

## INTRODUCTION:

### **1.1 OVERVIEW;**

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.

### **1.2 PURPOSE**

The first and foremost thing that one must consider while creating a travel request approval workflow is where your employees will be requesting for funds. By educating the employees about the medium through which they will be requesting the fund, you can simplify the process

- 2 Next, ensure employees provide the information that is needed to request funds
- 3 Once the request is raised the managers will go through the requests raised by the employees to approve or reject the funds
- 4 Define the time the finance team will take to transfer the funds. Also, you can mention the processing time
- 5 Mention the account to which the money will be sent

## Empathy Mapping

As a main user segment for the future app, I decided to choose people, who prefer to travel with a group of friends, as potentially they can travel alone and with their families as well. To gain a deeper insight into the future app user's behavior, I have created an Empathy Map.



## 2.2 IDEATION & BRAINSTORMING MAP



## 3.1 DATA MODEL :

Object Name	Fields in the Object	
Obj 1	Field label	Data type
	Travel Approval	Auto Number
	Travel Approval	Auto Number
Obj 2	Field label	Data type
	Total Expenses	Roll- up summary
	Status Indicator	Text

## 3.2 ACTIVITY & SCREENSHOT

MILESTONE :1

ACTIVITY:1

**er can print an itinerary or receive the itinerary as a PDF file. 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 manag**

**The usage of the travel approval application is described bel**

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jane@company.sandbox

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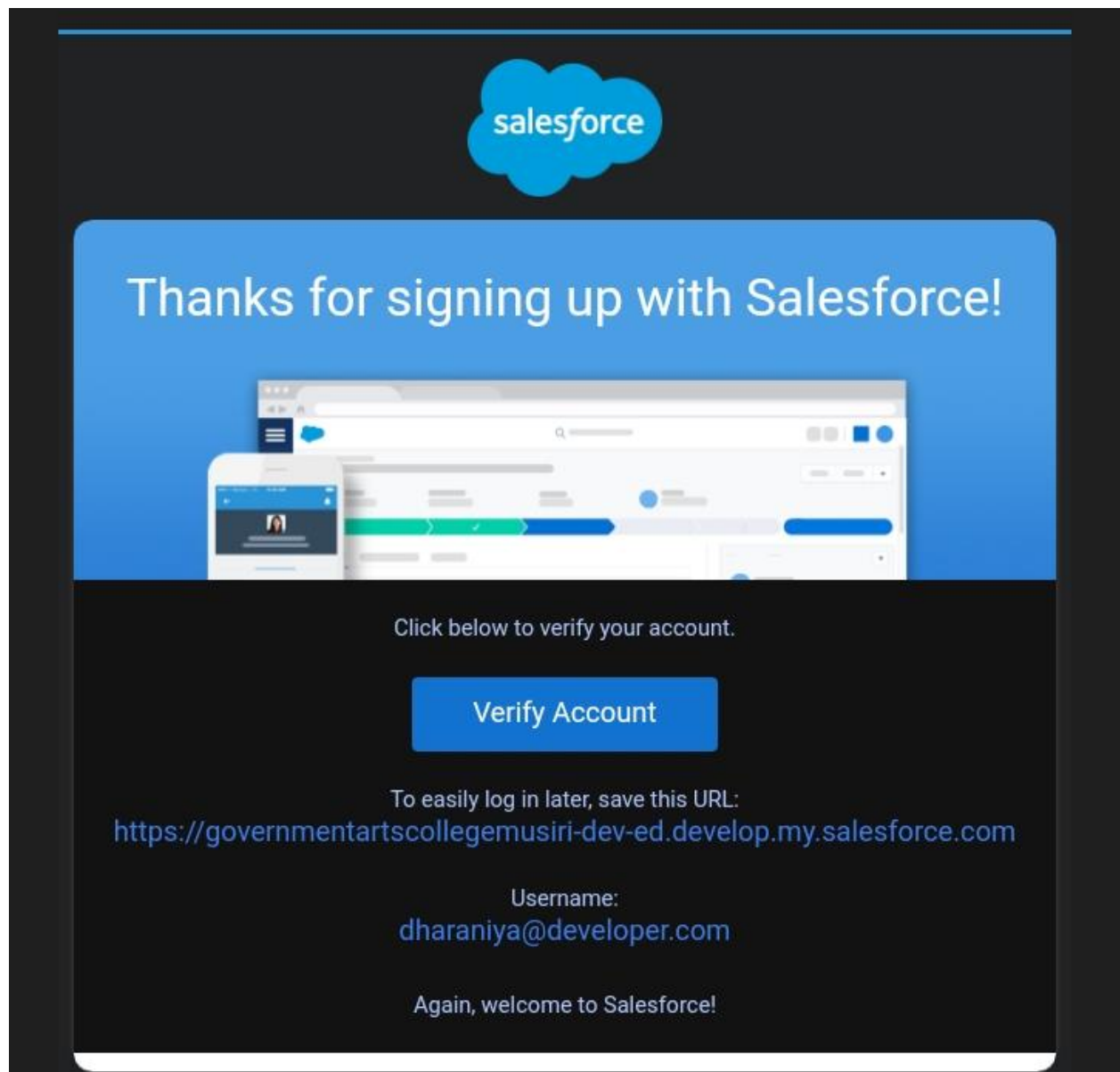
By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#).

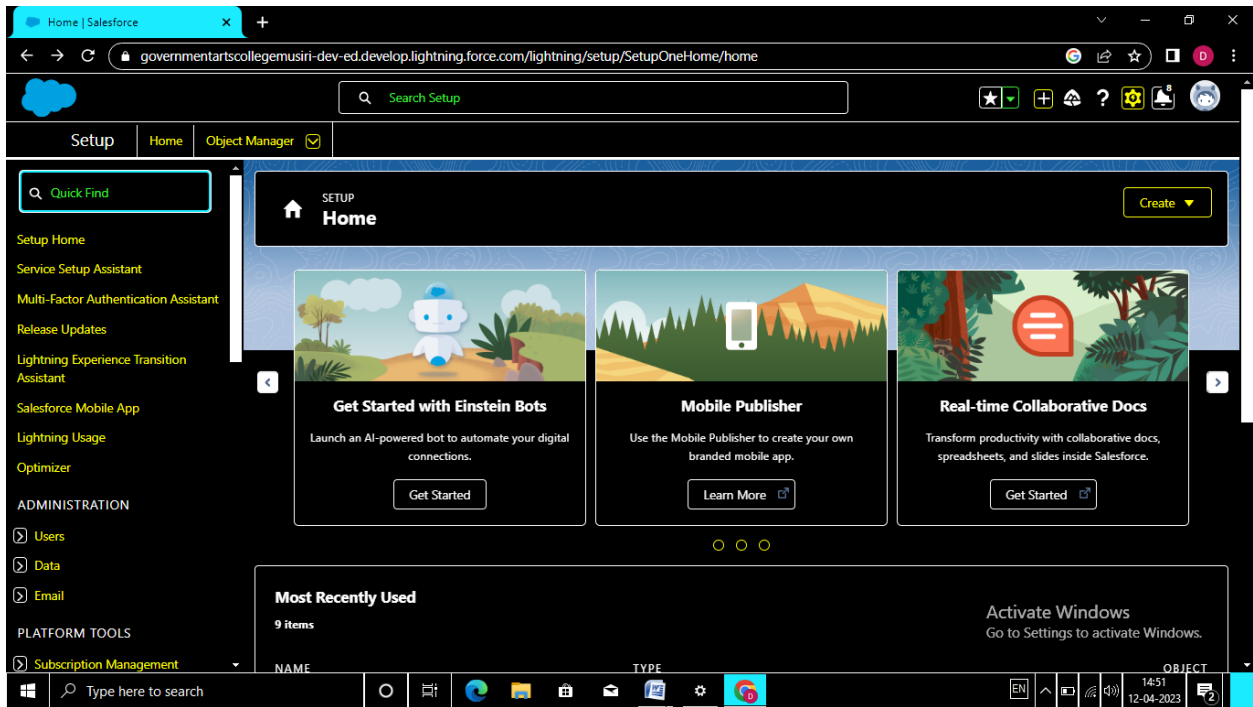
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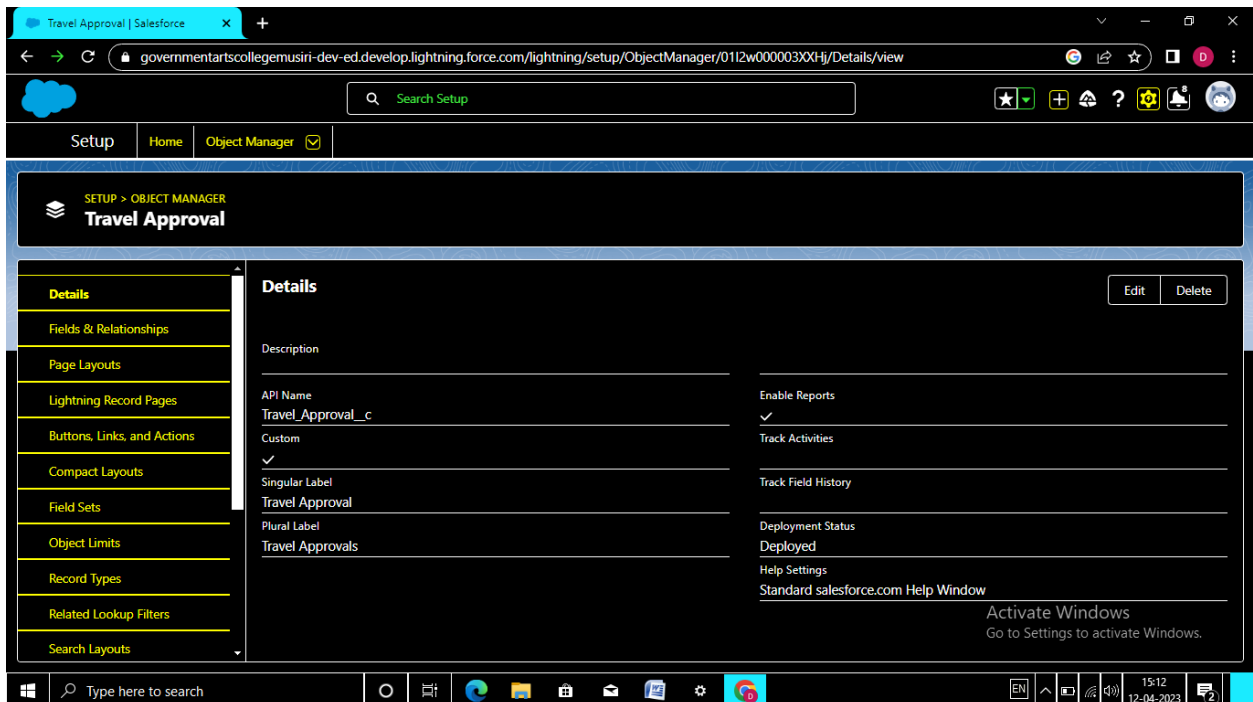
## ACTIVITY : 2





MILESTONE: 2

ACTIVITY: 1





## MILESTONE: 3

### ACTIVITY : 1

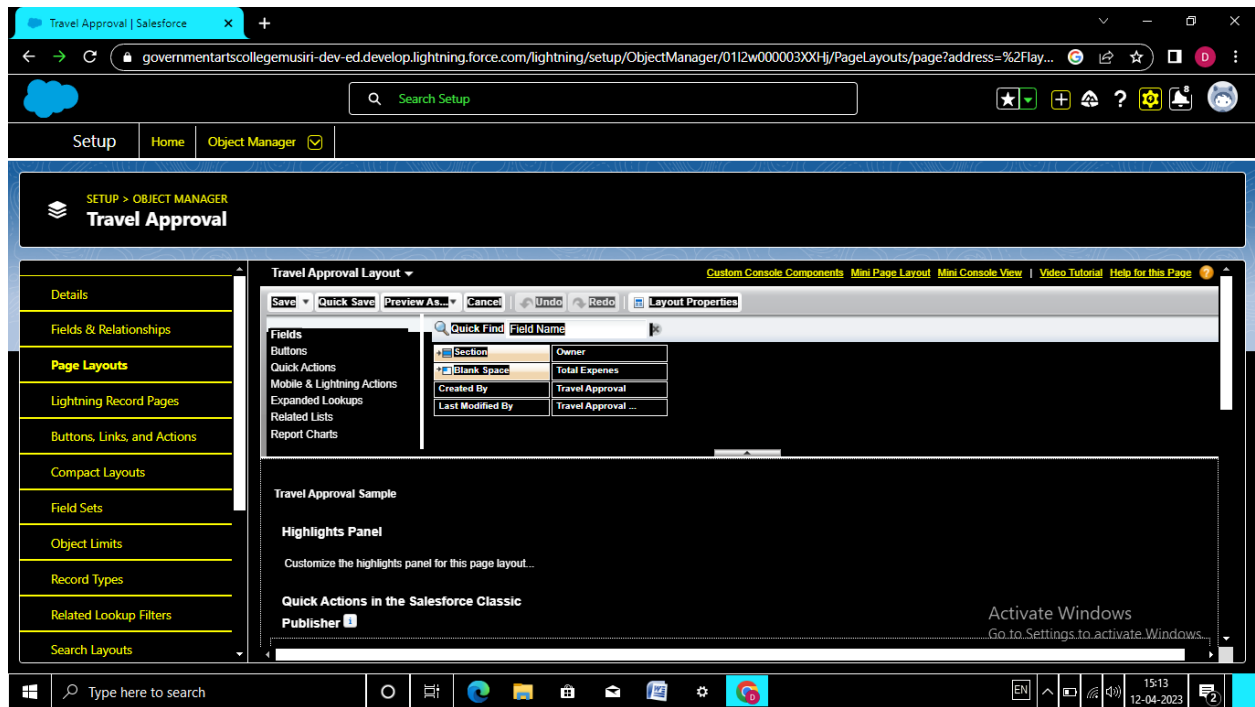
The screenshot shows the Salesforce Setup interface for a custom field named 'Travel Approval'. The browser address bar indicates the URL: `governmentartscollegemusiri-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XXHj/FieldsAndRelationships/page?addre...`. The page title is 'SETUP > OBJECT MANAGER Travel Approval'. A left sidebar contains navigation links: Details, Fields & Relationships (selected), 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 'Travel Approval Custom Field' and includes a 'Back to Travel Approval' link. It features tabs for 'Custom Field Definition Detail' (selected), 'Validation Rules (0)', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays the following details:

Field Label	Travel Approval	Object Name	Travel Approval
Field Name	Travel_Approval	Data Type	Currency
API Name	Travel_Approval__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	R.Dharaniya R.Dharaniya, 29/03/2023, 4:49 pm	Modified By	R.Dharaniya R.Dharaniya, 29/03/2023, 4:49 pm

The 'General Options' section shows the 'Required' checkbox is unchecked. At the bottom, there is a message: 'Activate Windows. Go to Settings to activate Windows.'

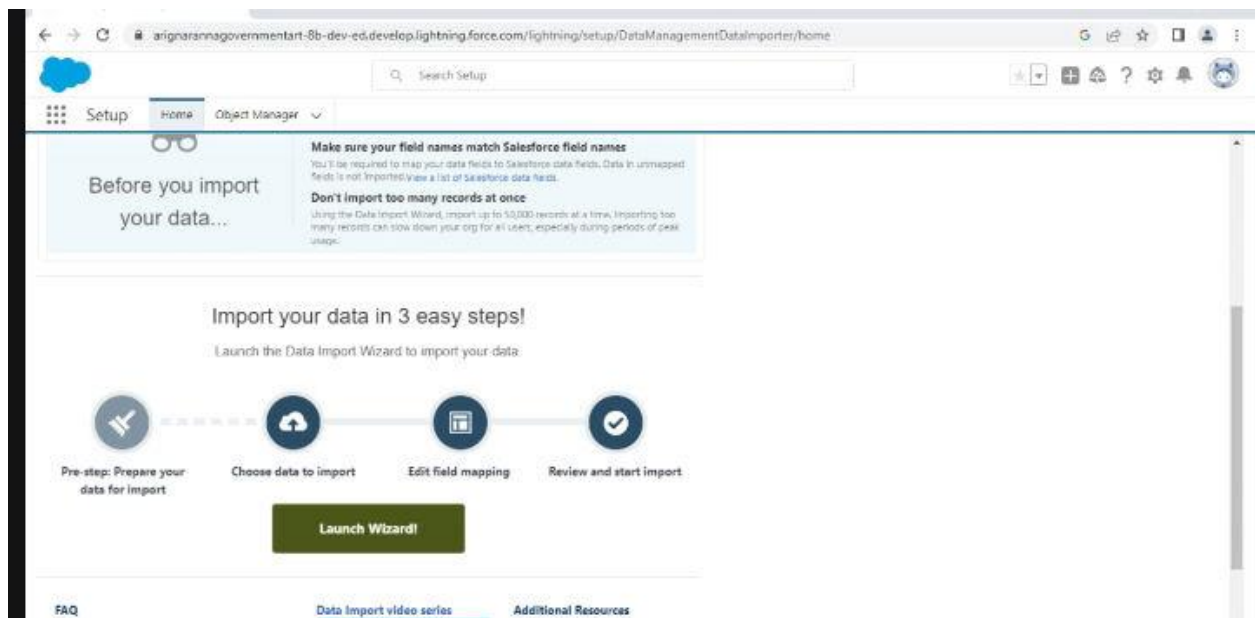
## MILESTONE: 4

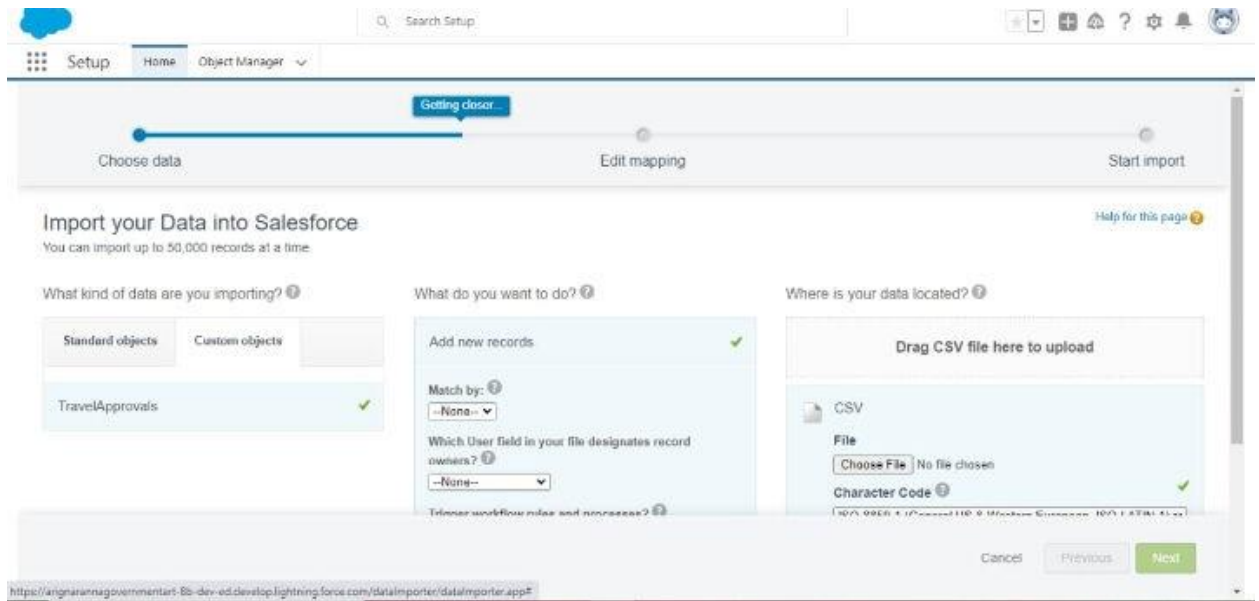
## ACTIVITY:1



## MILESTONE 5

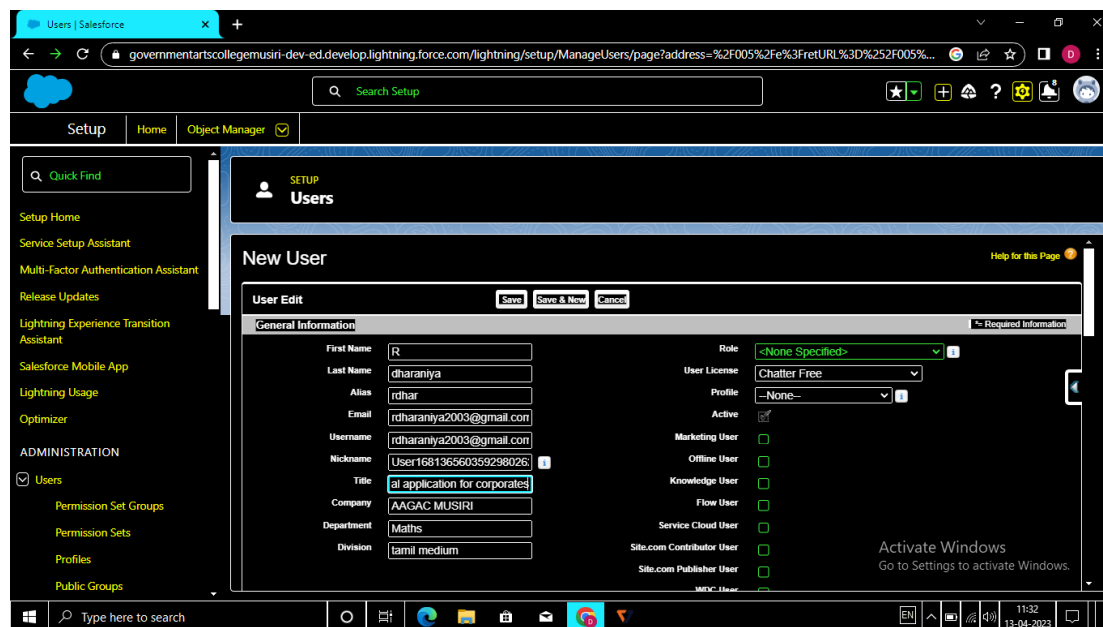
### ACTIVITY 1





## MILESTONE 6

### ACTIVITY 1



Home | Salesforce

governmentartscollegemusiri-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object 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

Permission Set Groups

Permission Sets

Profiles

Public Groups

SETUP Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00d2w00000py9leab.5rcwnwnocsi@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	R_Dharaniya	dr	rdharaniya2003@gmail.com	CEO	<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/> Edit	R_Dharaniya, R_Dharaniya	RR.Dh	dharaniya@developer.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d2w00000py9leab.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@00d2w00000py9leab.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User Reset Password Add Multiple Users

Activate Windows

Go to Settings to activate Windows.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

## MILESTONE 7

### ACTIVITY 1

Travel Approval | Salesforce

governmentartscollegemusiri-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XXHj/PageLayouts/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Travel Approval

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

Page Layouts

1 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Travel Approval Layout	R.Dharaniya R.Dharaniya, 29/03/2023, 4:26 pm	R.Dharaniya R.Dharaniya, 30/03/2023, 12:38 pm

Activate Windows

Go to Settings to activate Windows.

## MILESTONE 8

### ACTIVITY 1

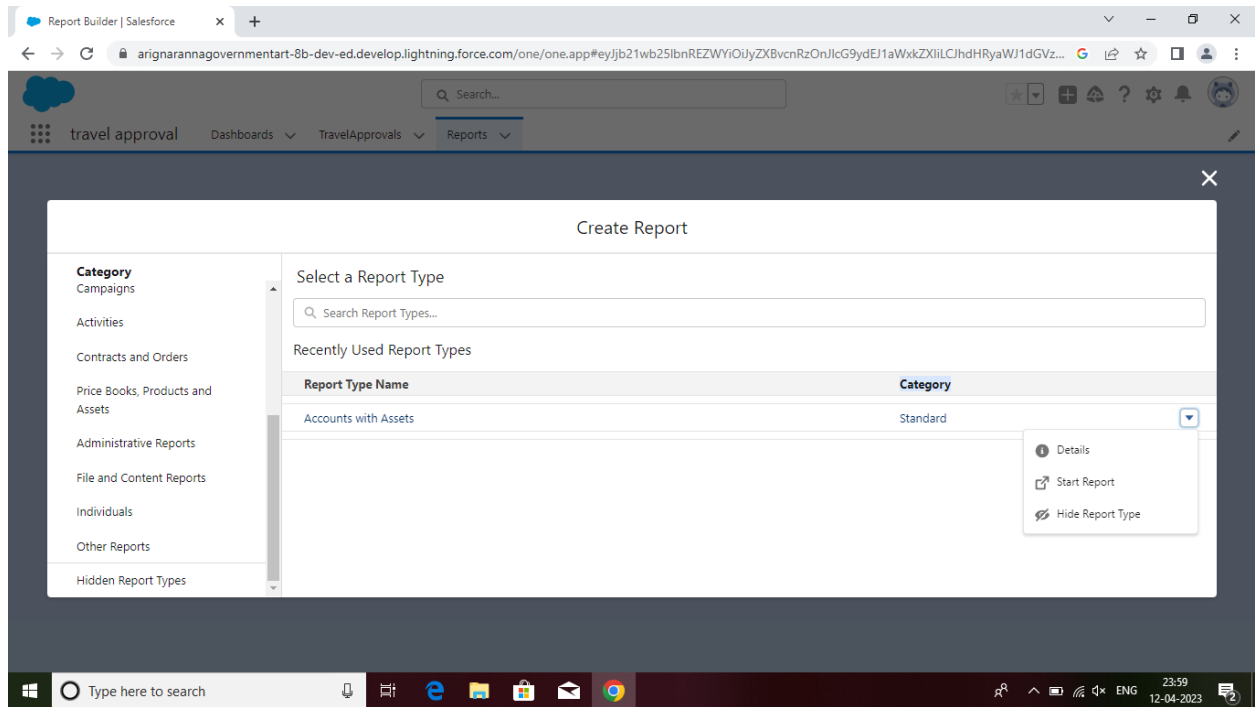
The screenshot shows the Salesforce Setup interface for a custom field named 'Total Expenses' under the 'Travel Approval' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Travel Approval Custom Field Total Expenses' and includes a 'Back to Travel Approval' link. Below this, there are tabs for 'Custom Field Definition Detail' (selected), 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab displays the following information:

Field Information		Object Name
Field Label	Total Expenses	Travel Approval
Field Name	Total_Expenses	Data Type
API Name	Total_Expenses__c	Text
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	R.Dharaniya.R.Dharaniya, 30/03/2023, 12:38 pm	Modified By
		R.Dharaniya.R.Dharaniya, 30/03/2023, 12:38 pm

Below the field information, there is a 'General Options' section with a 'Required' checkbox that is currently unchecked. At the bottom of the page, there is a Windows taskbar with the search bar, task view button, and several application icons. The system clock shows the time as 15:13 on 12-04-2023.

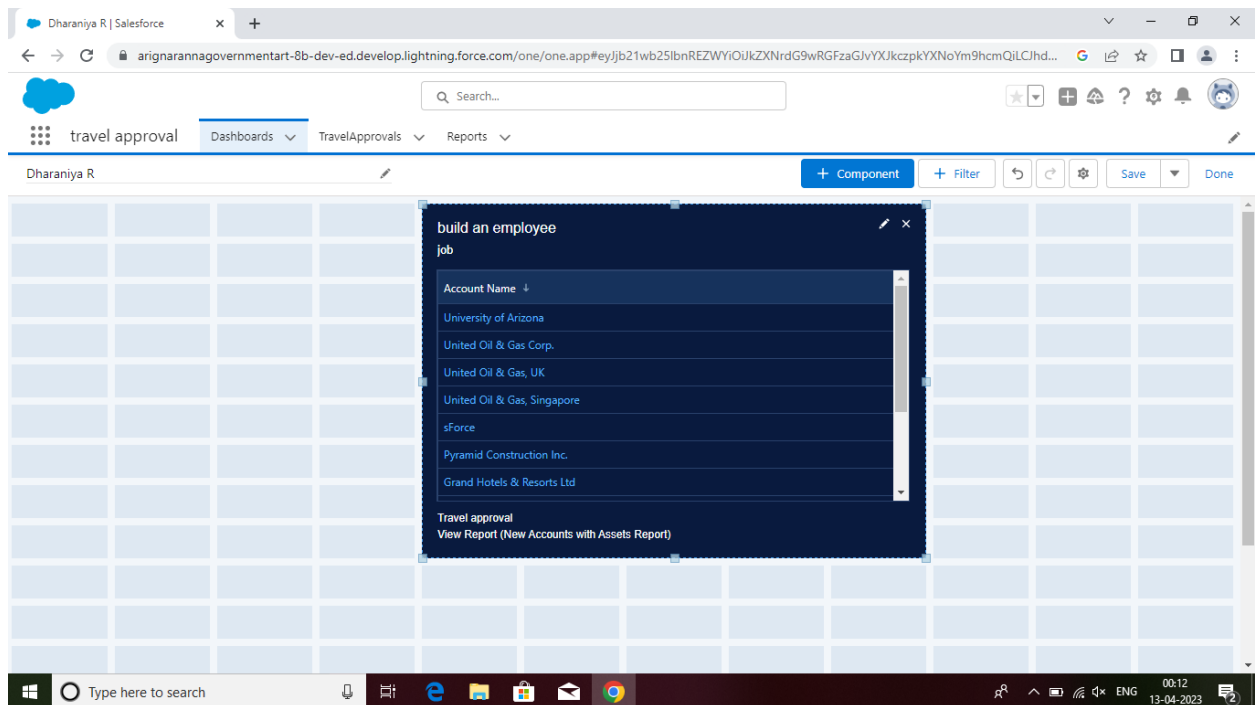
## MILESTONE 10

### ACTIVITY 1



## MILESTONE 11

### ACTIVITY 1



#### 4 Trailhead Profile Public URL

Team Head: <https://trailblazer.me/id/dharr371>

Team member :1 <https://trailblazer.me/id/divas44>

Team member :2 <https://trailblazer.me/id/durgr6>

Team member :3 <https://trailblazer.me/id/ggokul30>

### 5 ADVANTAGES & DISADVANTAGES

#### **Advantages:**

Employees have to travel to different locations as part of their job profiles in business organizations. These trips to meet specific objectives include travel and accommodation. To set ground rules for booking of flights, hotels, etc., an organization has to formulate a sound travel policy. The business travel policy covers several aspects of travel and offers guidelines to employees, corporate managers, finance staff, and travel agencies. It details the expenses employees may claim during business trips for reimbursement.

The standard travel policy of an organization clarifies travel arrangement procedures, approval processes, the scope of business travels, expense reporting, and reimbursement processes. An ideal [corporate travel management company](#)'s

travel policy aims to facilitate safe and comfortable travel for higher productivity and greater control over travel costs.

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.

## **Disadvantages:**

Inefficient & inconsistent T& E management – Companies that fail to adopt travel policy have found their business trips to be highly inefficient, unsystematic and inconsistent. This is due to travel employees booking and arranging travel with travel partners, suppliers and operators of their choice. Lack of set process within defined parameters can mask visibility of even the vital travel & expenses (T&E) data and information. This, in



turn, can drive inefficiency into the system as the travel manager is left bereft of making informed travel decision and improvements in targeted travel policy.

Failing to partner with TMCs – Organizations that have partnered with travel management companies (TMCs) have benefitted a lot out of their industry knowledge and experience. Firms that haven't, thinking that it may be expensive, would possibly end up paying more at the end of the day.

## 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.

The usage of the travel approval application is described below

## **Conclusion:**

This blog concludes with the advantages and disadvantages of business travel. The primary purpose of [business travel](#) is to develop new ideas about business operations. On the other hand, the disadvantage of business travel is that it enhances the organization's expense. So it may affect the growth of the organization.

## **FUTURE SCOPE:**

Travel request forms are designed to give management an overview of the intended business trip from both a cost and a strategic point of view. The fields that typically appear on a travel request form include;

Employee name and contact information.

The business purpose of the trip.

Destination details.

Departure and return dates.

Predicted travel costs which are broken down by category. For example, airfares, other transportation, accommodation, and meal allowances.

Notes of any visa requirements for international travel.

Any relevant comments from the employee's manager.

