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. 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.
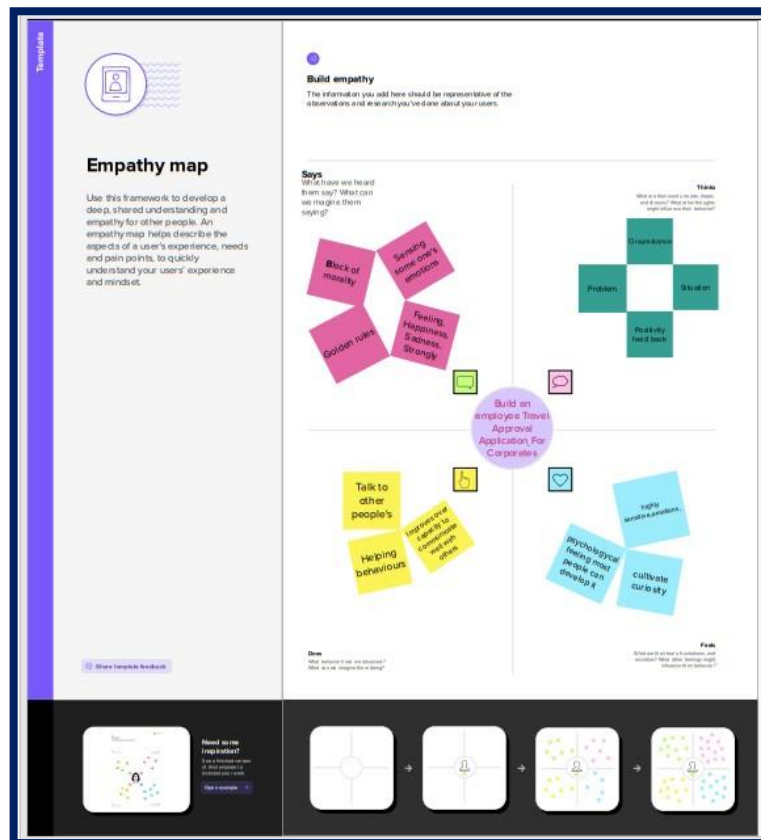
1.2 Purpose:

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 .

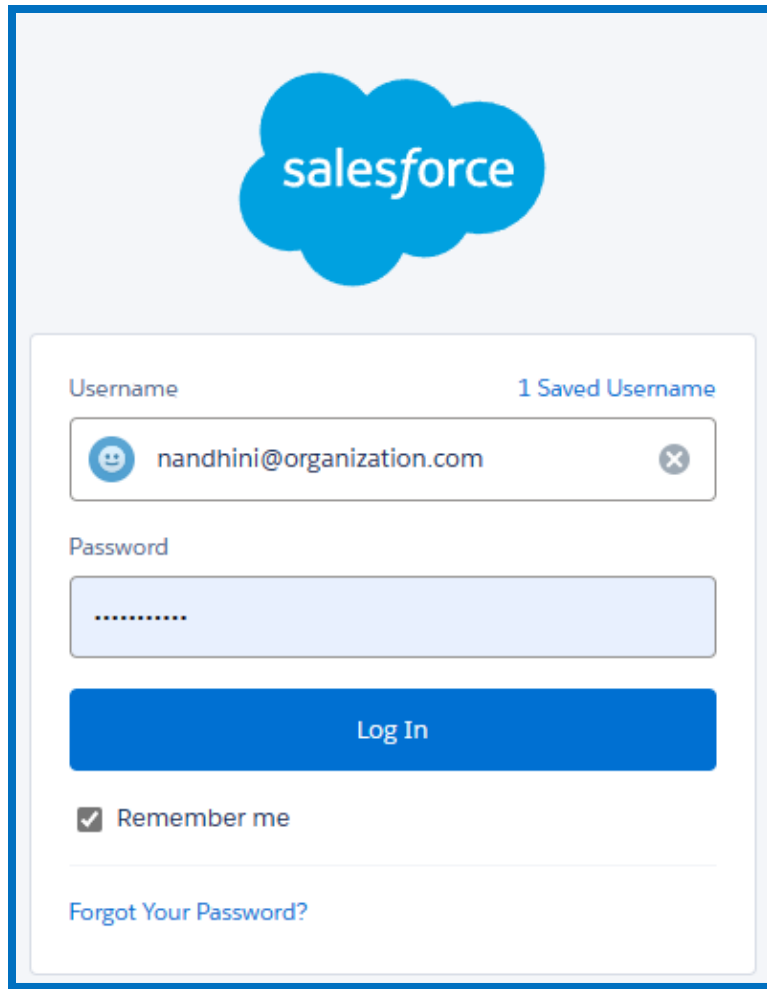   You can using anything in format .

   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

ACTIVITY:1

Created the Travel Application:

- **Click New Lightning App. Enter Travel Approval as the App Name, then click Next.**
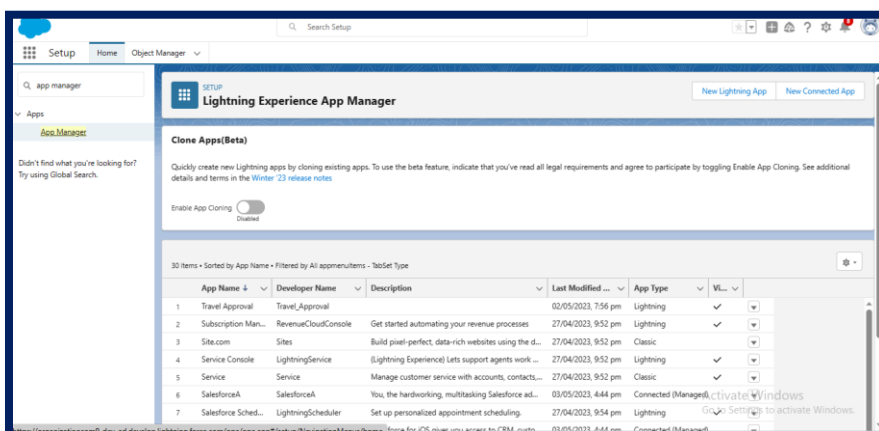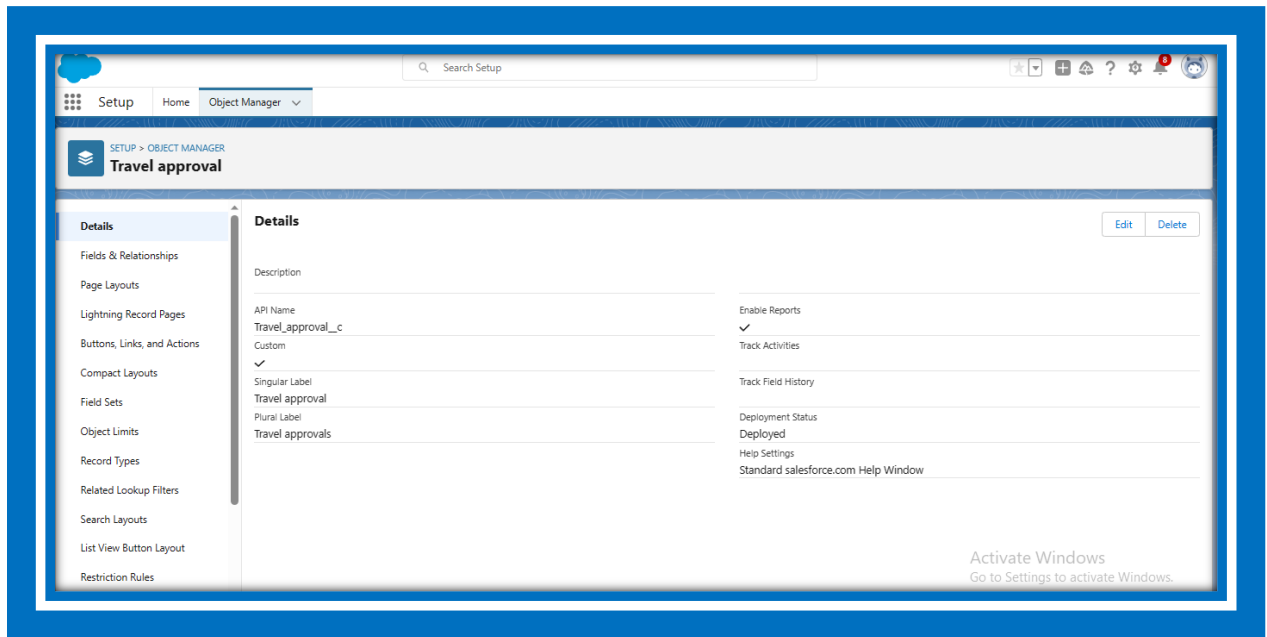
- **SUCCEFULLY CREATED AN TRAVEL APPLICATION.**

Milestone 3:

ACTIVITY 1:

Custom Object Creation:

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

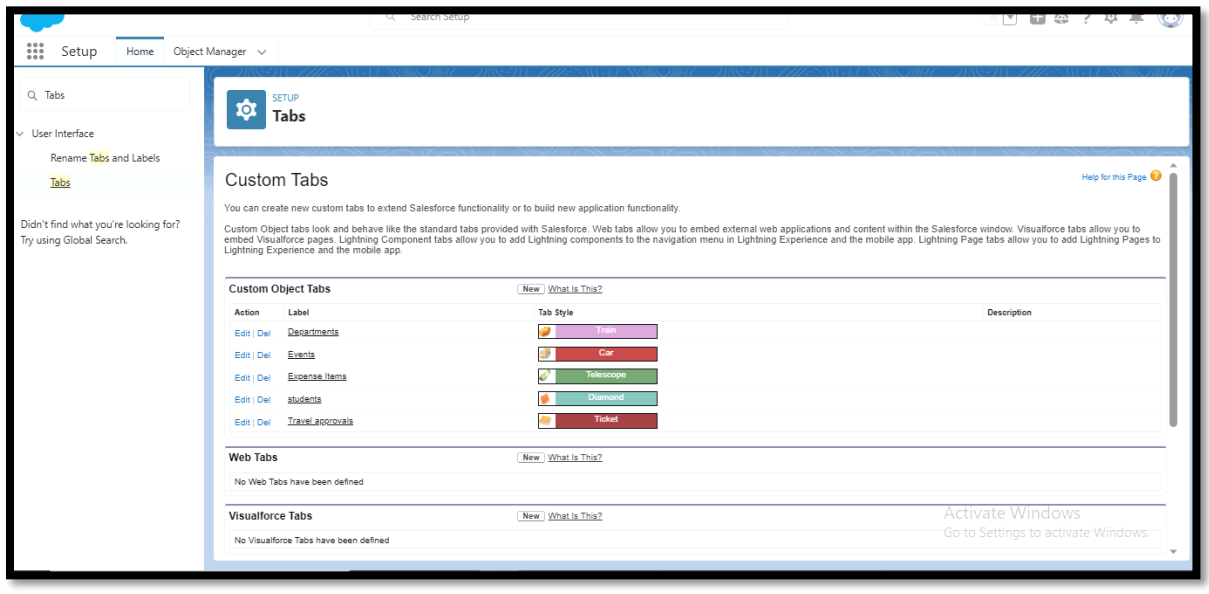SIMILARLY,
CREATED A DEPARTMENT OBJECT AND EXPENSE ITEM OBJECT.

- **SUCCESSFULLY CREATED AN CUSTOME OBJECT.**

MILESTONE4:

TABS:

ACTIVITY-1:

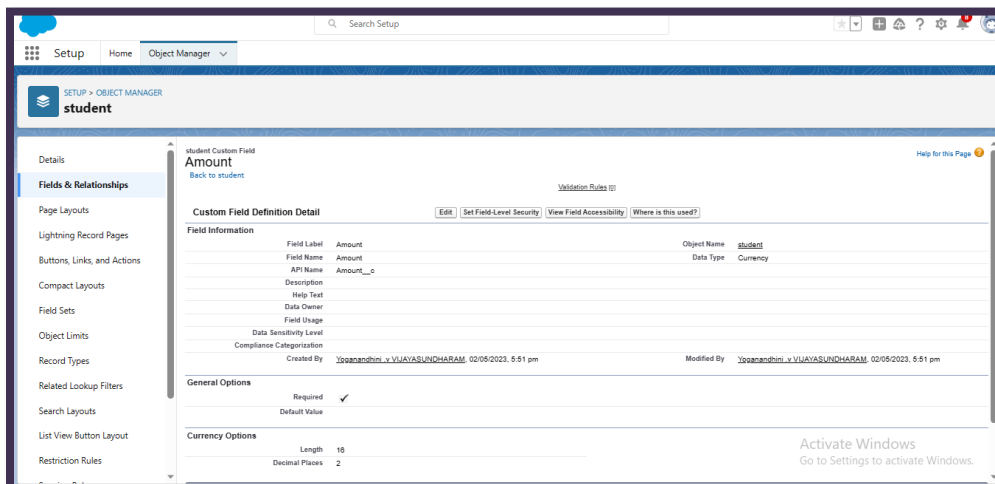# CTREATE A CUSTOME TABS:

- ## SUCCCESSFULLY CREATED AN CUSTOME TABS.

MILESTONE 4:

CREATE A FIELD AND RELATIONSHIP:
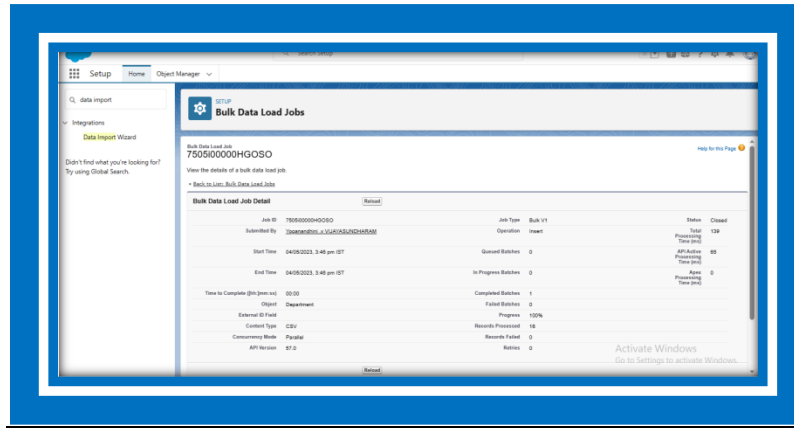
CREATE THE AMOUNT TYPE FIELD:

SIMILARLY,

CREATED A EXPENSE TYPE FIELD AND TRAVEL APPROVAL TYPE FIELD.

- ## **SUCCCESSFULLY CREATED AN FIELD AND RELATIONSHIPS:**

- ## MILESTONE 5:

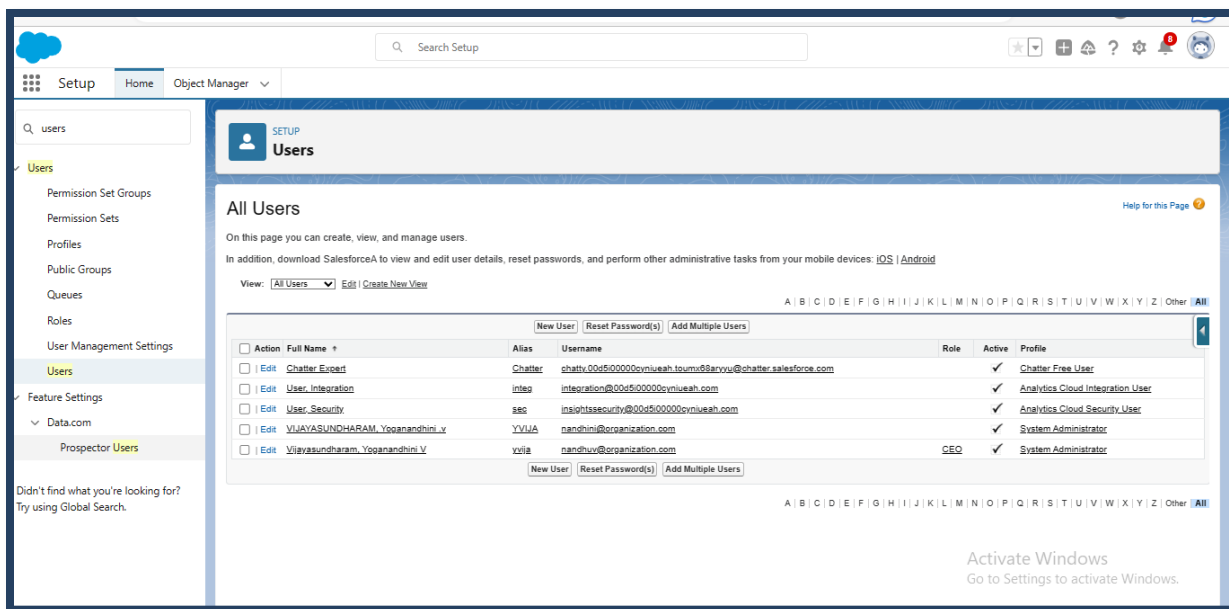### CREATE IMPORT DEPARTMENTS.

SUCCESSFULLY CREATED DEPARTMENTS.

Milestone 6-

Customize User Interface

In this Milestone we are going to setup the users, customizing the page layouts.
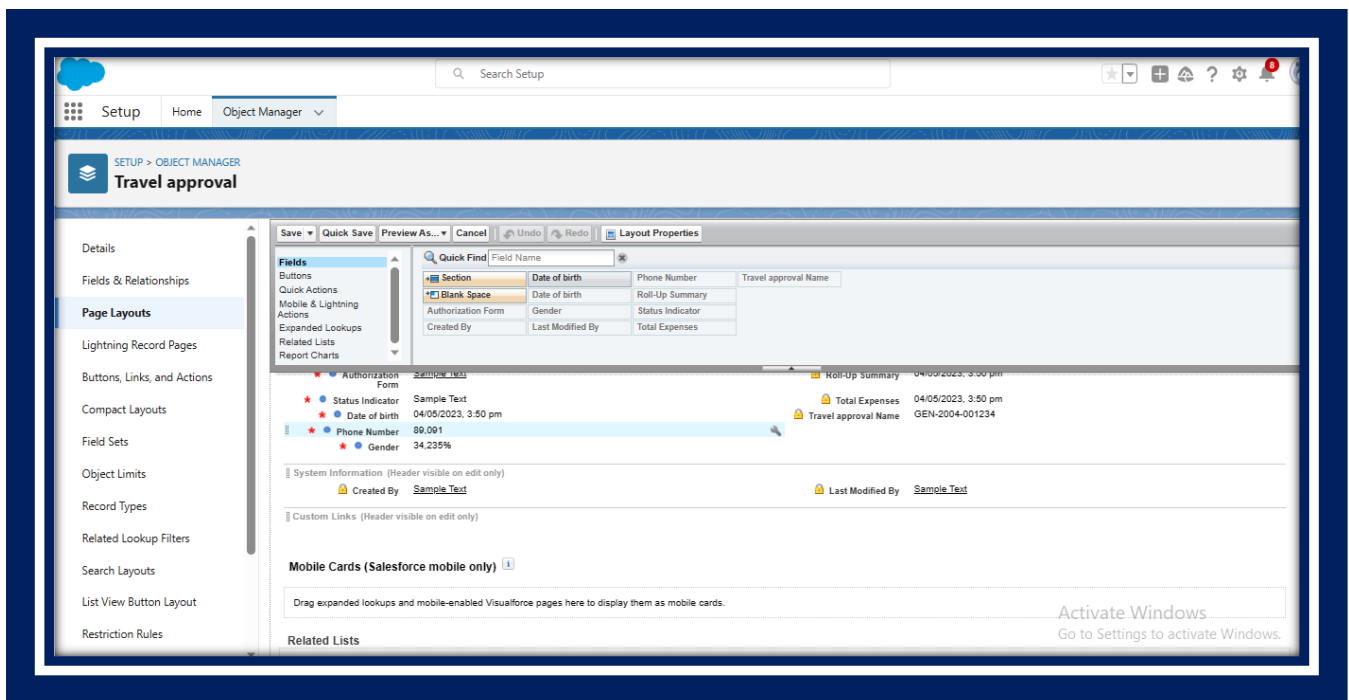
- <u>Successfully created customize user interface</u>

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.
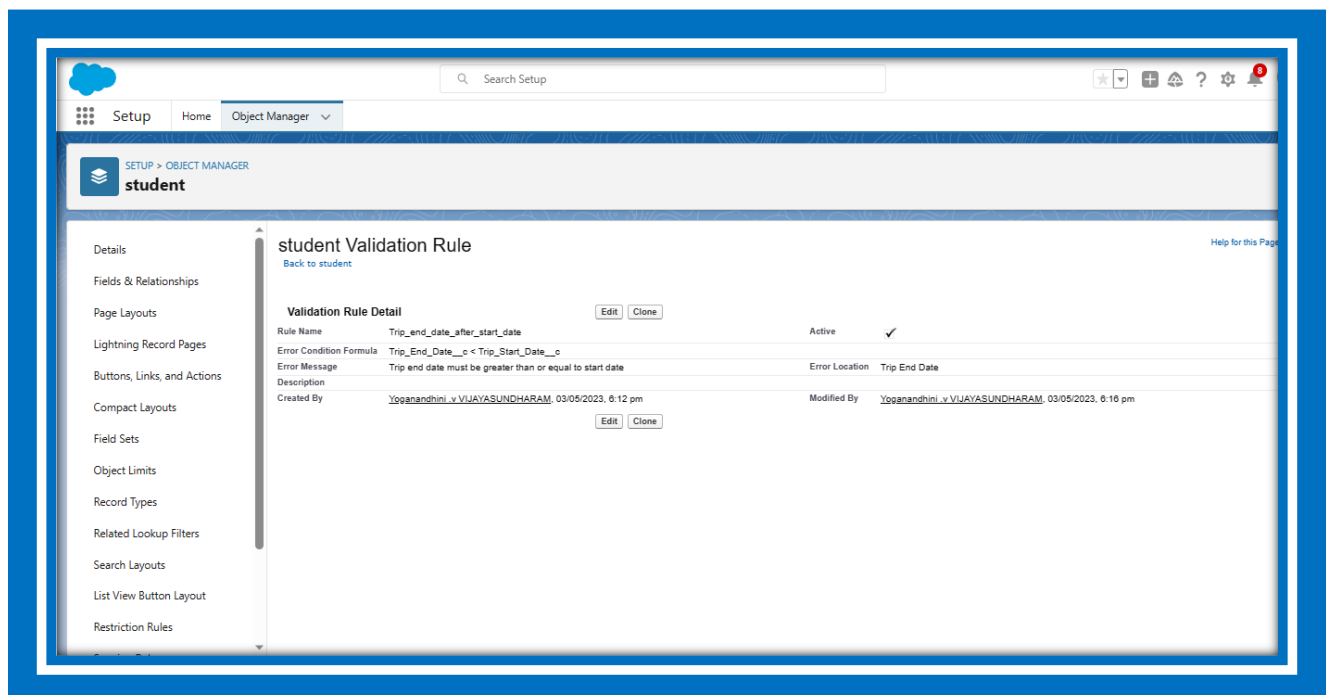
- **Successfully created an customization.**

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.

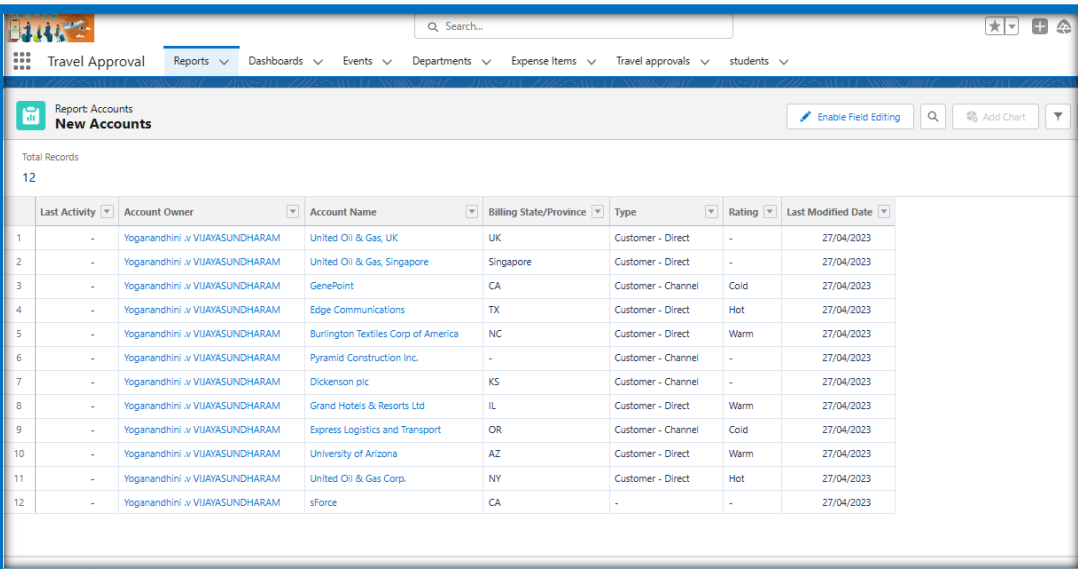**Activity-1:**

Create Validation Rule:

- **<u>Successfully created an business logic to travel app</u>**

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.
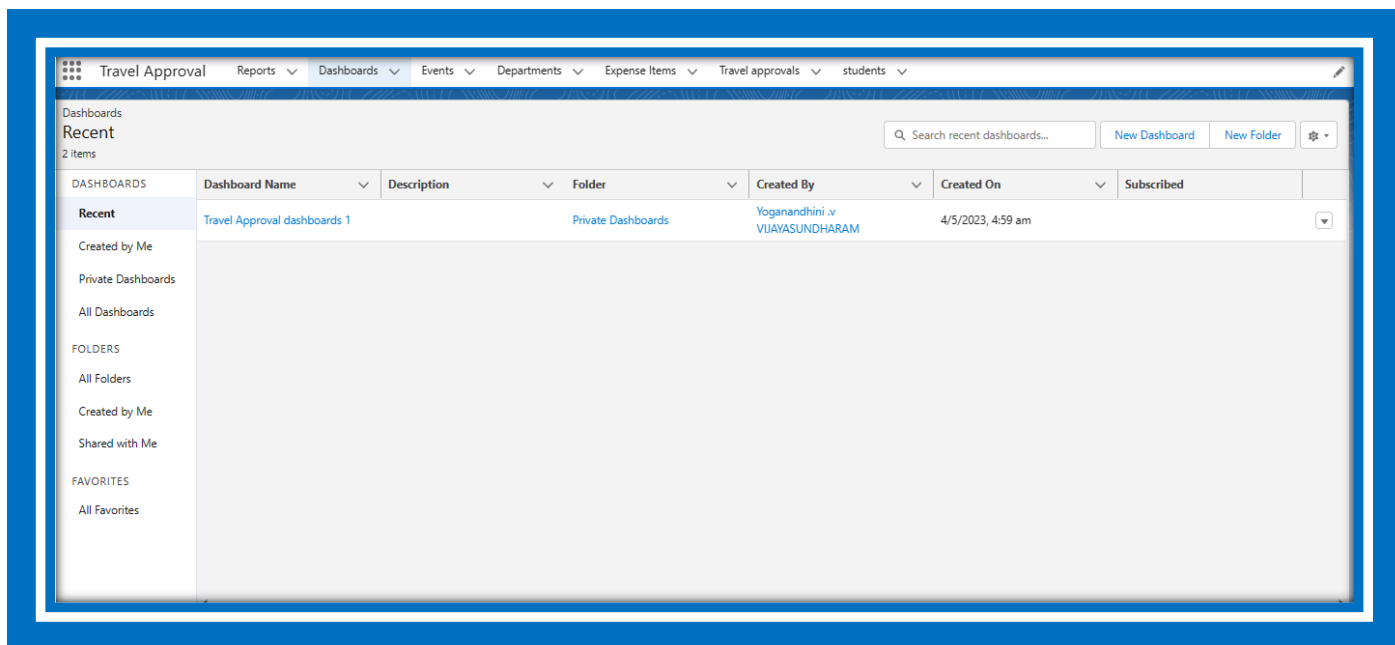

Milestone 11

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: 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 to 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 an 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 transperency 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.