

PROJECT REPORT TEMPLATE

PROJECT TITLE:

Build An Employee Travel Approval

Application For Corporates.

TEAM LEAD:

DHIVAKAR.N

TEAM MEMBERS:

K.KARTHIKA

R.KEERTHANA

V.KURALARASAN

1

1. INTRODUCTION

1.1 Overview:

Travel is an integral part of the business world as companies need to travel to meet clients attend conference s and meetings and explore new markets however managing employee travel can be a cumbersome task for the HR and travel departments that why many corporate have started

using employed travel approval application to streamlined the process.

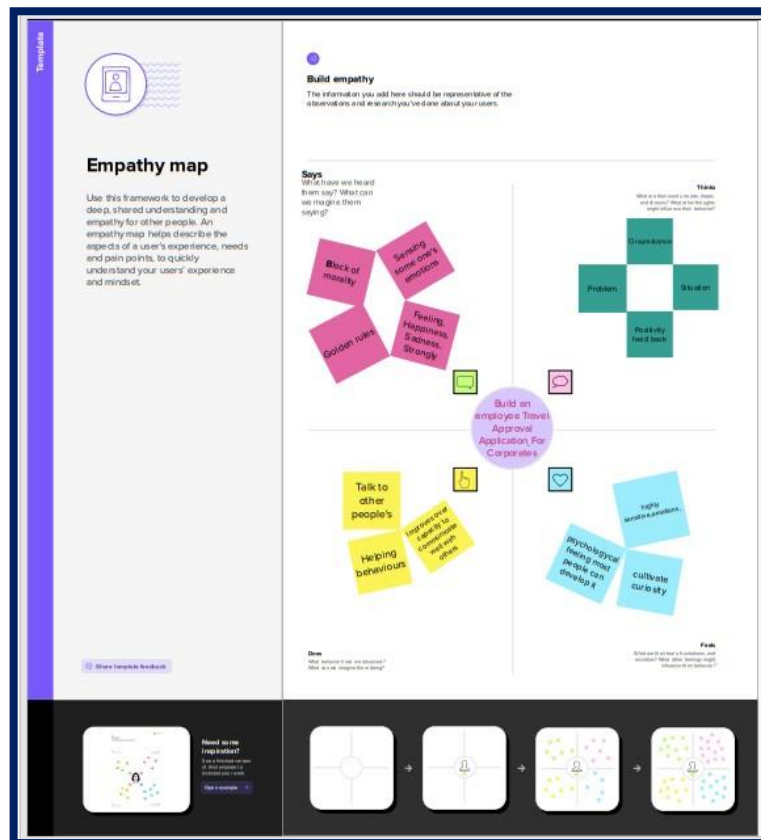
1.2 Purpose:

The application saves time for both the employee and the travel manager by automating the travel request and approval process. The application ensures that travel requests comply with the company's travel policies, which reduces the risk of non-compliant expenses and unnecessary travel.

2. PROBLEM DEFINITION AND DESIGN

THINKING:

1.3 Empathy Map:



1.4 Ideation & Brainstorming Map:



Result:

1.4 Data Model:

OBJECT NAME	FIELDS IN THE OBJECT	
	Field label	Data Type
Travel approval	Amount	Currency
	Expense Type field	Picklist
	Travel Approval field	Master-Detail relationship
	Total Expenses	Roll –up summary
Formula field	Status image	Formula
Status Indicator	STATUS INDICATOR	TEXT

3.2 Activity and Screenshot:

Salesforce:

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

1. Creating Developer Account .

You can using anything in format .

Ex: username@organization.com

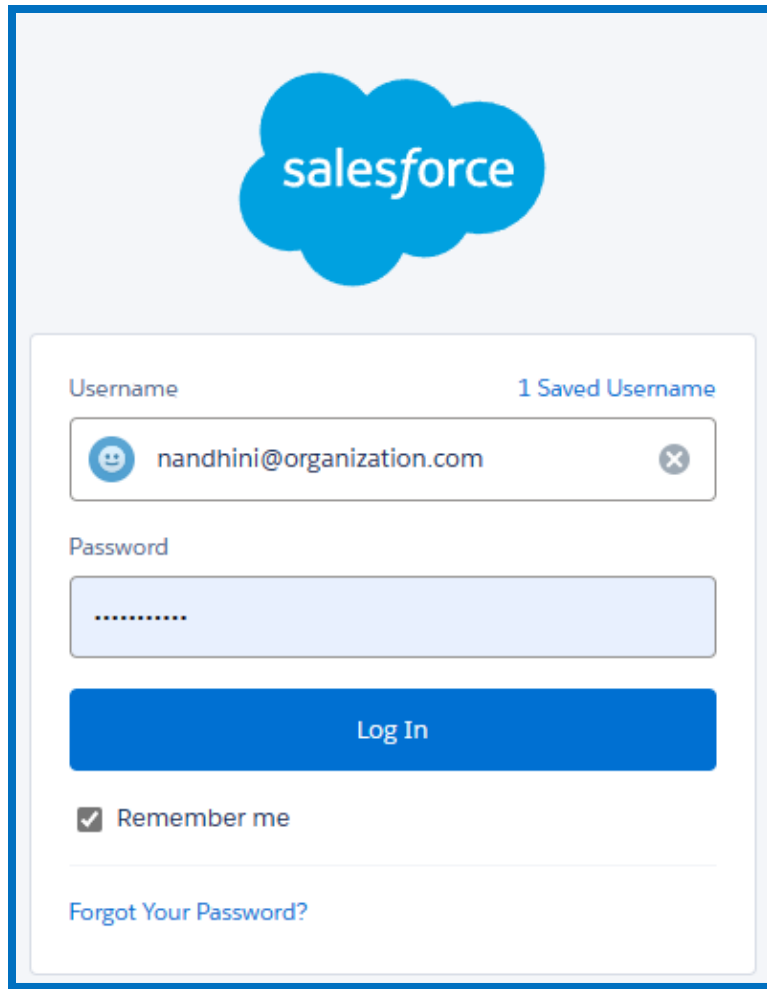
2. Account activation.

Login To Your Salesforce Account:

1.Go to salesforce.com and click on login.

2.Enter the username and password that you just created.

3.After login this is the home page which you will see

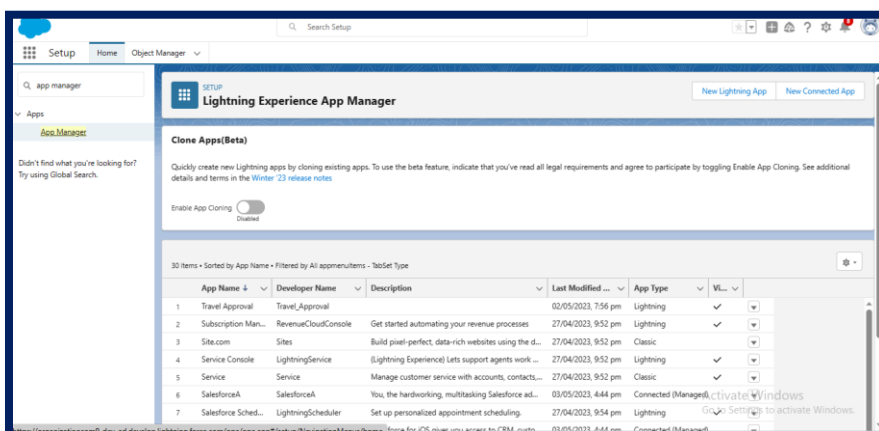


The image shows the Salesforce login interface. At the top is the Salesforce logo. Below it, there's a section for login. It includes a 'Username' field with a dropdown arrow and a '1 Saved Username' link. The username 'nandhini@organization.com' is entered. Below the username is a 'Password' field with a masked password '.....'. A blue 'Log In' button is positioned below the password field. There is a 'Remember me' checkbox which is checked. At the bottom, there is a link for 'Forgot Your Password?'.

ACTIVITY:1

Created the Travel Application:

- Click New Lightning App. Enter Travel Approval as the App Name, then click Next.



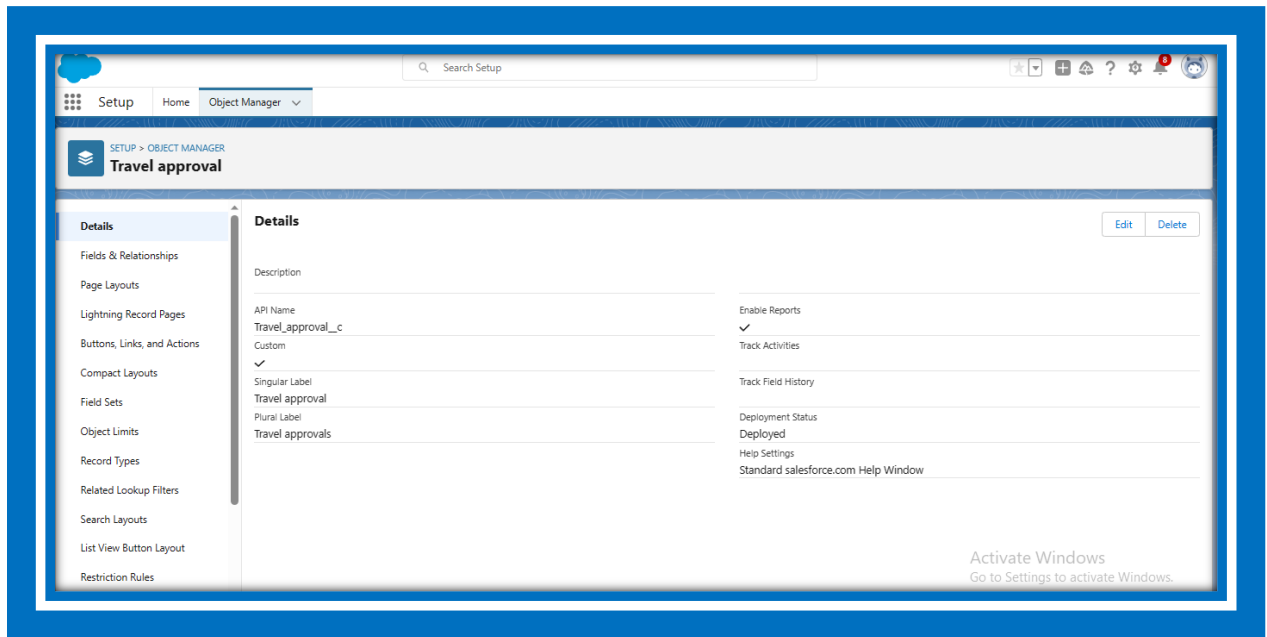
- **SUCCEFULLY CREATED AN TRAVEL APPLICATION.**

Milestone 3:

ACTIVITY 1:

Custom Object Creation:

- **CREATE THE TRAVEL APPROVAL TYPE FIELD:**



**SIMILARLY,
CREATED A DEPARTMENT OBJECT AND EXPENSE ITEM OBJECT.**

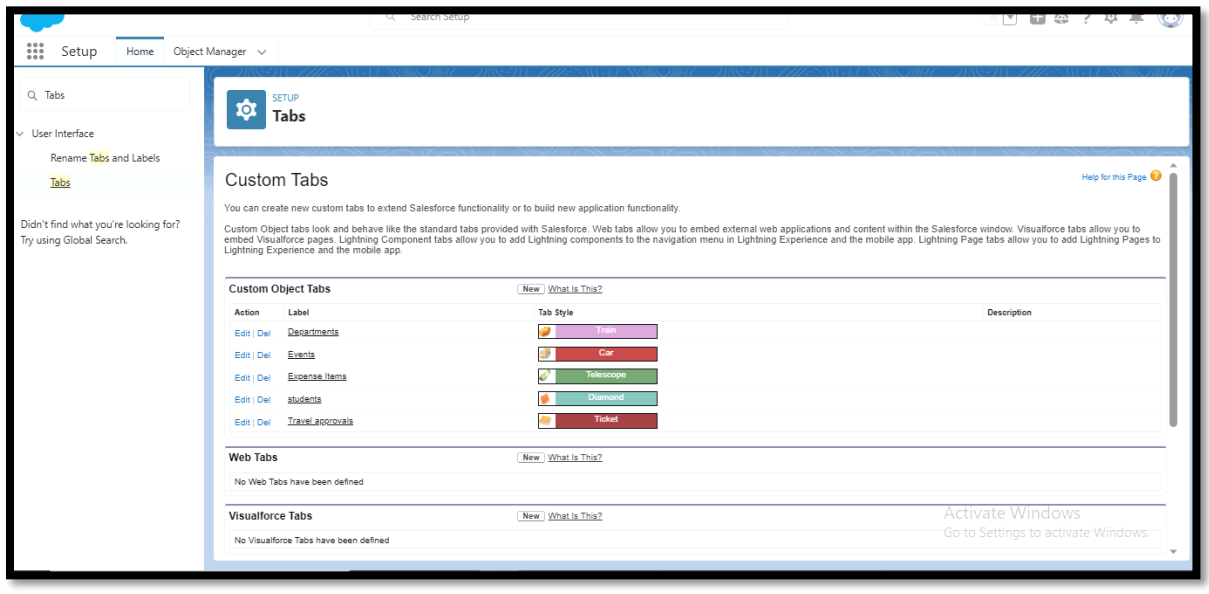
- **SUCCESSFULLY CREATED AN CUSTOME OBJECT.**

MILESTONE4:

TABS:

ACTIVITY-1:

CTREATE A CUSTOME TABS:

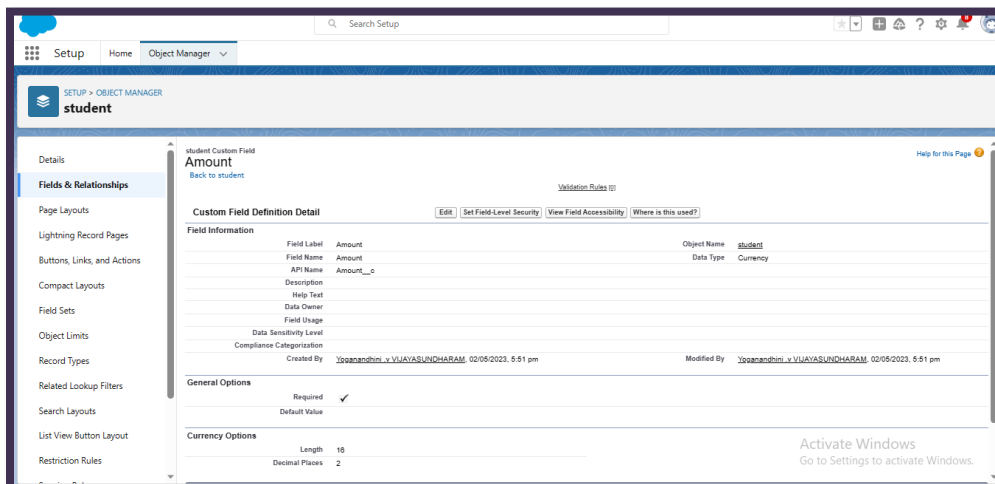


- SUCCESSFULLY CREATED AN CUSTOME TABS.

MILESTONE 4:

CREATE A FIELD AND RELATIONSHIP:

CREATE THE AMOUNT TYPE FIELD:



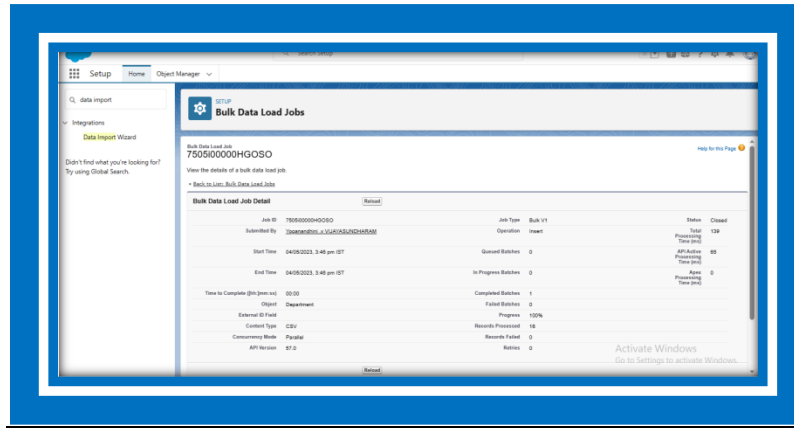
SIMILARLY,

CREATED A EXPENSE TYPE FIELD AND TRAVEL APPROVAL TYPE FIELD.

- **SUCCESSFULLY CREATED AN FIELD AND RELATIONSHIPS:**

- **MILESTONE 5:**

CREATE IMPORT DEPARTMENTS.

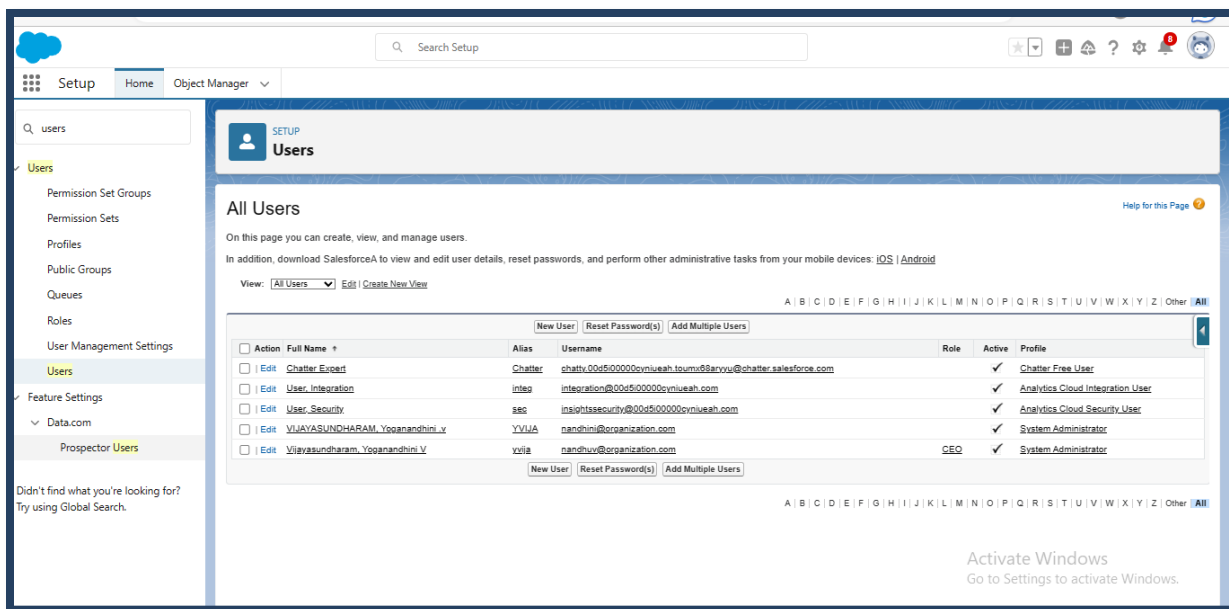


SUCCESSFULLY CREATED DEPARTMENTS.

Milestone 6-

Customize User Interface

In this Milestone we are going to setup the users, customizing the page layouts.

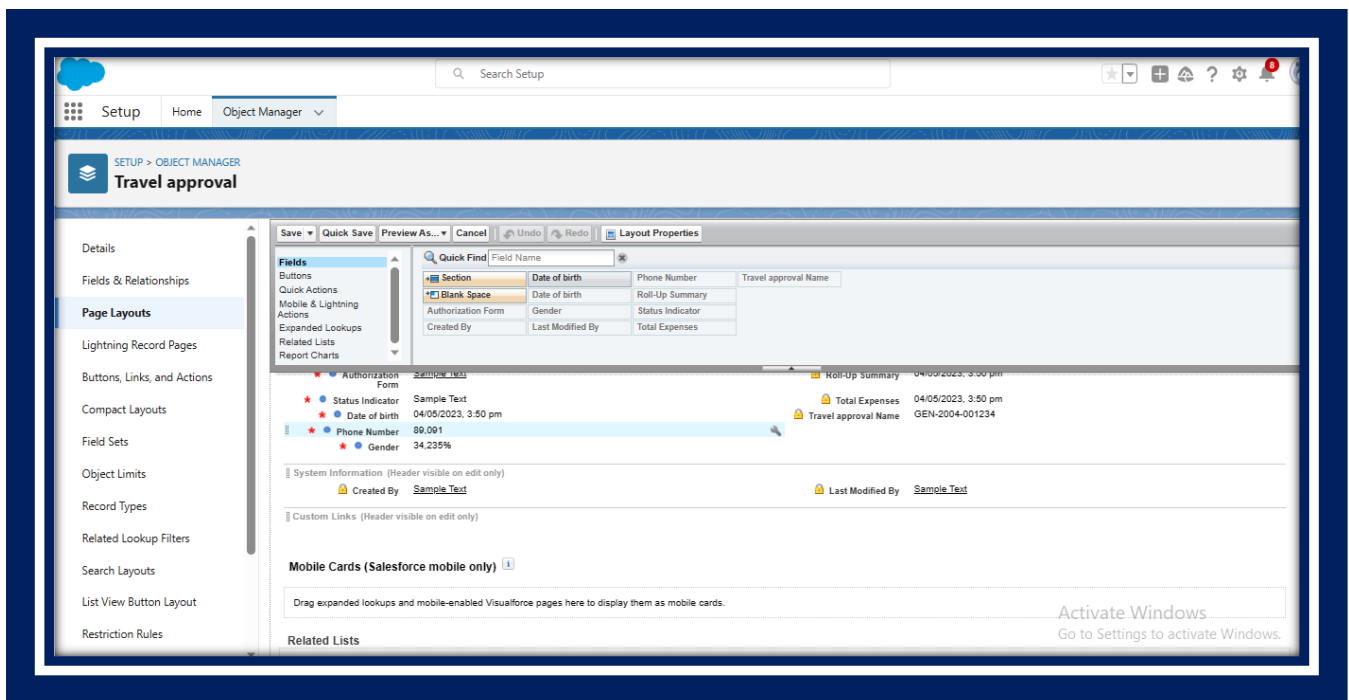


- Successfully created customize user interface

Milestone 7

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.



- **Successfully created an customization.**

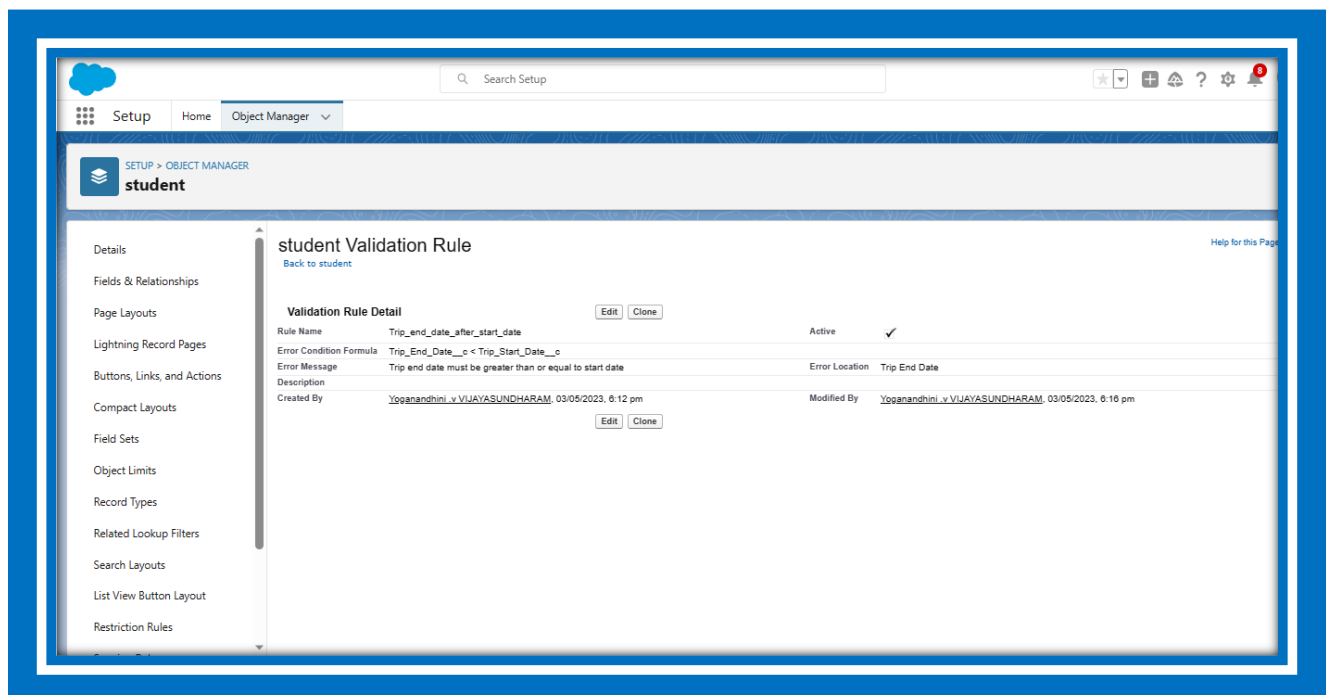
Milestone 8:

Add BUSINESS LOGIC TO TRAVEL APP

From this milestone we are going to create validation rules, rollup summary fields, formula fields, workflows and approval process.

Activity-1:

Create Validation Rule:

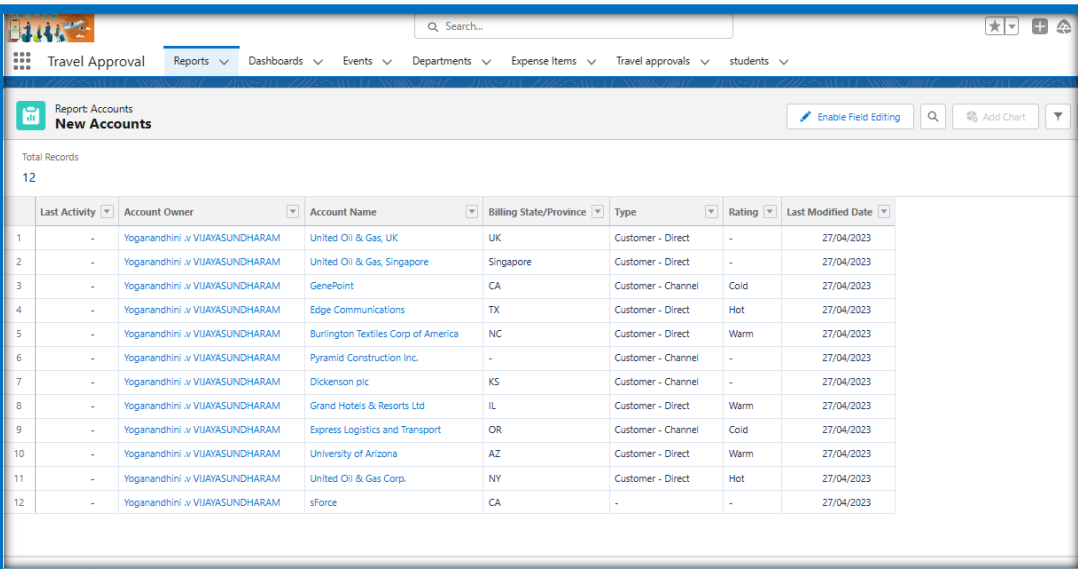


- Successfully created an business logic to travel app

MILESTONE 10:

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.



Report: Accounts
New Accounts

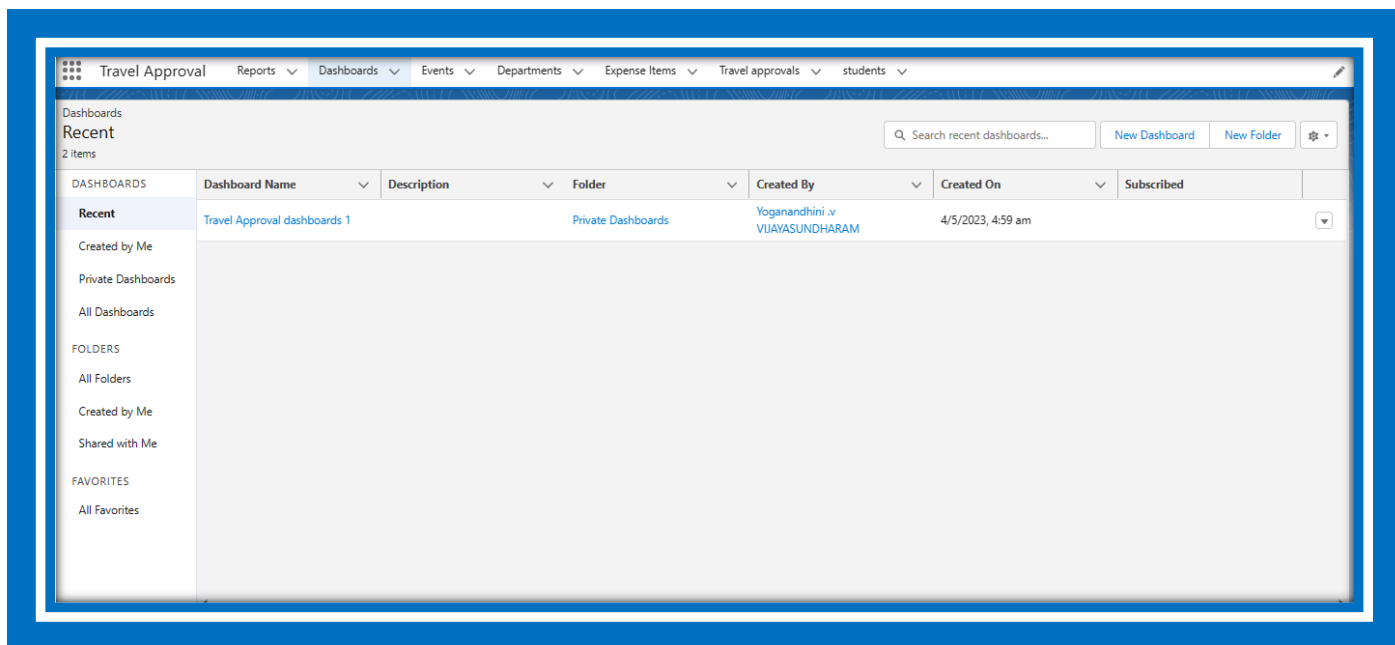
Total Records: 12

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Yoganandhini .v VJAYASUNDHARAM	United Oil & Gas, UK	UK	Customer - Direct	-	27/04/2023
2	-	Yoganandhini .v VJAYASUNDHARAM	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	27/04/2023
3	-	Yoganandhini .v VJAYASUNDHARAM	GenePoint	CA	Customer - Channel	Cold	27/04/2023
4	-	Yoganandhini .v VJAYASUNDHARAM	Edge Communications	TX	Customer - Direct	Hot	27/04/2023
5	-	Yoganandhini .v VJAYASUNDHARAM	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	27/04/2023
6	-	Yoganandhini .v VJAYASUNDHARAM	Pyramid Construction Inc.	-	Customer - Channel	-	27/04/2023
7	-	Yoganandhini .v VJAYASUNDHARAM	Dickenson plc	KS	Customer - Channel	-	27/04/2023
8	-	Yoganandhini .v VJAYASUNDHARAM	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	27/04/2023
9	-	Yoganandhini .v VJAYASUNDHARAM	Express Logistics and Transport	OR	Customer - Channel	Cold	27/04/2023
10	-	Yoganandhini .v VJAYASUNDHARAM	University of Arizona	AZ	Customer - Direct	Warm	27/04/2023
11	-	Yoganandhini .v VJAYASUNDHARAM	United Oil & Gas Corp.	NY	Customer - Direct	Hot	27/04/2023
12	-	Yoganandhini .v VJAYASUNDHARAM	sforce	CA	-	-	27/04/2023

Milestone 11

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 dashboards.



Dashboards filters make it easy for users to apply different data perspectives to a single dashboard.

4 TRAILHEAD PROFILE PUBLIC URL:

Team lead: <https://trailblazer.me/id/ddhiva3>

Team member 1-

<https://trailblazer.me/id/kravichandran31>

Team member 2-

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

Team member 3-

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

5 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 make tedious and confusing.
- regular maintenance . internet connection problem is there .
- poor connection leads to trouble and anxiety. lack of leadership.
- it can be costly sometimes .
- poor connection.

6 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 .

7 CONCLUSION:

An employee travel approval applications is a valuable tool for corporates 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.

8 FUTURE SCOPE:

- **In future it will be really a useful one in the applications of the travel approval it is trusted to be in future everyone will utilize this .**
- **The customer will set could service and make it trust worthy .**
- **Hope it put fulfil all the needs of the users.**