

Project Report Template

Introduction:

Overview:

A Travel approval application is a function within expense management software. What this allows you to do is set an approval system before funds from your corporate credit program are given to your employees.

So now, instead of hoping that all your employees have read the financial company policy and are accustomed to them, you can make sure that no money is spent without financial controllers checking the transactions first. The best part is that all of this can be done remotely from wherever you are, using just the volopay platform.

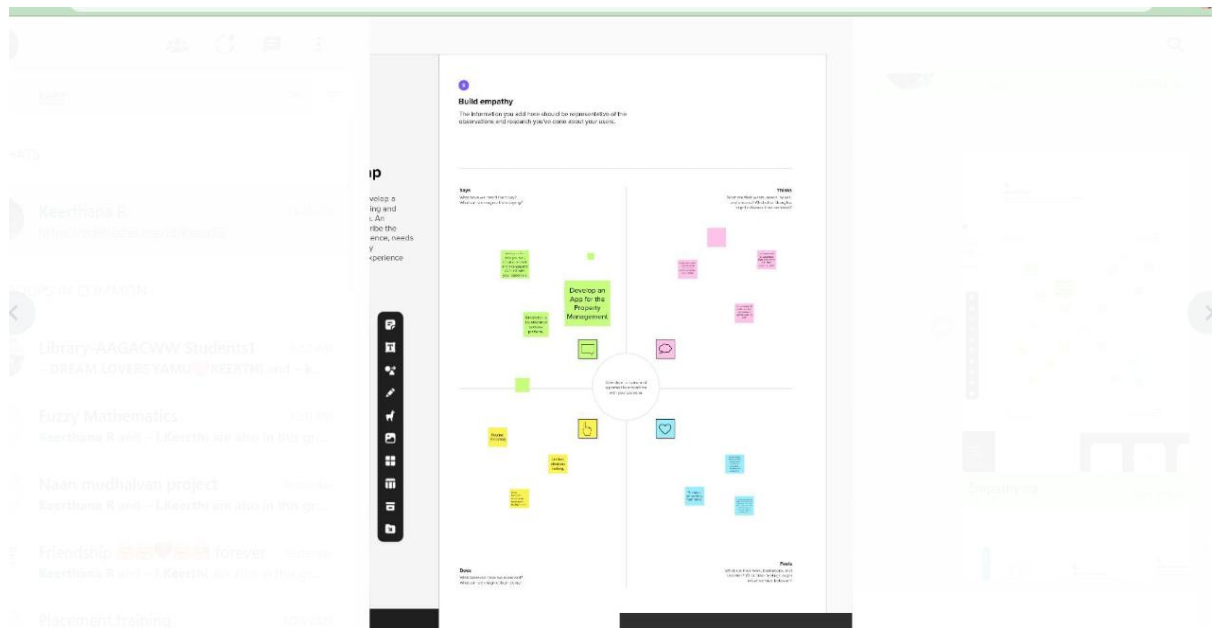
For example, if John is a sales employee at your company who requires funds to travel to a client location, he must first issue a request on the volopay platform. Once the request is approved by the approvers your organization had set previously, only then will the funds be transferred to John's volopay corporate credit card.

Purpose:

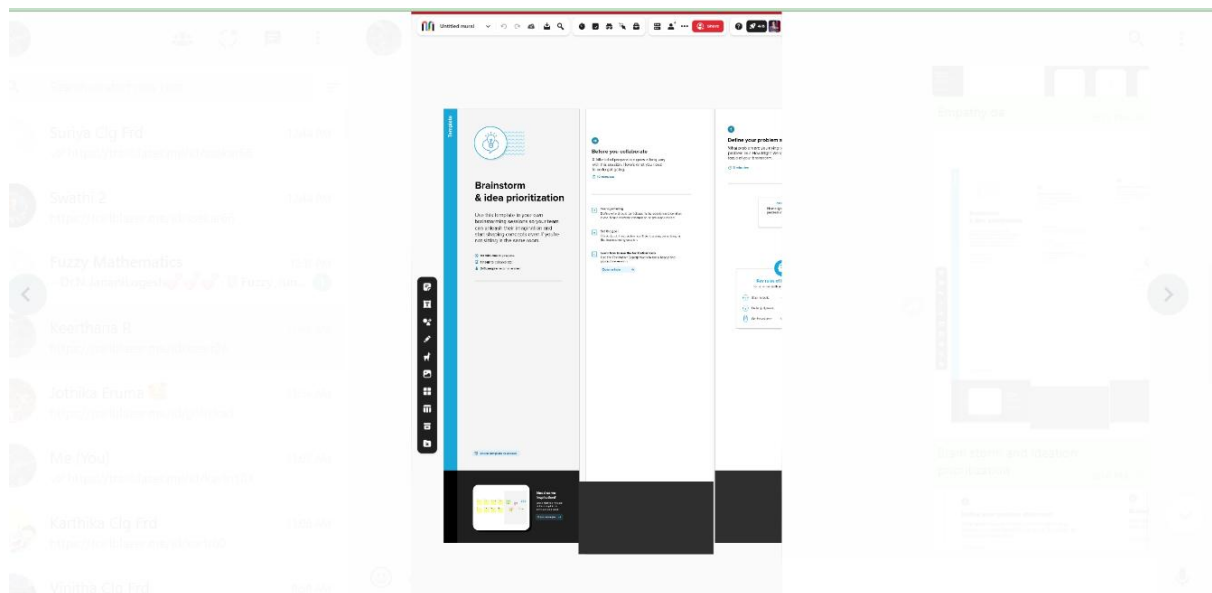
Travel request forms are designed to give management an overview of the intended business trip from both a cost and strategic point of view. The fields that typically appear on a travel request form include; Employee name and contact information.

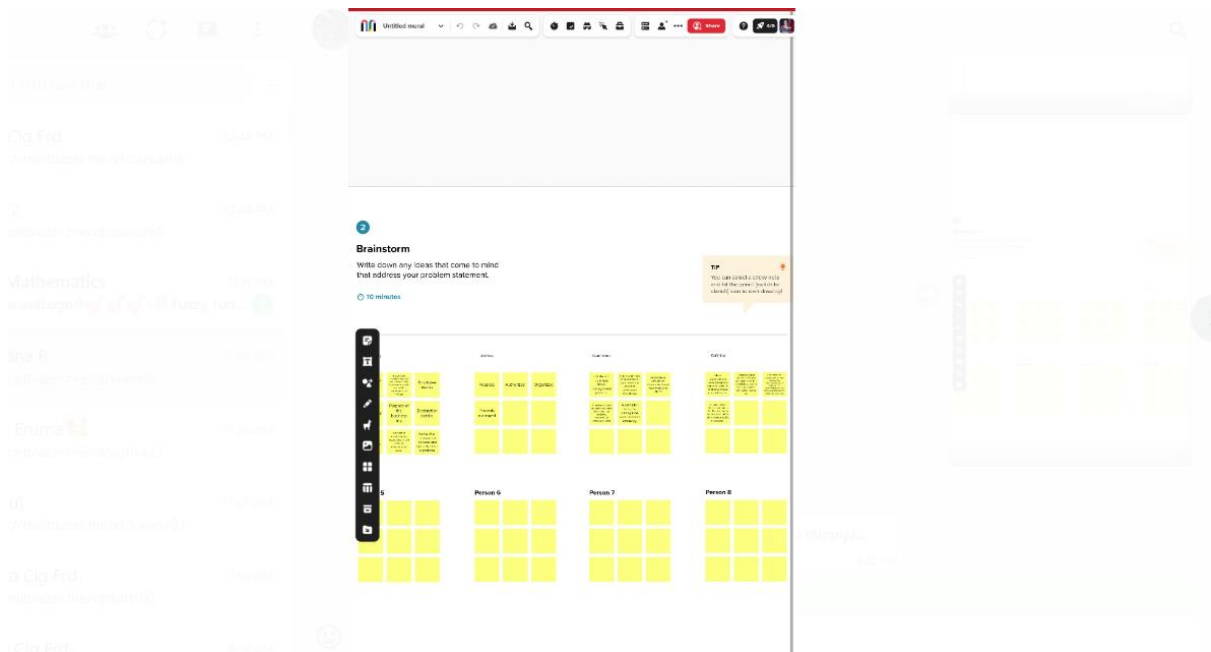
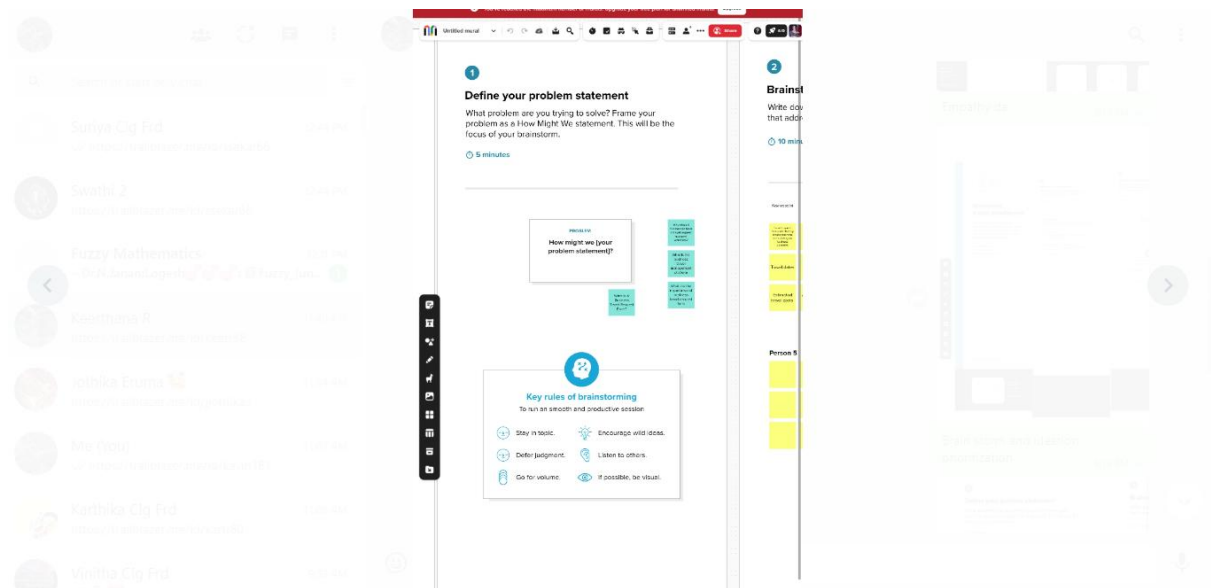
2.Problem Definition and Design Thinking:-

2.1. Empathy Map



2.2 Ideation and Brainstorming map Screenshot:





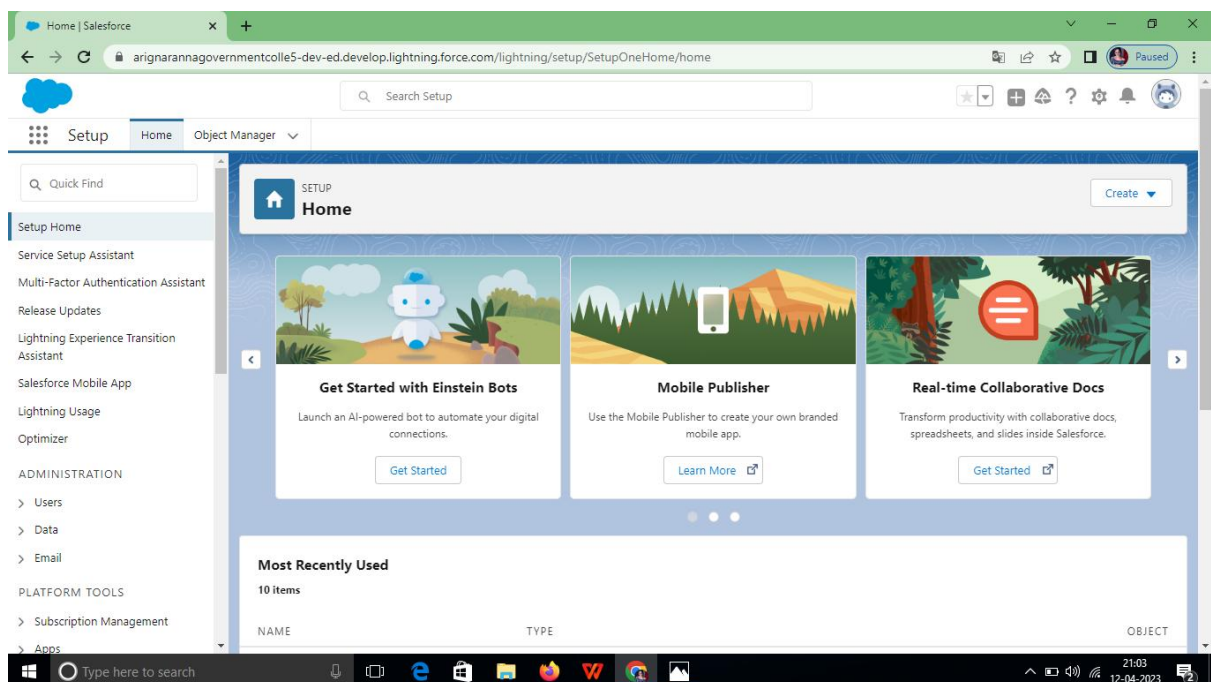
3. Result:-

3.1 Data Model:-

Object Name	Fields in the object
Object-1	Field label:Amount Data Type:currency
Object-2	Field Label:Expense type Data Type:Piclist
Object-3	Field label:Travel Approval

Data Type: Master-Detail Relationship

Create salesforce Org-creating Developer Account:



Custom Object Creation:

The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: `arignarannagovernmentcolle5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page title is "Object Manager" with a subtitle "51+ Items, Sorted by Label". A search bar labeled "Quick Find" is present. Below the header is a table listing various objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account__c	Custom Object		10/04/2023	✓
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
		Standard Object			

Create Department Object:

The screenshot shows the details page for the "department" object in Salesforce Object Manager. The browser address bar displays the URL: `arignarannagovernmentcolle5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003k2Aa/Details/view`. The page title is "department". A sidebar on the left lists various configuration options: 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, and List View, Button Layout. The main content area is titled "Details" and contains the following information:

- Description: (Empty field)
- 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

Create Travel Approval Object:

The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: `arignarannagovernmentcolle5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page title is "Object Manager" with a subtitle "2 Items, Sorted by Label". A search bar contains "travel approval". A dropdown menu shows "travel approval" and "travel approval object". The table below lists two custom objects:

LABEL	API NAME	TYPE	DESCRIPTION	LA	DEPLOYED
Travel Approval	Travel_Approval__c	Custom Object		25/03/2023	✓
Travel approval	Travel_approvals__c	Custom Object	Trip-05.04.2023_c< Trip-05.04.2023_c.	10/04/2023	✓

What is a Tab?

The screenshot shows the Salesforce Tabs setup page. The browser address bar displays the URL: `arignarannagovernmentcolle5-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r2w0000018dhq%3Fsetupid%3DCu...`. The page title is "Tabs" with a subtitle "Custom Object Tab". The left sidebar shows a search bar with "tab" and a list of tabs: "Loaded Console Tab Limit", "Rename Tabs and Labels", and "Tabs". The main content area shows the "Events" custom object tab. Below the title, it says "Below is the information for the custom tab. Click Edit to change the custom tab." The "Custom Tab Definition Detail" section includes a table with the following information:

Tab Label	Events	Tab Style	Computer
Object	Event	Splash Page Custom Link	
Description			
Created By	kaviyaseelvi.P.N. 24/03/2023, 11:54 am	Modified By	kaviyaseelvi.P.N. 24/03/2023, 11:54 am

Users:

Users | Salesforce

arignarannagovernmentcolle5-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

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

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d2w00000roag9eaf.1jc2gduzkz4@chatter.salesforce.com		✓	Chatter Free User
Edit	P.N. kaviyaseelvi	KPN	kaviya@chikka@organization.com		✓	System Administrator
Edit	sreen.kav	kovee	nkrarthika29@gmail.com	CEO	✓	Cross Org Data Proxy User
Edit	User Integration	integ	integration@00d2w00000roag9eaf.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00d2w00000roag9eaf.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

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

Add Business Logic to Travel App:

Travel approval | Salesforce

arignarannagovernmentcolle5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kZ8r/ValidationRules/view

Setup Home Object Manager

Search Setup

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

List View Button Layout

Validation Rules

1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Travel_approval	Owner	80%	✓	kaviyaseelvi P.N., 10/04/2023, 2:29 pm

Report:

The screenshot shows the Salesforce Reports interface. The browser address bar displays the URL: `arignarannagovernmentcolle5-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru`. The page title is "Reports | Salesforce". The navigation bar includes "travel approval", "Dashboards", "Reports", "Events", "Travel Approvals", and "Travel approvals". The "Reports" section is active, showing a "Recent" list with 2 items. A search bar for "Search recent reports..." is present, along with "New Report" and "New Folder" buttons. The table below lists the reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Reports Report		Private Reports	kaviyaselvi P.N.	12/4/2023, 2:28 pm	
Created by Me	Report		Private Reports	kaviyaselvi P.N.	12/4/2023, 1:52 pm	

The left sidebar contains navigation links for "REPORTS", "FOLDERS", and "FAVORITES". The Windows taskbar at the bottom shows the time as 21:42 on 12-04-2023.

Dashboards:

The screenshot shows the Salesforce Dashboards interface. The browser address bar displays the URL: `arignarannagovernmentcolle5-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru`. The page title is "Dashboards | Salesforce". The navigation bar includes "travel approval", "Dashboards", "Reports", "Events", "Travel Approvals", and "Travel approvals". The "Dashboards" section is active, showing a "Recent" list with 3 items. A search bar for "Search recent dashboards..." is present, along with "New Dashboard" and "New Folder" buttons. The table below lists the dashboards:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	dashboard		Private Dashboards	kaviyaselvi P.N.	12/4/2023, 2:30 pm	
Created by Me	dashboard		Private Dashboards	kaviyaselvi P.N.	12/4/2023, 2:29 pm	
Private Dashboards	kaviyaselvi		Private Dashboards	kaviyaselvi P.N.	12/4/2023, 2:24 pm	

The left sidebar contains navigation links for "DASHBOARDS", "FOLDERS", and "FAVORITES". The Windows taskbar at the bottom shows the time as 21:44 on 12-04-2023.

Trailhead Profile public URL

Team Lead- <https://trailblazer.me/id/kavin181>

Team member 1- <https://trailblazer.me/id/kartr80>

Team member 2- <https://trailblazer.me/id/jjothika3>

Team member 3- <https://trailblazer.me/id/keerr36>

Advantages:

1. Approvals on time:

The entire process of planning and managing a trip is a long and stressful process. This means your employees need to spend hours looking for travel options, By automating the approval workflow, you can simplify the process. Your employees no longer have to run behind a manager or finance team for approvers.

2. Customize approval application:

The approval process can differ from company to company. Using expense management software, you can customize the workflow based on your organization. You can set up multiple workflows within your organization, that will allow you to better manage your expense approval requests.

3. Increase compliance and reduce costs:

A well-defined expense approval workflow will help in reducing non-policy-compliant expenses in your firm. You can now prevent expense frauds such as duplicate bills, overstated expenses, non-policy complaint items, manipulated invoices, etc.

4. Faster process:

Most expense management software comes with mobile capabilities. This means approvers get notified of the travel requests sent by employees, which they can approve or reject fast. This reduces approval time and enhances the expense management process in your firm.

Disadvantages:

if you do not have a travel request approval workflow in place, your company could face the following challenges:

- It isn't easy to manage expenses with a traditional expense approval process where spreadsheets and emails are used.
- The key information will not reach the relevant person if emails and spreadsheets are used.
- Without a travel request approval workflow, you have no control over travel costs and could overshoot the budget.
- Without proper approval and planning, there are chances for last-minute chaos

- Things are slow in a manual expense approval process

Conclusion:

In the project we are create application for the travel approval for corporate company and it is very use full for every one.

Features:

- If the requester specifies the estimated travel cost.
- The estimated travel cost is less than the maximum travel cost allowed.
- Travel advance requested by the requester is less than a predefined value.