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**.

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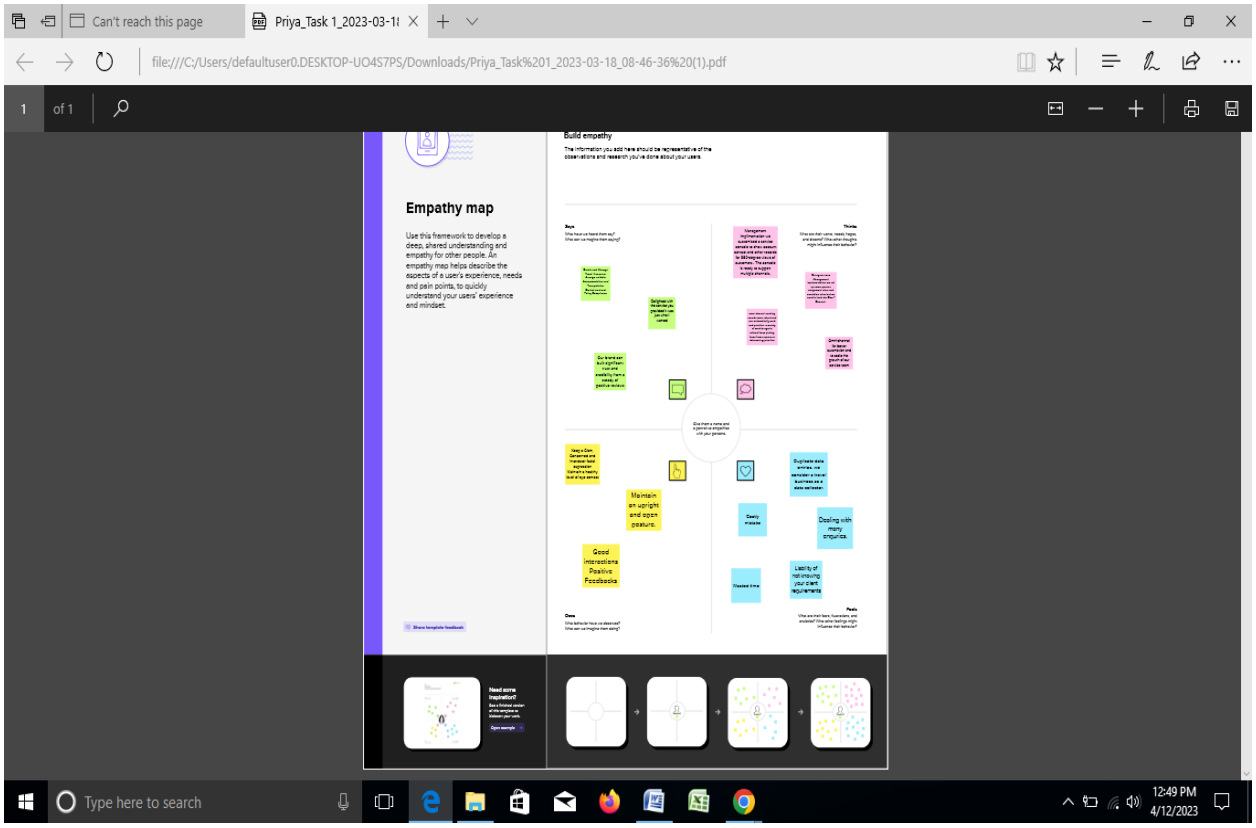
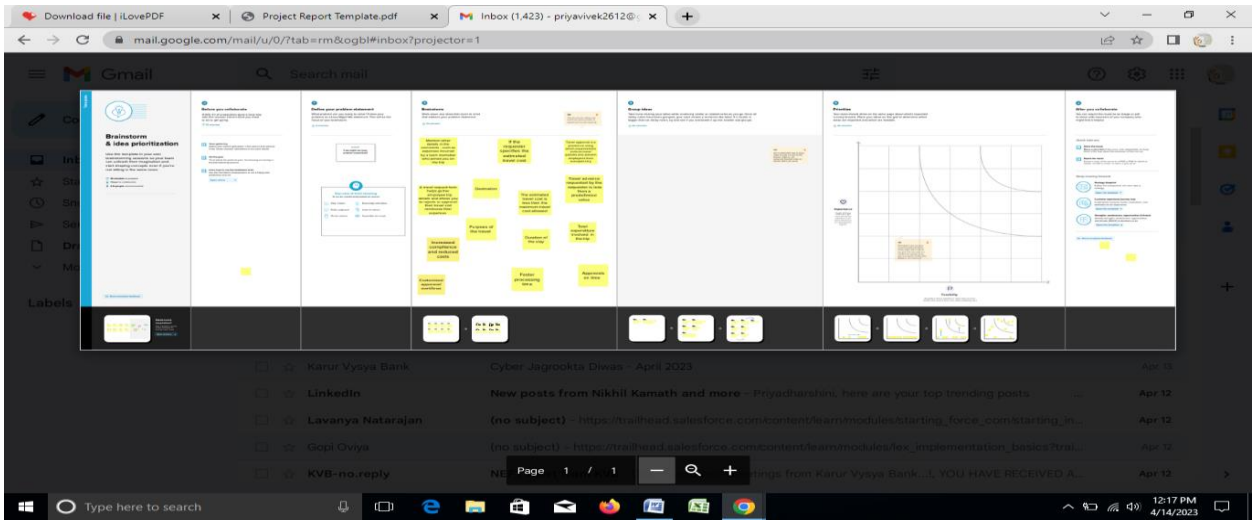
2. PROBLEM DEFINITION @ DESIGN THINKING

2.1 EMPATHY MAP



Here the screenshot of empathy map

2.2 Ideation @ Brainstroming Map

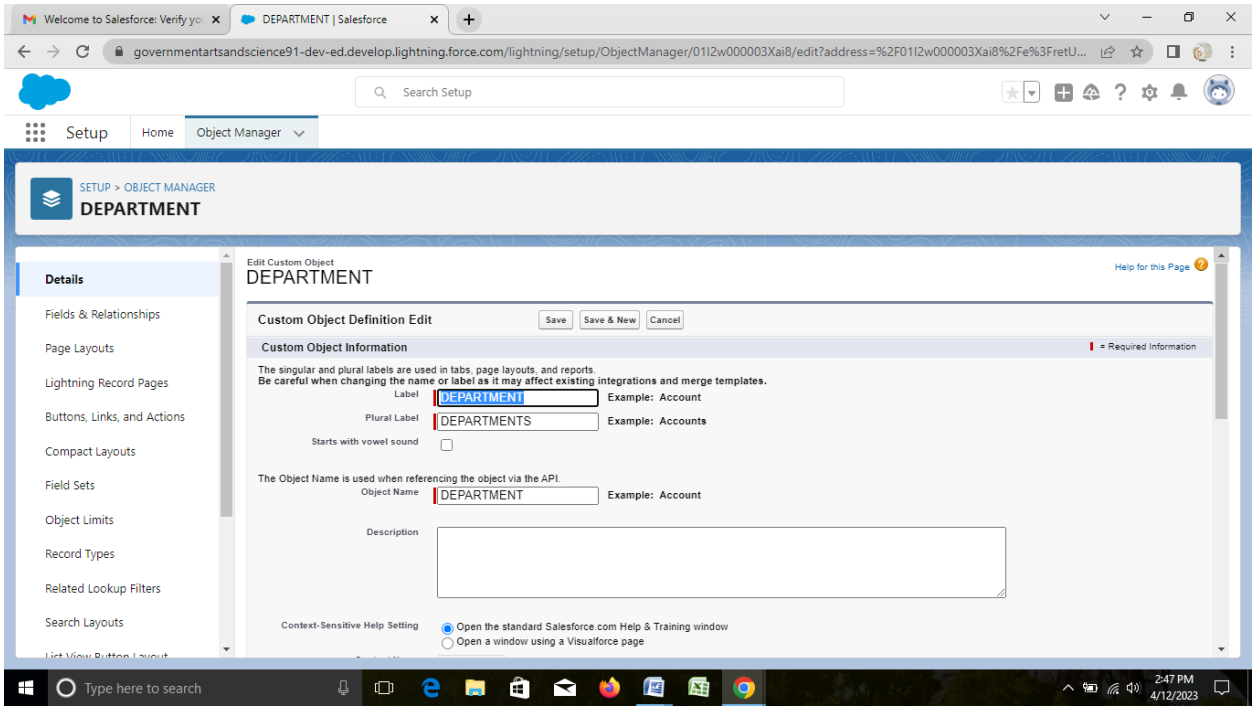


3.RESULT

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

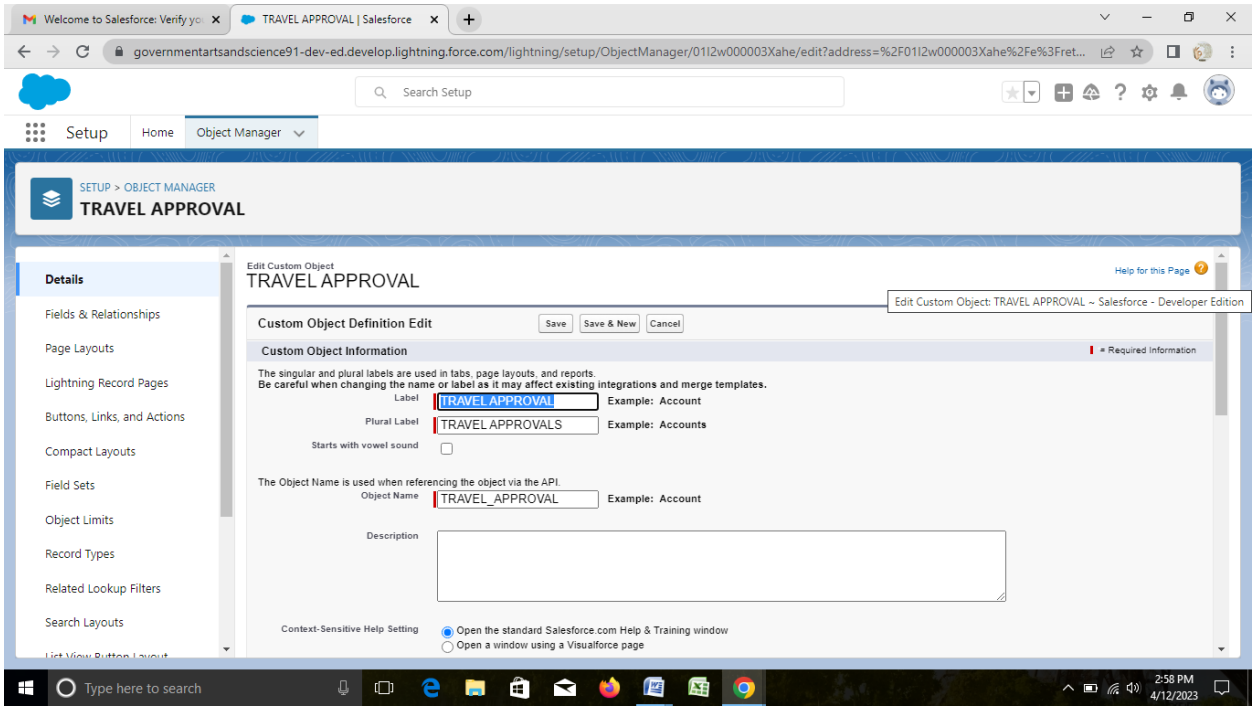
Activiy&Screenshot

Object 1: Department



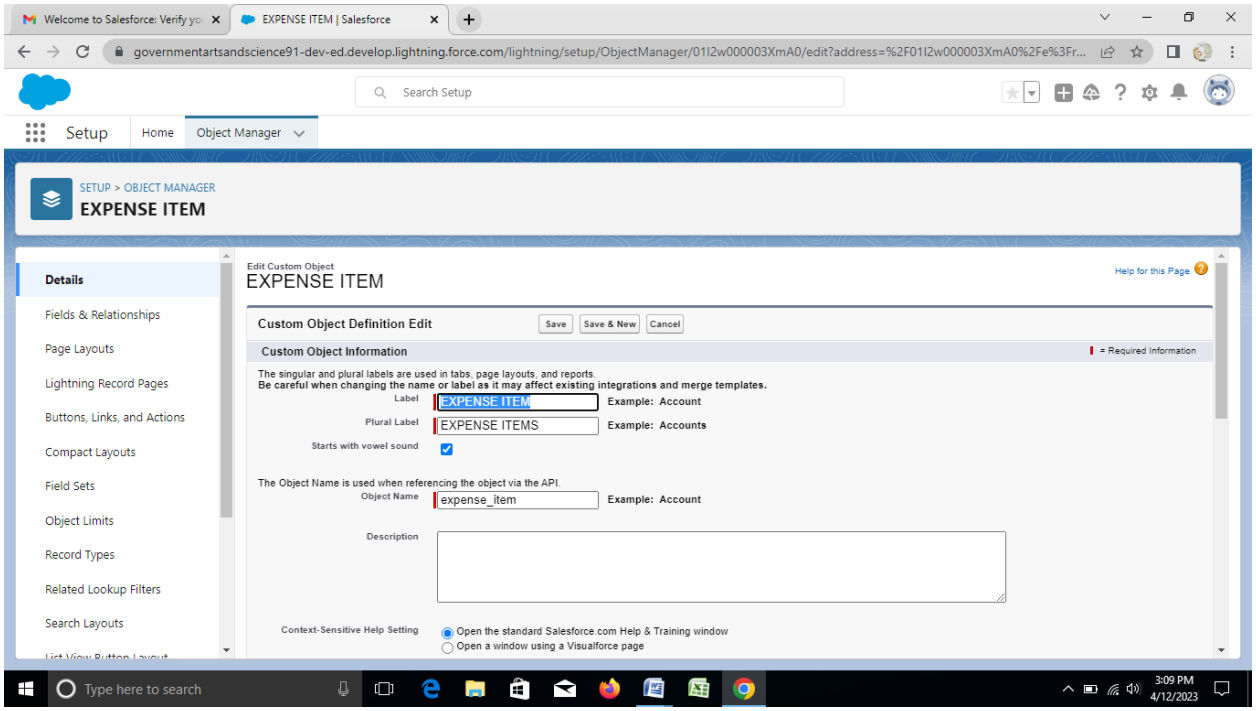
The given field label as AMOUNT and the data type as currency

Object 2: TRAVEL APPROVAL

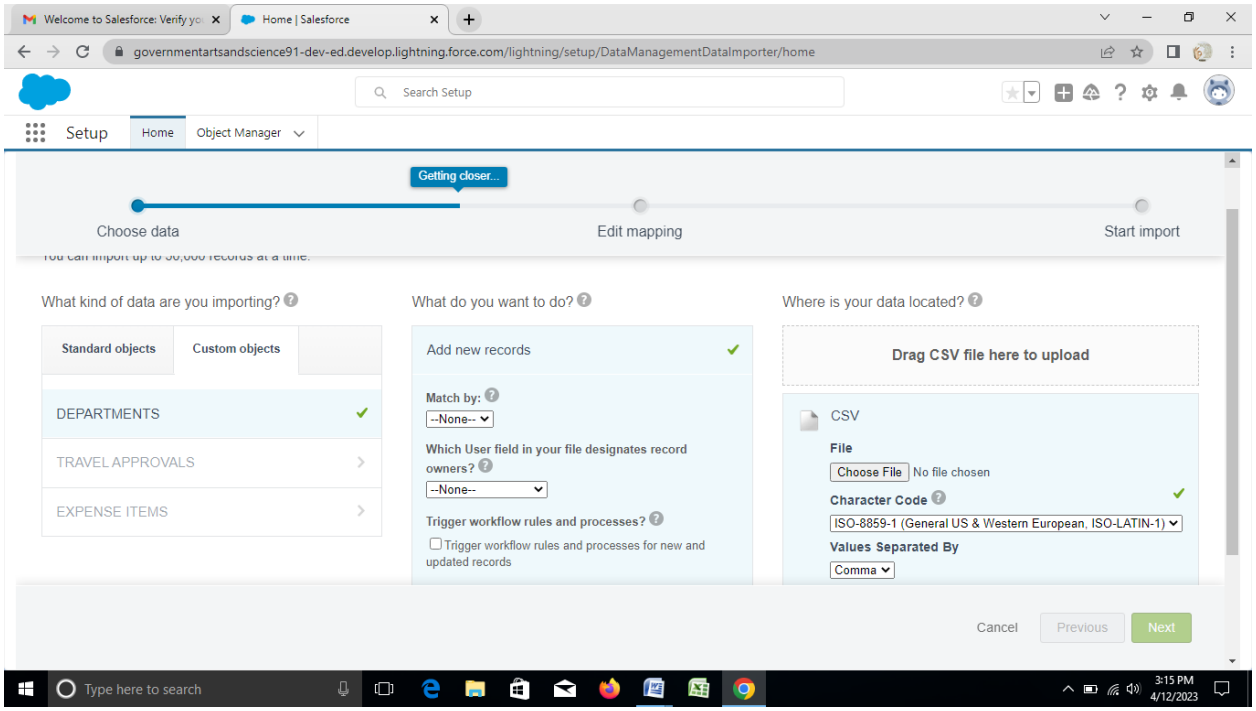


The given field label as TRAVEL APPROVAL and the data type as Auto Number

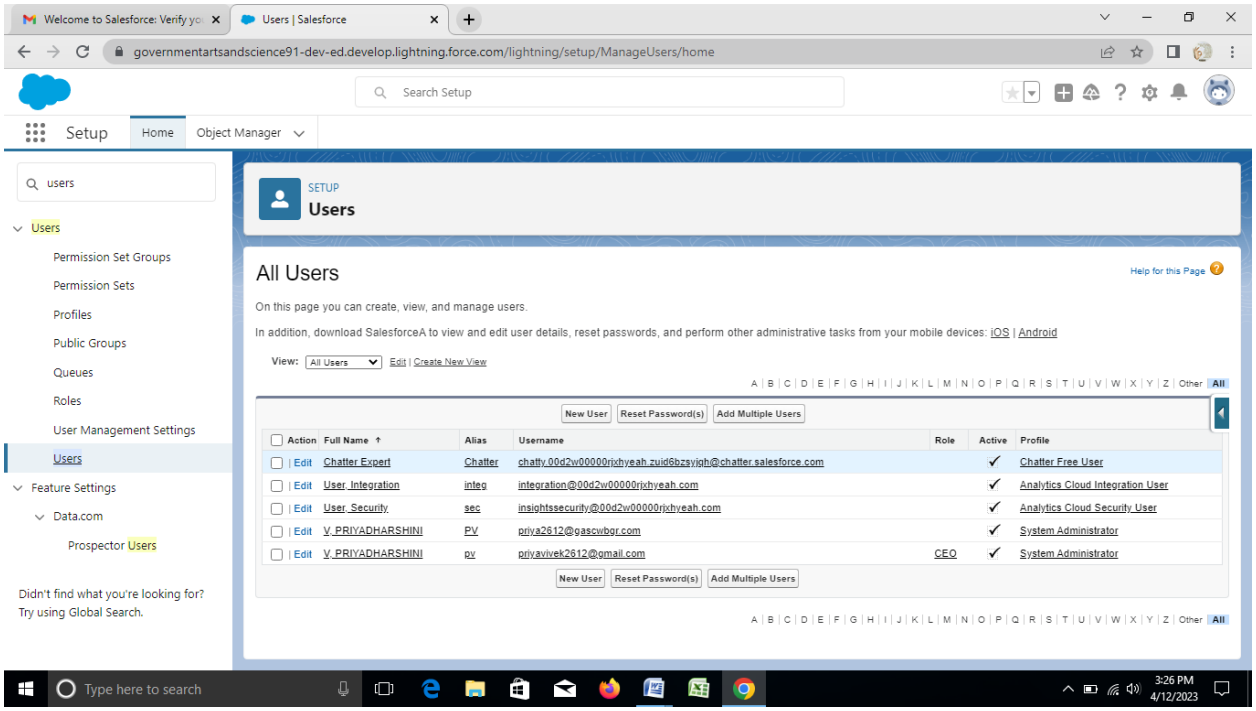
Object 3: EXPENSE ITEMS



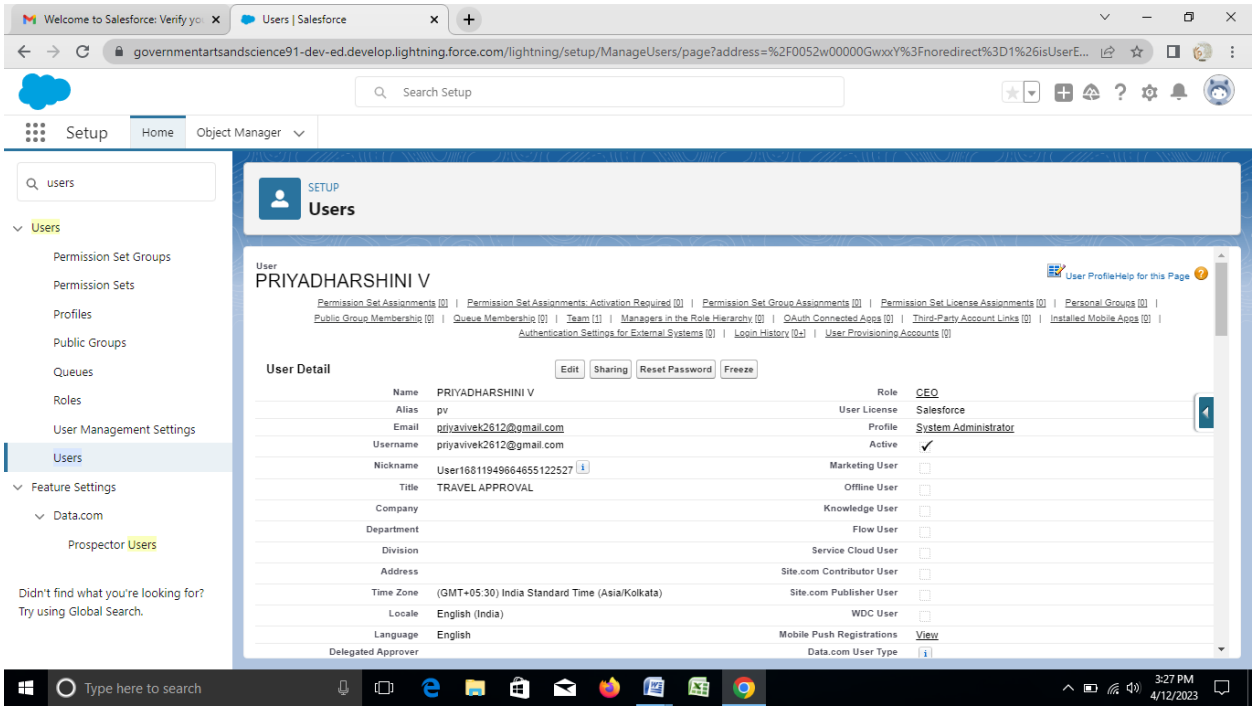
IMPORT DEPARTMENTS



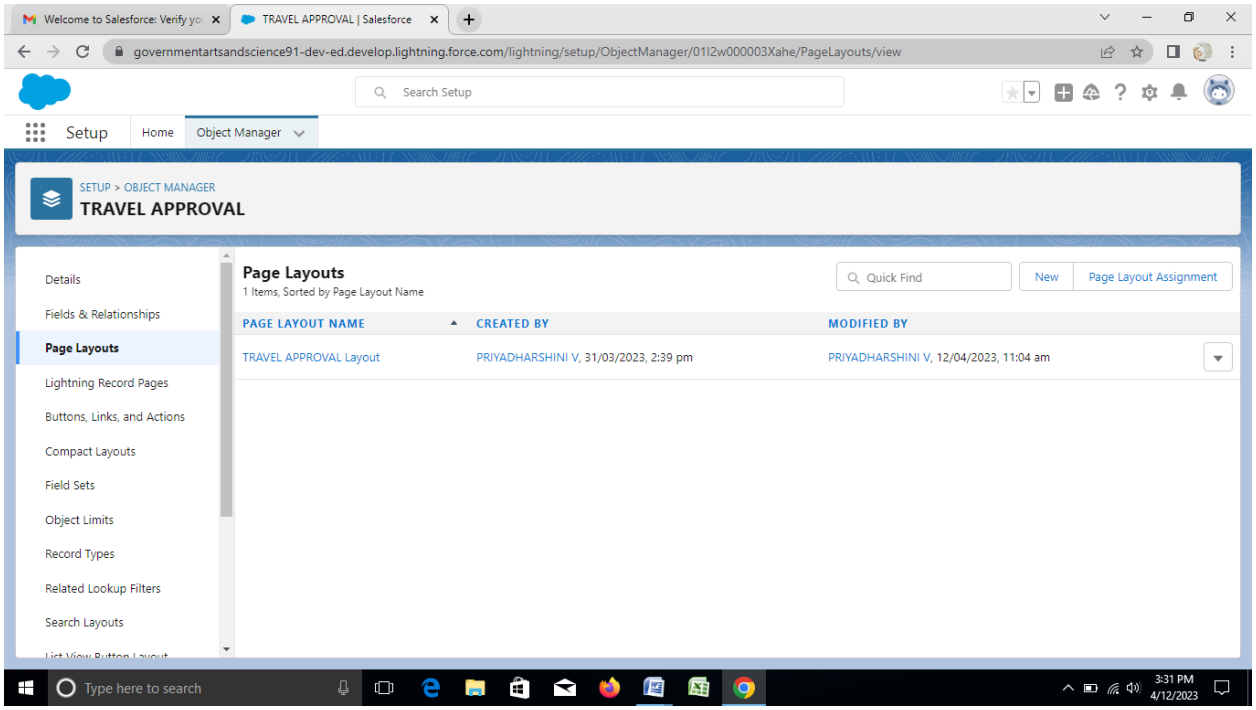
From setup click on data import or select data import wizard then launch wizard ,now upload the department. Csv which downloaded using the zip file….



CUSTOMIZE USER INTERFACE

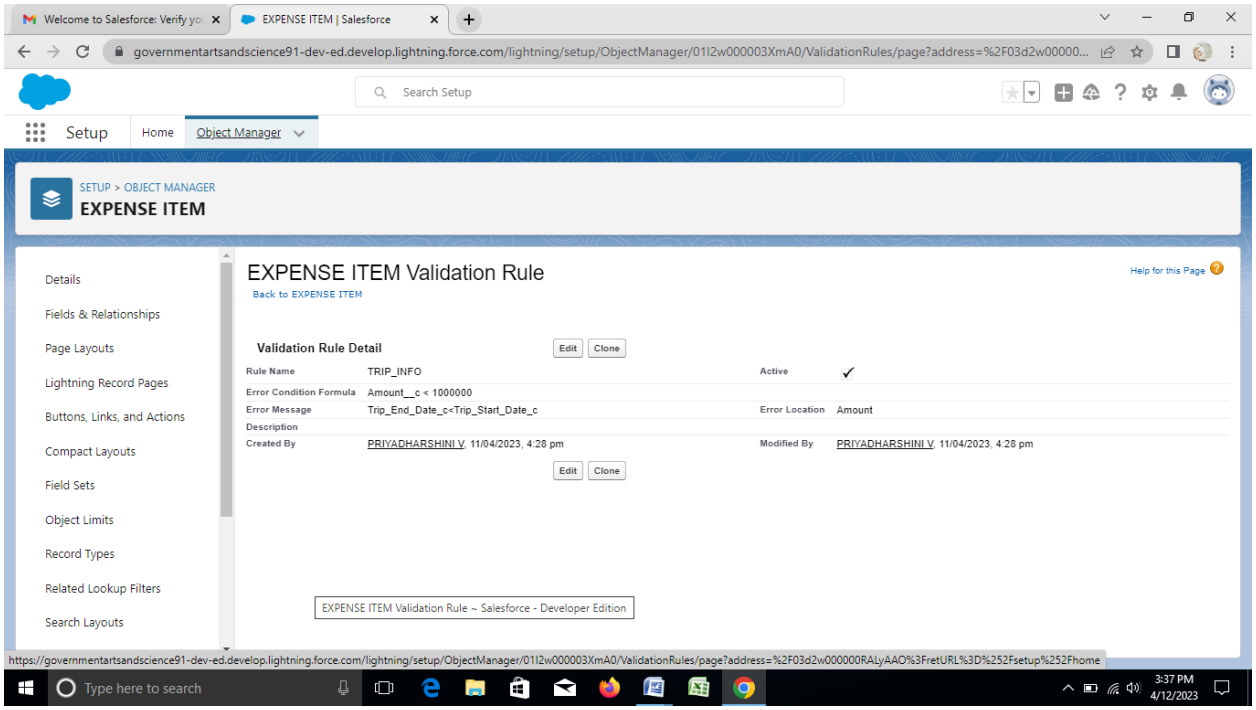


USE CUSTOMIZATION

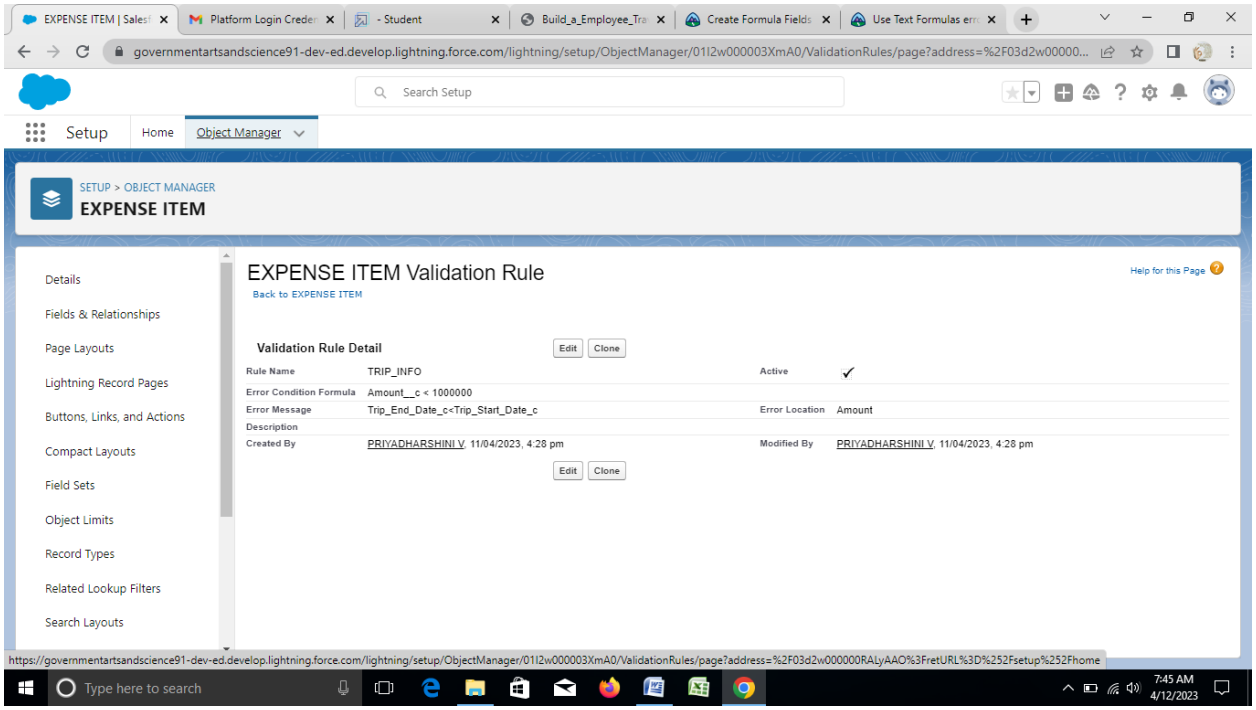


From the object manager ,search for travel approval object and click on page layouts and click edit

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



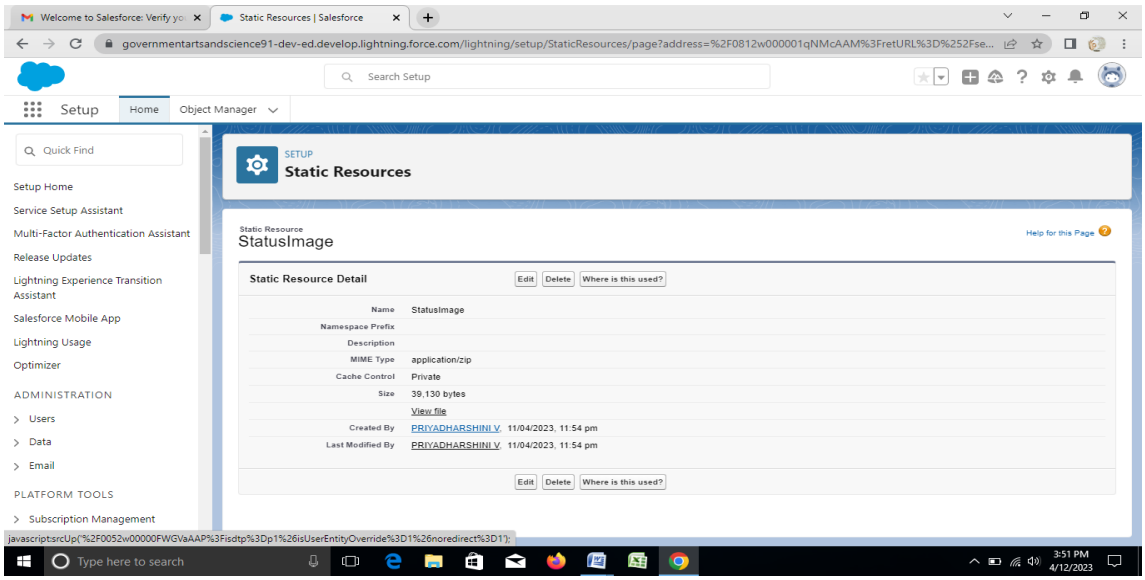
Add Business logic to travel app



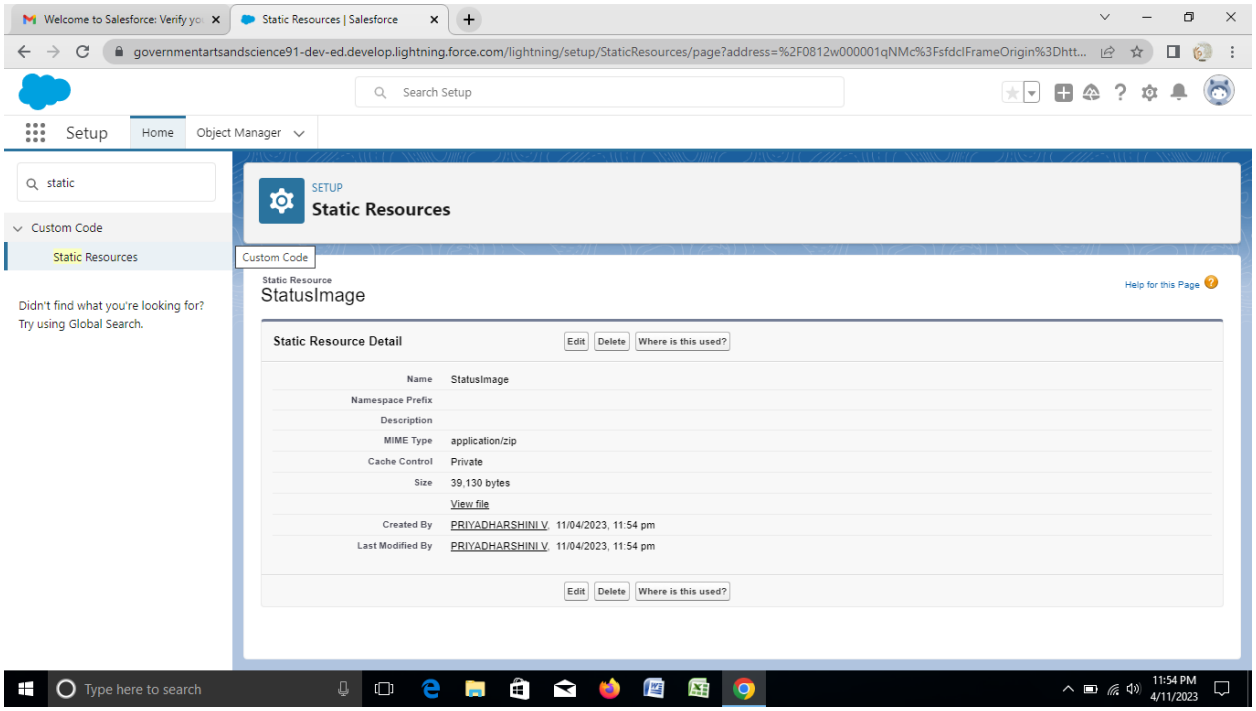
Validation rules and give your rule a name and make sure that the rule is set to active .the error condition formula enter Trip _End_Date __c<Trip _Start _Date__c

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

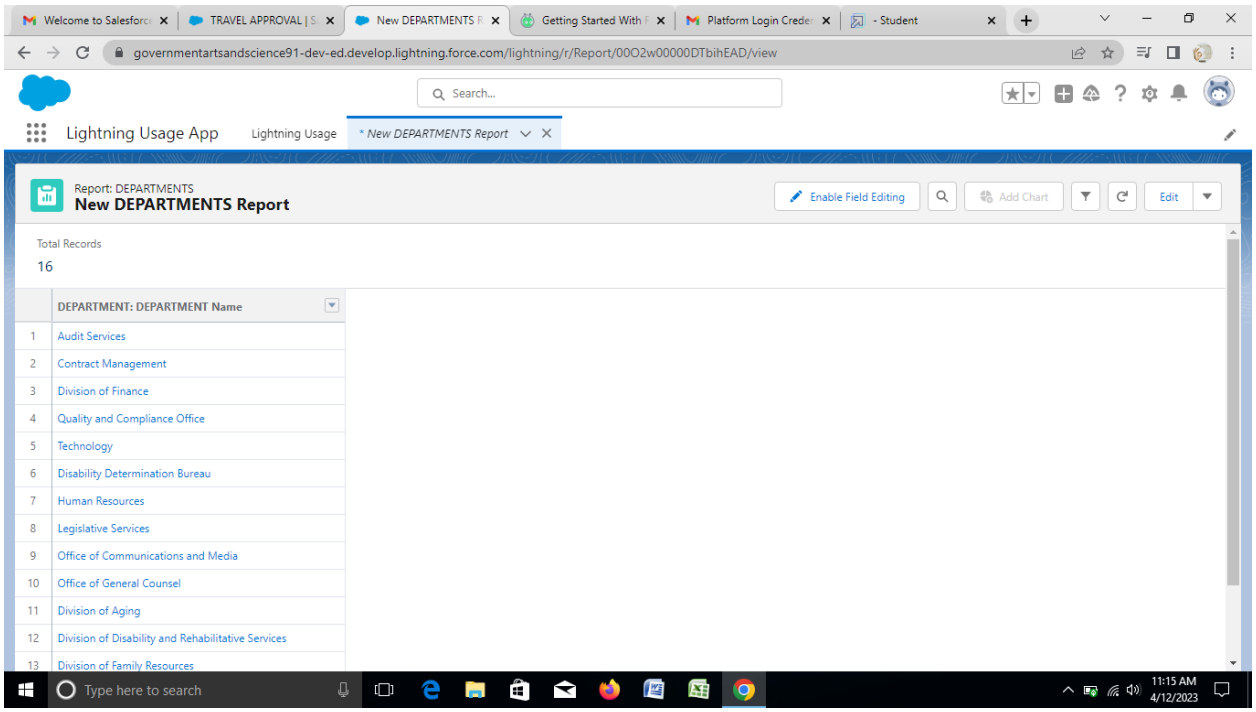
Create Roll UP Summary Field

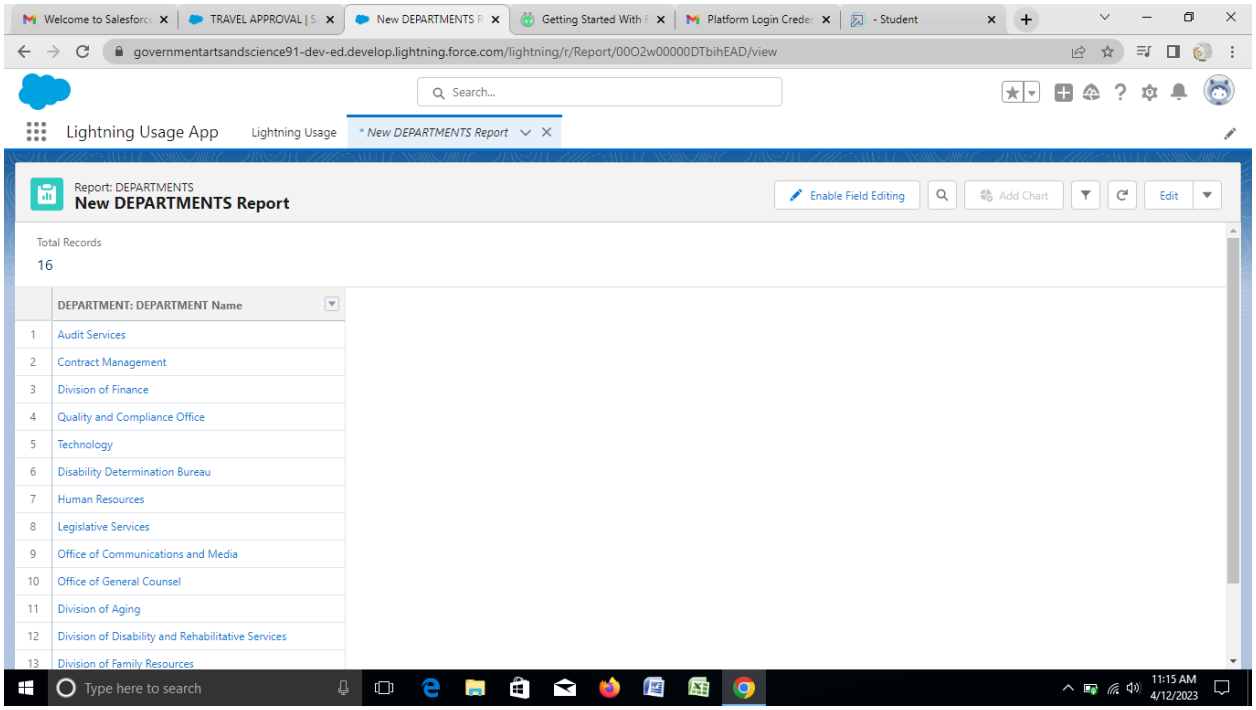


Create Formula Fields



REPORTS





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 EMPLOYE 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.