

1 INTRODUCTION

1.1 Overview

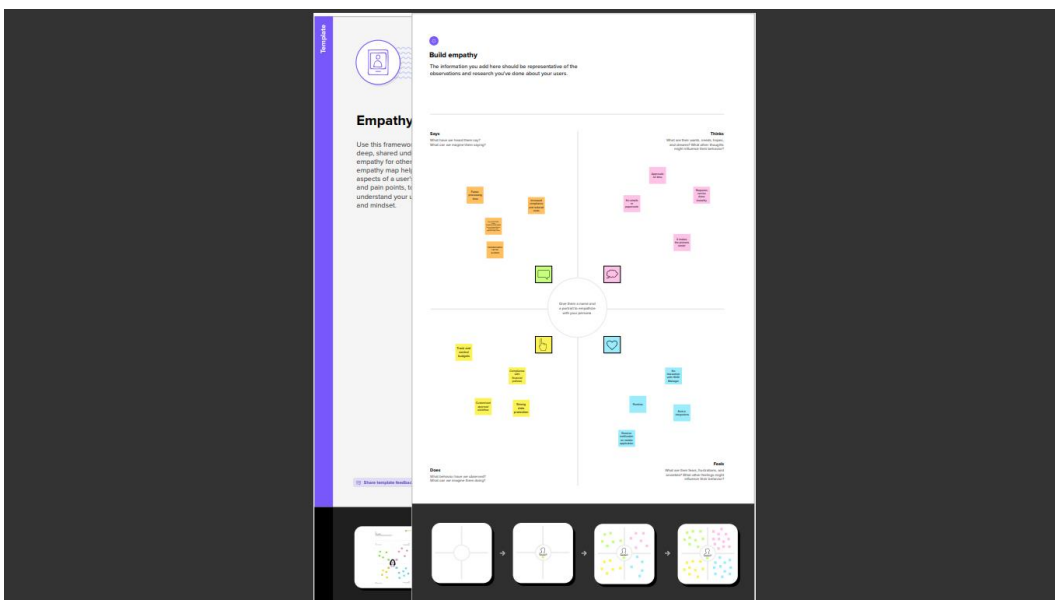
A travel request approval workflow is a function within expense management software. This allows you to do set an approval system before funds from corporate credit program are given to employees. The best part is that all of this can be done remotely from wherever they are using the platform. This project helps in sending the travel approval requests to their Manager with no time constraints and zero paperwork.

1.2 Purpose

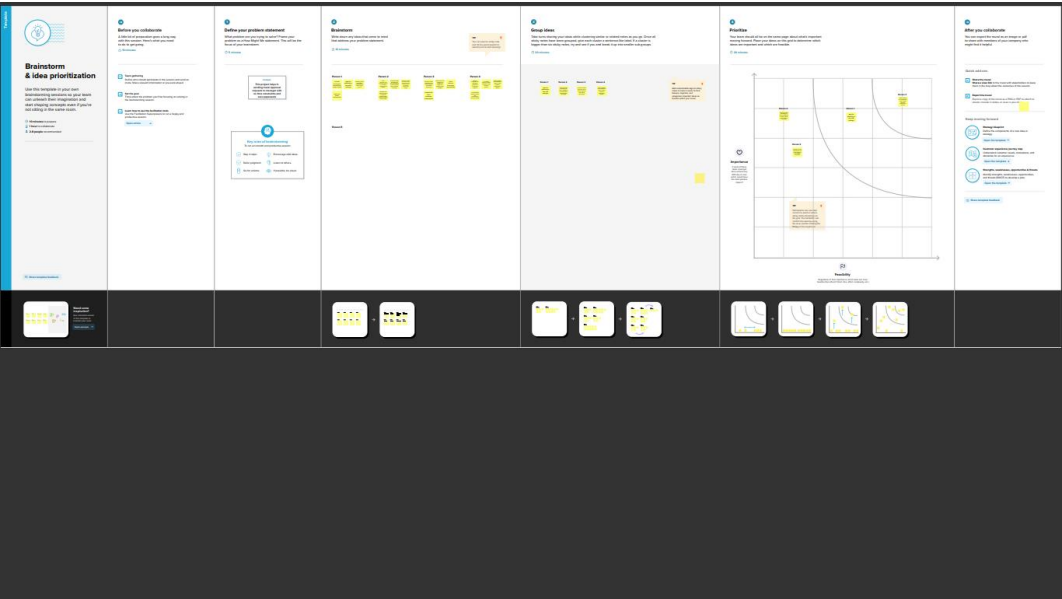
Travel request approval is imperative for every business as facilitating the employees to travel easily will enable them to carry out their work in an efficient manner.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map




3 RESULT

3.1 Data Model:








Object name	Fields in the Object	
Department	Field label	Data type
	Created by	Lookup(user)
	Department name	Text (80)
Expense Item	Field label	Data type
	Amount	Currency (16, 2)
	Expense Type	Picklist
Travel Approval	Field label	Data type
	Destination State	Text (2)
	Status	Picklist

3.2 Activity & Screenshot

DEPARTMENT



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER
DEPARTMENT

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

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Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships








4 Items, Sorted by Field Label

Quick Find


NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
DEPARTMENT Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓








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Details

EditDelete

Description

API Name
DEPARTMENT__c

Custom

✓

Singular Label
DEPARTMENT

Plural Label
DEPARTMENTS

Enable Reports
✓


Track Activities

Track Field History








Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Field Label: Created by



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Search Layouts

DEPARTMENT Field
Created By

Back to DEPARTMENT

Set Field-Level SecurityView Field Accessibility

Field Information

Field Label	Created By	Field Name	CreatedBy
Data Type	Lookup(User)		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

New

Validation Rules Help

No validation rules defined.

Field Label: Department Name

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DEPARTMENT Field

DEPARTMENT Name

Back to DEPARTMENT

Set Field-Level SecurityView Field Accessibility

Field Information

Field Label	DEPARTMENT Name	Field Name	Name
Data Type	Text(80)		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

New

Validation Rules Help

No validation rules defined.

EXPENSE ITEM

SetupHomeObject Manager

Expense Item

Details

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Restriction Rules

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Expense Item Number	Name	Auto Number		✓
Expense Type	Expense_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
TRAVEL APPROVAL	TRAVEL_APPROVAL__c	Master-Detail(TRAVEL APPROVAL)		✓

SetupHomeObject Manager

Expense Item

Details

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Restriction Rules

Details

Description

API Name

Expense_Item__c

Custom

✓

Singular Label

Expense Item

Plural Label

Expense Items

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

Field Label: Amount

SetupHomeObject Manager

EXPENSE ITEM

Expense Item

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Restriction Rules

Expense Item Custom Field

Amount

Back to Expense Item

Validation Rules

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Amount	Object Name	Expense Item
Field Name	Amount	Data Type	Currency
API Name	Amount__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	A HARISHKUMAR, 03/04/2023, 1:17 pm	Modified By	A HARISHKUMAR, 03/04/2023, 1:17 pm

General Options

Required	<input type="checkbox"/>
Default Value	

Field Label: Expense Type

SetupHomeObject Manager

EXPENSE ITEM

Expense Item

Details

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Expense Item Custom Field

Expense Type

Back to Expense Item

Validation Rules

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Expense Type	Object Name	Expense Item
Field Name	Expense_Type	Data Type	Picklist
API Name	Expense_Type__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	A HARISHKUMAR, 03/04/2023, 1:21 pm	Modified By	A HARISHKUMAR, 03/04/2023, 1:21 pm

General Options

Required	<input type="checkbox"/>
Default Value	

TRAVEL APPROVAL

SetupHomeObject Manager

TRAVEL APPROVAL

Fields & Relationships

13 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
DEPARTMENT	DEPARTMENT__c	Lookup(DEPARTMENT)		✓
Destination State	Destination_State__c	Text(2)		
Last Modified By	LastModifiedById	Lookup(User)		
Out-of-State	Out_of_State__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓
Purpose of Trip	Purpose_of_Trip__c	Text Area(255)		
Status	Status c	Picklist		

Field Label: Destination State

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TRAVEL APPROVAL Custom Field
Destination State
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[Validation Rules \(0\)](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Destination State	Object Name	TRAVEL APPROVAL
Field Name	Destination_State	Data Type	Text
API Name	Destination_State__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	A.HARISHKUMAR 01/04/2023, 5:26 pm	Modified By	A.HARISHKUMAR 01/04/2023, 5:26 pm

General Options

Required ☐

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
TRAVEL APPROVAL

Details [Edit](#) [Delete](#)

Description

API Name
TRAVEL_APPROVAL__c

Custom
✓

Singular Label
TRAVEL APPROVAL

Plural Label
TRAVEL APPROVALS

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Field Label: Status

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Status
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[Validation Rules \(0\)](#)

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Field Information

Field Label	Status	Object Name	TRAVEL APPROVAL
Field Name	Status	Data Type	Picklist
API Name	Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	A.HARISHKUMAR 06/04/2023, 7:45 am	Modified By	A.HARISHKUMAR 06/04/2023, 7:45 am

General Options

DASHBOARD

TRAVEL APPROVAL Reports Dashboards TRAVEL APPROVALS EVENTS ATTENDEES SPEAKERS VENDORS

Travel approval application

[+ Component](#) [+ Filter](#) [↶](#) [↷](#) [⚙](#) [Save](#) [Done](#)

Travel Requests by Department

Record Count

0 2 4 6 8 10 12 14

13

View Report (Travel Requests by Department)

4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/harishkumar18>
Team Member 1 - <https://trailblazer.me/id/bbharathi22>
Team Member 2 - <https://trailblazer.me/id/ggowtham32>
Team Member 3 - <https://trailblazer.me/id/vveera88>



5 ADVANTAGES & DISADVANTAGES

ADVANTAGES OF USING TRAVEL APPLICATION

- Approvals on time
- Customized approval workflows
- Faster processing time
- Increased compliance and reduced costs
- Convenient and easy to use
- Real time alerts in case of flight change

DISADVANTAGES OF USING TRAVEL APPLICATION

- Itineraries cannot be edited
- It cannot be used offline
- Provides no information about the blocked or damaged road

6 CONCLUSION

It is not easy to manage expense with a traditional expense approval process where spreadsheets and emails are used. Without proper approval and planning, there are chances for last-minute chaos.

Finally we conclude that a Travel Approval Application makes the overall process efficient and provides an easier interface to the users.

FUTURE SCOPE

As for future enhancements that can be made in the future, the following can be considered:

- ❖ Offline working flexibility
- ❖ Better customer service support
- ❖ Effective Change Management which involves customizable notification that alerts the employee to change policy and encourages the right choice.
- ❖ The meaningful reports of the automated travel management solution help in making decisions and streamlines the auditing process.
- ❖ It helps approvers to review the detailed travel itineraries in a single dashboard.