NAAN MUDHALVAN

PROJECT REPORT

on

[SALESFORCE]

Employee-travel approval application for corporates

Team NM Id- NM2023TMID01034

TEAM LEADER – NURSELIN ASHIK C

NM ID - 170177D81C868AE80A4425AF1D4E0ED5

TEAM MEMBER1 – ASHISH T N

NM ID - 7A44DBFEC56FB9E9F4643222574BD928

TEAM MEMBER 2 – JEFHRIN SPAHAN A M

NM ID - FCBADEEFFD701F0B3D742C9276A15300

TEAM MEMBER3 – RAJU R

NM ID - 8EA0E9D689382E180C5437BFC57822E9

Developer (Short Term)

1.Introduction:

"Employee-travel approval application for corporates" aims to provide real-time knowledge for all the students who have basic knowledge of salesforce and are looking for a real-time project.

Purpose:

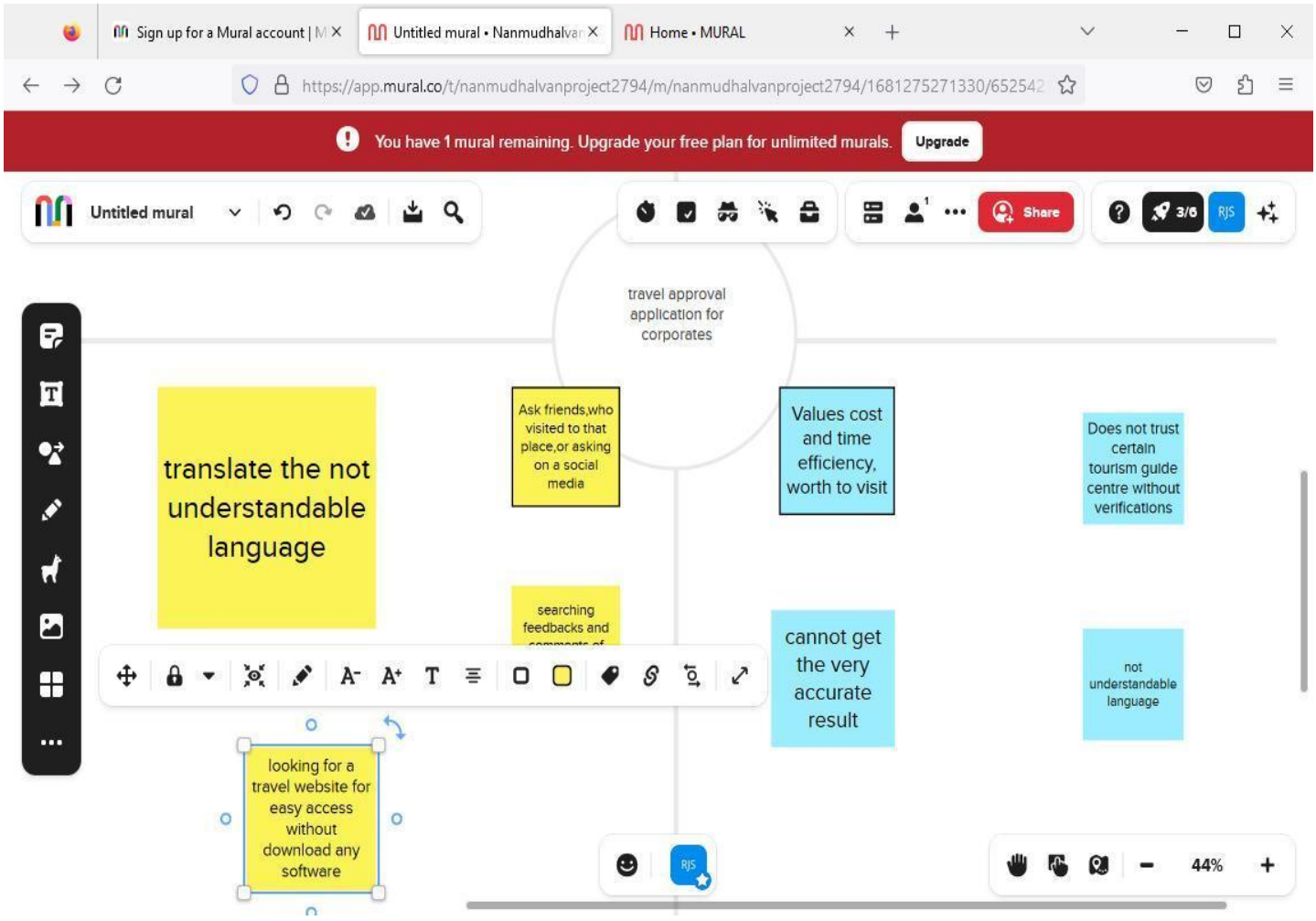
Pre trip approval is to control undesirable travel buying behaviours of employee cost

This application allows us to arrange and monitor travel plans and expense reports for our organization using Salesforce Platform

2.Problem Definition & Design Thinking

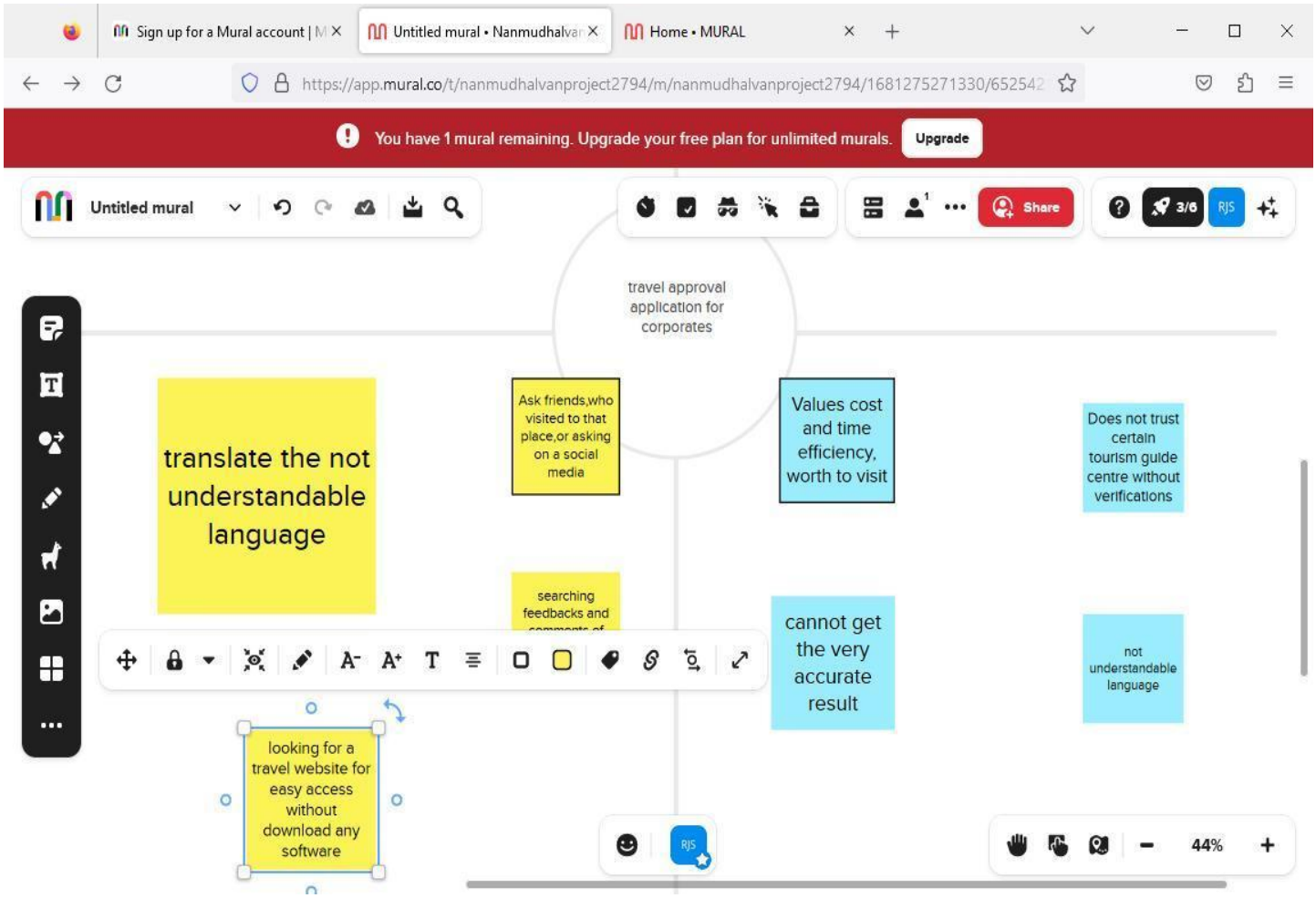
Empathy Map:

Understanding the needs and pain points of users, including educators, HR professionals, and administrators, to create a user-focused system.



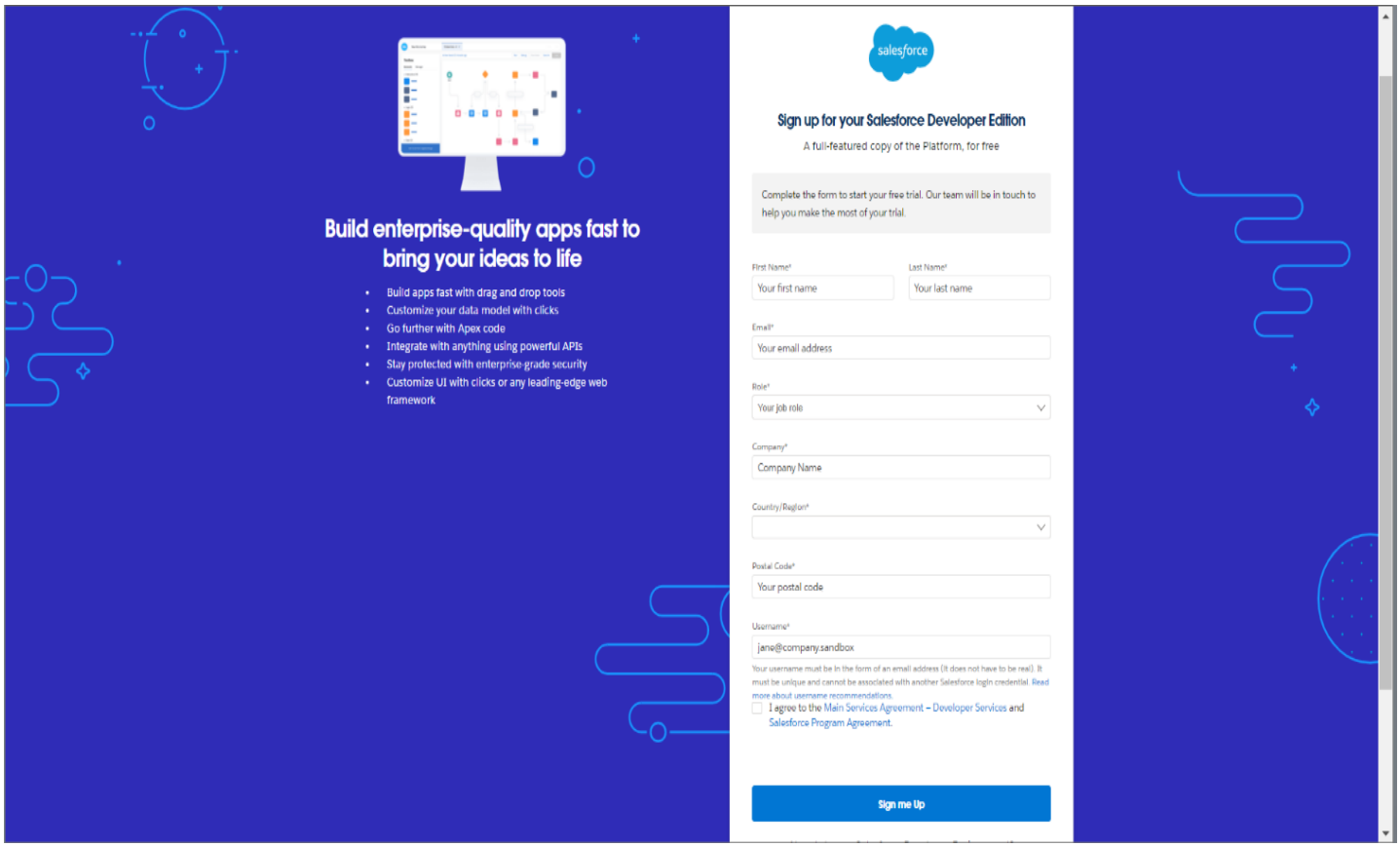
Ideation & Brainstorming Map

Generating creative solutions to address the identified challenges, using brainstorming and collaboration.



Milestone-1 [Creation of developer account]

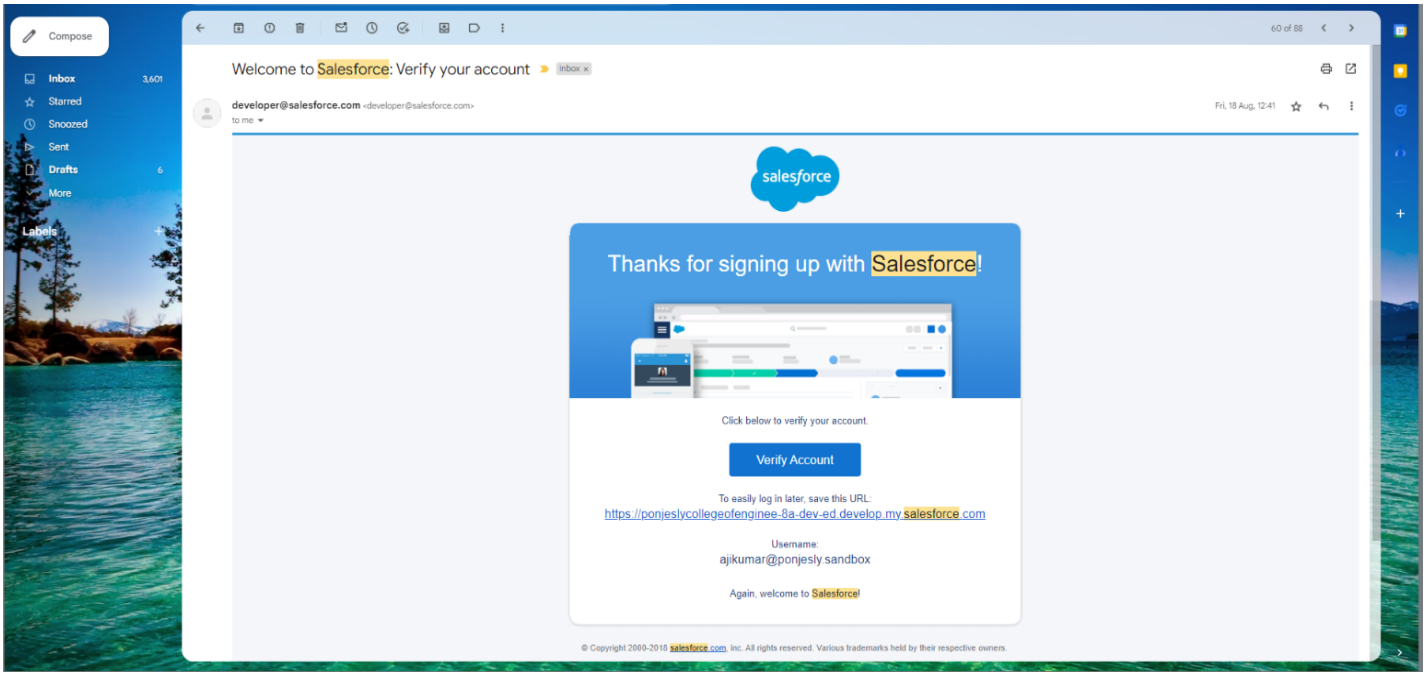
1. Go to developers.salesforce.com/signup
2. Click on sign up.
3. On the sign up form, enter the following details:
    a) First name:
    b) Last name:
    c) Email:
    d) Role:
    e) Company:
    f) County:
    g) Postal Code:
    h) Username:



Account Activation

Go to the inbox of the email that you used while signing up.

Click on the verify account to activate your account.

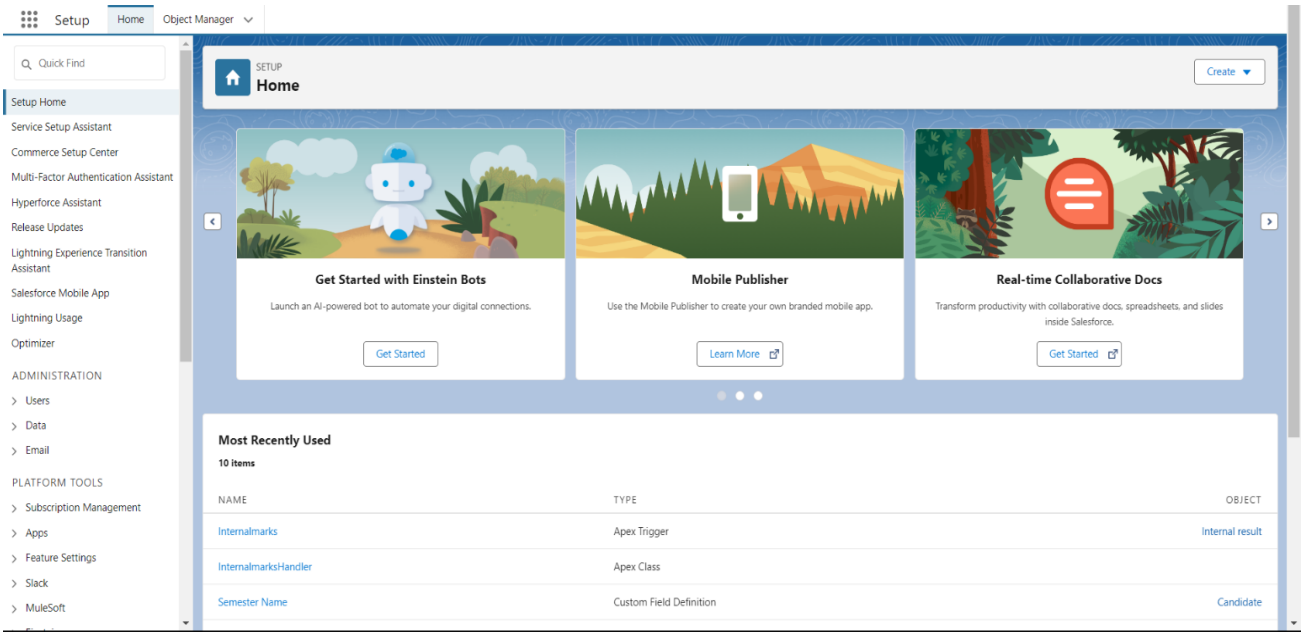


Login to Your Salesforce Account

1.Go to salesforce.com and click on login.

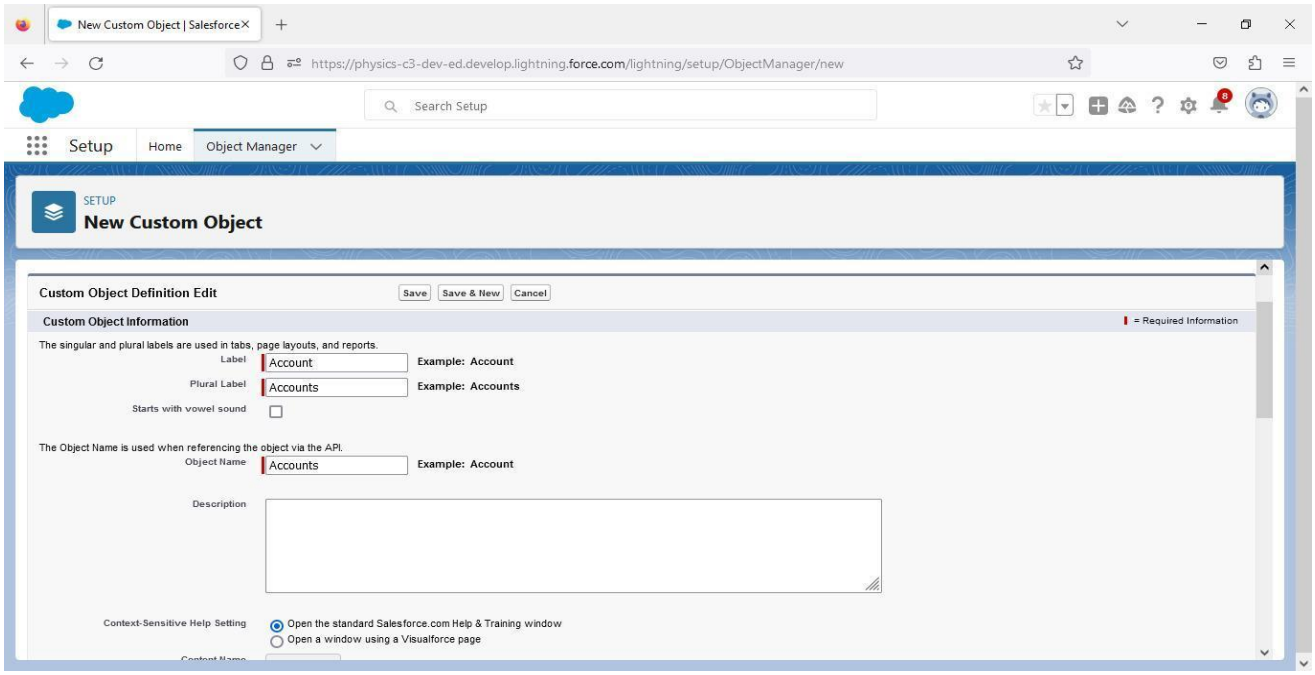
2.Enter the username and password that you just created.

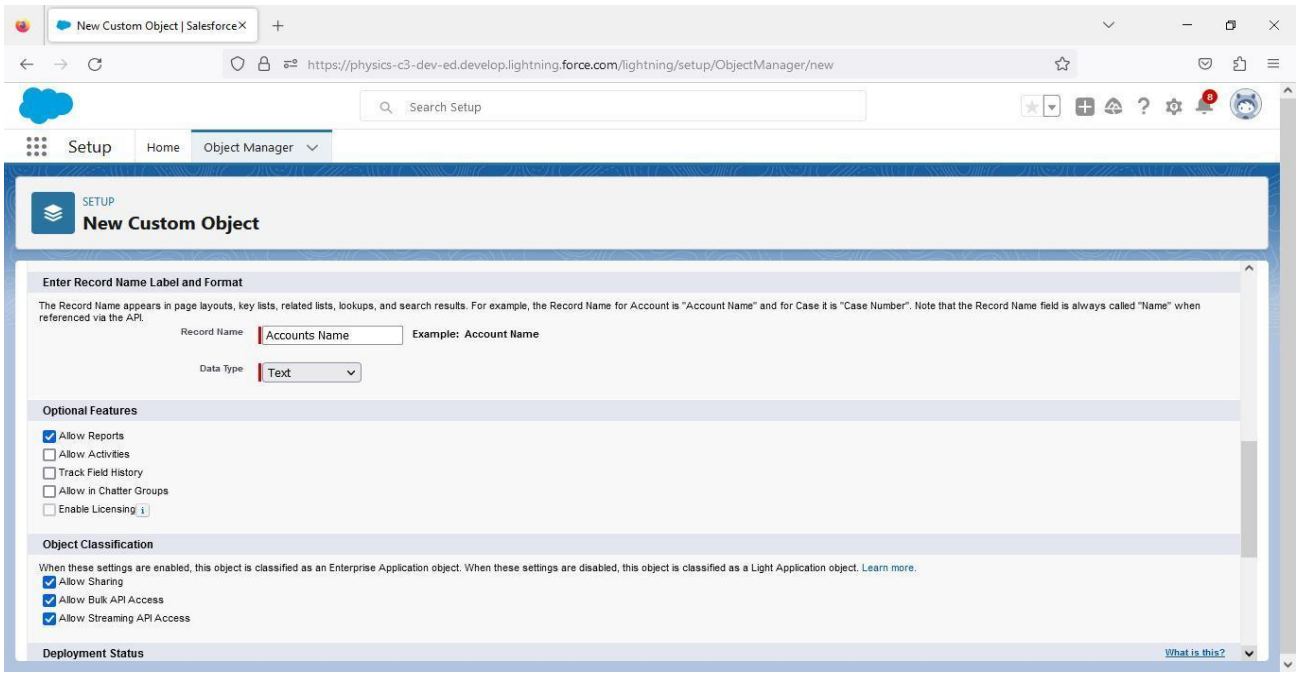
3.After login this is the home page which you will see.

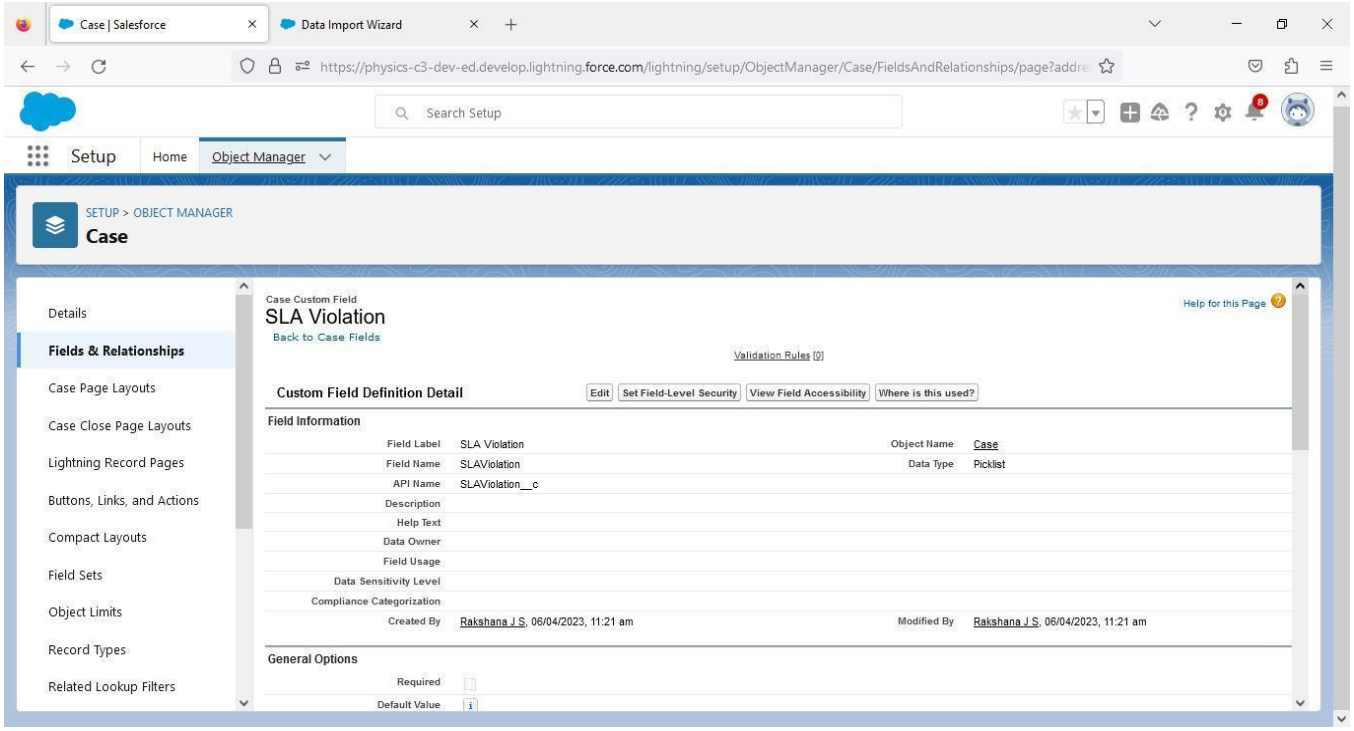


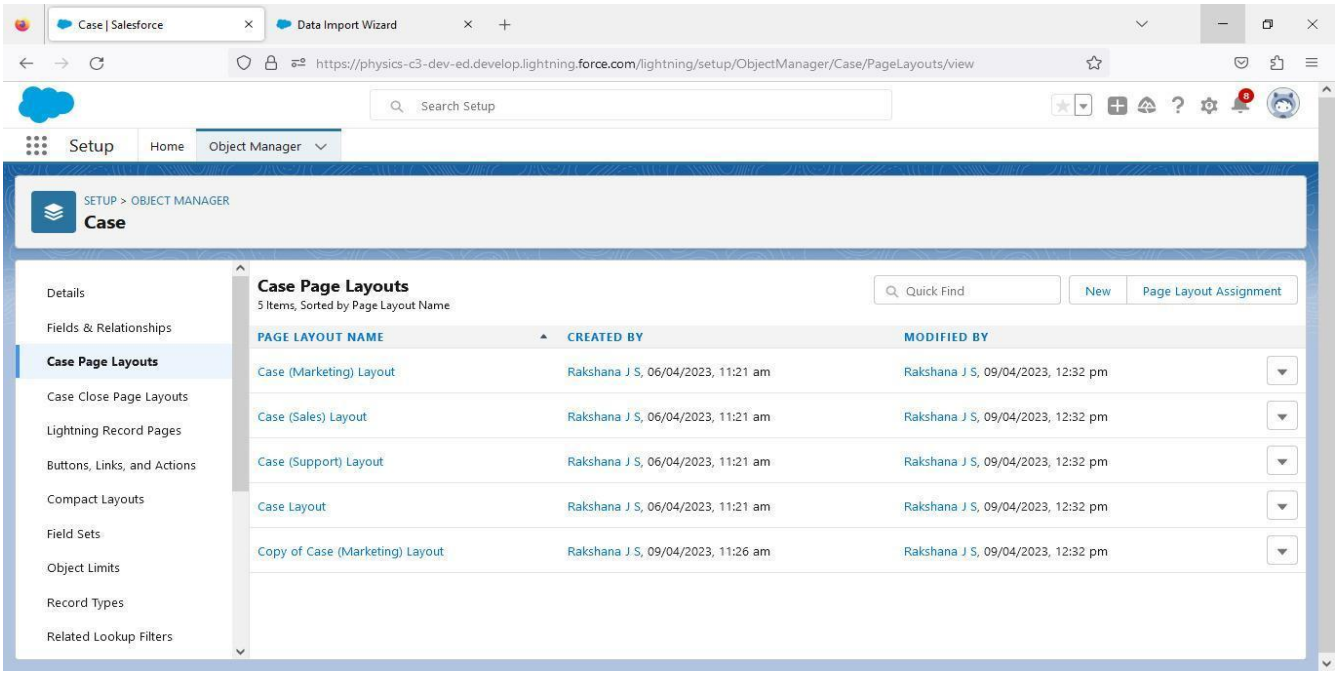
Milestone-2[Object creation]

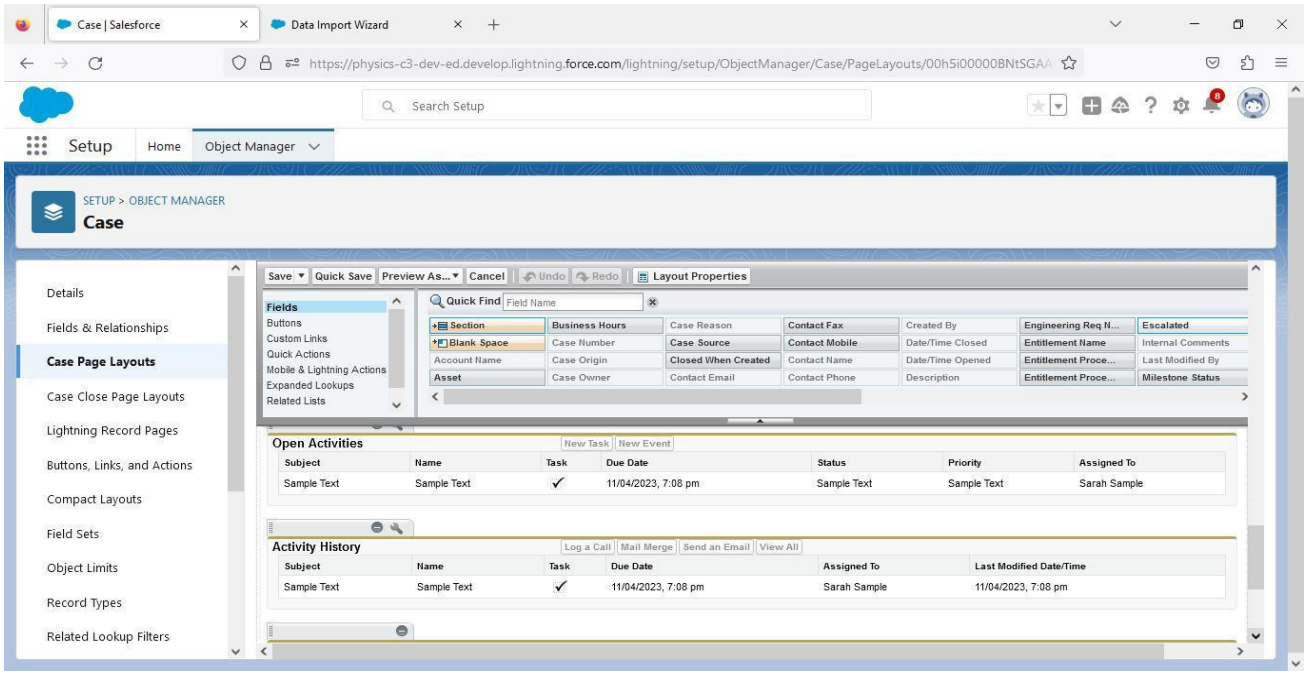
Creating Custom Object:






Case | Salesforce
Data Import Wizard
https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/page?addre
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Case
Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Case Custom Field
SLA Violation
Back to Case Fields
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label SLA Violation
Object Name Case
Field Name SLAViolation
Data Type Picklist
API Name SLAViolation__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By Rakshana J S, 06/04/2023, 11:21 am
Modified By Rakshana J S, 06/04/2023, 11:21 am
General Options
Required
Default Value


Case | Salesforce
Data Import Wizard
https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/PageLayouts/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Case
Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Case Page Layouts
5 Items, Sorted by Page Layout Name
Quick Find
New
Page Layout Assignment
PAGE LAYOUT NAME
CREATED BY
MODIFIED BY
Case (Marketing) Layout
Rakshana J S, 06/04/2023, 11:21 am
Rakshana J S, 09/04/2023, 12:32 pm
Case (Sales) Layout
Rakshana J S, 06/04/2023, 11:21 am
Rakshana J S, 09/04/2023, 12:32 pm
Case (Support) Layout
Rakshana J S, 06/04/2023, 11:21 am
Rakshana J S, 09/04/2023, 12:32 pm
Case Layout
Rakshana J S, 06/04/2023, 11:21 am
Rakshana J S, 09/04/2023, 12:32 pm
Copy of Case (Marketing) Layout
Rakshana J S, 09/04/2023, 11:26 am
Rakshana J S, 09/04/2023, 12:32 pm


Case | Salesforce
Data Import Wizard
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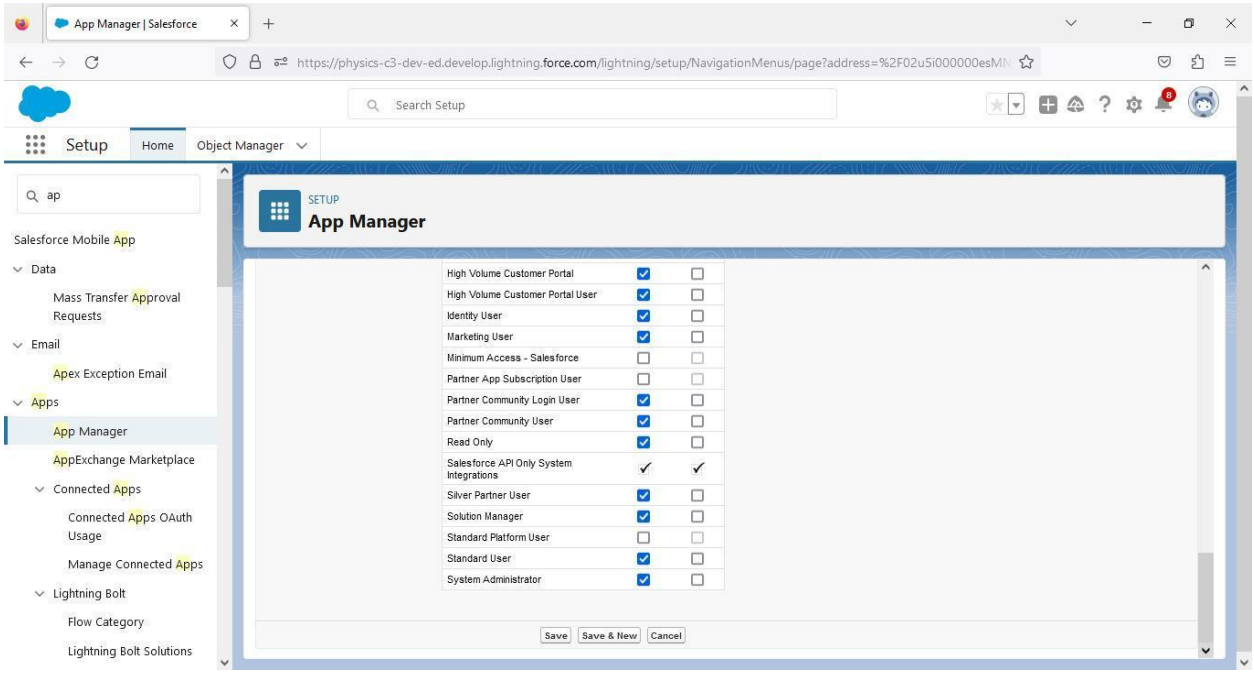
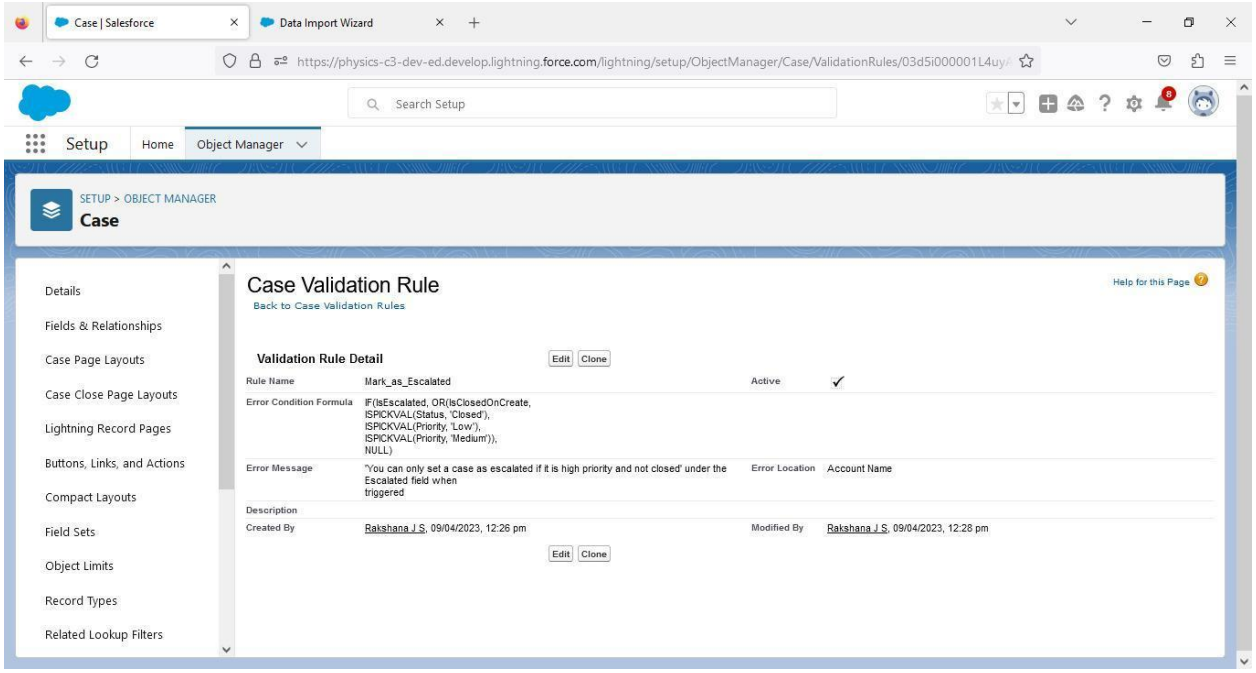
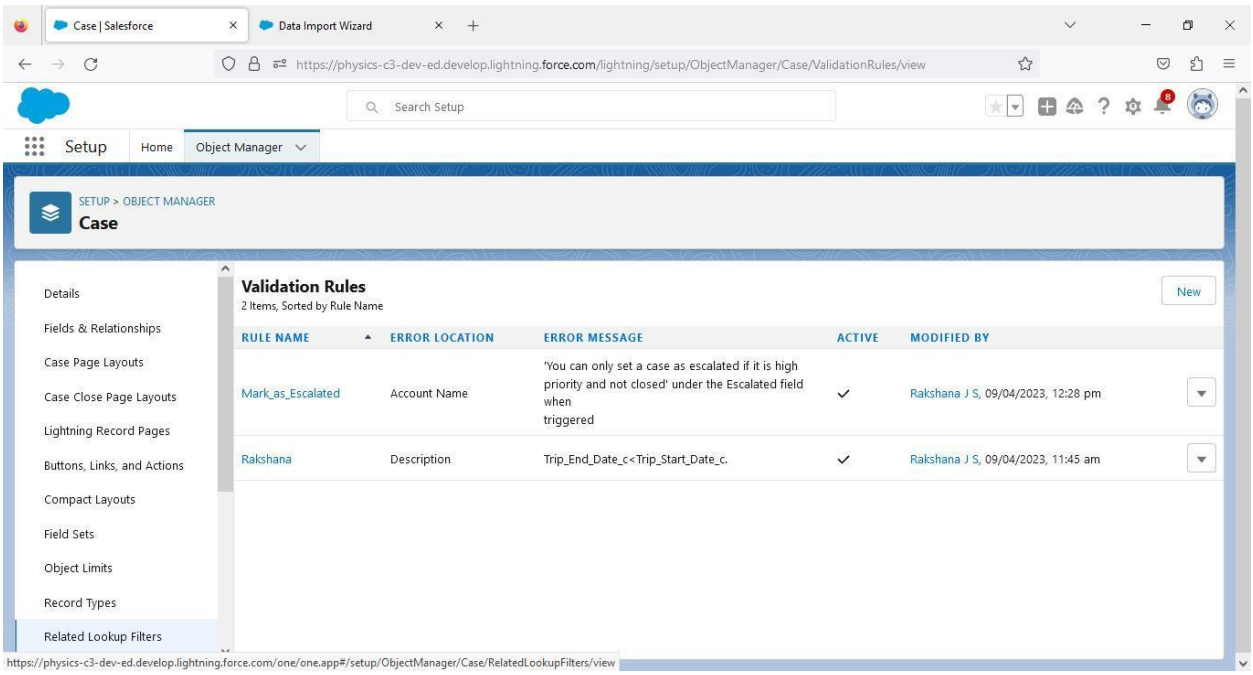
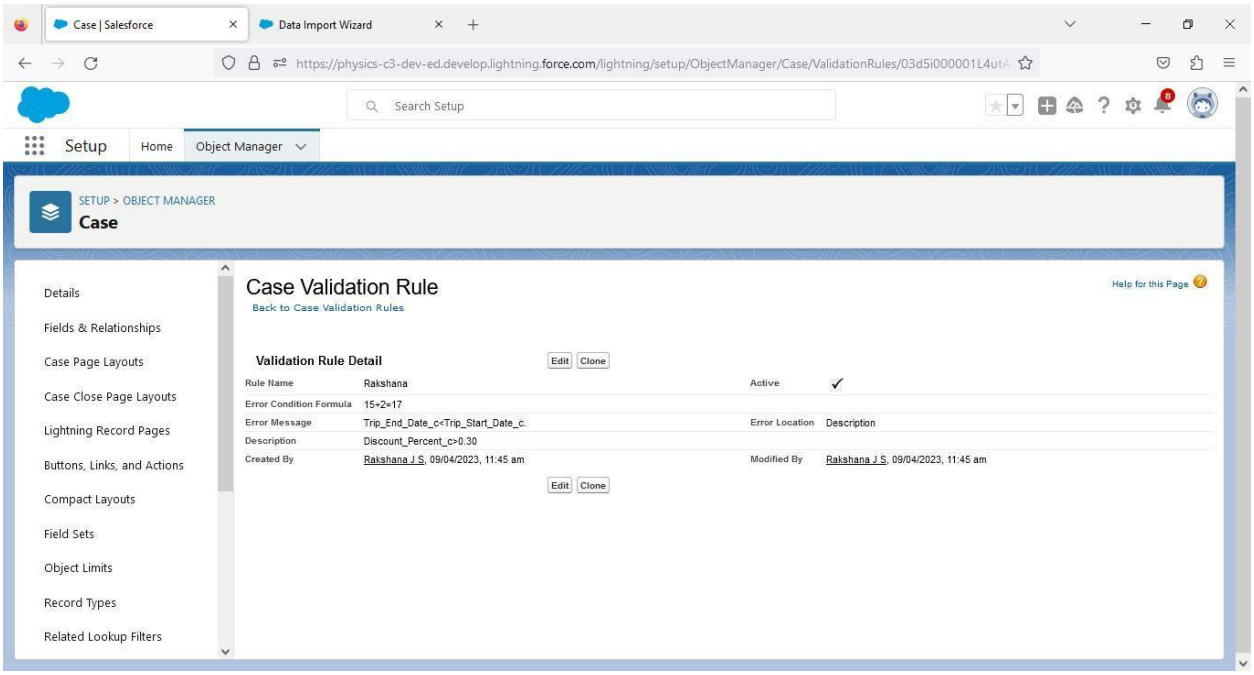
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Case
Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Custom Links
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Quick Find
Field Name
Section
Business Hours
Case Reason
Contact Fax
Created By
Engineering Req N...
Escalated
Blank Space
Case Number
Case Source
Contact Mobile
Date/Time Closed
Entitlement Name
Internal Comments
Account Name
Case Origin
Closed When Created
Contact Name
Date/Time Opened
Entitlement Proce...
Last Modified By
Asset
Case Owner
Contact Email
Contact Phone
Description
Entitlement Proce...
Milestone Status
Open Activities
New Task
New Event
Subject
Name
Task
Due Date
Status
Priority
Assigned To
Sample Text
Sample Text
11/04/2023, 7:08 pm
Sample Text
Sample Text
Sarah Sample
Activity History
Log a Call
Mail Merge
Send an Email
View All
Subject
Name
Task
Due Date
Assigned To
Last Modified Date/Time
Sample Text
Sample Text
11/04/2023, 7:08 pm
Sarah Sample
11/04/2023, 7:08 pm

Milestone-3[Creating App]






Case | Salesforce
Data Import Wizard
https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/ValidationRules/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Case
Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Validation Rules
2 Items, Sorted by Rule Name
New
RULE NAME
ERROR LOCATION
ERROR MESSAGE
ACTIVE
MODIFIED BY
Mark_as_Escalated
Account Name
'You can only set a case as escalated if it is high priority and not closed' under the Escalated field when triggered
Rakshana J S, 09/04/2023, 12:28 pm
Rakshana
Description
Trip_End_Date_c<Trip_Start_Date_c.
Rakshana J S, 09/04/2023, 11:45 am
https://physics-c3-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/Case/RelatedLookupFilters/view


Case | Salesforce
Data Import Wizard
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Search Setup
Setup
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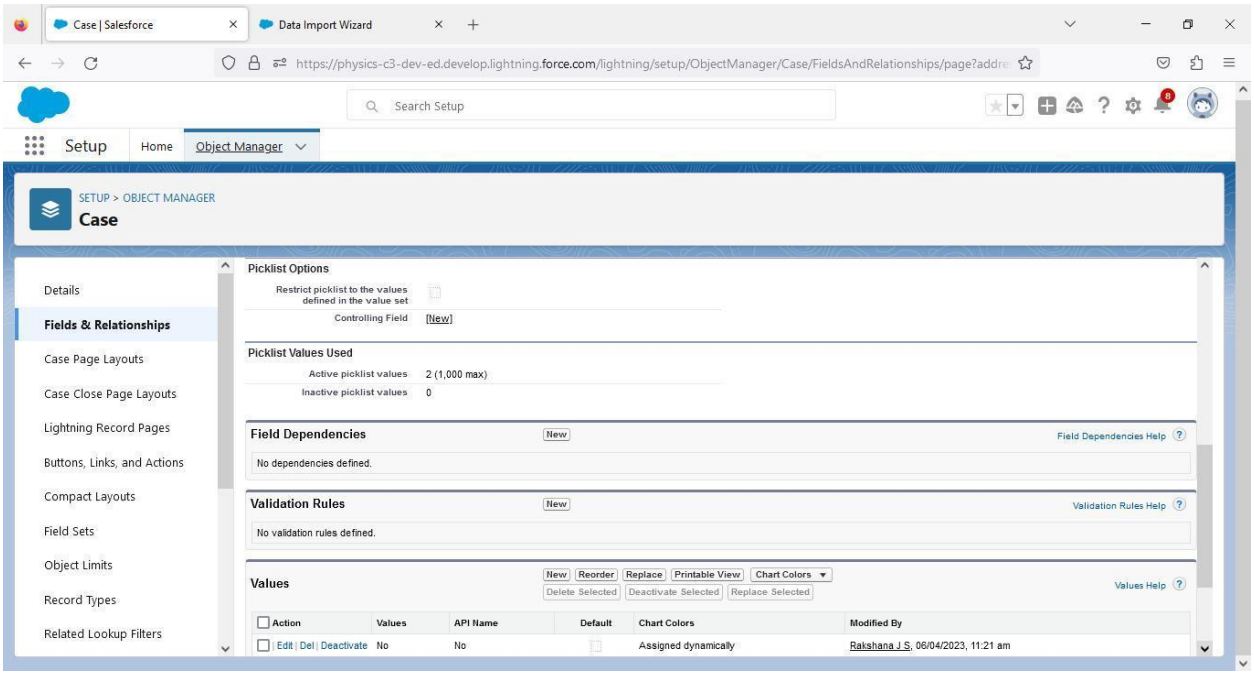
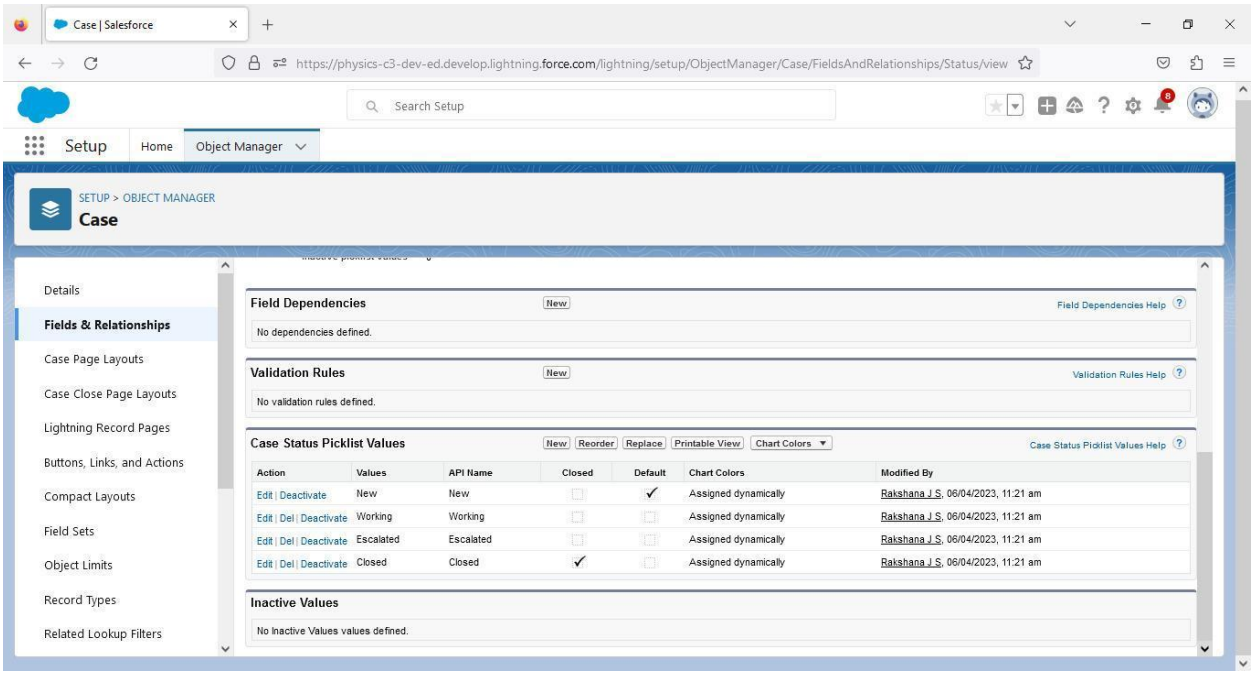
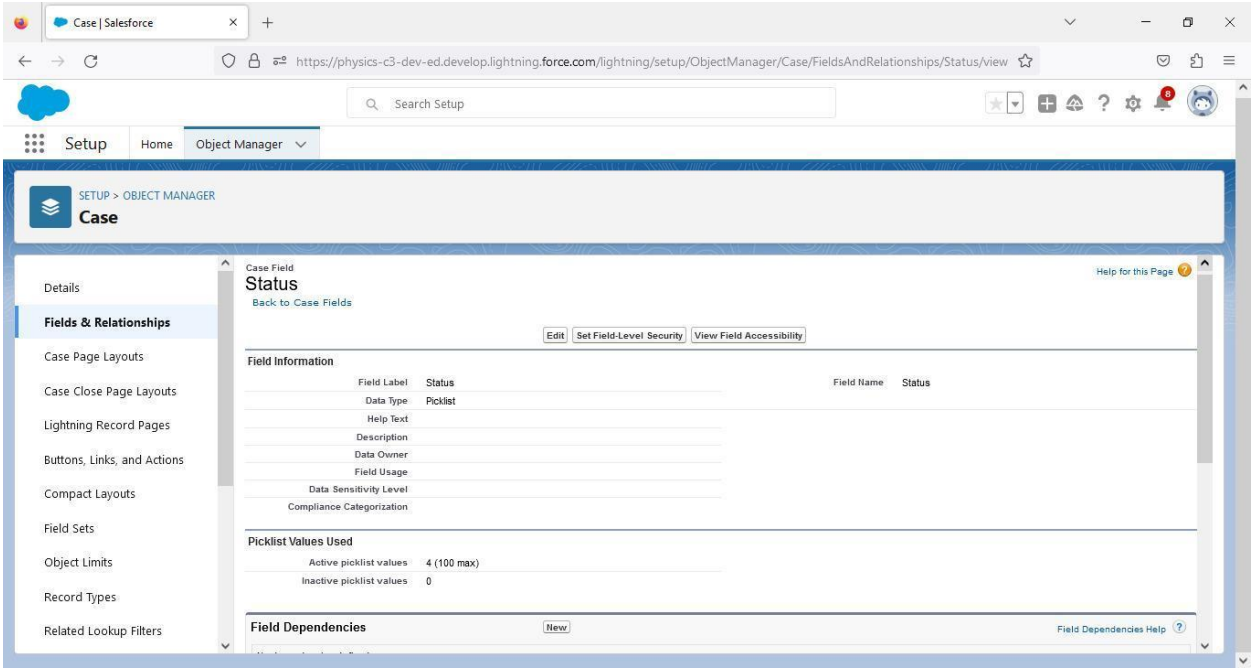
Object Manager
SETUP > OBJECT MANAGER
Case
Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Case Validation Rule
Back to Case Validation Rules
Help for this Page
Validation Rule Detail
Edit
Clone
Rule Name
Rakshana
Active
Error Condition Formula
15+2=17
Error Message
Trip_End_Date_c<Trip_Start_Date_c.
Error Location
Description
Description
Discount_Percent_c>0.30
Created By
Rakshana J S, 09/04/2023, 11:45 am
Modified By
Rakshana J S, 09/04/2023, 11:45 am
Edit
Clone

Milestone-4[Fields & relationship]






Case | Salesforce
https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Status/view
Search Setup
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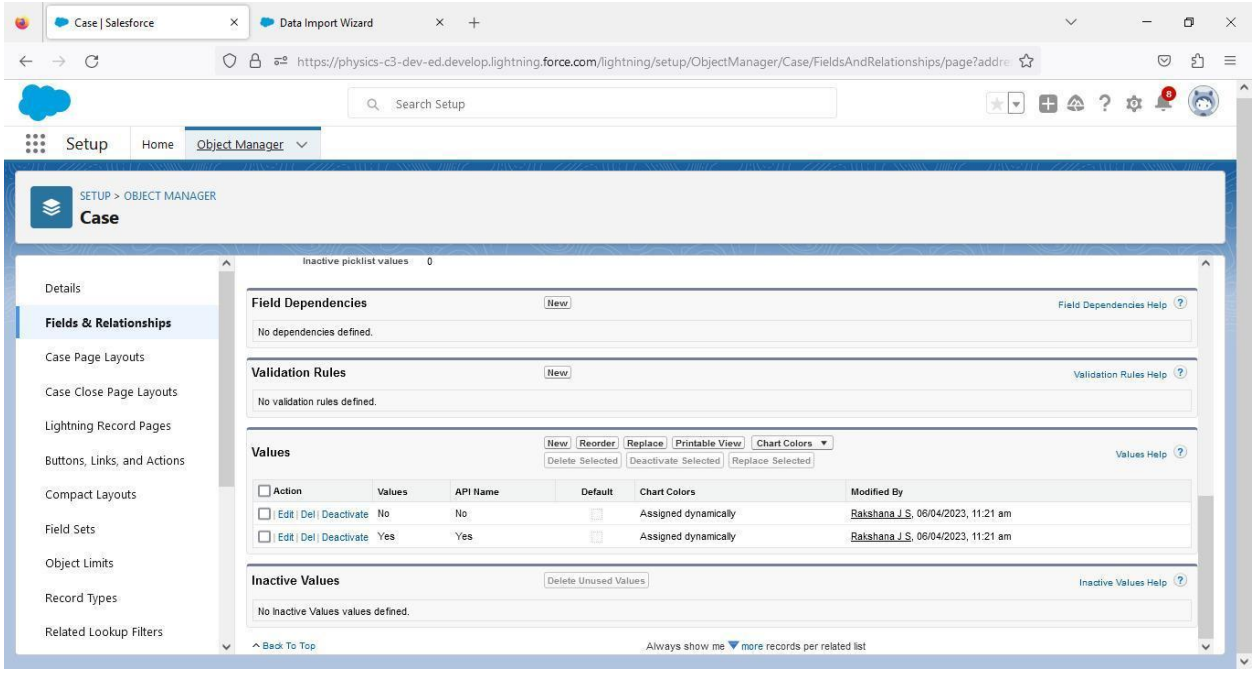
Home
Object Manager
SETUP > OBJECT MANAGER
Case
Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Case Field
Status
Back to Case Fields
Help for this Page
Edit
Set Field-Level Security
View Field Accessibility
Field Information
Field Label
Status
Field Name
Status
Data Type
Picklist
Help Text
Description
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Picklist Values Used
Active picklist values
4 (100 max)
Inactive picklist values
0
Field Dependencies
New
Field Dependencies Help


Case | Salesforce
Data Import Wizard
https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/page?addre
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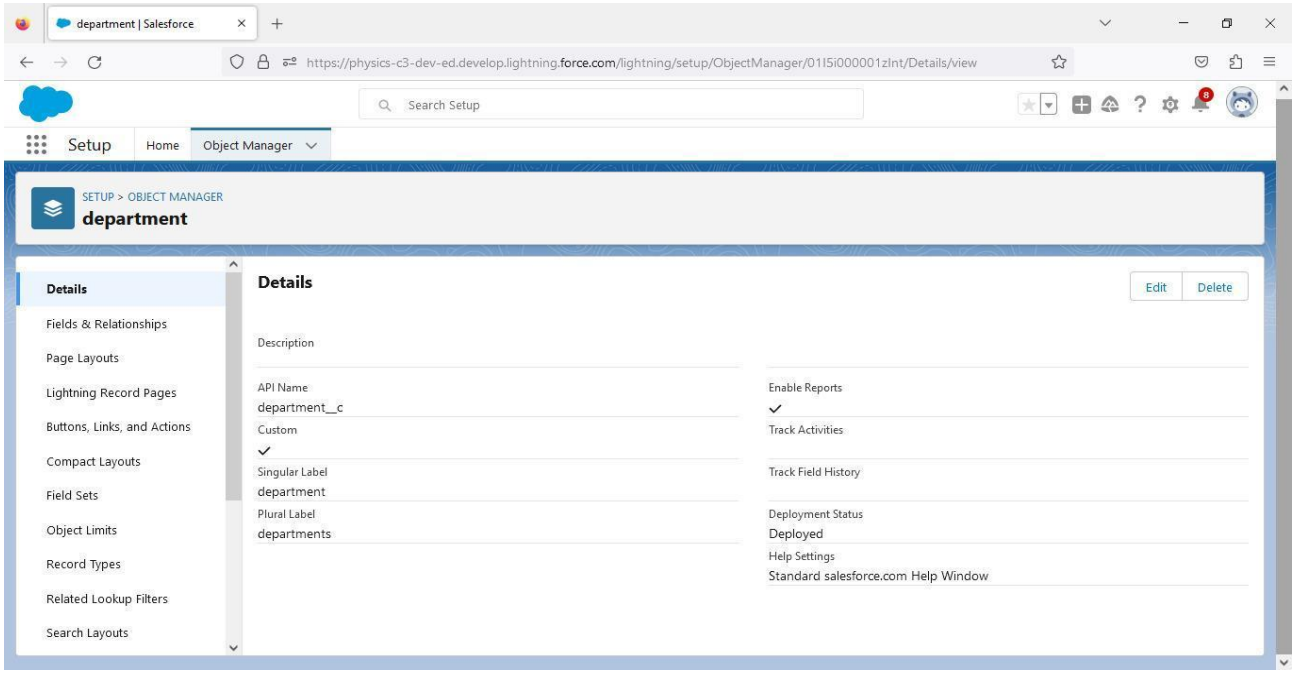
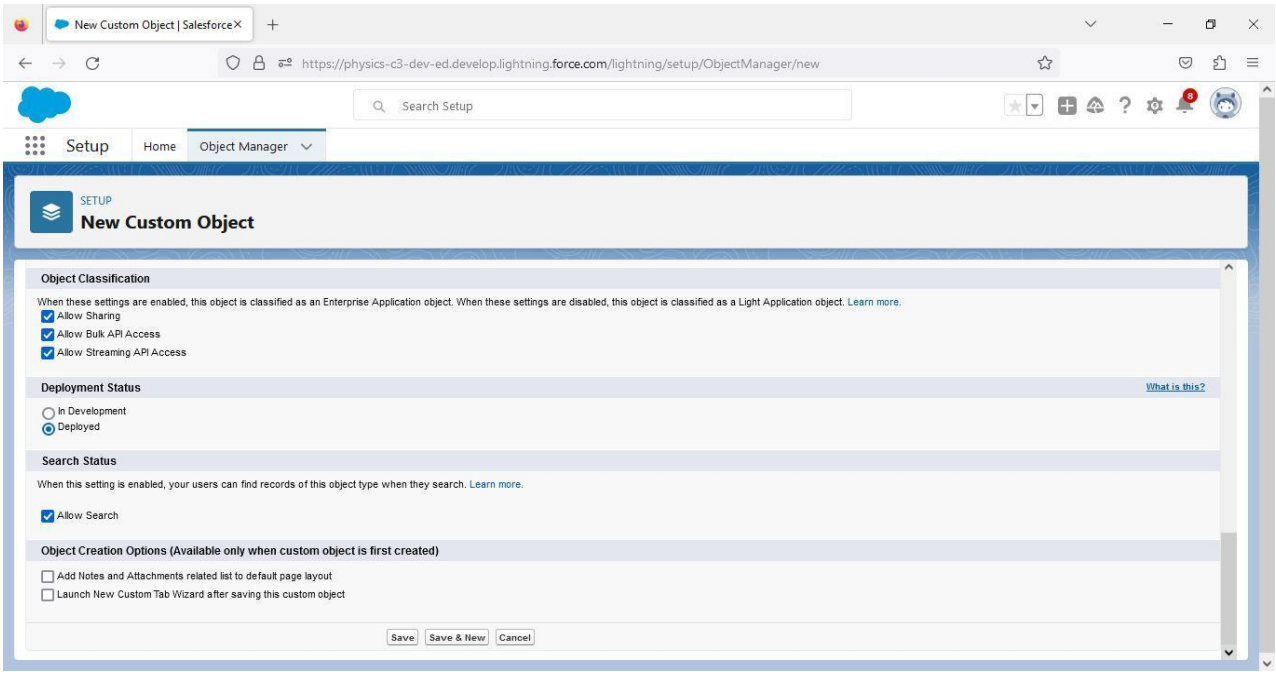
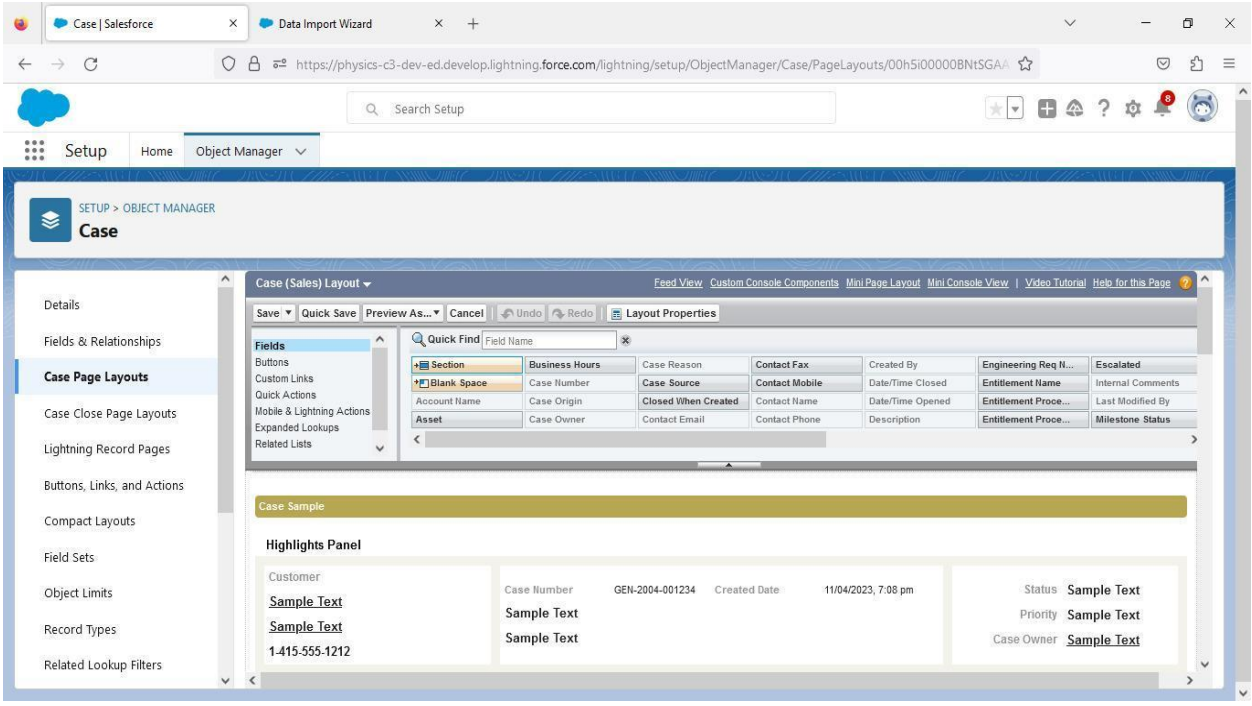
Object Manager
SETUP > OBJECT MANAGER
Case
Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Inactive picklist values
0
Field Dependencies
New
Field Dependencies Help
No dependencies defined.
Validation Rules
New
Validation Rules Help
No validation rules defined.
Values
New
Reorder
Replace
Printable View
Chart Colors
Delete Selected
Deactivate Selected
Replace Selected
Values Help
Action
Values
API Name
Default
Chart Colors
Modified By
Edit | Del | Deactivate
No
No
Assigned dynamically
Rakshana J S, 06/04/2023, 11:21 am
Edit | Del | Deactivate
Yes
Yes
Assigned dynamically
Rakshana J S, 06/04/2023, 11:21 am
Inactive Values
Delete Unused Values
Inactive Values Help
No Inactive Values values defined.
Back To Top
Always show me more records per related list

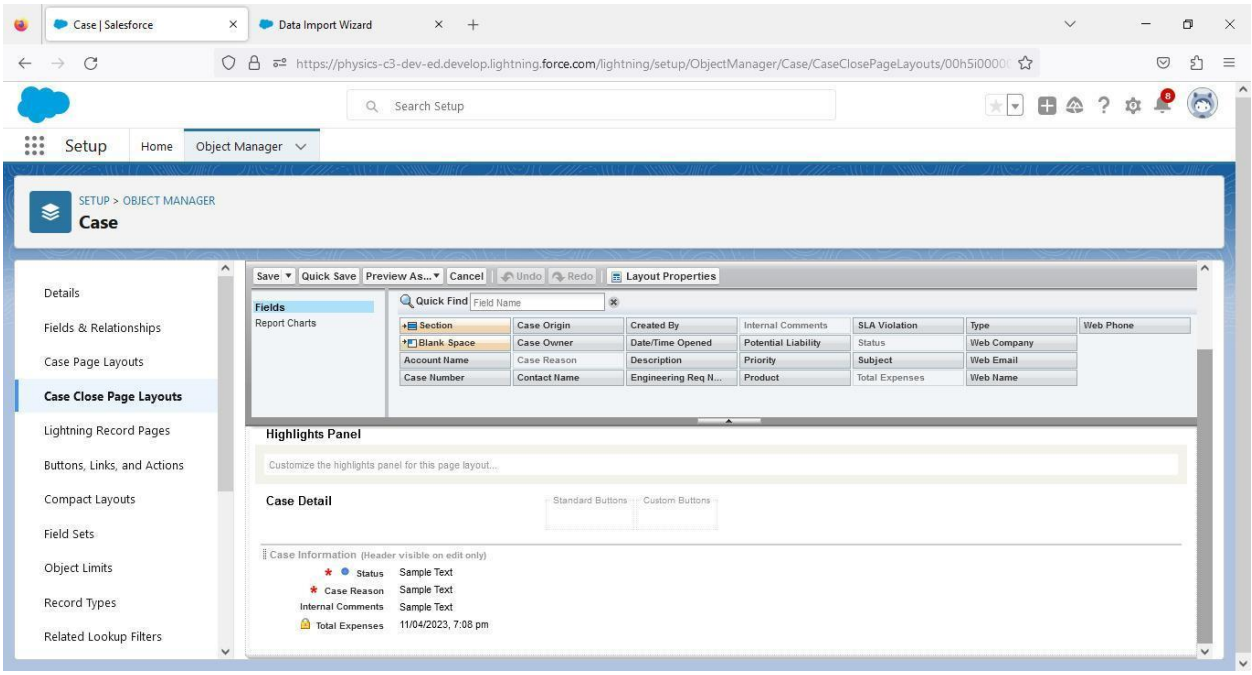
Milestone-5[Import department]

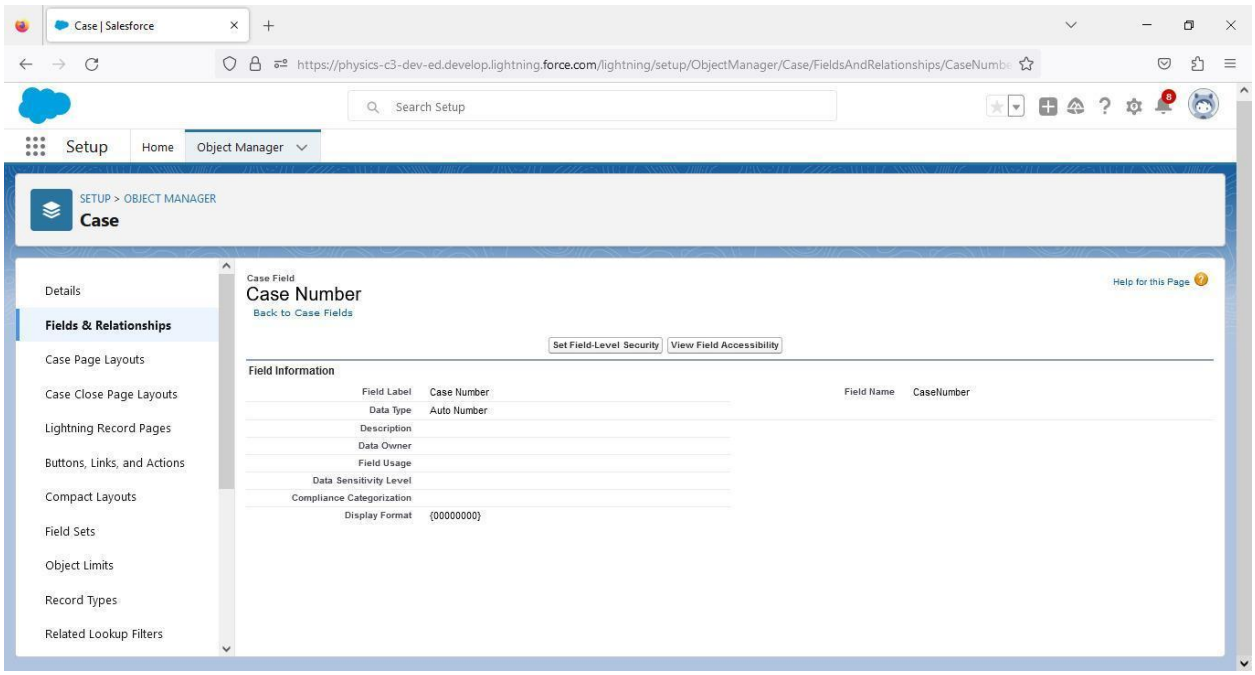


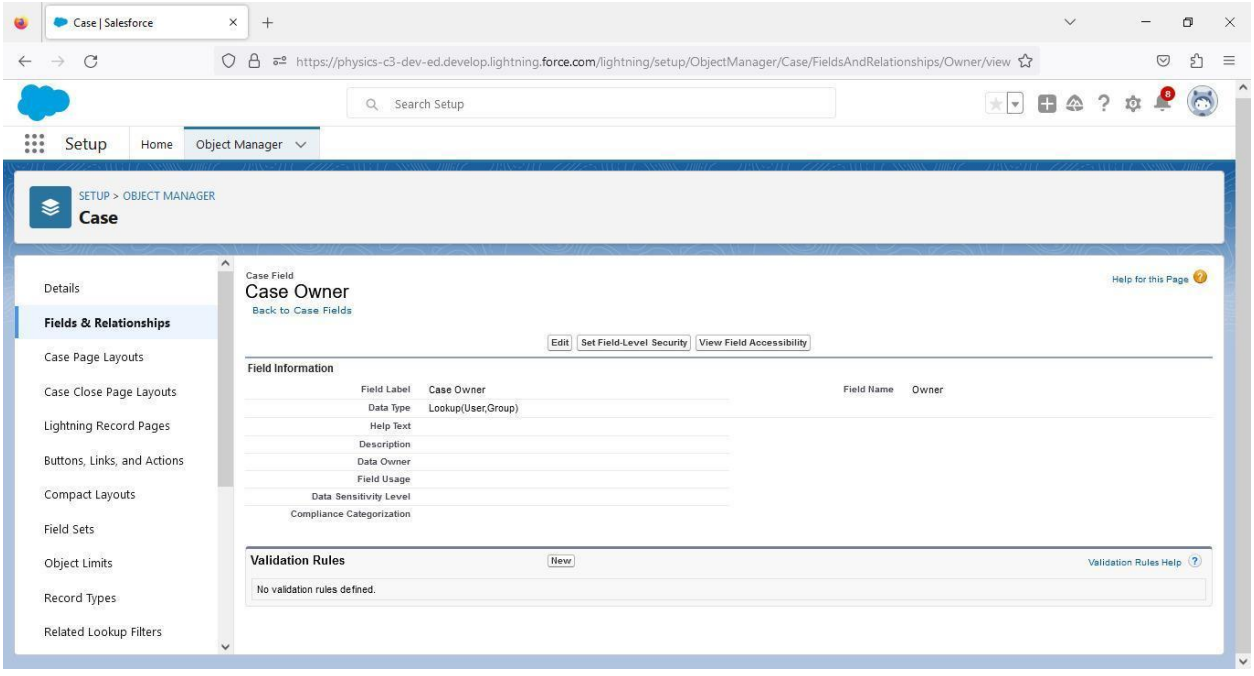


Milestone-6 [Page layout & Travel approval]

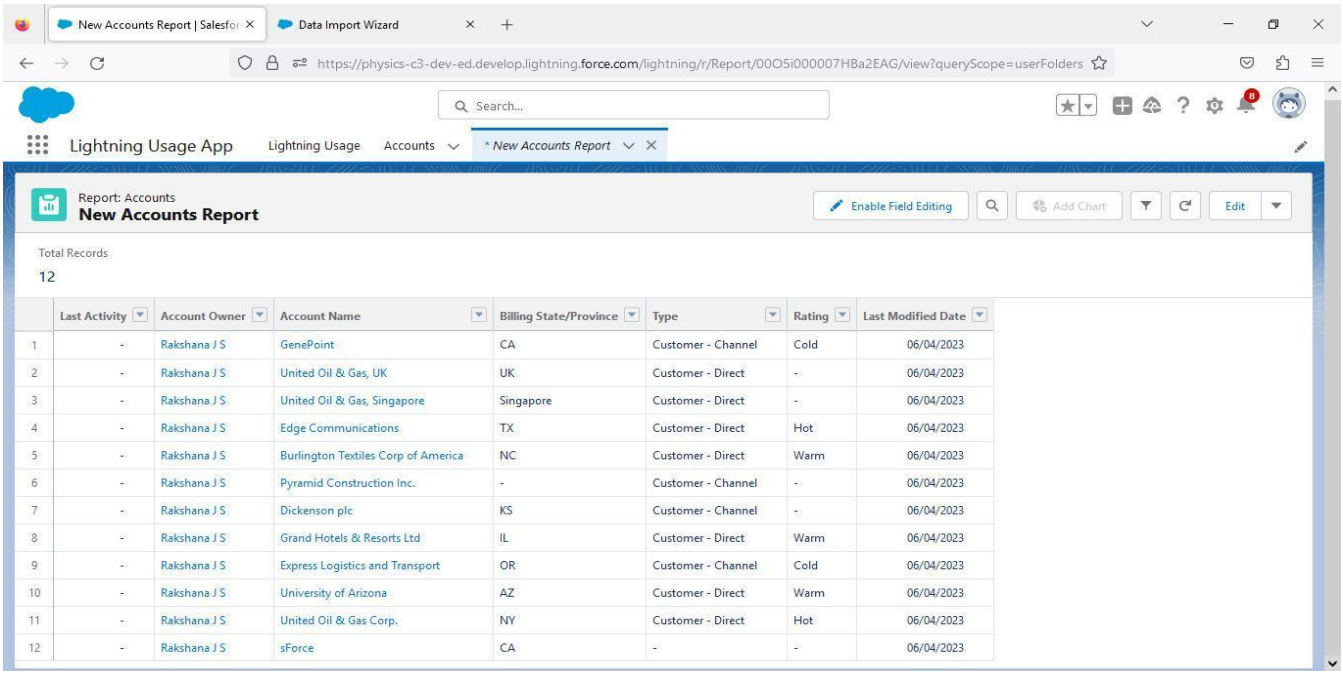




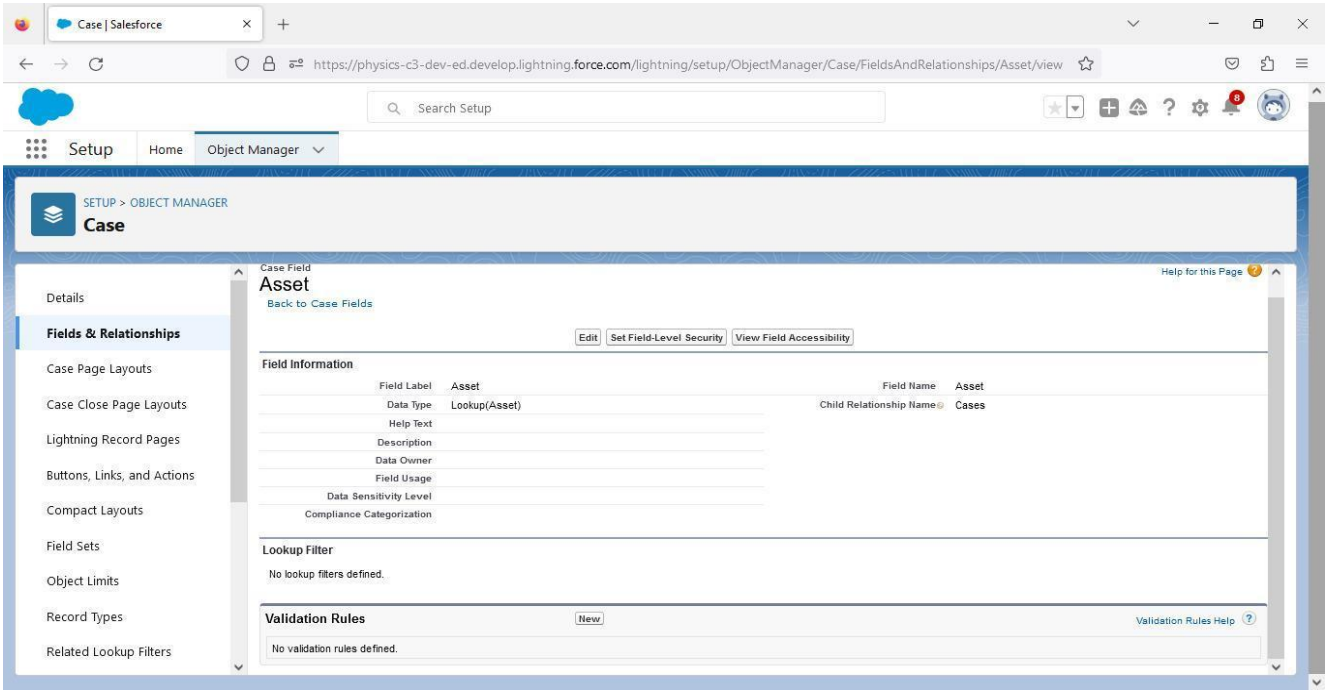

Case | Salesforce
https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/CaseNumber/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Case
Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Case Field
Case Number
Back to Case Fields
Help for this Page
Set Field-Level Security
View Field Accessibility
Field Information
Field Label Case Number
Field Name CaseNumber
Data Type Auto Number
Description
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Display Format {00000000}

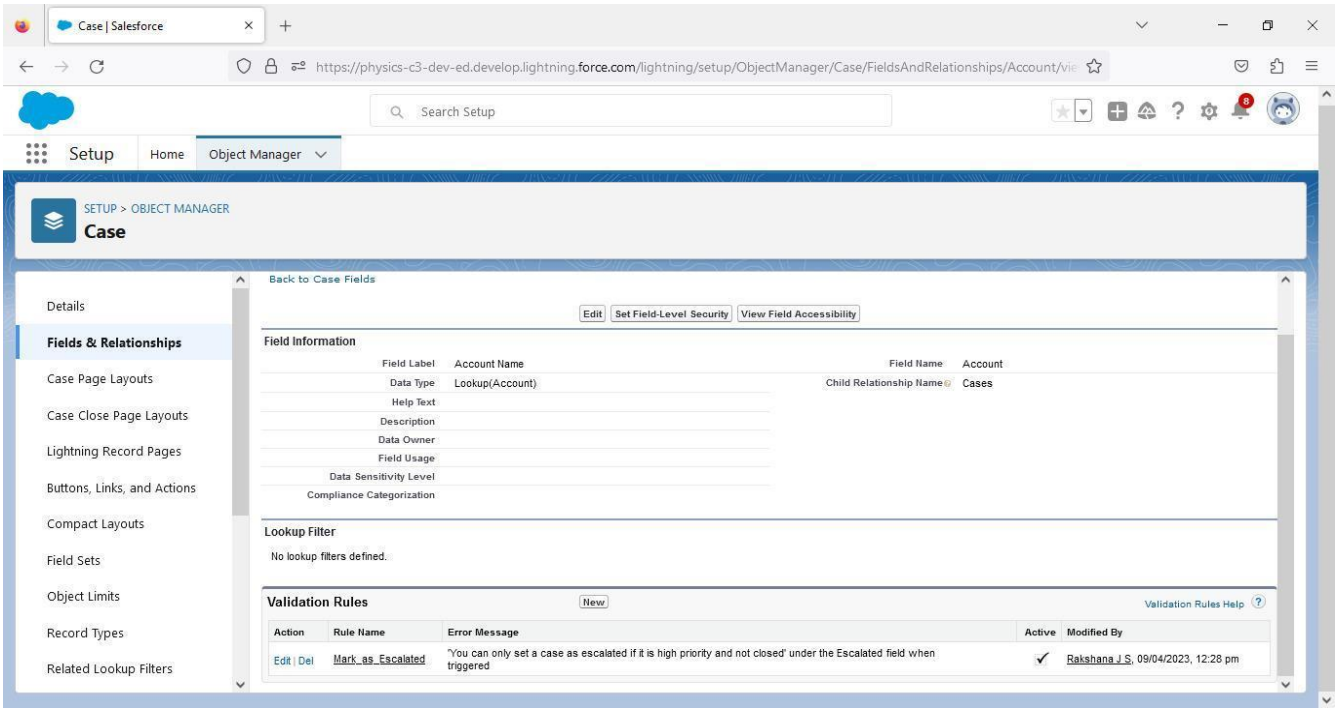

Case | Salesforce
https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Owner/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Case
Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Case Field
Case Owner
Back to Case Fields
Help for this Page
Edit
Set Field-Level Security
View Field Accessibility
Field Information
Field Label Case Owner
Field Name Owner
Data Type Lookup(User,Group)
Help Text
Description
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Validation Rules
New
Validation Rules Help
No validation rules defined.

Milestone-7[Report & Validation rules]



	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Rakshana J S	GenePoint	CA	Customer - Channel	Cold	06/04/2023
2	-	Rakshana J S	United Oil & Gas, UK	UK	Customer - Direct	-	06/04/2023
3	-	Rakshana J S	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	06/04/2023
4	-	Rakshana J S	Edge Communications	TX	Customer - Direct	Hot	06/04/2023
5	-	Rakshana J S	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	06/04/2023
6	-	Rakshana J S	Pyramid Construction Inc.	-	Customer - Channel	-	06/04/2023
7	-	Rakshana J S	Dickenson plc	KS	Customer - Channel	-	06/04/2023
8	-	Rakshana J S	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	06/04/2023
9	-	Rakshana J S	Express Logistics and Transport	OR	Customer - Channel	Cold	06/04/2023
10	-	Rakshana J S	University of Arizona	AZ	Customer - Direct	Warm	06/04/2023
11	-	Rakshana J S	United Oil & Gas Corp.	NY	Customer - Direct	Hot	06/04/2023
12	-	Rakshana J S	sForce	CA	-	-	06/04/2023




Case | Salesforce
https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Account/vie
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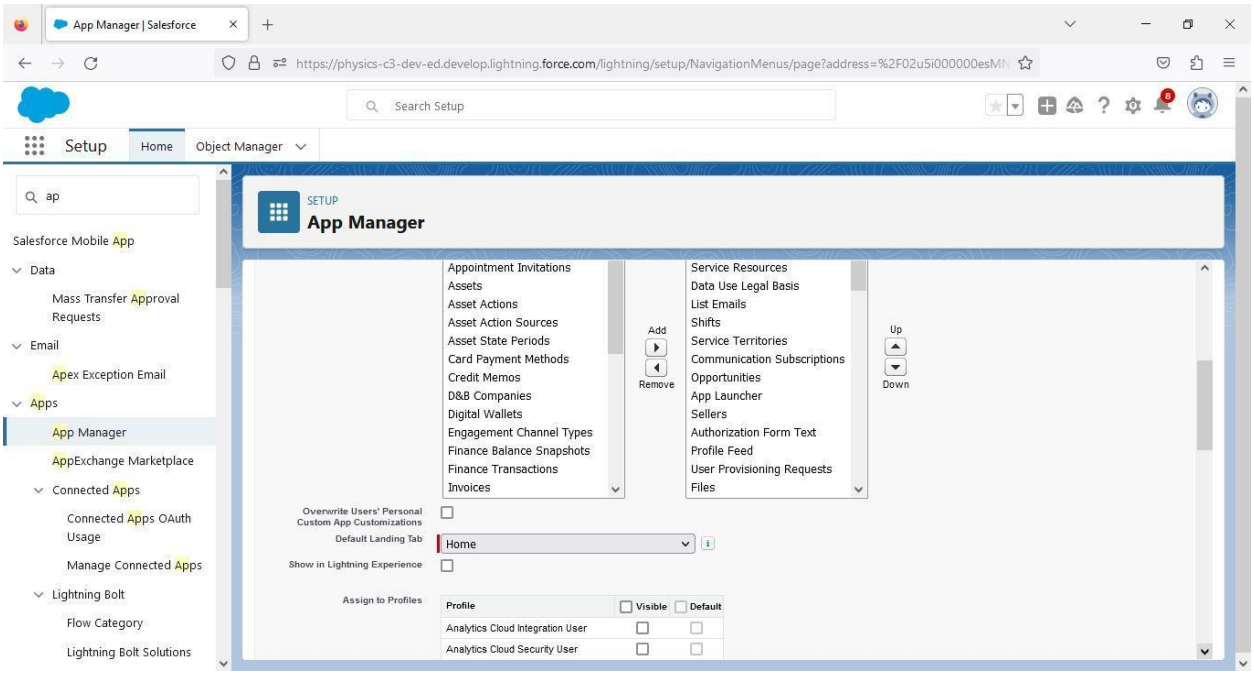
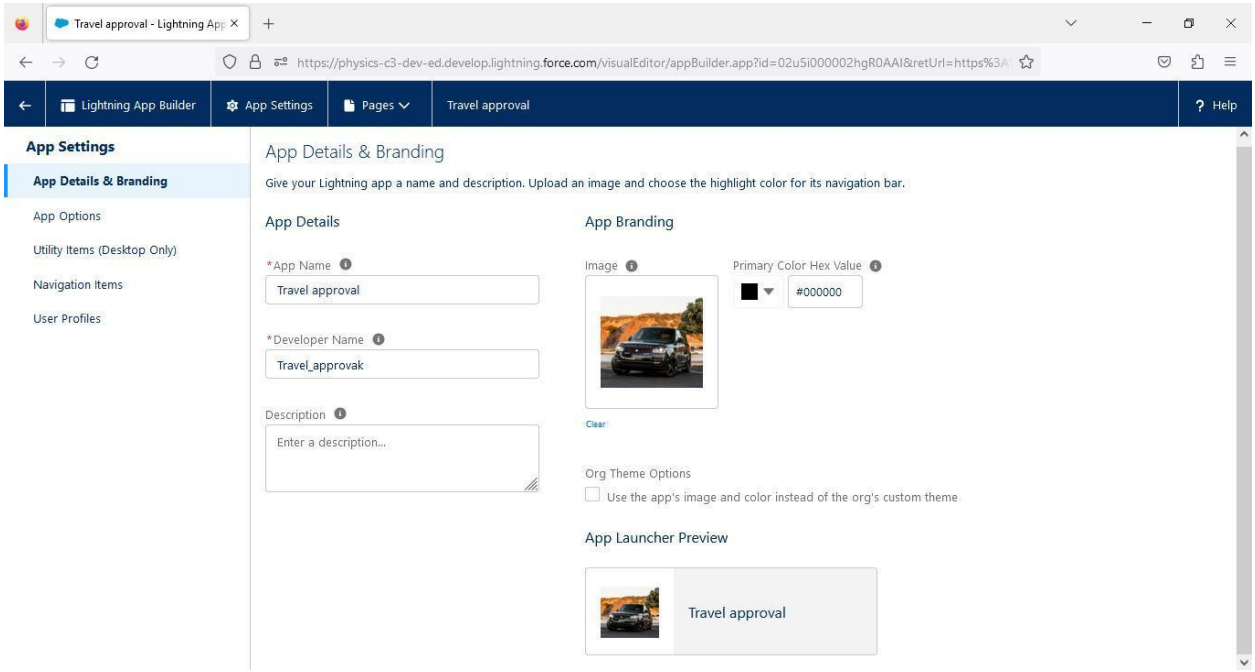
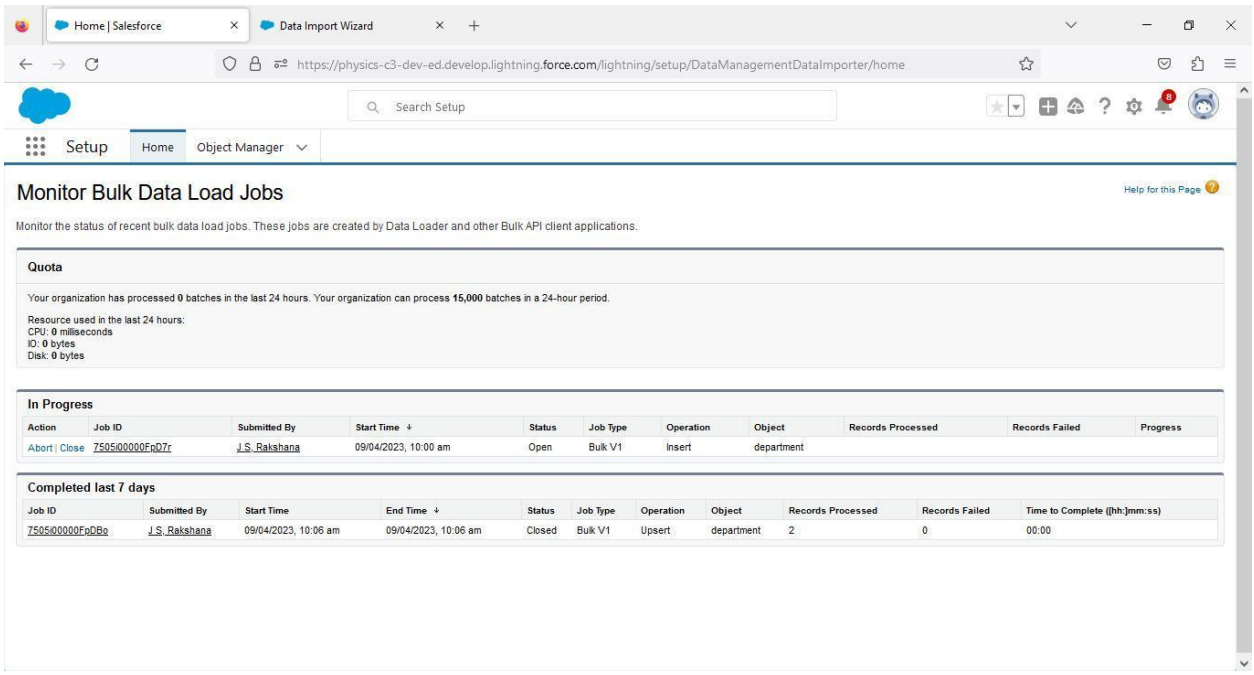
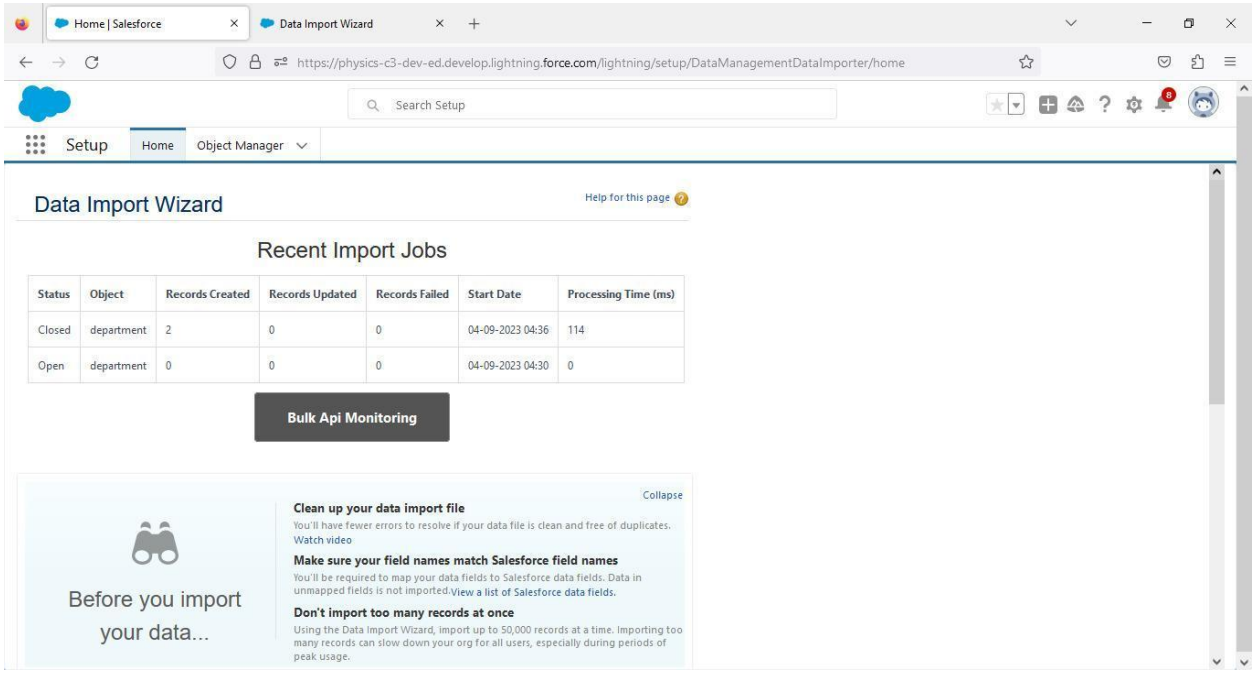
Home
Object Manager
SETUP > OBJECT MANAGER
Case
Details
Fields & Relationships
Case Page Layouts
Case Close Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Back to Case Fields
Edit
Set Field-Level Security
View Field Accessibility
Field Information
Field Label
Account Name
Field Name
Account
Data Type
Lookup(Account)
Child Relationship Name
Cases
Help Text
Description
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Lookup Filter
No lookup filters defined.
Validation Rules
New
Validation Rules Help
Action
Rule Name
Error Message
Active
Modified By
Edit | Del
Mark_as_Escalated
'You can only set a case as escalated if it is high priority and not closed' under the Escalated field when triggered
Rakshana J S, 09/04/2023, 12:28 pm

Milestone-8[App management & dashboard]






Home | Salesforce
Data Import Wizard
https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home
Search Setup
Setup
Home
Object Manager
Monitor Bulk Data Load Jobs
Help for this Page
Monitor the status of recent bulk data load jobs. These jobs are created by Data Loader and other Bulk API client applications.
Quota
Your organization has processed 0 batches in the last 24 hours. Your organization can process 15,000 batches in a 24-hour period.
Resource used in the last 24 hours:
CPU: 0 milliseconds
IO: 0 bytes
Disk: 0 bytes
In Progress
Action
Job ID
Submitted By
Start Time
Status
Job Type
Operation
Object
Records Processed
Records Failed
Progress
Abort | Close
7505i00000FpD7r
J S, Rakshana
09/04/2023, 10:00 am
Open
Bulk V1
Insert
department
Completed last 7 days
Job ID
Submitted By
Start Time
End Time
Status
Job Type
Operation
Object
Records Processed
Records Failed
Time to Complete ([hh:]mm:ss)
7505i00000FpDBo
J S, Rakshana
09/04/2023, 10:06 am
09/04/2023, 10:06 am
Closed
Bulk V1
Upsert
department
2
0
00:00


Home | Salesforce
Data Import Wizard
https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home
Search Setup
Setup
Home
Object Manager
Data Import Wizard
Help for this page
Recent Import Jobs
Status
Object
Records Created
Records Updated
Records Failed
Start Date
Processing Time (ms)
Closed
department
2
0
0
04-09-2023 04:36
114
Open
department
0
0
0
04-09-2023 04:30
0
Bulk Api Monitoring
Collapse
Before you import your data...
Clean up your data import file
You'll have fewer errors to resolve if your data file is clean and free of duplicates.
Watch video
Make sure your field names match Salesforce field names
You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported.View a list of Salesforce data fields.
Don't import too many records at once
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Demo Video Link:

https://drive.google.com/file/d/1LrEa7_qMCPwLisfy3UI2H2Ra9IfFHIo-/view

Trial head URL:

Team Leader: Nurselin Ashik C

https://www.salesforce.com/trailblazer/nurselinashik

Team Member1: Ashish T N

https://www.salesforce.com/trailblazer/ashishtn

Team Member2: Jefhrin Spahan A M

https://www.salesforce.com/trailblazer/jefhrinspahan

Team Member3: Raju R

https://www.salesforce.com/trailblazer/rajur85138evysiej