

BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES:

1.INTRODUCTION:

1.1 OVERVIEW:

Under the scheme of Naan mudhalvan we had done a salesforce project in the field of build an employee travel approval application for corporates. In this project we had done one empathy map, brainstorming and idea prioritization and creation of an application for corporates.

1.2 PURPOSE:

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

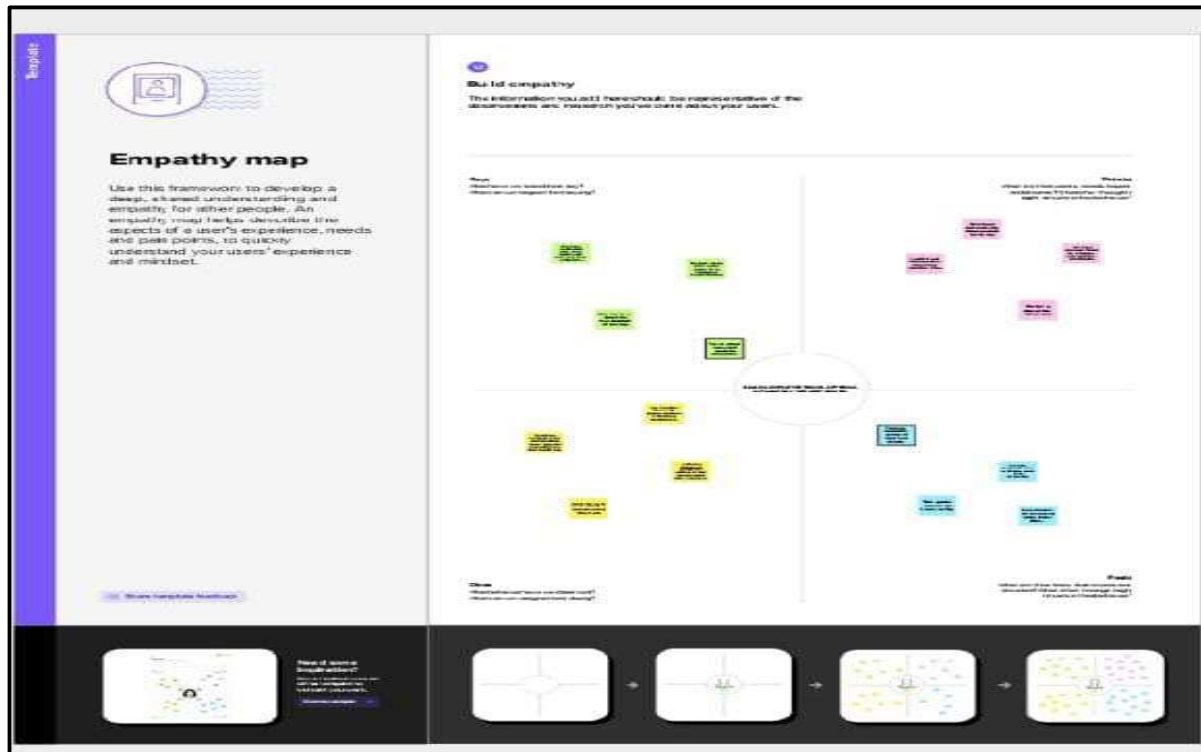
This project aims are to provide real – time knowledge for all the students who have basic knowledge of salesforce and looking for a real – time project. This will also help to those professionals who are in cross – technology and to switch to salesforce with the help of this project, we can gain knowledge and can include to their resume as well.

In this project we will learn

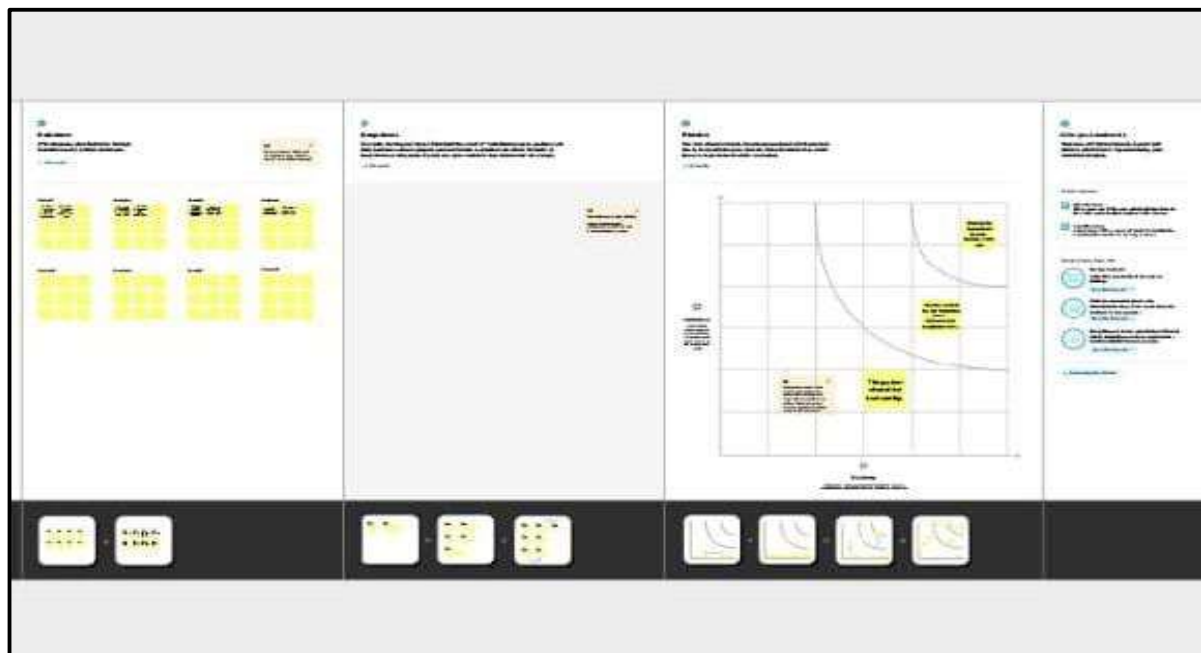
1. Real time salesforce project.
2. Object and relationship in salesforce.

2. PROBLEM DEFINITION AND DEFINE THINKING:

EMPATHY MAP:



IDEATION AND BRAINSTORMING MAP:



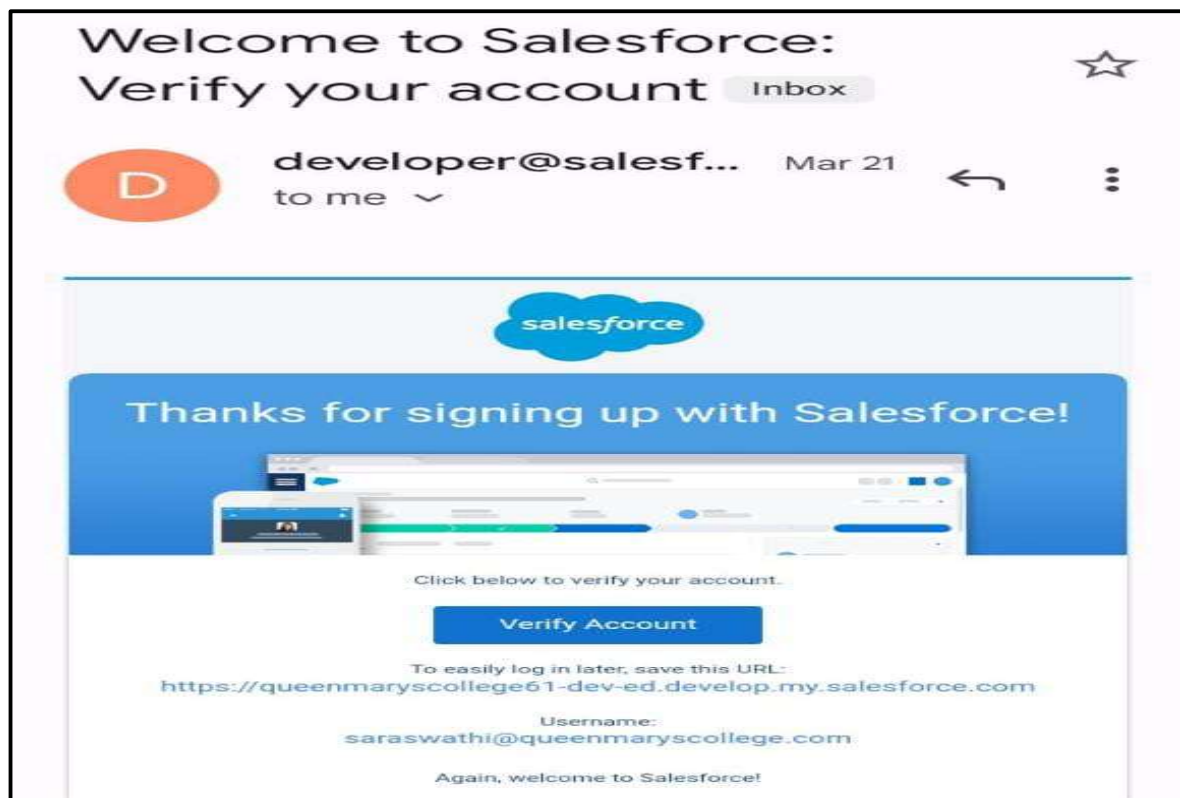
3. RESULT:

3.1.DATA MODEL:

OBJECT NAME	FIELDS IN THE OBJECT	
Department	Field label	Data type
	Roll – up summary	Roll up summary
	Formula	Formula
Travel Approval	Field Label	Data type
	Travel Approval	Master Detail Relationship
Expense Item	Field label	Data type
	Expense Type	Picklists

3.2 ACTIVITY & SCREENSHOTS:

MILESTONE 1 ACTIVITY 1:

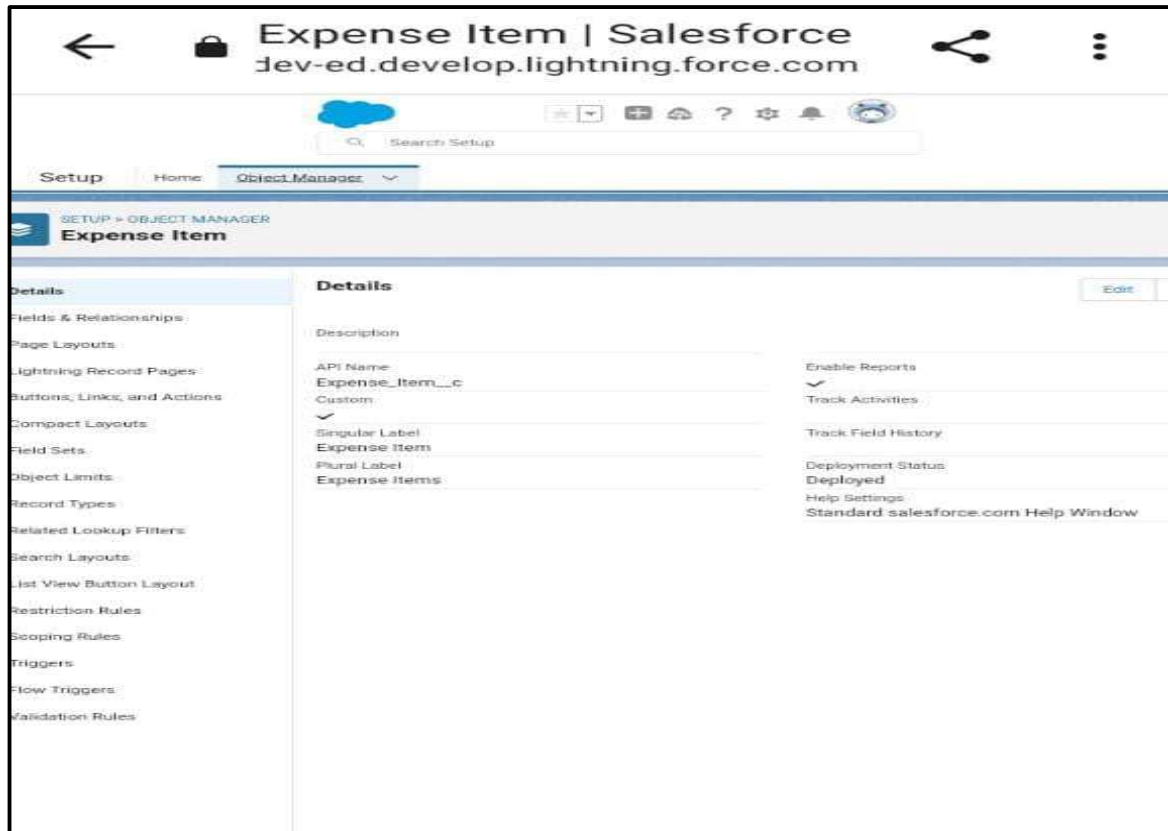


- First go the salesforce.com and then click Login>Salesforce>Enter username and password.
- After Logging in you will see the home page.

MILESTONE 1 ACTIVITY 2:

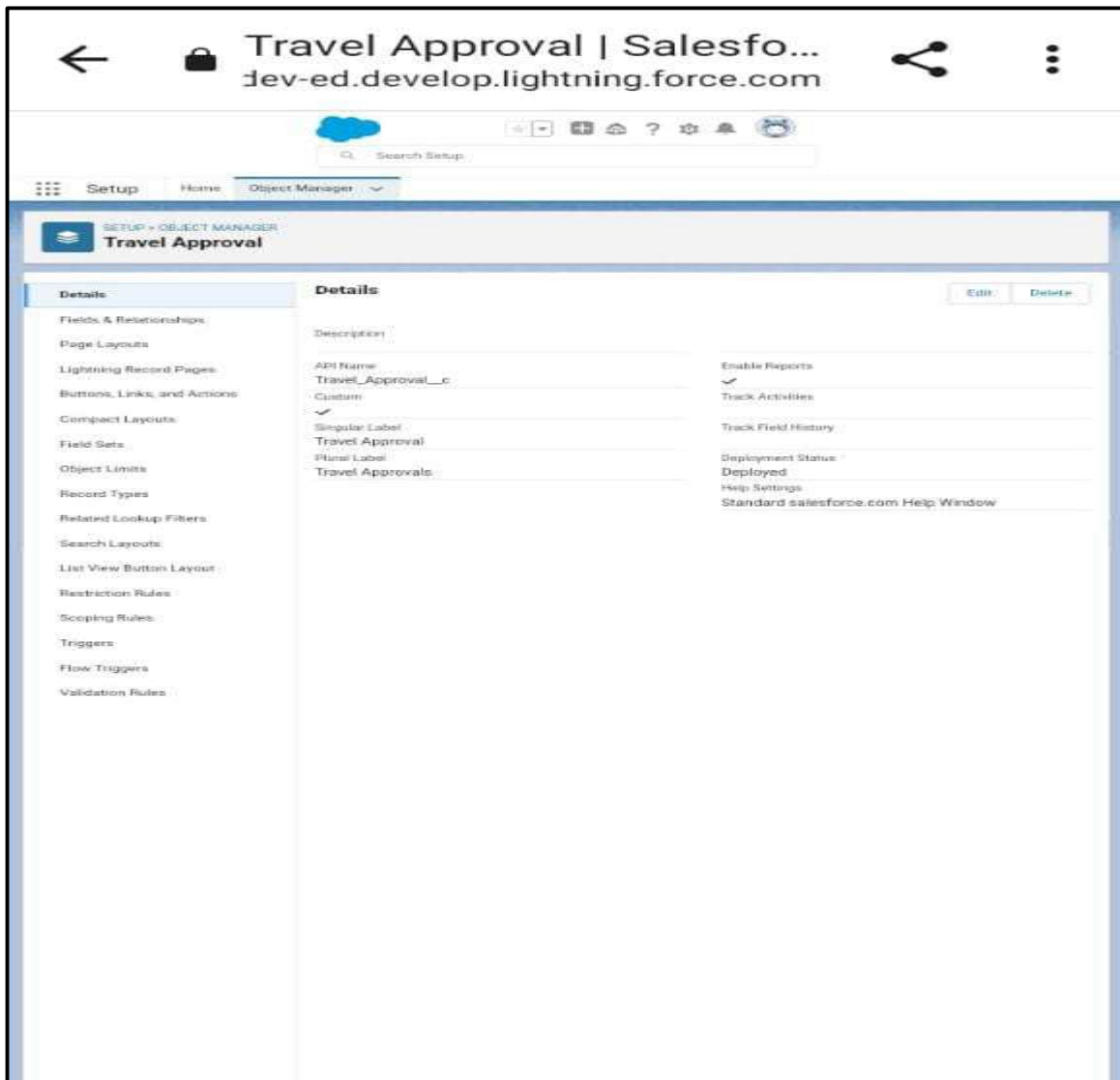


MILESTONE 3 ACTIVITY 1:

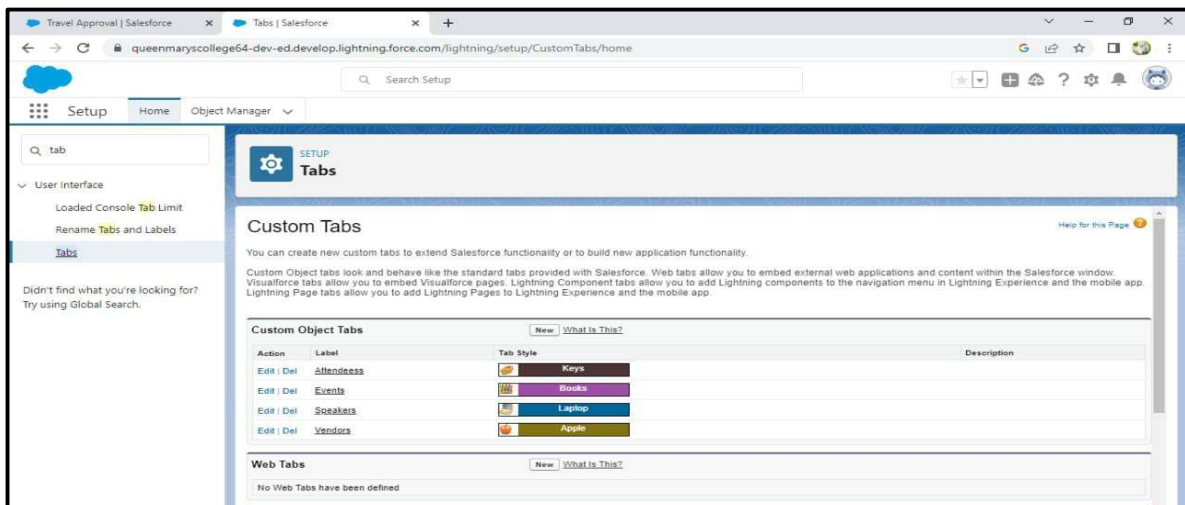


In this travel approval application, we will be creating three objects, they are department, travel approval, expense item.

MILESTONE 3 ACTIVITY 2:

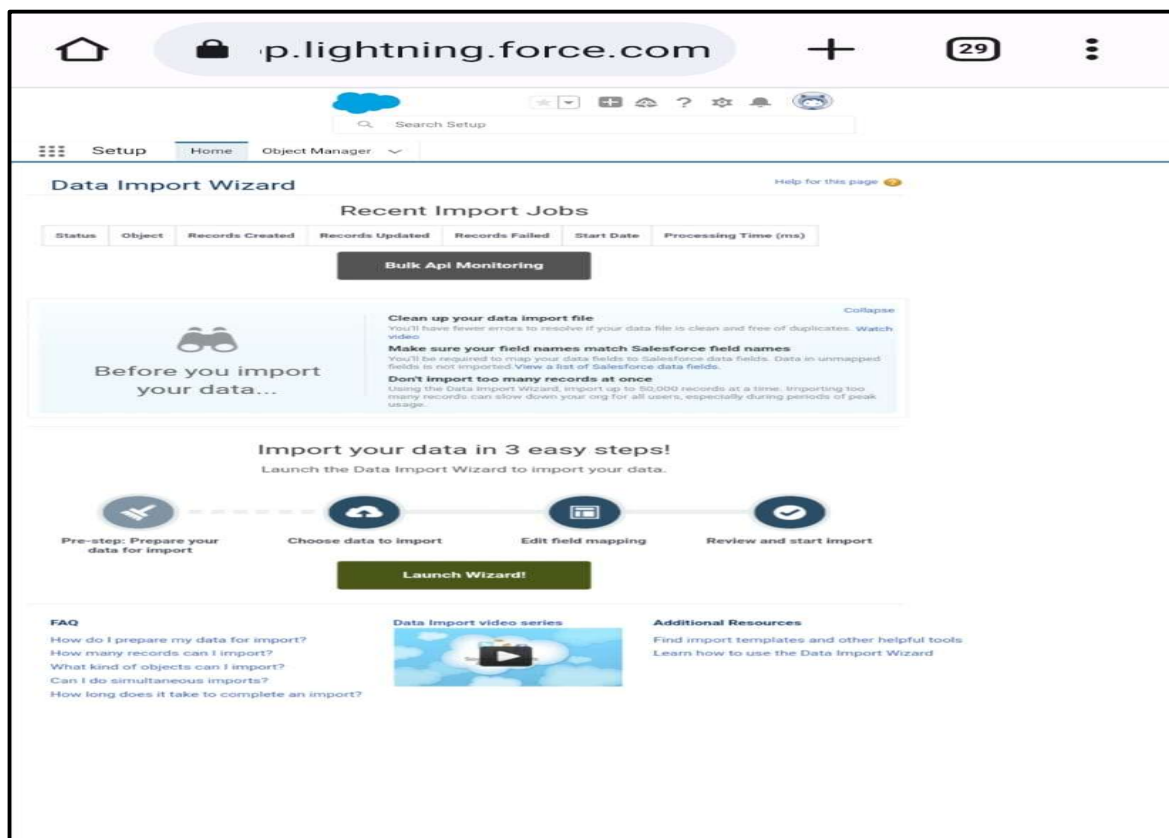


MILESTONE 4:



- 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.

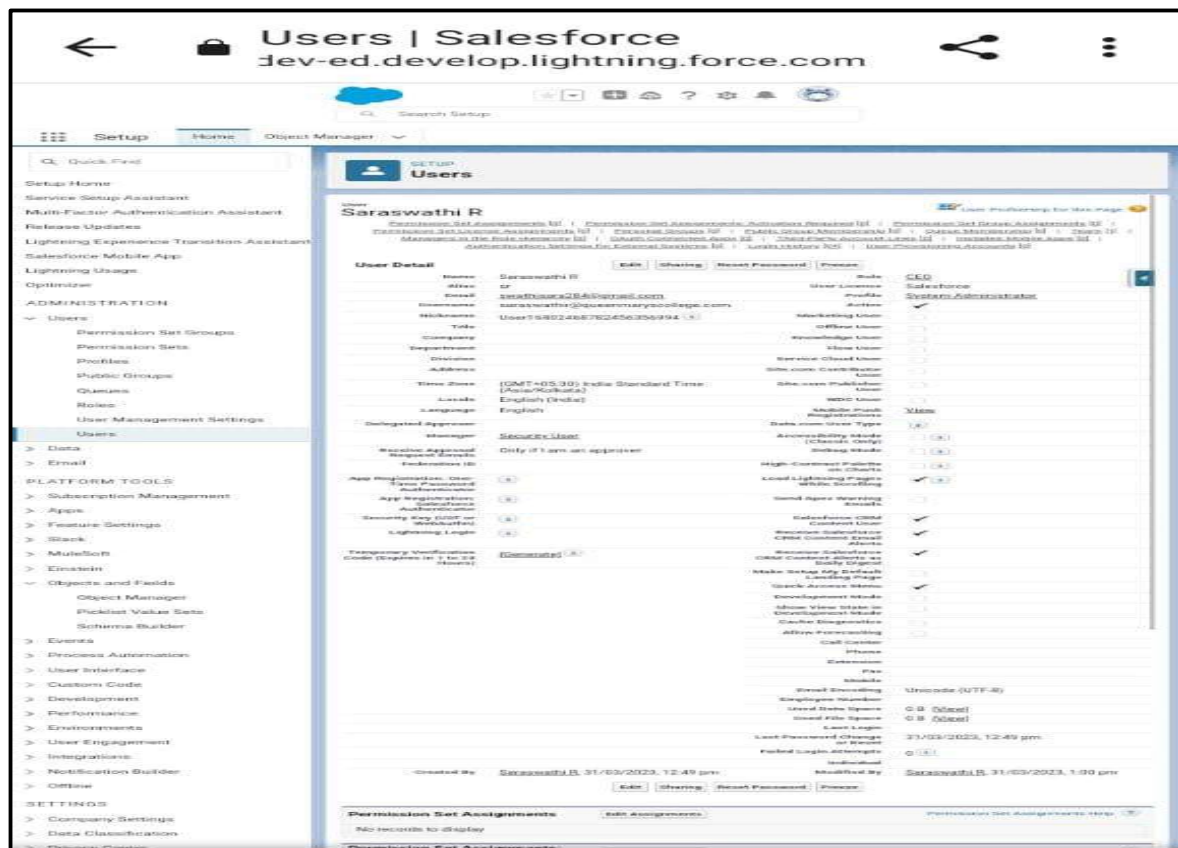
MILESTONE 5:



- 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 then 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.









MILESTONE 6:



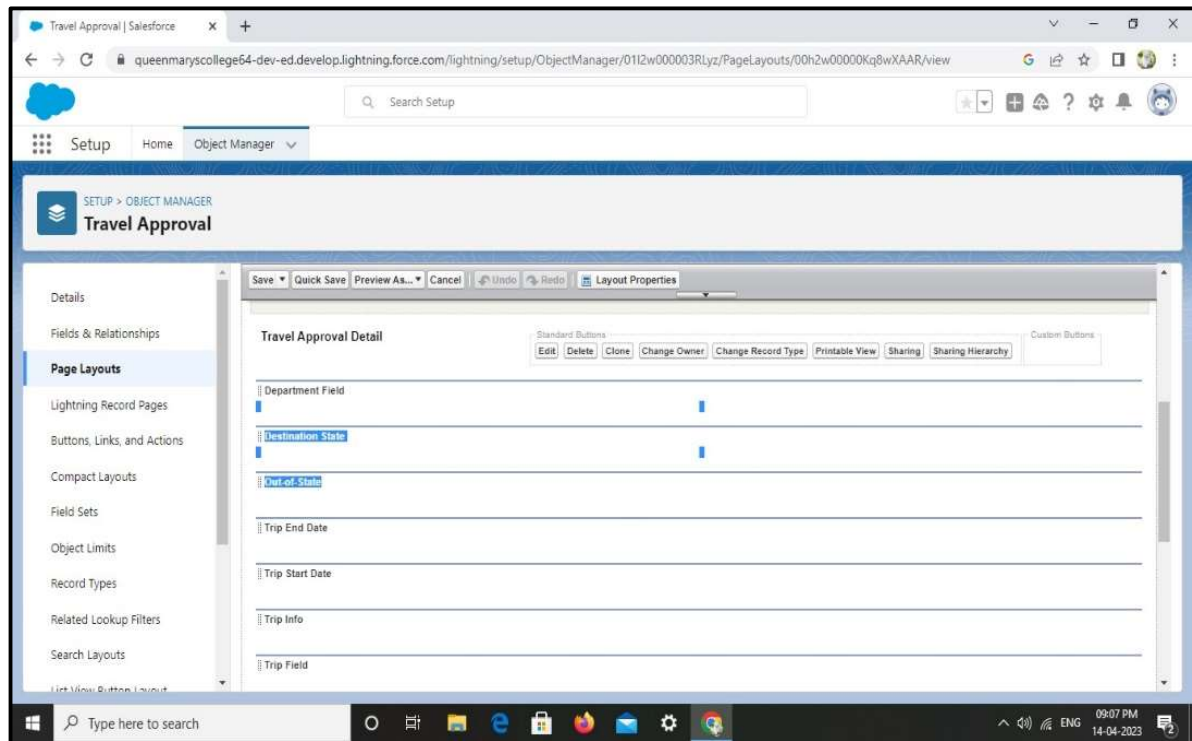
- Enter users in the quick find box and select users then click new user.
- Next give the name as you wish.
- Give the role as CEO, profile as system administrator and licenses sales force.
- From setup, enter users in the quick box and select users then edit.

- Scroll down to approval settings set your manager as user you have created recently.
- Click save.

MILESTONE 7 ACTIVITY 1:

<div>  <div>       </div> </div> <div> <input type="text" value="Search Setup"/> </div>					
<div> <div> <div>Setup</div> <div>Home</div> <div>Object Manager</div> </div> </div>					
<div> <div>  <div> <div>SETUP</div> <div>Object Manager</div> <div>51+ Items, Sorted by Label</div> </div> </div> <div> <input type="text" value="Quick Find"/> <div> Schema Builder Create </div> </div> </div>					
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	
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			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			
Assigned Resource	AssignedResource	Standard Object			
Associated Location	AssociatedLocation	Standard Object			
Attendees	Attendees__c	Custom Object		27/03/2023	
Authorization Form	AuthorizationForm	Standard Object			
Authorization Form Consent	AuthorizationFormConsent	Standard Object			
Authorization Form Data Use	AuthorizationFormDataUse	Standard Object			
Authorization Form Text	AuthorizationFormText	Standard Object			
Business Brand	BusinessBrand	Standard Object			
Campaign	Campaign	Standard Object			
Campaign Member	CampaignMember	Standard Object			
Card Payment Method	CardPaymentMethod	Standard Object			
Cart	WebCart	Standard Object			
Cart Adjustment Basis	WebCartAdjustmentBasis	Standard Object			
Cart Adjustment Group	WebCartAdjustmentGroup	Standard Object			

MILESTONE 7 ACTIVITY 2:



- 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.
- Create section trip info, purpose of trip field, trip start date, trip end date, out of state, destination state and department.
- Paste all these in the trip info section the information section and click save.

Hereafter we are unable to complete the milestones because information section in milestone 7 has not fixed. This is our problem.,

4. TRAIL HEAD PROFILE PUBLIC URL:

TEAM LEAD: <https://trailblazer.me/id/sswathi71>

TEAM MEMBER 1: <https://trailblazer.me/id/sarag130>

TEAM MEMBER 2: <https://trailblazer.me/id/sathk30>

TEAM MEMBER 3: <https://trailblazer.me/id/sathyap29>

5. ADVANTAGES AND DISADVANTAGES:

ADVANTAGES:

- Improving your well-being is one of the fundamental benefits of travelling.
- Travelling helps to decrease our anxiety, while developing our brain health.
- Travel really helps in consolidating both effective and social skills as you are expected to different sculptures and outlook.
- Travelling teaches you to be creative and that everything has an alternative
- Improve creativity and problem-solving skills.
- Get real life time education and enhance effective communications

DISADVANTAGES:

- Increasing number of tourists brings problem such as pollution and foot path erosion.
- Unexpected costs and emergencies.
- Your travel companion may annoy you and fear of the unknown.
- Different food and water quality.
- Adjusting to different customs and social norms.
- Things take so much longer in a new place.

6. APPLICATION:

- ❖ Starting the sample application.
- ❖ Installing the sample application.
- ❖ About the sample application and prerequisites.
- ❖ Logging in as an employee for requesting a business trip.
- ❖ Adding additional expenses to your travel request.
- ❖ Entering a travel request with flight and hotel information.

7. CONCLUSION:

In this project we had done empathy map, brain storming and idea prioritization and some other activities. After completing this project, we gain so much knowledge from the customer point of you. This project will help us about processes and how to get the approval for travelling.

8. FUTURE SCOPE:

This field involves travel management, tour management etc. It will give endless job opportunities in future.

THANKING YOU.,