



## BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

**Project Based Experiential Learning Program**



## Build A Employee Travel Approval Application for corporates

This Project helps in sending your travel approval requests to your manager in place of emails.

### Project Description

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

### What you'll learn

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce

### Milestone 1- Create Salesforce Org:

#### Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

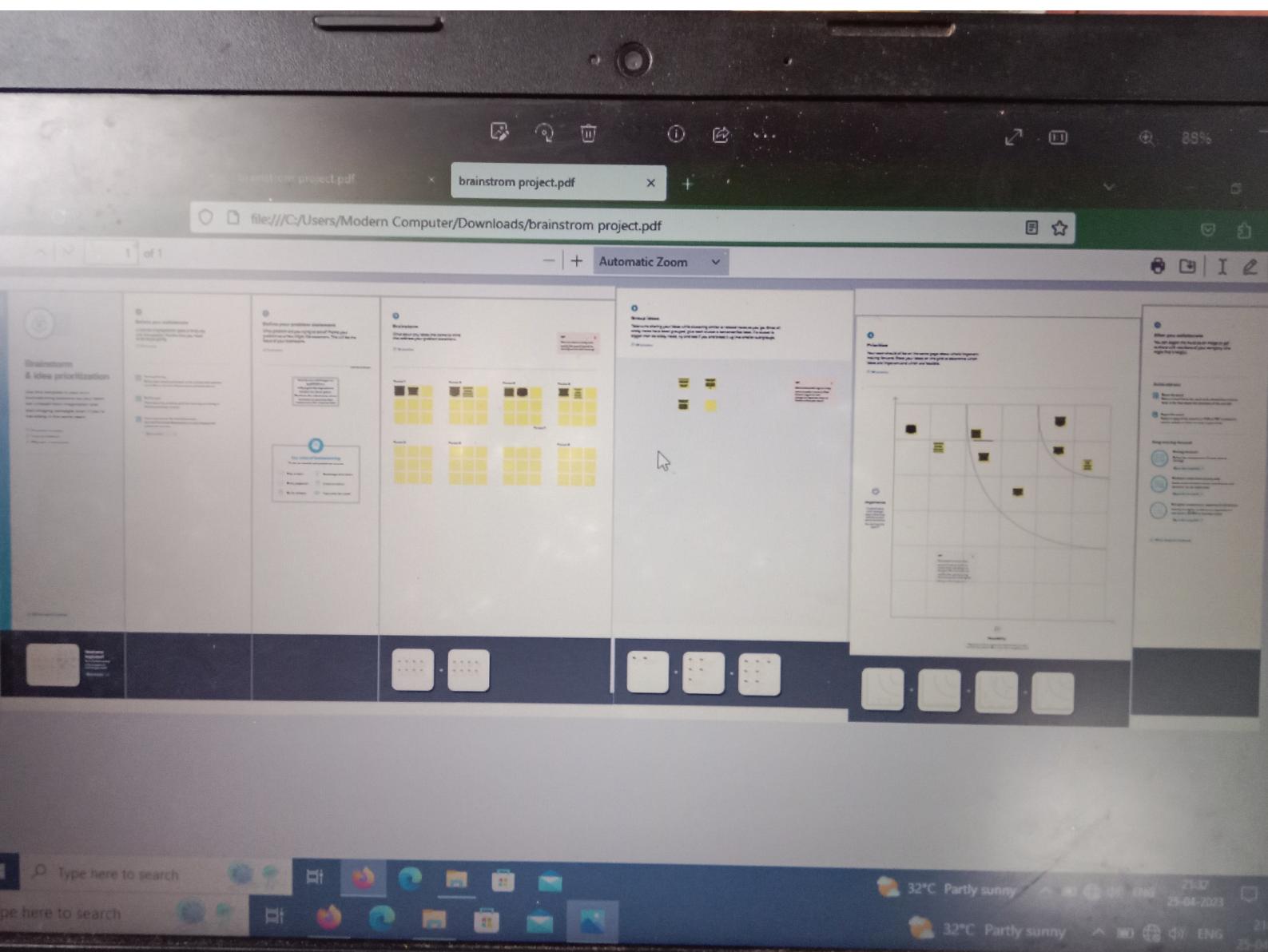
#### What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3lGde5k>



logins.salesforce.com

G

Gmail YouTube Maps

**salesforce**

Username 1 Saved Username  
vidhyamuthaiya@company.sandbox

Password

Log In

Remember me

Forgot Your Password? Use Custom Domain

Not a customer? Try for Free

Sell, market, and service with the world's #1 CRM.

Welcome to the Salesforce Customer Success Platform. Our new Lightning Platform gives you the fastest, most complete way to put your customers at the centre of everything you do.

WATCH DEMOS FREE TRIAL

Is this warm enough to ski in?

Yes, it's good down to -10 F

Service

Jay Sharma Loyalty Member

32°C Partly sunny

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Type here to search

hp

Home | Salesforce

kalamkarunamdhugov6-dev-ed.lightning.force.com/lightning/setup/SetupOneHome/home

Gmail YouTube Maps

Search Setup

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Type here to search

SETUP Home

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

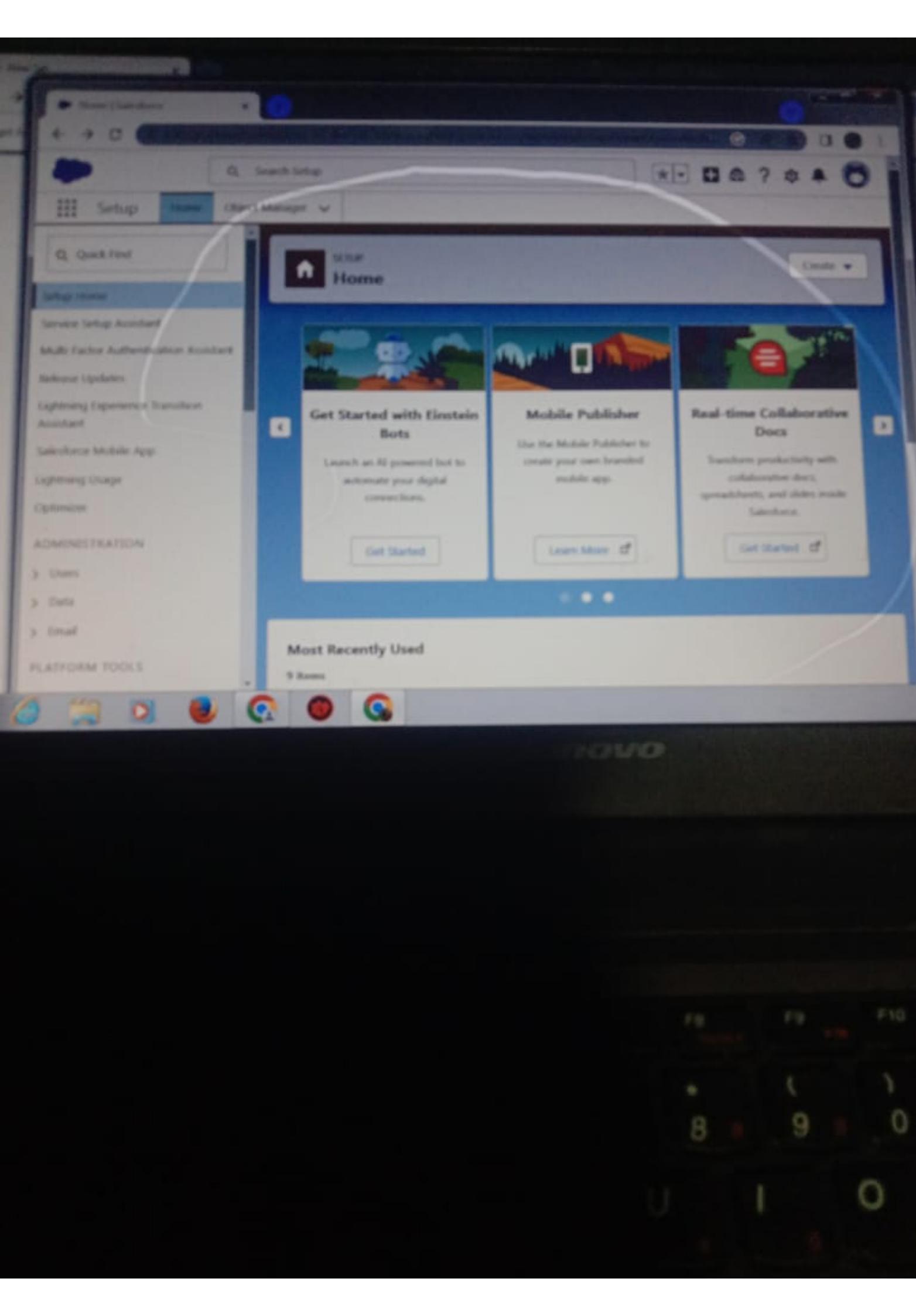
Most Recently Used

9 items

HP

32°C Partly sunny 21:23 25-04-2023

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with navigation links for Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with sub-links for Users, Data, Email), Platform Tools, and Subscription Management. A search bar at the top right says "Search Setup". The main content area has three cards: "Get Started with Einstein Bots" (with a "Get Started" button), "Mobile Publisher" (with a "Learn More" button), and "Real-time Collaborative Docs" (with a "Get Started" button). Below these cards is a section titled "Most Recently Used" with a note "9 items". At the bottom, there's a taskbar with icons for File, Home, Object Manager, and Help, along with system status indicators for weather (32°C, Partly sunny), time (21:23), date (25-04-2023), language (ENG), and battery level.



File

Object Manager | Salesforce

Jobs | Salesforce

Users | Salesforce

https://kalangkarunansidhigovt3d-dev-ed.develop.lightning.force.com/lightning/s/lightningManageUsers/page/last

Setup Home Object Manager

Search Setup

Q users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

**Users**

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?  
Try using Global Search.

SETUP

Users

New User

User Edit

Save Save & New Cancel

General Information

I - Required Information

First Name: karthi

Last Name: ka N

Role: <None Specified>

User License: Force.com - Free

Profile: Force.com - Free User

Active:

Marketing User:

Offline User:

Title: build an employee travel app

Company: kalangkarunansidhigovt3d

Department: physics

Division: salesforce

Knowledge User:

Flow User:

Service Client User:

Salesforce Contributor:

New Tab

Object Manager | Sales| Tabs | Salesforce Travel approval | Sales| Object creator

To get full functionality, log in to your organization.

kataignarkarunandhigave-3d-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5i00...

travel

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Travel approval

Travel approval Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is evaluated as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Name: total\_expenses

Action:

Description:

Error Condition Formula:

Example: Discount\_Percent <> 0.20 More Examples

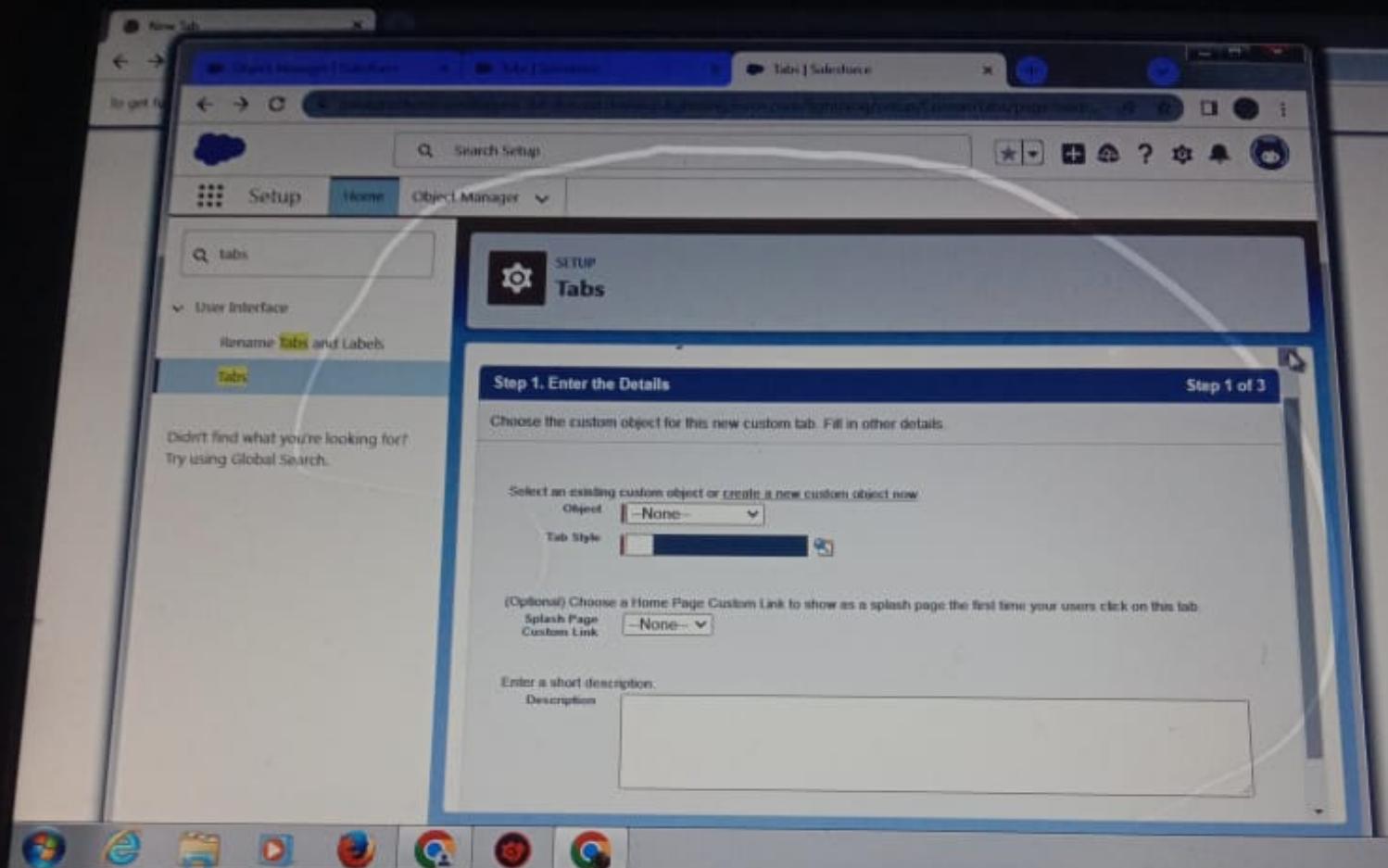
Display an error if Discount is more than 20%.

If this formula expression is true, display the text defined in the Error Message area.

Insert Field Insert Operator

Quick Tips: + Functions & Formulas

Functions: All Function Categories ABS ACOS ADDMONTHS



New Tab

Object Manager | Salesforce | Tabs | Salesforce | Users | Salesforce

kalaikarunandhigov-3d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Cloud Search Setup

Setup Home Object Manager

Q users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

All Users

Help for this Page

View: All Users Edit | Cases New View

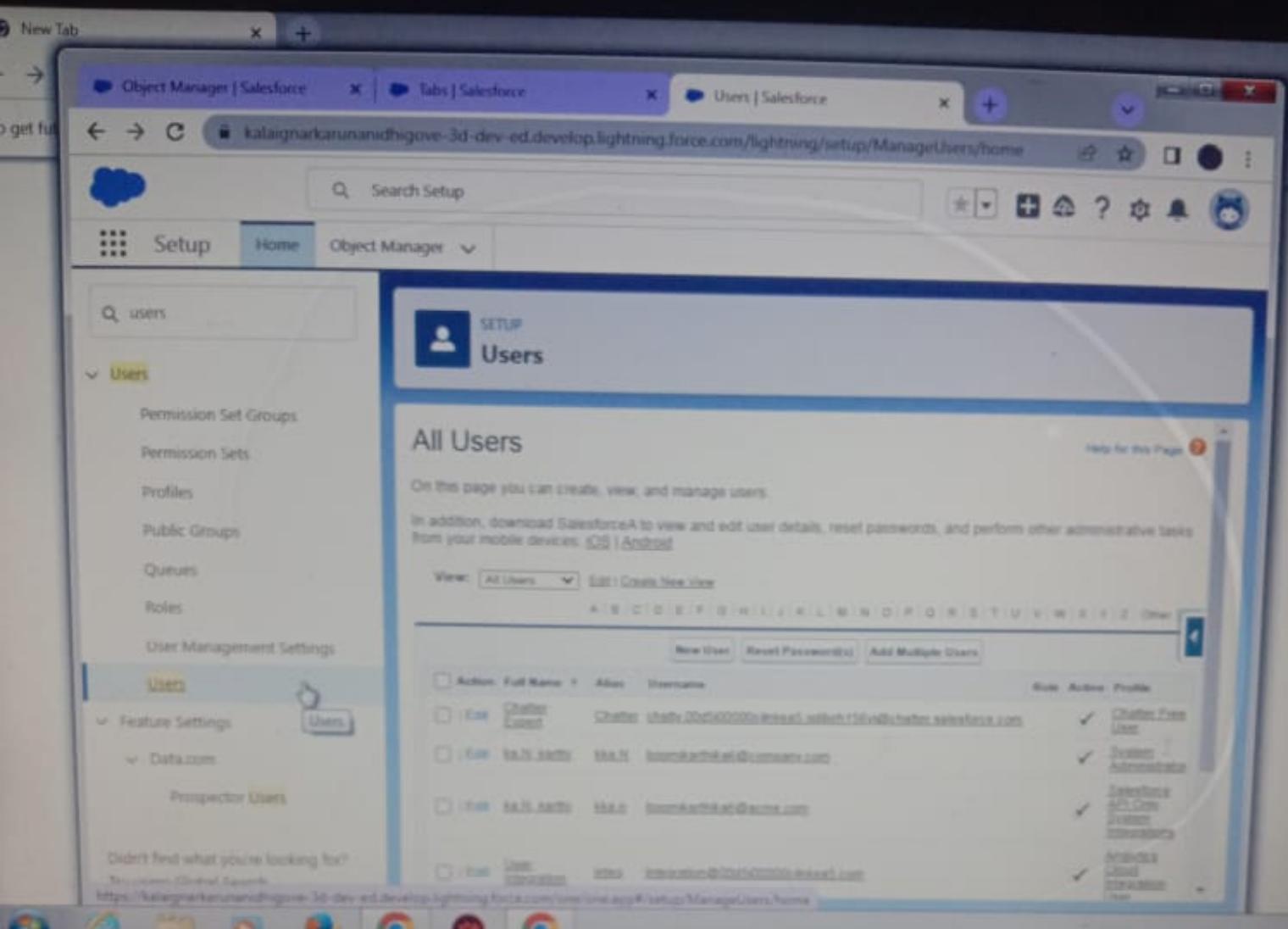
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z User

New User Reset Passwords Add Multiple Users

Action	Full Name	Alias	Username	Note	Active	Profile
<input type="checkbox"/>	Kalai Shanthi	Shanter	shanter.20x14000@inmobi.com,shanter.150v@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Kalai Shanthi	Shanter	shanter.150v@chatter.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Kalai Shanthi	Shanter	shanter.400t@inmobi.com		<input checked="" type="checkbox"/>	System Admin
<input type="checkbox"/>	Kalai Shanthi	Shanter	shanter.400t@inmobi.com		<input checked="" type="checkbox"/>	Analyst

Didn't find what you're looking for? Try a search. [Global Search](#)

https://kalaikarunandhigov-3d-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home



New Tab

Object Manager | Salesforce New Custom Object | Salesforce kalaignarkarunanidhigove-3d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Search Setup

Setup Home Object Manager

**SETUP**

## New Custom Object

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**

In Development  
 Deployed

**Search Status**

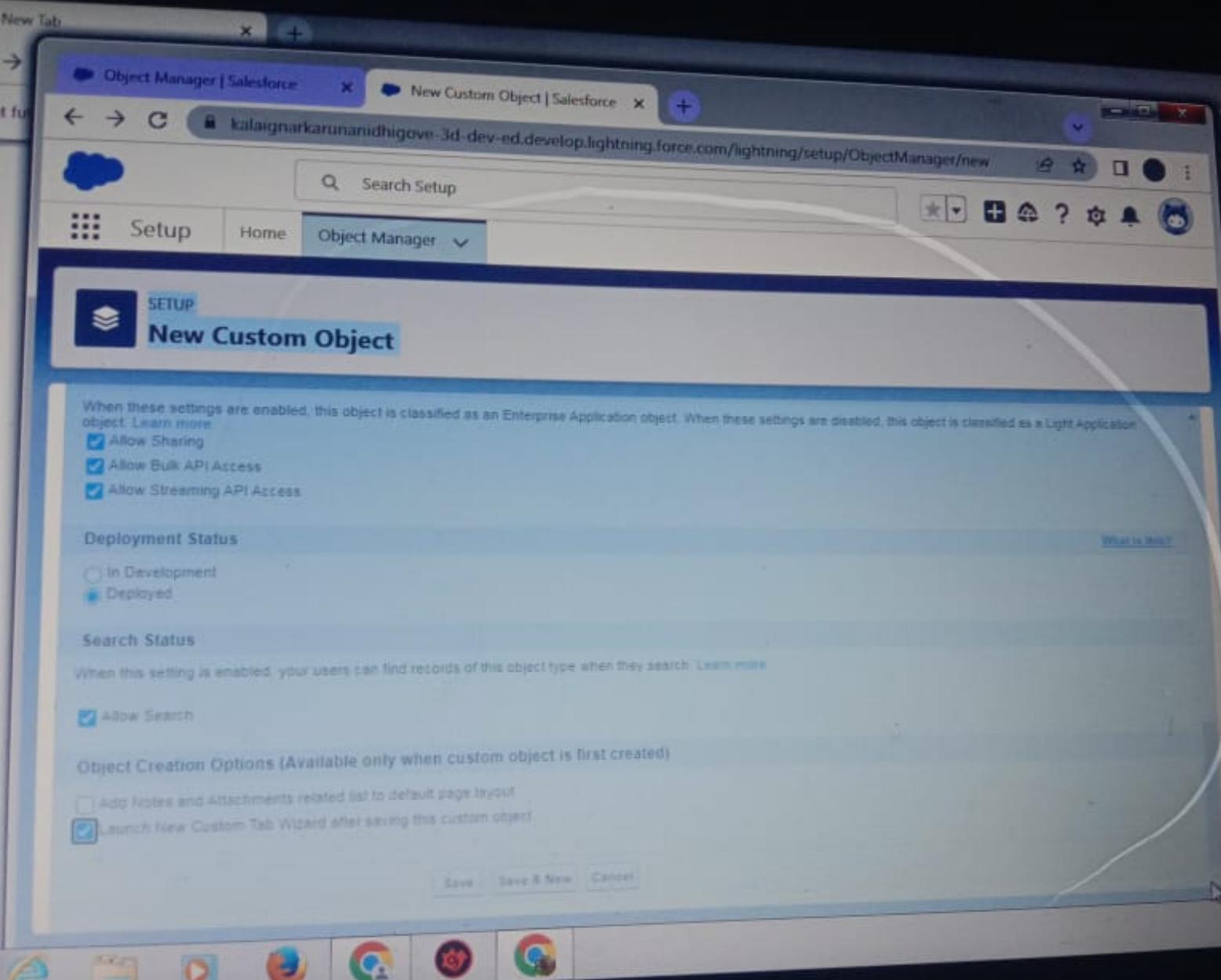
When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

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



Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Dashboard Recent 2 items

DASHBOARDS

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Karthika		Private Dashboards	Karthika.N	24/4/2023, 12:25 pm	

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

New Dashboard New Dashboard

scriptvoid()

Object Manager | Salesforce    Info | Salesforce    Travel approval | Salesforce

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Travel approval**

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters

Travel approval New Custom Field Step 2: Enter the details Step 2 of 4

Field Label: Travel approval

Display Format: Integer 6 Example: A (0000) what is this?

Starting Number: 1

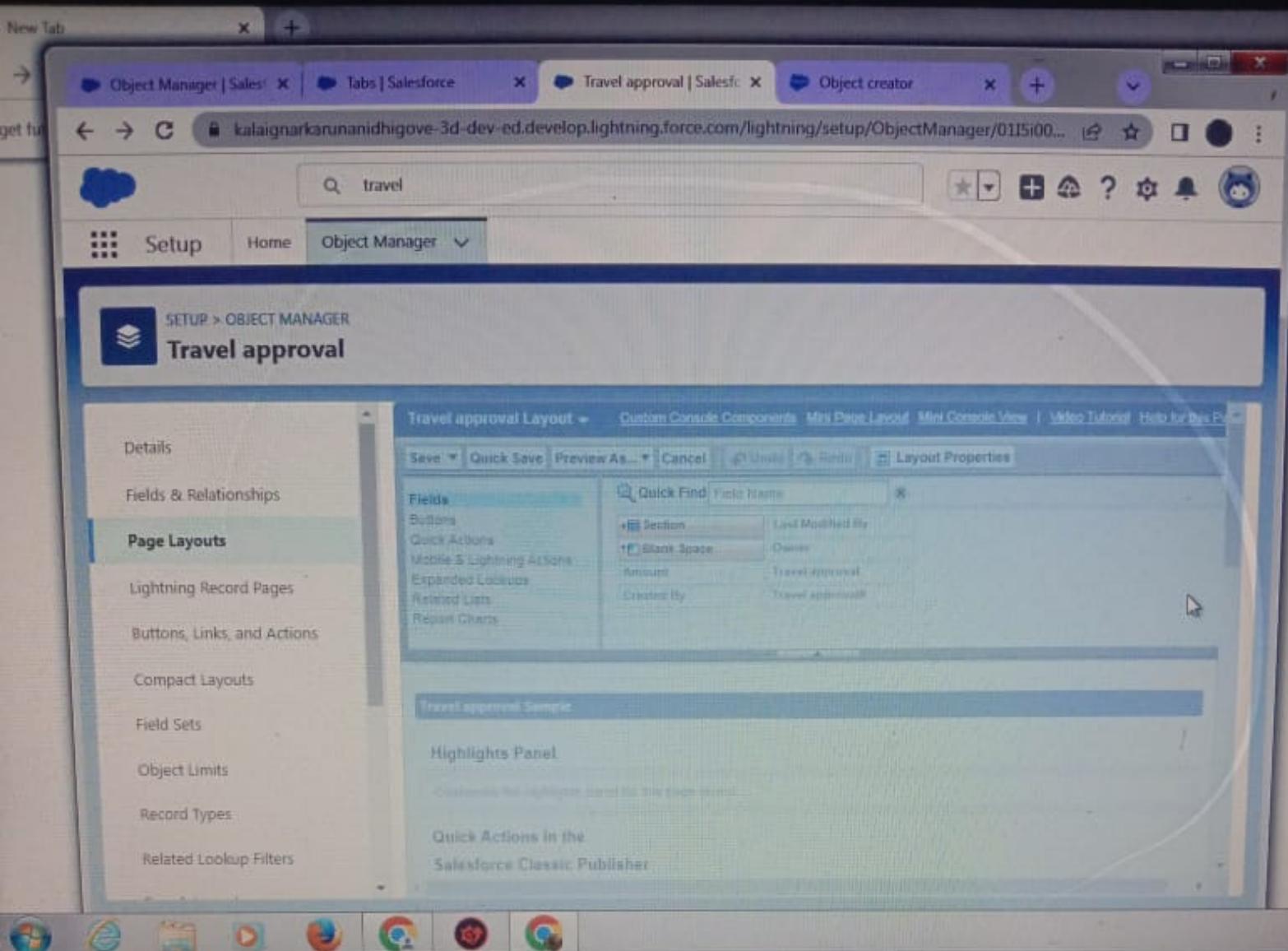
Field Name: Travel\_approval

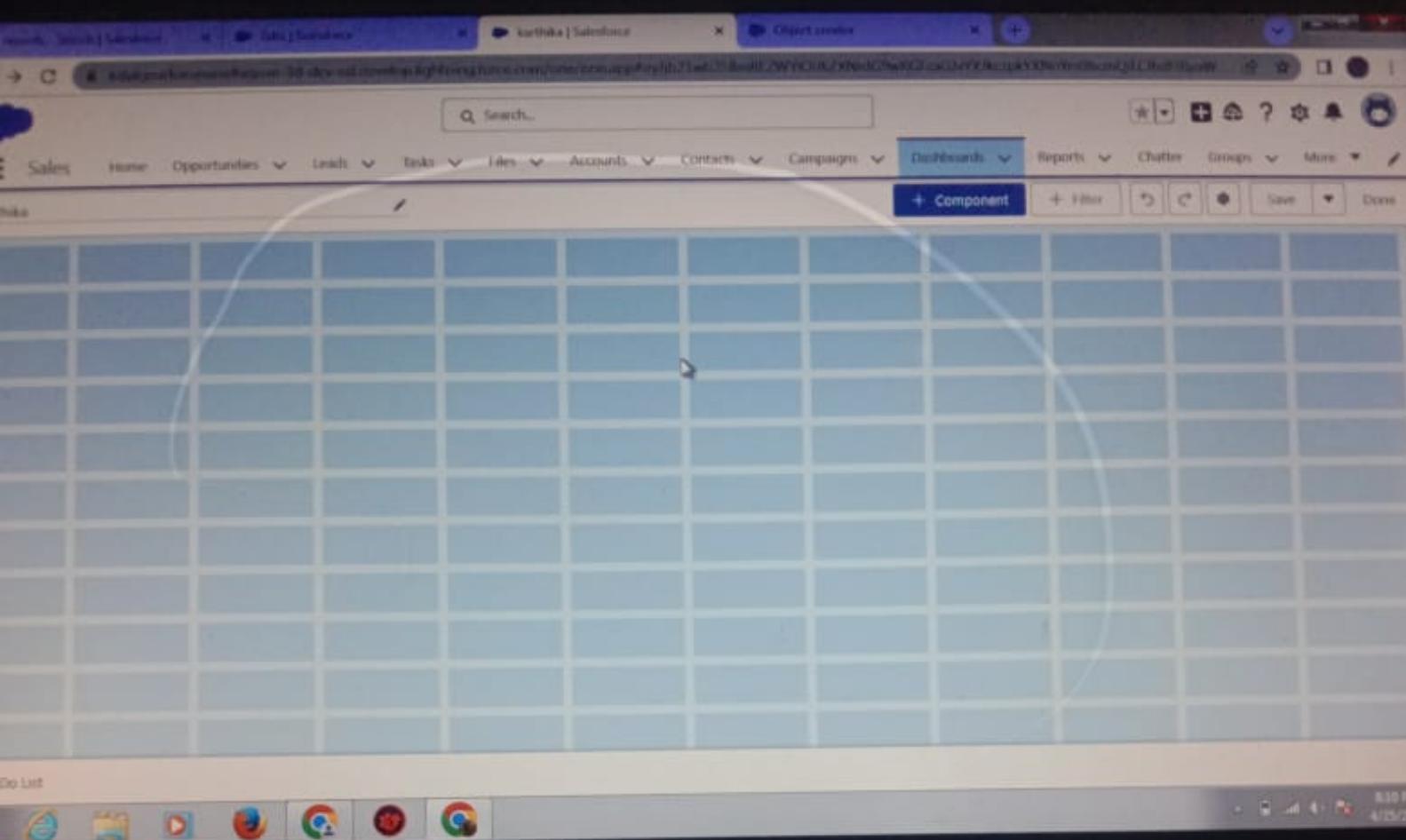
Description:

Allow Text:

Previous Next Cancel

A screenshot of a computer monitor displaying the Salesforce Object Manager interface. The main window shows the 'Travel approval' object setup. On the left, a sidebar lists various configuration tabs like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' tab is selected. In the center, a modal dialog titled 'New Custom Field' is open, showing 'Step 2: Enter the details'. The 'Field Label' input field contains 'Travel approval'. Below it, the 'Display Format' dropdown is set to 'Integer 6' and the 'Starting Number' is set to '1'. The 'Field Name' input field also contains 'Travel\_approval'. There are other optional fields like 'Description' and 'Allow Text' which are empty. At the bottom of the modal are 'Previous', 'Next', and 'Cancel' buttons.





Do List

810 P  
4/25/2

Report Builder | Salesforce

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Select a Report Type

Q user

Report Type Name	Category
Users	Standard
Library and User Report	Standard

Details

Users Standard Report Type

Start Report

Fields (117)

Identity Verification History

Login History

Profile

To Do List

Identity Verification History

Login History

Profile

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

REPORT ▾ New Users Report ▾ Users

Fields

Outline ▾ Filters 1

Groups

GROUP ROWS Add group...

Columns

Add column...

First Name Last Name Profile Username Alias Active Last Login

Previewing a limited number of records. Run the report to see everything.

	First Name	Last Name	Profile	Username	Alias	Active	Last Login
1.	karthi	ka.N	System Administrator	boomikarthikab@company.com	ka.N	<input checked="" type="checkbox"/>	25/04/2023, 7:00 pm
2.	-	Chatter Expert	Chatter Free User	chatty.00d500000cjnke5qd@mh156y1@chattersalesforce.com	Chatter	<input checked="" type="checkbox"/>	
3.	Integration	User	Analytics Cloud Integration User	integration@00d500000cjnke5.com	integ	<input checked="" type="checkbox"/>	
4.	Security	User	Analytics Cloud Security User	insightsecurity@00d500000cjnke5.com	sec	<input checked="" type="checkbox"/>	
5.	karthi	ka.N	Salesforce API Only System Integration	boomikarthikab@acme.com	ka.N	<input checked="" type="checkbox"/>	

To Do List

8:29 PM 4/25/2023

New Tab

Object Manager | Sales... Tabs | Salesforce Travel approval | Salesforce Object creator

To get full access to the features in this app, sign in to your organization.

travel

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Travel approval

VISUALforce

- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Trip-End\_c<Trip-Start-Date\_c|

Check Syntax

Error Message

Example: Discount cannot exceed 30%

This message will appear when Error Condition formula is true.

Error Message

This local message can either appear at the top of the page or before a specific field on the page.

Editor Condition Top of Page Field

ADD MONTHS  
AND  
ASCII  
ASIN

Insert Selected Function  
ABS(number)  
Returns the absolute value of a number, a number without its sign.

Help on this function

App Manager | Salesforce

New Lightning App

## App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

\* App Name: Travel approval

\* Developer Name: karthika

Description:

App Branding

Image:

Primary Color Hex: Value: #0070D2

Next

App Manager Queue Manager QueueManager Create and m... 22/04/2021, 2... Lightning ✓

AppExchange Marketplace Subscription RevenueCloud Get started 22/04/2021, 2... Lightning ✓



New Tab

Object Manager | Salesforce X New Custom Object | Salesforce +

https://kalagnikarunandhraqa:3d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

Search Setup

Context-Sensitive Help Setting

Content Name

Record Name

Open the standard Salesforce.com Help & Training window  
Open a window using a Visualforce page

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: Travel approval Name Example: Account Name

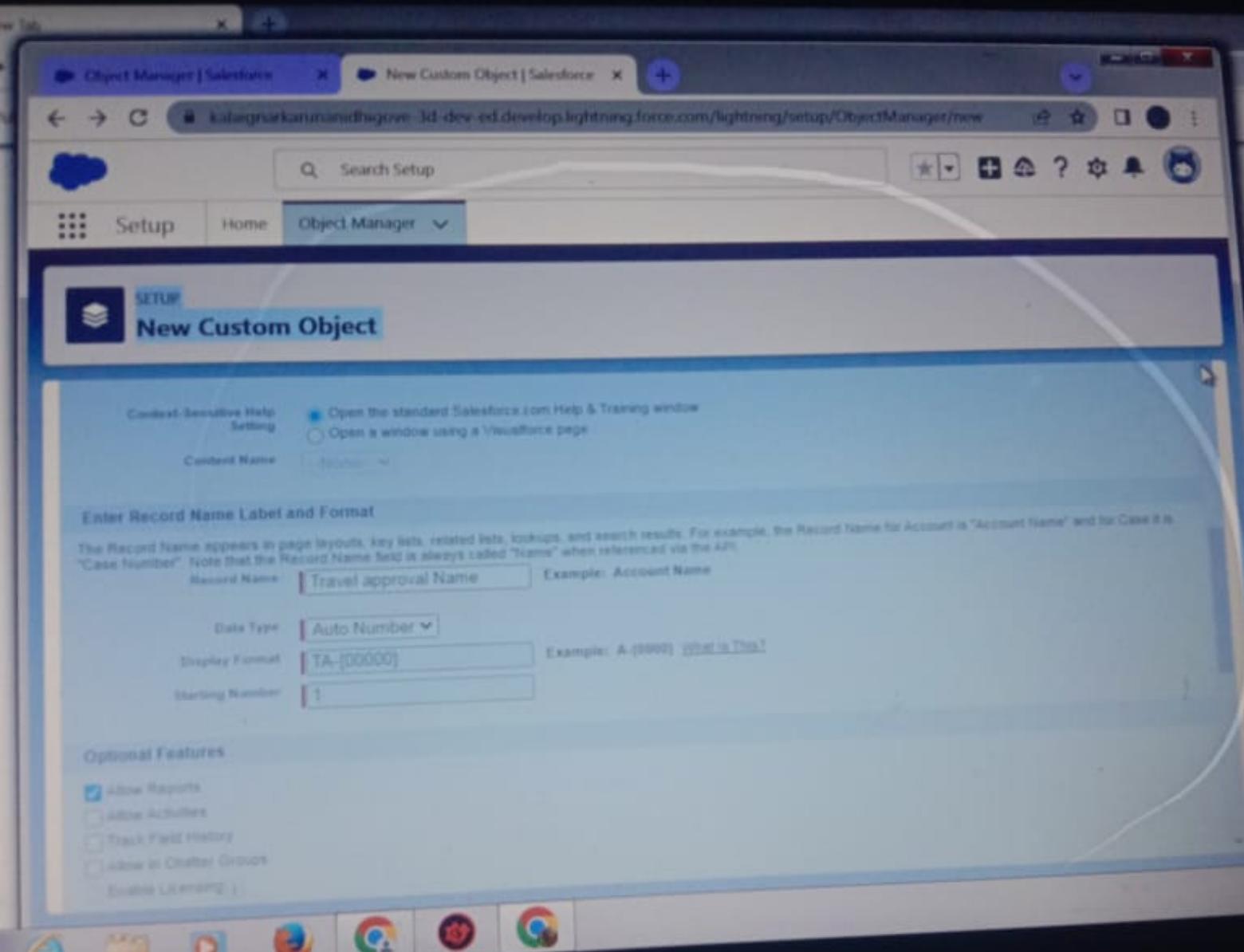
Data Type: Auto Number

Display Format: TA-[00000] Example: A-[0000] What is This?

Starting Number: 1

Optional Features

Allow Reports  
 Allow Activities  
 Track Field History  
 Allow in Chatter Groups  
 Enable Lightning



Object Manager | Salesforce    Tabs | Salesforce    Travel approval | Salesforce

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Travel approval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Field Quick Find 4 items, sorted by name, newest first

New Deleted Fields Field Dependencies Set History Tracking

Custom Field

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		
travelapproval	Name	Auto Number		



New Tab

+

Object Manager | Sales

Tabs | Salesforce

Travel approval | Sales

Object creator

+

X

To get fu

← → C [kalaignarkarunandhigove-3d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IS0000000262kL/PageLayouts/view#/](https://kalaignarkarunandhigove-3d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IS0000000262kL/PageLayouts/view#/)

Object Manager | Sales | Tabs | Salesforce | Travel approval | Sales | Object creator

travel

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Travel approval

Details Fields & Relationships Page Layouts

Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters

**Page Layouts**  
1 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME...	CREATED BY	MODIFIED BY
Travel approval Layout	karthi ka.N, 22/04/2023, 7:24 pm	karthi ka.N, 24/04/2023, 12:12 pm

Quick Find New Page Layout Assignment

Edit Delete

<https://kalaignarkarunandhigove-3d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IS0000000262kL/PageLayouts/view#/>

New Tab

App Manager | Salesforce

kalaignarkarunanidhigove-3d-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/...

Search Setup

## New Lightning App

### Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item

Utility Bar Alignment

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

Back Next

App Manager

AppExchange Marketplace

Queue Manag... QueueManag... Create and m... 22/04/2023, 2... Lightning

Subscription RevenueCloud Get started au... 22/04/2023, 2... Lightning

New Tab

Object Manager | Salesforce | Tabs | Salesforce | Object Manager | Salesforce

To get f... [Get Help](#)

kalignarkununidhigove-3d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Setup Home Object Manager

SETUP Object Manager

3 items: Sorted by Label

API NAME TYPE DESCRIPTION LAST MODIFIED DEPLOYED

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
travel approval	aprovals_c	Custom Object		22/04/2023	✓
Travel approval	Travel_approval_c	Custom Object		22/04/2023	✓
Travel approval	travelapproval_c	Custom Object		22/04/2023	✓

Schema Builder Create

This screenshot shows the Salesforce Object Manager interface. The browser tabs indicate the user is in the Object Manager section of the setup. The main page displays a list of three custom objects, all named 'travel approval' but with different API names: 'aprovals\_c', 'Travel\_approval\_c', and 'travelapproval\_c'. All three objects are of type 'Custom Object' and were last modified on 22/04/2023. Deployment status is indicated by a checkmark in the 'DEPLOYED' column for each row.

New Custom Object | Salesforce

In get to

Object Manager

Setup Home Object Manager

SETUP

## New Custom Object

New Custom Object

Permissions for this object are disabled by all profiles by default. You can enable object permissions in permission sets or by setting custom profiles. [See LDR]

Start Decline this message later

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural names are used in lists, page layouts, and reports.

Label: Travel Approval Example: Account

Plural Label: Travel Approvals Example: Accounts

Shows with parent record:

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

Object Name: Travel\_Approval Example: Account

Description:

View for this Page

Help

Feedback

Logout

→ New Job

App Manager | Salesforce

Search Setup

Setup Home Object Manager

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

- Users
- Data
- Email

PLATFORM TOOLS

- Subscription Management
- Apps
  - App Manager
  - AppExchange Marketplace

Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the Winter '23 release notes.

Enable App Cloning  Disabled

22 items • Sorted by App Type • Filtered by All appmenuitems - TabSet Type

	App Name	Developer...	Description	Last Modi...	A... ↑	Vi... ↓
1	All Tabs	AllTabSet		22/04/2023, 2...	Classic	
2	Platform	Platform	The fundamen...	22/04/2023, 2...	Classic	
3	Sales	Sales	The world's m...	22/04/2023, 2...	Classic	



DVD

