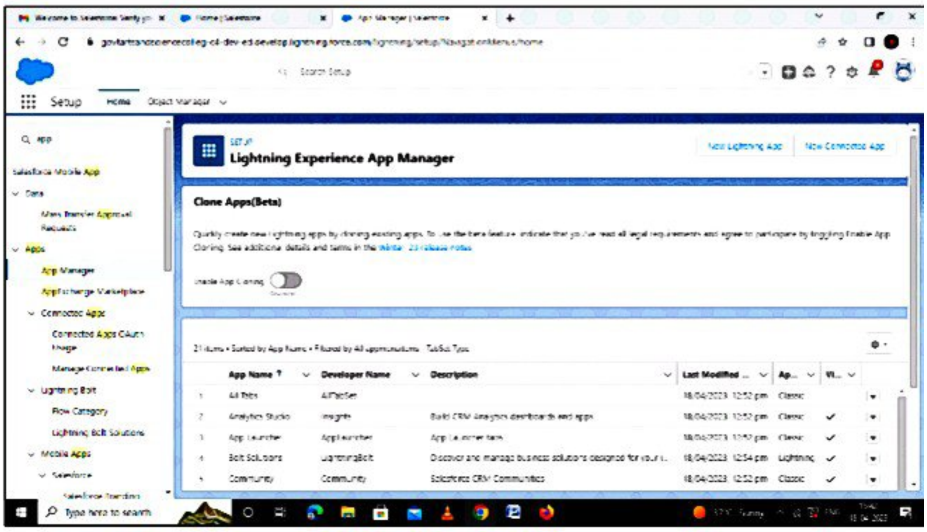
the application download this zip file and extract

it htts://developer.salesforce.com/files/travel/app workshopfiles .zip

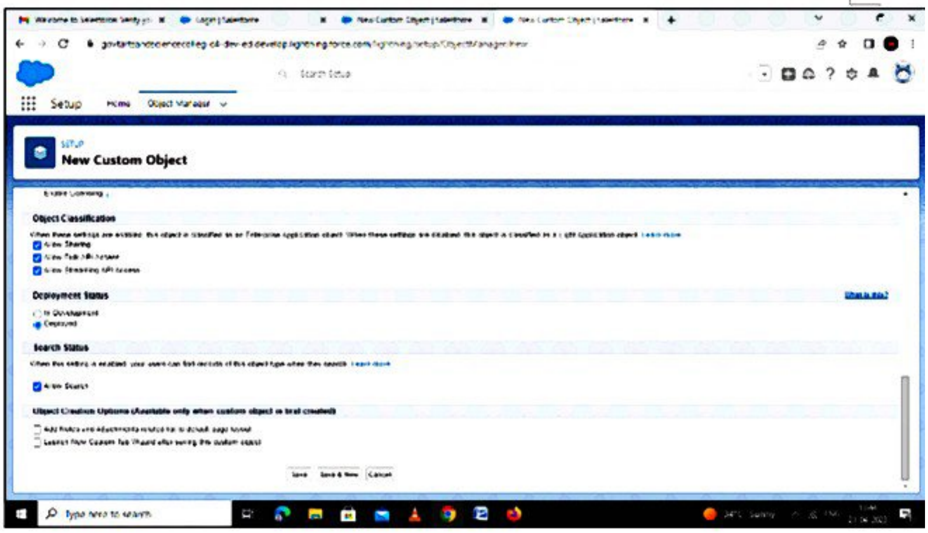
---

steps

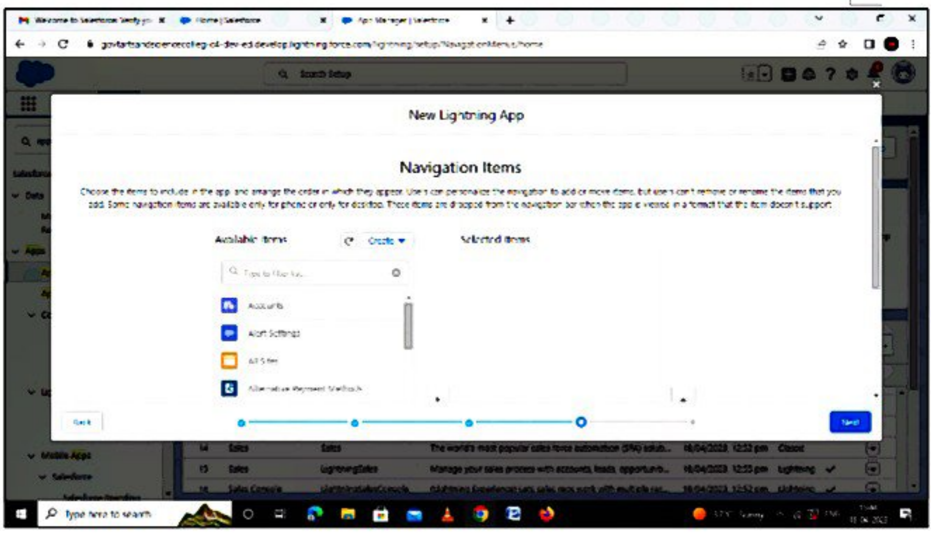
- from setup enter the app manager in the quick find and select app manager.



- click new lighting app.enter the travel approval as the app name,then the click next click next



- under app options ,leave the defult selections and click next.
- under the 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

MILESTONE -3:

Department

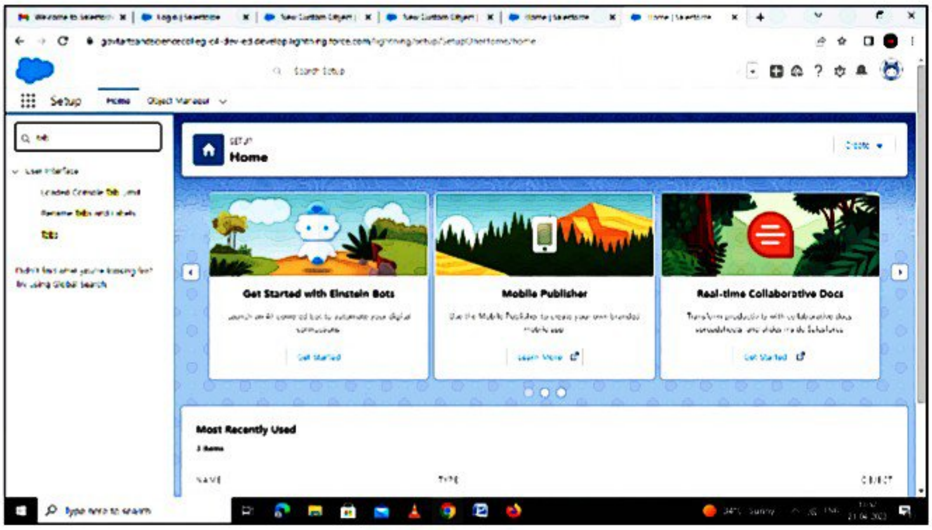
travel approval and expense item

salesforces types are database tabs

ACTIVITY-1:

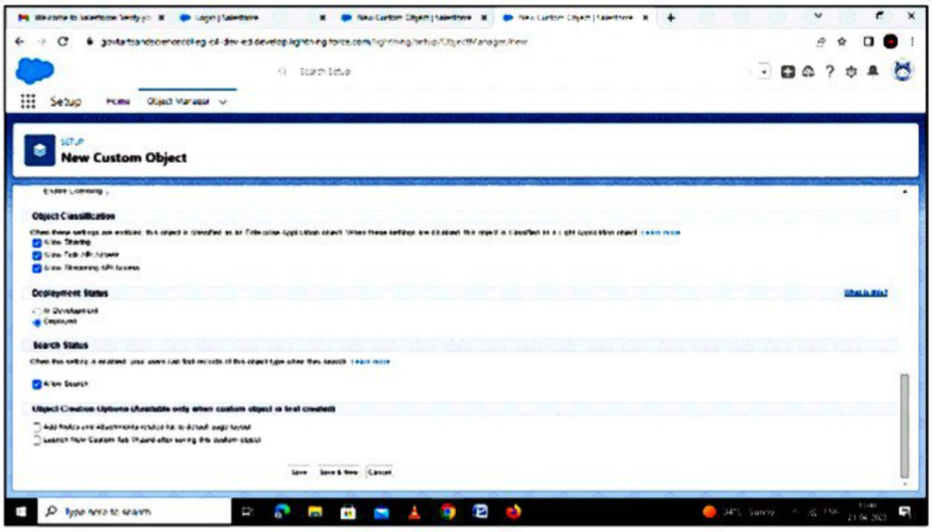
create object creation

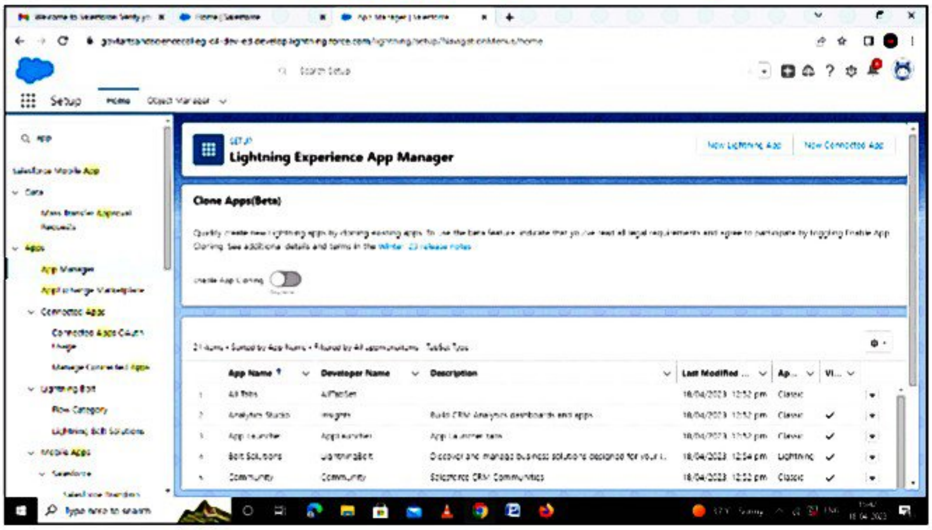
1.after you login to your org ,click create on the right side of the page and select custom object.



to create an object:

from the setup page ,click on object manager ,click on create ,click on custom object.





on custom object defining page:

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.fromsetup ,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 pages ,click on object manager ,click on custom object.

on custom object defining page:

enter the label name,plural 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 manger

2.click create ,then select custom object enter the label name,plural name,click on allow reports,allow search ,save.

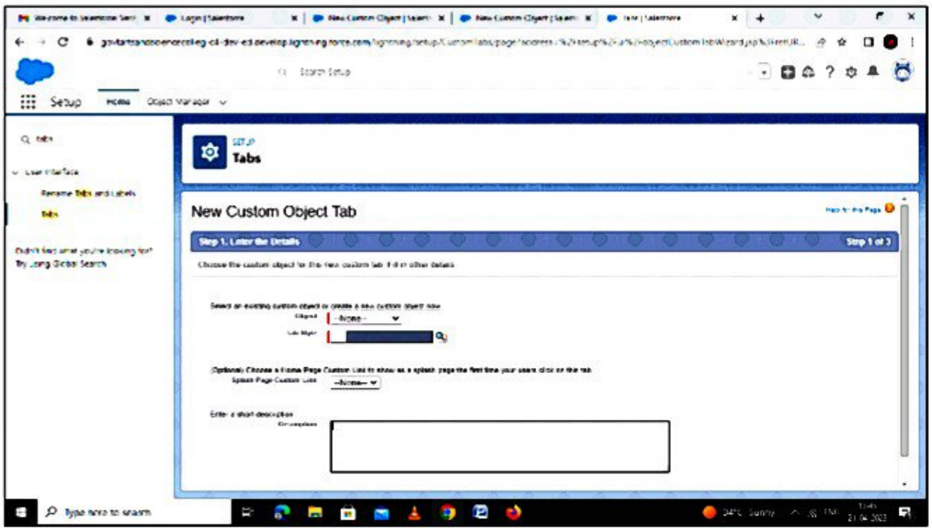
4.now the tabs section opens ,add this tab to the travel app.

create travel approval object

1.navigate back to object manger

2.click create then select custom object.

4.allow reports,search and launch a new tab to the travel app.



MILESTONE-4:

web tabs

custom object tabs

standard object tabs

visual tabs:

ACTIVITY -1:

now create a custom tab.click the home tab,enter the in quick find and select tabs .under custom object tabs ,click new.

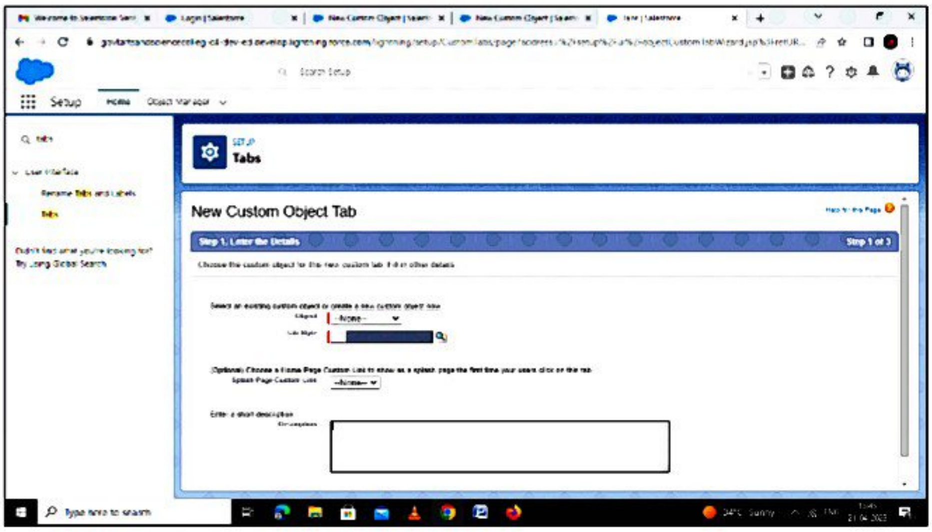
standard object tabs

visual tabs:

ACTIVITY -1:

now create a custom tab.click the home tab,enter the in quick find and select

tabs .under custom object tabs ,click new.



1.for the project select event

2.for tab style ,select any icon

3.leave all defults as is .click next ,and save

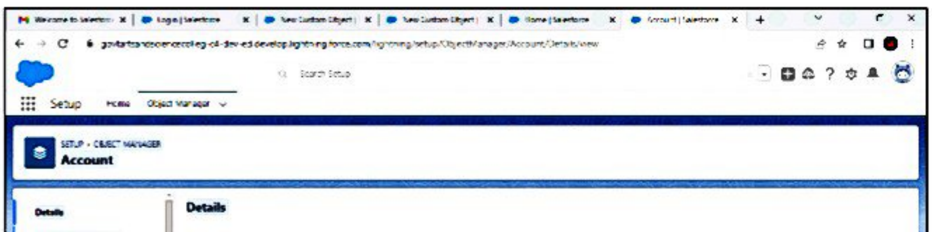
in the same way create other objects such as attendence ,speaker and vendor.

MILESTONE-4:

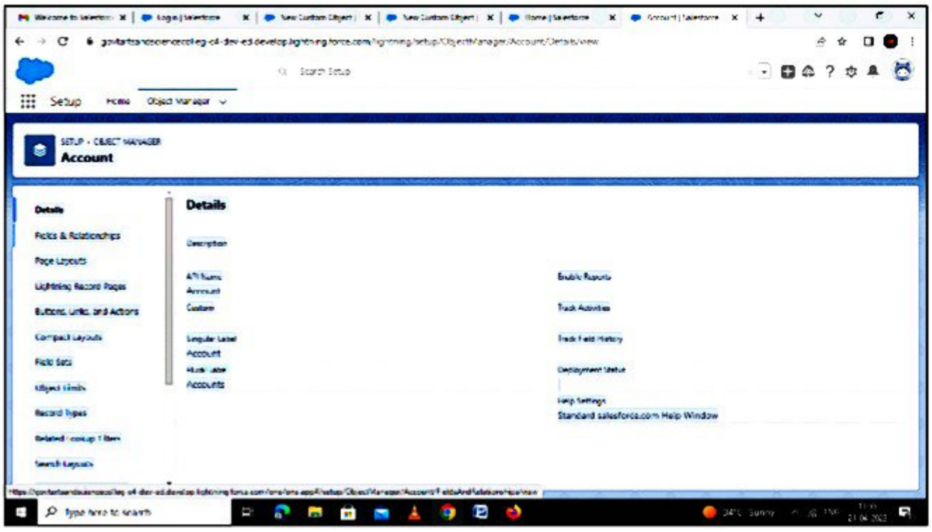
custom field :the custom fields which are added by the developer the bussiness

requirement of any organization .they many or may not be required.

ACTIVITY-1:



ACTIVITY-1:



1.click fields &relationship and click new.

2.for data type,select currency

3.enter the details.

a.forfield label ,enter amount

b.for legth,enter 16

c.for decimal places ,enter 2

d.select required

4.click next,next,then save &new.

ACTIVITY-2:

create the expense type field .

- select pick list as the data types
- select enter values,with each value separated by anew line.
- add these values
- select required.

1.click fields &relationship and click new.

2.for data type,select currency

3.enter the details.

a.forfield label ,enter amount

b.for legth,enter 16

c.for decimal places ,enter 2

d.select required

4.click next,next,then save &new.

ACTIVITY-2:

create the expense type field .

- select pick list as the data types
- select enter values,with each value separated by anew line.
- add these values
- select required.
- click next ,next,then save &new.

ACTIVITY-3:

creating the travel approval field.

- select master details relationship data type,click next.
- select travel approvel from the related to menu.
- click next four times, then click save.

ACTIVITY-3:

creating the travel approval field.

- select master details relationship data type,click next.
- select travel approvel from the related to menu.
- click next four times, then click save.

MILESTONE -5:

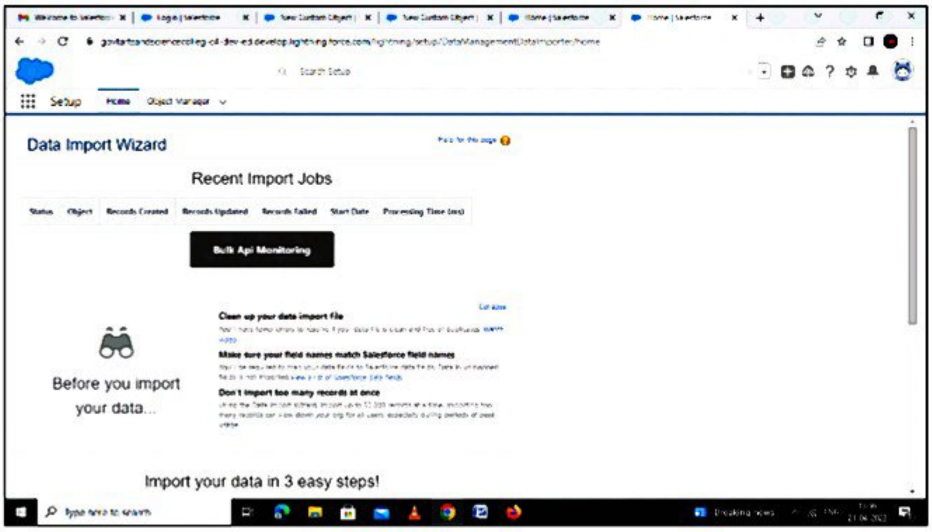
in the order to complete this milestone ,you need to download the reference file

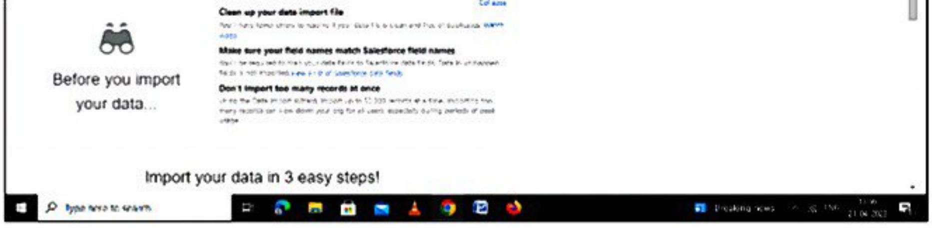
ACTIVITY-1:

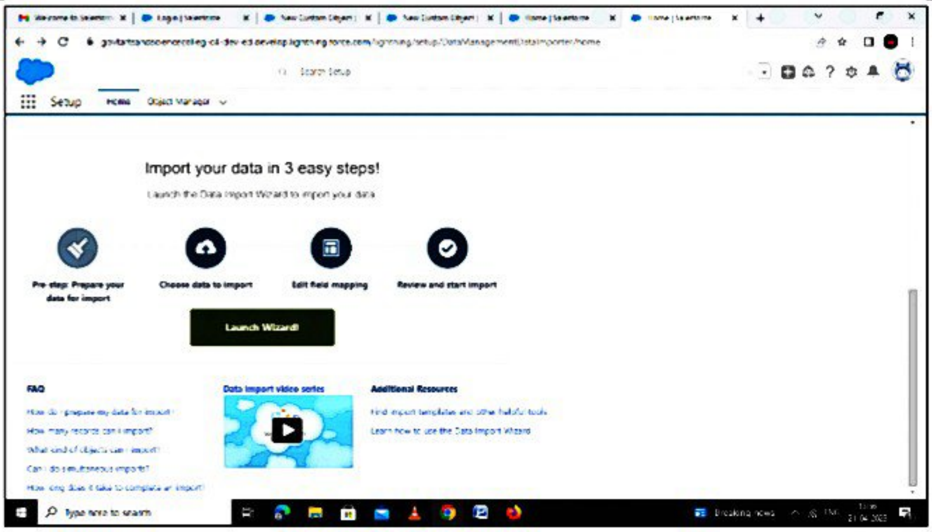
from the setup ,click the home tabs

1.in the quick find box,enter data import,and select data import wizard

2.click launch wizard!







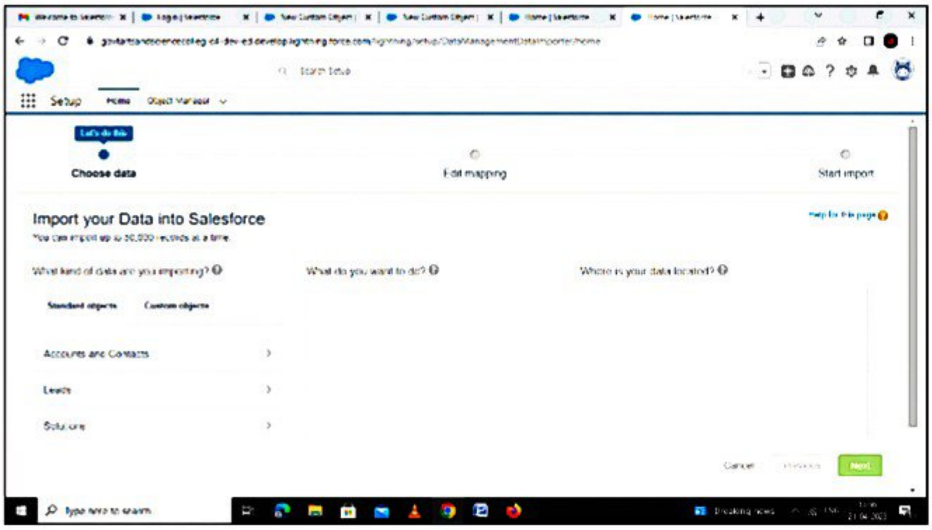
click the custom objectstabs and select the departments objects

3.next ,select add new records.

4.drag and the departments .csv files you download using zip file

3.next ,select add new records.

4.drag and the departments .csv files you download using zip file



5.since the fields names in the CSV file are the same as the field names in your object mapped click now.

6.the next screen gives you a summary of you data import. click start imports

7.click ok on the papup.

MILESTONE-6:

in the milestone we are going setup the user ,customizing the page layouts

ACTIVITY-1:

create user and setup approvals

6.the next screen gives you a summary of you data import. click start imports

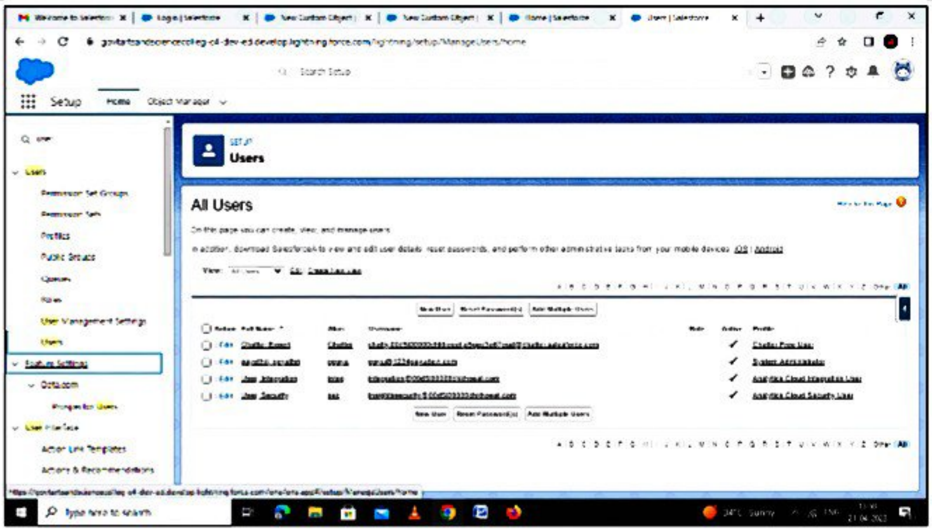
7.click ok on the papup.

MILESTONE-6:

in the milestone we are going setup the user ,customizing the page layouts

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 instructions

***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

4.For username field follow the instructions

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.

8.click edit.

9.scroll down to Approver settings.Set your manager as the user you have created recently.

10.Click save.

Milestone 7-Use customization

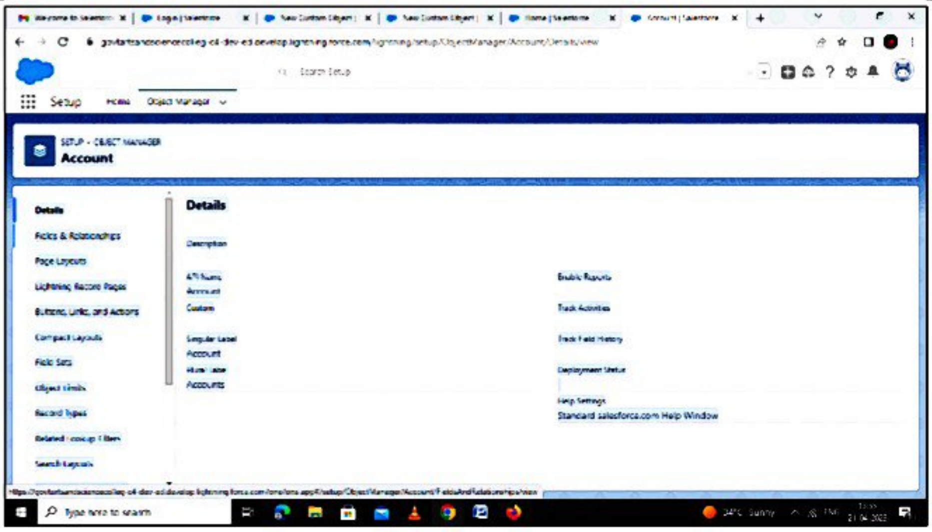
Customization refers to custom software development and coding to add robust features to your CRM platform.These features can be integrated with your business to have a scalable impact.

Activity-1:

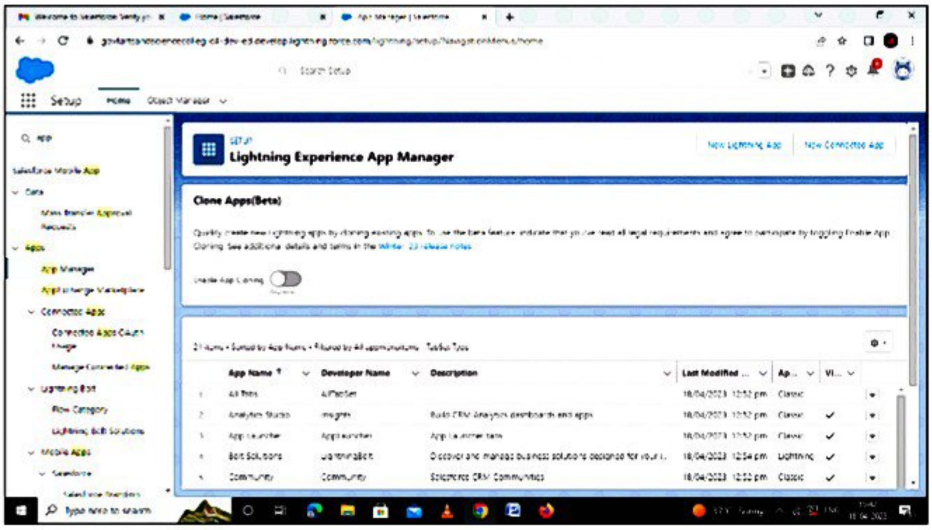
customize Travel Approval Object page layout

1.From the object manager,search for the travel approval object and clik

1.From the object manager,search for the travel approval object and clik



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 setting as 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

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

Milestone 8-Add Business Logic to travel App

From this milestone we are going to create validation rules,rollup summary fields, formula fields,workflows and approval process.

Activity-1:

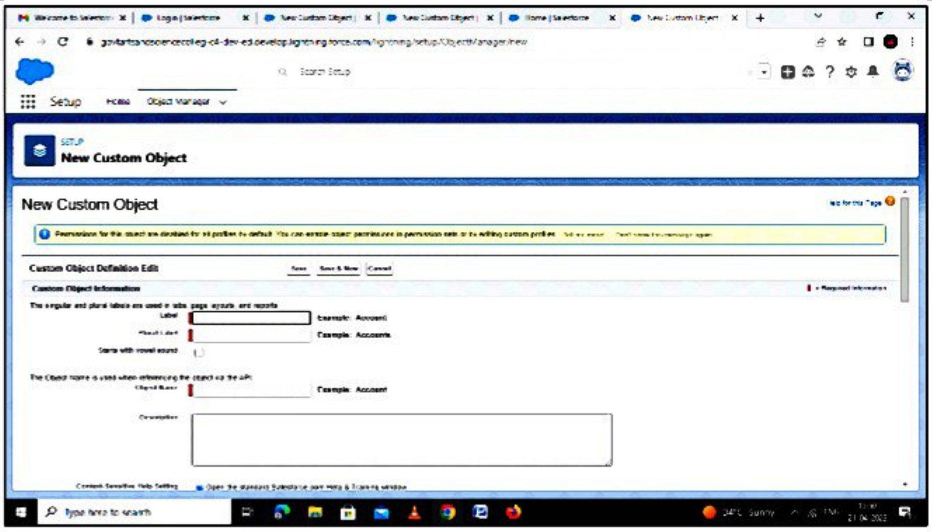
Create Validation Rule

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 errorlocation select field an dpick trip and as their location for error.



Activity-2:

Create Rollup Summary fields

3.Select the roll-up summary data type.

4.Click next.

5.Enter the following values for the field details.

*Field Lable:Total expenses

*Field Name:Total_Expenses

6.Click next.

7.Configure the roll-up calculation.

*summarized object:expense items

*roll-up type:SUM

*Field to aggregate:Amount

*Filter crteria: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

4.click new.

2.Click the home tab to navigate back to the main setup page.

3.Click custom code|static resources

4.click new.

5.Enter the following values for your static resources

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 Lable:Status indicator

*FieldName:Status_indicator

*Formula Return type:text

12.Click next.

13.Copy and paste the following formula into the formula editor.

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.

with this access level,users can do everything views&editor can do, plus they can also control other user's access levels to this folder.Also ,user with manager access level can also delete the report.

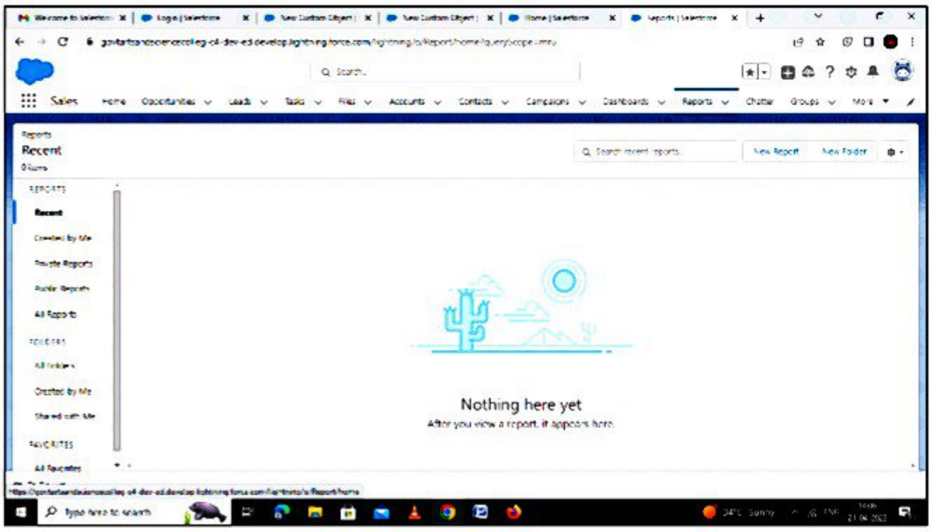
From this milestone we are to import the data and create report and dashboards data visulization inthe application.

Activity

Add Report

To create a report :

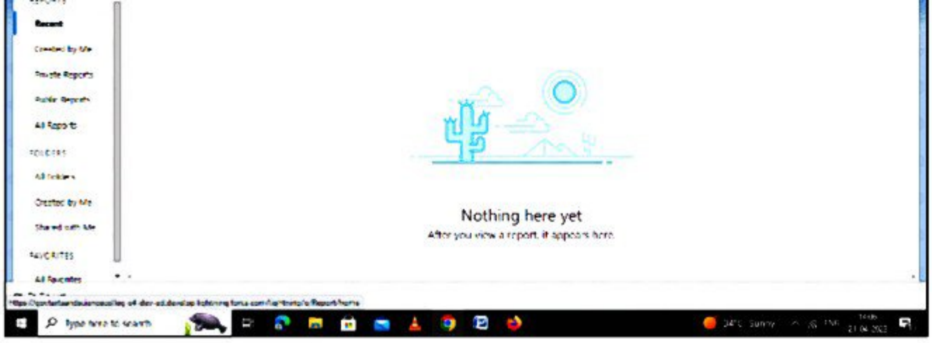
Go to the app,click on the reports tab



click new report

Select report type from catagory or from report type panel or from search panel,click on start report.

Customize your report ,then save or run it.



click new report

Select report type from catagory or from report type panel or from search panel,click on start report.

Customize your report ,then save or run it.

Milestone 11-Dashboards:

Dashboards let **you curate data from report using charts,tables and metrics.If** your colleagues need more information. then they're able to view dashboards data supplying reports.

Activity:

Create travel Approval dashboard

1.click on dashboards tab from the travel approval application,click on newdashboards

2.Give your dashboards a name and click on+component,select the reportwhich you created.

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