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.

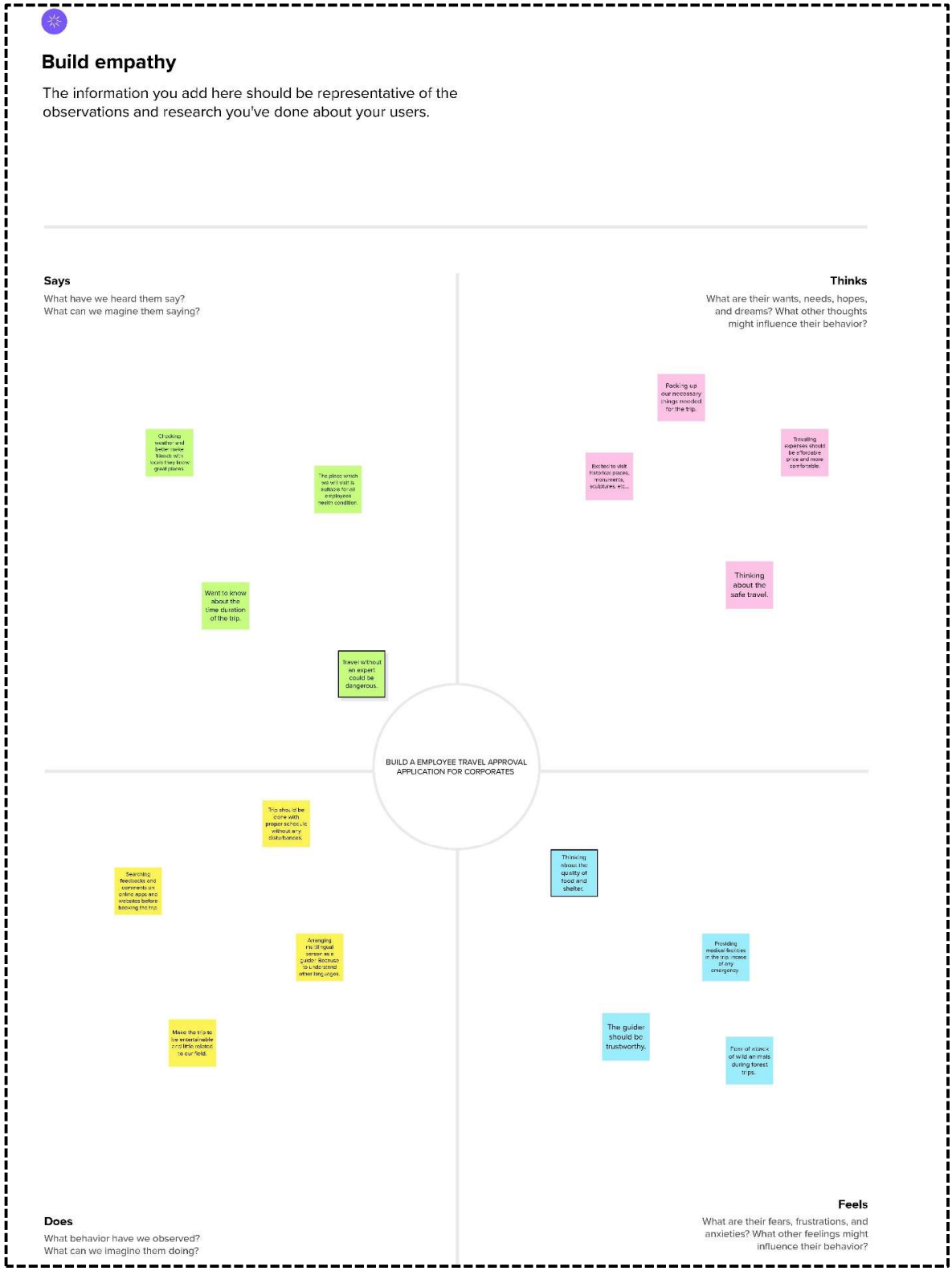
This project aims are to provide real – time knowledge for all the students who have basic knowledge of salesforce and looking for a real – time project. This will also help to those professionals who are in cross – technology and to switch to salesforce with the help of this project, we can gain knowledge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

In this project we will learn

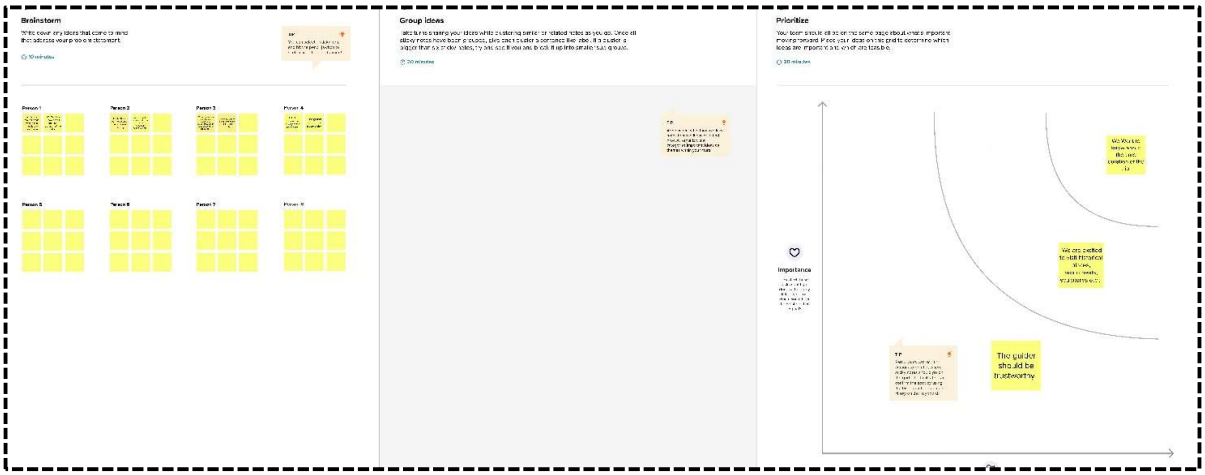
1. Real time salesforce project.
2. Object and relationship in salesforce.

2. PROBLEM DEFINITION AND DEFINE THINKING:

2.1 EMPATHY MAP:



2.2 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

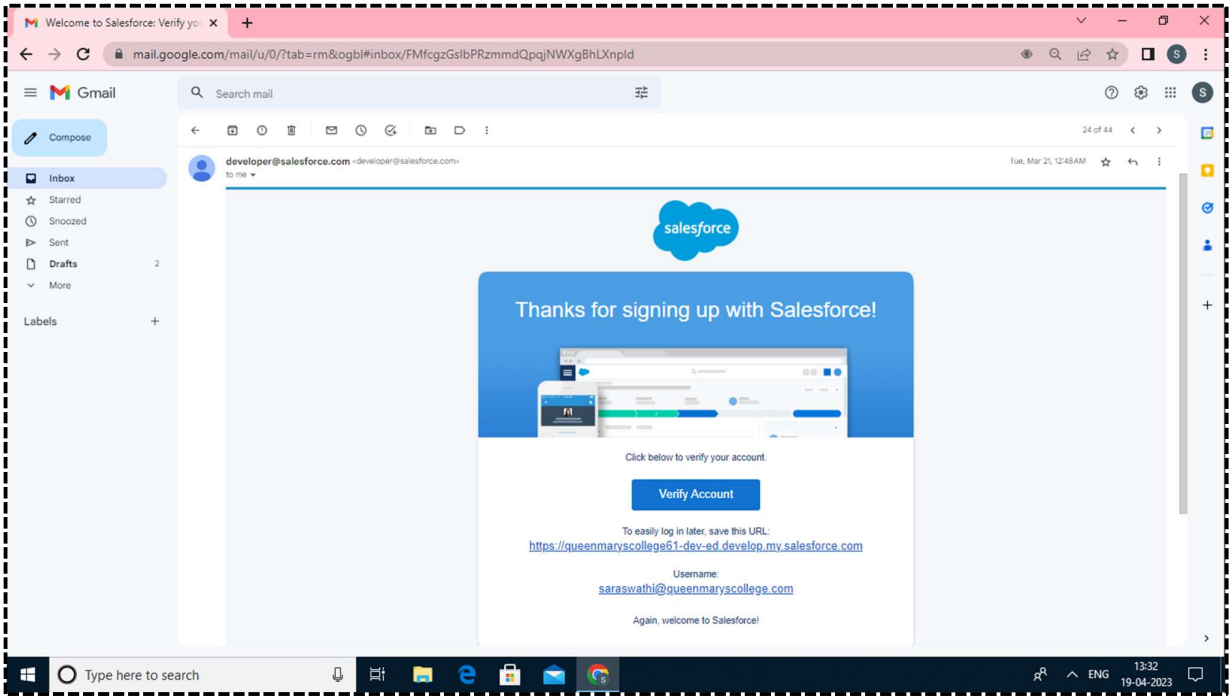
3.2 ACTIVITY & SCREENSHOTS:

MILESTONE 1 ACTIVITY 1:

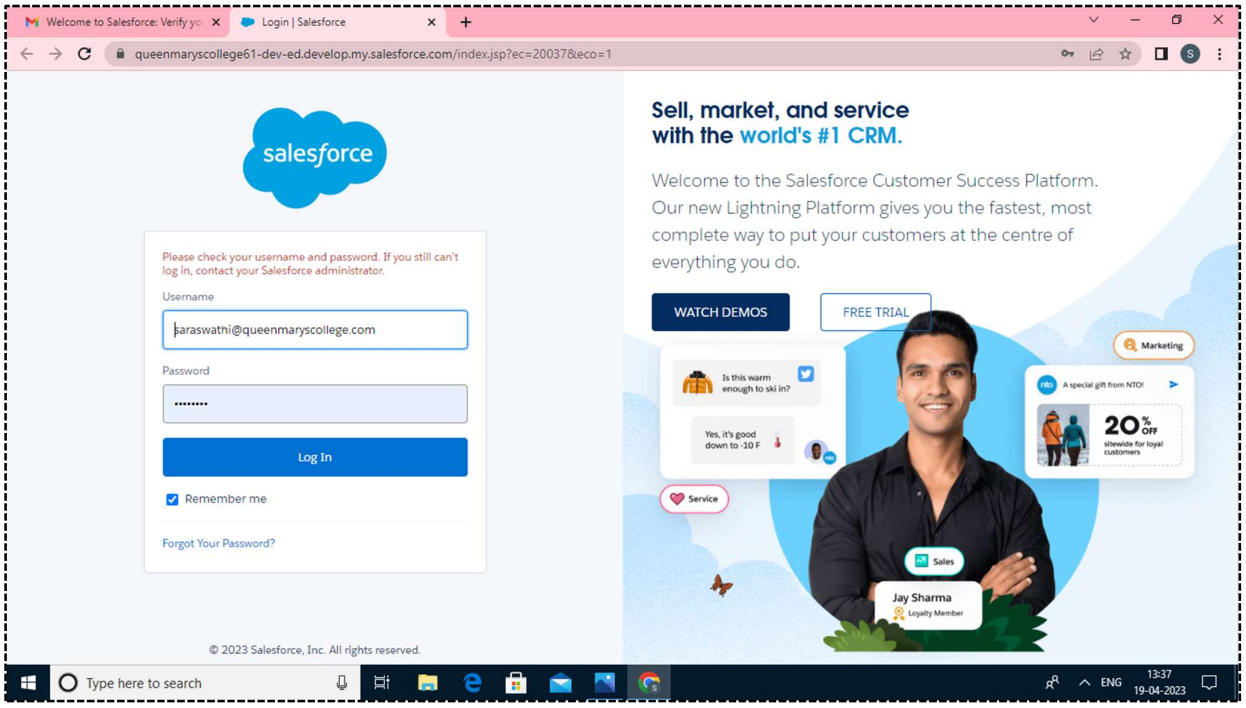
- First, we have to create the developer account.
- For this milestone, go to developers.salesforce.com/ then click on sign up and enter the following details.

- First name and last name, Email, Role, Company, Country, Postal code and Username.
- Click on sign up after filling these details.
- Next verify account then go to the salesforce.com and then click Login>Salesforce>Enter username and password.
- After Logging in, you will see the home page.

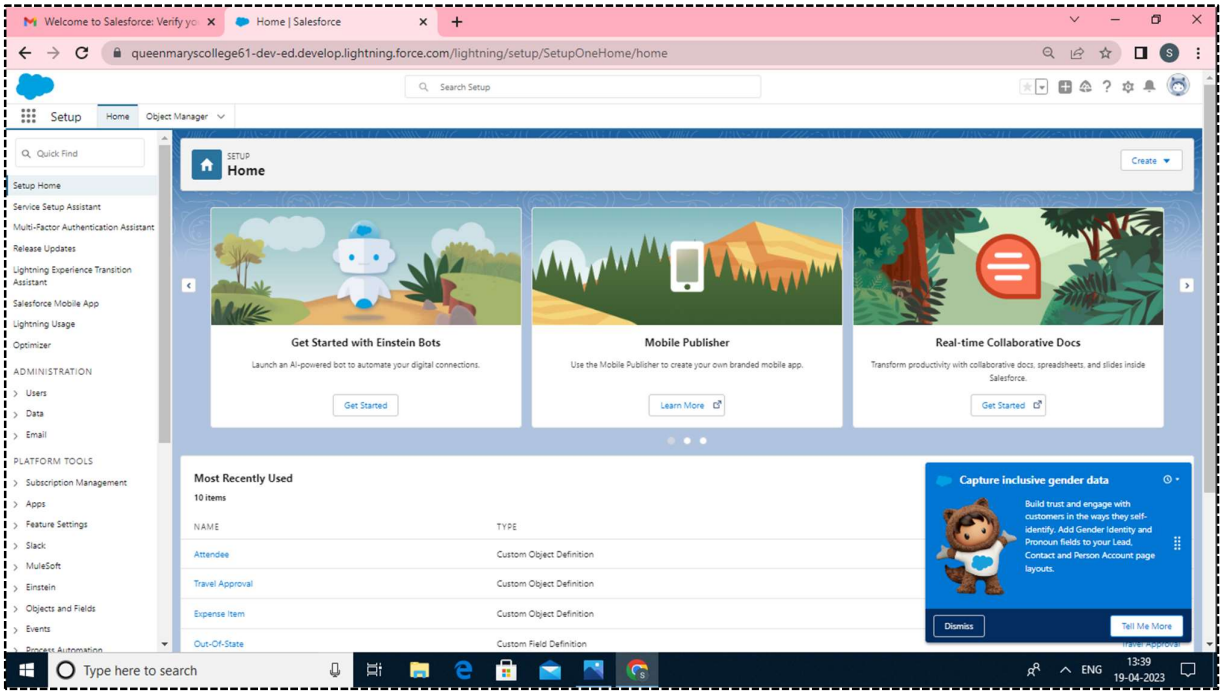
MILESTONE 1 ACTIVITY 2:



Then click the verify account.

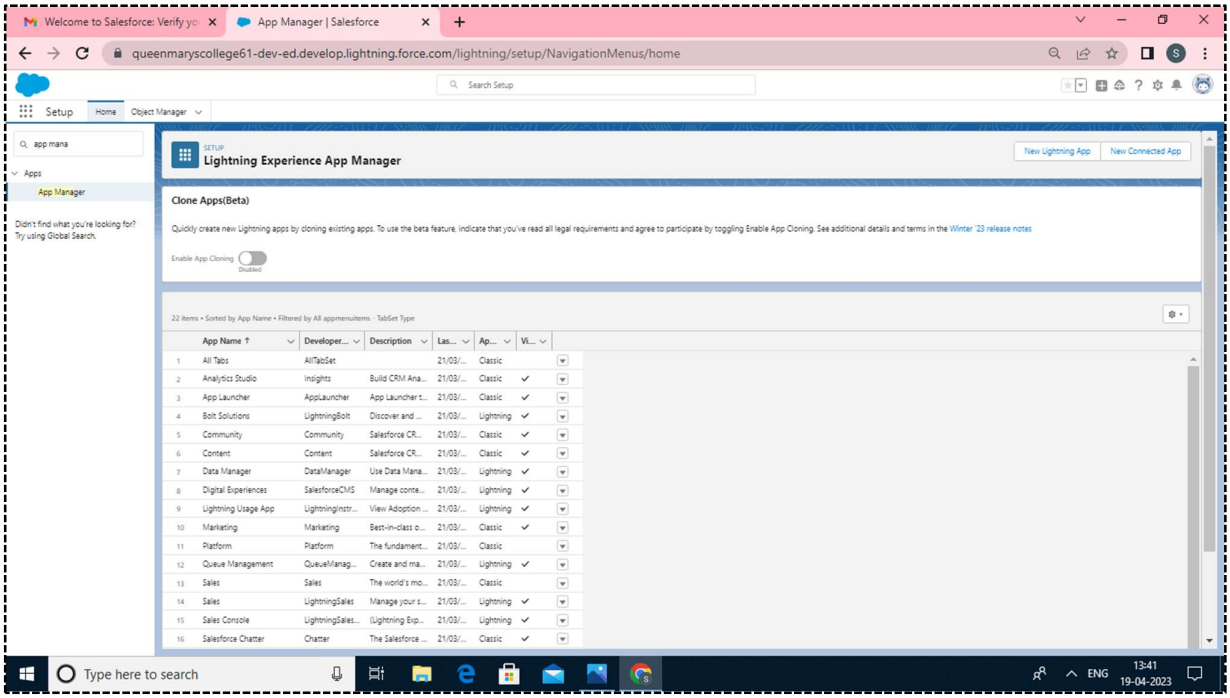


➢ After click the verify account the sales force login page will be open, after this enter username and password, then click login.



➢ This is the home page we get.

MILESTONE 2 ACTIVITY 1:

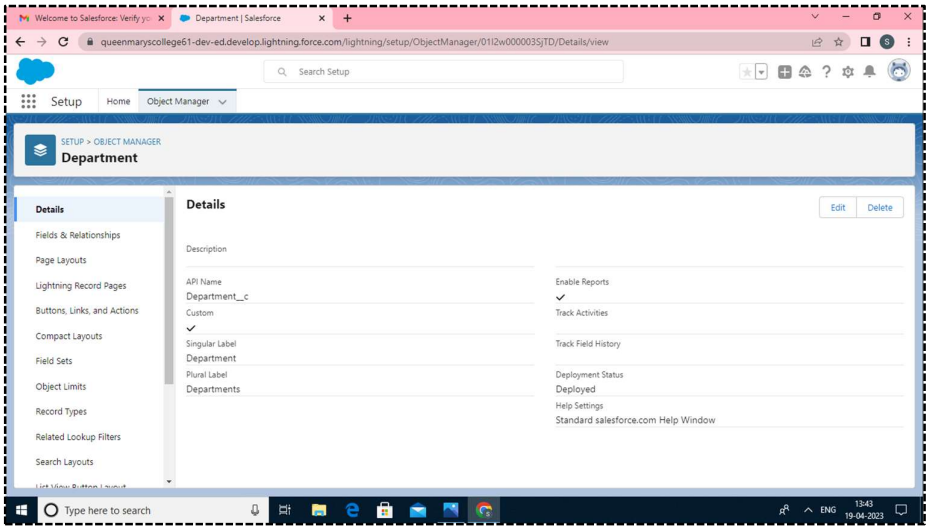


- In this milestone we created the travel application.
- From setup enter app manager in quick find then click new lightning app. As per instruction given in guideline projects enter those values and at the end click app launcher, type travel approval and select the travel application app.

MILESTONE 3 ACTIVITY 1:

- In this activity we created custom object creation.
- To create an object:
  From the setup page→ click on object manager→ click on create→ click on custom object.
- After this click save.

MILESTONE 3 ACTIVITY 2:


Welcome to Salesforce: Verify yo
Department | Salesforce
queenmaryscollege61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003SjTD/Details/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Department
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
Details
Edit
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Description
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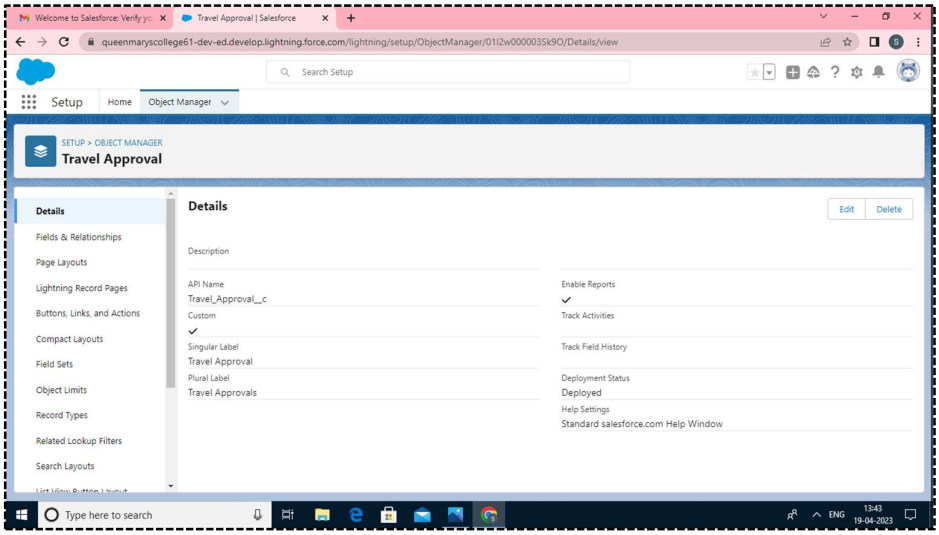
Custom
Singular Label
Department
Plural Label
Departments
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
Type here to search
ENG
13:43
19-04-2023


Welcome to Salesforce: Verify yo
Travel Approval | Salesforce
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Search Setup
Setup
Home
Object Manager
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
Details
Edit
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Description
API Name
Travel_Approval__c
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Travel Approval
Plural Label
Travel Approvals
Enable Reports
Track Activities
Track Field History
Deployment Status
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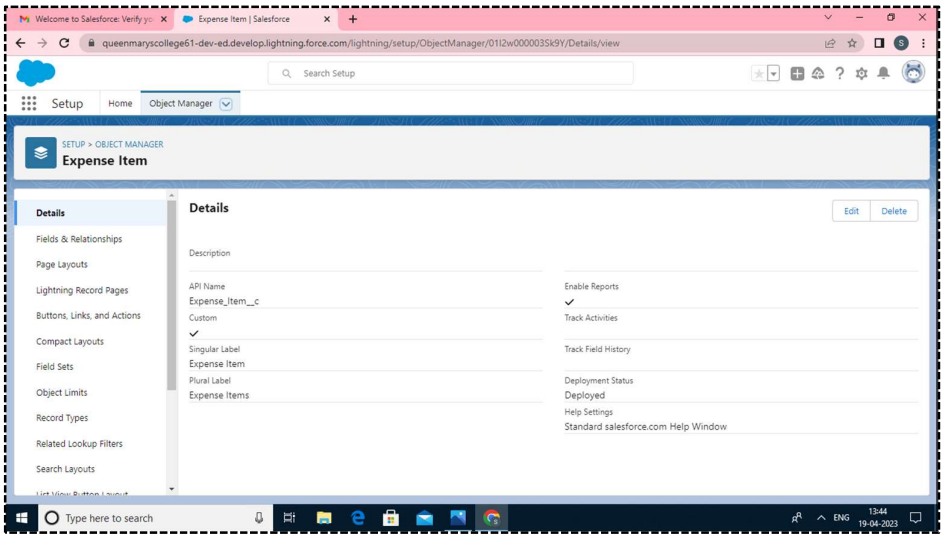
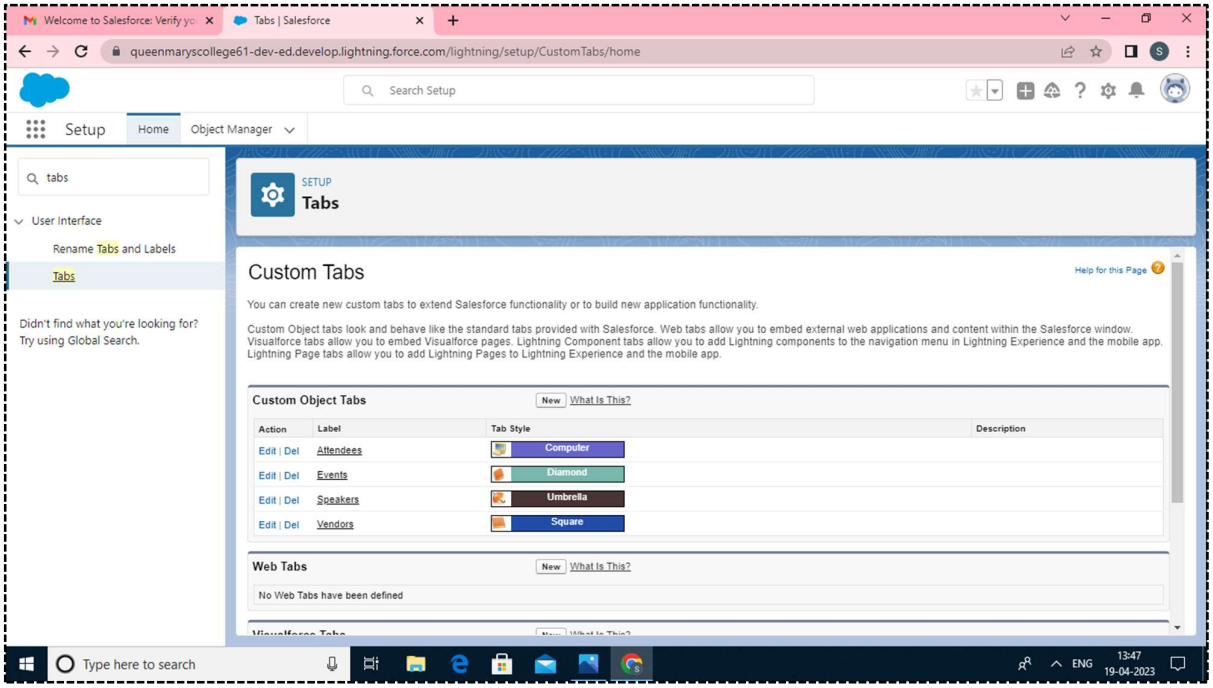

Welcome to Salesforce: Verify yo
Expense Item | Salesforce
queenmaryscollege61-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003Sk9Y/Details/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Expense Item
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Details
Edit
Delete
Description
API Name
Expense_Item__c
Custom
Singular Label
Expense Item
Plural Label
Expense Items
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
Type here to search
ENG
13:44
19-04-2023

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

MILESTONE 4 ACTIVITY 1:



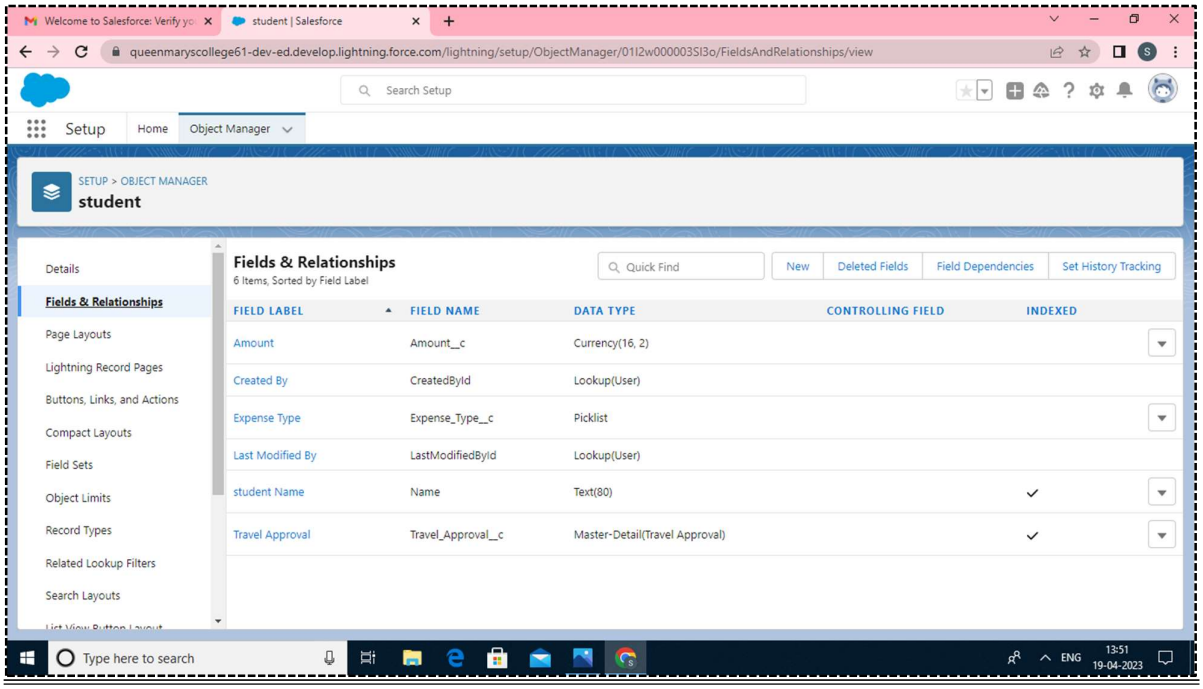
- There are four types of tabs, they are standard object, custom object, web visual force tab.
- Now create a custom tab.
- Click home tabs and enter tabs in quick find.
- Under custom object tabs click new.
- For object, select event. For tab style select any icon as your wish.
- Leave default as is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

MILESTONE 4 (CREATE FIELDS AND REALTIONSHIPS):

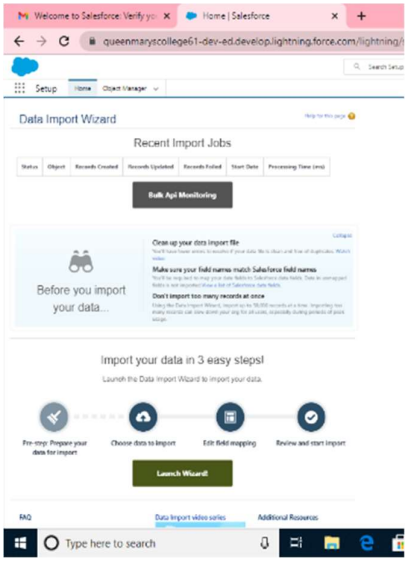
ACTIVITY 1, 2, 3:

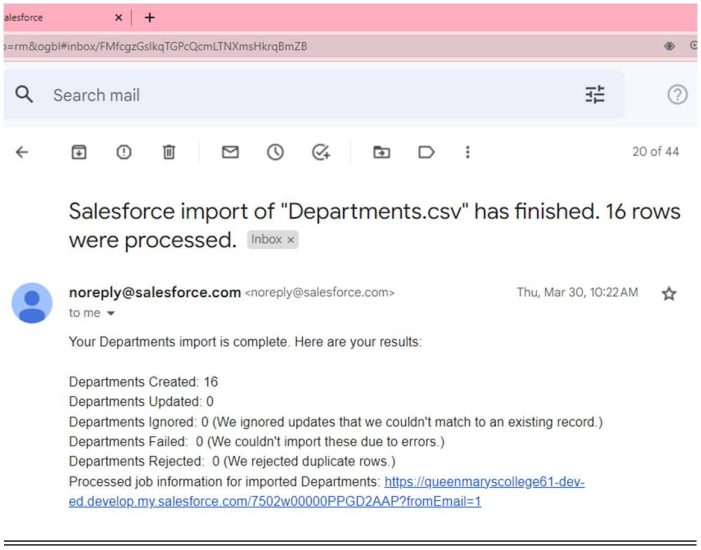
- In this activity we must create field and relationship. There are two types of fields. They are standard fields and custom fields.

- Now click fields and relationship and click new.
- For data type select currency then 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 data type.
- Select enter values 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.



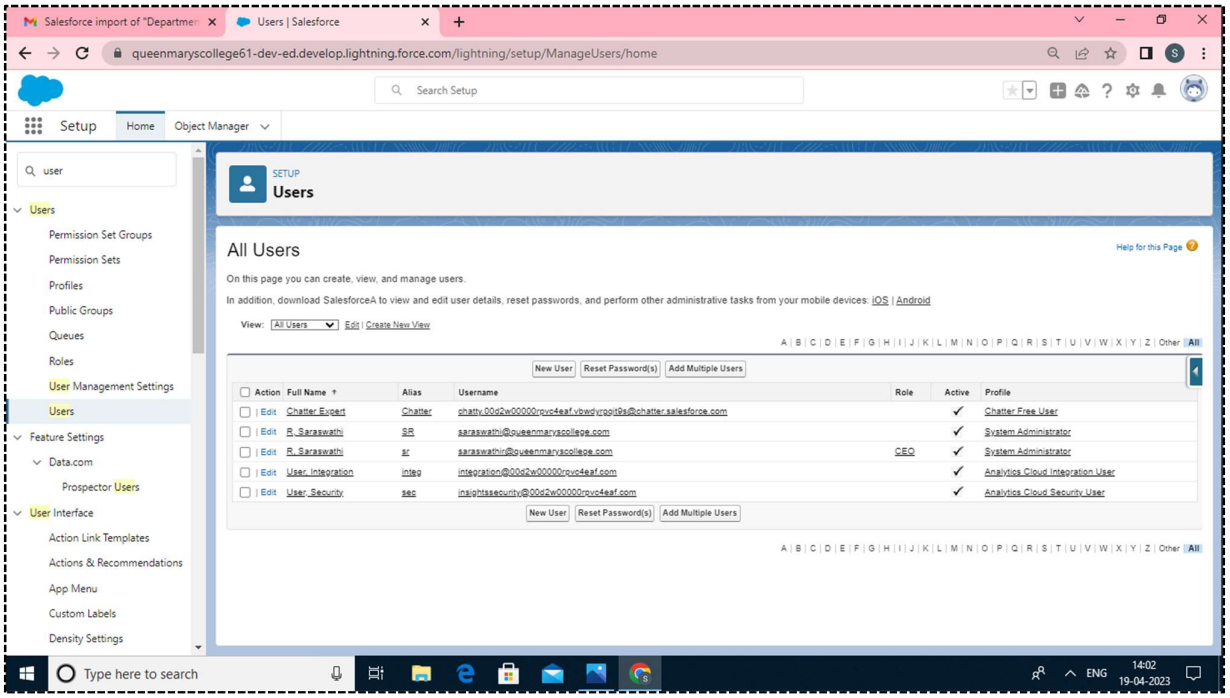
MILESTONE 5 ACTIVITY 1:

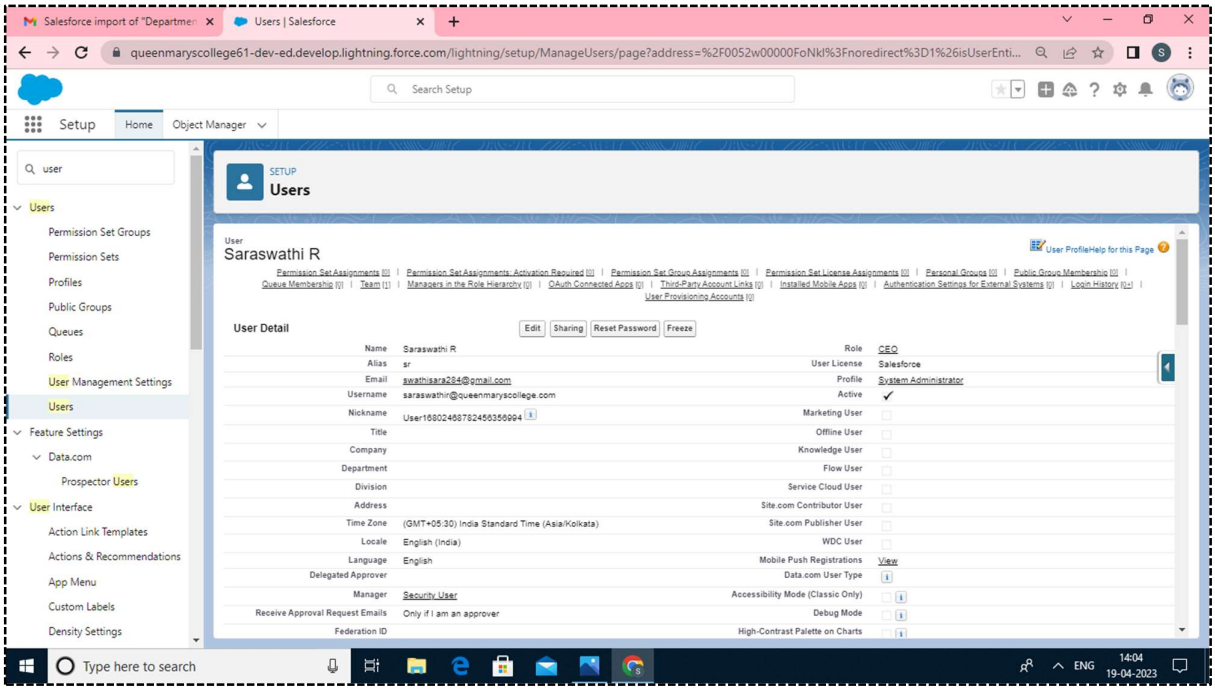




- In order to complete this activity, you need to download the reference file.
- In quick find box enter data import and select data import wizard then click launch wizard.
- Click the custom object tab and select the department object.
- Next drag and drop the Departments.csv file. You downloaded using 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 ACTIVITY 1:



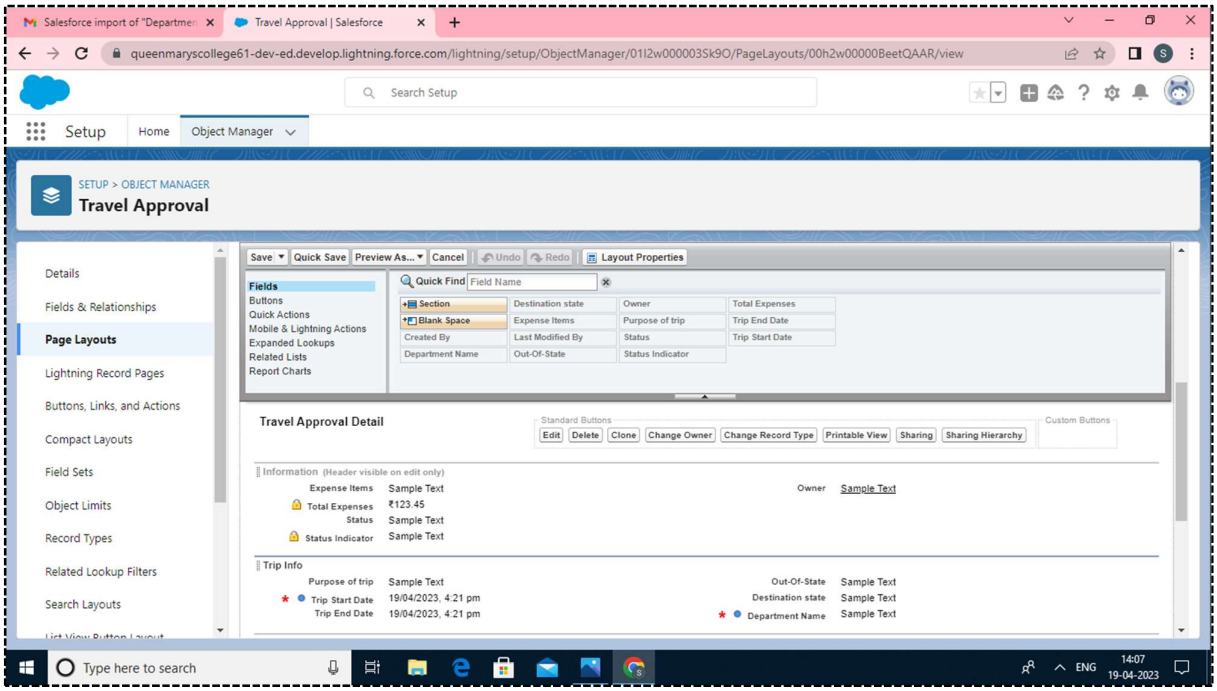


- Enter users in the quick find box and select users then click new user.
- Next give the name as you wish.
- Give the role as CEO, profile as system administrator and licenses sales force.

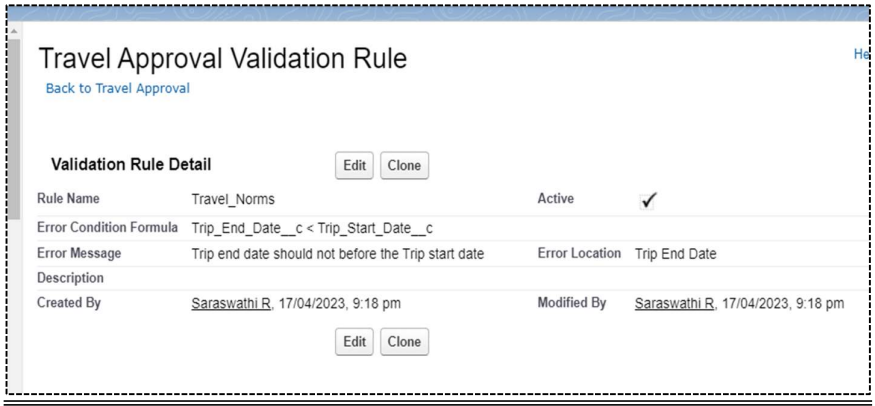
- From setup, enter users in the quick box and select users then edit.
- Scroll down to approval settings set your manager as user you have created recently.
- Click save.

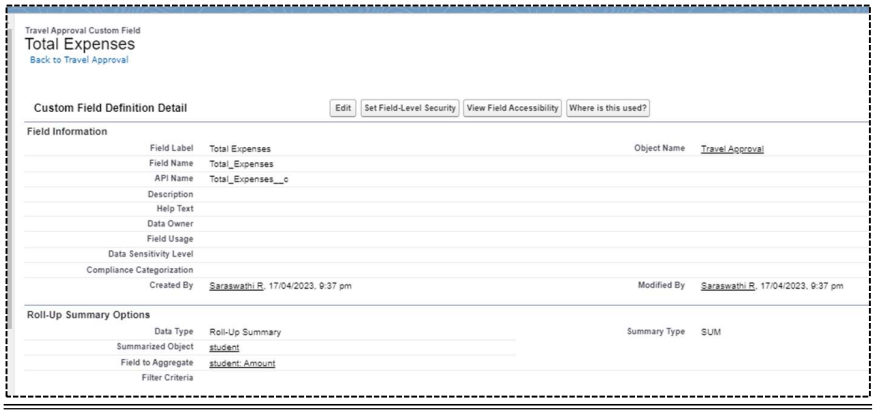
MILESTONE 7 ACTIVITY 1:

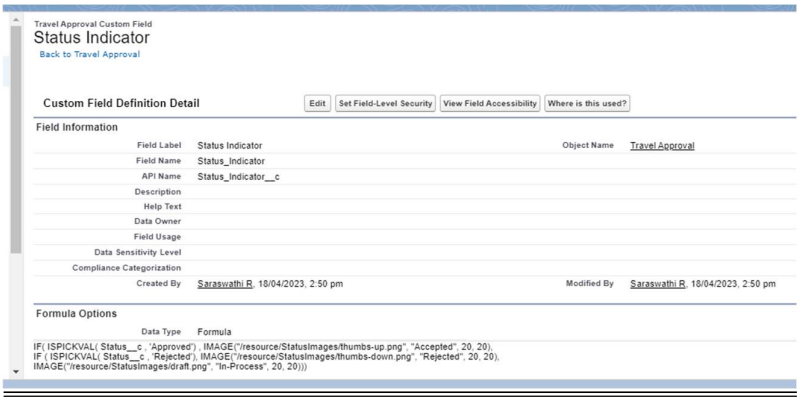
- In this activity we should customize travel approval object page layout.
- From the object manager search for the travel approval object and click on page layouts and click edit.
- We create section trip info, purpose of trip field, trip start date, trip end date, out of state and destination state then department and paste these in trip info section below the information section then click save.



MILESTONE 8 ACTIVITY 1,2,3:





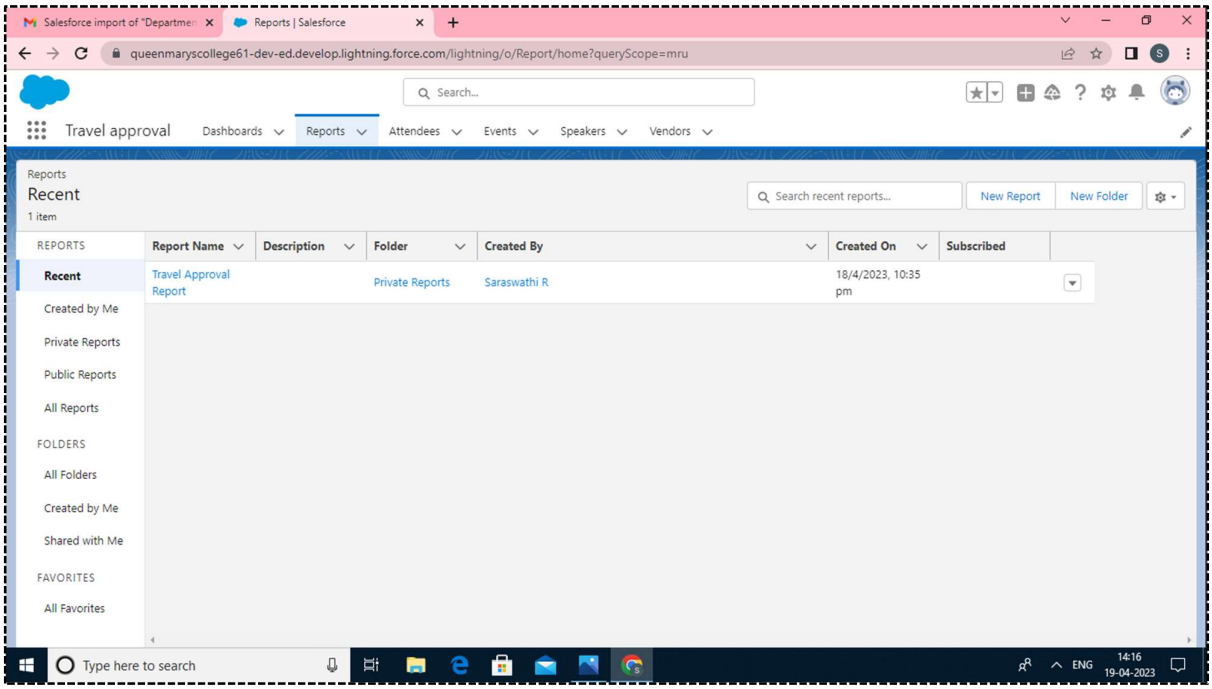


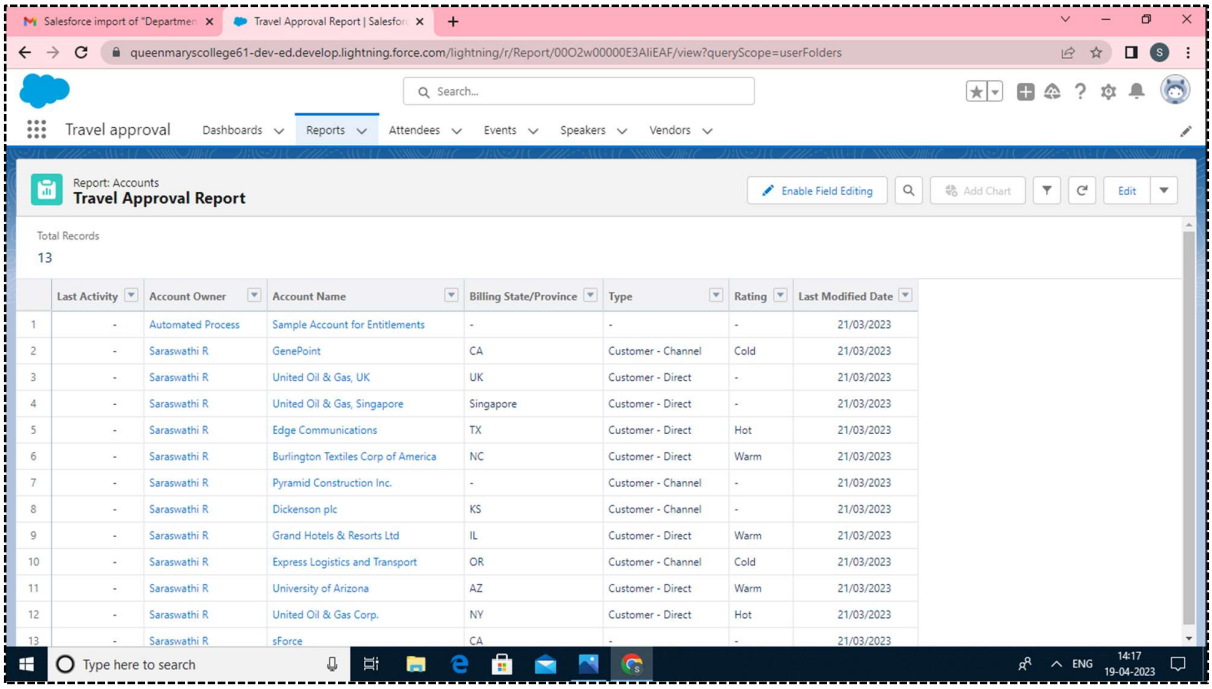
- In this milestone we just created validation rules, roll up summary fields, formula fields, workflows and approval.
- As per salesforce guided pdf we created it.

MILESTONE 10 ACTIVITY:

- In this activity we should create a report.
- Go to the app→ click on the reports tab.

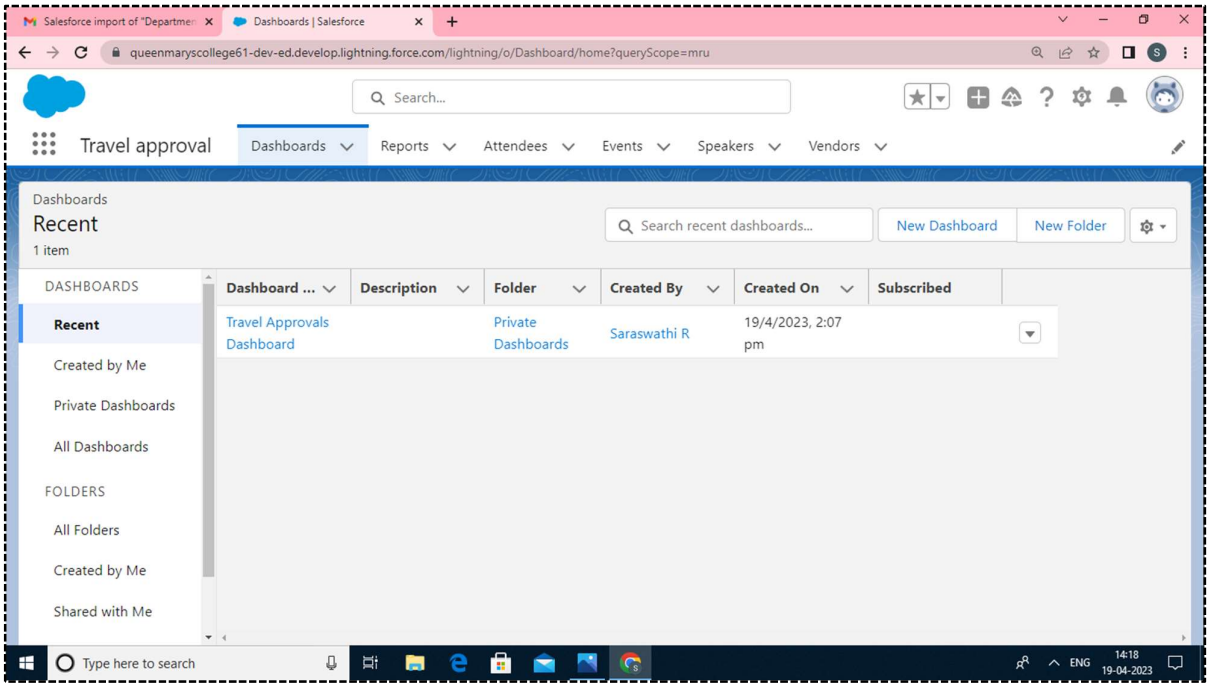
- Click new report.
- Click on start report.
- Customize your report, then save or run it.

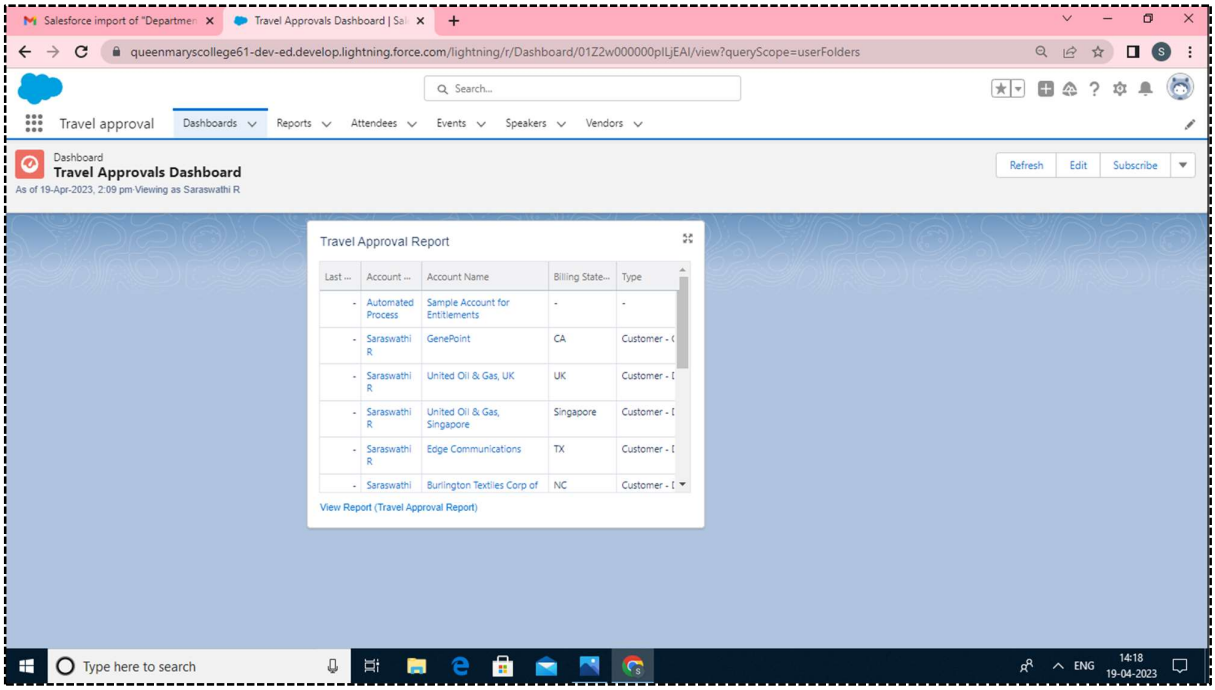




MILESTONE 11:

DASHBOARDS:





- Finally, 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 and select the report, then save and done it.

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:

- We had learned the new things which helps to add in our resume well.
- In the empathy map, we think a lot to complete the tasks.
- We also learned the soft skills such as team work, group discussion, leadership quality, perfection etc.
- 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:

- In empathy map and brain storming templates we faced a lot of difficulties because there are very few numbers of trails.
- In the sales force instructions pdf contain not much clear steps to complete the milestones.

- 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:

- A Travel approval project is an application for booking travel reservations, tracking loyalty points and browsing travel packages.
- About the sample application and prerequisites.
- Installing the sample application.
- Starting the sample application.
- Logging in as an employee for requesting a business trip.
- Entering a travel request with flight and hotel information.
- Adding additional expenses to your travel request.

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.,