

# **BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES**

## **1 . INTRODUCTION**

### **1.1 Build A Employee Travel Approval Application For Corporates**

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 will also help to those professionals who are 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.

### **1.2 Purpose**

The purpose of travel policy is to ensure that the travel expense of the company is controlled by establishing certain standards.

## **2 . PROBLEM DEFINITION & DESIGN THINKING**

### **2.2 Empathy Map**

**Template**



## Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

**Build empathy**  
The information you add here should be representative of the observations and research you've done about your users.

**Says**  
What have we heard them say? What does it make them sound?

**Thinks**  
What are their wants, needs, fears, and dreams? What other thoughts might influence their behavior?

**Does**  
What behaviors have we observed? What can we infer from this?

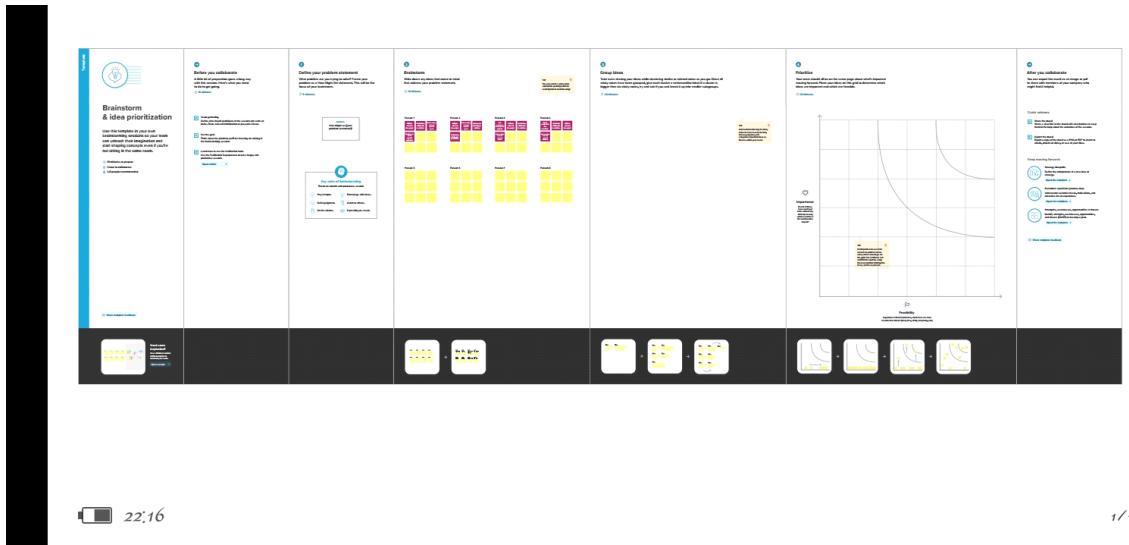
**Fails**  
What are their fears/ frustrations, and aspirations? What influenced their behavior?

**Share template feedback:**

Need some inspiration?  
See a finished version of the template to kickstart your work.  
[Open example →](#)



## 2.2 Ideation & Brainstorming Map



## 3 . RESULT

### 3.1 Data Model

Object Name	Fields In The Object	
Object 1	Field label	Data type
	Department	Currency
Object 2	Field label	Data type
	Expence item	Pick list

Object 3	Field label	Data type
	Travel approval	Master-detail relationship

### 3.2 Activity & Screenshots

#### Milestone 1 - Create Salesforce Org:

*Creating Developer Account Creating a developer org in salesforce.*

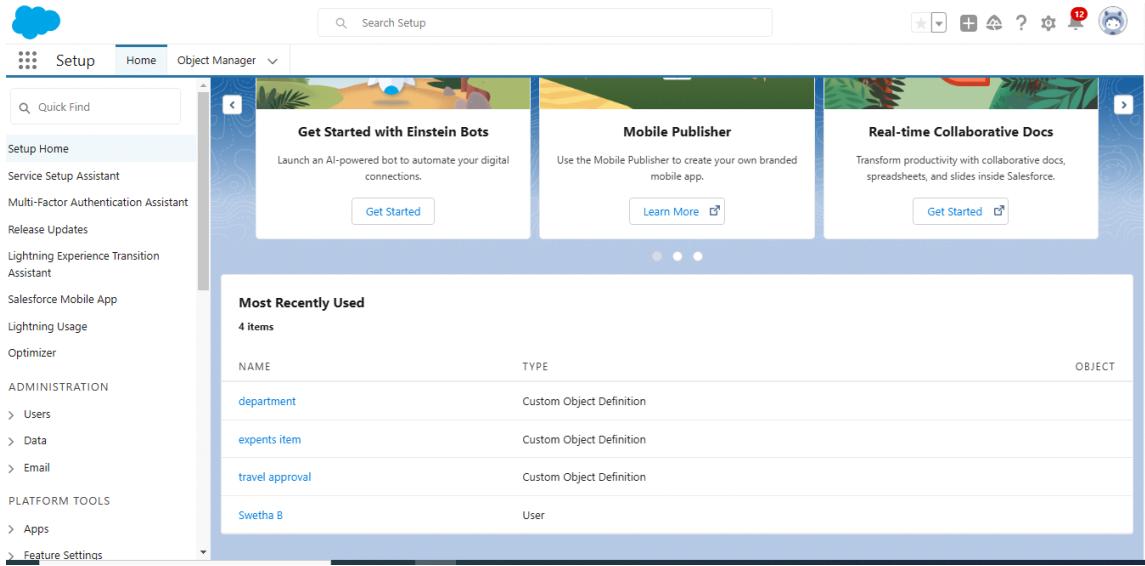
1. Go to [developers.salesforce.com/](https://developer.salesforce.com/)
2. Click on sign up.
3. On the sign-up form, enter the following details:
  1. First name & Last name
  2. Email
  3. Role: Developer
  4. Company: College Name
  5. County: India
  6. Postal Code: pin code
  7. Username: should be a combination of your name and company This need not be an actual email id, you can give anything in the format: [username@organization.com](mailto:username@organization.com)

#### Milestone 2 Creating the Application :

*Create the Travel Application*

**Search AppManager in quick find box, click on new lightning app. Before**

**creating the application download this zip file and extract it.<https://developer.salesforce.com/files/TravelAppWorkshopFiles.zip>**



### Milestone 3 -What is an object?:

#### **Custom Object Creation**

**1.After you Login to your org, click create on the right side of the page and select custom object. .**

**To create an object: From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.**

**On Custom object defining page: Enter the label name, plural label name, click on Allow reports, Allow search → Save.**

#### **Activity-2:**

**Create 3 custom objects and tabs      a) Department      b) Travel Approval      c) Expense Item**

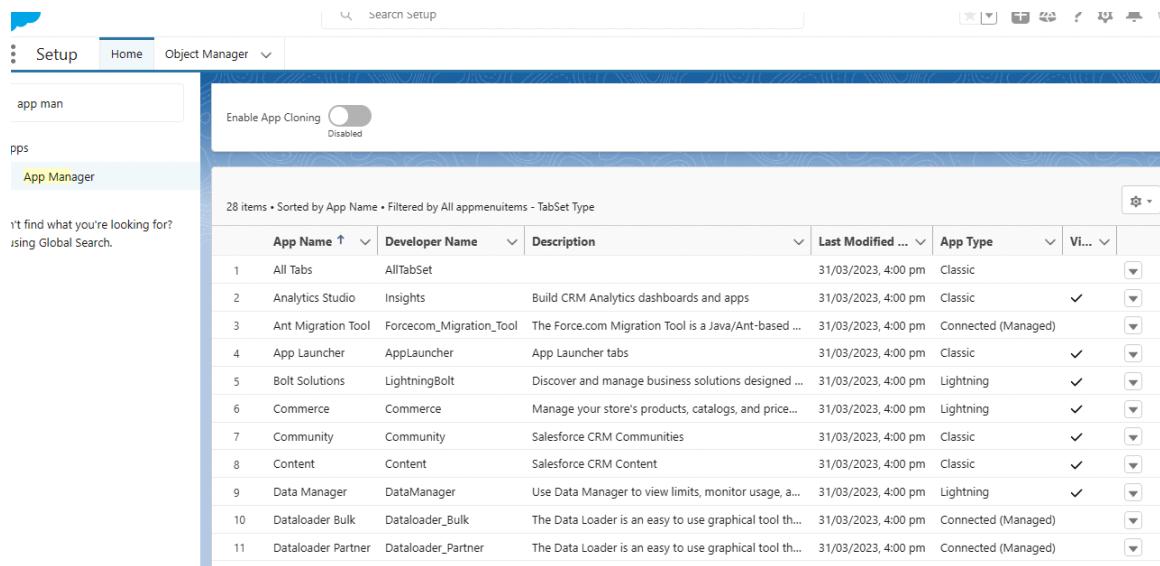
**Create Department Object 1.From Setup, click Object Manager. 2.Click Create, then select Custom Object. 3.Give the name as Department**

**To Navigate to Setup page: Click on gear icon → click setup.**

**To create an object: From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.**

**On Custom object defining page: Enter the label name, plural label name, click on Allow reports, Allow search → Save.**

**4. Now the tabs section opens, add this tab to the travel app.**



The screenshot shows the Salesforce Setup interface with the 'App Manager' selected. A search bar at the top right contains the text 'Search setup'. Below it, a toggle switch labeled 'Enable App Cloning' is set to 'Disabled'. The main area displays a table titled '28 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type'. The columns are: App Name, Developer Name, Description, Last Modified, App Type, and View. The data includes various tabs like 'All Tabs', 'Analytics Studio', 'Ant Migration Tool', etc., each with its developer name, description, last modified date, app type (Classic, Lightning, Connected), and a view icon.

App Name	Developer Name	Description	Last Modified	App Type	View
1 All Tabs	AllTabSet		31/03/2023, 4:00 pm	Classic	▼
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	31/03/2023, 4:00 pm	Classic	✓ ▼
3 Ant Migration Tool	Forcecom_Migration_Tool	The Force.com Migration Tool is a Java/Ant-based ...	31/03/2023, 4:00 pm	Connected (Managed)	▼
4 App Launcher	AppLauncher	App Launcher tabs	31/03/2023, 4:00 pm	Classic	✓ ▼
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed ...	31/03/2023, 4:00 pm	Lightning	✓ ▼
6 Commerce	Commerce	Manage your store's products, catalogs, and price...	31/03/2023, 4:00 pm	Lightning	✓ ▼
7 Community	Community	Salesforce CRM Communities	31/03/2023, 4:00 pm	Classic	✓ ▼
8 Content	Content	Salesforce CRM Content	31/03/2023, 4:00 pm	Classic	✓ ▼
9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, a...	31/03/2023, 4:00 pm	Lightning	✓ ▼
10 Dataloader Bulk	Dataloader_Bulk	The Data Loader is an easy to use graphical tool th...	31/03/2023, 4:00 pm	Connected (Managed)	▼
11 Dataloader Partner	Dataloader_Partner	The Data Loader is an easy to use graphical tool th...	31/03/2023, 4:00 pm	Connected (Managed)	▼

## Milestone 4 - What is a Tab?

**Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.**

- 1. For Object, select Event.**
- 2. For Tab Style, select any icon.**
- 3. Leave all defaults as is. Click Next, Next, and Save .**

## Milestone 4 Create- Fields& Relationships :

1. Click Fields & Relationships, and click New.
  2. For data type, select Currency. Enter these details. a. For Field Label, enter Amount. b. For Length, enter 16. c. For Decimal places, enter 2. d. Select Required.
- 

4. Click Next, Next, then Save & New.

Activit-2:

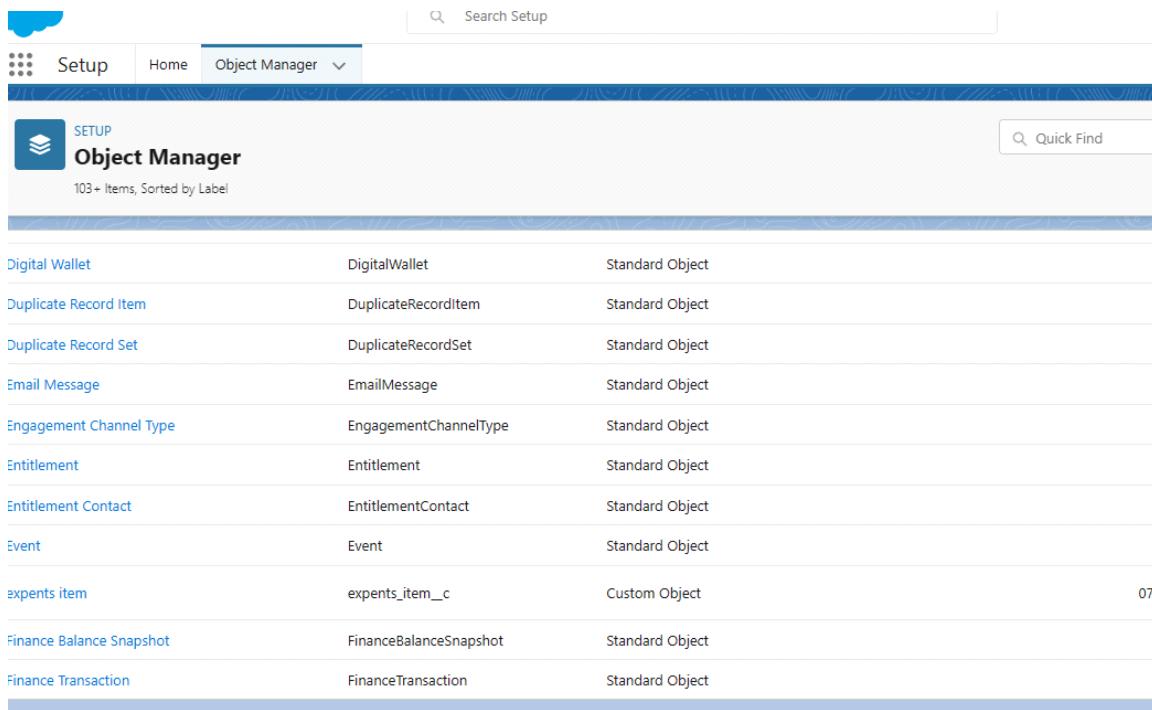
Create the Expense Type field.

- Select Picklist as the data type.
- Enter values, with each value separated by a new line.
- Add these values:(Airfare, Hotel, RentalCars, Meals, Others)
- Select Required.
- Click Next, Next, then Save & New.

Activit-3:

Create the Travel Approval field.

- Select Master-Detail Relationship data type, click Next.
- Select Travel Approval from the Related To menu.
- Click Next four times, then click Save.



The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for Setup, Home, and Object Manager. A search bar at the top right says "Search Setup". Below the tabs, it says "SETUP Object Manager" and "103+ Items, Sorted by Label". There is also a "Quick Find" search bar. The main area displays a table of objects:

Digital Wallet	DigitalWallet	Standard Object
Duplicate Record Item	DuplicateRecordItem	Standard Object
Duplicate Record Set	DuplicateRecordSet	Standard Object
Email Message	EmailMessage	Standard Object
Engagement Channel Type	EngagementChannelType	Standard Object
Entitlement	Entitlement	Standard Object
Entitlement Contact	EntitlementContact	Standard Object
Event	Event	Standard Object
expents item	expents_item__c	Custom Object
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object
Finance Transaction	FinanceTransaction	Standard Object

## Milestone 5 -Import Departments

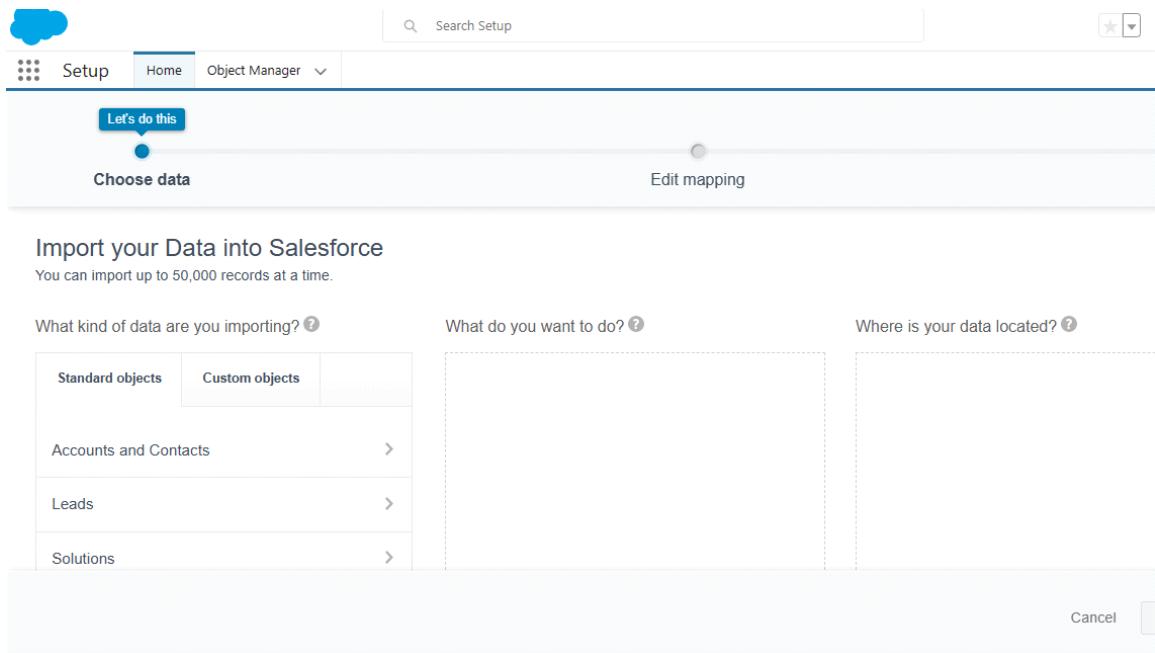
### Activity-1:

**From Setup, click the Home tab.**

1. In the Quick Find box, enter Data Import and select Data Import Wizard.
2. Click Launch Wizard!

**Click the Custom Objects tab and select the Departments object.**

3. Next, select Add new records.
4. Drag and drop the Departments.csv file you downloaded using zip file or click the CSV icon and browse to select your file. Select Next.
5. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.
6. The next screen gives you a summary of your data import. Click Start Import . 7. Click OK on the popup.
8. This takes you to the bulk import summary window that shows that the process has completed and 16 records have been successfully imported or processed. You'll also get an email notification confirming the import.



## Milestone 6-Customize User Interface

### **Activity-1: Create User and Setup Approvals**

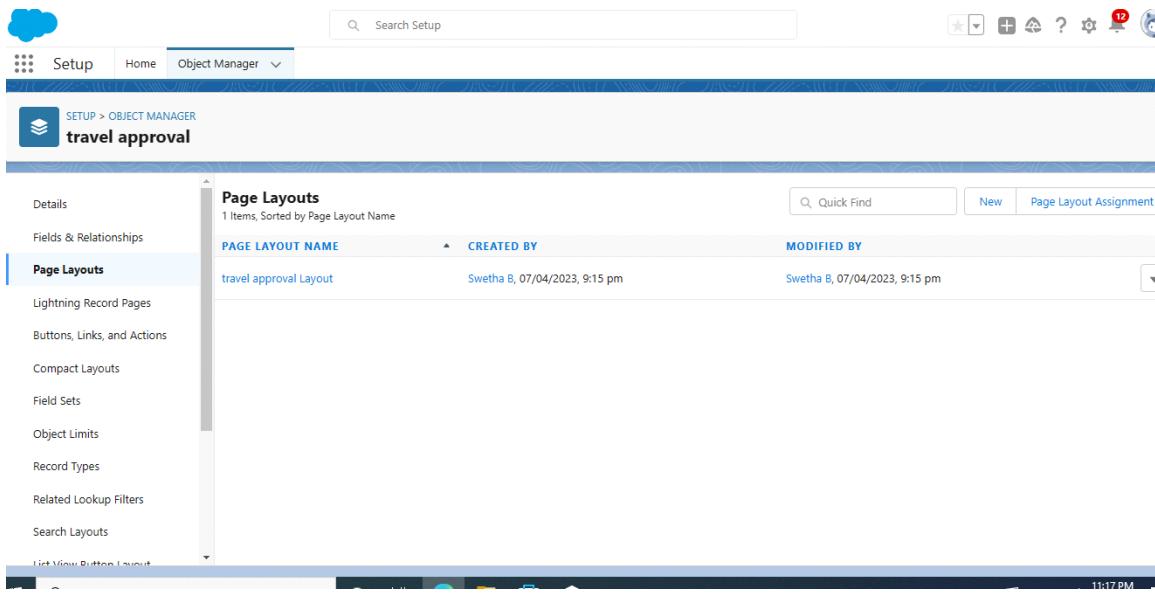
- 1.Enter users in the quickfind box and select users.**
- 2.Click new user .**
- 3.Now give the name as you wish but the email must be real email address.**
- 4.For username field follow the insstructions**
  - Firstname.<yourlastname>@<yourcompany>.com • ...or create a username of your choice that should be unique
- 5.Give the role as CEO, Profile as System Administrator and license as Salesforce. 6.From Setup, enter Users in the Quick Find box and select Users.**
- 7.Select your user account in the list provided. (Click on your name in the All Users list.)**
- 8.Click Edit.**
- 9.Scroll down to Approver Settings. Set your manager as the user you have created recently.**
- 10.Click Save**

## Milestone 7 - Use customization

### Activity -1: Customize Travel Approval Object Page layout

1. From the Object Manager, search for the travel approval object and click on page layouts and click edit.
2. Drag Section from the top pane to the lower pane directly below the Information section. When dragging over the page, you get a visual indicator of where you can drop the new section.
3. Name the section Trip Info, leave the rest of the settings at their default values, then click OK.
4. Drag the Purpose of Trip field from the Information section to the Trip Info section..
5. Drag Trip Start Date and Trip End Date from the top pane into the left-hand column of the Trip Info section.
6. Drag Out-of-State and Destination State from the top pane into the right-hand column of the Trip Info section.
7. Drag the Department field from the left-hand column of the Trip Info section to the right-hand column.
8. Click Save

**Note:** You may need to refresh your browser screen for the changes to show up.



## Milestone 8 -Add Business Logic to Travel App

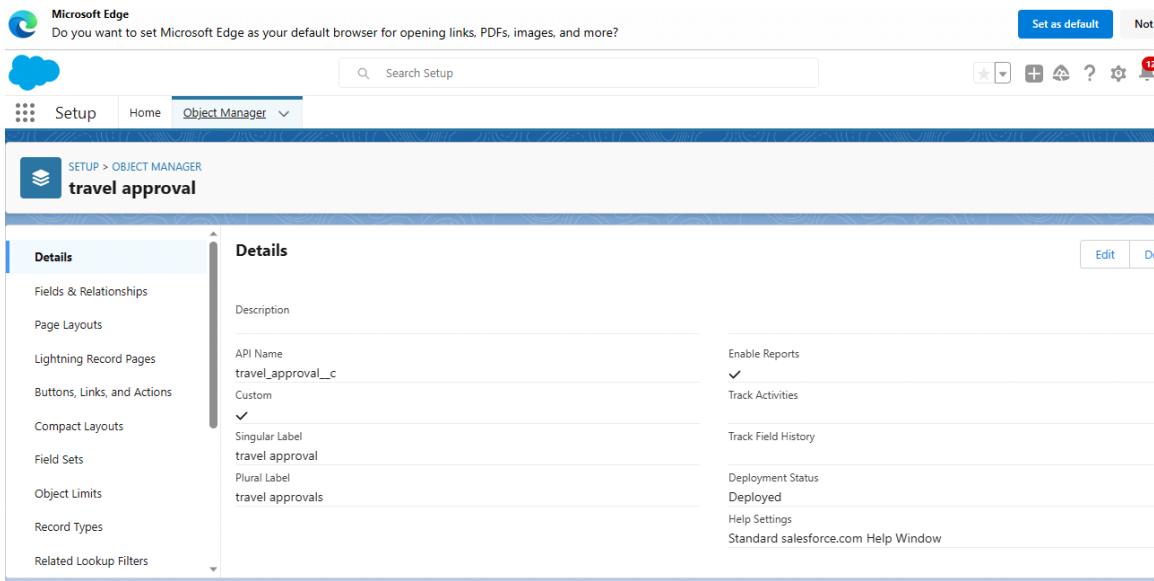
### Activity-1: Create Validation Rule

1. Search for the travel approval object from the object manager and open the object.
2. Click on validation rules and give your rule a name and make sure that the rule is set to active.
3. In the error condition formula enter `Trip_End_Date__c < Trip_Start_Date__c`. 4. For error location select field and pick trip end date as the location for error.

### Activity-2: Create RollUp Summary Fields

1. From the Travel Approval object, select Fields & Relationships.
2. Click New.
3. Select the Roll-Up Summary data type.
4. Click Next.
5. Enter the following values for the field details o Field Label: Total Expenses o Field Name: Total\_Expenses (this automatically gets set when you tab out of the Field Label field)
6. Click Next.
7. Configure the roll-up calculation. o Summarized Object: Expense Items o Roll-Up Type: SUM o Field to Aggregate: Amount o Filter Criteria: All records should be included in the calculation

## 8. Click Next, Next, Save



## Milestone 10-What are Reports?

There are 4 types of report formats in Salesforce

1.tabular report

2.summary report

3.matrix report

4.joined report

Activity

Add Report To create a report: Go to the app → click on the reports tab

Click New Report

Select report type from category or from report type panel or from search panel → click on start report.

Customize your report, then save or run it.

**Report Types**

**Custom Report Types**

Custom report types allow you to build a framework in the report wizard, from which users can create and customize reports. You build custom report types off of the relationships (master-detail and lookup) between objects so that you can:

- Choose which objects to display to users creating and customizing reports
- Define the relationships between objects displayed to users creating and customizing reports
- Select which objects' fields can be used as columns in reports

**Note**: Note that the visibility of custom report types in the report wizard is controlled by users' access to the objects in the report type.

Don't show me this page again

Continue

## Milestone 11 - Dashboards:

### Activity: Create Travel Approvals Dashboard

1. Click on Dashboards tab from the travel approval application, click on new dashboard
2. Give your dashboard a name and click on +component , select the report which you created .
3. For the data visualization select any of the chart, table etc as your wish.

**Reports and Dashboards Settings**

**Report and Dashboard User Interface Settings**

Modify the behavior of the user interface for report and dashboard pages using the following settings:

**User Interface**

- Enable Floating Report Headers (Salesforce Classic only)
- Enable Dashboard Finder i
- Hides the option to export a report in XLS format in Lightning Experience
- Enable Inline Editing in Reports (Lightning Experience Only)

**Confidential Information Disclaimer Settings**

Specify whether or not to exclude a disclaimer that says "Confidential Information - Do Not Distribute" from report footers.

- Exclude Disclaimer from Formatted Report Exports in Lightning Experience
- Exclude Disclaimer from Report Run Pages and from Printable View Pages (Salesforce Classic Only)

**Chatter Options**

- Enable Dashboard Component Snapshots i

## 4 . TRAILHEAD PROFILE PUBLIC URL

**TEAM LEAD - <https://trailblazer.me/id/hgahlot3>**

**Team Member 1 - <https://trailblazer.me/id/s0710>**

**Team Member 2 - <https://trailblazer.me/id/niveditha2002>**

**Team Member 3 - <https://trailblazer.me/id/jguna14>**

**Team Member 4 - <https://trailblazer.me/id/swetha178>**

**Team Member 5 - <https://trailblazer.me/id/devij10>**

## **5 . ADVANTAGES & DISADVANTAGES**

- **Advantages**

1. You can experience new cultures
2. You will expand your knowledge
3. You will be forced out of your comfort zone
4. Boost is confidence
5. Memories for a life time

- **Disadvantages**

1. Traveling can be costly
2. Communication problems
3. Home sickness
4. You might get the travel bug
5. You might get stuck

## **6 . APPLICATIONS**

1. Self-booking tool

- 2.Dashboards that provide vital information at one glance**
- 3.Notification for lower fare availability**
- 4.Email alerts for approvals**
- 5.Easy-to-use interface**
- 6.One-click statements**
- 7.Multiple language support**
- 8.Policy compliance and non-compliance triggers**
- 9.Reports of missed savings due to delay in approval**

## **7 . CONCLUSION**

In conclusion ,we can say that travel is a very productive activity both for the travel and the government. As they support each other simultaneously. Also, the government should consider improving the conditions of the country as more and more number of travel visit their country.

## **8 . FUTURE SCOPE**

- a. The travel approval industry is extremely diverse - from the size of organization ; business;sector;organization;and process,it can be taken as the collection of varies industry.
- b. Travel approval is a diverse range of products than a single product.
- c. Travel approval industries is becoming futuristic by inculcating new travel trends in its ecosystem making it more feasible for the public.Every other things is done through online mediums,people prefer using contactless methods.

