

1 INTRODUCTION

1.1 Overview

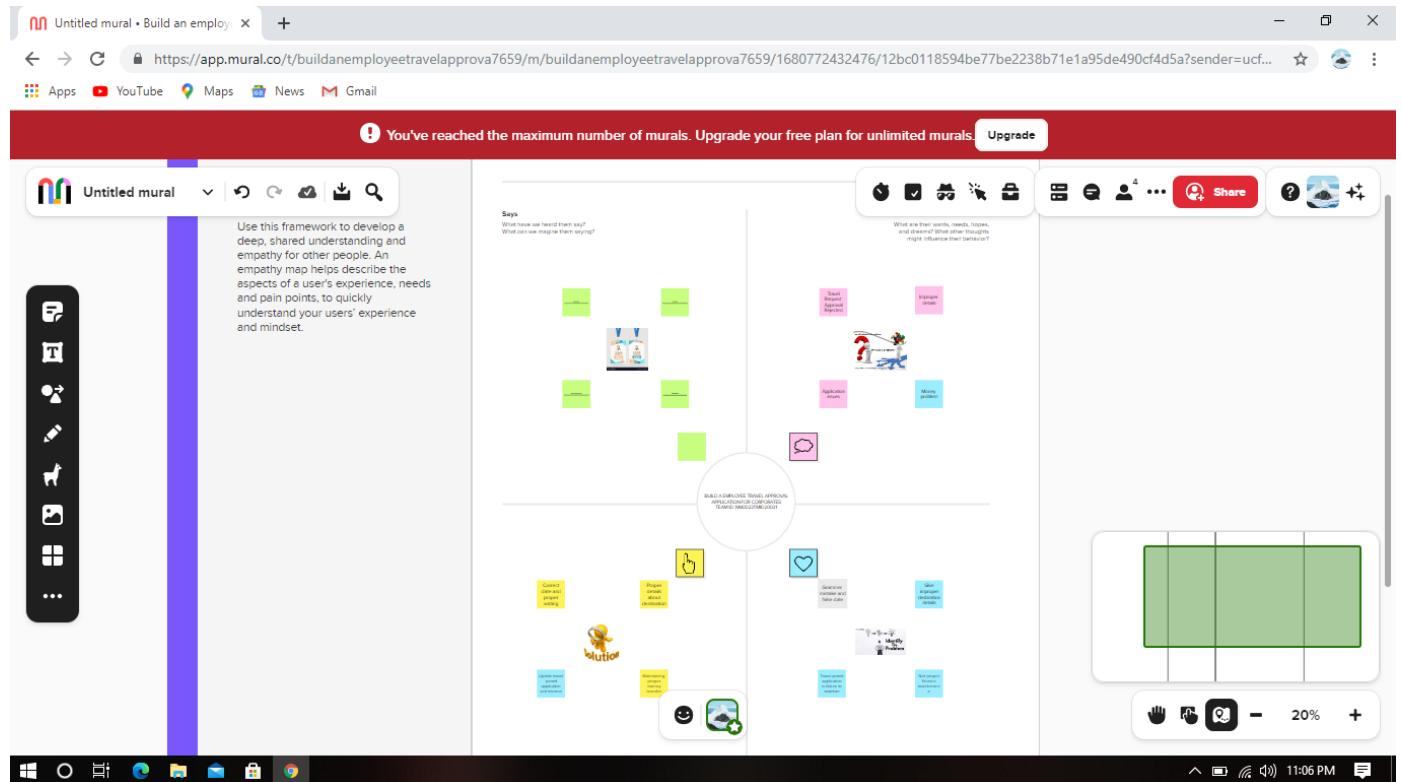
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project they will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

1.2 Purpose

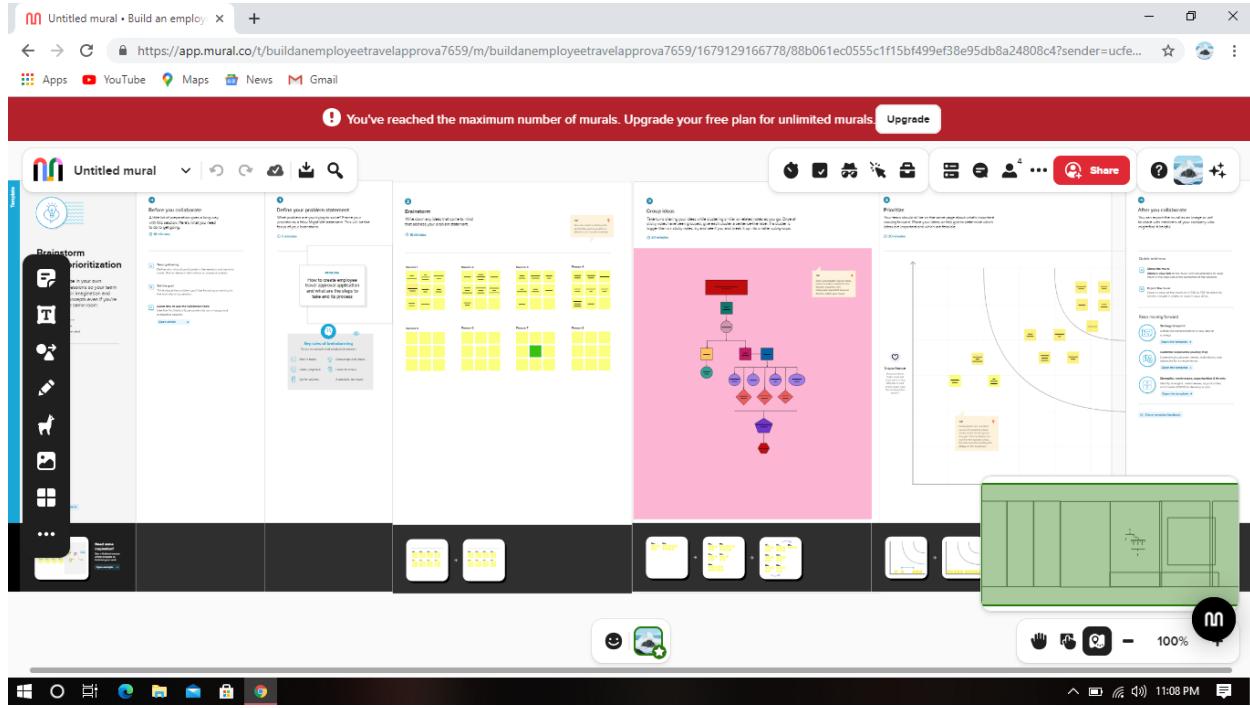
1. Real Time Salesforce Project
2. Object & Relationship in Salesforce

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model:

Object name	Fields in the Object							
Travel Approvals	<table border="1"> <thead> <tr> <th>Field label</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>Amount</td><td>Currency</td></tr> <tr> <td>Travel Approval</td><td>Master-Detail relationship</td></tr> </tbody> </table>		Field label	Data type	Amount	Currency	Travel Approval	Master-Detail relationship
Field label	Data type							
Amount	Currency							
Travel Approval	Master-Detail relationship							
Expense Item	<table border="1"> <thead> <tr> <th>Field label</th><th>Data type</th></tr> </thead> <tbody> <tr> <td>Expense</td><td>Picklist</td></tr> </tbody> </table>	Field label	Data type	Expense	Picklist			
Field label	Data type							
Expense	Picklist							

3.2 Activity & Screenshot

Untitled mural • Build an employ Personal Information | Salesforce

https://govtartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/settings/personal/PersonalInformation/home

Cloud Home Object Manager

Search Setup

Personal Information

Details

First Name: TSuresh
Last Name: Thirupathi
Alias: TThir
Email: sureshthirupathi40@gmail.com
Username: sureshthirupathi40@gmail.com
Nickname: User167887154756446733
Phone:
Extension:
Fax:
Mobile: +91 8248494651

Address

Street:
City:
State/Province:
Zip/Postal Code:

Help for this page

Required fields

Personal Information

Advanced User Details
Approver Settings
Authentication Settings for External Systems
Change My Password
Connections
External Credentials
Grant Account Login Access
Language & Time Zone
Login History
Personal Information
Reset My Security Token
Security Central
Display & Layout
Email
Chatter

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https://govtartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/settings/personal/PersonalInformation/home

Cloud Home Object Manager

Search Setup

Personal Information

Address

Street:
City:
State/Province:
Zip/Postal Code:
Country: IN

My Work Information

Company Name: Govt Arts College for Men.
Title:
Department:
Division:
Employee Number:
Start of Day: 6:00 am
End of Day: 11:00 pm

Save Cancel

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Privacy Statement | Terms of Use

Personal Information

Advanced User Details
Approver Settings
Authentication Settings for External Systems
Change My Password
Connections
External Credentials
Grant Account Login Access
Language & Time Zone
Login History
Personal Information
Reset My Security Token
Security Central
Display & Layout
Email
Chatter

10:21

51.0 4G+ KB/S



Welcome to Salesforce: Verify your account



Inbox

D

developer@salesf... Mar 15

to me ▾



salesforce

Thanks for signing up with Salesforce!



Click below to verify your account.

[Verify Account](#)

To easily log in later, save this URL:
<https://govtartscollegeformenkrish4-dev-ed.develop.my.salesforce.com>

Username:
sureshthirupathi40@gmail.com

Again, welcome to Salesforce!

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Salesforce.com, inc. The Landmark at One Market, Suite 300, San Francisco, CA, 94105, United States

Reply

Reply all

Forward





The screenshot shows the Salesforce Lightning Experience homepage. At the top, there's a banner with the text "It's Better in Lightning" and "Move to Lightning Experience and get..." followed by a "Getting Started" section. This section includes a "Build App" card (with a "Add App" button) and a "Salesforce Lightning" card (with a "Get Started" button). Below this is a "Recent Items" table:

Name	Type	Object
Expense Item	Custom Field Definition	Expense Item
Travel Approval	Custom Field Definition	Expense Item
Amount	Custom Field Definition	Expense Item
Expense	Custom Field Definition	Expense Item
Report Item	Custom Field Definition	Travel Approval
Status Indicator	Custom Field Definition	Travel Approval
Status	Custom Field Definition	Travel Approval
Total Expense	Custom Field Definition	Travel Approval
Expense Item	Custom Field Definition	Travel Approval
Department Field	Custom Field Definition	Travel Approval

Below the recent items is a "Quick Links" section with categories like Tools, Data, Security, and Community. The Community section includes links for Resources, Ask Answers, Contribute Ideas, User Groups, and Release Resources. At the bottom of the page, there's a copyright notice: "Copyright © 2006-2023 Salesforce.com, Inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | ADA Compliance".

Untitled mural • Build an employe... Home | Salesforce

https://govtartscollegeformenkrish4-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Cloud 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 > Apps App Manager

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 10 items

NAME TYPE

https://govtartscollegeformenkrish4-dev-ed.develop.lightning/settings/personal/PersonalInformation/home

This screenshot shows the Salesforce Setup Home page. It features a sidebar with navigation links for 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), and Platform Tools (Subscription Management, Apps). The main content area displays three cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections), 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app), and 'Real-time Collaborative Docs' (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). Below these cards is a section titled 'Most Recently Used' showing 10 items.

Login | Salesforce

https://govtartscollegeformenkrish4-dev-ed.develop.my.salesforce.com/?ec=302&startURL=%2Fvisualforce%2Fsession%3Furl%253A%252F%252Fgovtartscollege...

Apps YouTube Maps News Gmail

To access this page, you have to log in to Salesforce.

Username

Password

Log In

Remember me

[Forgot Your Password?](#)

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 -30 F

Service Jay Sharma Loyalty Member

A special gift from NTO 20

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This screenshot shows the Salesforce login page. It includes a login form with fields for Username (jureshthirupathi40@gmail.com) and Password, and buttons for Log In, Remember me, and Forgot Your Password?. To the right of the login form is a large promotional banner for the Customer Success Platform, featuring a smiling man and text about putting customers at the center of everything. The banner also includes links for WATCH DEMOS and FREE TRIAL, and mentions a special gift from NTO.

Travel Approval - Lightning App | +

https://govtartscollegeformenkrish4-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w0000036XggAAE&retUrl=https%3A%2F%2Fgovtartscollegef...

Apps YouTube Maps News Gmail

Lightning App Builder App Settings Pages Travel Approval

App Settings

App Details & Branding

App Options Utility Items (Desktop Only) Navigation Items User Profiles

App Details

*App Name: Travel Approval

*Developer Name: Travel_Approval

Description: Enter a description...

App Branding

Image:  Primary Color Hex Value: #0070D2

Clear

Org Theme Options: Use the app's image and color instead of the org's custom theme

App Launcher Preview



Travel Approval - Lightning App | +

https://govtartscollegeformenkrish4-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w0000036XggAAE&retUrl=https%3A%2F%2Fgovtartscollegef...

Apps YouTube Maps News Gmail

Lightning App Builder App Settings Pages Travel Approval

App Settings

App Options

Utility Items (Desktop Only) Navigation Items User Profiles

App Options

Navigation and Form Factor

*Navigation Style: Standard navigation (selected)

Console navigation

*Supported Form Factors: Desktop and phone (selected)

Desktop Phone

Setup and Personalization

Setup Experience: Setup (full set of Setup options) (selected)

Service Setup

App Personalization Settings

Disable end user personalization of nav items in this app

Disable temporary tabs for items outside of this app

Travel Approval - Lightning App | +

https://govartscollegeformenkrish4-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=02u2w0000036XggAAE&retUrl=https%3A%2F%2Fgovartscollege...

Apps YouTube Maps News Gmail

Lightning App Builder App Settings Pages Travel Approval

App Settings

App Details & Branding
App Options
Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

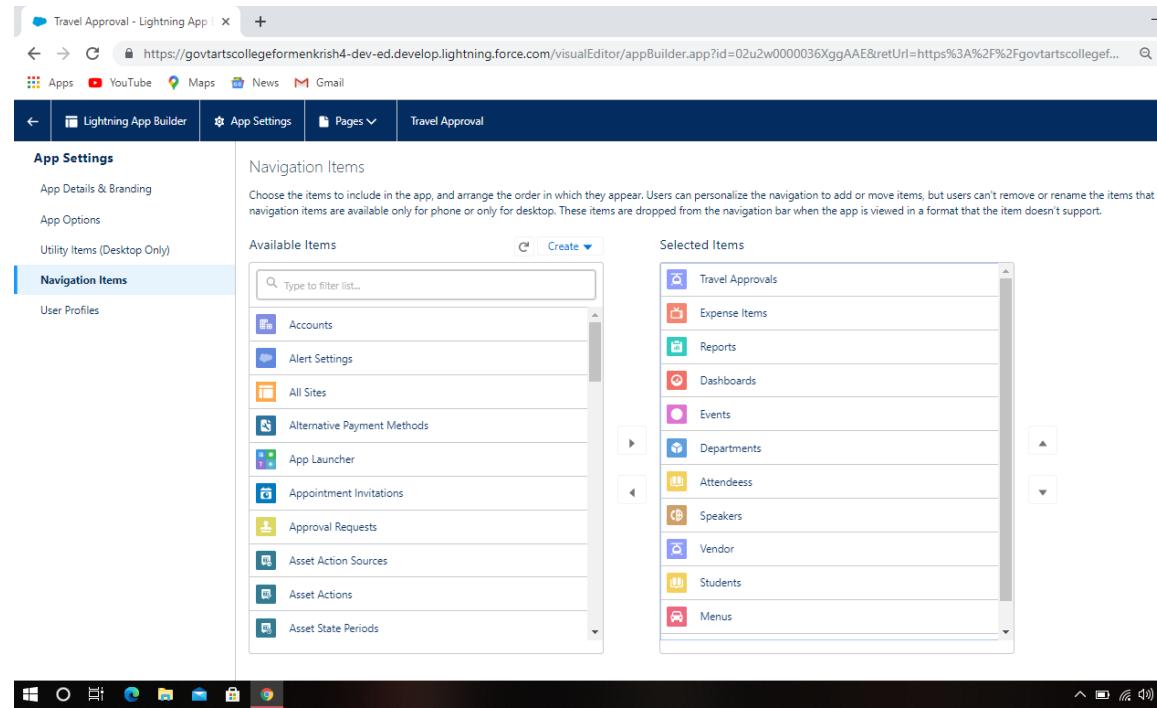
Available Items

Type to filter list...

Accounts
Alert Settings
All Sites
Alternative Payment Methods
App Launcher
Appointment Invitations
Approval Requests
Asset Action Sources
Asset Actions
Asset State Periods

Selected Items

Travel Approvals
Expense Items
Reports
Dashboards
Events
Departments
Attendees
Speakers
Vendor
Students
Menus



Travel Approval - Lightning App | +

https://govartscollegeformenkrish4-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=02u2w0000036XggAAE&retUrl=https%3A%2F%2Fgovartscollege...

Apps YouTube Maps News Gmail

Lightning App Builder App Settings Pages Travel Approval

App Settings

App Details & Branding
App Options

Utility Items (Desktop Only)

Navigation Items
User Profiles

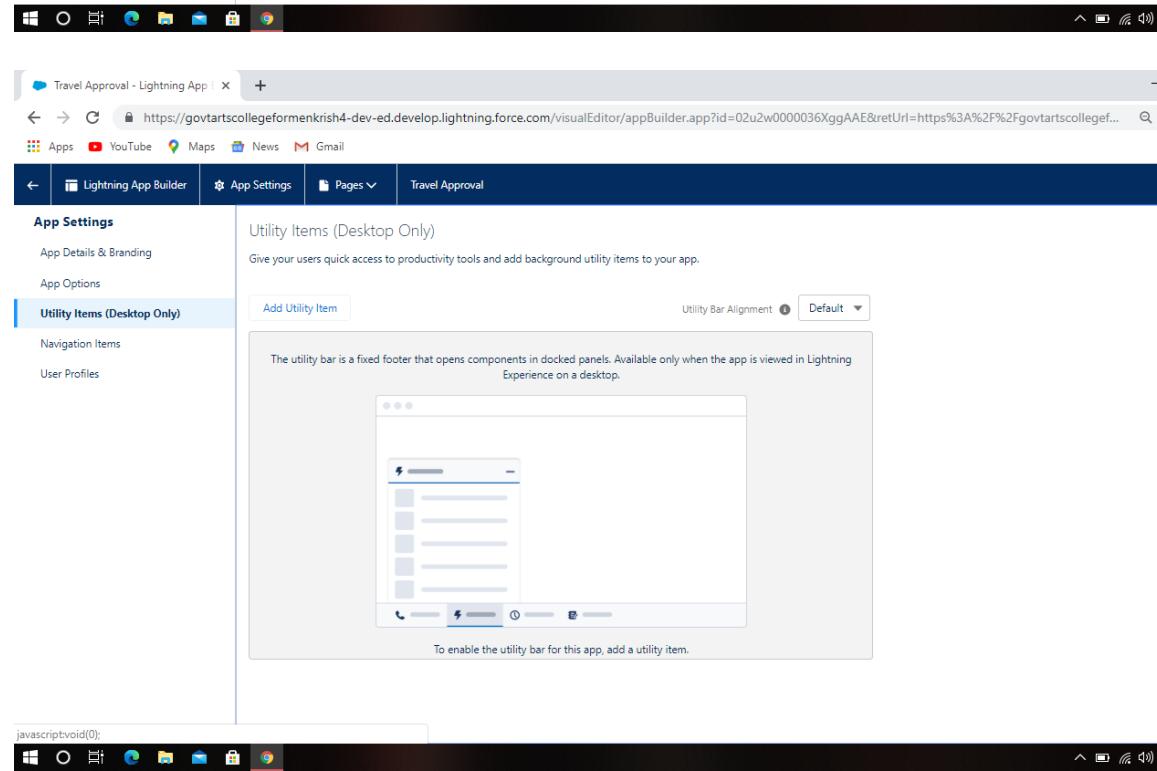
Utility Items (Desktop Only)

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

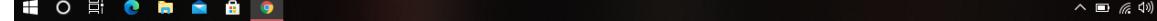
Add Utility Item

Utility Bar Alignment: Default

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.



```
javascipt:void(0);
```



Travel Approval - Lightning App | +

https://govtartscollegeformenkrish4-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=02u2w0000036XggAAE&retUrl=https%3A%2F%2Fgovtartscollegef...

Apps YouTube Maps News Gmail

Lightning App Builder App Settings Pages Travel Approval

App Settings

- App Details & Branding
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles**

User Profiles

Choose the user profiles that can access this app.

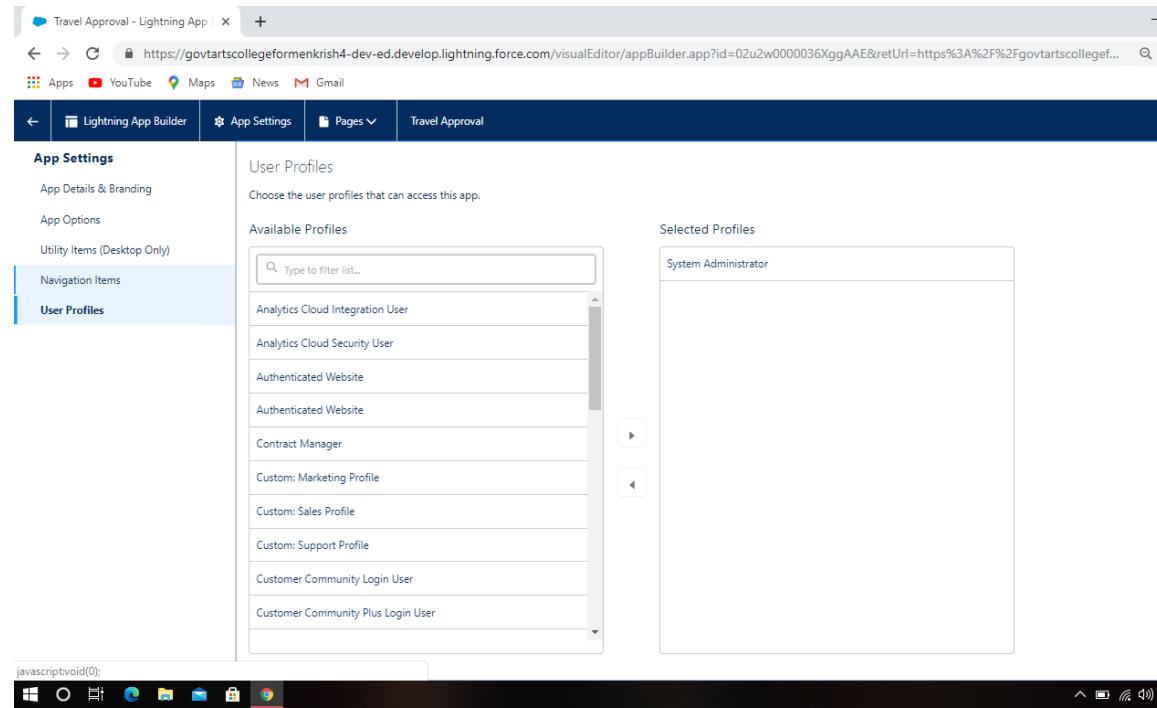
Available Profiles

Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User
- Customer Community Plus Login User

Selected Profiles

System Administrator



Object Manager | Salesforce | +

https://govtartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home

Apps YouTube Maps News Gmail

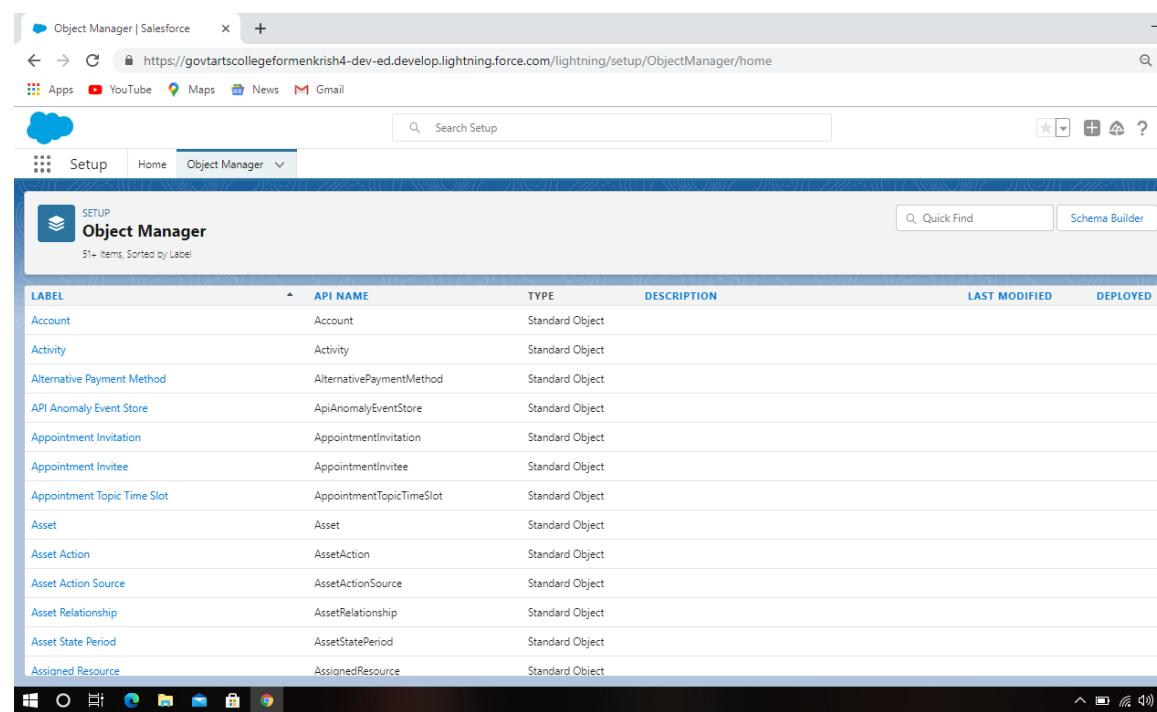
SETUP Object Manager

514 items. Sorted by Label

Search Setup

Quick Find Schema Builder

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			
Assigned Resource	AssignedResource	Standard Object			



New Custom Object | Salesforce

https://govtartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

New Custom Object

Custom Object Definition Edit

Custom Object 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

Content Name: -None-

Save Save & New Cancel

Department | Salesforce

https://govtartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Iw000003cbqF/edit?address=%2F01Iw000003cbqF%2Fe%3Fr...

Setup Home Object Manager

Department

Edit Custom Object Department

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Department Example: Account

Plural Label: Departments Example: Accounts

Starts with vowel sound:

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

Object Name: Department Example: Account

Description:

Context-Sensitive Help Setting:

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Content Name: -None-

Enter Record Name Label and Format

Save Save & New Cancel

Department | Salesforce

https://govartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003cbqF/edit?address=%2F01I2w000003cbqF%2Fe%3Fr...

Setup Home Object Manager

SETUP > OBJECT MANAGER Department

Department Name: Example - Records Name

Data Type: Text

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:

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

Save Save & New Cancel

Travel Approval | Salesforce

https://govartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003cast/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Travel Approval

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

The screenshot shows the Salesforce Setup interface with the title "Travel Approval | Salesforce". The top navigation bar includes links for Apps, YouTube, Maps, News, and Gmail. The main header has a "Search Setup" bar and standard browser controls. Below the header, the "Setup" icon is highlighted, followed by "Home" and "Object Manager". The left sidebar lists various setup categories: Details, Fields & Relationships (selected), 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, and Restriction Rules. The main content area is titled "Fields & Relationships" and displays a table with 16 items, sorted by Field Label. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data in the table is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department	Department__c	Text(10) (Unique Case Sensitive)		✓
Department Field	Department_Field__c	Lookup(Department)		✓
Destination State	Destination_State__c	Text(2)		
Expense Item	Expense_Item__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Menu	Menu__c	Lookup(Menu)		✓
Out-of-Date	Out_of_Date__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Tabs | Salesforce
- URL:** https://govtartscollegeformentenkrish4-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home
- Top Navigation:** Apps, YouTube, Maps, News, Gmail
- Left Sidebar:** Search bar, User Interface (Loaded Console Tab Limit, Rename Tabs and Labels), and a **Tabs** section which is currently selected.
- Search Bar:** Search Setup
- Content Area:**
 - Section Header:** SETUP Tabs
 - Custom Object Tabs:** A table listing custom object tabs with their labels and descriptions:

Action	Label	Tab Style	Description
Edit Del	Allegiances	Books	
Edit Del	Dashboards	Cup	
Edit Del	Documents	Building Block	
Edit Del	Events	Circle	
Edit Del	License Items	CRT TV	
Edit Del	Menus	Car	
Edit Del	Reports	Chess piece	
Edit Del	Speakers	iP Phone	
Edit Del	Students	Books	
Edit Del	Travel Approvals	Helicopter	Travel
Edit Del	Travel Accts	Computer	
Edit Del	Vendor	Helicopter	
 - Web Tabs:** A section stating "No Web Tabs have been defined".

The screenshot shows the Salesforce Setup interface with the title "Travel Approval | Salesforce". The top navigation bar includes links for Apps, YouTube, Maps, News, and Gmail. The main header has a "Search Setup" bar and a "Setup" button. Below the header, there's a breadcrumb trail: "SETUP > OBJECT MANAGER". The main content area is titled "Fields & Relationships" and displays 16 items, sorted by Field Label. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data rows include:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department	Department__c	Text(10) (Unique Case Sensitive)		✓
Department Field	Department_Field__c	Lookup(Department)		✓
Destination State	Destination_State__c	Text(2)		
Expense Item	Expense_Item__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Menu	Menu__c	Lookup(Menu)		✓
Out-of-Date	Out_of_Date__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'Travel Approval' object. The left sidebar lists various setup categories like Details, Page Layouts, Lightning Record Pages, etc. The main content area displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department	Department_c	Text(10) (Unique Case Sensitive)		✓
Department Field	Department_Field_c	Lookup(Department)		✓
Destination State	Destination_State_c	Text(2)		
Expense Item	Expense_Item_c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Menu	Menu_c	Lookup(Menu)		✓
Out-of-Date	Out_of_Date_c	Checkbox		
Owner	OwnerId	Lookup(User/Group)		✓

Expense Item | Salesforce https://govtartscollegeformenkrish4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l2w000003casy/Details/view

Setup Home Object Manager

Expense Item

SETUP > OBJECT MANAGER

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

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

Expense Item | Salesforce https://govtartscollegeformenkrish4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l2w000003casy/FieldsAndRelationships/view

Setup Home Object Manager

Expense Item

SETUP > OBJECT MANAGER

Fields & Relationships
6 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Expense	Expense__c	Picklist		
Expense Item Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Travel Approval	Travel_Approval__c	Master-Detail(Travel Approval)		✓

https://govtartscollegeformenkrish4-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01l2w000003casy/FieldsAndRelationships/view

Home | Salesforce

https://govtartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/setup/DataManagementDataImporter/home

Setup Home Object Manager

Cloud icon

Search Setup

Before you import your data...

Clean up your data import file

Make sure your field names match Salesforce field names

Don't import too many records at once

Import your data in 3 easy steps!

Pre-step: Prepare your data for import

Choose data to import

Edit field mapping

Review and start import

Launch Wizard!

FAQ Data Import video series Additional Resources

This screenshot shows the initial step of the Data Import Wizard. It features a 'Before you import your data...' section with tips about cleaning the data import file, matching field names, and avoiding too many records. Below this is a 'Import your data in 3 easy steps!' section with four sequential icons: 'Pre-step: Prepare your data for import', 'Choose data to import', 'Edit field mapping', and 'Review and start import'. A large green 'Launch Wizard!' button is centered below the steps. At the bottom, there are links for 'FAQ', 'Data Import video series', and 'Additional Resources'.

Home | Salesforce

https://govtartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/setup/DataManagementDataImporter/home

Setup Home Object Manager

Data Import Wizard

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Department	16	0	0	04-12-2023 04:23	130

Bulk API Monitoring

Clean up your data import file

Make sure your field names match Salesforce field names

Don't import too many records at once

Import your data in 3 easy steps!

This screenshot shows the Data Import Wizard interface. It includes a 'Recent Import Jobs' table with one entry: a Closed job for the Department object with 16 records created, 0 updated, and 0 failed, starting at 04-12-2023 04:23 with a processing time of 130 ms. Below the table is a 'Bulk API Monitoring' button. The main area contains the same 'Before you import your data...' tips and 'Import your data in 3 easy steps!' section as the first screenshot.

Users | Salesforce

https://govtartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

SETUP

Users

All Users

On this page you can create, view, and manage users.

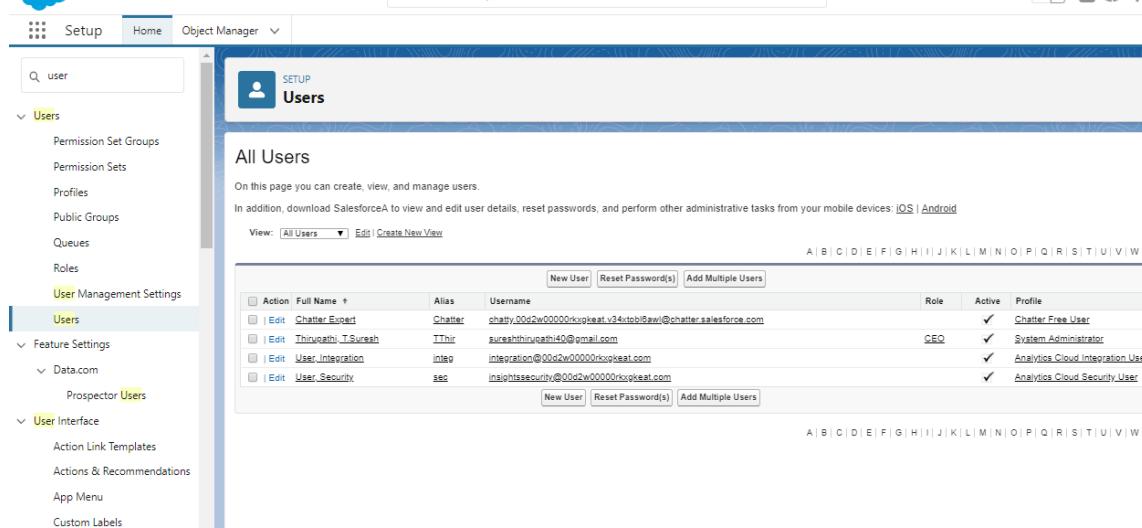
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty@002w00000krgkeat.v34:tob18aw@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	Thiryoathi T.Suresh	TThir	sureshthiruath40@gmail.com	CEO	<input checked="" type="checkbox"/>	System Administrator
Edit	User_Interaction	integ	interaction@002w00000rkxopeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@002w00000rkxopeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

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



Travel Approval | Salesforce

https://govtartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l2w000003cast/PageLayouts/view

Setup Home Object Manager

Search Setup

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

Search Layouts

List View Button Layout

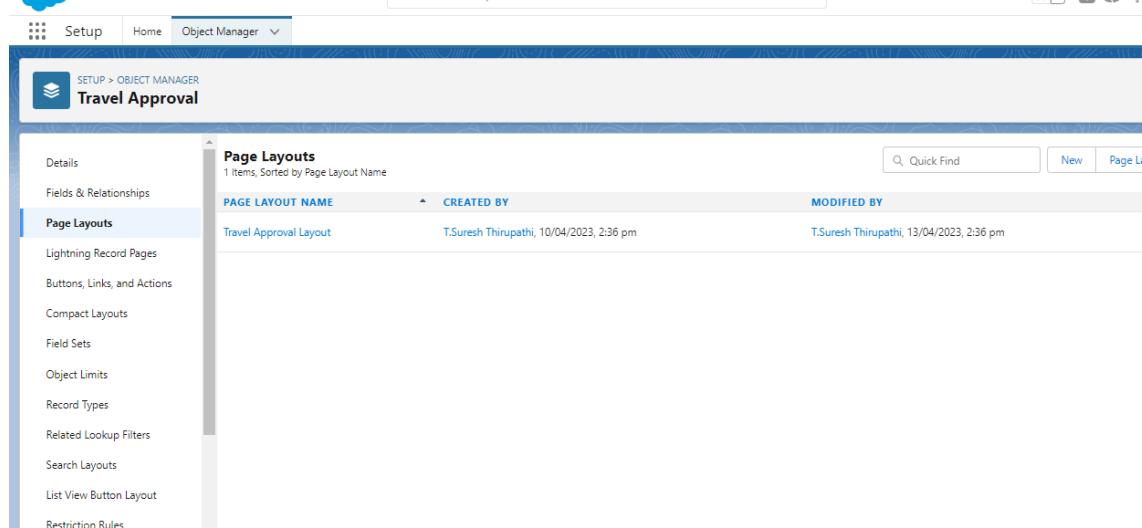
Restriction Rules

Page Layouts

1 items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Travel Approval Layout	T.Suresh Thirupathi, 10/04/2023, 2:36 pm	T.Suresh Thirupathi, 13/04/2023, 2:36 pm

Quick Find | New | Page Layouts



Travel Approval | Salesforce

https://govtartscollegeformenkrish4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003cast/PageLayouts/00h2w00000MuTjuAAN/view

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 Search Layouts List View Button Layout Restriction Rules

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

Quick Find Field Name

Section	Department Field	Menu	Status	Trip End Date
Blank Space			Out-of-Date	Status Indicator
Created By	Expense Item	Owner	Total Expenses	Trip Start Date
Department	Last Modified By	Purpose of Trip	Travel Approval Name	

Travel Approval Detail

Standard Buttons Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Custom Buttons

Information (Header visible on edit only)

Travel Approval Name	GEN-2024-001234
Expense Item	Sample Text
Total Expenses	\$123.45
Status	Sample Text
Status Indicator	Sample Text
Department	Sample Text

Trip Info

Purpose of Trip	Sample Text	Out-of-Date	✓
Trip Start Date	15/04/2023	Destination State	Sample Text
Trip End Date	15/04/2023	Department Field	Sample Text

System Information (Header visible on edit only)

Travel Approval | Salesforce

https://govtartscollegeformenkrish4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003cast/ValidationRules/view

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 Search Layouts List View Button Layout Restriction Rules

Validation Rules
1 items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Trip_End_Date_Trip_Start_Date	Trip End Date	Trip End Date must be greater than or equal to start date	✓	T.Suresh Thirupathi, 13/04/2023, 12:41 pm

Travel Approval | Salesforce

https://govtartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003cast/ValidationRules/03d2w000000i2jsAAA/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Travel Approval

Travel Approval Validation Rule

Back to Travel Approval

Validation Rule Detail

Rule Name	Trip_End_Date__c>Trip_Start_Date__c	Active	✓
Error Condition Formula	Trip_End_Date__c<Trip_Start_Date__c	Error Location	Trip End Date
Error Message	Trip End Date must be greater than or equal to start date		
Description		Modified By	T.Suresh.Thirupathi 13/04/2023, 12:41 pm
Created By	T.Suresh.Thirupathi 12/04/2023, 2:43 pm		

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

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'Travel Approval Validation Rule' and displays its details. The rule is named 'Trip_End_Date__c>Trip_Start_Date__c' and is active. It checks if the end date is greater than the start date and provides an error message if it's not. The rule was created by T.Suresh.Thirupathi on 12/04/2023 at 2:43 pm and modified by the same user on 13/04/2023 at 12:41 pm.

Travel Approval | Salesforce

https://govtartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003cast/FieldsAndRelationships/00N2w00000a0W3l/view

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

Search Layouts

List View Button Layout

Restriction Rules

Travel Approval Custom Field
Total Expenses

Back to Travel Approval

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Object Name	Travel Approval
Field Label	Total Expenses
Field Name	Total_Expenses
API Name	Total_Expenses__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	

Created By T.Suresh.Thirugathi 12/04/2023, 10:57 pm Modified By T.Suresh.Thirugathi 12/04/2023, 10:57 pm

Roll-Up Summary Options

Data Type	Roll-Up Summary
Summarized Object	Expense Item
Field to Aggregate	Expense Item: Amount
Filter Criteria	

Summary Type SUM

Static Resources | Salesforce

https://govtartscollegeformenkrish4-dev-ed.lightning.force.com/lightning/setup/StaticResources/page?address=%2F0B12w000002aVAc

Setup Home Object Manager

Q stat

v Data

State and Country/Territory Picklists

v Custom Code

Static Resources

v Environments

v Deploy Deployment Status

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

SETUP

Static Resources

StatusImages

Static Resource Detail

Name StatusImages

Namespace Prefix	
Description	
MIME Type	application/x-zip-compressed
Cache Control	Private
Size	30,034 bytes
	View file

Created By T.Suresh.Thirugathi, 13/04/2023, 11:57 am Last Modified By T.Suresh.Thirugathi, 13/04/2023, 1:16 pm

Edit Delete Where is this used?

Lightning Experience

https://govartscollegeformenkrish4-dev-ed.develop.lightning.force.com/lightning/o/Department__c/home

Travel Approval Departments Travel Approvals Expense Items Reports Dashboards Events Attendees Speakers Vendor Students More

Department Name

You haven't viewed any Departments recently.
Try switching list views.

Reports | Salesforce

https://govartscollegeformenkrish4-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Travel Approval Departments Travel Approvals Expense Items Reports Dashboards Events Attendees Speakers Vendor Students More

Reports Recent 2 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Cases by Status	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	T.Suresh Thirupathi	13/4/2023, 1:42 pm	
Created by Me	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	15/3/2023, 2:42 pm	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Cases by Status | Salesforce

https://govtartscollegeformenkrish4-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000Dcx6OEAR/view?queryScope=userFolders

Travel Approval Departments Travel Approvals Expense Items Reports Dashboards Events Attendees Speakers Vendor Students More

Report: Cases Cases by Status

Total Records 26

Record Count

Status Department Age Case Owner Account Name Subject Date/Time Opened Open Closed

https://govtartscollegeformenkrish4-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home

Dashboards | Salesforce

https://govtartscollegeformenkrish4-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mrn

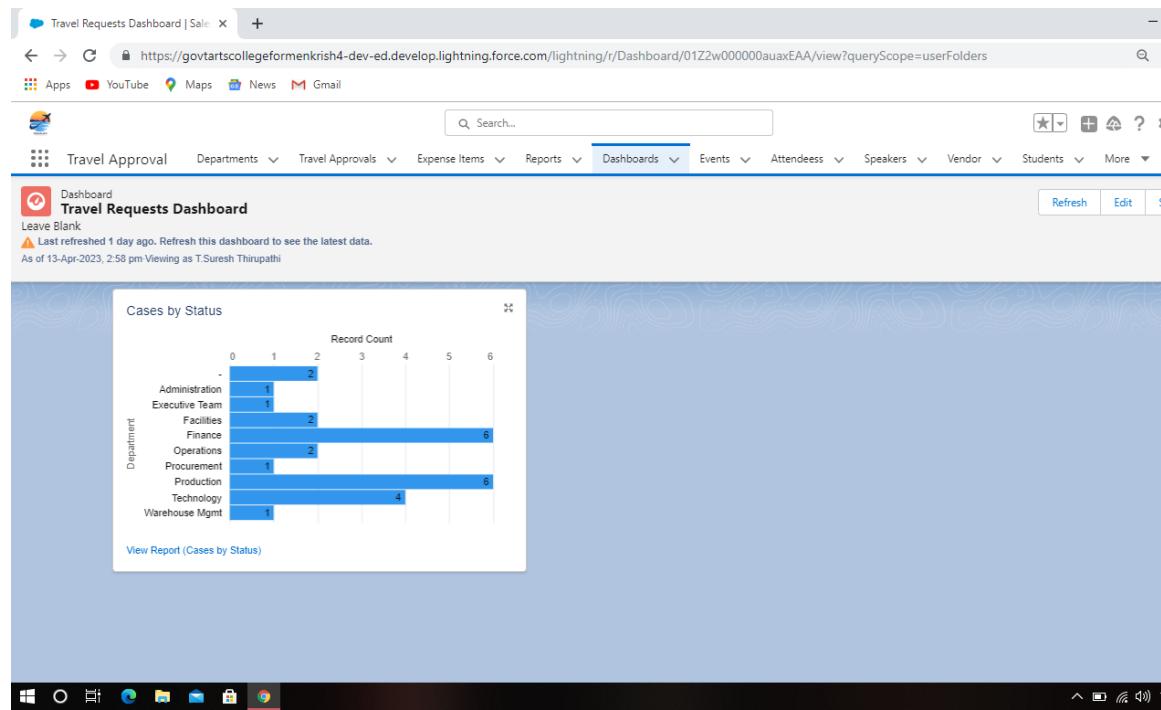
Travel Approval Departments Travel Approvals Expense Items Reports Dashboards Events Attendees Speakers Vendor Students More

Dashboards Recent 1 item

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Travel Requests Dashboard	Leave Blank	Private Dashboards	T.Suresh Thirupathi	13/4/2023, 1:48 pm	

Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites

Search recent dashboards... New Dashboard New F...



The screenshot shows a Salesforce Lightning interface. At the top, there's a navigation bar with links like 'Travel Approval', 'Departments', 'Travel Approvals', 'Expense Items', 'Reports', 'Dashboards', 'Events', 'Attendees', 'Speakers', 'Vendor', 'Students', and 'More'. A search bar is also present. Below the navigation, a message says 'Leave Blank' and 'Last refreshed 1 day ago. Refresh this dashboard to see the latest data.' It also shows the user is viewing as 'T.Suresh Thirupathi' on 'As of 13-Apr-2023, 2:58 pm'. The main content area features a chart titled 'Cases by Status' with the following data:

Department	Record Count
Administration	1
Executive Team	1
Facilities	2
Finance	6
Operations	2
Procurement	1
Production	5
Technology	4
Warehouse Mgmt	1

[View Report \(Cases by Status\)](#)

4 Trailhead Profile Public URL

Team Leader -

<https://trailblazer.me/id/tthirupathi3>

Team Member 1 - <https://trailblazer.me/id/mvijay111>

Team Member 2

<https://trailblazer.me/id/mrathinam4>

Team Member 3-

<https://trailblazer.me/id/bbalaji59>

5 ADVANTAGES & DISADVANTAGE

1. ADVANTAGES:

- *Develop Stronger relationship
- *Employee Motivation
- *An opportunity to refresh and recharge
- *Improve retention
- *Attract new staff

2. DISADVANTAGE

- *Look into perks that all staff can enjoy
- *Have a virtual office party
- *Don't skip weekly one to ones
- *Encourage your staff to take a break.

6 APPLICATIONS::

This document covers the following topics:

About the Sample Application

Prerequisites

Installing the Sample Application

Defining the Use of an External Web Browser

Starting the Sample Application

Logging in as an Employee for Requesting a Business Trip

Entering a Travel Request with Flight and Hotel Information

Adding Additional Expenses to Your Travel Request

Logging in as a Manager for Approving Travel Requests

Approving a Travel Request

7 CONCLUSION

As business travel trends evolve , employees expect freedom and better travel experiences. If you pay attention to your travel policy, review them often , update it, and ensure your employees are well informed ,you are on the right track. Also, by automating , you can offer a better travel experience and ensure that your travel compliance numbers in improve .

8 FUTURE SCOPE:

Identify the employees under the purview of the travel policy. Line managers, TMCs, sales, and service staff are examples of some employees under the gamut of travel policy.