

APPLICATION FOR CORPORATES

1. Introduction:

1.1 Overview:

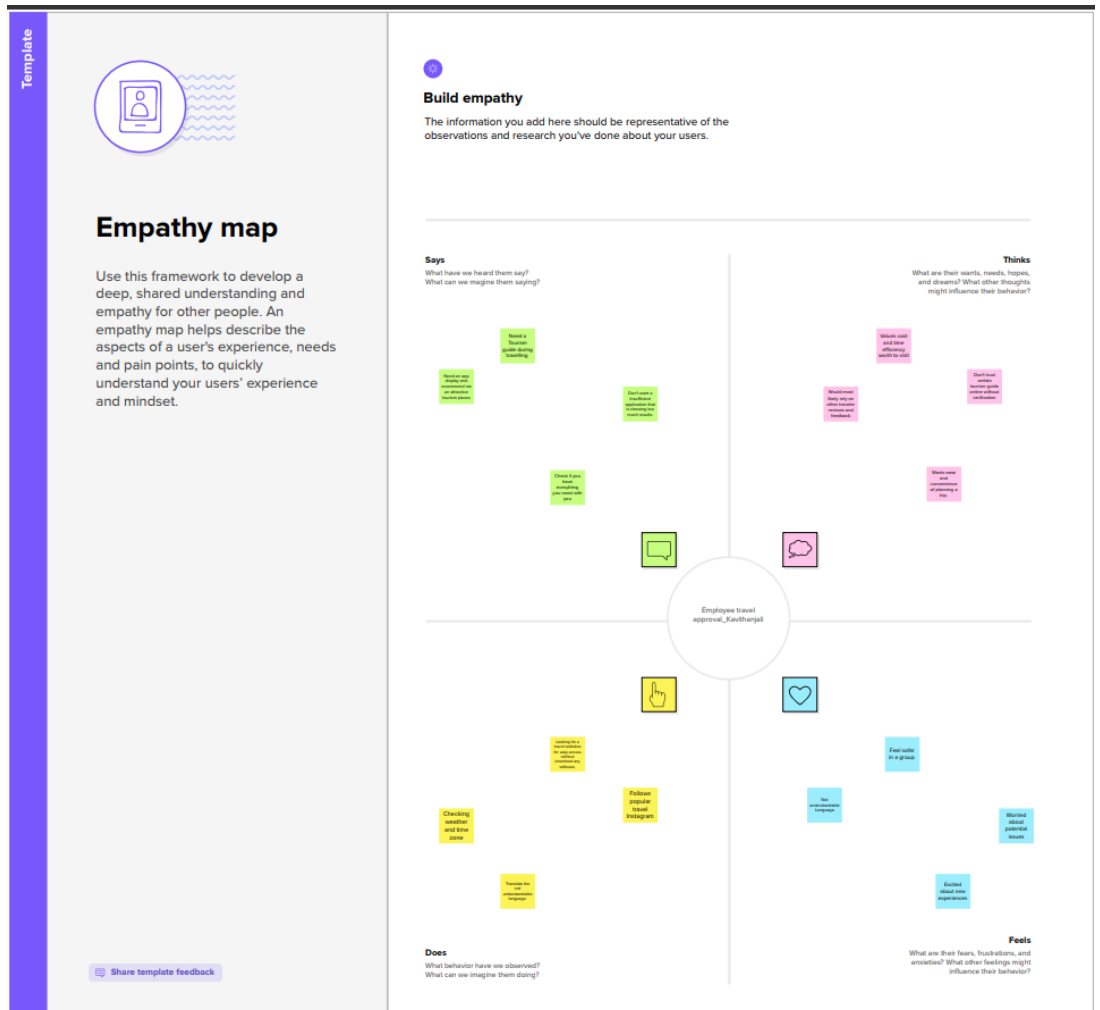
This project will help the professionals who are in cross-technology and wanted to switch to salesforce with the help of this project. They will gain knowledge and adds up into their resume as well.

1.2 Purpose:

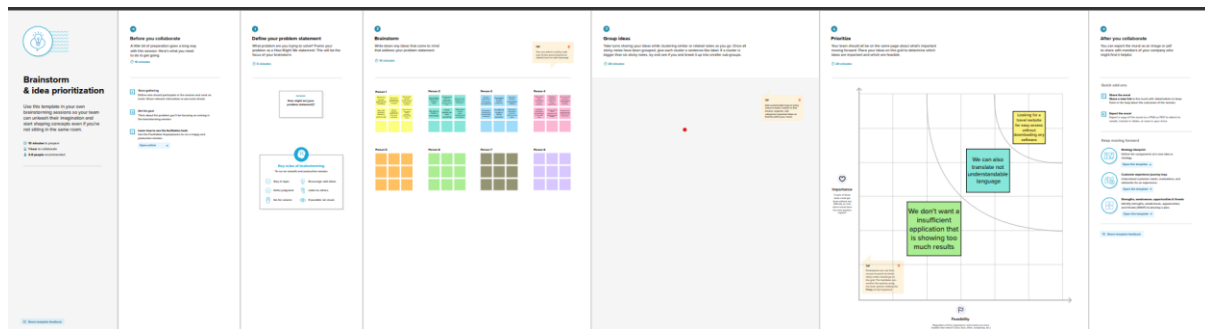
This project helps in sending your travel approval requests to your manager in place of emails.

2. Problem Definition and Design thinking:

2.1 Empathy Map:



2.2 Ideation and Brainstorming Map:

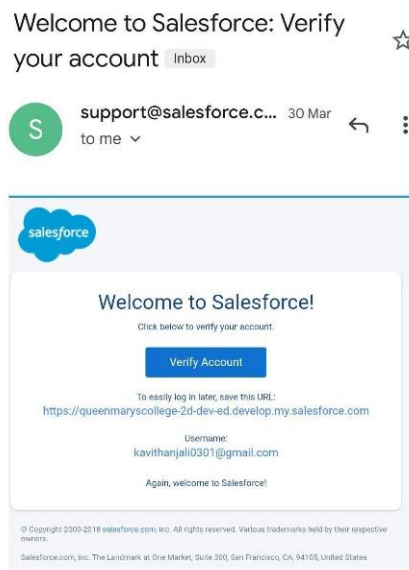


3. Result:

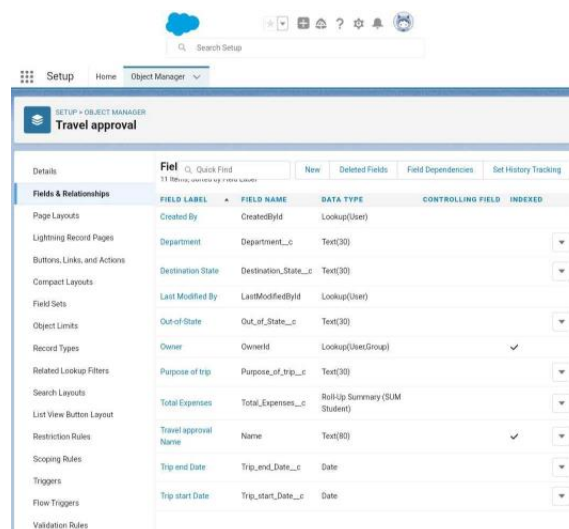
3.1 DATA Model:

Object Name	Fields in the Object						
Department	<table> <tr> <th>Field Label</th><th>Data type</th></tr> <tr> <td>Roll-up Summary</td><td>Roll-up Summary</td></tr> <tr> <td>Formula</td><td>Formula</td></tr> </table>	Field Label	Data type	Roll-up Summary	Roll-up Summary	Formula	Formula
Field Label	Data type						
Roll-up Summary	Roll-up Summary						
Formula	Formula						
Travel Approval	<table> <tr> <th>Field Label</th><th>Data type</th></tr> <tr> <td>Travel Approval</td><td>Master Detail Relationship</td></tr> </table>	Field Label	Data type	Travel Approval	Master Detail Relationship		
Field Label	Data type						
Travel Approval	Master Detail Relationship						
Expense Item	<table> <tr> <th>Field Label</th><th>Data type</th></tr> <tr> <td>Expense Type</td><td>Picklists</td></tr> </table>	Field Label	Data type	Expense Type	Picklists		
Field Label	Data type						
Expense Type	Picklists						

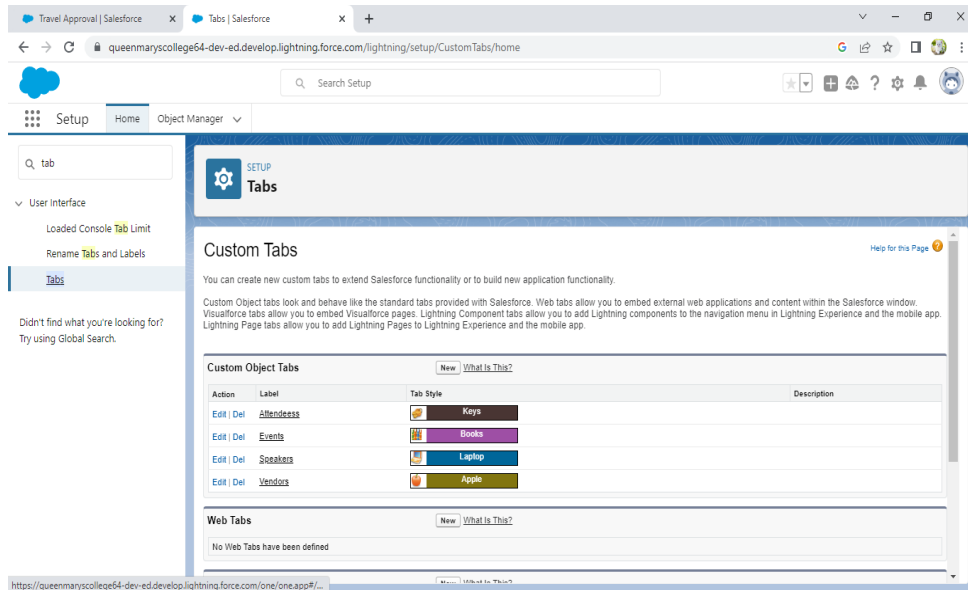
3.2 Activity & Screenshot:



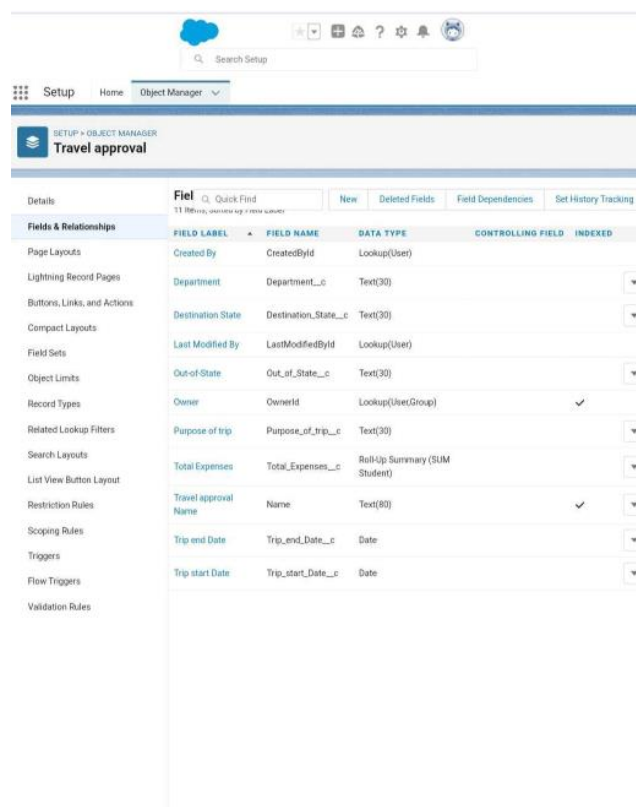
- First go the Salesforce.com and then click Login> Salesforce> Enter Username and Password.
- After Logging in you will see the home page.



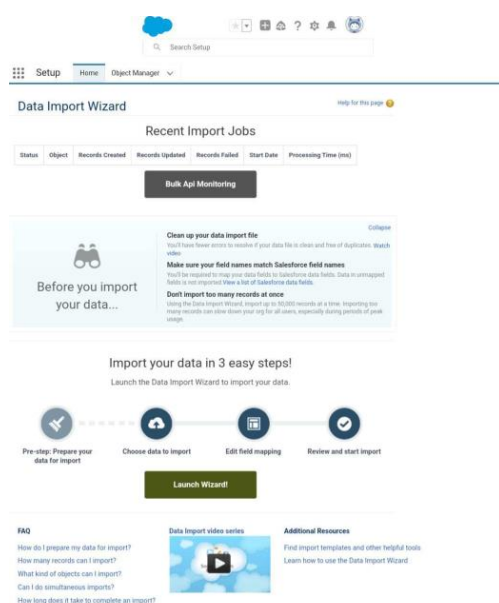
- In this travel approval application, we will be creating three objects, they are Department, Travel Approval, Expense item.



- There are four types of tabs, they are standard object, custom object, web, visual force tab.
- Now create a custom tab. Click home tabs and enter tabs in quick find. Under custom object tabs click new.
- For object, select event. For tab style, select any icon as your wish.
- Leave default as is. Click next and save.



- In this activity we must create field and relationship. There are two types of fields. They are standard fields and custom fields.
- Now click fields and relationship and click new.
- For datatype select currency.
- Enter these details.
 - i. For field label – Enter amount.
 - ii. For length – Enter 16
 - iii. For Decimal places – Enter 2
 - iv. Select required. Click next and save.
- Now we can create the Expense type field.
- Select picklist as the datatype.
- Select enter values. Select required. Click Next and Save.
- Then we can create the travel approval field. In these select master detail relationship as a data type click next and save.



Salesforce import of
"Departments.csv" has finished. ☆
16 rows were processed. [Inbox](#)

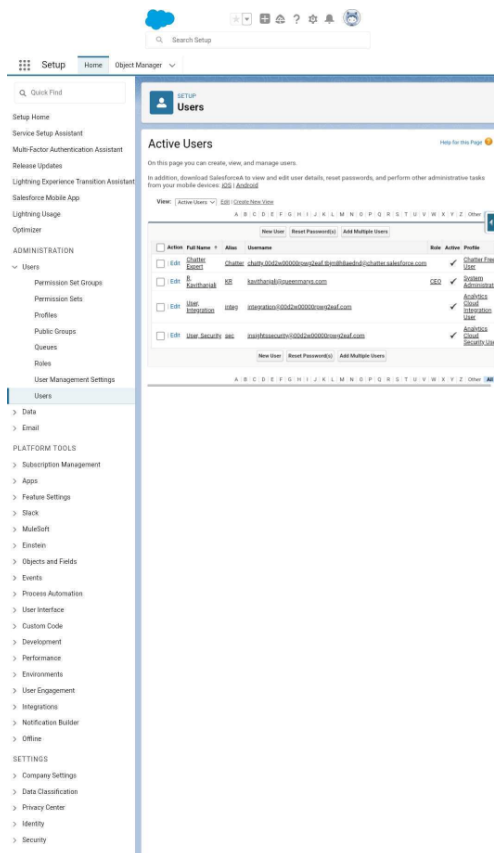
 noreply@salesforce.co... 31 Mar
to me ▾

Your Departments import is complete. Here are your results:

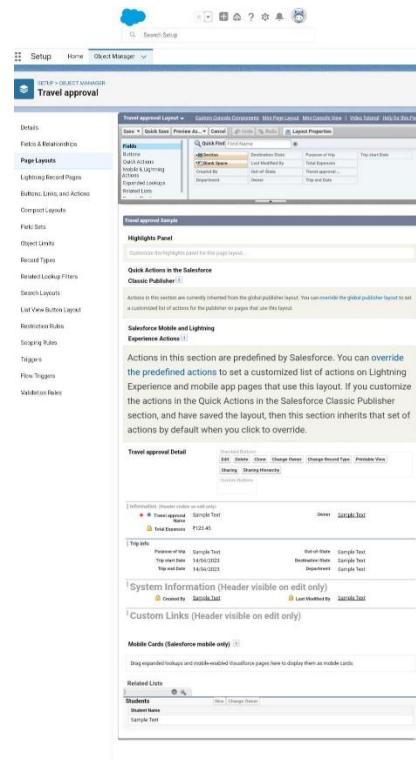
Departments Created: 16
Departments Updated: 0
Departments Ignored: 0 (We ignored updates that we couldn't match to an existing record.)
Departments Failed: 0 (We couldn't import these due to errors.)
Departments Rejected: 0 (We rejected duplicate rows.)
Processed job information for imported Departments:
<https://queenmarycollege-2d-develop.my.salesforce.com/7502w00000PMfIEAA1?fromEmail=1>

- In order to complete this activity, you need to download the reference file.
- In quick find box, enter data import. And select data import wizard. Click Launch wizard.
- Click the custom object tab and select the department object. Next drag and drop the Departments.csv file. You downloaded using the zip file.
- Select next. The next screen gives you a summary of your data import. Click start import. And click ok on the pop-up.

- This takes you a bulk import summary. That shows that process has complete. And 16 records have been successfully imported or processed.
- You get a mail confirming the import.



- In this milestone, we are going to setup the user, customizing the page layout.
- Now create USER and setup approvals.
- Enter users in the quick find box and select users. Click new users.
- Now give the name as you wish. Now give the role as CEO, profile as system administrator and license as salesforce.
- From setup enter user in the quick find box and select user.
- Select your user account in the list provided. Click edit, scroll down to approver settings. Set your manager as the user you have created recently and click save.



- In this activity, we should customize travel approval object page layout.
- From the object Manager, search for the travel approval object and click on page layout and click edit.
- Now we should create,
 - I. Section trip info,
 - II. Purpose of trip field,
 - III. Trip start date,
 - IV. Trip end date,
 - V. out of state,
 - VI. Destination state and
 - VII. Department. and paste all these in the trip info section below the information section and then click save.

Travel approval Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Rule Name: [Quick Tip](#)

Active: ☒ [Go to Advanced Functions](#)

Error Condition Formula

Example: `Account__Person__c < 100` [Add Relationship](#)
 Displays an error if Account is more than 100.
 If this formula expression is true, display the text defined in the Error Message area.

Formula: `Trip__roll_Summary__c < Trip__start_Date__c`

[Add Relationship](#)
[Add Function](#)
[Add Field](#)

Error Message

Example: `Account__Person__c < 100` [Add Relationship](#)
 This message will appear when Error Condition formula is true.

Error Message:

This error message will either appear at the top of this page or below a specific field on the page.

Error Location: ☐ Top of Page ☒ Next Trip and Date ☐ [Add Field](#)

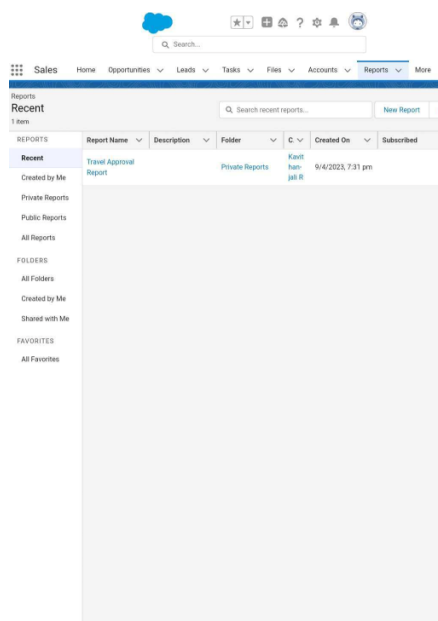
[Save](#) [Done & Next](#) [Cancel](#)

- In this activity, we should create Validation rule, Roll-up Summary, Formula fields.
- In the Roll-up summary field enter the following values for the field details
- Field Name: Total_Expenses (This is automatically generated)
- Field Label: Total Expenses
- Select the Roll-up summary datatype and click next.
- Configure the Roll-up Calculation:
 - a. Summarized Object: Expense Items
 - b. Roll-up Type: SUM
 - c. Field to aggregate: Amount
 - d. Filter Criteria: All records should be included in the calculation.
- Click Next, Next and Save.
- First, we need to upload a zip file to your Salesforce environment that contains all the images we use. You should have a file titled StatusImages.zip.
- Click the Home tab to navigate back to the main setup page.
- Click Custom Code Static Resources (or enter Static in the Quick Find to filter down the options).
- Click New. Enter the following values for your static resource.
- Now select the travel approval object. Select Fields & Relationships. Click New.
- Select Formula data type. Click Next.
- Enter the following values:
- Field Label: Status Indicator

- Field Name: Status_Indicator (This automatically gets sent when you tab out of the Field Label field)
- Formula Return Type: Text
- Click Next.
- Copy and paste the following formula into the formula editor.

```
IF( ISPICKVAL( Status__c , 'Approved'), IMAGE("/resource/StatusImages/thumbs-up.png",
"Accepted", 20, 20), IF ( ISPICKVAL( Status__c , 'Rejected'),
IMAGE("/resource/StatusImages/thumbs-down.png", "Rejected", 20,
20),IMAGE("/resource/StatusImages/draft.png", "In-Process", 20, 20)))
```

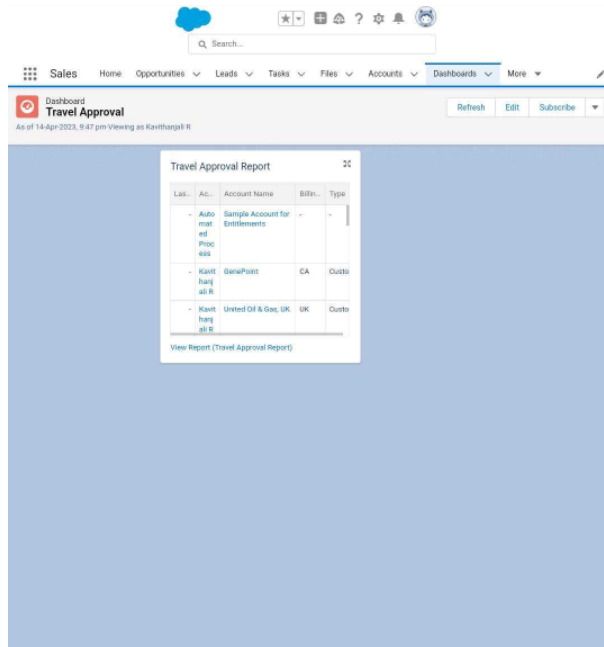
- Click Next, Next, Save.



Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified
1	Automated Process	Sample Account for Endorsements	-	-	-	21/01
2	Kaitharaj R	GenePoint	CA	Customer - Channel	Cold	21/01
3	Kaitharaj R	United Oil & Gas, UK	UK	Customer - Direct	-	21/01
4	Kaitharaj R	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	21/01
5	Kaitharaj R	Edge Communications	TX	Customer - Direct	Hot	21/01
6	Kaitharaj R	Burlington Textiles Corp of America	MD	Customer - Direct	Warm	21/01
7	Kaitharaj R	Pysanai Construction Inc.	-	Customer - Channel	-	21/01
8	Kaitharaj R	Dishman plc	IN	Customer - Channel	-	21/01
9	Kaitharaj R	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	21/01
10	Kaitharaj R	Expedia Logistics and Transport	OR	Customer - Channel	Cold	21/01
11	Kaitharaj R	University of Arizona	AZ	Customer - Direct	Warm	21/01
12	Kaitharaj R	United Oil & Gas Corp.	NY	Customer - Direct	Hot	21/01
13	Kaitharaj R	eForce	CA	-	-	21/01

- In this activity, we should create a report.
- Report format are four types:
 - a. Tabular Report
 - b. Summary Report
 - c. Matrix Report
 - d. Joined Report
- Types of Report:
 - i. Standard Report Type
 - ii. Customer Report Type
- Types of Access Level of Folder:
 - I. Viewer
 - II. Editor
 - III. Manager

- 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.



- At last, we should create travel approval dashboard.
- Click on dashboard tab from the travel approval applications click on new dashboard.
- Give a name and click on + component.
- Select the report. Then Select the chart.

4. TRAILHEAD PROFILE PUBLIC URL

TEAM LEADER: R. KAVITHANJALI (<https://trailblazer.me/id/kavir47>)

TEAM MEMBER 1: J. GAYATHRI (<https://trailblazer.me/id/gayathrij03>)

TEAM MEMBER 2: S. KAVITHA (<https://trailblazer.me/id/kavis106>)

TEAM MEMBER 3: R. KEERTHANA (<https://trailblazer.me/id/kribi6>)

5. ADVANTAGE & DISADVANTAGES:

ADVANTAGES:

- ❖ High security level.
- ❖ Achieve peace of mind.
- ❖ Get real lifetime Education.
- ❖ Improve creativity and problem-solving skills.
- ❖ Enhance effective communications.
- ❖ Changes the Person perspective.
- ❖ Connecting with nature improves the level of focus.

DISADVANTAGES:

- ❖ Unexpected costs and emergencies.
- ❖ Different food and water quality.
- ❖ Planning a trip takes a lot of efforts.
- ❖ Your travel companion may annoy you.
- ❖ Fear of the unknown.
- ❖ Things take so much longer in a new place.
- ❖ Adjusting to different customs and social norms.

6. APPLICATION:

Travel request power application will help users to quickly send a "Travel Request" through mobile using Power Apps. Level 1 Managers and Level 2 Managers can review the request and take actions from the same Power Apps through mobile.

7. CONCLUSION:

In this project, we did Empathy Map, Brainstorming and Idea Prioritization and some other activities. After completing this we gain some knowledge from the customer point of view. This helps us to know the processes and how to get approval for Travelling.

8. FUTURE SCOPE:

We expect salesforce to integrate data science and big data capabilities to its service cloud and marketing cloud.

In this field involves hospitality management, Tour management, Travel management, etc.... It has endless job opportunities in India as large number of heritage and culture.