

Project Report

BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

1. INTRODUCTION

1.1 Overview

This Project helps in sending the employees travel approval requests to the manager in place of emails. Travel request forms are designed to give the management to overview the intended business trip along with a cost and a strategic point of view. The fields that typically appear on a travel request form include; Employee name and contact information. Travel Approval Request App will help users quickly send a "Travel Request" through mobile using Power Apps.

The implementation types are:

- Stand-alone (not integrated with Concur Travel or Concur Expense)
- Integrated with Concur Travel (but not Concur Expense)
- Integrated with Concur Expense (but not Concur Travel)
- Integrated with Concur Travel and Concur Expense

Each type of implementation is addressed separately in this report.

1.2 Purpose

Travel takes us out of our comfort zones and inspires us to see, taste and try new things. It constantly challenges us, not only to adapt to and explore new surroundings, but also to engage with different people, to embrace adventures as they come and to share new and meaningful experiences with friends and loved ones.

so the travel approval applications can help sort out any issues during check-in at the airport or hotel and it's a simple way of helping you keep track of your travel plans. You can have these as printed copies or use one of the several Travel Planner apps or tools that you can find online.

Benefits for the travel plane

It makes travel more affordable. ...

You can pick your perfect destination and travel dates. ...

You can get to know your destination and decide what to do during your free time. ...

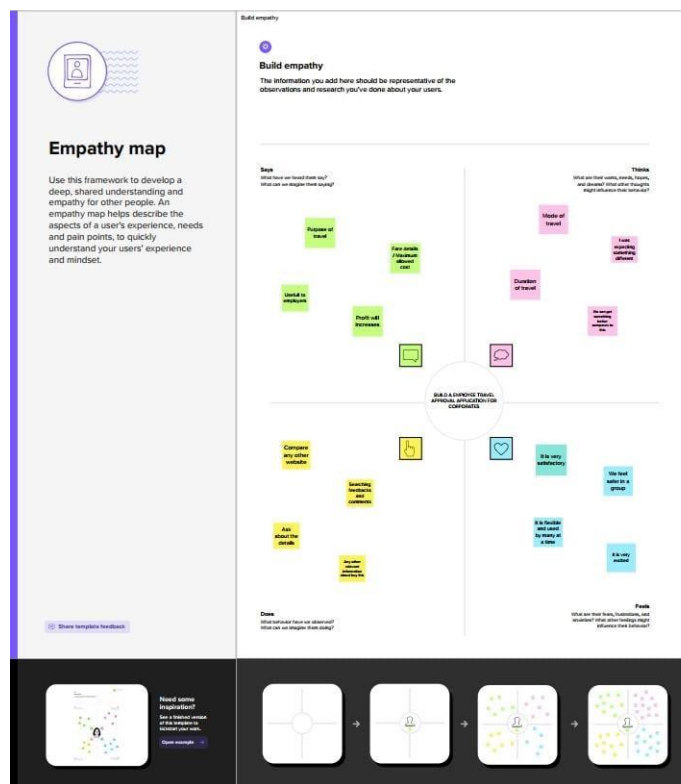
You can plan for a longer trip. ...

You can score cheaper flights. ...

You can get access to special events.

2. Problem definition & Design thinking

2.1 Empathy map



2.2 Ideation & Brainstorming map



3. Result

During this section, the source of knowledge methods of collection, the upgradation of the prevailing system and therefore the organization structure of the system problem are showcase. It includes some methods which were utilized in order to realize the intent of the project, particular requirements for execution of the project and an extended explanation of why such methods were used for implementing the proposed system, also included may be a brief description of the current time system.

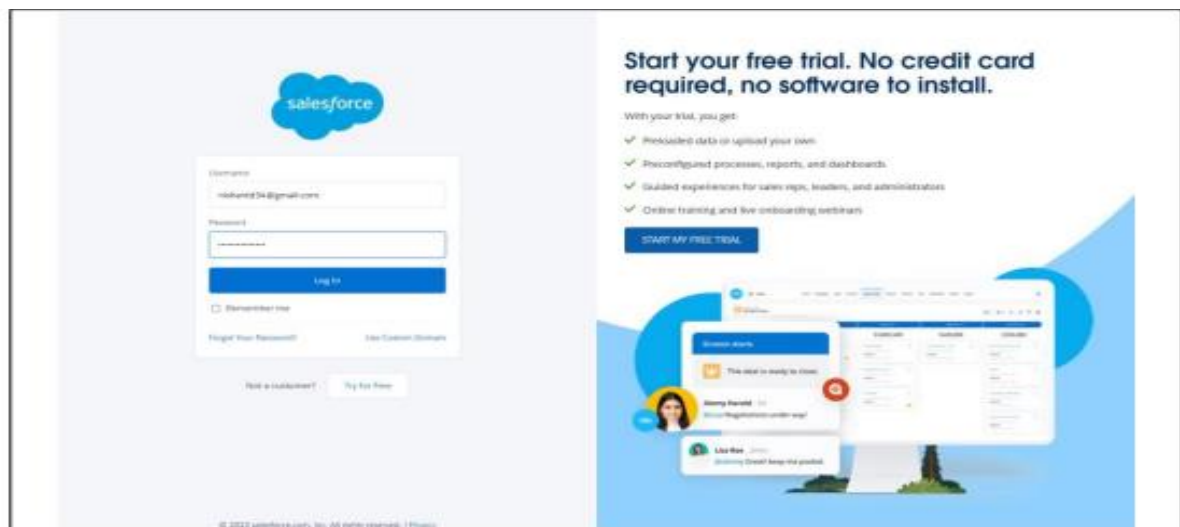


Figure 1: Login Page

3.1 Data model


Object name	Fields in the Object	
Department	Field lable	Data type
	Amount	Currency
Travel approval	Field lable	Data type
	Travel approval	Master-detail relationship
Expense item	Field lable	Data type
	Expense item	Roll_up summary

3.2 Screenshots of my project activities







The screenshot shows the Lightning Experience App Manager interface. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled "Lightning Experience App Manager" and includes a search bar and buttons for "New Lightning App" and "New Connected App". Below this, there is a section for "Clone Apps(Beta)" with a toggle switch for "Enable App Cloning" (currently disabled). A table lists 21 items, sorted by App Name, filtered by All app menu items, and TabSet Type. The table columns are App Name, Developer Name, Description, Last Modified, App Type, and Visibility.

	App Name	Developer Name	Description	Last Modified	App Type	Visibility
9	Lightning Usage A...	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	04/04/2023, 1:49 p...	Lightning	✓
10	Marketing	Marketing	Best-in-class on-demand marketing automation	04/04/2023, 1:49 p...	Classic	✓
11	Platform	Platform	The fundamental Lightning Platform	04/04/2023, 1:49 p...	Classic	✓
12	Queue Management	QueueManagement	Create and manage queues for your business.	04/04/2023, 1:49 p...	Lightning	✓
13	Sales	Sales	The world's most popular sales force automation (SFA) solut...	04/04/2023, 1:49 p...	Classic	✓
14	Sales	LightningSales	Manage your sales process with accounts, leads, opportunit...	04/04/2023, 1:52 pm	Lightning	✓
15	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple rec...	04/04/2023, 1:49 p...	Lightning	✓

The screenshot shows the "New Lightning App" wizard. The left sidebar lists various assets: Assets, Async Operation Logs, Authorization Form, Authorization Form Consent, Authorization Form Data Use, Authorization Form Text, Awards, Background Operations, Business Brands, and Calendar. The main content area is titled "New Lightning App" and shows "No items selected". At the bottom, there is a progress bar with four steps, and "Back" and "Next" buttons.



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

New customer object

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

Details

Description

API Name

New_customer_object__c

Custom

✓

Singular Label

New customer object

Plural Label

New customer objects

Enable Reports

✓

Track Activities

Track Field History


Deployment Status

Deployed







Help Settings

Standard salesforce.com Help Window

EditDelete



Search Setup



SetupHomeObject Manager

Quick Find

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

SETUP

Tabs

Analytics Studio (standard__Insights)

Sales Console (standard__LightningSalesConsole)

Service Console (standard__LightningService)

Sales (standard__LightningSales)

Lightning Usage App (standard__LightningInstrumentation)

Digital Experiences (standard__SalesforceCMS)

Queue Management (standard__QueueManagement)

Data Manager (standard__DataManager)

Subscription Management (standard__RevenueCloudConsole)

Salesforce Scheduler Setup (standard__LightningScheduler)

Bolt Solutions (standard__LightningBolt)

Travel Approval (GAYU270403)

✓ Append tab to users' existing personal customizations

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Student Name	Name	Text(80)		✓
Travel approval	Travel_approval__c	Master-Detail(Travel approval)		✓
values	values__c	Picklist		

4. Trailhead profile public URL

Team lead: Girija.R - <https://trailblazer.me/id/pgirijar>

Team members

1. Kaviya.A - <http://trailblazer.me/id/kavi02>
- 2.
2. Narmatha.N - <https://trailblazer.me/id/ptm-narmatha>
3. Ranjini.v - <http://trailblazer.me/id/ranjv13>

5. Advantages & disadvantages

Advantages

- Approvals on time. The entire process of planning and managing a trip is a long and stressful process. ...
- Customize approval workflows. The approval process can differ from company to company. ...
- Increase compliance and reduce costs. ...
- Faster process.
- Business travel is a great way to develop new skills and refine existing ones. From public speaking, adaptability, time management, networking, and best of all, confidence the knowledge and skills built with business travel are essential to a successful career.

Disadvantages

Failing to partner with TMCs

Inefficient & inconsistent T& E management

Failing to adopt travel-based management technology

6. Application

The Travel Support System (this is the name that you can see on the screen when executing the application) is a small sample application for NaturalONE. As a sample application, its focus is to show NaturalONE functionality rather than being a full-fledged travel support application.

The Travel Support System (TSS) allows you to request and approve business trips. Flights, hotels and even more external information such as cell phone expenses or car rentals can be entered with the trip request. For the destination, weather information can be queried. A manager can do both, request own trips as well as approve trips that have been requested by employees. After the manager has approved single or multiple requests, the manager can print an itinerary or receive the itinerary as a PDF file.

7. Conclusion

Here we've presented the look of a travel Approval Application on the Salesforce Platform which might provide the users with the specified travel assistant and also for the upper authorities to require care of the expenses at any point of your time through multilevel approvals of the travel request. Here the user can upload the bills to the cloud any time which is more efficient and productive. Travel Approval Application allows us to arrange and monitor travel plans and expense reports for our organization using Salesforce Platform. When it makes all the difference in closing and winning of any deal, this app provides you that perfect solution as a manager to timely approve the request and monitor travel plans and expenses for our organization, making them more efficient to use.

8. Future scope

- Apex developing tools.
- Using self-developed classes and triggers
- Using Flows and Screens
- Using visual force pages to develop proper HTML websites and custom HTML pages.
- Data analytics could even be implemented for smoother and prompt reports

Thank you