

NAANMUDHALVAN PROJECT REPORT

BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

INTRODUCTION

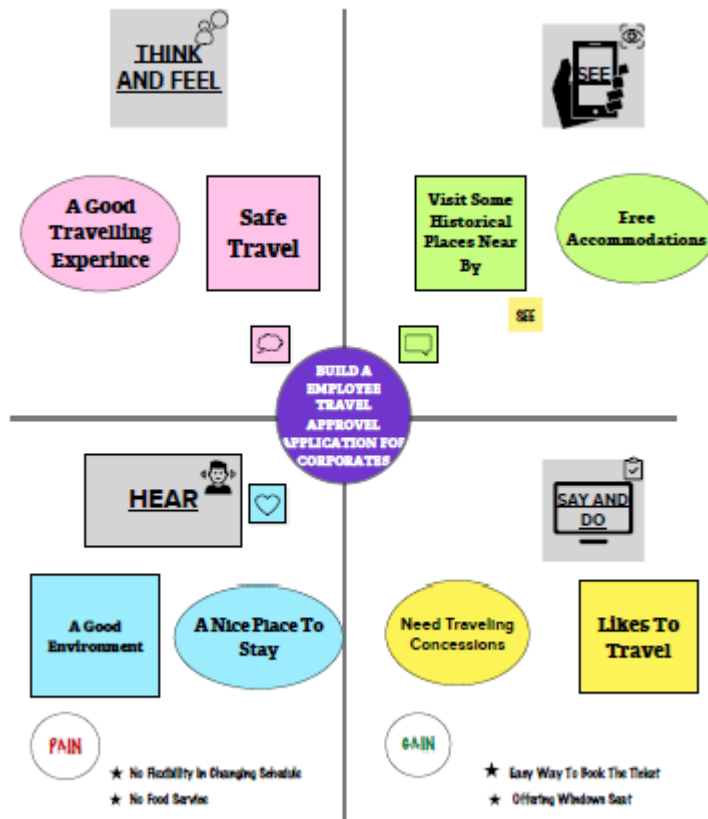
Nowadays, it is common for corporate employees to travel for their company's benefit. This project helps the company to ease the travel arrangements for their employees and sort-out the expenses annually. By using this app, the company can make changes to the travel budget and, also the company can utilize their employees' travel records

PURPOSE

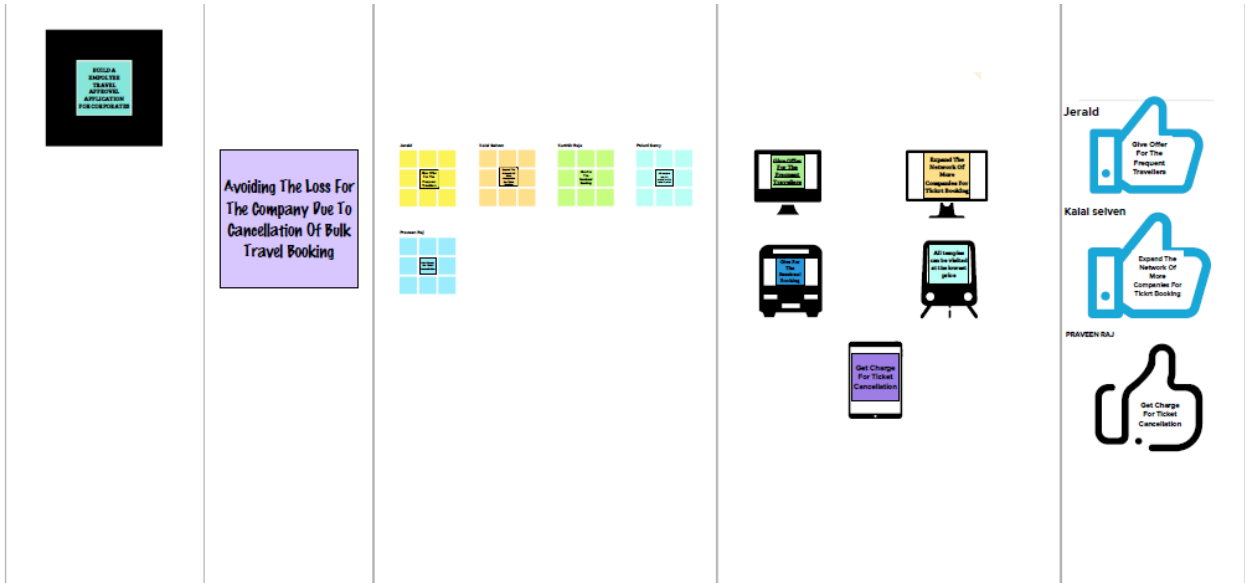
This app is designed with the purpose of making the employee's trip a hassle-free one. Tracking employees' travel throughout the year is also possible for corporate companies and helps companies to plan the budget according to the travel expenses record. It also helps the company to approve or reject the application as per the travel requirements.

PROBLEM DEFINITION AND DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



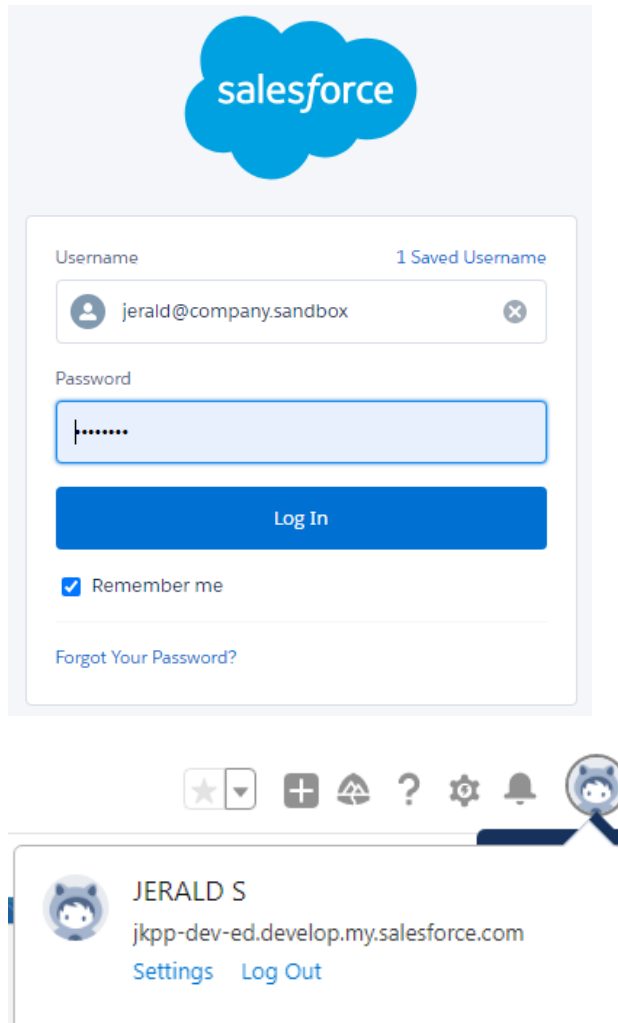
3 RESULT

3.1 Data Model:

Obj1	<table border="1"> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Department</td><td>Custom Object Definition</td></tr> </table>	Field label	Data type	Department	Custom Object Definition
Field label	Data type				
Department	Custom Object Definition				
Obj2	<table border="1"> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Travel Approval</td><td>Custom Object Definition</td></tr> </table>	Field label	Data type	Travel Approval	Custom Object Definition
Field label	Data type				
Travel Approval	Custom Object Definition				
Obj3	<table border="1"> <tr> <th>Field label</th><th>Data type</th></tr> <tr> <td>Expense Item</td><td>Custom Object Definition</td></tr> </table>	Field label	Data type	Expense Item	Custom Object Definition
Field label	Data type				
Expense Item	Custom Object Definition				

3.2 ACTIVITY AND SCREENSHOT

Creating a Account in salesforce org:



The screenshot displays the Salesforce login interface. At the top is the Salesforce logo. Below it is a login form with a 'Username' field containing 'jerald@company.sandbox' and a 'Password' field with masked characters. A 'Log In' button is positioned below the password field. A 'Remember me' checkbox is checked. A link for 'Forgot Your Password?' is at the bottom of the form. Below the login form is a navigation bar with icons for home, search, and other functions. A user profile dropdown is open, showing the user's name 'JERALD S', their email 'jkpp-dev-ed.develop.my.salesforce.com', and links for 'Settings' and 'Log Out'.

Username 1 Saved Username

jerald@company.sandbox

Password

Log In

☒ Remember me

[Forgot Your Password?](#)

JERALD S
jkpp-dev-ed.develop.my.salesforce.com
[Settings](#) [Log Out](#)

Object Selection

Most Recently Used

5 items

NAME	TYPE
Department	Custom Object Definition
Travel Approval	Custom Object Definition
Expense Item	Custom Object Definition
Department	Custom Object Definition





What is a tab

Custom Tabs

[Help for this Page](#) ?

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs			
		New	What Is This?
Action	Label	Tab Style	Description
Edit Del	customers1	 Box	
Edit Del	departments	 Chalkboard	
Edit Del	Expense Items	 Airplane	
Edit Del	Travel Approvals	 Car	

Creating Fields& relationships

Fields & Relationships

5 Items, Sorted by Field Label

[New](#)

[Deleted Fields](#)

[Field Dependencies](#)

[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(16, 2)		<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Travel Approval Name	Name	Text(80)		<input checked="" type="checkbox"/>

Q user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

SETUP

Users

User Detail

Edit | Sharing | Reset Password | Freeze

Name	gerald s	Role	CEO
Alias	js	User License	Salesforce
Email	selvajerald13@gmail.com	Profile	System Administrator
Username	selvajerald13@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16812900749208944346	Marketing User	<input type="checkbox"/>
Title	travel apporval	Offline User	<input type="checkbox"/>
Company	jkpp	Knowledge User	<input type="checkbox"/>
Department	travel apporval	Flow User	<input type="checkbox"/>
Division	trichy	Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>

User customization

SETUP > OBJECT MANAGER

Travel Approval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Page Layouts

1 Items, Sorted by Page Layout Name

Q Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Travel Approval Layout	JERALD S, 3/24/2023, 3:01 AM	JERALD S, 4/12/2023, 2:23 AM

Add business logic to travel app

Field Label	Trip End Date
Data Type	Date/Time
Field Name	Trip_End_Date
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field

Page Layout Name
Travel Approval Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Field Label	Status Indicator
Data Type	Formula
Field Name	Status_Indicator
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.


To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field

Page Layout Name
<input checked="" type="checkbox"/> Account (Marketing) Layout
<input checked="" type="checkbox"/> Account (Sales) Layout
<input checked="" type="checkbox"/> Account (Support) Layout
<input checked="" type="checkbox"/> Account Layout



Account

Grand Hotels & Resorts Ltd 

Type

Phone

Website

Account Owner

Account Site

Industry

 [JERALD S](#) 

Related

Details

News


Account Owner

 [JERALD S](#) 

Rating



Account Name

Grand Hotels & Resorts Ltd 

Phone



Parent Account



Fax



Account Number



Website



Account Site



Ticker Symbol



Type



Ownership



Industry



Employees



Annual Revenue



SIC Code



Total Expenses

Total Expenses

0

Status Indicator



Billing Address



Shipping Address



Customer Priority



SLA



SLA Expiration Date



SLA Serial Number



Number of Locations




Upsell Opportunity




Active



Created By

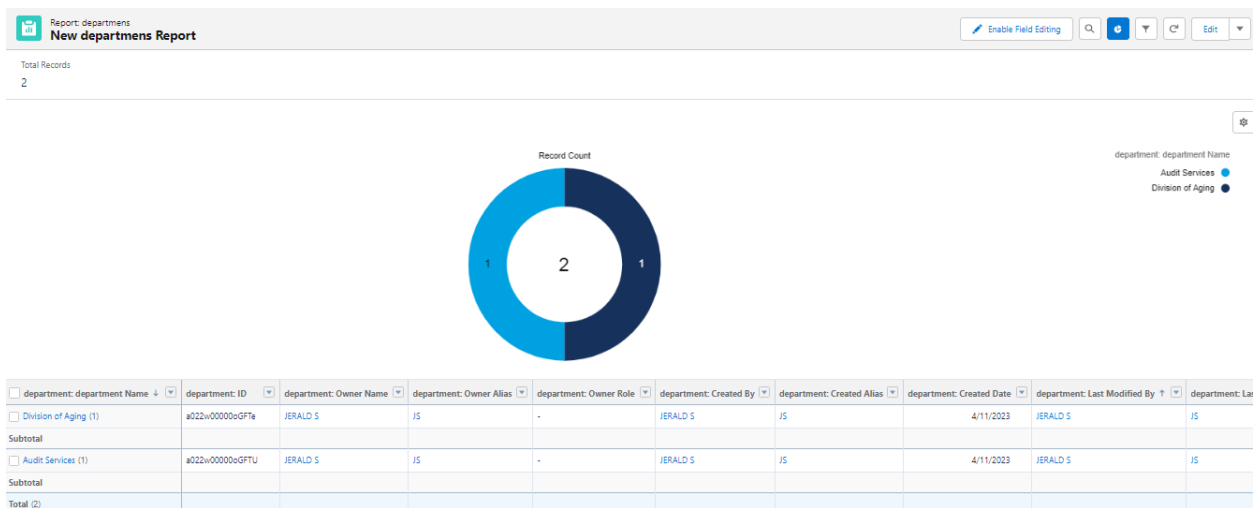
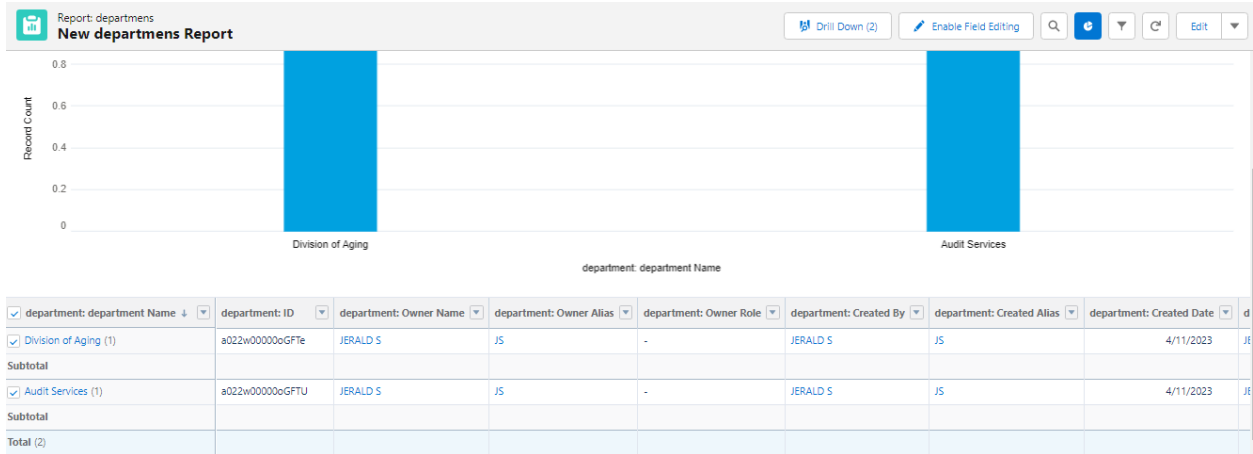
 [JERALD S](#), 4/18/2023, 10:48 AM

Last Modified By

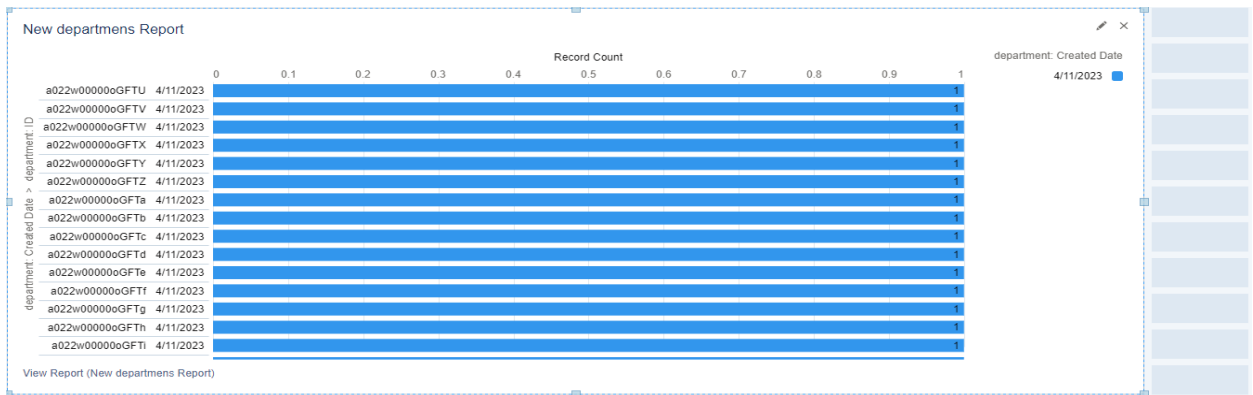
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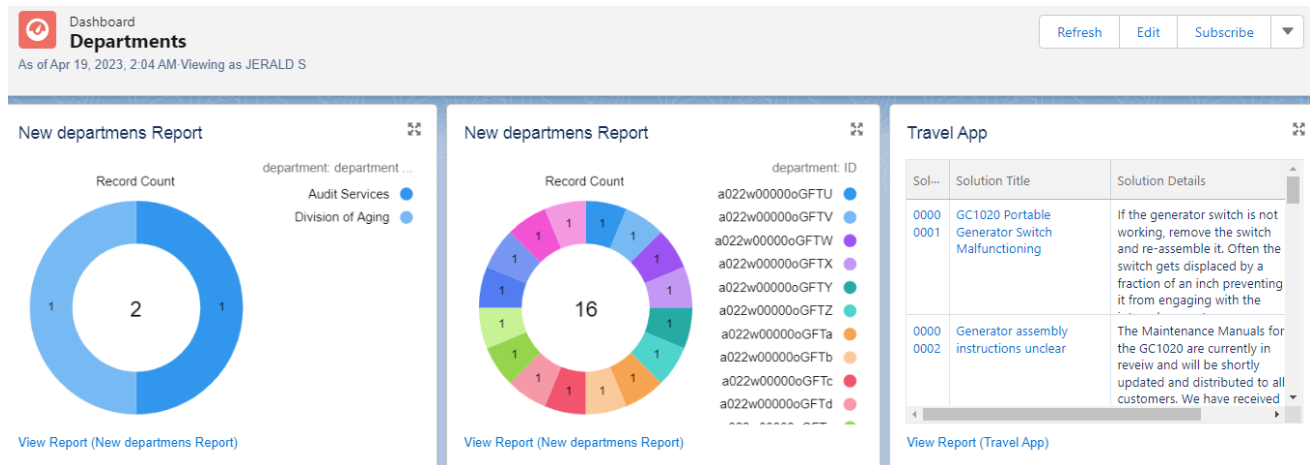
Description

Add report



Dashboard





4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/jeras15>

Team Member 1 -<https://trailblazer.me/id/palani16>

Team Member 2 -<https://trailblazer.me/id/pravv31143>

Team Member 3 –<https://trailblazer.me/id/kraja273>

ADVANTAGES & DISADVANTAGES

ADVANTAGES

1. This application is used to track the travel records of employees for the future reference.
2. Corporate companies can prepare the expenditure plan well in advance.
3. They can approve the employees travel application with the standard requirements.
4. Every process goes on-line sotransparency in the process is maintained.

DISADVANTAGES

1. Oncethe employee gets travel approval, he/she is not able to change the travel date in the schedule.
2. Accommodation preferences are selected by the company only.

3. Employees can spend on their food and miscellaneous expenses within the allotted amount only.
4. If any loss of their belongings during the stay, the company cannot compensate.

APPLICATIONS

This app is mainly useful for all types of corporate company for their employees' travel in and out of the country. They need a quick process in the travel planning. So, this app is designed to meet their requirements.

CONCLUSION

This project can be implemented effectively for those who need to make travel arrangement for their employees. The companies can save their time from planning the trip related work. This application can also update the schedule as per the companies' requirements. Each and every information is stored and travel records are maintained for the future reference.

FUTURE SCOPE

This app provides enough room for additional changes to the companies' choice. The company can modify and add their rules and regulations for their employees' travel approval.