

NAAN MUDHALVAN

PROJECT REPORT

on

[SALESFORCE]

Employee-travel approval application for corporates

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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:

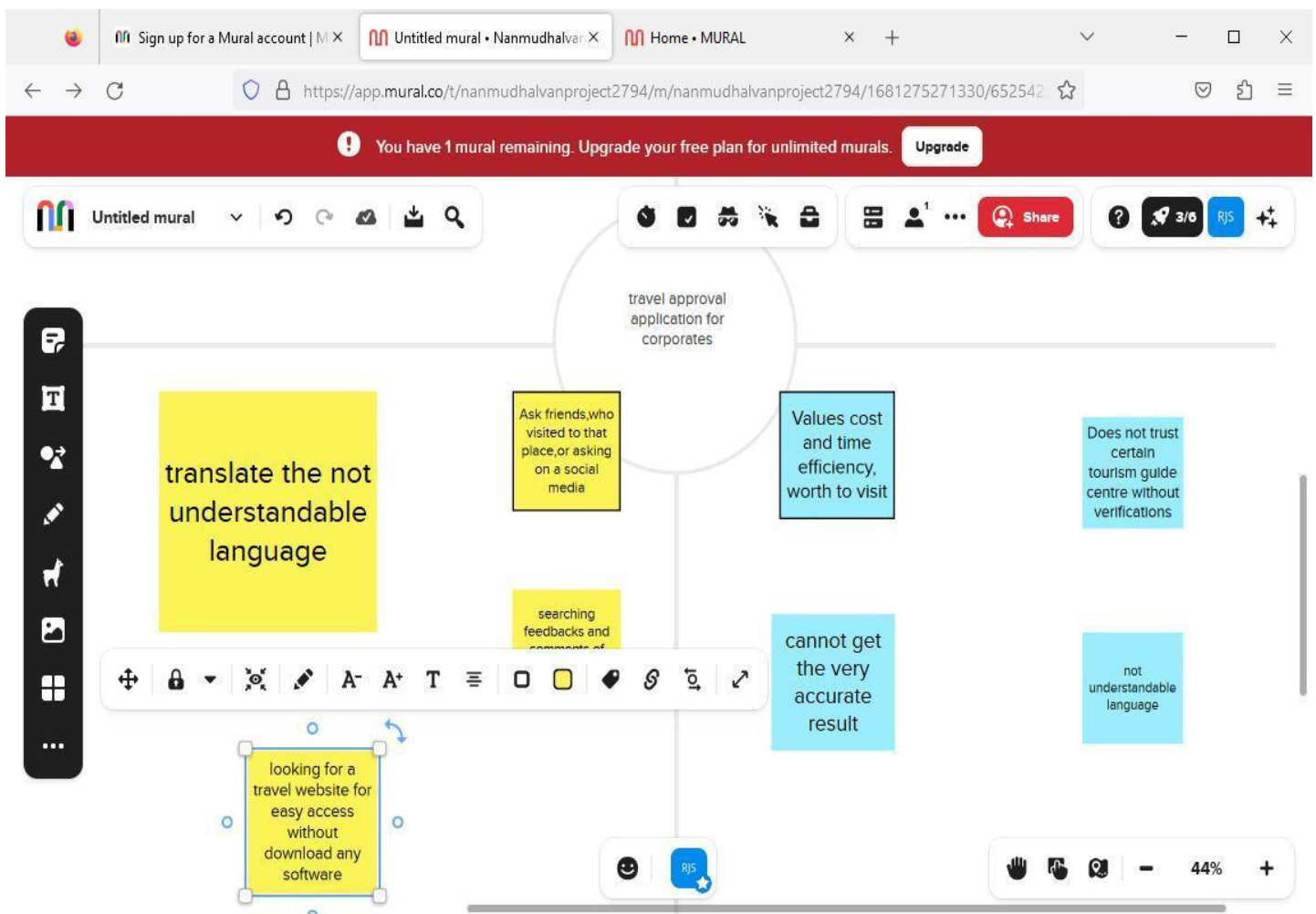
Pre trip approval is to control undesirable travel buying behaviours of employee cost

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

2.Problem Definition & Design Thinking

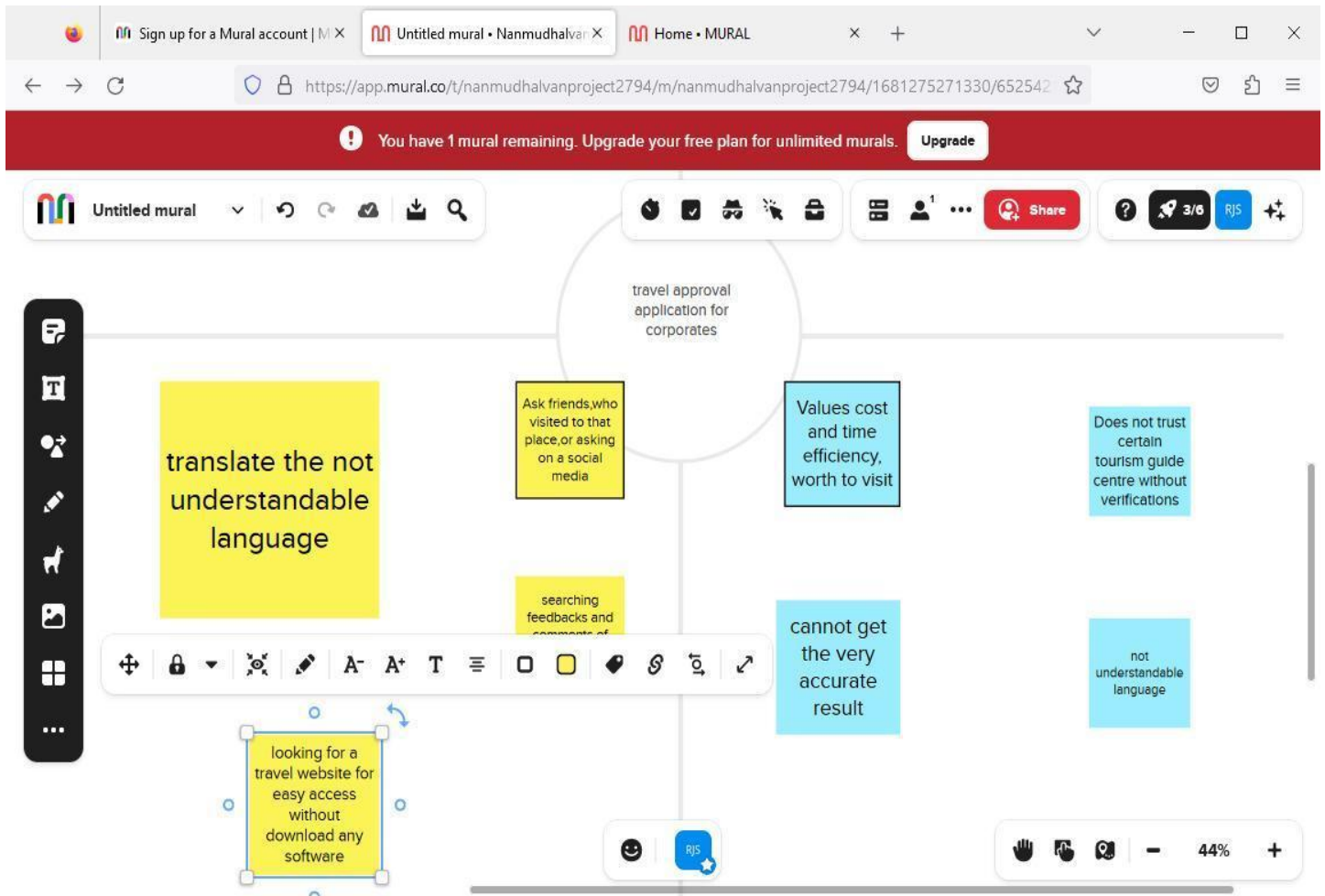
Empathy Map:

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



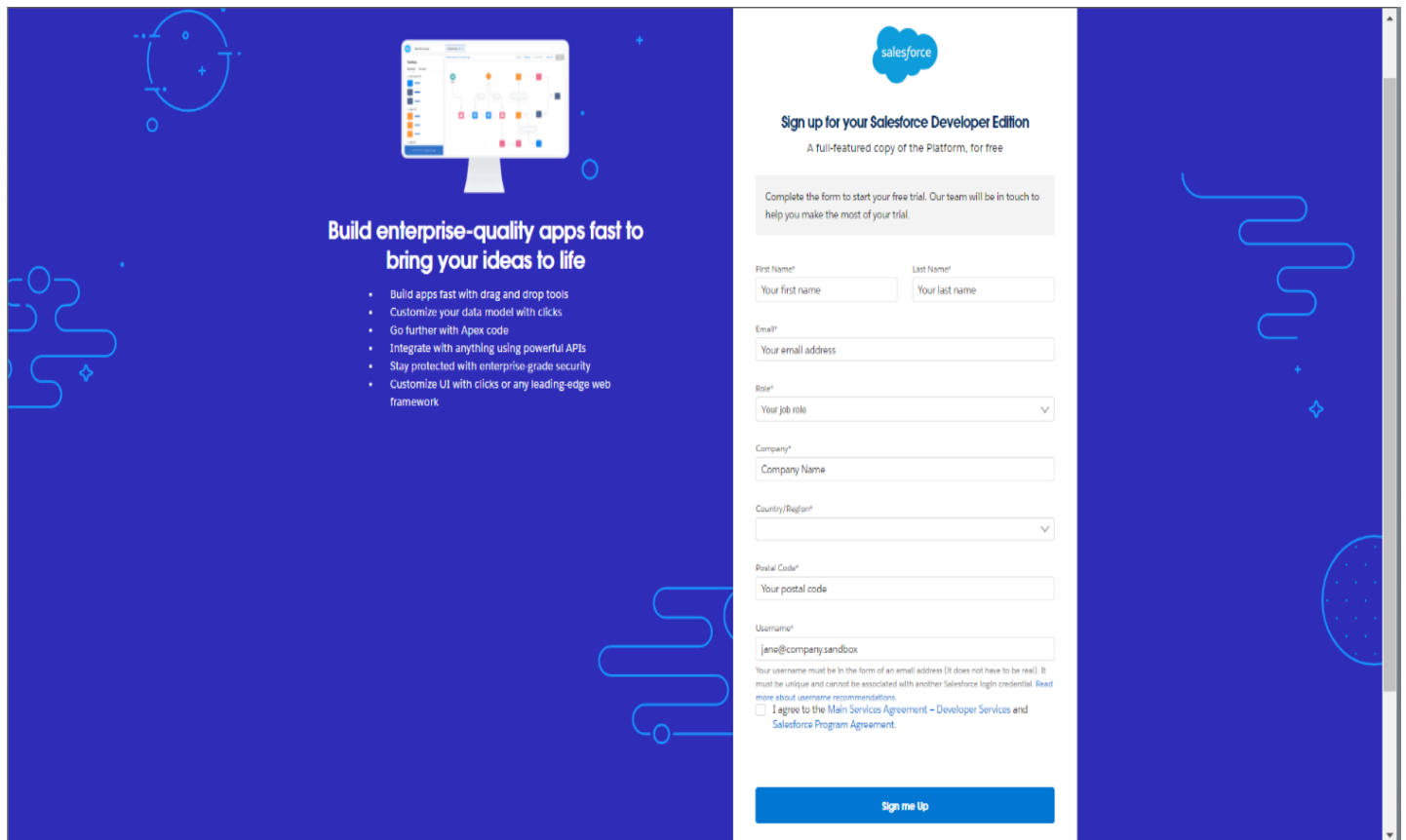
Ideation & Brainstorming Map

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:



The image shows the Salesforce Developer Edition sign-up page. The left side features a blue background with white text and icons. The right side is a white form with blue accents. The form includes fields for First Name, Last Name, Email, Role, Company, Country/Region, Postal Code, and Username. A 'Sign me Up' button is at the bottom.

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Country/Region*
Country/Region

Postal Code*
Your postal code

Username*
jane@company.sandbox

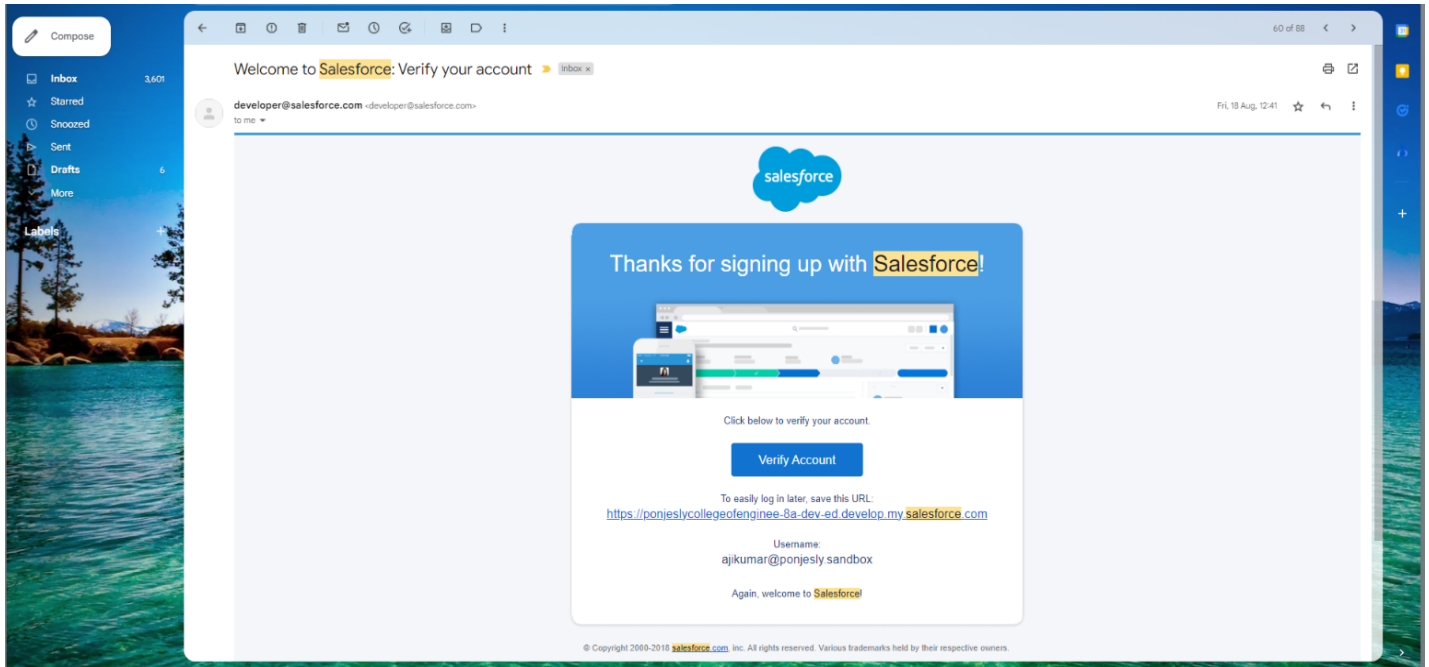
Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.

Sign me Up

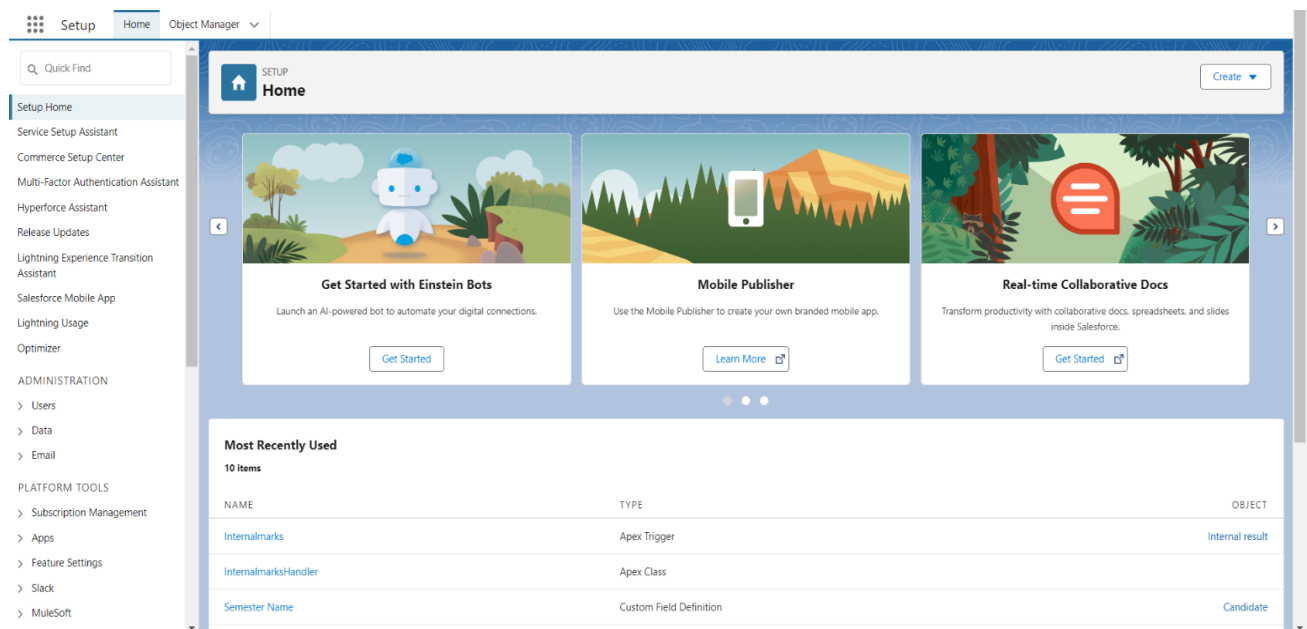
Account Activation

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:

The screenshot shows the 'New Custom Object' setup page in Salesforce. The browser address bar indicates the URL: `https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new`. The page title is 'New Custom Object'. The 'Custom Object Information' section is active, showing fields for 'Label' (Account), 'Plural Label' (Accounts), 'Object Name' (Accounts), and 'Description'. The 'Context-Sensitive Help Setting' is set to 'Open the standard Salesforce.com Help & Training window'. The 'Starts with vowel sound' checkbox is unchecked.

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information ⓘ = Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

The screenshot shows the 'New Custom Object' setup page in Salesforce. The browser address bar indicates the URL: `https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new`. The page title is 'New Custom Object'. The 'Enter Record Name Label and Format' section is active, showing fields for 'Record Name' (Accounts Name), 'Data Type' (Text), and 'Optional Features' (Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, Enable Licensing). The 'Object Classification' section is also visible, showing settings for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'.

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Example: Account Name

Data Type:

Optional Features

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing ⓘ

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status ⓘ What is this?

Case | Salesforce x Data Import Wizard x +

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/page?address=

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](#)

[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 [i](#)

Case | Salesforce x Data Import Wizard x +

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

← → ↺

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/PageLayouts/00h5i00000BNiSGAA

☆

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

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

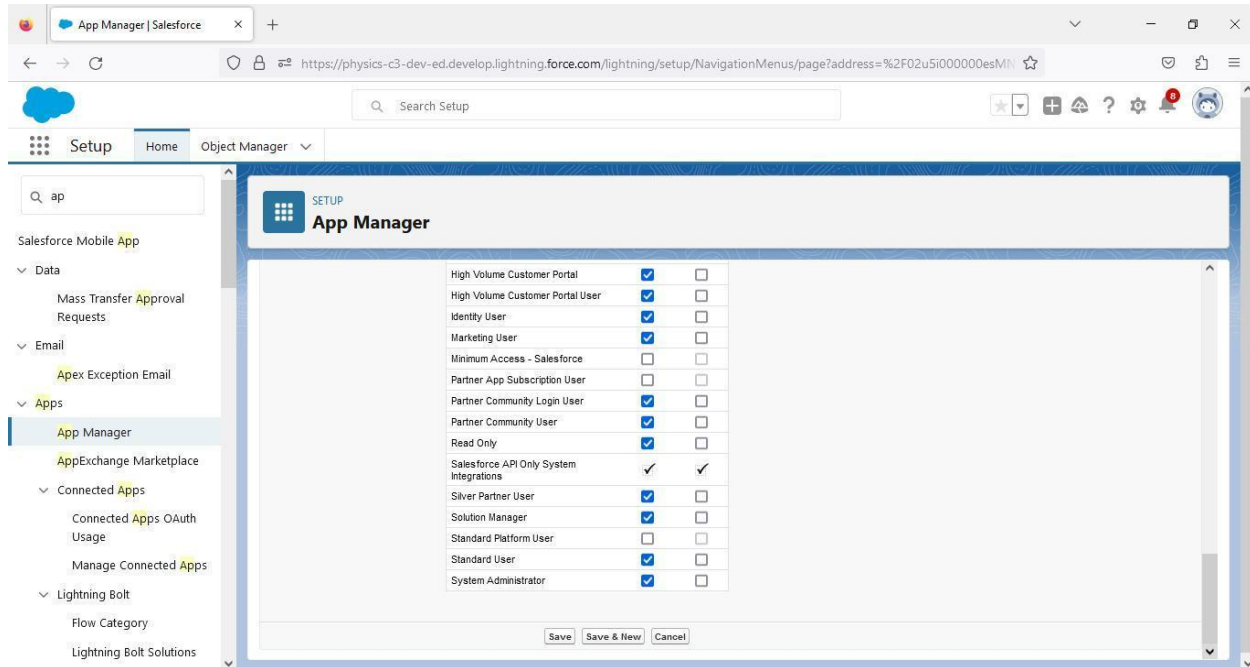
Subject	Name	Task	Due Date	Status	Priority	Assigned To
Sample Text	Sample Text	✓	11/04/2023, 7:08 pm	Sample Text	Sample Text	Sarah Sample

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

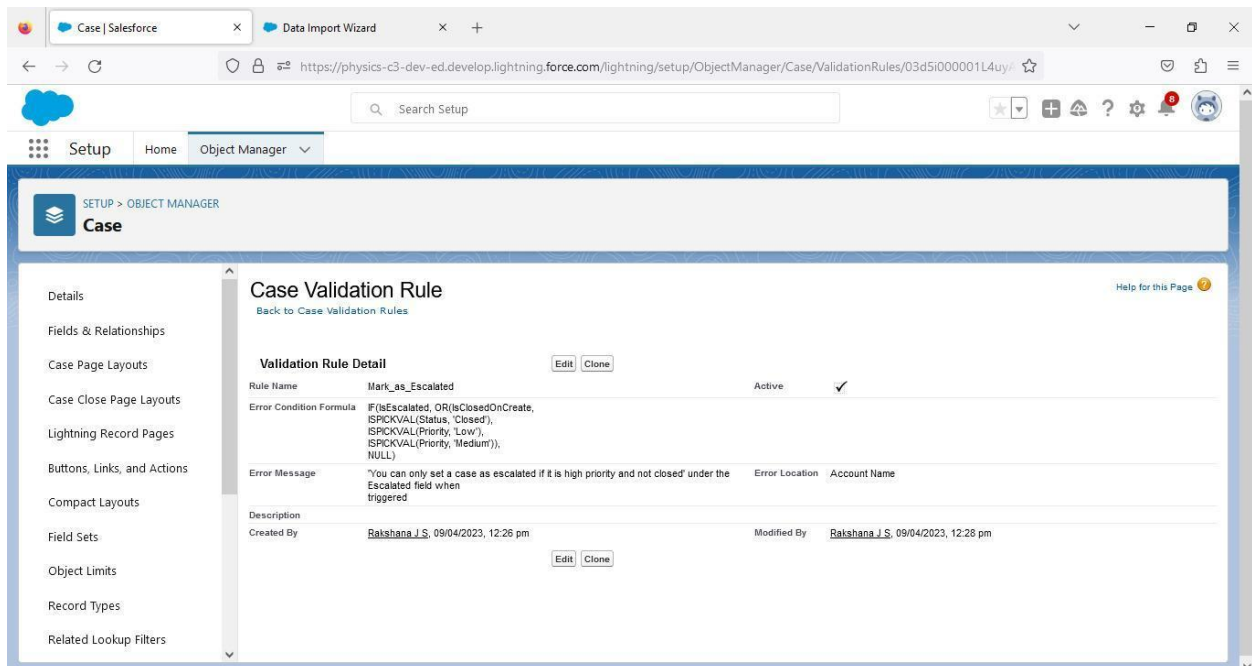
Milestone-3[Creating App]



The screenshot shows the Salesforce App Manager setup page. The left sidebar contains a navigation menu with options like Data, Email, Apps, App Manager, AppExchange Marketplace, Connected Apps, Lightning Bolt, Flow Category, and Lightning Bolt Solutions. The main content area is titled 'App Manager' and displays a table of system users with checkboxes for selection.

User	Selected	Available
High Volume Customer Portal	<input checked="" type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Minimum Access - Salesforce	<input type="checkbox"/>	<input type="checkbox"/>
Partner App Subscription User	<input type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce API Only System Integrations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Silver Partner User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Buttons at the bottom: Save, Save & New, Cancel.



The screenshot shows the Salesforce Case Validation Rule setup page. The left sidebar contains a navigation menu with options like 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, and Related Lookup Filters. The main content area is titled 'Case Validation Rule' and displays the details of a validation rule.

Case Validation Rule

Back to Case Validation Rules

Validation Rule Detail [Edit] [Clone]

Rule Name: Mark_as_Escalated Active: ☒

Error Condition Formula: IF(IsEscalated, OR(IsClosedOnCreate, ISPICKVAL(Status, 'Closed'), ISPICKVAL(Priority, 'Low'), ISPICKVAL(Priority, 'Medium')), NULL)

Error Message: *You can only set a case as escalated if it is high priority and not closed* under the Escalated field when triggered. Error Location: Account Name

Description: Created By: Ratishana J.S. 09/04/2023, 12:26 pm Modified By: Ratishana J.S. 09/04/2023, 12:26 pm

[Edit] [Clone]

Case | Salesforce x Data Import Wizard x +

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/ValidationRules/view

Search Setup

Setup Home 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 x Data Import Wizard x +

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/ValidationRules/03d5i000001L4utA

Search Setup

Setup Home 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

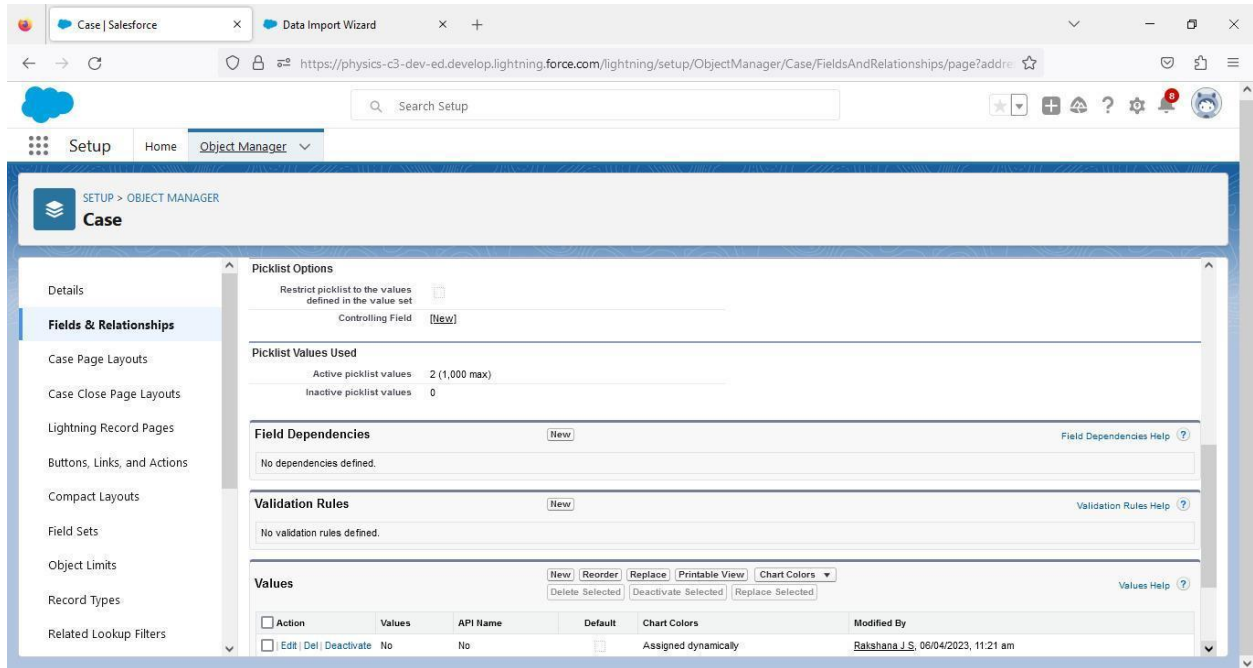
Validation Rule Detail

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

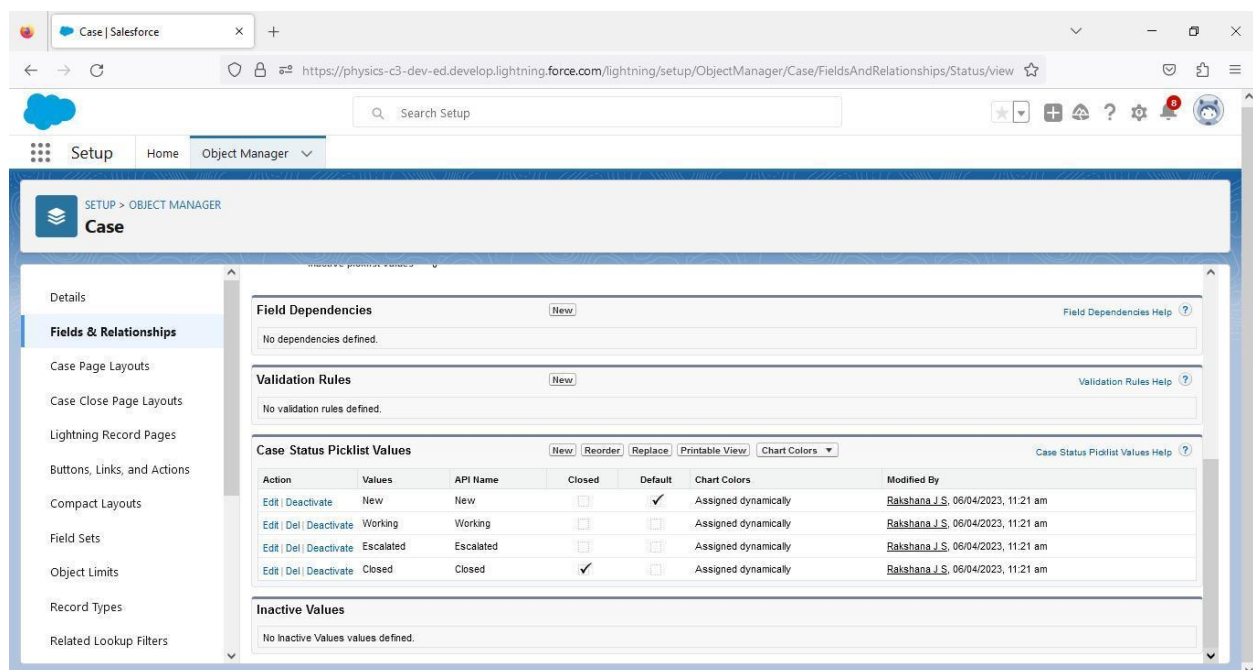
Edit Clone

Milestone-4[Fields & relationship]



This screenshot shows the Salesforce Setup interface for the 'Case' object. The left sidebar contains a navigation menu with options like 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, and Related Lookup Filters. The main content area is titled 'Case' and includes sections for Picklist Options, Picklist Values Used, Field Dependencies, Validation Rules, and Values. The 'Values' section displays a table with columns for Action, Values, API Name, Default, Chart Colors, and Modified By.

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit <input type="checkbox"/> Del <input type="checkbox"/> Deactivate	No	No	<input type="checkbox"/>	Assigned dynamically	Rakshana J S, 06/04/2023, 11:21 am



This screenshot shows the Salesforce Setup interface for the 'Case' object, specifically the 'Case Status Picklist Values' section. The left sidebar is the same as the previous screenshot. The main content area includes sections for Field Dependencies, Validation Rules, Case Status Picklist Values, and Inactive Values. The 'Case Status Picklist Values' section displays a table with columns for Action, Values, API Name, Closed, Default, Chart Colors, and Modified By.

Action	Values	API Name	Closed	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit <input type="checkbox"/> Del <input type="checkbox"/> Deactivate	New	New	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assigned dynamically	Rakshana J S, 06/04/2023, 11:21 am
<input type="checkbox"/> Edit <input type="checkbox"/> Del <input type="checkbox"/> Deactivate	Working	Working	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Rakshana J S, 06/04/2023, 11:21 am
<input type="checkbox"/> Edit <input type="checkbox"/> Del <input type="checkbox"/> Deactivate	Escalated	Escalated	<input type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Rakshana J S, 06/04/2023, 11:21 am
<input type="checkbox"/> Edit <input type="checkbox"/> Del <input type="checkbox"/> Deactivate	Closed	Closed	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Assigned dynamically	Rakshana J S, 06/04/2023, 11:21 am

Case | Salesforce

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Status/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
Status
[Back to Case Fields](#)

[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?address=

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

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
<input type="checkbox"/> Edit Del Deactivate	No	No	<input type="checkbox"/>	Assigned dynamically	Rakshana J S, 06/04/2023, 11:21 am
<input type="checkbox"/> Edit Del Deactivate	Yes	Yes	<input type="checkbox"/>	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]

This screenshot shows the Salesforce Object Manager interface for the 'department' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is divided into two columns. The left column contains the following fields: Description (empty), API Name (department__c), Custom (checked), Singular Label (department), and Plural Label (departments). The right column contains the following fields: Enable Reports (checked), Track Activities (checked), Track Field History (empty), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window).

department | Salesforce

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000001zInt/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
department

Details Edit Delete

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name
department__c

Custom
✓

Singular Label
department

Plural Label
departments

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

This screenshot shows the 'New Custom Object' setup page in Salesforce. The left sidebar contains a navigation menu with options: Setup, Home, and Object Manager. The main content area is titled 'New Custom Object' and includes a 'What is this?' link. The 'Object Classification' section contains the following fields: Allow Sharing (checked), Allow Bulk API Access (checked), and Allow Streaming API Access (checked). The 'Deployment Status' section contains the following fields: In Development (radio button) and Deployed (radio button, selected). The 'Search Status' section contains the following fields: Allow Search (checked). The 'Object Creation Options (Available only when custom object is first created)' section contains the following fields: Add Notes and Attachments related list to default page layout (checkbox) and Launch New Custom Tab Wizard after saving this custom object (checkbox). At the bottom of the page are three buttons: Save, Save & New, and Cancel.

New Custom Object | SalesforceX

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Search Setup

Setup Home Object Manager

SETUP
New Custom Object

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status [What is this?](#)

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

Milestone-6 [Page layout & Travel approval]

This screenshot shows the Salesforce Setup interface for configuring the 'Case' object page layout. The left sidebar contains a navigation menu with options like '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', and 'Related Lookup Filters'. The main content area is titled 'Case (Sales) Layout' and includes a 'Quick Find' search bar, a 'Fields' list on the left, and a 'Layout Properties' table on the right. Below the table is a 'Case Sample' section with a 'Highlights Panel' showing fields like Customer, Case Number, Created Date, Status, Priority, and Case Owner.

Case (Sales) Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

- Buttons
- Custom Links
- Quick Actions
- Mobile & Lightning Actions
- Expanded Lookups
- Related Lists

Layout Properties

Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	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	

Case Sample

Highlights Panel

Customer: Sample Text
Case Number: GEN-2004-001234
Created Date: 11/04/2023, 7:08 pm
Status: Sample Text
Priority: Sample Text
Case Owner: Sample Text

This screenshot shows the Salesforce Setup interface for configuring the 'Case Close Page Layout'. The left sidebar is the same as the previous screenshot. The main content area is titled 'Case Close Page Layout' and includes a 'Quick Find' search bar, a 'Fields' list on the left, and a 'Layout Properties' table on the right. Below the table is a 'Case Detail' section with a 'Highlights Panel' showing fields like Case Information, Status, Case Reason, Internal Comments, and Total Expenses.

Case Close Page Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

- Report Charts

Layout Properties

Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name	Field Name
Section	Case Origin	Created By	Internal Comments	SLA Violation	Type	Web Phone	
Blank Space	Case Owner	Date/Time Opened	Potential Liability	Status	Web Company		
Account Name	Case Reason	Description	Priority	Subject	Web Email		
Case Number	Contact Name	Engineering Req N...	Product	Total Expenses	Web Name		

Case Detail

Customize the highlights panel for this page layout...

Case Information (Header visible on edit only)

- Status: Sample Text
- Case Reason: Sample Text
- Internal Comments: Sample Text
- Total Expenses: 11/04/2023, 7:08 pm

Case | Salesforce

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/CaseNumber

Search Setup

Setup Home 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

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

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

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

No validation rules defined.

Validation Rules Help

Milestone-7[Report & Validation rules]

Browser tabs: New Accounts Report | Salesforce, Data Import Wizard

URL: <https://physics-c3-dev-ed.develop.lightning.force.com/lightning/r/Report/00O5i000007HBa2EAG/view?queryScope=userFolders>

Lightning Usage App | Lightning Usage | Accounts | New Accounts Report

Report: Accounts
New Accounts Report

Total Records: 12

Enable Field Editing | Add Chart | Edit

	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

Browser tabs: Case | Salesforce

URL: <https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Asset/view>

Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Case

Case Field
Asset
Back to Case Fields

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

Edit | Set Field-Level Security | View Field Accessibility

Field Information

Field Label	Asset	Field Name	Asset
Data Type	Lookup(Asset)	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](#)

No validation rules defined.

Case | Salesforce

https://physics-c3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Case/FieldsAndRelationships/Account/vie

Search Setup

SetupHomeObject 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

EditSet Field-Level SecurityView 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.

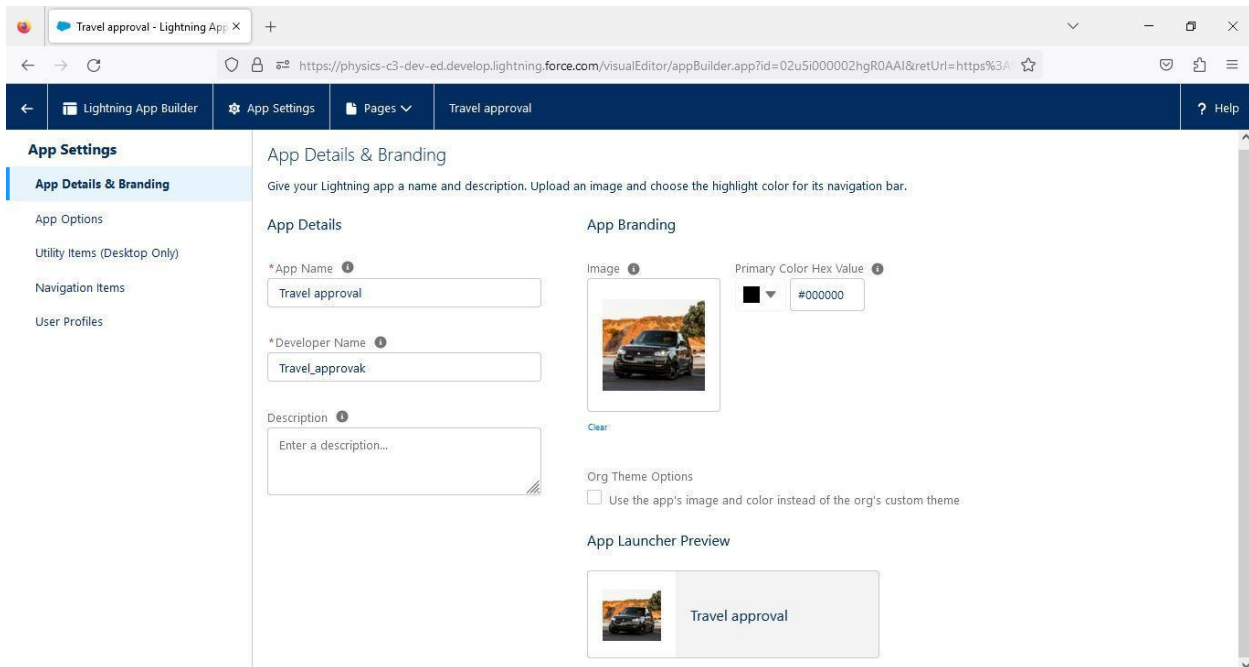
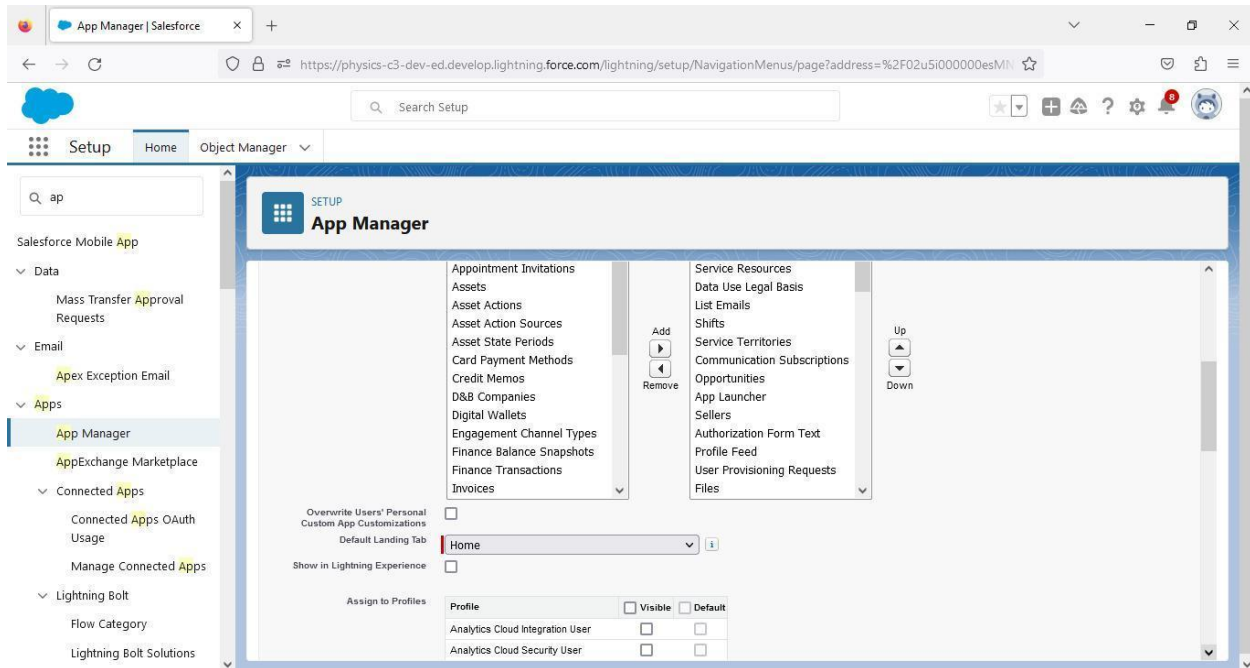
Validation Rules

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

SetupHomeObject Manager

Monitor Bulk Data Load Jobs

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	Z50500000F0D7r	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)
Z50500000F0DBo	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


SetupHomeObject Manager

Data Import Wizard

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



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_qMCPwLisfy3UI2H2Ra9IfFHlo-/view

Trial head URL:

Team Leader: Nurselin Ashik C

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

Team Member1: Ashish T N

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Team Member3: Raju R

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

