



Build An Employee Travel Approval Application For Corporates (Admin)



College:- Lakireddy Bali Reddy College of Engineering

Team ID : LTVIP2023TMID09673

Team Size : 5

Team Leader : KANDA SANTOSH

Team member : DASARI VENKAT VARUNTEJA

Team member : HINDUSTHANI KHAJA SHAREEF

Team member : MALLADI RAMESH

Team member : SHAIK MOHAMMED SADIQ

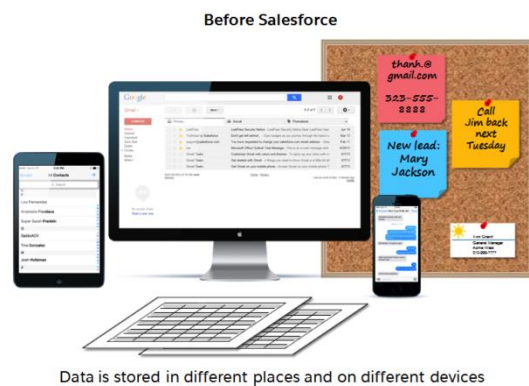
INTRODUCTION

Salesforce, Inc. Is an American cloud-based software company headquartered in San Francisco, California. It provides customer relationship management (CRM) software and applications focused on sales, customer service, marketing automation, e-commerce, analytics, and application development. Founded by former Oracle executive Marc Benioff, Salesforce quickly grew into one of the largest companies in the world, making its IPO in 2004.

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

Salesforce takes all of that important data and organizes it into a simple user interface. It's one place for you to:

- Manage all your contacts
- Work with your prospective customers
- Organize tasks and to-do items
- Focus on the right deals
- Collaborate with your team
- Showcase your big wins
- Close more business



SALESFORCE ADMINISTRATOR

A Salesforce Administrator solves business problems by customizing the Salesforce Platform. They build, configure, and automate technology solutions to deliver business value. Salesforce Administrators work with stakeholders to define system requirements and customize the platform. Most importantly, they enable users to get the most out of Salesforce technology.

A Salesforce Admin best understands how to make the platform work for their company's goals. Some organizations may employ just one admin; some employ many people in this role.

Core responsibilities include supporting users, managing data, maintaining security standards, and delivering actionable analytics. A Salesforce Administrator's colleagues can rely on them to:

Maintain the platform

Make it as easy as possible for users of any technical level to use Salesforce

Stay current on the platform's new tools, capabilities, and updates

Core skills Admins should strive to develop to be successful include:

- Product Management
- User Management
- Data Management
- Security
- Business Analysis
- Automating Processes
- Analyzing Data
- Problem-Solving
- Communication
- Learner Mindset
- Attention to Detail

PROJECT INTRODUCTION

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.

This project includes,

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

Some of the important elements used in Salesforce to implement this project are,

1. OBJECT

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

2. TAB

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

- (A) Standard Object Tabs: Standard object tabs display data related to standard objects
- (B) Custom Object Tabs: Custom object tabs displays data related to custom objects.

(C) Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.

(D) Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

3. LIGHTNING APP

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

1. Standard App: Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center, content, Salesforce Chatter, App Launcher, etc are present in it.

2. Custom Apps: Custom apps are created according to the needs of the user. Custom Apps are made by using standard and custom tabs together.

4. FIELDS AND RELATIONSHIPS

Fields - Fields store data values that are required for a particular object in a record. An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

5. USERS

A user is anyone who logs into Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

6. 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.

7. DATA IMPORT

Data Import lets you upload data from external sources and combine it with data you collect via Analytics. You can then use Analytics to organize and analyze all of your data in ways that better reflect your business.

The Data Import Wizard is a Tool that makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects.

In order to complete this milestone, you need to create a CSV file and give them the data given in the picture below. After that from these CSV files we will import data for Department & Travel Approval (Custom Object).

8. VALIDATION RULE

It can contain a formula or expression that evaluates the data in one or more fields & returns a value of true or false. Validation Rules also include an error message to display to the user when the rule returns a value true due to an invalid value/data.

9. REPORTS

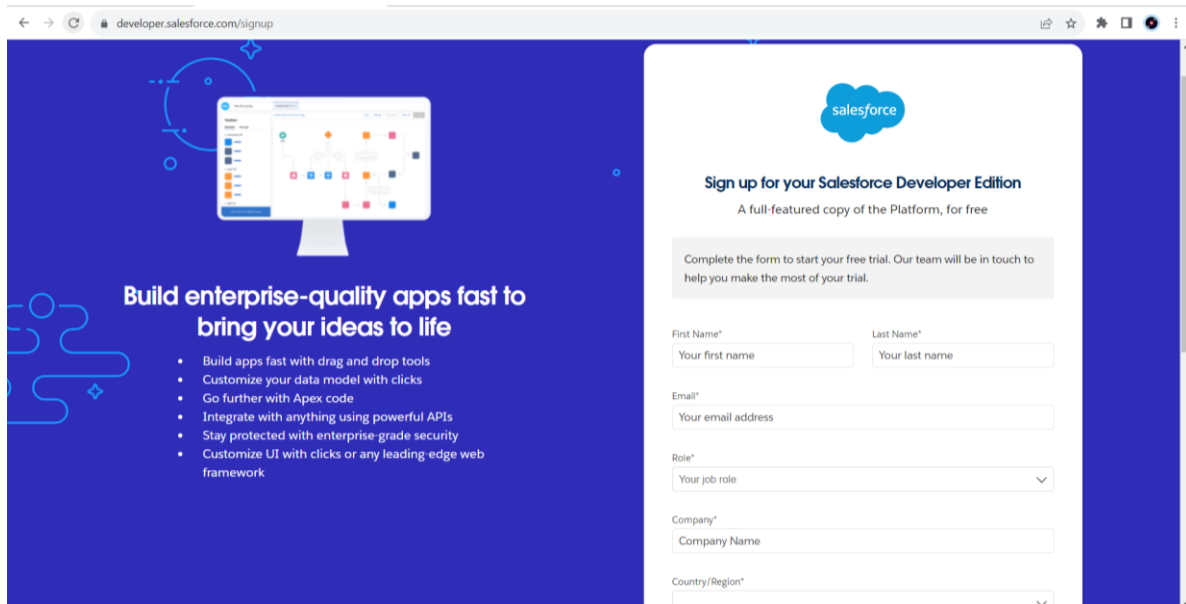
Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

10. DASHBOARDS

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

PROJECT IMPLEMENTATION

Creation of Salesforce Org and Account Activation



The screenshot shows the Salesforce Developer Edition sign-up page. On the left, a blue banner features the text "Build enterprise-quality apps fast to bring your ideas to life" and a list of benefits: "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", and "Customize UI with clicks or any leading edge web framework". On the right, a white form titled "Sign up for your Salesforce Developer Edition" asks for personal and company information. The form includes fields for First Name, Last Name, Email, Role (a dropdown menu), Company Name, and Country/Region (a dropdown menu). A "Create Account" button is at the bottom of the form.

developer.salesforce.com/signup

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

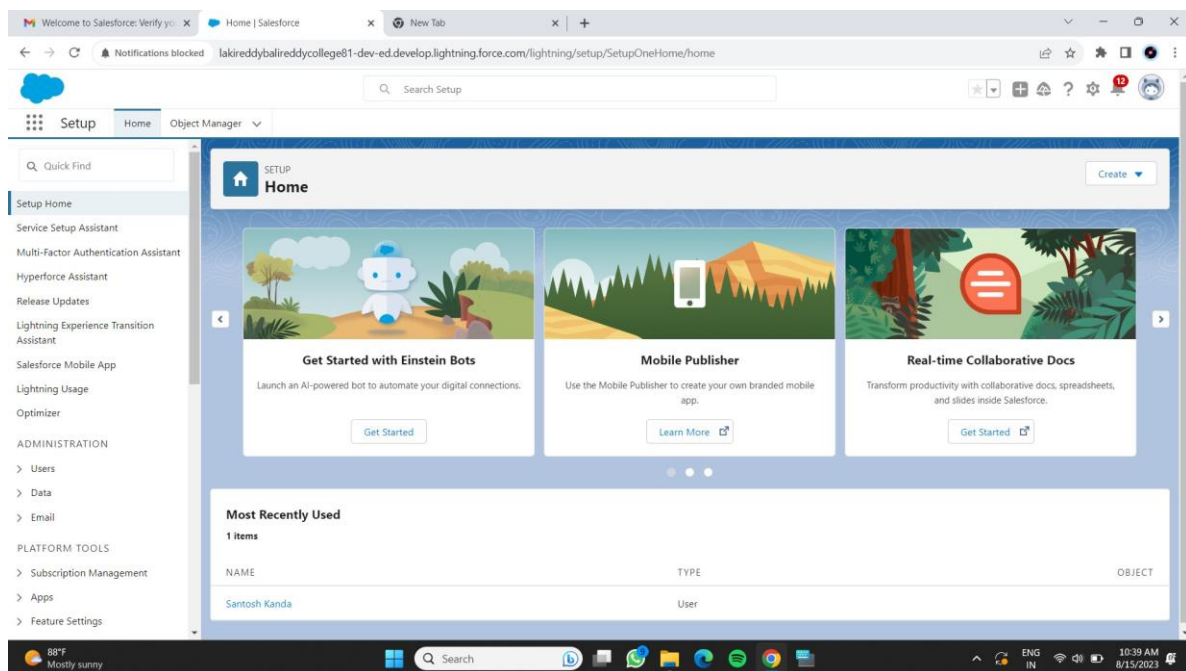
Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Country/Region*
Country/Region



The screenshot shows the Salesforce Setup page. The left sidebar contains a navigation menu with sections: "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Hyperforce Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", "Optimizer", "ADMINISTRATION" (with sub-items: Users, Data, Email), "PLATFORM TOOLS" (with sub-items: Subscription Management, Apps, Feature Settings), and "Quick Find". The main content area is titled "SETUP Home" and features three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Below these cards is a "Most Recently Used" section with a table listing recent items.

Welcome to Salesforce: Verify your identity

Home | Salesforce

Notifications blocked

lakireddybalireddycollege81-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Setup Home

Quick Find

Service Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Subscription Management
- > Apps
- > Feature Settings

SETUP Home

Create

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

1 items

NAME	TYPE	OBJECT
Santosh Kanda	User	

88°F Mostly sunny

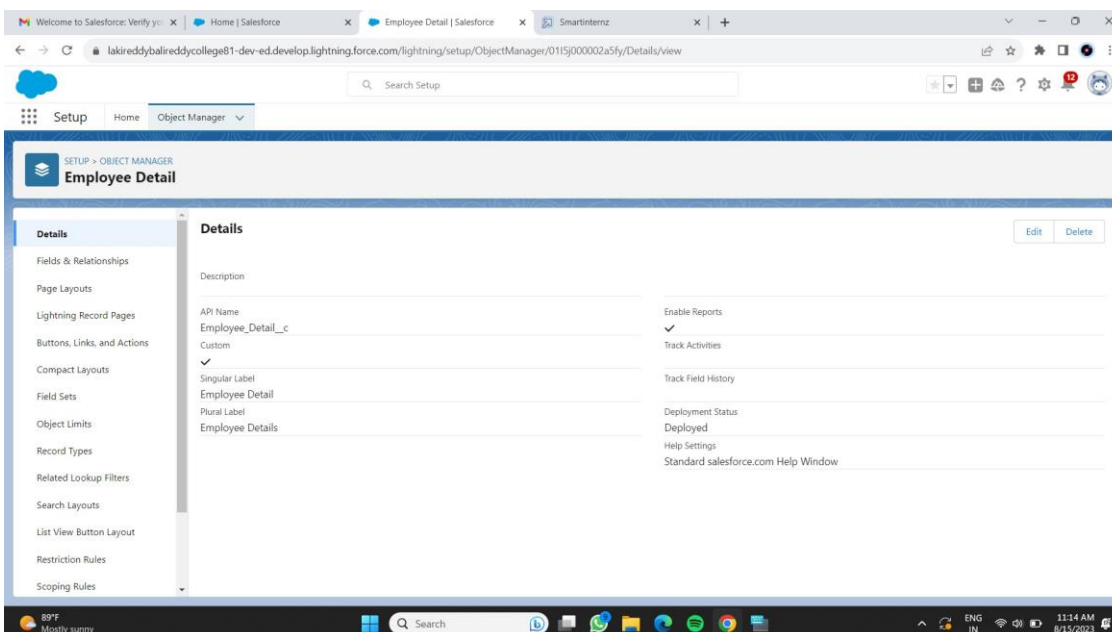
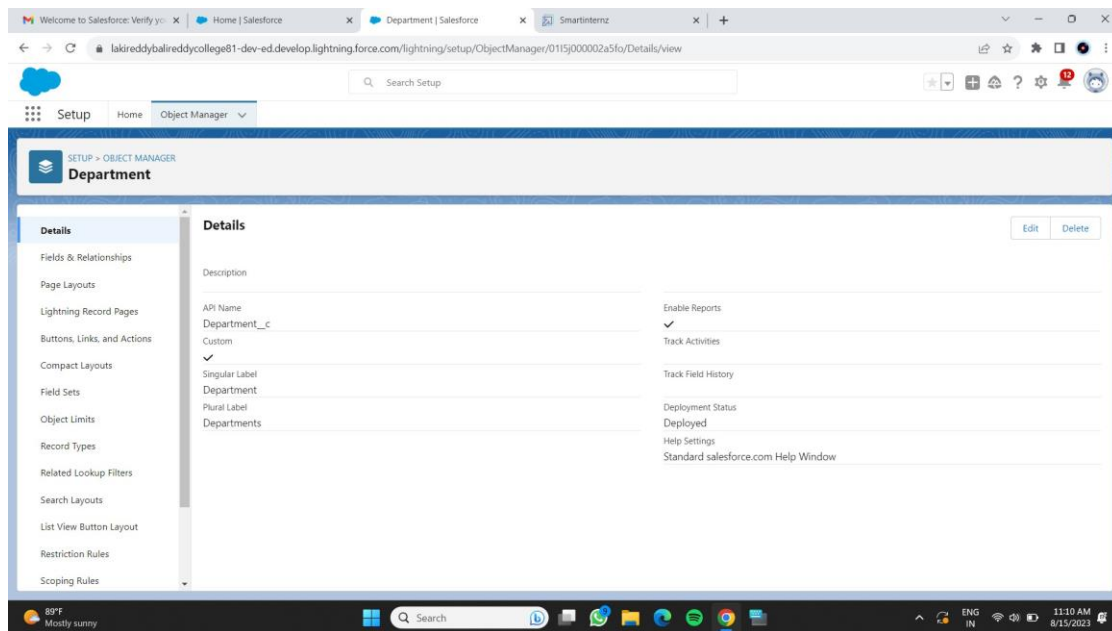
Search

ENG IN

10:39 AM 8/15/2023

Creation of Custom Objects

For this Travel Approval we need to create 5 objects **Department, Employee Detail, Expense, Expense Items, and Travel Approval.**



← → ↻ lakireddybalireddycollege81-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002a5kQ/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Expense

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
List View Button Layout
Restriction Rules
Scoping Rules

Details

Description

API Name
Expense__c
Custom
✓
Singular Label
Expense
Plural Label
Expenses

Enable Reports
✓
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

89°F Mostly sunny 11:21 AM 8/15/2023

← → ↻ lakireddybalireddycollege81-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002a5ka/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Expense Item

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
List View Button Layout
Restriction Rules
Scoping Rules

Details

Description

API Name
Expense_Item__c
Custom
✓
Singular Label
Expense Item
Plural Label
Expense Items

Enable Reports
✓
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

89°F Mostly sunny 11:23 AM 8/15/2023

← → ↻ lakireddybalireddycollege81-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002a5kp/Details/View

Setup Home 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

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Details

Description

API Name
Travel_Approval__c

Custom

✓

Singular Label
Travel Approval

Plural Label
Travel Approvals

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

89°F Mostly sunny

Search

ENG IN 11:24 AM 8/15/2023

← → ↻ lakireddybalireddycollege81-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

50+ Items. Sorted by Last Modified

Quick Find Schema Builder Create

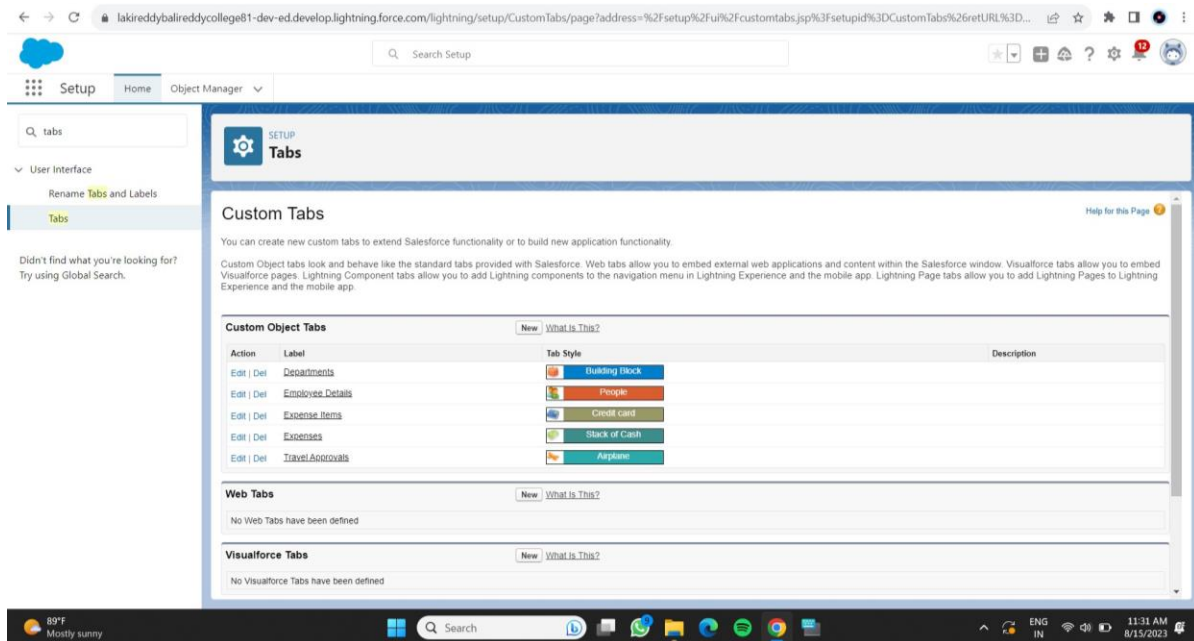
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Travel Approval	Travel_Approval__c	Custom Object		15/08/2023	✓
Expense Item	Expense_Item__c	Custom Object		15/08/2023	✓
Expense	Expense__c	Custom Object		15/08/2023	✓
Employee Detail	Employee_Detail__c	Custom Object		15/08/2023	✓
Department	Department__c	Custom Object		15/08/2023	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			
Work Step	WorkStep	Standard Object			
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object			
Work Plan Template	WorkPlanTemplate	Standard Object			

89°F Mostly sunny

Search

ENG IN 11:25 AM 8/15/2023

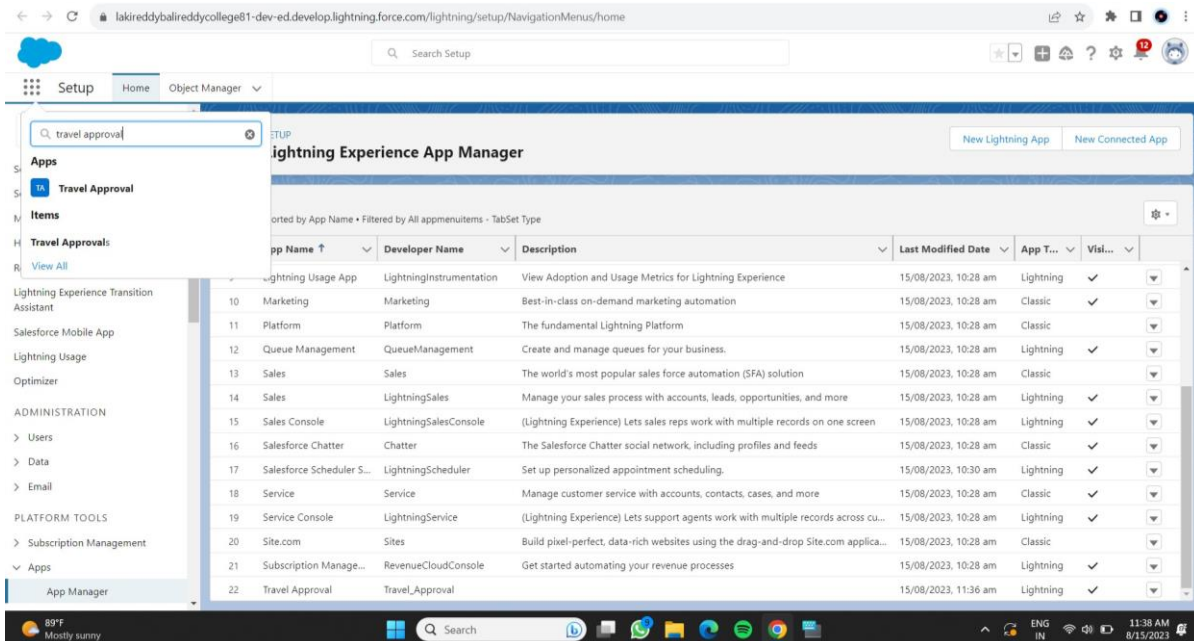
Creation of Custom Tabs



The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar has a search bar with "tabs" entered and a list of navigation items including "User Interface" and "Rename Tabs and Labels". The main content area is titled "Custom Tabs" and includes a "Help for this Page" link. Below the title, there is a descriptive paragraph about custom tabs. The page is divided into three sections: "Custom Object Tabs", "Web Tabs", and "Visualforce Tabs". Each section has a "New" button and a "What is This?" link. The "Custom Object Tabs" section contains a table with columns for Action, Label, Tab Style, and Description. The table lists several tabs: Departments (Building Block), Employee Details (People), Expense Items (Credit Card), Expenses (Stack of Cash), and Travel Approvals (Approval).

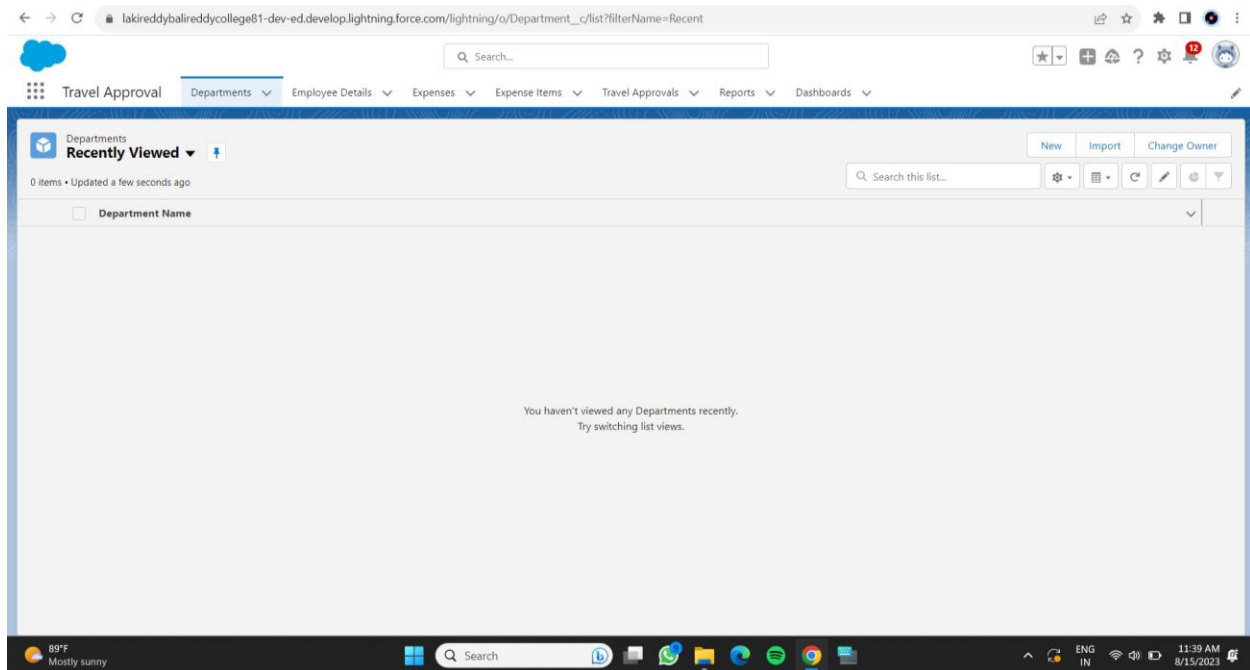
Action	Label	Tab Style	Description
Edit Del	Departments	Building Block	
Edit Del	Employee Details	People	
Edit Del	Expense Items	Credit Card	
Edit Del	Expenses	Stack of Cash	
Edit Del	Travel Approvals	Approval	

Creation of Travel Approval App (Lightning App)



The screenshot shows the Salesforce Setup interface for the Lightning Experience App Manager. The left sidebar has a search bar with "travel approval" entered and a list of navigation items including "Apps" and "Items". The main content area is titled "Lightning Experience App Manager" and includes a "New Lightning App" button and a "New Connected App" button. Below the title, there is a descriptive paragraph about the app manager. The page is divided into two sections: "App Name" and "Developer Name". Each section has a "New" button and a "What is This?" link. The "App Name" section contains a table with columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The table lists several apps: Lightning Usage App, Marketing, Platform, Queue Management, Sales, LightningSales, LightningSalesConsole, Salesforce Chatter, LightningScheduler, Service, LightningService, Site.com, Subscription Management, and Travel Approval.

App Name	Developer Name	Description	Last Modified Date	App Type	Visibility
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	15/08/2023, 10:28 am	Lightning	✓
10 Marketing	Marketing	Best-in-class on-demand marketing automation	15/08/2023, 10:28 am	Classic	✓
11 Platform	Platform	The fundamental Lightning Platform	15/08/2023, 10:28 am	Classic	✓
12 Queue Management	QueueManagement	Create and manage queues for your business.	15/08/2023, 10:28 am	Lightning	✓
13 Sales	Sales	The world's most popular sales force automation (SFA) solution	15/08/2023, 10:28 am	Classic	✓
14 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	15/08/2023, 10:28 am	Lightning	✓
15 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	15/08/2023, 10:28 am	Lightning	✓
16 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	15/08/2023, 10:28 am	Classic	✓
17 Salesforce Scheduler S...	LightningScheduler	Set up personalized appointment scheduling.	15/08/2023, 10:30 am	Lightning	✓
18 Service	Service	Manage customer service with accounts, contacts, cases, and more	15/08/2023, 10:28 am	Classic	✓
19 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across cu...	15/08/2023, 10:28 am	Lightning	✓
20 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com applica...	15/08/2023, 10:28 am	Classic	✓
21 Subscription Manage...	RevenueCloudConsole	Get started automating your revenue processes	15/08/2023, 10:28 am	Lightning	✓
22 Travel Approval	Travel_Approval		15/08/2023, 11:36 am	Lightning	✓



Creation of Fields

Object Name	Field Name	Data Type
Department	Department Code	Text (Length - 5)
	District	Text (Length - 40)
	State	Text (Length - 40)
	School Website	URL
Employee Detail	Date of Birth	Date
	Gender	Picklist (Male, Female)
	Department	Lookup (Department)
Expense	Employee	Lookup (Employee Detail)
	Total Item	Rollup summary (Expense-Item)
Expense Item	Expense	Master Detail (Expense)
	Expense Type	Pick List (Values are - Transport, Hotel, Meal, Others)

	Amount	Currency
Travel Approval	Employee Name Department Destination State Purpose of Trip Trip Start Date Trip End Date Status	Lookup (Employee Detail) Lookup (Department) Text (Length – 40) Text (Length – 256) Date Date Picklist (Values are - Approved, Rejected)

← → ↻ 🔒 lakireddybalireddycollege81-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002a5fo/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Department

Details

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department Code	Department_Code__c	Text(5)		
Department Name	Name	Text(80)		✓
District	District__c	Text(40)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
School website	School_website__c	URL(255)		
State	State__c	Text(40)		

90°F Hot weather

Search

ENG IN 11:46 AM 8/15/2023

← → ↻ 🔒 lakireddybalireddycollege81-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002a5fy/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Employee Detail

Details

Fields & Relationships
8 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date of Birth	Date_of_Birth__c	Date		
Department	Department__c	Lookup(Department)		✓
Employee Id	Employee_Id__c	Text(12)		
Employee Name	Name	Text(80)		✓
Gender	Gender__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

90°F Mostly sunny 11:57 AM 8/15/2023

← → ↻ 🔒 lakireddybalireddycollege81-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002a5ka/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Expense Item

Details

Fields & Relationships
6 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
Created By	CreatedById	Lookup(User)		
Expense	Expense__c	Master-Detail(Expense)		✓
Expense Item Name	Name	Text(80)		✓
Expense Type	Expense_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		

92°F Sunny 12:20 PM 8/15/2023

← → ↻ lakireddybalireddycollege81-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002a5kQ/FieldsAndRelationships/view

Setup Home Object Manager

Expense

Details

Fields & Relationships 6 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee	Employee__c	Lookup(Employee Detail)		✓
Expense Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓
Total Item	Total_Item__c	Roll-Up Summary (SUM Expense Item)		

92°F Sunny 12:28 PM 8/15/2023

← → ↻ lakireddybalireddycollege81-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002a5kp/FieldsAndRelationships/view

Setup Home Object Manager

Travel Approval

Details

Fields & Relationships 11 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

Department	Department__c	Lookup(Department)		✓
Destination state	Destination_state__c	Text(40)		
Employee Name	Employee_Name__c	Lookup(Employee Detail)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓
Purpose of trip	Purpose_of_trip__c	Text(255)		
Status	Status__c	Picklist		
Travel Approval Name	Name	Text(80)		✓
Trip End date	Trip_End_date__c	Date		
Trip start date	Trip_start_date__c	Date		

92°F Sunny 1:05 PM 8/15/2023

Data Import

The screenshot shows the 'Edit mapping' step of the Salesforce Data Import Wizard. A progress bar at the top indicates the current step is 'Almost done'. Below the progress bar, there are three tabs: 'Choose data', 'Edit mapping', and 'Start import'. The 'Edit mapping' tab is active, displaying a table with columns: 'Edit', 'Mapped Salesforce Object', 'CSV Header', and 'Example'. The table contains two rows of data for 'Department Name' and 'Department Code'. At the bottom right, there are 'Cancel', 'Previous', and 'Next' buttons.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Department Name	Department Name	Audit Services	Contract Management	Division of Finance
Change	Department Code	Department Code	405-01	405-02	405-03

The screenshot shows the 'Review & Start Import' step of the Salesforce Data Import Wizard. A progress bar at the top indicates the current step is 'Great job!'. Below the progress bar, there are three tabs: 'Choose data', 'Edit mapping', and 'Start import'. The 'Start import' tab is active, displaying the 'Review & Start Import' section. This section includes a summary of the import: 'Your selections' (Departments, Add new records, Departments.csv), 'Your import will include: 2 Mapped fields', and 'Your import will not include: 0 Unmapped fields'. At the bottom right, there are 'Cancel', 'Previous', and 'Start Import' buttons.

Review & Start Import

Review your import information and click Start Import.

Your selections:

- Departments ✓
- Add new records ✓
- Departments.csv ✓

Your import will include:

Mapped fields: 2

Your import will not include:

Unmapped fields: 0

Welcome to Salesforce: Verify your identity | Home | Salesforce | Smartinternz | New Tab

lakireddybalireddycollege81-dev-ed.develop.lightning.force.com/lightning/setup/AsyncApiJobStatus/page?address=%2F7505J00000G7KeLAAV

Setup | Home | Object Manager

data import

Integrations

Data Import Wizard

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

Bulk Data Load Jobs

Bulk Data Load Job: 7505J00000G7KeL

View the details of a bulk data load job.

Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail				Reload	
Job ID	7505J00000G7KeL	Job Type	Bulk V1	Status	Closed
Submitted By	Santosh Kanda	Operation	Insert	Total Processing Time (ms)	65
Start Time	15/08/2023, 2:41 pm IST	Queued Batches	0	API Active Processing Time (ms)	4
End Time	15/08/2023, 2:41 pm IST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete [hh:mm:ss]	00:00	Completed Batches	1		
Object	Department	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	16		
Concurrency Mode	Parallel	Records Failed	16		
API Version	58.0	Retries	0		

93°F Mostly sunny

Search

ENG IN 2:41 PM 8/15/2023

Creation of User

Inbox (58) - santoshkanda022@ | Smartinternz | Users | Salesforce | New Tab

lakireddybalireddycollege81-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005J000009FNit%3FnoRedirect%3D1%26isUserEntityOverride%3D1

Setup | Home | Object Manager

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.

Users

User: Travel Approval manager

Permission Set Assignments | Permission Set Assignments: Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Membership | Queue Membership | Team | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail		Role
Name	Travel Approval manager	User License
Alias	trana	Profile
Email	santoshkanda022@gmail.com [Verify]	Standard User
Username	tamanagar@travelapp12.com	Active
Nickname	User16920912199908725079	Marketing User
Title		Offline User
Company		Knowledge User
Department		Flow User
Division		Service Cloud User
Address		Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver		Data.com User Type
Manager		Accessibility Mode (Classic Only)
Receive Approval Request Emails	Only if I am an approver	Debug Mode
Federation ID		High-Contrast Palette on Charts
App Registration: One-Time Password		Load Lightning Pages While Scrolling

javascript:srcUp(%2F%2F005J000009FNit%3FnoRedirect%3D1%26isUserEntityOverride%3D1%26isDp1%27);

92°F Mostly sunny

Search

ENG IN 3:11 PM 8/15/2023

Customization of Travel Approval Object Page Layout

The screenshot shows the Salesforce Object Manager interface for the 'Travel Approval' object. The 'Page Layouts' section is active, displaying a list of fields and their current placement in the layout. The fields include: Destination state, Purpose of trip, Trip start date, Employee Name, Status, Travel Approval Name, and Trip End date. The layout is being customized to include these fields in a specific order and format. The interface includes a sidebar with navigation options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The top navigation bar shows 'Setup', 'Home', and 'Object Manager'. The bottom status bar displays the temperature (92°F), weather (Mostly sunny), and system time (3:10 PM, 8/15/2023).

Add Business Logic to Travel App

Creation of Validation Rule

The screenshot shows the Salesforce Object Manager interface for the 'Travel Approval' object, specifically the 'Validation Rule' section. The validation rule is named 'Date Validation' and is active. The error condition formula is 'Trip_End_date__c < Trip_start_date__c'. The error message is 'Trip end date must be the date greater than the Trip start date'. The error location is 'Trip End date'. The rule was created by Santosh Kanda on 15/08/2023 at 3:21 pm. The interface includes a sidebar with navigation options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The top navigation bar shows 'Setup', 'Home', and 'Object Manager'. The bottom status bar displays the temperature (89°F), weather (Sunny), and system time (3:21 PM, 8/15/2023).

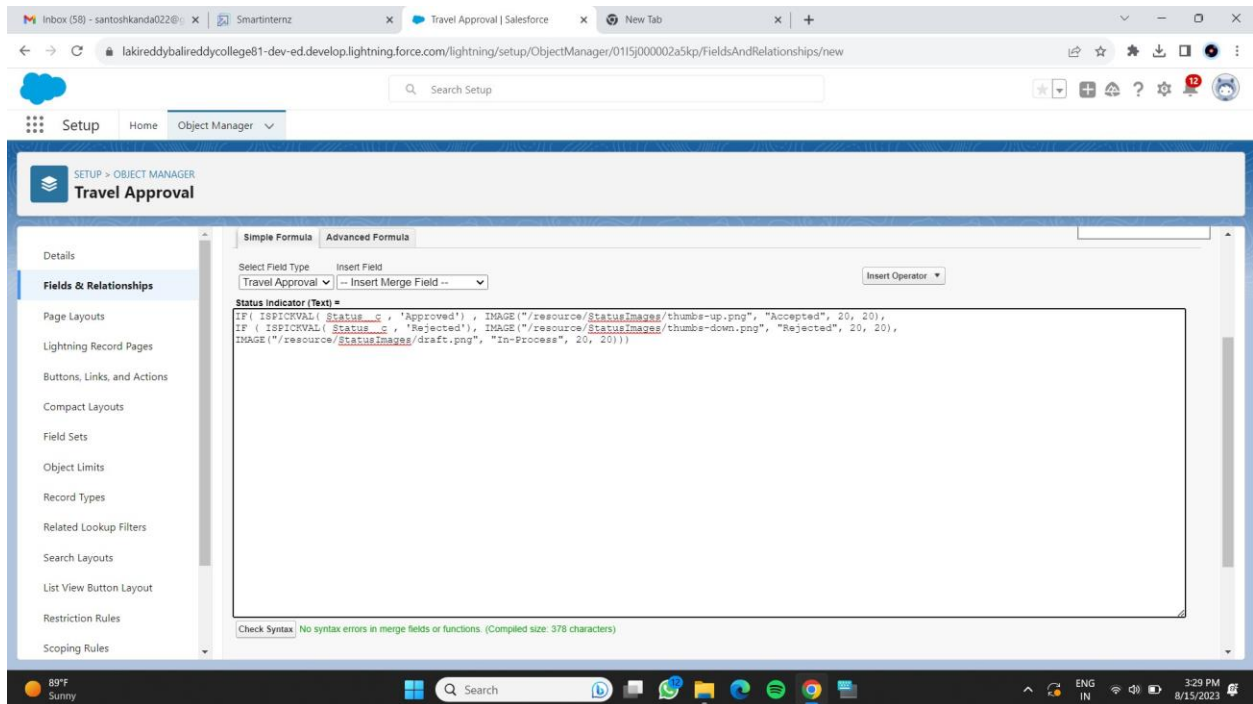
Creation of Formulae Fields

Formula:-

IF(ISPICKVAL(Status__c , 'Approved') , IMAGE("/resource/StatusImages/thumbs-up.png",
"Accepted", 20, 20),

IF (ISPICKVAL(Status__c , 'Rejected'), IMAGE("/resource/StatusImages/thumbs-down.png",
"Rejected", 20, 20),

IMAGE("/resource/StatusImages/draft.png", "In-Process", 20, 20)))



The screenshot shows the Salesforce Setup interface for the 'Travel Approval' object. The 'Status Indicator' custom field is being defined. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area shows the 'Custom Field Definition Detail' for the 'Status Indicator' field.

Field Information

Field Label	Status Indicator	Object Name	Travel Approval
Field Name	Status_Indicator		
API Name	Status_Indicator__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Santosh Kanda	15/06/2023, 3:29 pm	
Modified By	Santosh Kanda	15/06/2023, 3:29 pm	

Formula Options

Data Type	Formula
Text	IF (ISPICKVAL(Status__c, "Approved"), IMAGE("/resource/Statusimages/thumbs-up.png", "Accepted", 20, 20), IF (ISPICKVAL(Status__c, "Rejected"), IMAGE("/resource/Statusimages/thumbs-down.png", "Rejected", 20, 20), IMAGE("/resource/Statusimages/draft.png", "In-Process", 20, 20)))

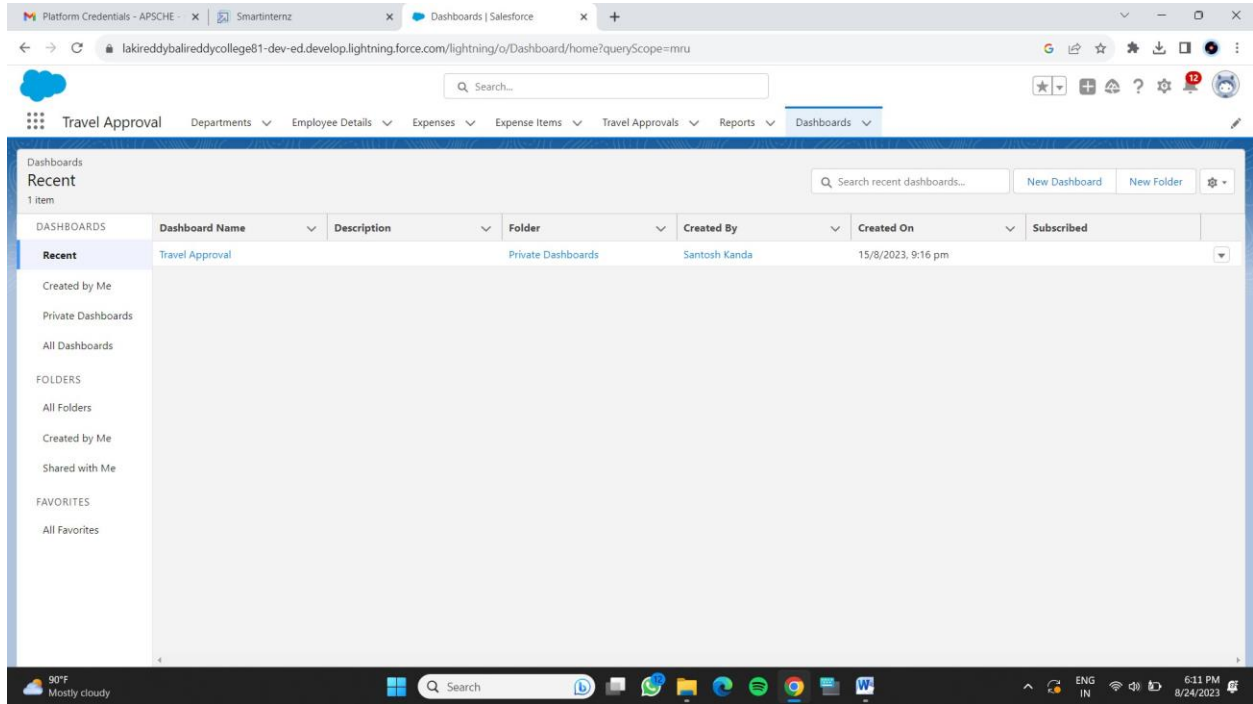
Creation of Report

The screenshot shows the Salesforce Reports interface. The 'Recent' report is listed. The left sidebar shows navigation options like Reports, Folders, Favorites, etc. The main content area displays a table of recent reports.

Recent Reports

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Travel Approval Report		Private Reports	Santosh Kanda	15/8/2023, 9:13 pm	

Creation of Dashboard



ADVANTAGES

- The process is tedious and time-consuming task.
- Easiest way.
- Saves time for both employees and managers.
- Reduces the workload.
- The entire process is digitized and streamlined.
- Increased Transparency.
- Provides greater control and security over employee travel.

DISADVANTAGES

- The process includes too many levels of approval that makes confusing.
- Regular Maintenance.
- Internet Connection problem is there.
- Poor Connection leads to trouble and anxiety.
- Lack of leadership.
- It can be costly sometimes.
- Poor communication.

APPLICATIONS

The application ensures that travel requests comply with the company's travel policies which reduces the risk of non-complaint expenses and unnecessary travel. The application helps reduce travel costs by allowing the company to track expenses and stay within budget. This also helps the company negotiate better deals with travel vendors. The application saves time for both the employee and the travel manager by automating the travel request and approval process. This allows the HR department and travel managers to focus on more strategic tasks.

CONCLUSION

In this project, we built an Employee Travel Approval Application. An Employee Travel Approval Application is valuable tool for corporate travel management. It streamlines the travel request and approval process ensures policy compliance and provides transparency to all parties involved. A well designed application can save time and money, making it an essential tool for corporate that frequently travel for business.

FUTURE SCOPE

- In future it will be really a useful one in the application of travel approval.
- It is trusted to be in future everyone will utilize this.
- The customer will set good service and make it trustworthy.
- Hope it would fulfil all the needs of the users.