

# BUILD A EMPLOYE TRAVEL APPROVAL FOR CORPORATE

## 1.INTRODUCTION

- Employees travel on business trips to attend conferences, perform research, scout potential locations, meet suppliers, visit clients, and for numerous other essential reasons.
- Whatever the reason, such trips enable them to seek lucrative opportunities, build relationships, solve problems, enhance productivity, and drive growth.
- Unfortunately, a persistent problem facing many with such aspirations is that they often find themselves in situations where the trips become a tiresome burden with exponentially higher costs than expected.

### 1.1 Overview

- Travel expense approval workflows can eliminate bottlenecks in the process, help boost efficiency and improve workplace productivity.
- What is travel approval? Travel approval is a procedure using which organizations enforce travel policies and prevent employees from overspending.

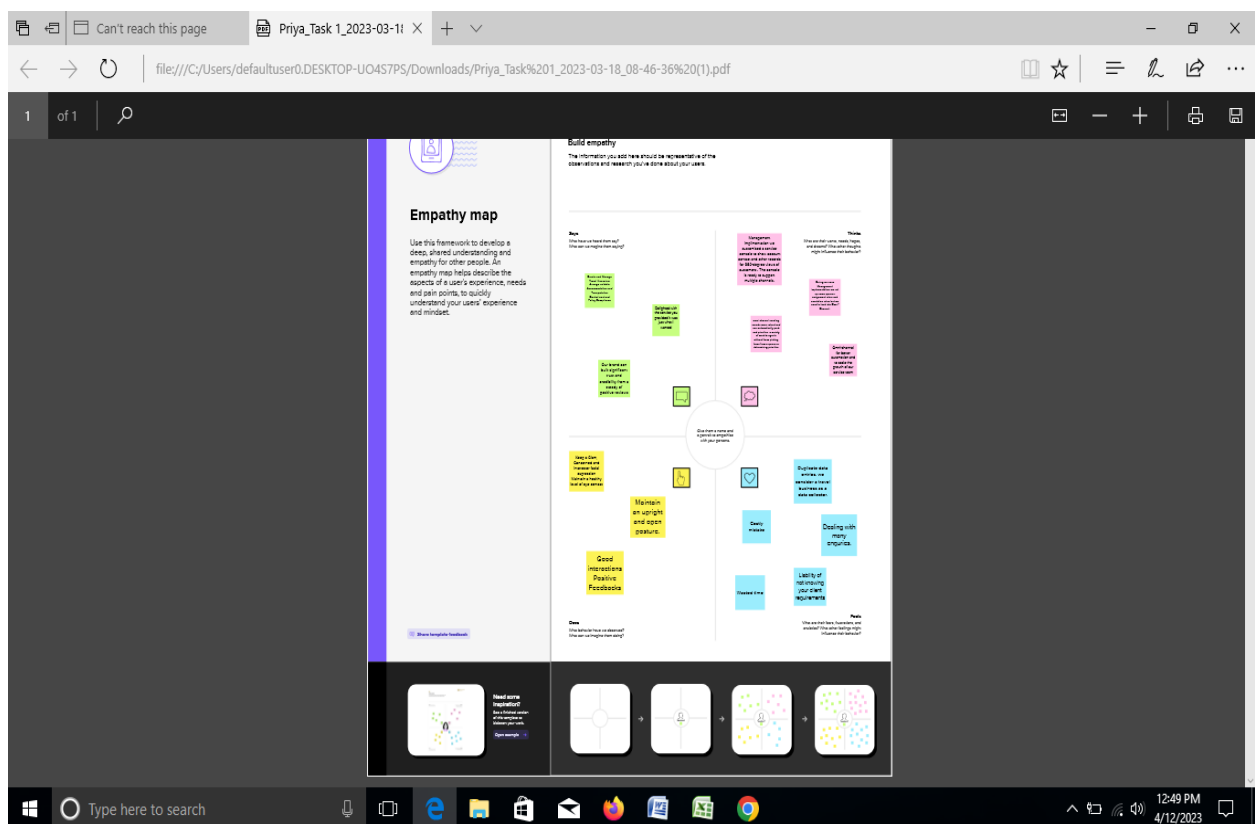
### 1.2 PURPOSE

- Corporate travel fosters idea sharing and economic growth.

One of the primary purposes of business travel is **to share knowledge and ideas**.

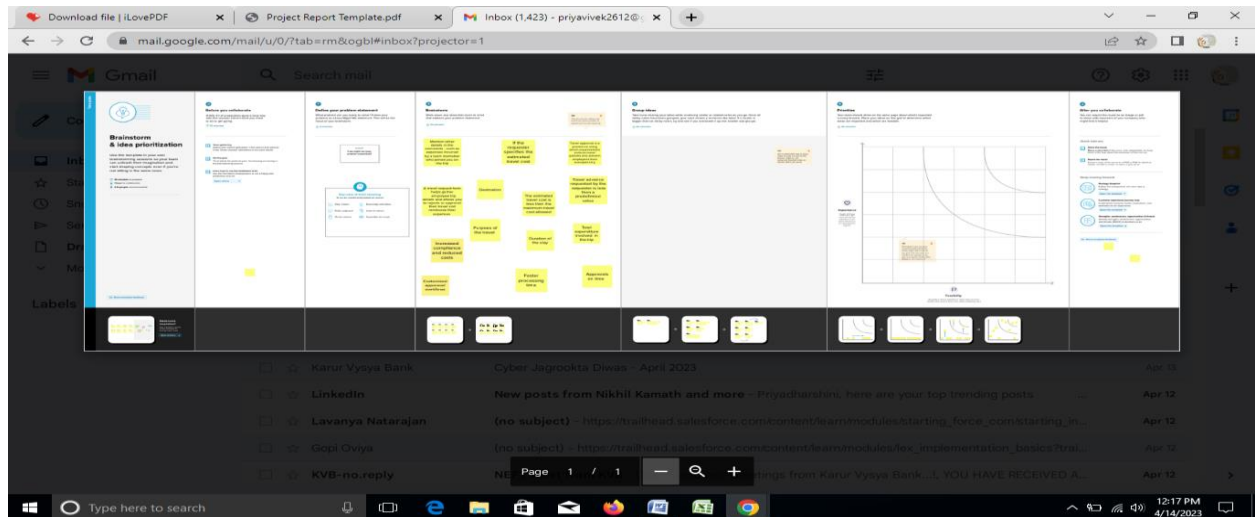
## 2. PROBLEM DEFINITION @ DESIGN THINKING

### 2.1 EMPATHY MAP



Here the screenshot of empathy map

## 2.2 Ideation @ Brainstroming Map



### 3.RESULT

Object Name	Fields in the Object	
Object 1 Department	Field label	Data type
	Amount	currency
Object 2 Travel Approval	Field label	Data type
	Travel Approval	Auto Number
	Travel Approval	Master detail relationship
Object 3 Expense Item	Field label	Data type
	Expense Item	Picklist

## Activiy&Screenshot

# Object 1: Department

The screenshot shows the Salesforce Setup interface for editing a custom object named 'DEPARTMENT'. The left sidebar contains a 'Details' menu with options like Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Edit Custom Object DEPARTMENT' and includes a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'Custom Object Information' section, which includes a warning about singular and plural labels. The 'Label' field is set to 'DEPARTMENT' (Example: Account), the 'Plural Label' is 'DEPARTMENTS' (Example: Accounts), and the 'Object Name' is 'DEPARTMENT' (Example: Account). The 'Description' field is empty. At the bottom, the 'Context-Sensitive Help Setting' is set to 'Open the standard Salesforce.com Help & Training window'.

The given field label as AMOUNT and the data type as currency

# Object 2: TRAVEL APPROVAL

The screenshot shows the Salesforce Setup interface for editing a custom object named 'TRAVEL APPROVAL'. The left sidebar contains a 'Details' menu with options like Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Edit Custom Object TRAVEL APPROVAL' and includes a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'Custom Object Information' section, which includes a warning about singular and plural labels. The 'Label' field is set to 'TRAVEL APPROVAL' (Example: Account), the 'Plural Label' is 'TRAVEL APPROVALS' (Example: Accounts), and the 'Object Name' is 'TRAVEL\_APPROVAL' (Example: Account). The 'Description' field is empty. At the bottom, the 'Context-Sensitive Help Setting' is set to 'Open the standard Salesforce.com Help & Training window'.

The given field label as TRAVEL APPROVAL and the data type as Auto Number

## Object 3: EXPENSE ITEMS

The screenshot shows the Salesforce Object Manager interface for the 'EXPENSE ITEM' object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Edit Custom Object EXPENSE ITEM' and includes a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'Custom Object Information' section, which contains the following fields:

- Label:** EXPENSE ITEM (Example: Account)
- Plural Label:** EXPENSE ITEMS (Example: Accounts)
- Starts with vowel sound:** ☒
- Object Name:** expense\_item (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:** ☒ Open the standard Salesforce.com Help & Training window, ☐ Open a window using a Visualforce page

The browser address bar shows the URL: `governmentartsandsience91-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XmA0/edit?address=%2F012w000003XmA0%2Fe%3Fr...`

## IMPORT DEPARTMENTS

The screenshot shows the Salesforce Data Import Wizard interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Getting closer...' and features a progress bar with three stages: 'Choose data', 'Edit mapping', and 'Start import'. The 'Choose data' stage is active, showing a list of objects to import:

Standard objects	Custom objects
DEPARTMENTS	
TRAVEL APPROVALS	
EXPENSE ITEMS	

The 'What do you want to do?' section shows the following options:

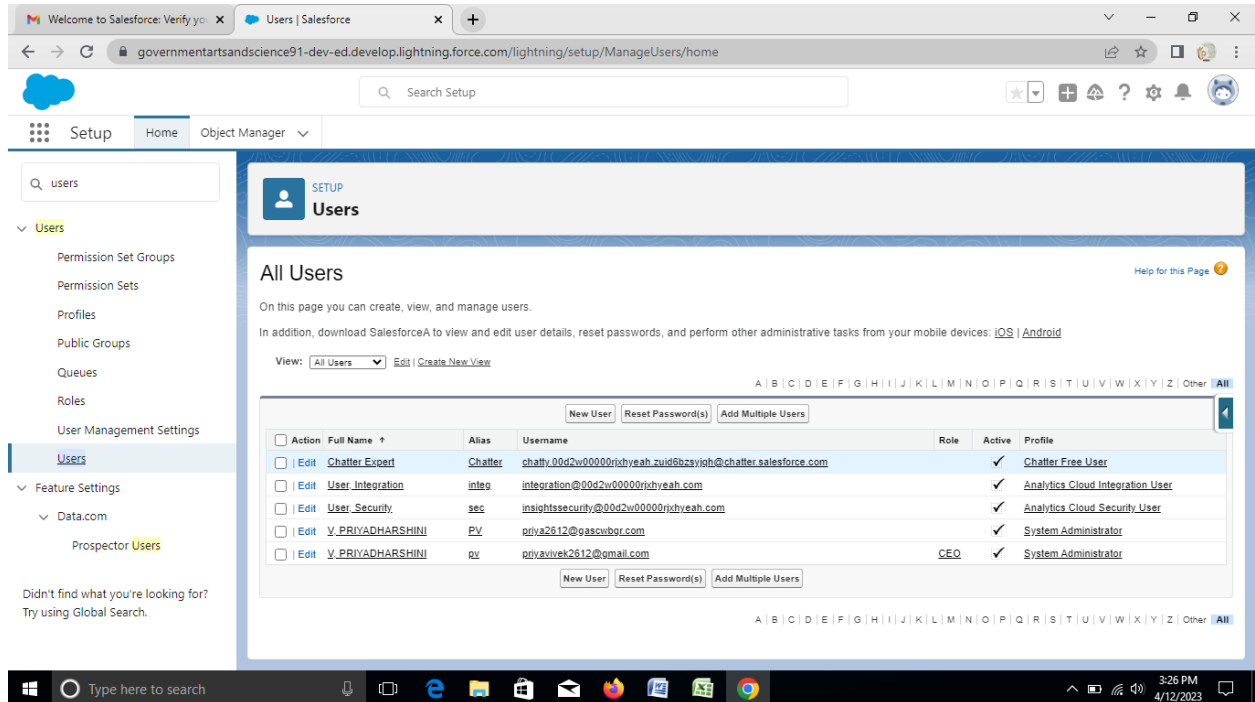
- Add new records** (checked)
- Match by:** --None--
- Which User field in your file designates record owners?** --None--
- Trigger workflow rules and processes?** ☐

The 'Where is your data located?' section shows the following options:

- Drag CSV file here to upload**
- File:** Choose File (No file chosen)
- Character Code:** ISO-8859-1 (General US & Western European, ISO-LATIN-1) (checked)
- Values Separated By:** Comma

The bottom navigation bar includes 'Cancel', 'Previous', and 'Next' buttons. The browser address bar shows the URL: `governmentartsandsience91-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home`

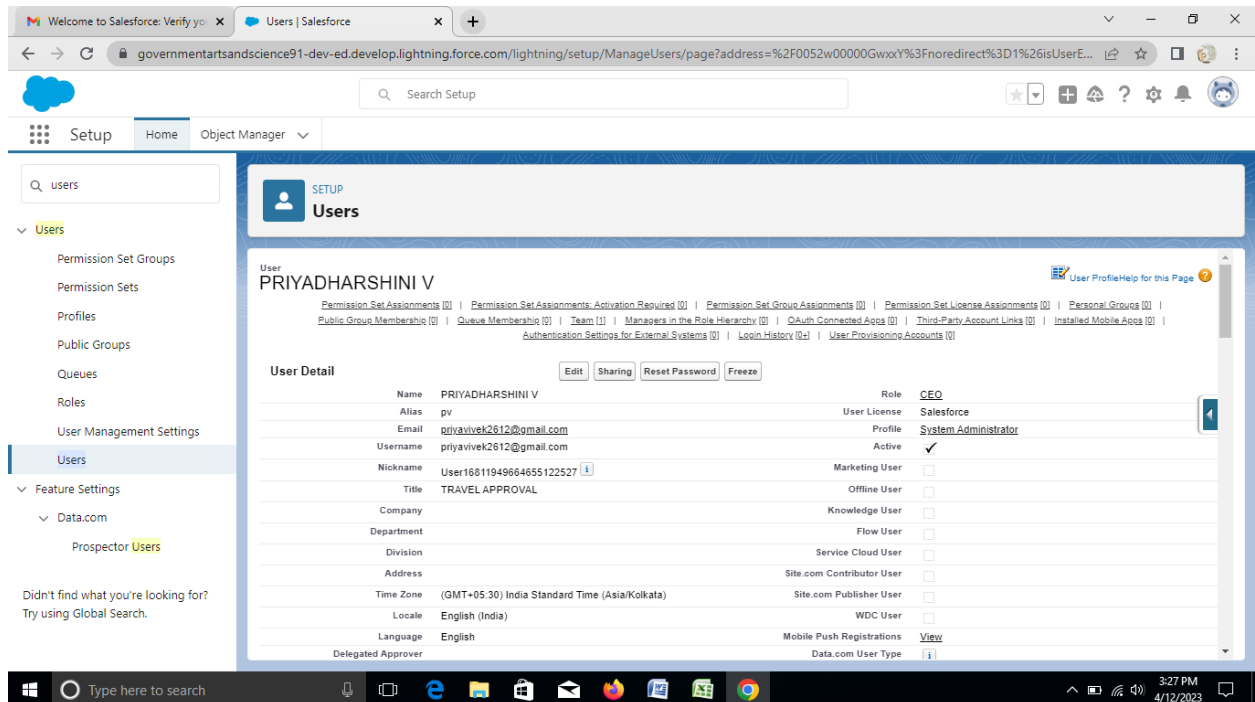
**From setup click on data import or select data import wizard then launch wizard ,now upload the department. Csv which downloaded using the zip file....**



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Feature Settings, and Data.com. The main content area is titled "All Users" and includes a search bar, a view selector (All Users), and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are Chatter Expert, User Integration, User Security, V\_PRIYADHARSHINI, and V\_PRIYADHARSHINI.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00d2w00000rjhyeah_zuid6bzv0th@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000rjhyeah.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d2w00000rjhyeah.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	V_PRIYADHARSHINI	PV	pvvavivek2612@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	V_PRIYADHARSHINI	qv	pvvavivek2612@gmail.com	CEO	✓	System Administrator

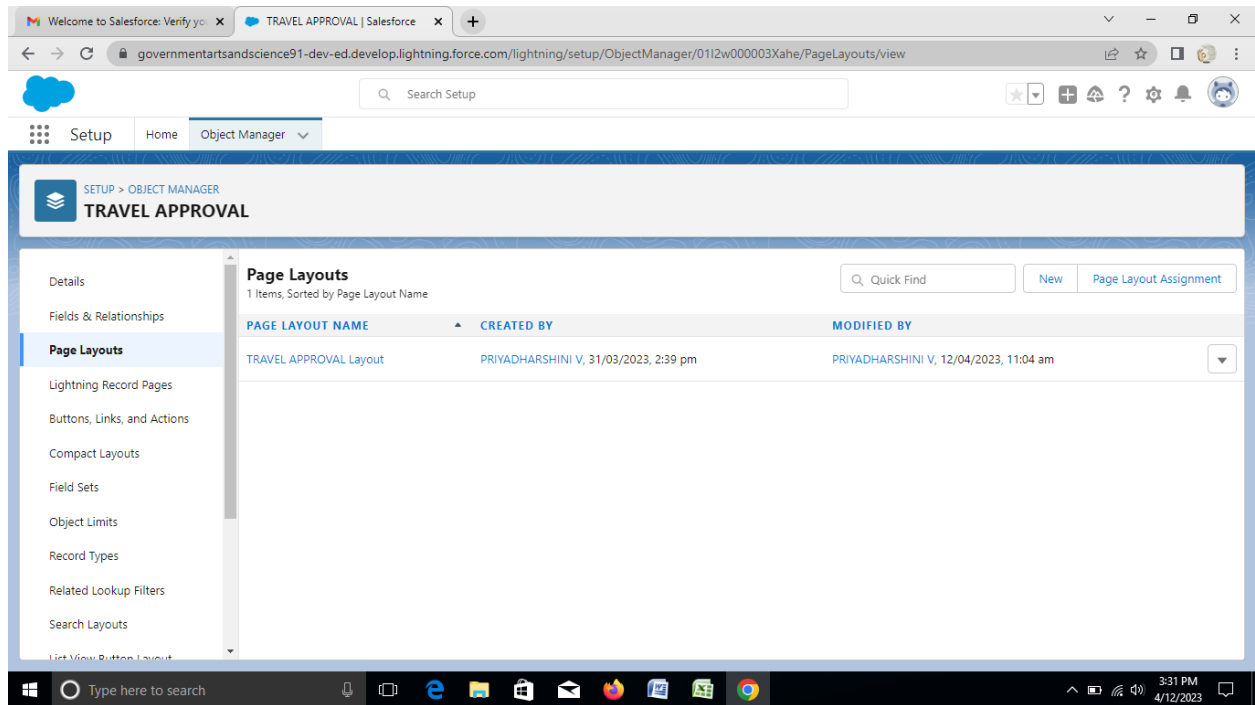
## CUSTOMIZE USER INTERFACE



The screenshot shows the Salesforce Setup interface with the user profile for V\_PRIYADHARSHINI. The left sidebar is the same as the previous screenshot. The main content area is titled "User PRIYADHARSHINI V" and includes a search bar, a view selector (User Profile), and a detailed user profile. The profile includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, and Delegated Approver. The user is assigned the role of CEO and the profile of System Administrator.

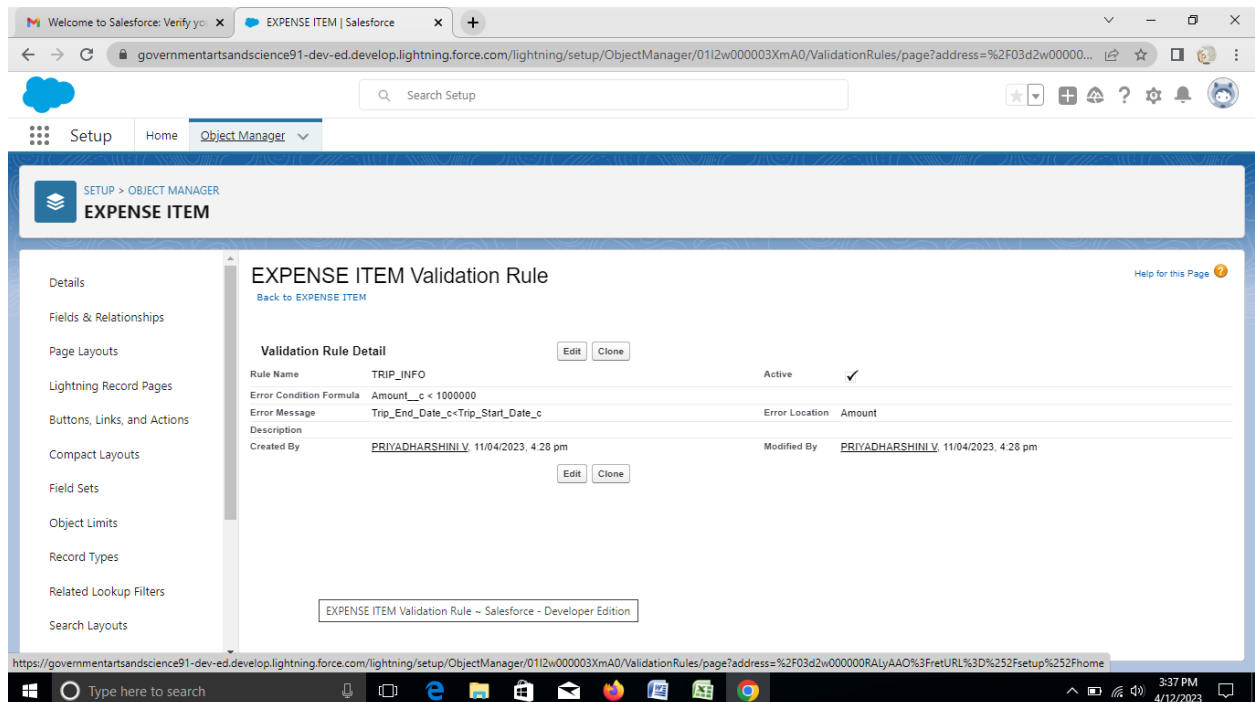
Name	Alias	Email	Username	Nickname	Title	Company	Department	Division	Address	Time Zone	Locale	Language	Delegated Approver
PRIYADHARSHINI V	pv	pvvavivek2612@gmail.com	pvvavivek2612@gmail.com	User1681194966465512527	TRAVEL APPROVAL					(GMT+05:30) India Standard Time (Asia/Kolkata)	English (India)	English	

# USE CUSTOMIZATION



From the object manager ,search for travel approval object and click on page layouts and click edit

Then drag section from the top pane directly below the information section .when dragging over the page you get a visual indicator of where you can drop the new section



# Add Business logic to travel app

The screenshot shows the Salesforce Setup interface for configuring a Validation Rule for the 'EXPENSE ITEM' object. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'EXPENSE ITEM Validation Rule' and includes a 'Back to EXPENSE ITEM' link. Below the title is the 'Validation Rule Detail' section with the following information:

Validation Rule Detail		Active	✓
Rule Name	TRIP_INFO		
Error Condition Formula	Amount__c < 1000000		
Error Message	Trip_End_Date_c<Trip_Start_Date_c	Error Location	Amount
Description			
Created By	PRIVADHARSHINI V. 11/04/2023, 4:28 pm	Modified By	PRIVADHARSHINI V. 11/04/2023, 4:28 pm

Buttons for 'Edit' and 'Clone' are available for the Rule Name, Error Message, and the bottom row of the details.

Validation rules and give your rule a name and make sure that the rule is set to active .the error condition formula enter Trip \_End\_Date \_\_c<Trip \_Start \_Date\_\_c

The error location location select field and pick trip end date as the location for error

# Create Roll UP Summary Field

The screenshot shows the Salesforce Setup interface for configuring a Static Resource. The left sidebar contains navigation links: 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). The main content area is titled 'Static Resources' and includes a 'Help for this Page' link. Below the title is the 'Static Resource Detail' section for a resource named 'StatusImage'.

Static Resource Detail		Edit	Delete	Where is this used?
Name	StatusImage			
Namespace Prefix				
Description				
MIME Type	application/zip			
Cache Control	Private			
Size	39,130 bytes			
	<a href="#">View file</a>			
Created By	PRIVADHARSHINI V. 11/04/2023, 11:54 pm			
Last Modified By	PRIVADHARSHINI V. 11/04/2023, 11:54 pm			

Buttons for 'Edit', 'Delete', and 'Where is this used?' are available at the bottom of the details section.



# Create Formula Fields

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "static" entered and a list of items including "Custom Code" and "Static Resources". The main content area is titled "Static Resources" and shows a table with one record, "StatusImage". The record details include:

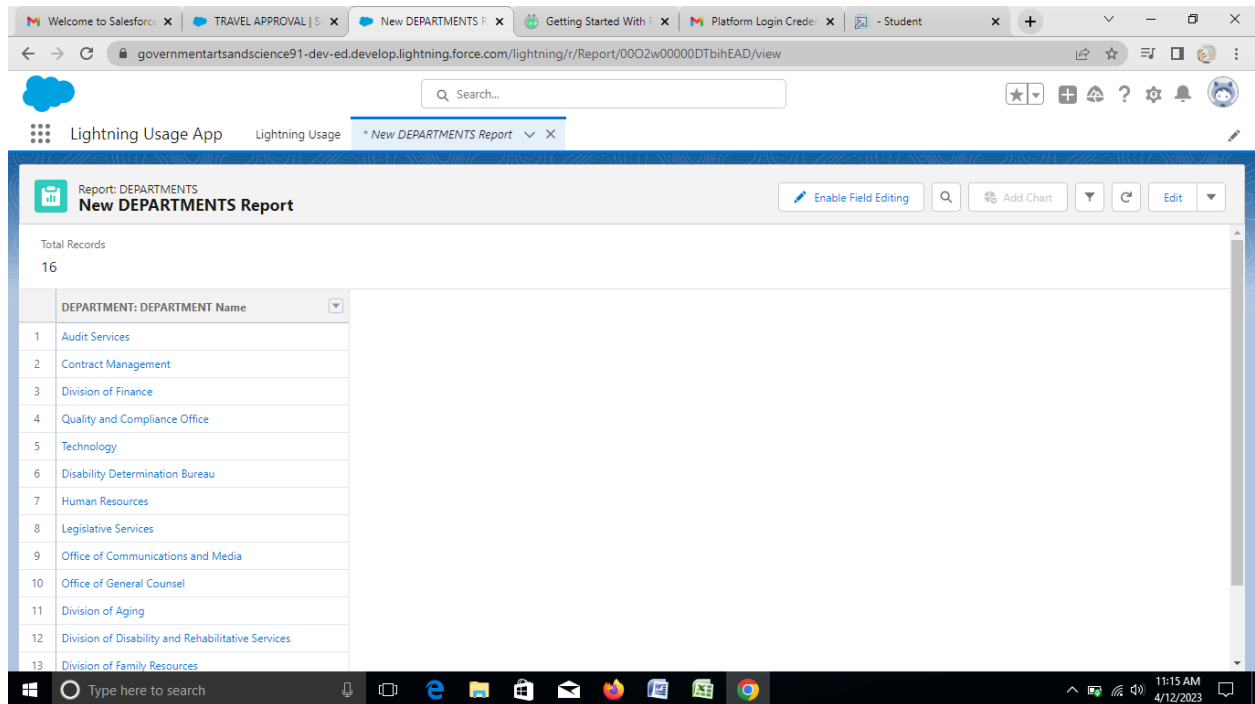
Name	StatusImage
Namespace Prefix	
Description	
MIME Type	application/zip
Cache Control	Private
Size	39,130 bytes
	<a href="#">View file</a>
Created By	PRIVADHARSHINI V. 11/04/2023, 11:54 pm
Last Modified By	PRIVADHARSHINI V. 11/04/2023, 11:54 pm

At the bottom of the record details are buttons for "Edit", "Delete", and "Where is this used?".

# REPORTS

The screenshot shows the Salesforce Lightning Usage App report. The report is titled "Report: DEPARTMENTS New DEPARTMENTS Report". It shows a list of 16 records, each with a department name and a link to view the report. The records are:

DEPARTMENT: DEPARTMENT Name
1 Audit Services
2 Contract Management
3 Division of Finance
4 Quality and Compliance Office
5 Technology
6 Disability Determination Bureau
7 Human Resources
8 Legislative Services
9 Office of Communications and Media
10 Office of General Counsel
11 Division of Aging
12 Division of Disability and Rehabilitative Services
13 Division of Family Resources



## Trailhead Profile URL

**TEAM LEAD** - <https://trailblazer.me/id/priyv42>

**Team Member 1**-<https://trailblazer.me/id/lnatarajan2>

**Team Member 2**-<https://trailblazer.me/id/mthiru51>

**Team Member 3**-<https://trailblazer.me/id/oviyk>

## ADVANTAGES & DISADVANTAGES

### ADVANTAGES OF EMPLOYE TRAVEL APPROVAL

- Improved accuracy of important approval data.
- compliance tasks that are always completed.
- Defined processes that outlast employees.

- continual improvement of processes over time

## **DISADVANTAGES OF EMPLOYEE TRAVEL APPROVAL**

- More Networking Opportunities. ...
- To Meet with Prospective Clients. ...
- It Can Be Expensive. ...
- Travelling Can Be Stressful. ...
- A High Level of Unproductivity. ...
- It Can Affect Health and Fitness. ...
- Missing Friends and Family. ...
- Final Thoughts.



