

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:



Build empathy

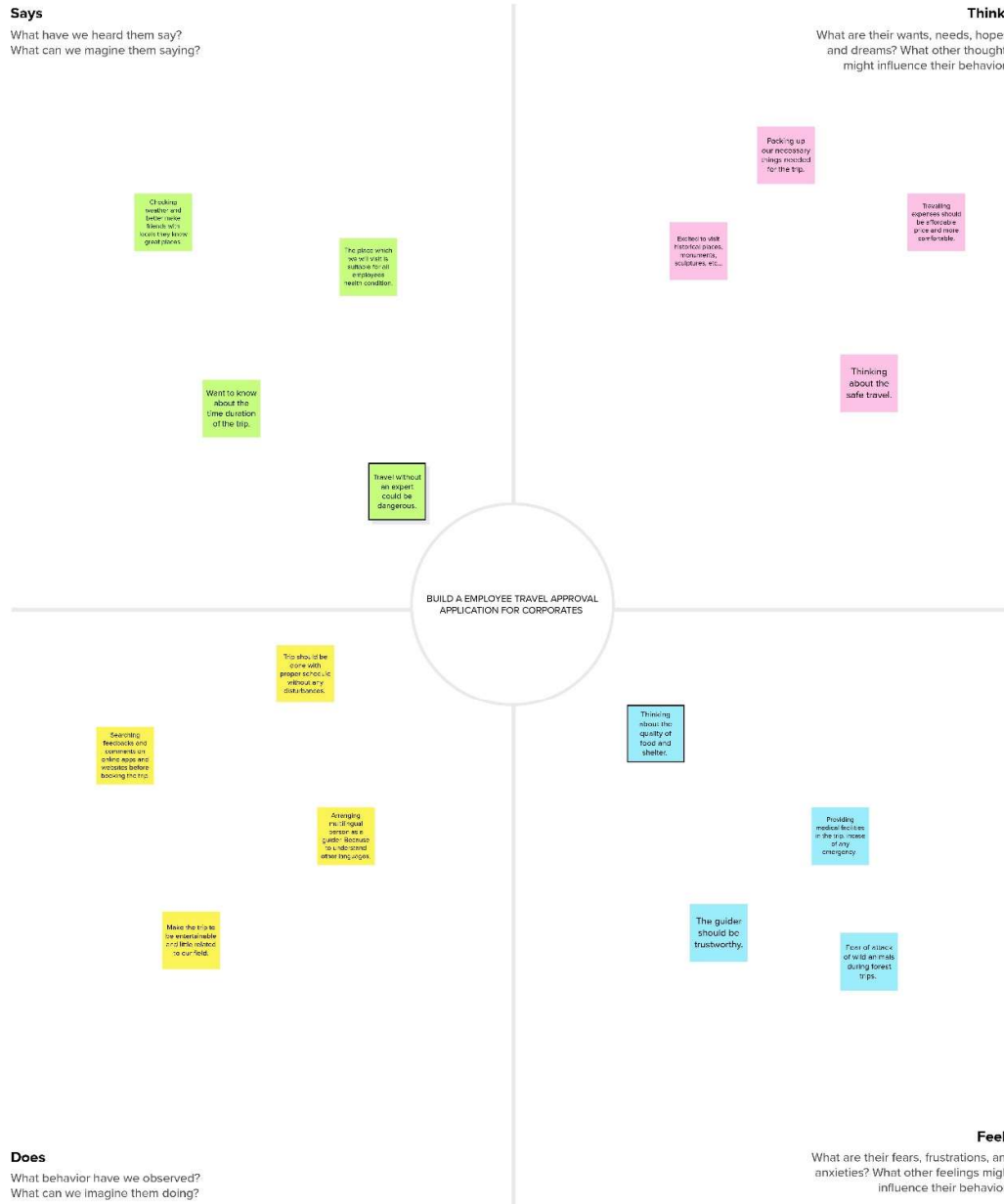
The information you add here should be representative of the observations and research you've done about your users.

Says

What have we heard them say?
What can we imagine them saying?

Thinks

What are their wants, needs, hopes,
and dreams? What other thoughts
might influence their behavior?



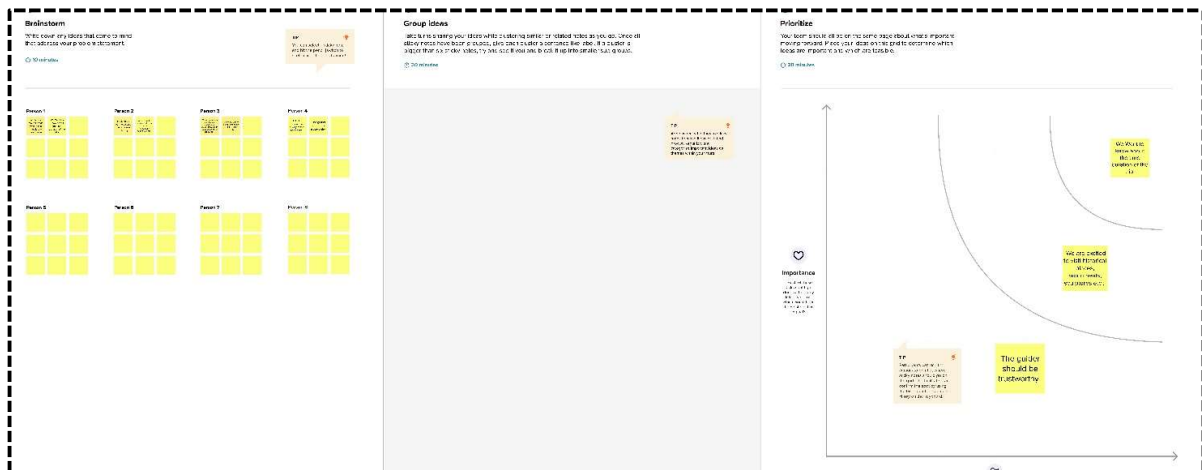
Does

What behavior have we observed?
What can we imagine them doing?

Feels

What are their fears, frustrations, and
anxieties? What other feelings might
influence their behavior?

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:

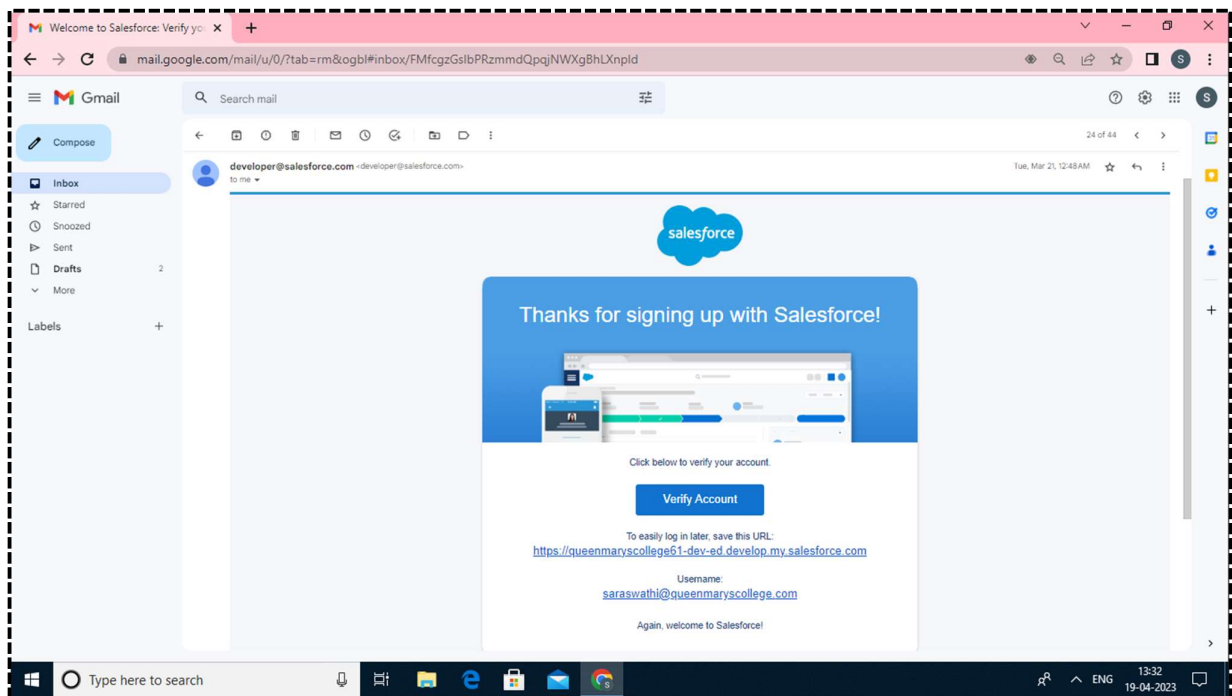


MILESTONE 1 ACTIVITY 1:

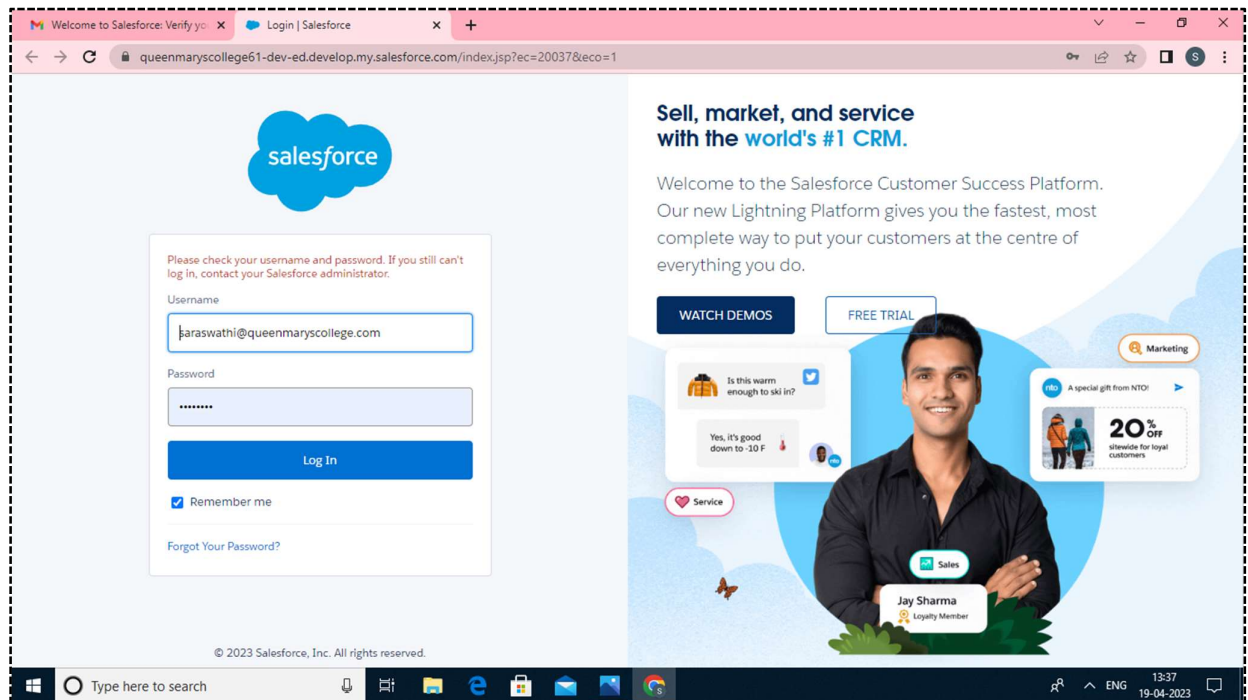
- First, we have to create the developer account.
- For this milestone, go to developers.salesforce.com/ then click on sign up and enter the following details.

- 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.

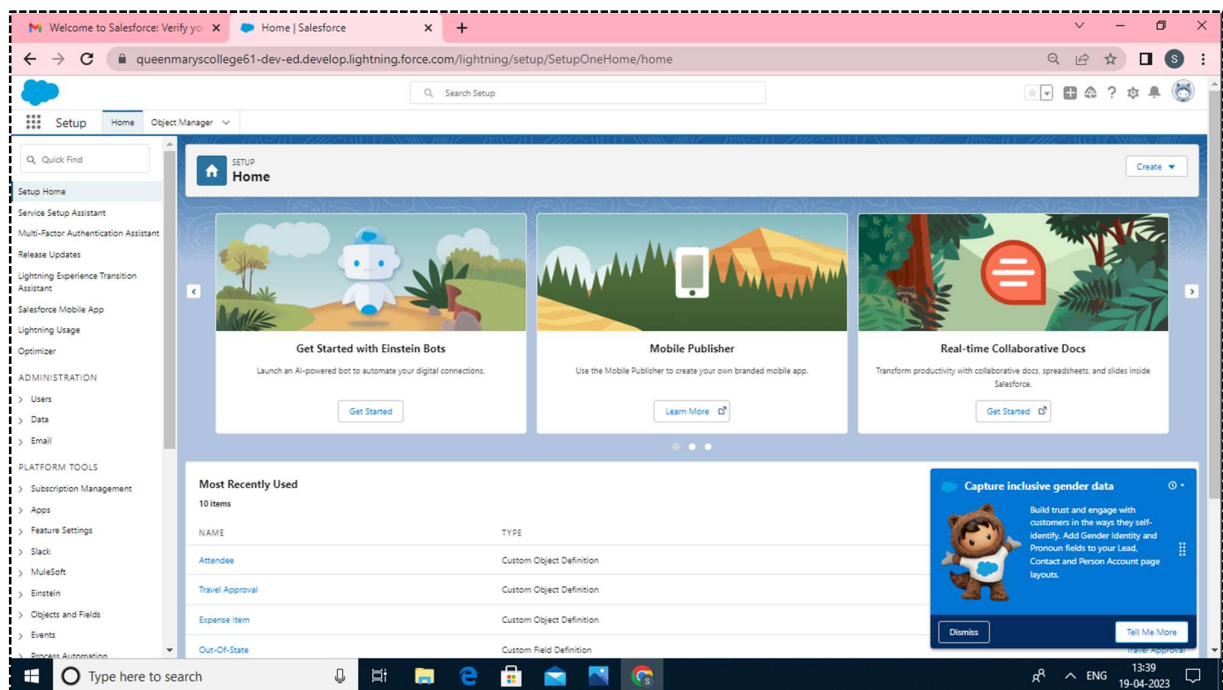
MILESTONE 1 ACTIVITY 2:



Then click the verify account.

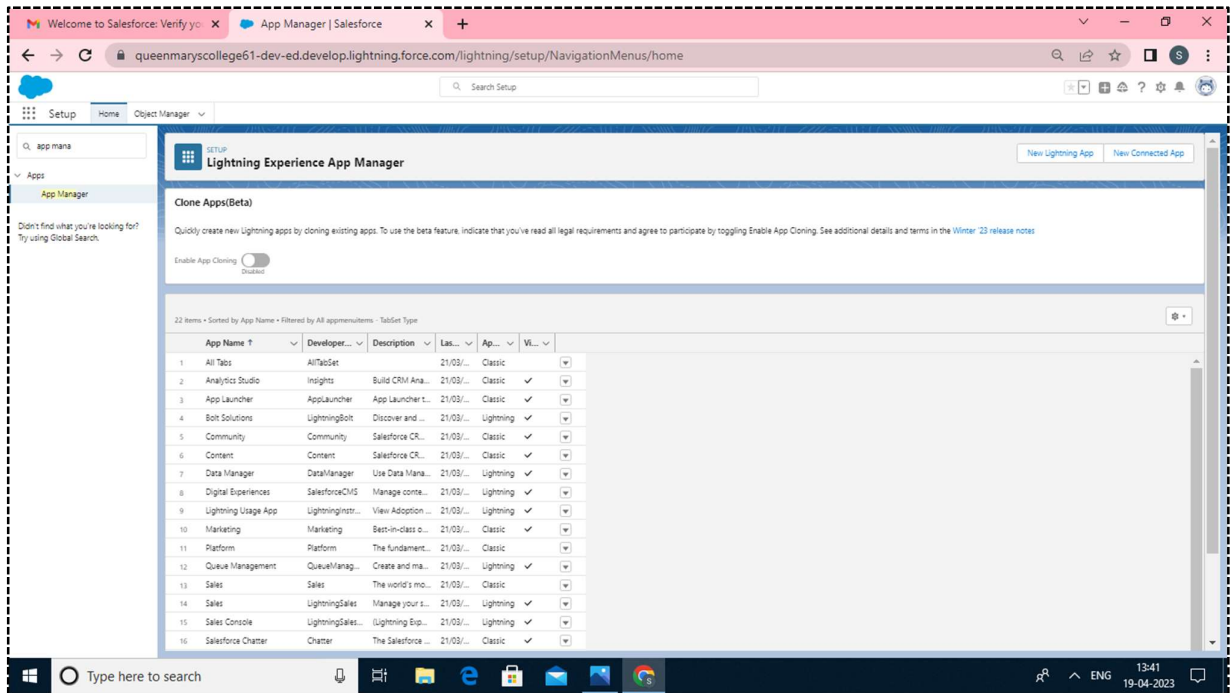


- After click the verify account the sales force login page will be open, after this enter username and password, then click login.



- This is the home page we get.

MILESTONE 2 ACTIVITY 1:

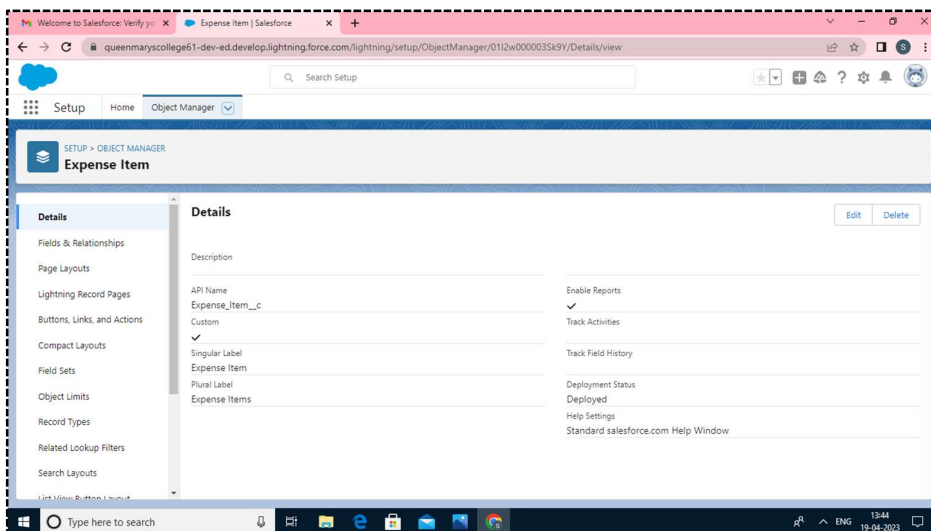
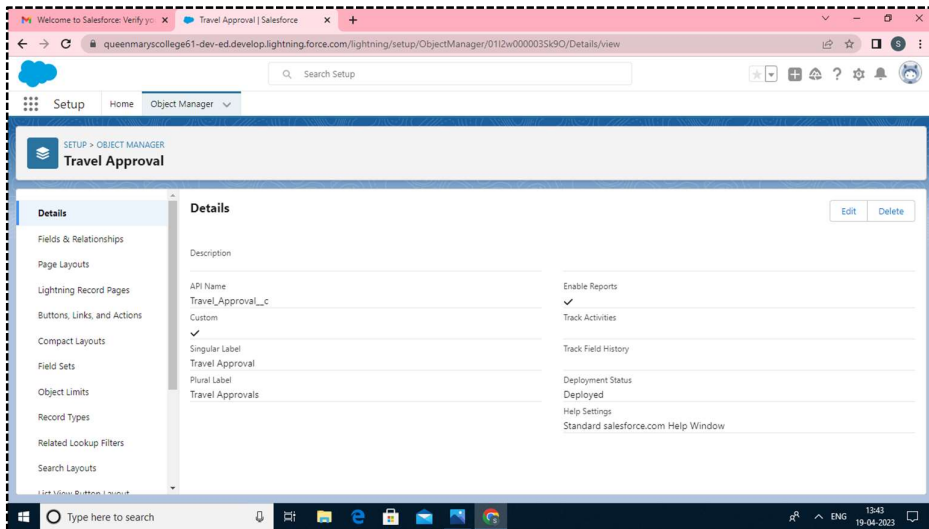
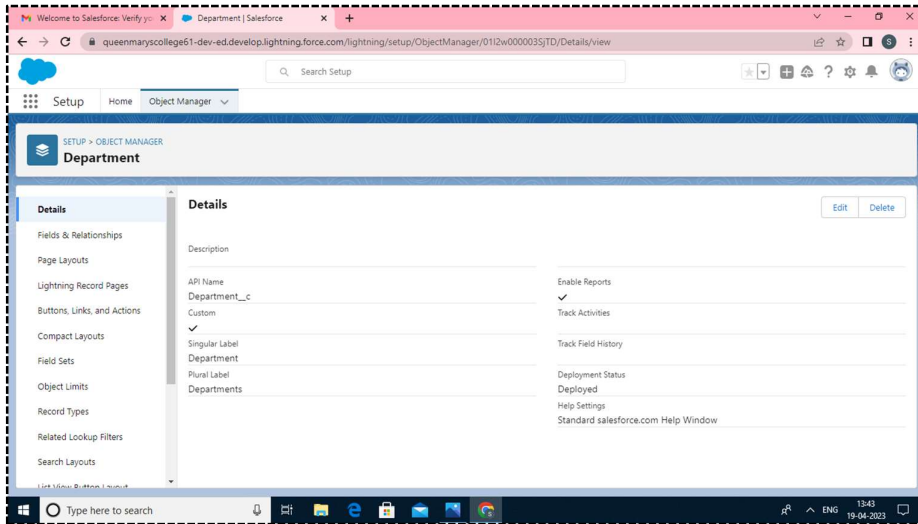


- In this milestone we created the travel application.
- From setup enter app manager in quick find then click new lightning app. As per instruction given in guideline projects enter those values and at the end click app launcher, type travel approval and select the travel application app.

MILESTONE 3 ACTIVITY 1:

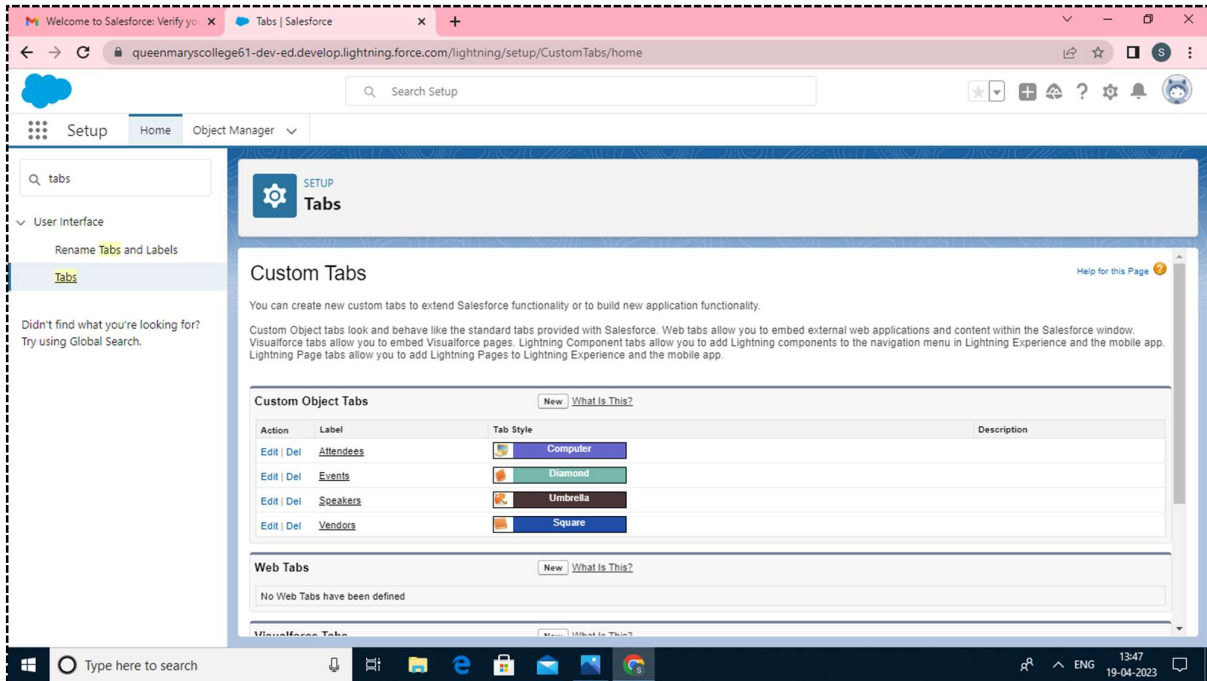
- In this activity we created custom object creation.
- To create an object:
From the setup page → click on object manager → click on create → click on custom object.
- After this click save.

MILESTONE 3 ACTIVITY 2:



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

MILESTONE 4 ACTIVITY 1:



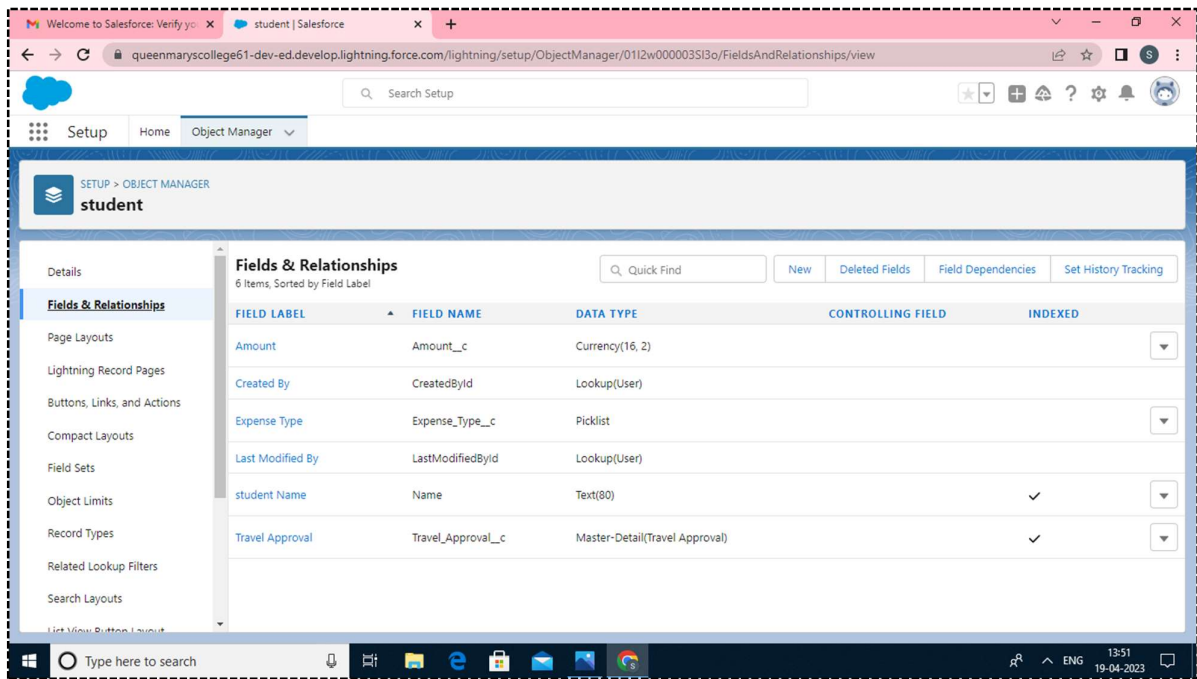
- There are four types of tabs, they are standard object, custom object, web visual force tab.
- Now create a custom tab.
- Click home tabs and enter tabs in quick find.
- Under custom object tabs click new.
- For object, select event. For tab style select any icon as your wish.
- Leave default as is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

MILESTONE 4 (CREATE FIELDS AND REALTIONSHPIS):

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.



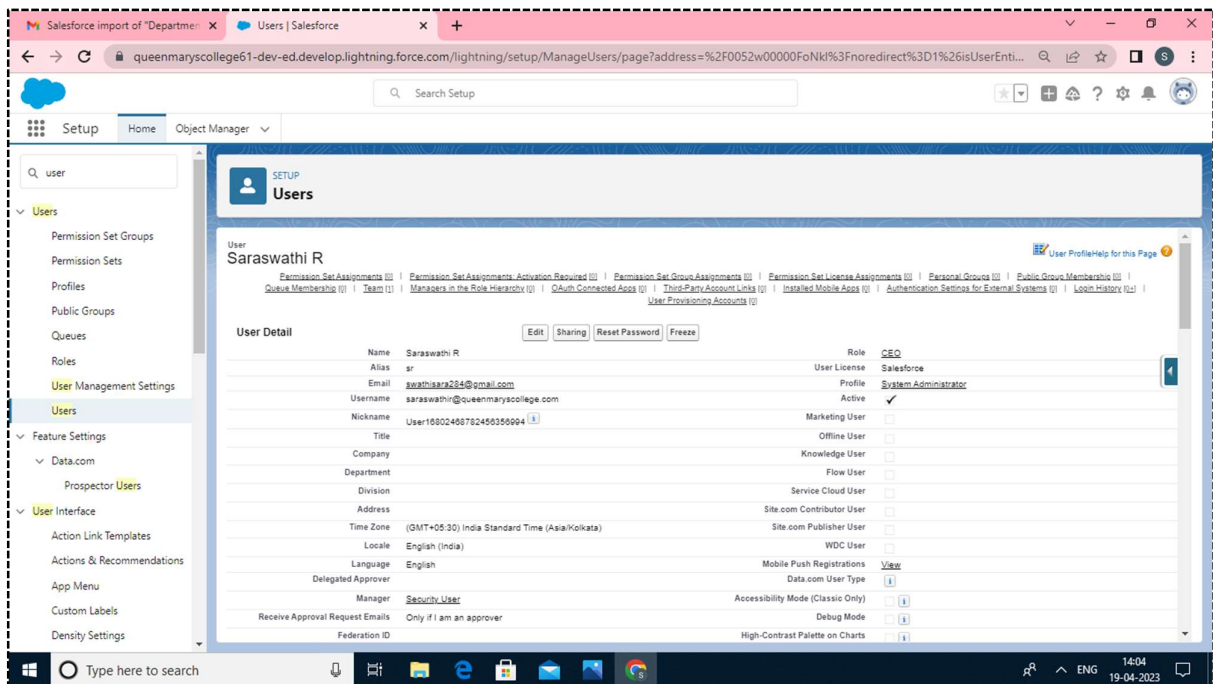
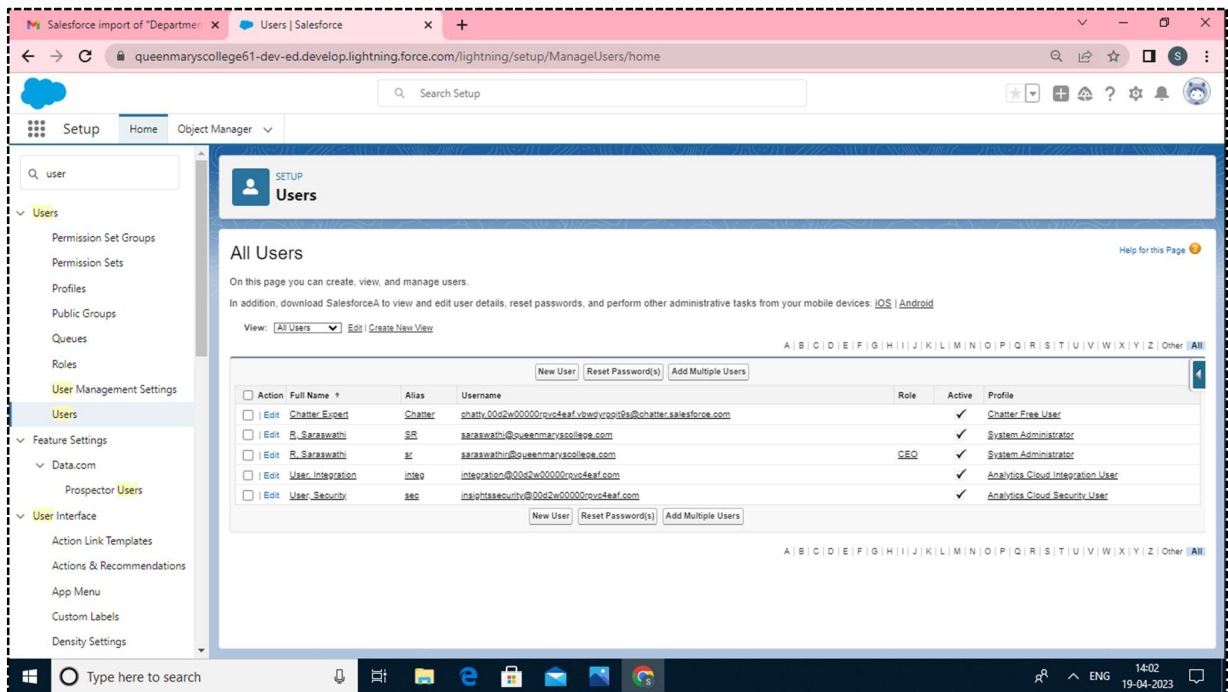
MILESTONE 5 ACTIVITY 1:

The left screenshot displays the Salesforce 'Data Import Wizard' page. It includes a 'Recent Import Jobs' table with columns for Status, Object, Records Created, Records Updated, Records Failed, Start Date, and Processing Time (min). Below the table is a 'Bulk API Monitoring' button. A section titled 'Before you import your data...' provides instructions on file naming and record limits. A '3 easy steps' process flow is shown: 'Pre-Import: Prepare your data for import', 'Choose data to import', 'Edit field mapping', and 'Review and start import'. A 'Launch Wizard' button is prominently displayed.

The right screenshot is an email from noreply@salesforce.com. The subject line is 'Salesforce import of "Departments.csv" has finished. 16 rows were processed.' The email body states: '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.)'. It also provides a link for processed job information.

- 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:

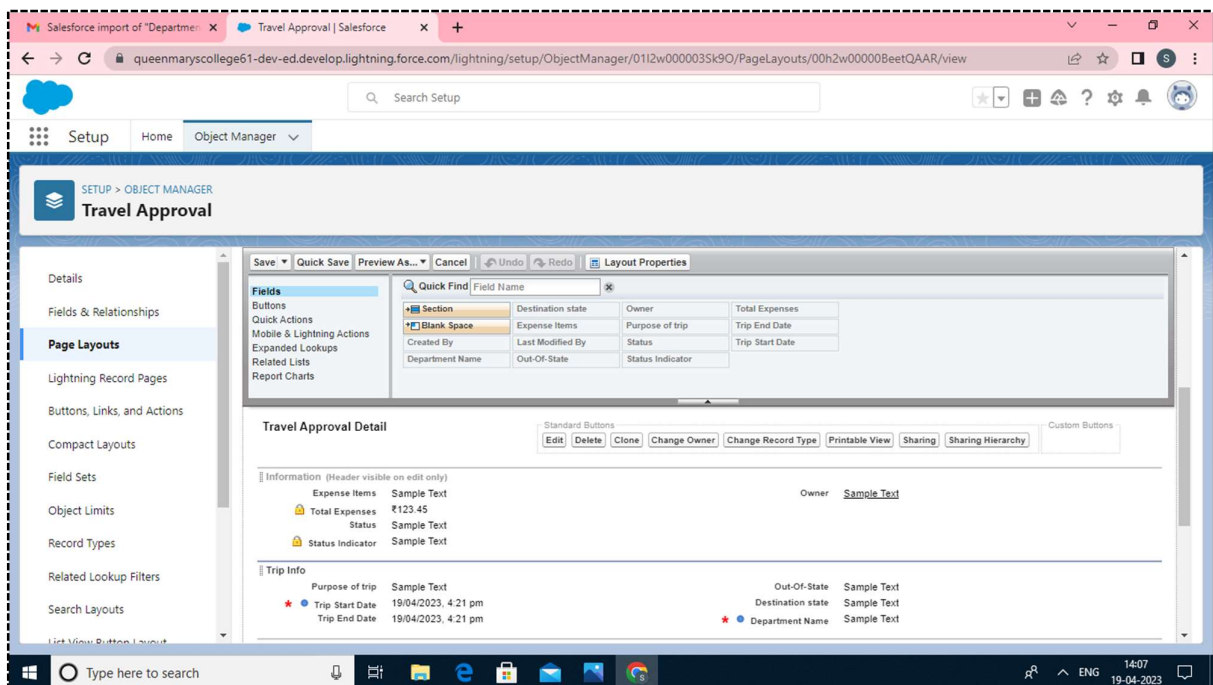


- Enter users in the quick find box and select users then click new user.
- Next give the name as you wish.
- Give the role as CEO, profile as system administrator and licenses sales force.

- 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.



The screenshot displays the Salesforce Object Manager interface for the 'Travel Approval' object. The left sidebar shows the navigation menu with 'Page Layouts' selected. The main content area shows the 'Travel Approval Detail' page layout editor. The layout includes a 'Section' header and a 'Fields' list. The 'Fields' list contains the following fields:

Field Name	Field Type
Destination state	Text
Owner	Text
Total Expenses	Text
Purpose of trip	Text
Trip End Date	Date
Trip Start Date	Date
Status	Text
Status Indicator	Text
Created By	Text
Last Modified By	Text
Department Name	Text
Out-Of-State	Text

The 'Travel Approval Detail' section shows the following fields:

Field Name	Field Type
Expense Items	Text
Total Expenses	Text
Status	Text
Status Indicator	Text
Purpose of trip	Text
Trip Start Date	Date
Trip End Date	Date
Out-Of-State	Text
Destination state	Text
Department Name	Text

MILESTONE 8 ACTIVITY 1,2,3:

Travel Approval Validation Rule

[Back to Travel Approval](#)

Validation Rule Detail [Edit](#) [Clone](#)

Rule Name	Travel_Norms	Active	✓
Error Condition Formula	Trip_End_Date__c < Trip_Start_Date__c		
Error Message	Trip end date should not before the Trip start date	Error Location	Trip End Date
Description			
Created By	Saraswathi R, 17/04/2023, 9:18 pm	Modified By	Saraswathi R, 17/04/2023, 9:18 pm

[Edit](#) [Clone](#)

Travel Approval Custom Field

[Back to Travel Approval](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Total Expenses	Object Name	TravelApproval
Field Name	Total_Expenses		
API Name	Total_Expenses__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Saraswathi R, 17/04/2023, 9:37 pm	Modified By	Saraswathi R, 17/04/2023, 9:37 pm

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	SUM
Summarized Object	student		
Field to Aggregate	student.Amount		
Filter Criteria			

Static Resources

[Back to Travel Approval](#)

Static Resource Detail [Edit](#) [Delete](#) [Where is this used?](#)

Name	StatusImages
Namespace Prefix	
Description	
MIME Type	application/pdf
Cache Control	Private
Size	8.56 KB (8736 bytes)
Version	1.0
Created By	Saraswathi R, 17/04/2023, 10:28 pm
Last Modified By	Saraswathi R, 17/04/2023, 10:28 pm

[Edit](#) [Delete](#) [Where is this used?](#)

Travel Approval Custom Field

[Back to Travel Approval](#)

Status Indicator

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Status Indicator	Object Name	TravelApproval
Field Name	Status_Indicator		
API Name	Status_Indicator__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Saraswathi R, 18/04/2023, 2:50 pm	Modified By	Saraswathi R, 18/04/2023, 2:50 pm

Formula Options

Data Type	Formula
Formula	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)))

- 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.

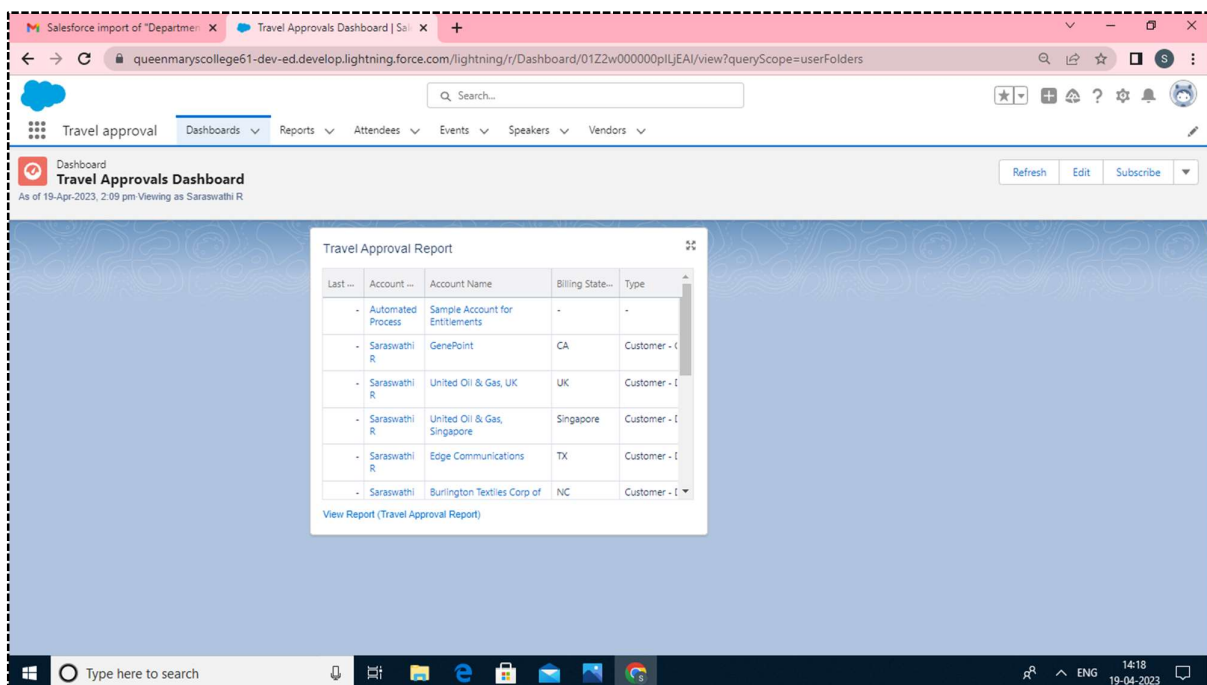
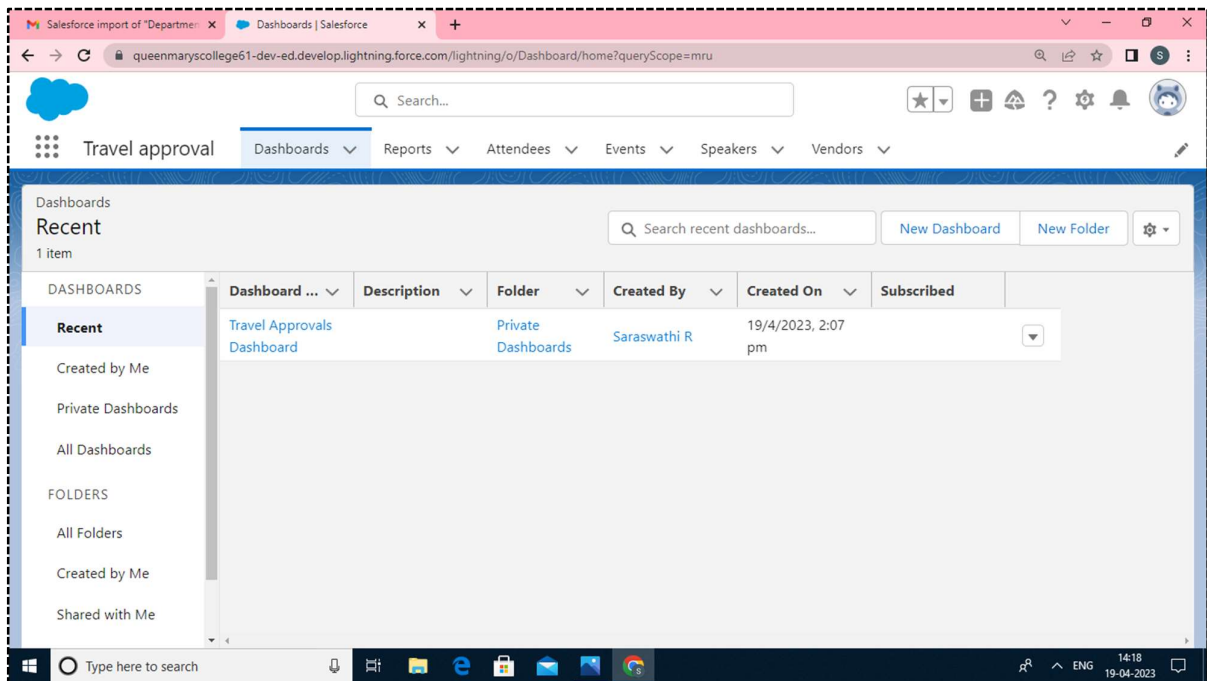
The screenshot shows the Salesforce Reports interface. The browser address bar displays the URL: `queenmarycollege61-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrui`. The page header includes the Salesforce logo, a search bar, and navigation tabs: Travel approval, Dashboards, Reports (selected), Attendees, Events, Speakers, and Vendors. The main content area is titled 'Reports' and 'Recent', showing a list of reports. A sidebar on the left contains navigation links for 'REPORTS' (Recent, Created by Me, Private Reports, Public Reports, All Reports), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES' (All Favorites). The report list has columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. One report is visible: 'Travel Approval Report' in the 'Private Reports' folder, created by 'Saraswathi R' on '18/4/2023, 10:35 pm'.

The screenshot shows the 'Travel Approval Report' in Salesforce. The browser address bar displays the URL: `queenmarycollege61-dev-ed.develop.lightning.force.com/lightning/r/Report/0002w00000E3AIIIEAF/view?queryScope=userFolders`. The page header includes the Salesforce logo, a search bar, and navigation tabs: Travel approval, Dashboards, Reports (selected), Attendees, Events, Speakers, and Vendors. The main content area is titled 'Report: Accounts' and 'Travel Approval Report'. It includes buttons for 'Enable Field Editing', 'Add Chart', and 'Edit'. The report shows 'Total Records: 13'. The table below lists the records with columns: Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date.

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Automated Process	Sample Account for Entitlements	-	-	-	21/03/2023
2	-	Saraswathi R	GenePoint	CA	Customer - Channel	Cold	21/03/2023
3	-	Saraswathi R	United Oil & Gas, UK	UK	Customer - Direct	-	21/03/2023
4	-	Saraswathi R	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	21/03/2023
5	-	Saraswathi R	Edge Communications	TX	Customer - Direct	Hot	21/03/2023
6	-	Saraswathi R	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	21/03/2023
7	-	Saraswathi R	Pyramid Construction Inc.	-	Customer - Channel	-	21/03/2023
8	-	Saraswathi R	Dickenson plc	KS	Customer - Channel	-	21/03/2023
9	-	Saraswathi R	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	21/03/2023
10	-	Saraswathi R	Express Logistics and Transport	OR	Customer - Channel	Cold	21/03/2023
11	-	Saraswathi R	University of Arizona	AZ	Customer - Direct	Warm	21/03/2023
12	-	Saraswathi R	United Oil & Gas Corp.	NY	Customer - Direct	Hot	21/03/2023
13	-	Saraswathi R	sForce	CA	-	-	21/03/2023

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.,