



Build A Employee Travel Approval Application For Corporates



NAAN MUDHALVAN PROJECT REPORT

Submitted by

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BONAFIDE CERTIFICATE

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At the outset, we express our heartfelt gratitude to god, who has been our strength to bring this project to light.

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LIST OF ABBREVIATION

CRM	Customer Relationship Management
ESP	Email Service Provider
UI	User Interface
UX	User Experience
OWD	Org - Wide Default
CTA	Call To Action
CSV	Comma - Separated Values
SLA	Service Level Agreement
API	Application Programming Interface
SaaS	Software as a Service
PaaS	Platform as a Service

CHAPTER-1

PROJECT SPECIFICATION

1.1 Project Goal

Building an Employee Travel Approval Application for corporate use within the Salesforce platform involves a multi-faceted approach, starting with requirements gathering to define user roles and workflows. A well-structured data model captures essential information, and user-friendly interfaces for both employees and managers streamline the travel request and approval process. Workflow automation facilitates efficient routing and notifications, while integrations with external systems like expense management tools enhance data accuracy.

Robust reporting and analytics tools offer insights, and mobile app development ensures accessibility on-the-go. Security and compliance measures safeguard sensitive data, and thorough testing ensures a reliable application. Training and documentation support user adoption, and ongoing maintenance and improvements address evolving needs. Scalability planning and future enhancements cater to growing demands, while comprehensive documentation maintains transparency, ultimately streamlining the travel approval process and enhancing efficiency.

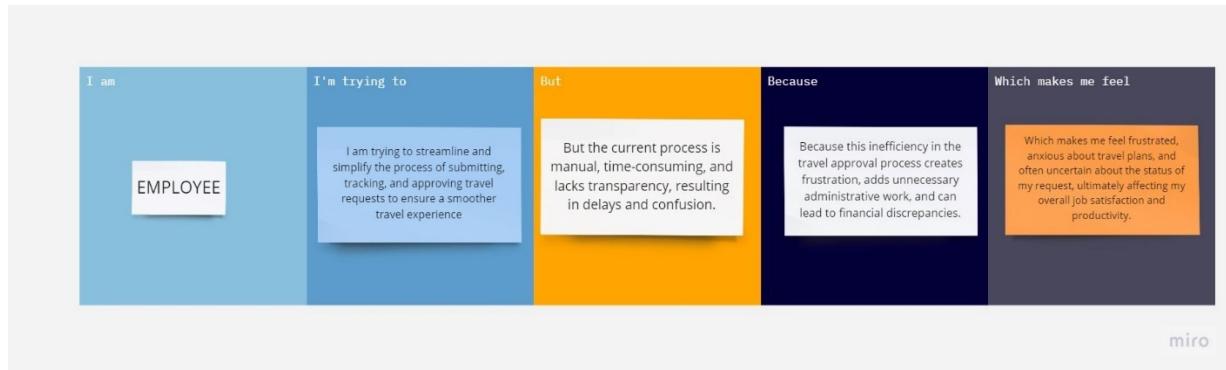
1.2 Project Scope

The Employee Travel Approval Application built in Salesforce serves a vital purpose in corporate travel management. Firstly, it streamlines and automates the often complex and time-consuming travel request and approval process. This efficiency results in reduced administrative burdens, faster approval times, and improved communication between employees and managers. With the ability to centralize all travel-related data, the application ensures data accuracy and compliance with corporate policies and regulatory requirements, contributing to better financial management and accountability.

The application fosters transparency throughout the travel approval workflow. Both employees and managers can easily track the status of travel requests, which enhances visibility into the process. By providing a clear overview of approval progress, it minimizes potential delays and miscommunication, ultimately improving the user experience and helping employees plan their travel more effectively.

The Employee Travel Approval Application in Salesforce offers robust security, ensuring that sensitive data is protected while also providing scalability for future growth. The built-in reporting and analytics tools offer insights into travel expenses and approval metrics, supporting data-driven decision-making. By facilitating on-the-go access through mobile app development, the application empowers employees and managers to manage travel efficiently and enhances the organization's overall travel management capabilities. In conclusion, the application optimizes corporate travel management by enhancing efficiency, transparency, and control, ultimately leading to cost savings and a more seamless user experience.

1.3 Problem Statement Definition

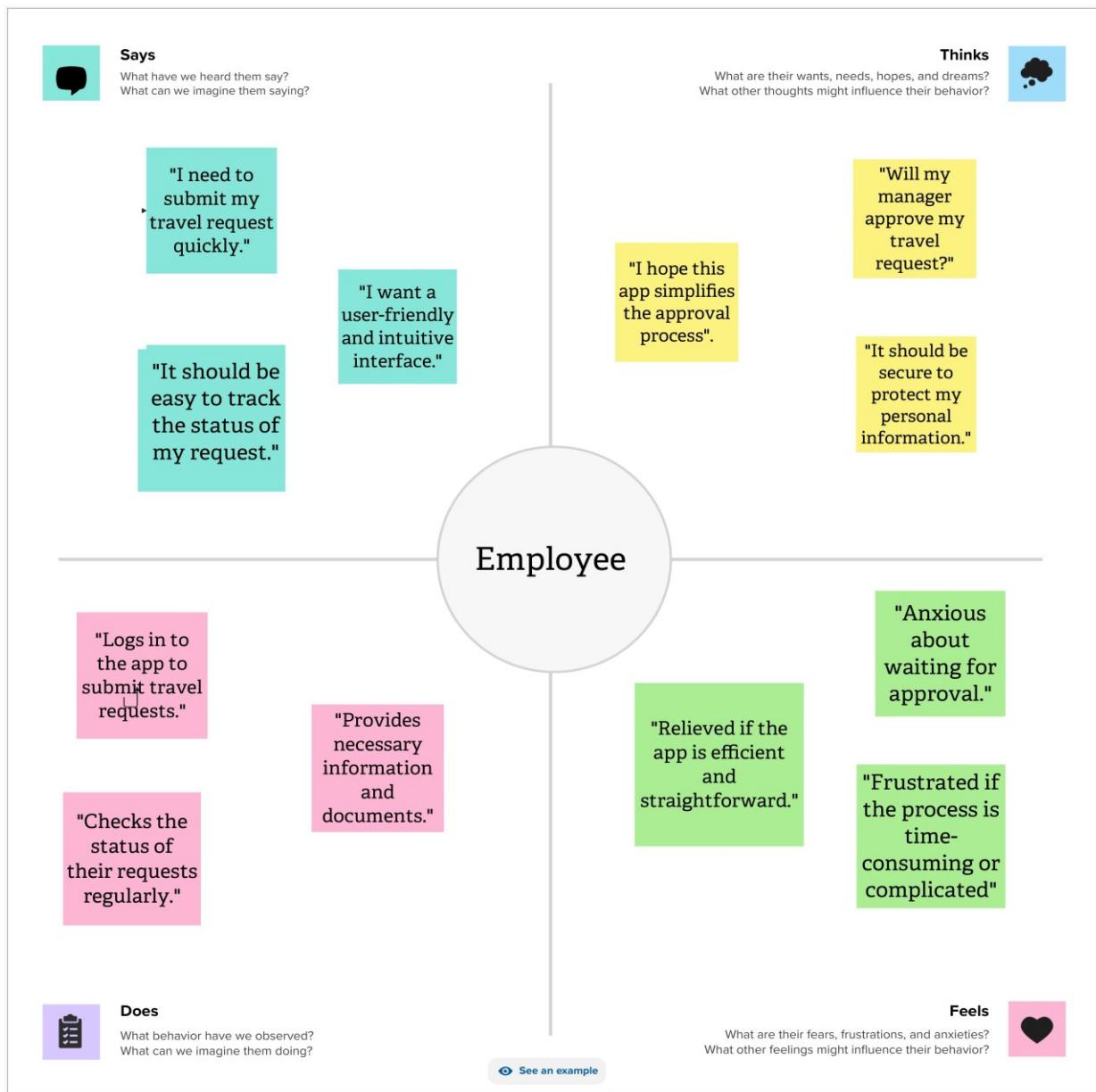


Problem Statement (PS)	I am (Employee)	I'm trying to	But	Because	Which makes me feel
PS	Employee	I am trying to streamline and simplify the process of submitting, tracking, and approving travel requests to ensure a smoother travel experience	But the current process is manual, time-consuming, and lacks transparency, resulting in delays and confusion.	Because this inefficiency in the travel approval process creates frustration, adds unnecessary administrative work, and can lead to financial discrepancies	Which makes me feel frustrated, anxious about travel plans, and often uncertain about the status of my request, ultimately affecting my overall job satisfaction and productivity

1.4 Empathy Map Canvas

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.



1.5 Ideation & Brainstorming

Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.

Step-1: Team Gathering, Collaboration and Select the Problem Statement:

The template is divided into several sections:

- Template**: A sidebar on the left containing a lightbulb icon and a wavy line.
- Brainstorm & idea prioritization**: The main title with a sub-instruction: "Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room."
- 1 Define your problem statement**: A step with a timer icon indicating 5 minutes. It asks: "What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm." Below is a project summary: "The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project is for the students who are interested in cross-technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well." There is also a note: "10 minutes to prepare, 1 hour to collaborate, 2-4 people recommended".
- 2 Before you collaborate**: A step with a timer icon indicating 10 minutes. It includes:
 - Team gathering**: "Define who should participate in the session and send an invite. Share relevant information or pre-work ahead."
 - Set the goal**: "Think about the problem you'll be focusing on solving in the brainstorming session."
 - Learn how to use the facilitation tools**: "Use the Facilitation Superpowers to run a happy and productive session." A link to "Open article" is provided.
- Key rules of brainstorming**: A section with a circular icon showing two hands. It lists five rules:
 - Stay in topic.
 - Encourage wild ideas.
 - Defer judgment.
 - Listen to others.
 - Go for volume.
 - If possible, be visual.
- Need some inspiration?**: A footer section featuring a grid of small icons representing various ideas and concepts.

Step-2: Brainstorm, Idea Listing and Grouping:

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

⌚ 10 minutes

TIP
You can select a sticky note and click the pencil [pencil] icon to start drawing!

Person 1	Person 2
User-Friendly Dashboard: Create an intuitive dashboard for employees to submit travel requests and track their status.	Manager Approval Workflow: Implement a workflow that allows managers to review and approve travel requests easily.
Person 3	Person 4
Notification System: Implement a notification system to keep employees informed about the status of their travel requests.	Real-Time Currency Conversion: Provide a currency conversion feature to help employees manage expenses in different currencies.
Travel Policy Integration: Include the company's travel policy within the app, ensuring employees are aware of guidelines and restrictions.	Expense Management: Allow employees to submit expense reports related to their trips and attach receipts
Analytics and Reporting: Generate reports for corporate administrators to analyze travel patterns and expenses.	Manager Approval Workflow: Implement a streamlined workflow that allows employees to submit travel requests, and managers to easily review and approve them within the application. This ensures a quick and efficient approval process.

3

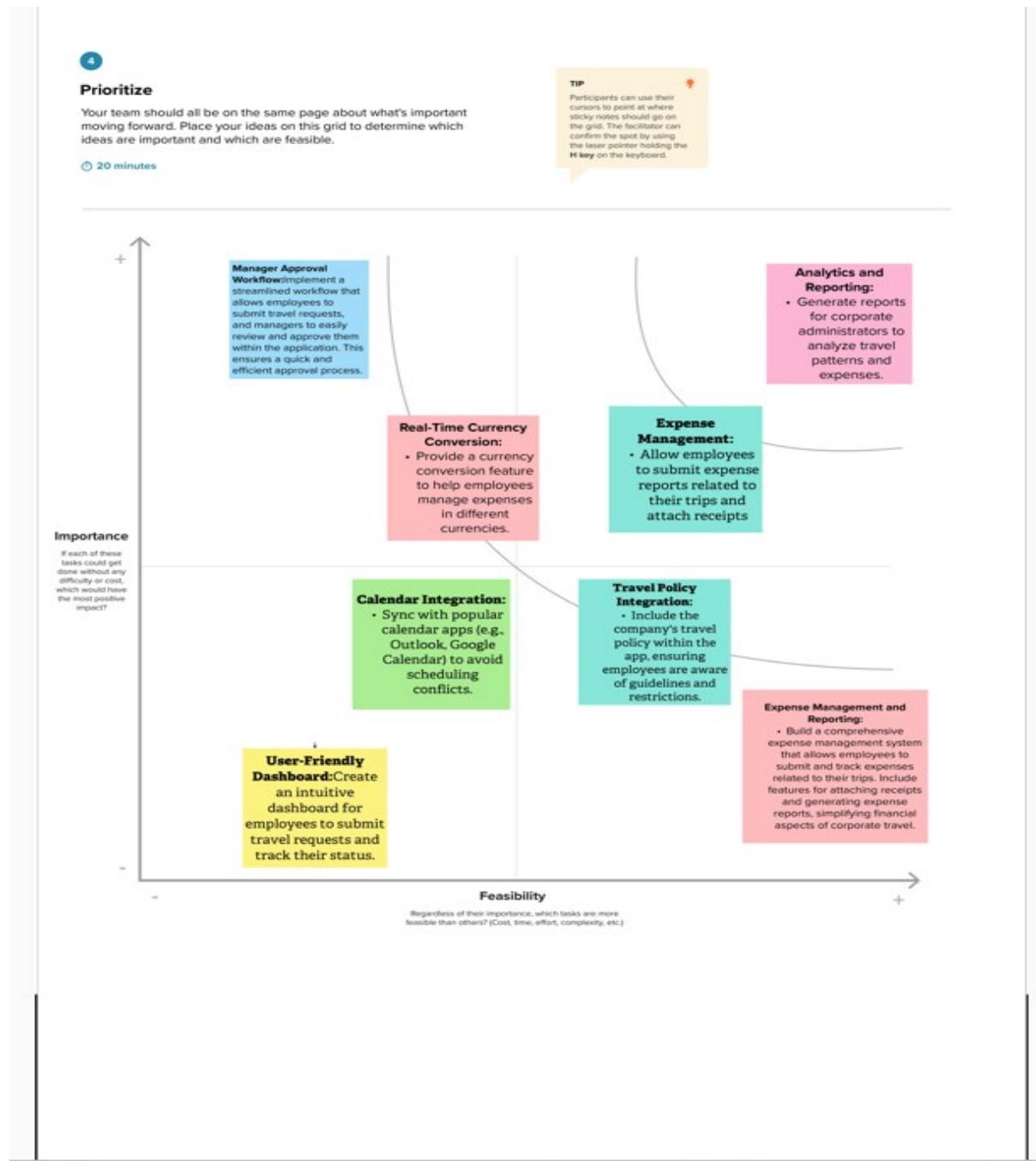
Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

⌚ 20 minutes

TIP
Add customizable tags to sticky notes to make it easier to find, organize, and categorize important ideas as themes within your mural.

Step-3: Idea Prioritization:



1.6 Proposed Solution

S. No	Parameter	Description
1.	Problem Statement (Problem to be solved)	<p>Corporates often grapple with inefficient and manual travel approval processes that involve paperwork and a lack of transparency. These outdated methods lead to delays, increased administrative work, and potential compliance issues. The process is a source of stress for employees who require timely approvals to plan their business trips effectively, and it leaves them dissatisfied with the process. Managers, on the other hand, struggle to review and manage a high volume of travel requests while ensuring compliance. The absence of transparency leads to bottlenecks and a lack of visibility, leaving them overwhelmed and frustrated.</p>
2.	Idea / Solution description	<p>Our proposed solution is to develop an Employee Travel Approval Application within Salesforce, offering automation and centralization. The application will provide a user-friendly and automated system that allows employees to submit travel requests seamlessly. Managers will be able to review and approve them efficiently, while the system offers real-time tracking of request statuses. It will also include integration with external systems for expense management, robust security measures, mobile accessibility and analytics tools for data-driven decision-making. The benefits include reduced administrative burdens, improved communication, cost control, and better compliance with corporate policies and regulations.</p>

3.	Novelty / Uniqueness	<p>What sets our solution apart is the innovative use of Salesforce, a highly customizable and powerful platform, to streamline corporate travel management. The automation of approval workflows and integration with external systems will significantly reduce manual work and errors. The mobile app component will provide users with the flexibility and convenience of on-the-go access. Furthermore, the incorporation of robust reporting and analytics tools will enable data-driven decision-making and offer insights into travel expenses, setting our solution apart from conventional methods.</p>
4.	Social Impact / Customer Satisfaction	<p>Our application will have a substantial social impact by enhancing the user experience in corporate travel management. Employees and managers will benefit from a smoother, more transparent, and efficient travel approval process, reducing frustration and uncertainty. The streamlined process will free up time and resources for more strategic tasks, thereby improving overall workforce productivity. Data-driven decision-making will lead to better cost management, making it easier to control expenses and ensuring financial compliance. The application will also guarantee compliance with corporate policies and regulatory requirements, reducing risks and ensuring data security. Lastly, by optimizing travel planning, our solution can contribute to a more sustainable approach to business travel, aligning with corporate sustainability goals.</p>

1.7 Functional & Technical Requirements

1.7.1 Functional Requirements

FR No.	Functional Requirement (Epic)	Sub Requirement (Story / Sub-Task)
FR-1	User Management	<p>User Registration: Allow employees to register and log into the system.</p> <p>User Roles: Define roles (employees, managers, travel administrators) with different permissions.</p> <p>User Profiles: Capture and manage user profiles, including contact details.</p>
FR-2	Travel Request Submission	<p>Travel Request Form: Provide an intuitive form for employees to submit travel requests.</p> <p>Expense Entry: Allow users to enter estimated expenses, including flights, accommodation, meals, and incidentals.</p> <p>Travel Dates: Specify departure and return dates, including the option for flexible schedules.</p> <p>Attachments: Enable the attachment of supporting documents, such as itineraries or conference detail</p>
FR-3	Approval workflow	<p>Workflow Automation: Implement an automated approval process with defined workflows.</p> <p>Manager Assignment: Automatically route requests to the appropriate manager based on criteria like department or project.</p> <p>Notifications: Send notifications to managers and employees at various stages of the approval process.</p> <p>Delegation: Allow managers to delegate their approval authority when they are unavailable.</p>
FR-4	Approval Management	<p>Manager Dashboard: Provide managers with a dashboard to view and manage pending travel requests.</p> <p>Request Review: Allow managers to review travel details, expense estimates, and supporting documents.</p> <p>Approval/Rejection: Enable managers to approve or reject requests with comments.</p> <p>Escalation: Implement escalation processes for unattended requests or those exceeding certain thresholds</p>

FR-5	Expense Tracking	<p>Expense Tracking: Record actual expenses incurred during the trip.</p> <p>Receipt Upload: Allow users to upload expense receipts for verification.</p> <p>Expense Categories: Categorize expenses (e.g., transportation, lodging, meals) for reporting.</p> <p>Expense Reconciliation: Compare estimated and actual expenses for cost control.</p>
FR-6	Reporting and Analytics	<p>Reporting Tools: Develop custom reports and dashboards to monitor travel request status and expenses.</p> <p>Analytics: Implement data analytics for insights into travel patterns, expenses, and approval efficiency.</p> <p>Export: Allow users to export reports for offline use or sharing</p>

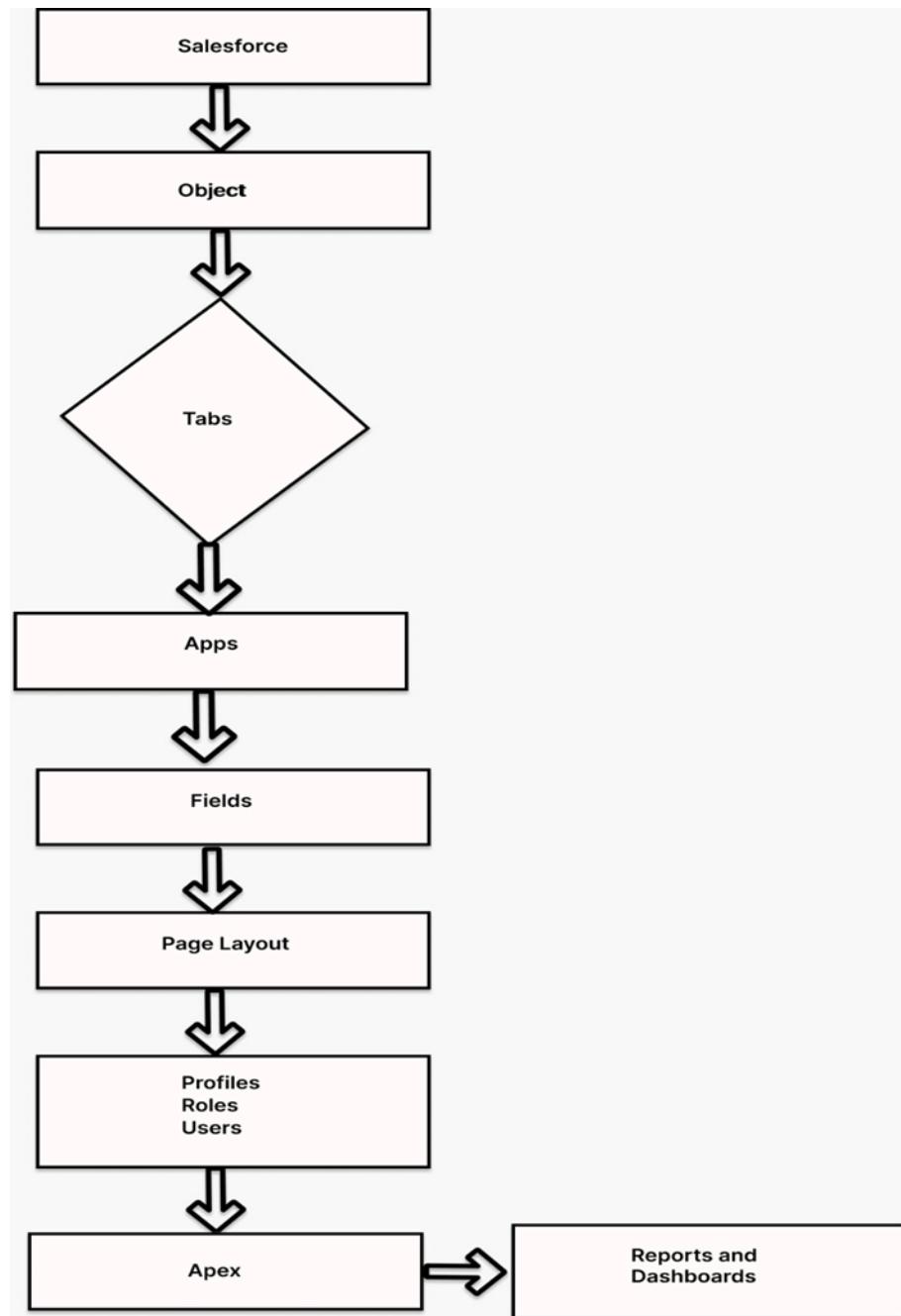
1.7.2 Technical Requirements

TR No.	Technical Requirement	Description
TR-1	Salesforce Environment	Utilize Salesforce's Enterprise or Unlimited edition to ensure scalability and access to advanced features.
TR-2	Development language	Develop using Salesforce's proprietary programming language, Apex, for server-side logic.
TR-3	Security	<ul style="list-style-type: none"> • Implement role-based access control (RBAC) to control who can access and modify data. • Encrypt sensitive data both in transit and at rest. • Utilize Salesforce Shield for enhanced security, including event monitoring and field-level encryption.
TR-4	Integration	<ul style="list-style-type: none"> • Use REST and SOAP APIs for integration with external systems, such as finance and expense management tools. • Implement Single Sign-On (SSO) solutions for seamless and secure access.
TR-5	Customization	Allow administrators to customize and configure the application, including approval workflows, fields, and user profiles.
TR-6	Mobile Accessibility	<ul style="list-style-type: none"> • Ensure that the application is accessible via the Salesforce mobile app for on-the-go request submission and tracking. • Develop a custom mobile app using Salesforce Mobile SDK for more tailored mobile functionality.

1.8 Project Road Map

1.8.1 Data Flow Diagram

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data enters and leaves the system, what changes the information, and where data is stored.



1.8.2 Technical Architecture

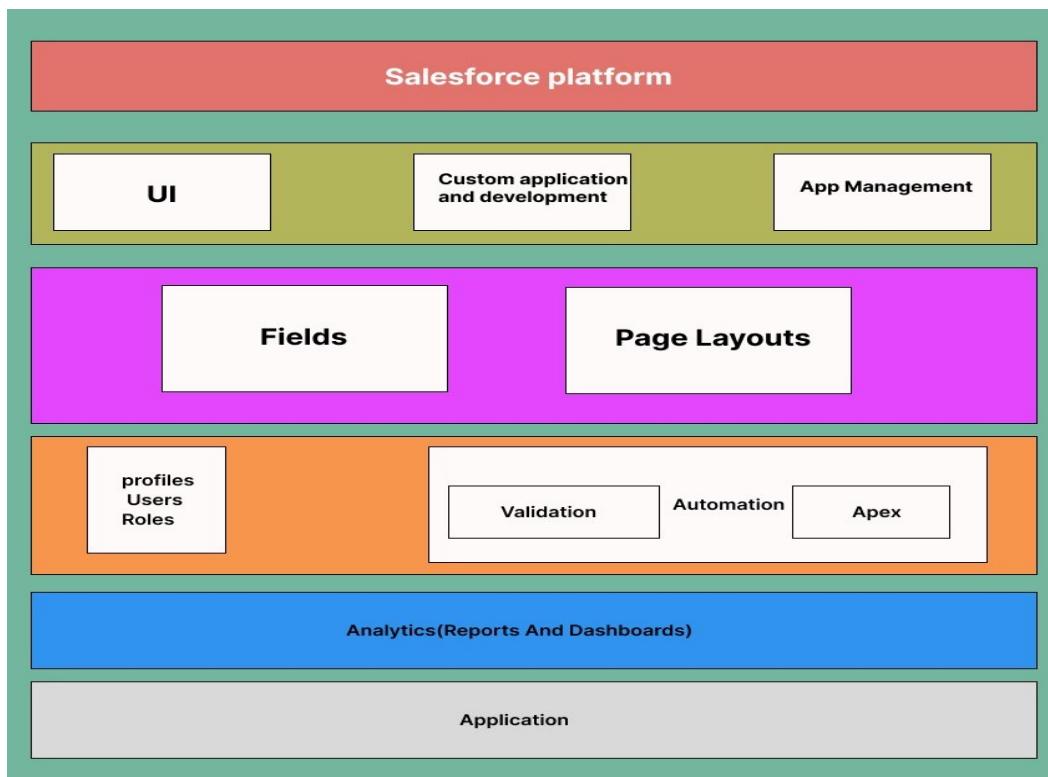


TABLE-1: Component and Technologies:

S.No	Component	Description	Technology
1.	User Interface	Lightning Components: Use Salesforce Lightning components to design the user interface for employees, managers, and administrators. Custom Pages: Create custom Visualforce pages for more tailored and complex UI elements	Salesforce
2.	Data Model	Custom Objects: Define custom objects in Salesforce to represent entities like travel requests, expenses, and approvals. Master-Detail and Lookup Relationships: Establish relationships between objects to maintain data integrity. Custom Fields: Create custom fields to capture specific information, such as travel dates, expenses, and approval status.	Salesforce

3.	Workflow Automation	Approval Processes: Implement Salesforce Approval Processes to automate and streamline the travel request approval workflow. Process Builder and Flows: Use Process Builder and Flows to automate routine tasks and send notifications.	Salesforce
4.	Reporting and Analytics	Custom Reports: Create custom reports to track travel request status, expenses, and other relevant metrics.	Salesforce
5.	Security	Role-Based Access Control (RBAC): Configure RBAC to control who can access and modify data. Data Encryption: Encrypt sensitive data both in transit and at rest. Audit Trails: Maintain audit trails to log user activities for security and compliance purposes.	Salesforce
6.	Salesforce Development	Apex: Use Salesforce's proprietary programming language, Apex, for server-side logic and data manipulation. Visualforce: Develop custom user interfaces with Visualforce pages and components. Lightning Web Components: Create modern, component-based UIs using Lightning Web Components for a more responsive and dynamic user experience	Salesforce

Table-2: Application Characteristics:

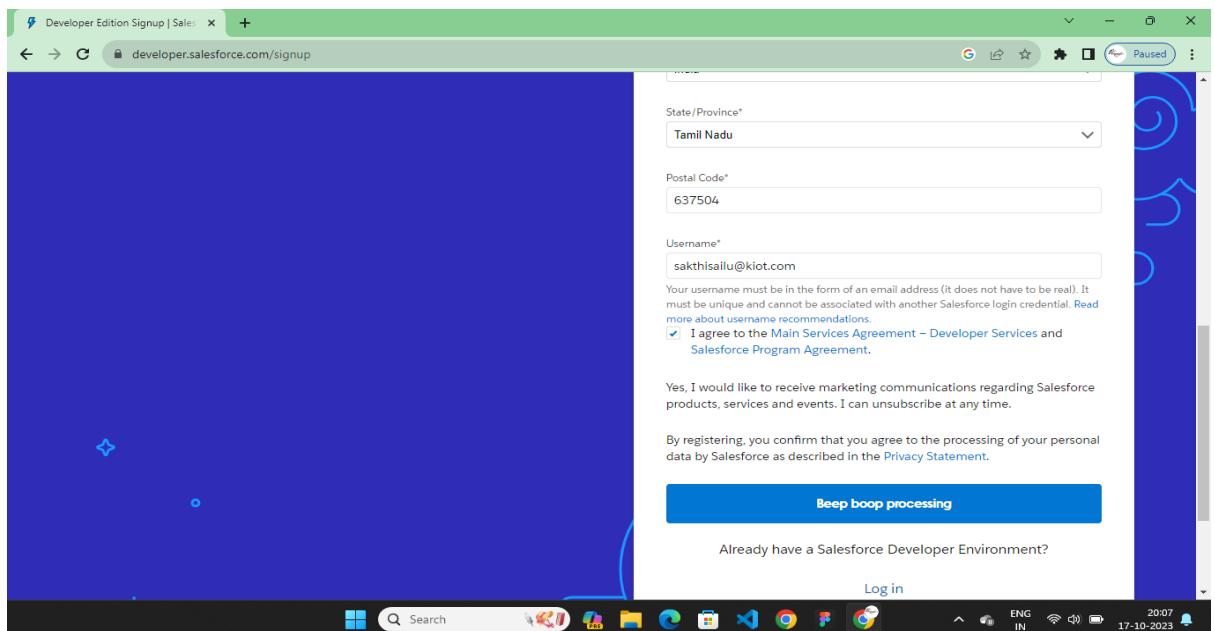
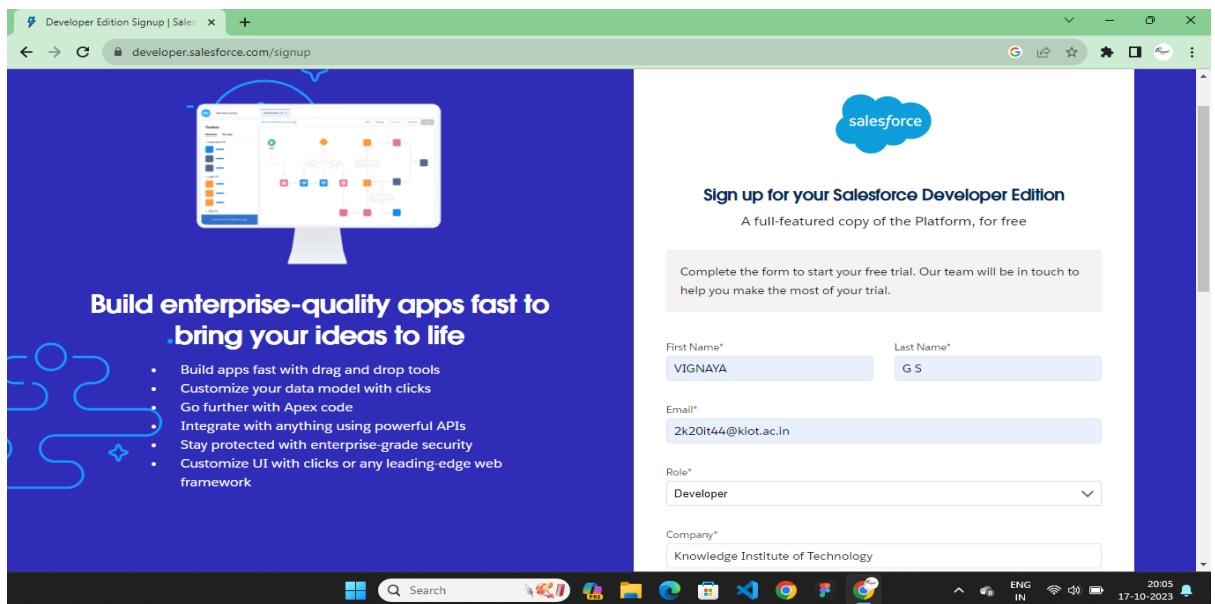
S. No	Characteristics	Description	Technology
1.	Responsive Design	Implement responsive design to adapt to various screen sizes, ensuring a consistent and visually pleasing user experience.	salesforce
2.	Accessibility	Ensure that the application is accessible via multiple devices and browsers, catering to users on desktops, tablets, and mobile devices. This accessibility is crucial for users who need to make or approve travel requests while on the go.	salesforce
3.	User-friendly	The application should have an intuitive and user-friendly interface to make it easy for employees, managers, and administrators to navigate and use the system without extensive training.	Salesforce
4.	Scalability	The application should be able to scale with the growing number of users and data, accommodating increasing demands without significant performance degradation.	salesforce
5.	Performance	Ensure the application's performance meets or exceeds user expectations, with rapid response times for actions such as submitting requests or generating reports.	salesforce
6.	Reporting and Analytics	Enable users to generate custom reports and access analytics tools to gain insights into travel patterns, expenses, and approval efficiency.	salesforce

CHAPTER-2

PREPARATION DATA MODELING

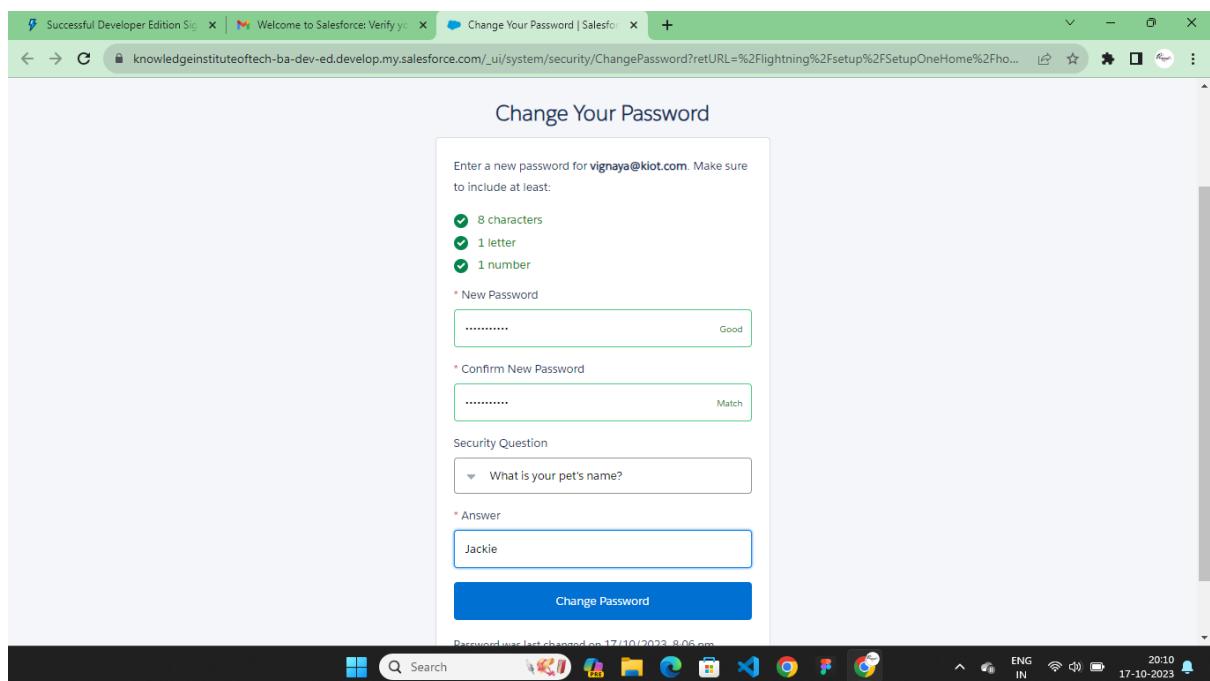
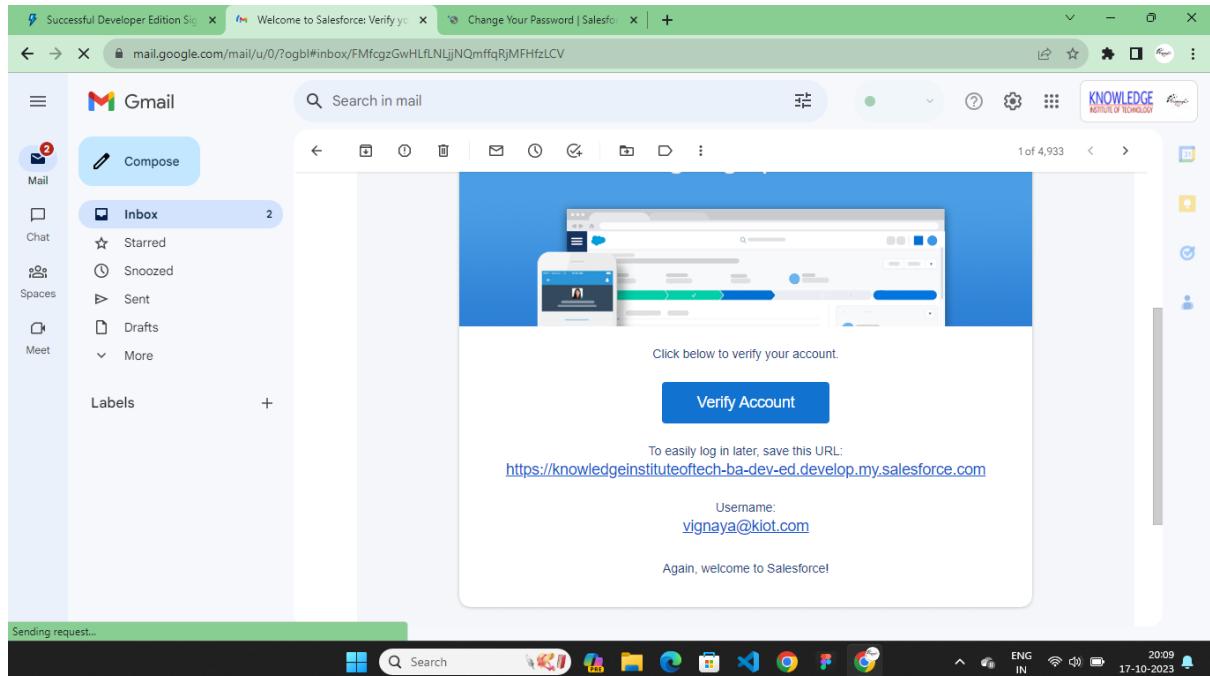
2.1 Salesforce Developer Org

In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.



Account Activation

Activation tracks information about devices from which users have verified their identity.



2.2 Custom Object Creation & Tabs

Custom Object Creation

Objects are containers for your information, but they also give you special functionality.

Custom objects are created to store information that's specific to your company or industry.

Custom Objects in Travel Approval App:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Recently Viewed | Travel Approval', 'Object Manager | Salesforce', and a new tab. The main area displays the 'Object Manager' page for the 'Travel Approval' object. On the left, a sidebar lists various standard objects like Account, Activity, and Asset. The main content area shows a table of fields for the 'Travel Approval' object, with columns for 'LABEL', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. Key fields listed include 'Expense Items' (Standard Object), 'Employee Detail' (Standard Object), and 'Payment Method' (Standard Object). The table has 14 rows. At the bottom right of the page, there are buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

Fields in Travel Approval Object

The screenshot shows the 'Fields & Relationships' section of the Salesforce Object Manager for the 'Travel Approval' object. The left sidebar lists various setup items such as 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, and Restriction Rules. The main content area displays a table titled 'Fields & Relationships' with 14 items. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. Fields listed include 'Created By' (CreatedBy), 'Department' (Department_c), 'Destination State' (Destination_State__c), 'Employee Name' (Employee_Name__c), 'Last Modified By' (LastModifiedBy), 'Out Of State' (Out_Of_State__c), 'Owner' (OwnerId), 'Purpose of Trip' (Purpose_of_Trip__c), and 'Status' (Status__c). The 'INDEXED' column contains checkmarks for most fields.

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The screenshot shows the Salesforce Object Manager interface for the 'Travel Approval' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area displays a table titled 'Fields & Relationships' with 14 items. The columns show Field Label, Field Name, and Data Type. Key fields include 'Out Of State' (checkbox), 'Owner' (Lookup(User,Group)), 'Purpose of Trip' (Text Area(255)), 'Status' (Picklist), 'Status Indicator' (Formula (Text)), 'Total Expenses' (Roll-Up Summary (SUM Expense Items)), 'Travel Approval' (Auto Number), 'Trip End Date' (Date), and 'Trip Start Date' (Date). Navigation bars at the bottom include 'Search', 'Setup', 'Home', and 'Object Manager'.

Fields in Department Object

The screenshot shows the Salesforce Object Manager interface for the 'Department' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main area displays a table titled 'Fields & Relationships' with 8 items. The columns show Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Key fields include 'Created By' (Lookup(User)), 'Department Code' (Text(6)), 'Department Name' (Text(80)), 'District' (Text(40)), 'Last Modified By' (Lookup(User)), 'Owner' (Lookup(User,Group)), 'Schoolwebsite' (URL(255)), and 'State' (Text(40)). Navigation bars at the bottom include 'Search', 'Setup', 'Home', and 'Object Manager'.

Fields in Employee Detail Object

The screenshot shows the Salesforce Object Manager interface for the 'Employee Detail' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a table titled 'Fields & Relationships' with 8 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date of Birth	Date_of_Birth__c	Date		
Department	Department__c	Lookup(Department)	✓	▼
Employee Id	Employee_Id__c	Text(12)		▼
Employee Name	Name	Text(80)	✓	▼
Gender	Gender__c	Picklist		▼
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)	✓	

Fields in Expense Object

The screenshot shows the Salesforce Object Manager interface for the 'Expense' object. The left sidebar lists various setup options. The main area displays a table titled 'Fields & Relationships' with 6 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee	Employee__c	Lookup(Employee Detail)	✓	▼
Employee Detail	Employee_Detail__c	Lookup(Employee Detail)	✓	▼
Expense	Name	Auto Number	✓	▼
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)	✓	

Fields in Expense Items Object

The screenshot shows the Salesforce Object Manager interface for the 'Expense Items' object. The left sidebar has tabs for 'Details', 'Fields & Relationships' (which is selected), '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', and 'Restriction Rules'. The main area is titled 'Fields & Relationships' and lists six fields: Amount, Created By, Expense Items Name, Expense Type, Last Modified By, and Travel Approval. Each field has a 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED' status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Expense Items Name	Name	Text(60)		
Expense Type	Expense_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Travel Approval	Travel_Approval__c	Master-Detail[Travel Approval]		

Tabs

Salesforce Tabs are like the menu options in a software application. They allow you to access specific functions, objects, or data.

The screenshot shows the Salesforce Setup page under the 'User Interface' section, specifically the 'Tabs' tab. The left sidebar has a search bar and tabs for 'User Interface', 'Rename Tabs and Labels', and 'Tabs' (which is selected). The main area is titled 'Custom Tabs' and contains a sub-section 'Custom Object Tabs' with a table showing five tabs: Departments, Employee Details, Expense Items, Expenses, and Travel Approvals. It also includes sections for 'Web Tabs' and 'Visualforce Tabs'.

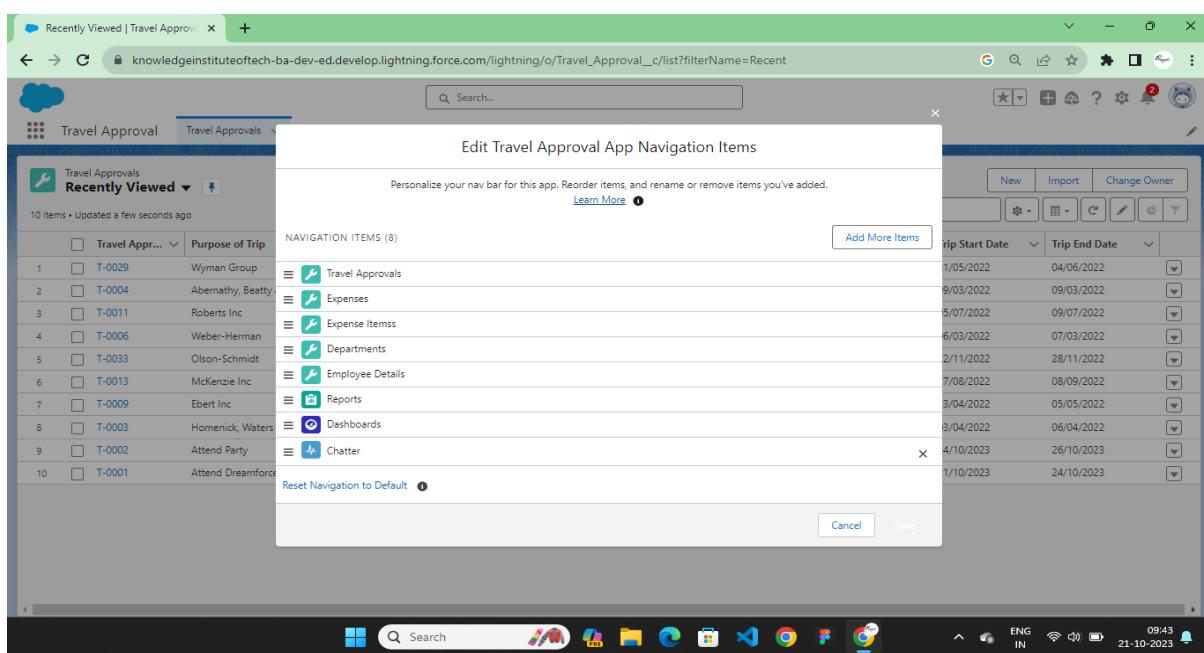
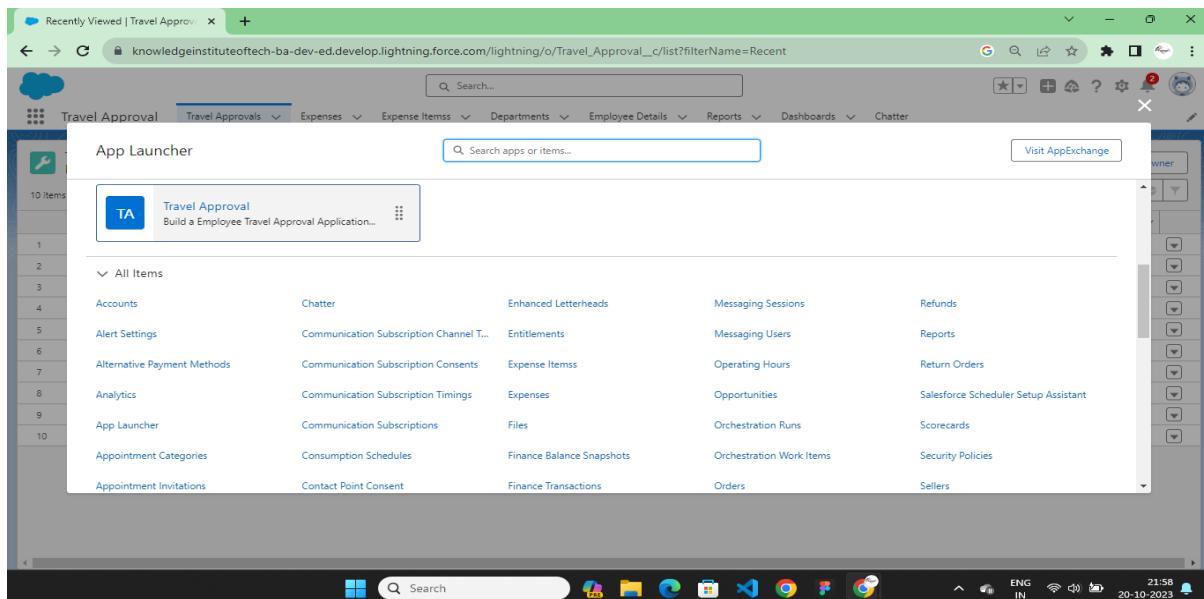
Action	Label	Tab Style	Description
Edit Del	Departments		
Edit Del	Employee Details		
Edit Del	Expense Items		
Edit Del	Expenses		
Edit Del	Travel Approvals		

2.3 Lightning App

The Lightning App Builder is a point-and-click tool that makes it easy to create custom pages for the Salesforce mobile app and Lightning Experience, giving your users what they need all in one place.

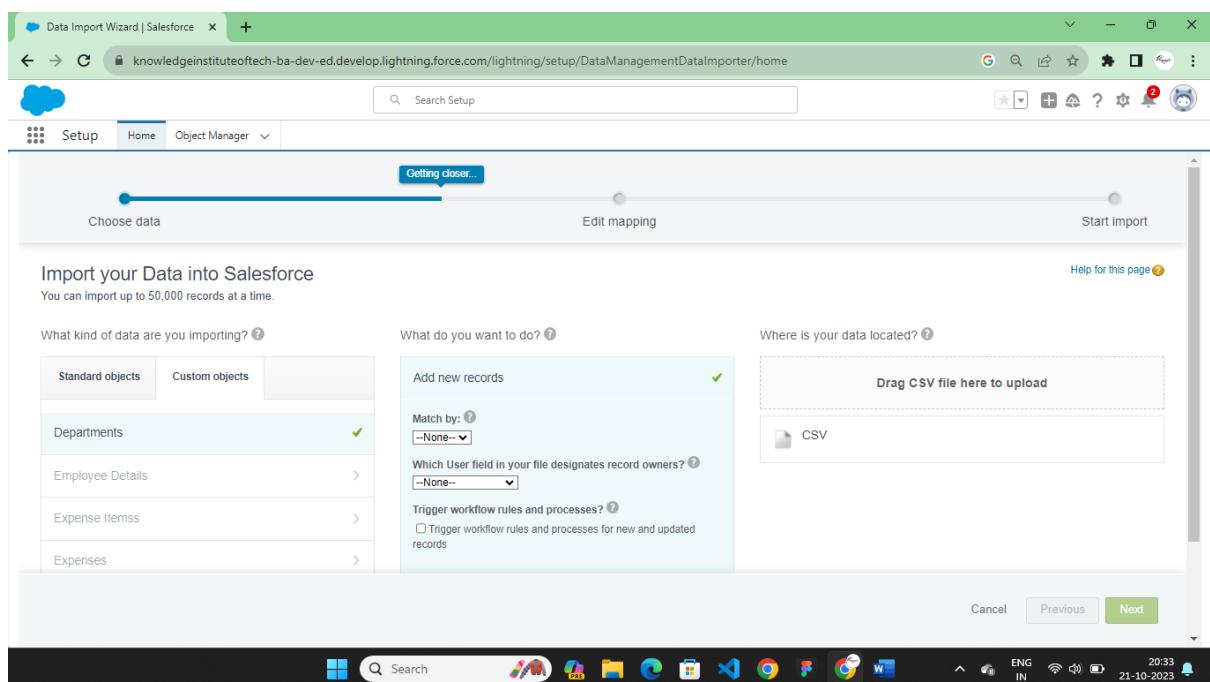
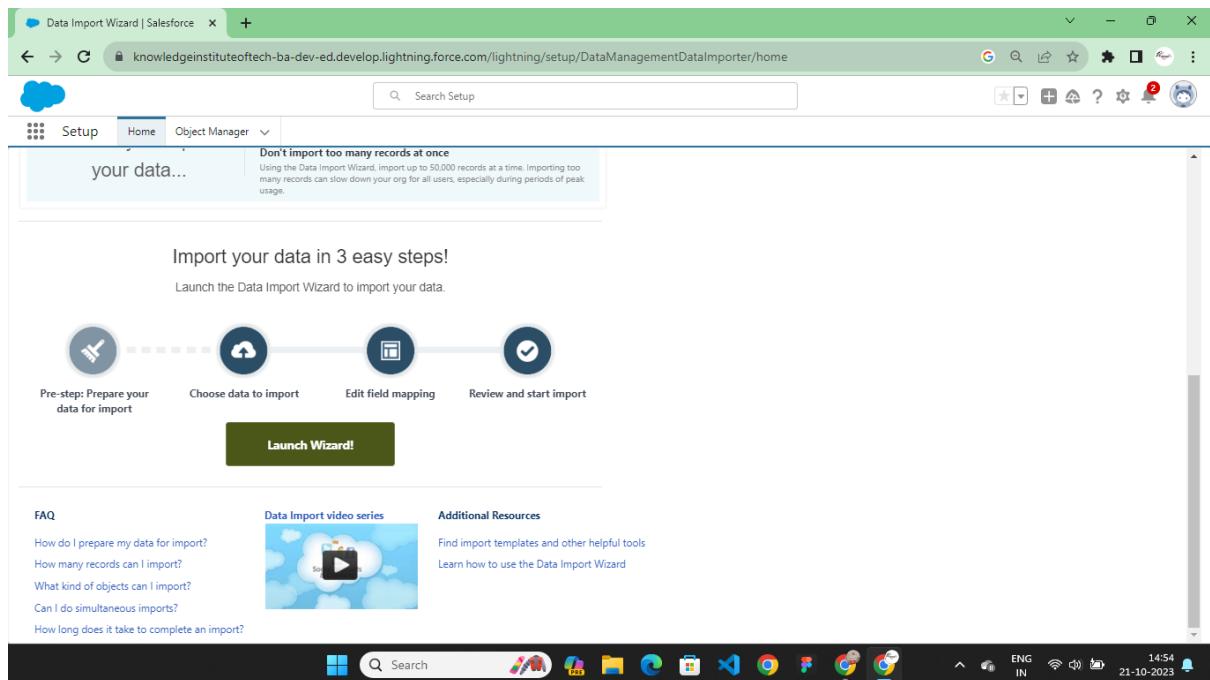
Create a Travel Approval Lightning App

- Build a Lightning app, add tabs, and customize page layouts.
- Create custom objects and fields for the app.
- Define relationships between objects.
- Import data and test the app.



Data Import

The Data Import Wizard is one of various tools available to Salesforce users for importing data. The tool is best used when importing data into the Account, Contact, Lead, or Solution objects along with any custom objects within your Salesforce organization.



2.4 Relationship between Objects

Master-Detail Relationship

A master-detail relationship defines the relationship between the parent and the child. The master table defines the parent relation and the detail defines the child relation.

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Travel Approval' is being created under the 'Expense Items' object. The 'Fields & Relationships' tab is selected. In the 'Custom Field Definition Detail' section, the 'Field Label' is 'Travel Approval', 'Field Name' is 'Travel_Approval', and 'API Name' is 'Travel_Approval__c'. The 'Object Name' is 'Expense Items' and the 'Data Type' is 'Master-Detail'. Under 'Master-Detail Options', the 'Related To' field is set to 'Travel Approval' and the 'Child Relationship Name' is 'Expense_Items'. The 'Sharing Setting' is set to 'Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.'

Look up Relationship

Lookup Relationship in Salesforce relates two objects together but does not affect deletion (cascade delete functionality) or security.

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Employee Detail' is being created under the 'Expense' object. The 'Fields & Relationships' tab is selected. In the 'Custom Field Definition Detail' section, the 'Field Label' is 'Employee Detail', 'Field Name' is 'Employee_Detail', and 'API Name' is 'Employee_Detail__c'. The 'Object Name' is 'Expense' and the 'Data Type' is 'Lookup'. Under 'Lookup Options', the 'Related To' field is set to 'Employee_Detail' and the 'Child Relationship Name' is 'Expenses'. The 'Required' checkbox is checked. The 'What to do if the lookup record is deleted?' dropdown is set to 'Clear the value of this field.'

Build A Employee Travel Approval Application For Corporates

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Department' has been created under the 'Travel Approval' object. The 'Field & Relationships' tab is selected. The 'Custom Field Definition Detail' section shows the field's properties: Field Label is 'Department', Field Name is 'Department', API Name is 'Department__c', Data Type is 'Lookup', and Object Name is 'Travel_Approval'. The 'Related To' field is set to 'Department' and 'Child Relationship Name' is 'Travel_Approvals'. The 'Required' checkbox is unchecked. The 'Lookup Options' section indicates that the field is related to 'Travel Approvals'.

Roll-up Summary

Roll-Up Summary Fields in Salesforce summarize data of particular fields from a set of related detail records and automatically display the output on the master record.

The screenshot shows the Salesforce Object Manager interface. A roll-up summary field named 'Total Expenses' has been created under the 'Travel Approval' object. The 'Field & Relationships' tab is selected. The 'Custom Field Definition Detail' section shows the field's properties: Field Label is 'Total Expenses', Field Name is 'Total_Expenses', API Name is 'Total_Expenses__c', Data Type is 'Roll-Up Summary', Summarized Object is 'Expense Items', and Object Name is 'Travel_Approval'. The 'Summary Type' is 'SUM'. The 'Roll-Up Summary Options' section indicates that the field is summarized by 'Expense Items' and aggregated by 'Expense Items: Amount'.

2.5 Customize User Interface

Customize your app's page layouts, compact layouts, and actions.

Page Layout

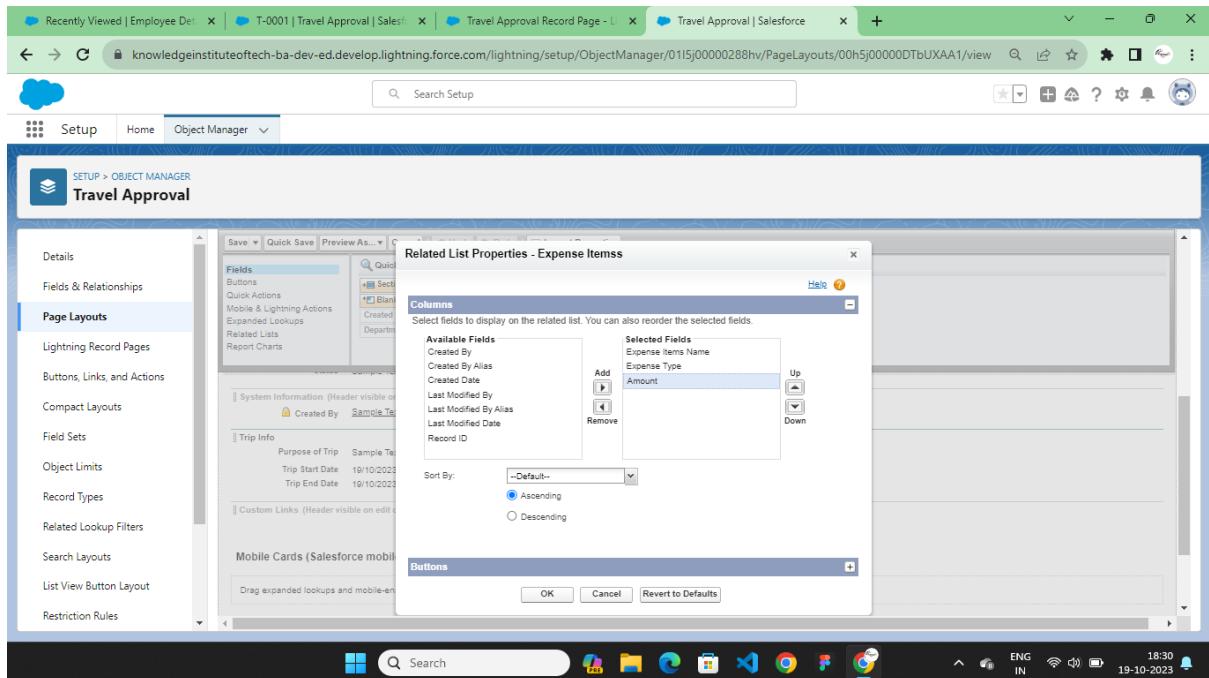
A page layout determines the fields, sections, related lists, and buttons that appear when users view or edit a record. You can modify an object's default page layout or create a custom page layout.

Build A Employee Travel Approval Application For Corporates

The screenshot shows the Lightning App Builder interface. At the top, there are three tabs: 'Recently Viewed | Employee Det...', 'T-0001 | Travel Approval | Sales...', and 'Travel Approval Record Page - L...'. The current tab is 'Travel Approval Record Page'. The main area displays a 'Travel Approval' record page with fields like 'Purpose of Trip', 'Address/Dreamforce', 'Date', 'Outfit', 'Trip Start Date', 'Trip End Date', 'City of Visit', 'Destination State', 'CA', 'Department', and 'Technology'. On the left, a sidebar lists 'Components' and 'Fields' under 'Standard (34)'. Components include Accordion, Action Launcher, Actions & Recommendations, Assessment List, CRM Analytics Collection, CRM Analytics Dashboard, Dynamic Related List - Single, Einstein Next Best Action, Flow, Flow Orchestration Work Guide, Highlights Panel, and Launchpad. The bottom status bar shows the URL 'knowledgeinstituteoftech-ba-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=flexpage__default_rec_L&recordId=a045j00000LNCdBAAX&clon...', the date '19-10-2023', and the time '18:19'.

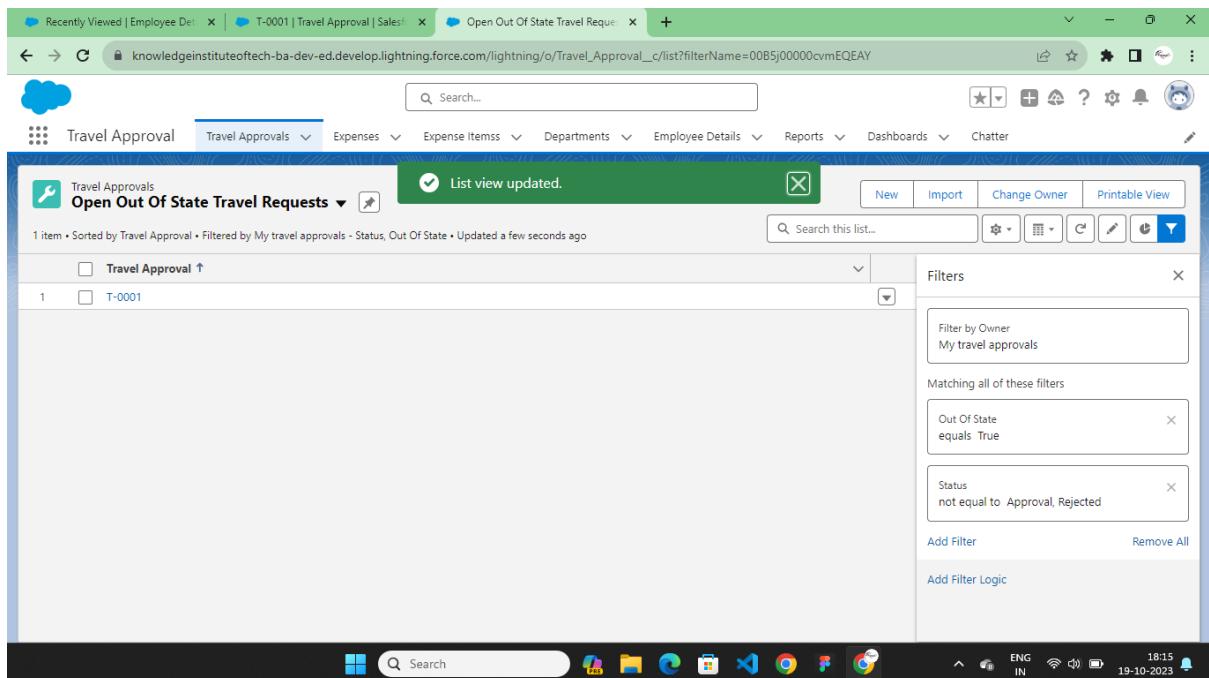
The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Recently Viewed | Employee Det...', 'T-0001 | Travel Approval | Sales...', 'Travel Approval Record Page - L...', and 'Travel Approval | Salesforce'. The current tab is 'Travel Approval | Salesforce'. Below the navigation is a 'Search Setup' bar. The main content area is titled 'SETUP > OBJECT MANAGER' and shows 'Travel Approval'. On the left, a sidebar lists 'Details', 'Fields & Relationships', and 'Page Layouts'. Under 'Page Layouts', options include 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The right side displays a table for 'Page Layouts' with one item: 'Travel Approval Layout' created by 'VIGNAYA G S' on 17/10/2023 at 8:40 pm, last modified by 'VIGNAYA G S' on 19/10/2023 at 6:26 pm. The bottom status bar shows the date '19-10-2023' and the time '18:26'.

Build A Employee Travel Approval Application For Corporates



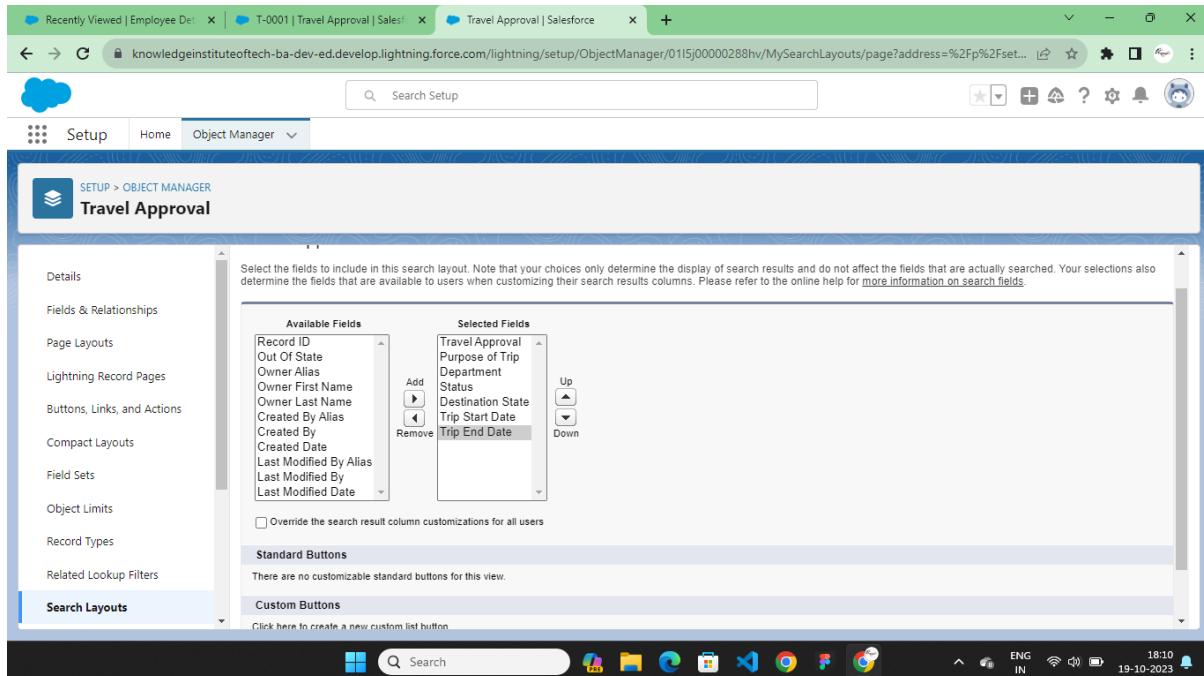
List View

A list view is a set of search conditions that displays records that match the search conditions.



Search Layout

Create search layouts for standard and custom objects, ensuring the layout shows users what's most relevant to them.



Travel Approvals									
Recently Viewed									
New Import Change Owner									
10 Items • Updated a few seconds ago									
Travel Appr...	Purpose of Trip	Department	Status	Destinati...	Trip Start Date	Trip End Date			
1 T-0004	Abernathy, Beatty and Leffler	Division of Finance	Approved	CA	09/03/2022	09/03/2022			
2 T-0011	Roberts Inc	Disability Determination Bureau	Submitted	CA	05/07/2022	09/07/2022			
3 T-0006	Weber-Herman	Disability Determination Bureau	Draft	OK	06/03/2022	07/03/2022			
4 T-0033	Olson-Schmidt	Audit Services	Approved	CA	22/11/2022	28/11/2022			
5 T-0029	Wyman Group	Audit Services	Pending Approval	FL	31/05/2022	04/06/2022			
6 T-0013	McKenzie Inc	Human Resources	Submitted	GA	27/08/2022	08/09/2022			
7 T-0009	Ebert Inc	Office of Early Childhood and Out-of-School Learning	Pending Approval	OK	23/04/2022	05/05/2022			
8 T-0003	Homenick, Waters and Gusikowski	Division of Disability and Rehabilitative Services	Approved	OK	03/04/2022	06/04/2022			
9 T-0002	Attend Party	Technology	Rejected	TN	24/10/2023	26/10/2023			
10 T-0001	Attend Dreamforce	Technology	Approved	CA	21/10/2023	24/10/2023			

2.6 Business Logic

Validation Rules

Validation rules let you set up business-specific criteria to prevent users from saving invalid data in one or more fields.

A validation rule evaluates a formula when a record is saved.

If a rule's criteria aren't met, users see a custom error message and the record doesn't save.

If a rule's criteria are met, the record saves.

Use validation rules to improve data quality by applying conditions, ensuring proper formatting, and enforcing consistency.

The screenshot shows a Salesforce browser interface. The address bar displays the URL: knowledgeinstituteoftech-ba-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03d5j000000RGcA. The top navigation bar includes tabs for Recently Viewed, Travel Approval Record Page, T-0001 | Travel Approval, Object Manager | Salesforce, and Travel Approval Record Page. Below the navigation is a search bar labeled "Search Setup". The main content area is titled "Object Manager" and shows a "Travel Approval Validation Rule". The rule details are as follows:

Validation Rule Detail	
Rule Name	Trip_end_date_after_start_date
Error Condition Formula	<code>Trip_End_Date__c < Trip_Start_Date__c</code>
Error Message	Trip end date must be greater than or equal to start date
Description	
Created By	VIGNAYA.G.S. 19/10/2023, 6:51 pm
Modified By	VIGNAYA.G.S. 19/10/2023, 6:51 pm

At the bottom of the page, there are "Edit" and "Clone" buttons. The status bar at the bottom right shows the system time as 18:51 and the date as 19-10-2023.

CHAPTER-3

USERS & DATA SECURITY

3.1 User Creation & Setup Approvals

Before customizing the travel app, first create a new user, Eric Executive, and set him up as manager. This involves assigning roles and profiles so that Eric has the correct permissions to approve travel requests.

Build A Employee Travel Approval Application For Corporates

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Recently Viewed | Employee Det | Users | Salesforce
- Search Bar:** Search Setup
- Left Sidebar:** Shows the navigation tree under "Users". The "User Management Settings" node is expanded, and the "Users" node is selected.
- Main Content Area:** The "Users" setup page is displayed. It includes sections for:
 - Single Sign On Information:** Federation ID (empty)
 - Locale Settings:** Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), Language (English)
 - Approver Settings:** Delegated Approver (empty), Manager (Eric Executive), Receive Approval Request Emails (Only if I am an approver)
- Bottom:** Save, Save & New, Cancel buttons. Taskbar with various icons and system status (ENG IN, 18:07, 19-10-2023).

The screenshot shows the Salesforce Setup interface with the following details:

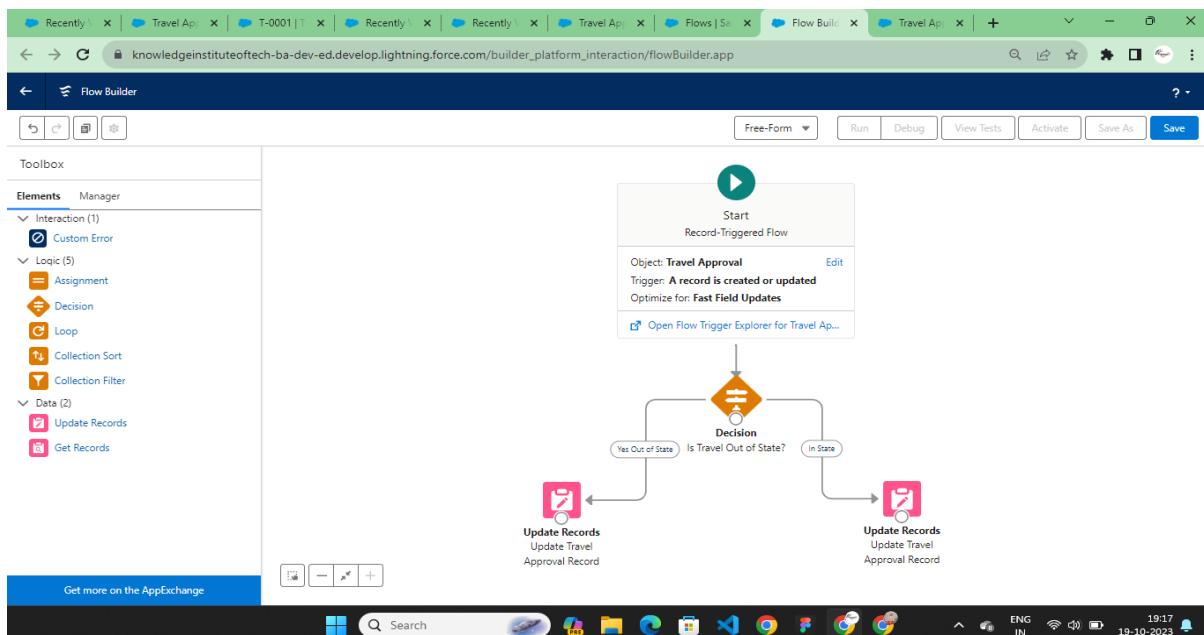
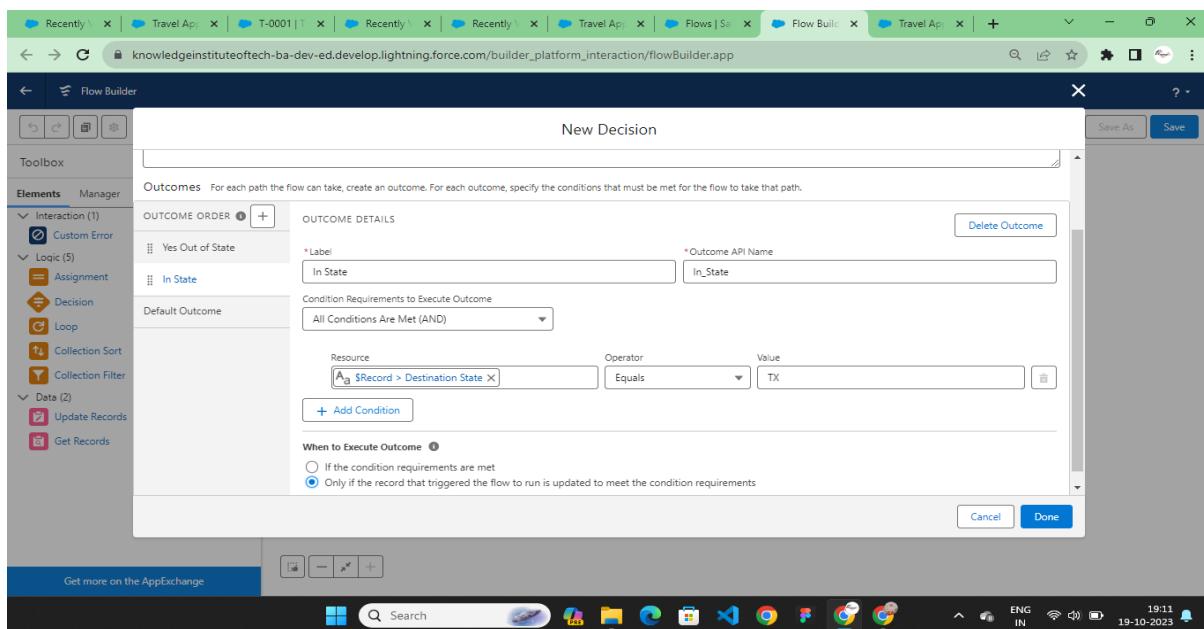
- Page Header:** Recently Viewed | Employee Det | Users | Salesforce
- Search Bar:** Search Setup
- Left Sidebar:** Shows the navigation tree under "Users". The "User Management Settings" node is expanded, and the "Users" node is selected.
- Main Content Area:** The "Users" setup page is displayed. It includes sections for:
 - Public Group Membership:** New Group, Public Group Membership Help
 - Queue Membership:** New Queue, Queue Membership Help
 - Team:** A table showing team members. One record is listed: Action (Edit), Name (Eric Executive), Title (empty), Alias (exec), Username (executive@ceo.com), Active (checked), Manager (checkbox checked).
 - Managers in the Role Hierarchy:** Managers in the Role Hierarchy Help
 - OAuth Apps:** OAuth Apps Help
- Bottom:** Save, Save & New, Cancel buttons. Taskbar with various icons and system status (ENG IN, 18:07, 19-10-2023).

CHAPTER-4

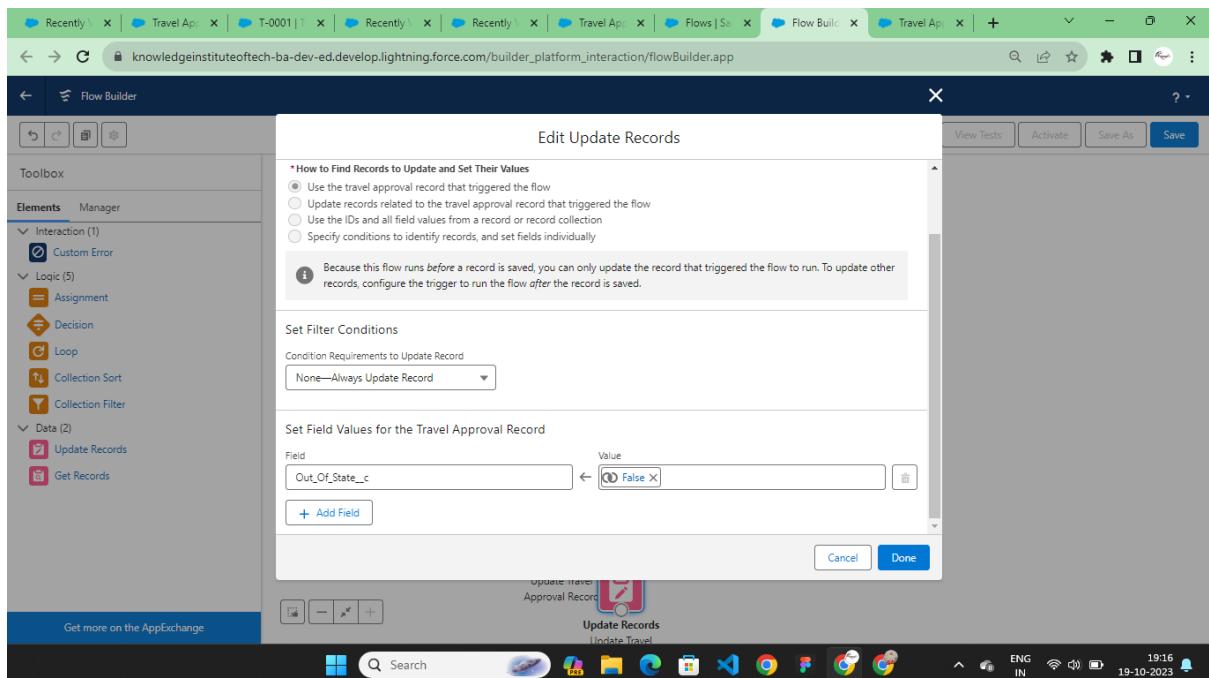
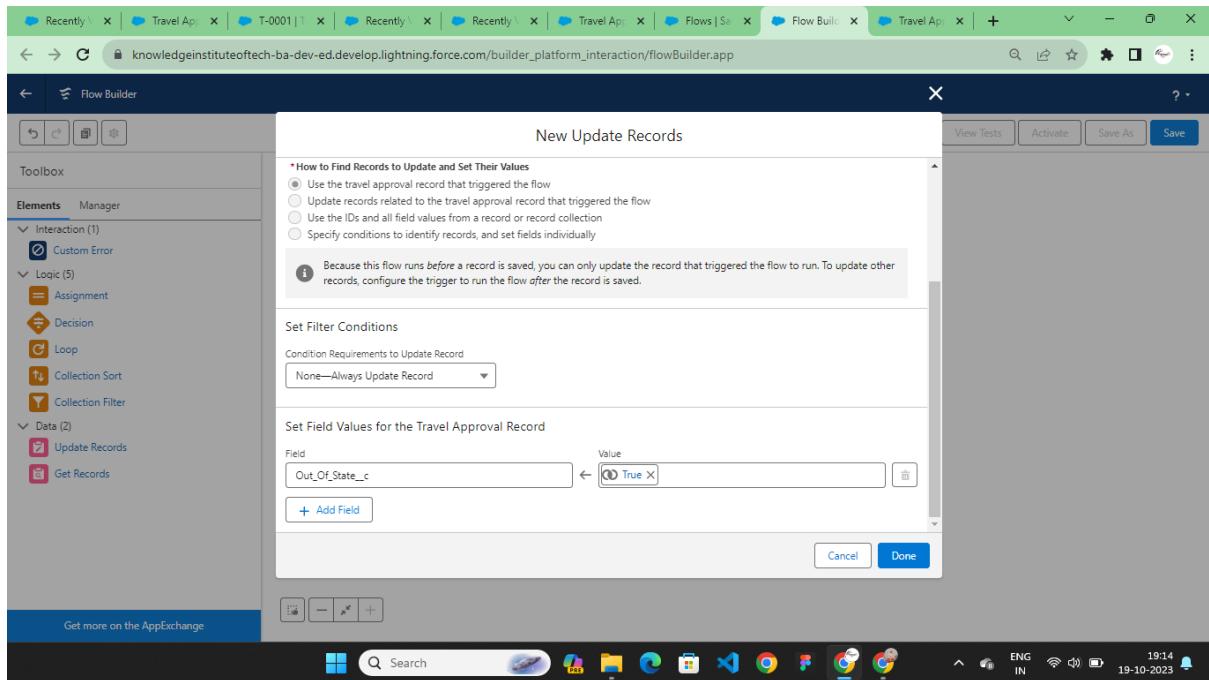
AUTOMATION

4.1 Flow

The last business rule functionality to implement before testing your application is a rule to set the Out-of-State checkbox field on the Travel Approval object if out-of-state travel has been chosen. Salesforce offers workflow capabilities that provide a declarative, drag-and-drop design environment to build our business process logic.



Build A Employee Travel Approval Application For Corporates

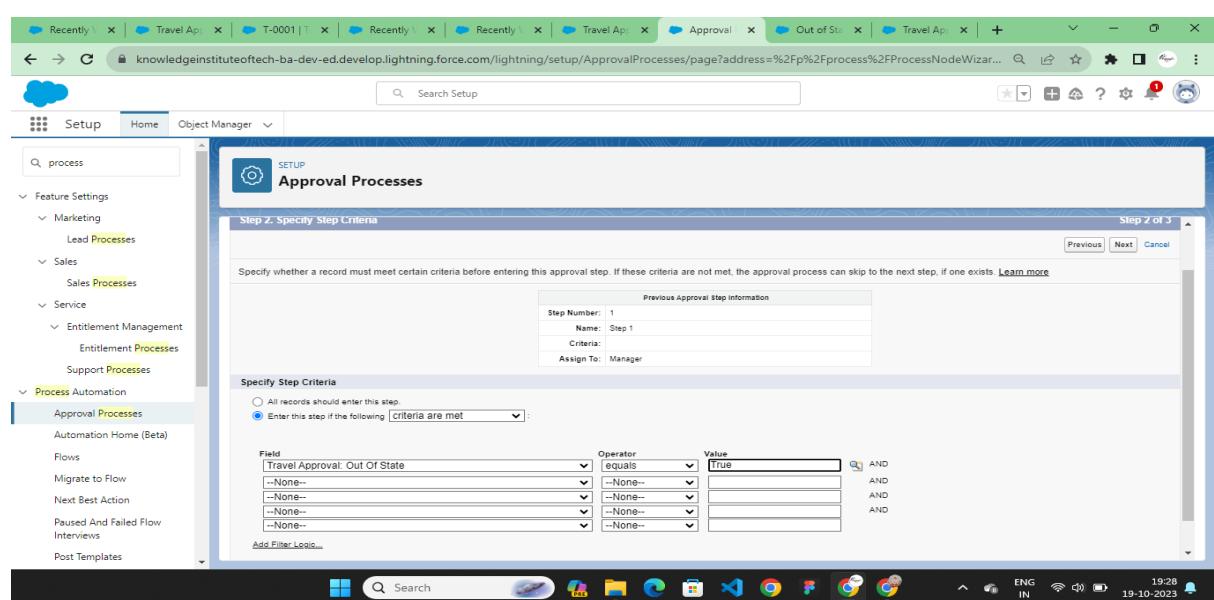
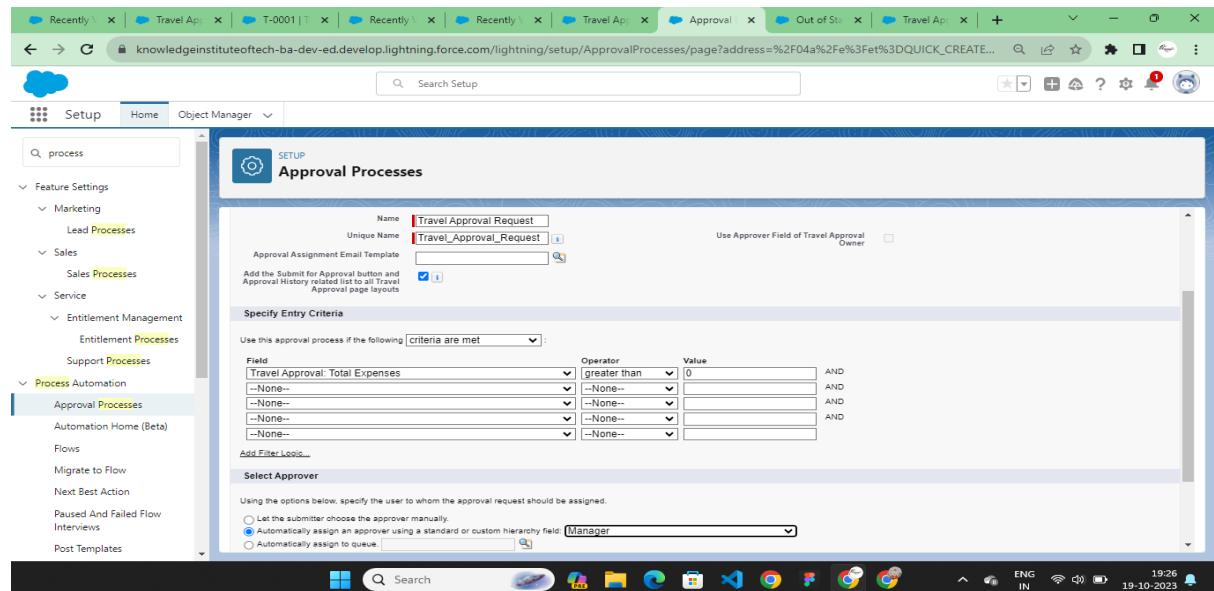


4.2 Approval Process

An approval process is an automated process your agency can use to approve records in Salesforce.

An approval process specifies the criteria a record must meet before it can be submitted for approval, the steps necessary for a record to be approved, and who must approve it at each step.

A step can apply to all records included in the process or just records that have certain attributes. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval.



Build A Employee Travel Approval Application For Corporates

The screenshot shows the Salesforce Setup interface with the following details:

- Page Title:** Approval Processes
- Section:** Approval Processes
- Form Fields:**
 - Step Number: 1
 - Name: Step 1
 - Criteria:
 - Assign To: Manager
- Select Approver:**
 - Let the submitter choose the approver manually.
 - Automatically assign using the user field selected earlier: (Manager)
 - Automatically assign to queue.
 - Automatically assign to approver(s).
 - User dropdown: VIGNAYA G S
 - Add Row Remove Row
 - When multiple approvers are selected:
 - Approve or reject based on the FIRST response.
 - Require UNANIMOUS approval from all selected approvers.
 - The approver's delegate may also approve this request.
- Reject Behavior:**

The screenshot shows the Salesforce Setup interface with the following details:

- Page Title:** Field Updates
- Section:** Approval Processes
- Form Fields:**
 - Name: Set Status to Approved
 - Unique Name: Set_Status_to_Approved
 - Description:
 - Object: Travel Approval
 - Field to Update: Status
 - Field Data Type: Picklist
 - Re-evaluate Workflow Rules after Field Change:
- Specify New Field Value:**
 - Picklist Options:
 - The value above the current one
 - The value below the current one
 - A specific value: Approval

Final Views

The screenshot shows the Salesforce Lightning interface for a Travel Approval record. The record ID is T-0001. The page includes fields for Trip Start Date (21/10/2023), Trip End Date (24/10/2023), and Destination State (CA). The owner of the record is VIGNAYA G S. The page also features a large blue background image of a topographic map.

The screenshot shows the Salesforce Lightning interface for a Travel Approval record. The record ID is T-0001. The page displays a table of expense items:

Expense Item Name	Expense Type	Amount
Airfare	Airfare	₹450.00
Hotel	Hotel	₹870.00

Build A Employee Travel Approval Application For Corporates

The screenshot shows a Salesforce Lightning interface for a travel approval application. The main page title is "Travel Approval T-0001". The "Details" tab is selected, displaying the following information:

- Travel Approval: T-0001
- Status: Draft
- Total Expenses: ₹1,320.00
- Status Indicator: (blue gear icon)
- Created By: VIGNAYA G S, 19/10/2023, 2:25 pm
- Last Modified By: VIGNAYA G S, 19/10/2023, 2:25 pm

In the "Trip Info" section, the "Purpose of Trip" is listed as "Attend Dreamforce". The "Out Of State" checkbox is checked. The "Destination State" is listed as "CA".

On the right side, there is a "Chatter" panel with a post from "VIGNAYA G S" asking, "Which department should I associate this travel request with?". A comment from "Eric Executive" says, "Likes this." and "Eric Executive" has responded with "an hour ago".

The bottom of the screen shows a Windows taskbar with various icons.

The screenshot shows the same Salesforce Lightning interface after the travel approval has been submitted. A modal window titled "Submit for Approval" is open, displaying the message "successfully submitted".

The "Details" tab still shows the travel approval record with the same information as before. The "Trip Info" section remains the same.

The "Chatter" panel shows the same post and comment from "VIGNAYA G S" and "Eric Executive".

The bottom of the screen shows a Windows taskbar with various icons.

Build A Employee Travel Approval Application For Corporates

The screenshot shows a travel approval application interface. At the top, there are tabs for 'Travel Approvals' and 'Expense Items'. Below this, the main content area displays two expense items: Airfare (Amount: ₹450.00) and Hotel (Amount: ₹870.00). To the right, a Chatter feed shows a post from 'VIGNAYA G S' asking which department to associate the travel request with. Eric Executive replies, 'Technology is the correct department.' A comment from Eric Executive is also visible.

The screenshot shows a travel approval record detail page. The record is for 'T-0002' and has been rejected. The 'Details' tab is selected, showing fields like Total Expenses (₹450.00), Status Indicator (Rejected), and Last Modified By (Eric Executive). The 'Chatter' tab shows a post from Eric Executive updating the record status to 'Submitted to Rejected'.

Build A Employee Travel Approval Application For Corporates

The screenshot shows a Salesforce Lightning application window titled "Travel Approvals". The top navigation bar includes links for "Travel Approvals", "Expenses", "Expense Items", "Departments", "Employee Details", "Reports", "Dashboards", and "Chatter". Below the navigation is a search bar and a toolbar with buttons for "New", "Import", and "Change Owner". The main content area displays a table titled "Recently Viewed" with 10 items. The columns are: Purpose of Trip, Department, Status, Destination, Trip Start Date, and Trip End Date. The data is as follows:

	Purpose of Trip	Department	Status	Destination	Trip Start Date	Trip End Date
1	T-0004 Abernathy, Beatty and Leffler	Division of Finance	Approved	CA	09/03/2022	09/03/2022
2	T-0011 Roberts Inc	Disability Determination Bureau	Submitted	CA	05/07/2022	09/07/2022
3	T-0006 Weber-Herman	Disability Determination Bureau	Draft	OK	06/03/2022	07/03/2022
4	T-0033 Olson-Schmidt	Audit Services	Approved	CA	22/11/2022	28/11/2022
5	T-0029 Wyman Group	Audit Services	Pending Approval	FL	31/05/2022	04/06/2022
6	T-0013 McKenzie Inc	Human Resources	Submitted	GA	27/08/2022	08/09/2022
7	T-0009 Ebert Inc	Office of Early Childhood and Out-of-School Learning	Pending Approval	OK	23/04/2022	05/05/2022
8	T-0003 Homenick, Waters and Gusikowski	Division of Disability and Rehabilitative Services	Approved	OK	03/04/2022	06/04/2022
9	T-0002 Attend Party	Technology	Rejected	TN	24/10/2023	26/10/2023
10	T-0001 Attend Dreamforce	Technology	Approved	CA	21/10/2023	24/10/2023

The bottom of the screen shows a Windows taskbar with various icons and the date/time: 19-10-2023, 20:30.

The screenshot shows a Salesforce Chatter feed. On the left, there's a sidebar with "What I Follow", "To Me", "Bookmarked", "Company Highlights" (which is selected), "My Drafts", "STREAMS" (with a note about creating one), and "RECENT GROUPS" (with a note about joining some now). The main feed has tabs for "Post", "Poll", and "Question". A post from "T-0001 — VIGNAYA GS" (posted 1h ago) asks: "@Eric Executive Which department should I associate this travel request with?". Below the post are "Like" and "Comment" buttons, and a note that "Eric Executive likes this." A comment from "Eric Executive" (2 hours ago) says: "Technology is the correct department." There's also a "Write a comment..." input field. To the right, there's an "Einstein Recommendations" sidebar with three suggestions: "Eric Executive Your manager", "Integration User Joined in the last week", and "Security User Joined in the last week", each with "+ Follow" and "Skip" buttons. The bottom of the screen shows a Windows taskbar with the date/time: 19-10-2023, 20:22.

CHAPTER-5

REPORTS & DASHBOARD

5.1 Reports

A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits.

The report builder provides a drag-and-drop interface to easily build and customize your reports.

The screenshot shows the Salesforce Reports page. At the top, there is a navigation bar with tabs for Recently Viewed, Travel Approval, Approval Processes, Reports, and another Reports tab. Below the navigation bar is a search bar and a toolbar with various icons. The main content area displays a table of recent reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. There are filters on the left for Reports, Recent, and other categories like Created by Me, Private Reports, Public Reports, All Reports, Folders, and Favorites. The table lists three reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Travel Requests by Month		Public Reports	VIGNAYA G S	19/10/2023, 8:13 pm	<input type="checkbox"/>
Created by Me	Travel Requests by Department		Public Reports	VIGNAYA G S	19/10/2023, 8:02 pm	<input type="checkbox"/>
Private Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	17/10/2023, 8:01 pm	<input type="checkbox"/>

At the bottom of the page, there is a taskbar with various application icons and system status indicators.

Build A Employee Travel Approval Application For Corporates

The screenshot shows a Salesforce report titled "Travel Requests by Department". The report displays travel approvals across different departments. Key details include:

Department	Trip ID	Status	Out Of State	Destination State	Trip Start Date	Trip End Date
Audit Services (4)	T-0029	Pending Approval	<input checked="" type="checkbox"/>	FL	31/05/2022	04/06/2022
	T-0033	Approved	<input checked="" type="checkbox"/>	CA	22/11/2022	28/11/2022
	T-0048	Rejected	<input checked="" type="checkbox"/>	CA	07/04/2022	19/04/2022
	T-0005	Rejected	<input checked="" type="checkbox"/>	FL	09/08/2022	15/08/2022
Subtotal					4	
Disability Determination Bureau (4)	T-0030	Rejected	<input type="checkbox"/>	TX	15/09/2022	15/09/2022
	T-0041	Rejected	<input checked="" type="checkbox"/>	OK	20/12/2022	20/12/2022
	T-0006	Draft	<input checked="" type="checkbox"/>	OK	06/03/2022	07/03/2022
	T-0011	Submitted	<input checked="" type="checkbox"/>	CA	05/07/2022	09/07/2022
Subtotal					3	
Division of Aging (3)	T-0035	Rejected	<input checked="" type="checkbox"/>	CA	08/06/2022	22/06/2022
	T-0046	Rejected	<input type="checkbox"/>	TX	11/02/2022	11/02/2022
	T-0017	Rejected	<input checked="" type="checkbox"/>	GA	24/12/2022	08/01/2023
Subtotal					2	

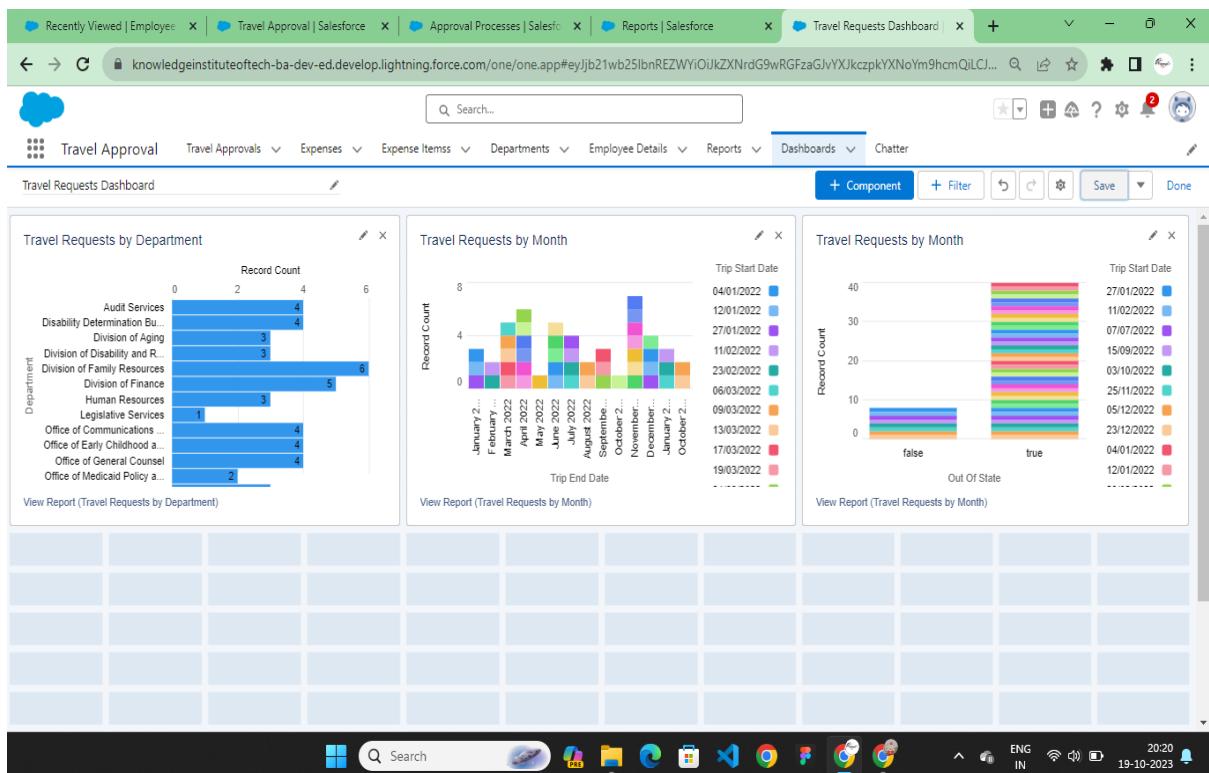
Row Counts: 48, Total Out Of State: 40.

The screenshot shows the Report Builder interface for creating a "New Travel Approvals Report". The report structure is defined as follows:

- Fields:**
 - Groups: Trip End Date, Trip Start Date, Department, Status, # Out Of State, Destination State.
 - Columns: Travel Approval: Travel Approval, Department, Status, Out Of State, Destination State.
- Filters:** Trip End Date, Trip Start Date, Department, Status, # Out Of State, Destination State.
- Report Preview:** Shows a limited number of records from January to June 2022, grouped by department and status.

5.2 Dashboard

A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.



CHAPTER-6

CONCLUSION

In conclusion, the development of an employee travel approval application for corporates is a critical step towards streamlining and enhancing the travel management process within organizations. This application serves as a centralized, efficient, and user-friendly tool for managing employee travel requests, approvals, and associated processes.

In building an employee travel approval application, it's essential to engage relevant stakeholders, including HR, finance, and IT teams, to ensure that the application aligns with organizational goals and requirements. Furthermore, thorough testing and training should be conducted to guarantee a smooth and successful implementation.

By addressing these key points and creating a tailored travel approval application that aligns with the unique needs and policies of the corporate, organizations can enhance their travel management processes, improve cost control, and provide a more satisfying experience for employees and travel administrators alike.

CHAPTER-7

PROJECT DEMONSTRATION

Github:

<https://github.com/Harish6379/Naanmudhalvan-salesforce-NM2023TMID01395-kiot>

Demo Link:

<https://drive.google.com/file/d/1hbA9Fp4ibHZgm1tXGoPAczh2-Y8-vlz7/view?usp=drivesdk>