

BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

INTRODUCTION .

OVERVIEW :

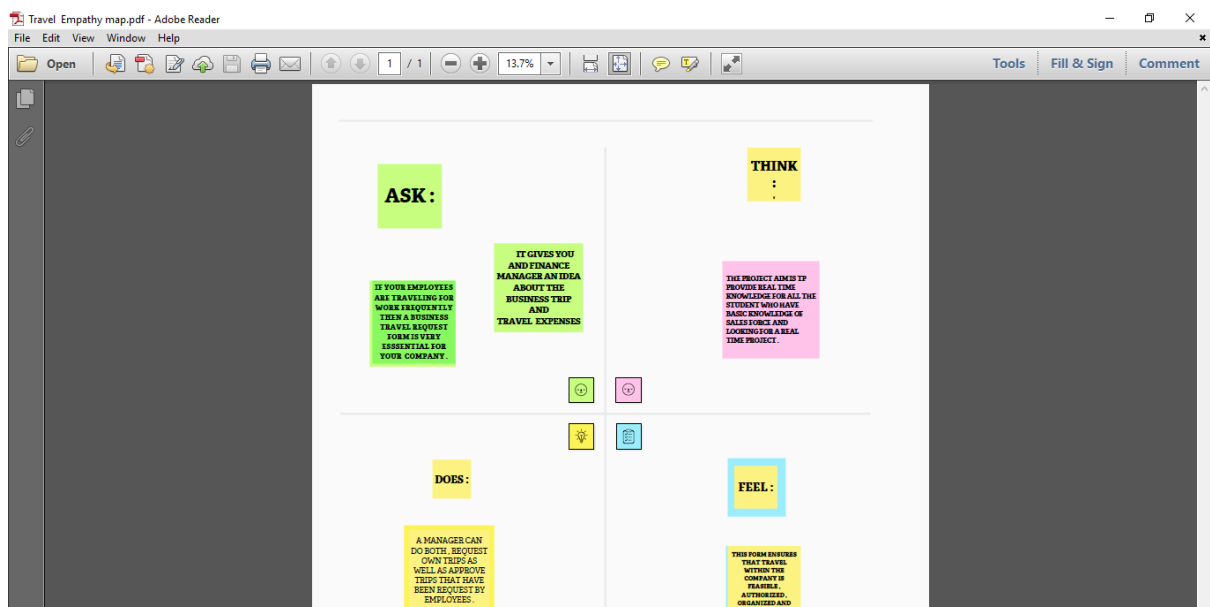
This project helps in sending your travel approval requests to your manager in place of emails .

PURPOSE :

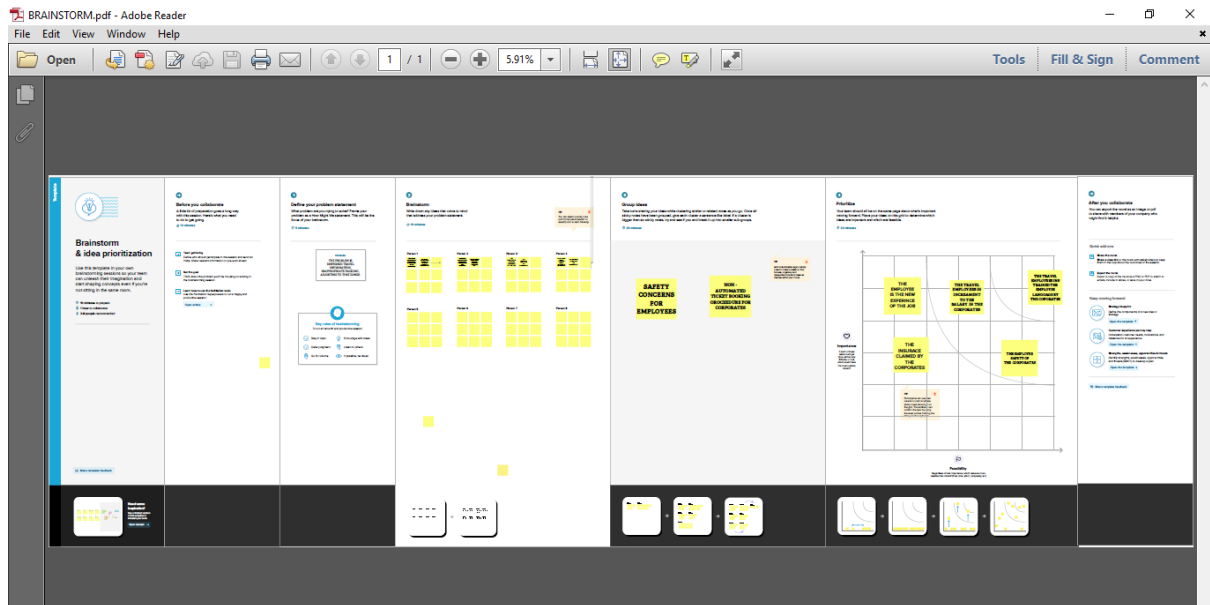
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Sales force and Looking for a real-time project. This project will also help to those professionals who are in cross-technology and wanted to switch to Sales force with the help of this project they will gain knowledge and can include into their resume as well.

PROBLEM DEFINITION AND & DESIGN THINKING

EMPATHY MAP :



IDEATION & BRAINSTORMING MAP :



RESULT :

DATA MODEL :

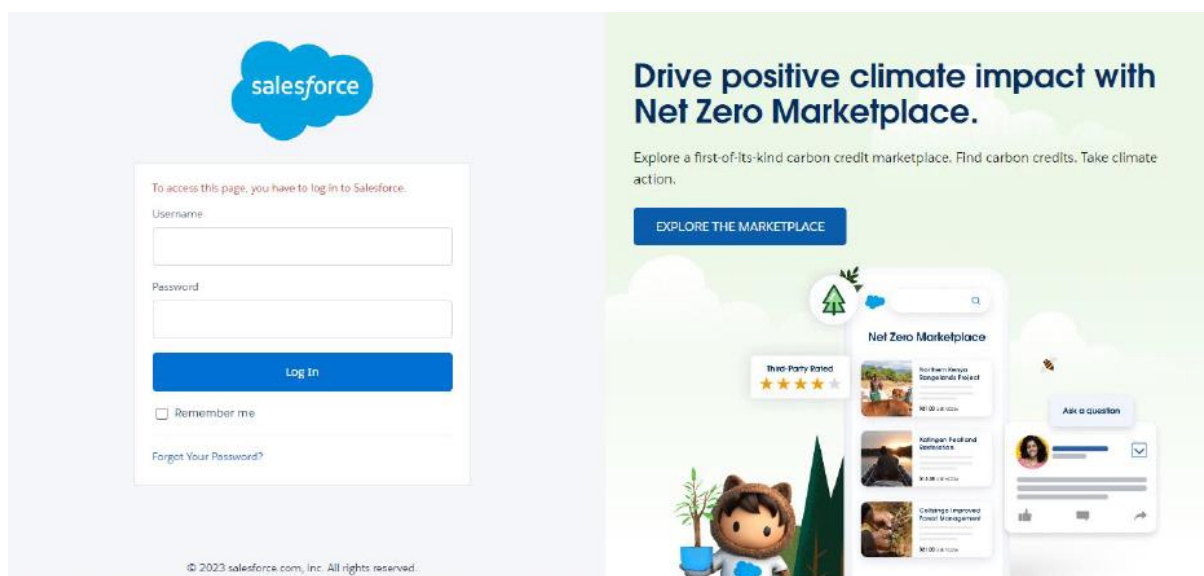
OBJECT NAME	FIELDS IN THE OBJECTS	
OBJ - 1	FIELD LABEL	DATA TYPE
	Travel Approval	Text
	Department	Text
OBJ - 2	FIELD LABEL	DATA TYPE
	Expenses Idem	Text

ACTIVITY & SCREENSHOT :

MILESTONE - 1

Login To Your Sales force Account

1. Go to developers.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



MILESTONE - 2

Create the Travel Application

Search App Manager 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>

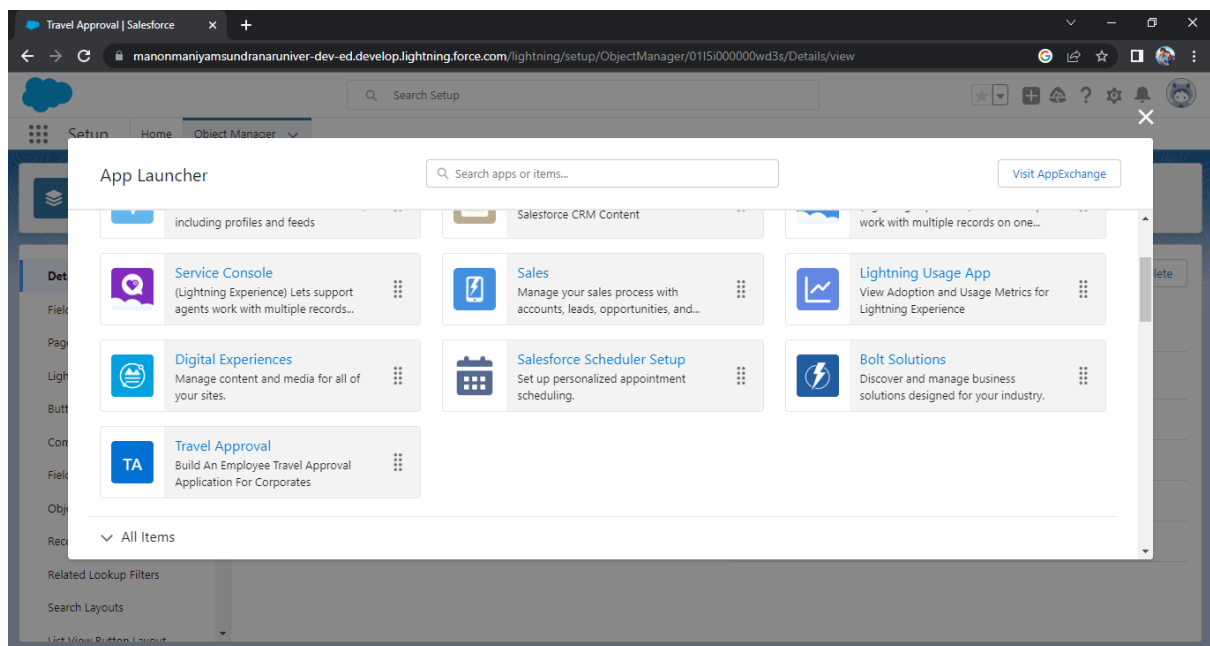
Steps

- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter Travel Approval as the App Name, then click Next .● Under App Options, leave the default selections and click Next.

- Under Utility Items, leave as is and click Next.
- From Available Items, select Department, Travel Approval, Expense Item, Reports, and Dashboards and move them to Selected Items. Click Next.

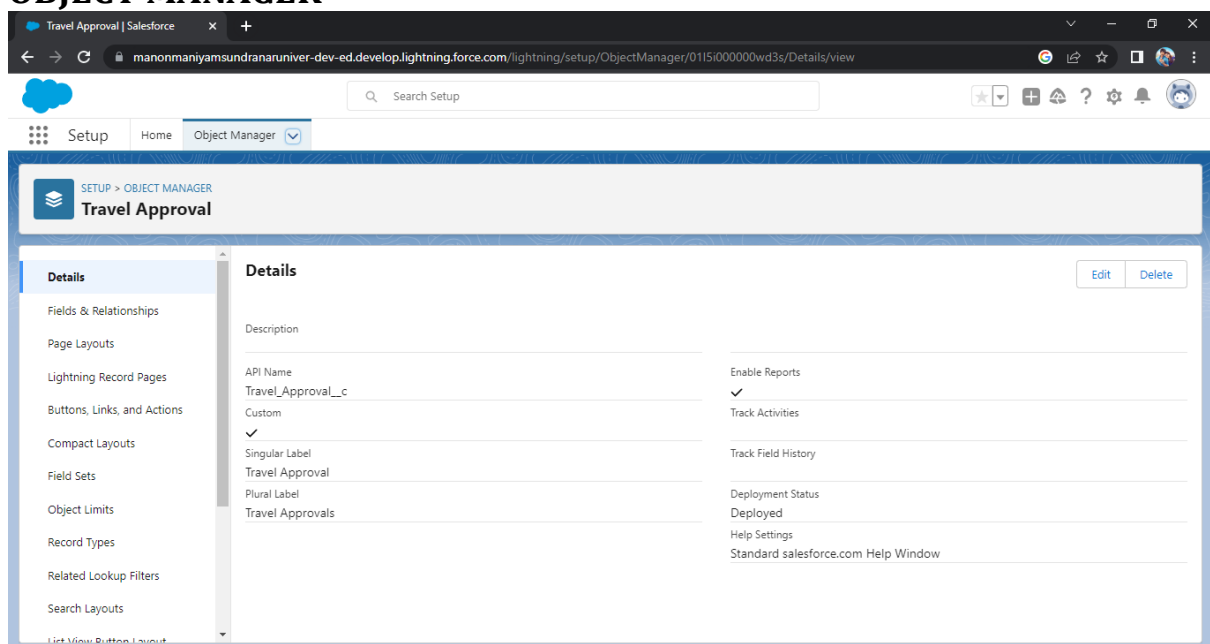
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

- To verify your changes, click the App Launcher, type Travel Approval and select the travel approval app .



MILESTONE - 3

OBJECT MANAGER



MILESTONE -4

TAB :

The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar contains a search bar with 'TAB' and a list of options under 'User Interface': 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs' (which is selected). The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a descriptive paragraph about custom tabs. The interface is divided into three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section contains a table with three rows of tabs: 'Departments' (Box style), 'Expansion Items' (Alarm clock style), and 'Travel Approvals' (Car style). Each row has 'Edit' and 'Del' links. The 'Web Tabs' section shows 'No Web Tabs have been defined'. The 'Visualforce Tabs' section is currently empty.

Action	Label	Tab Style	Description
Edit Del	Departments	Box	
Edit Del	Expansion Items	Alarm clock	
Edit Del	Travel Approvals	Car	

MILESTONE - 5

CREATE FIELDS & RELATIONSHIP :

This screenshot is identical to the one above, showing the Salesforce Setup interface for Custom Tabs. It displays the same sidebar with 'TAB' search and 'User Interface' options, the 'Custom Tabs' main heading, and the three sections: 'Custom Object Tabs' (with a table of three tabs: 'Departments', 'Expansion Items', and 'Travel Approvals'), 'Web Tabs' (empty), and 'Visualforce Tabs' (empty).

MILESTONE – 6

IMPORT DEPARTMENT :

From Setup, click the Home tab.

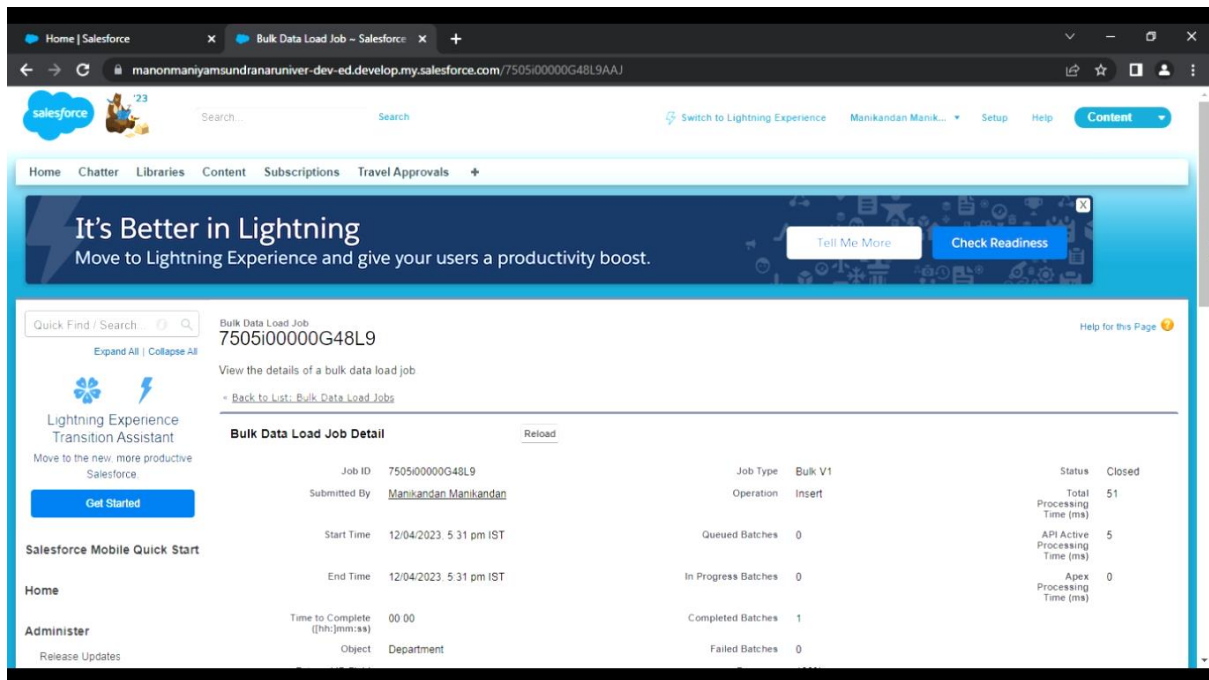
1. In the Quick Find box, enter Data Import and select Data Import Wizard.

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



MILESTONE -7

USER :

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 instructions

- 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

The screenshot shows the Salesforce 'User Edit' page for a user named 'Manikandan Manikandan'. The page is divided into two main sections: 'General Information' and 'Role'. The 'General Information' section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' section includes fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. The 'Role' dropdown is set to '<None Specified>'. The 'User License' is 'Salesforce'. The 'Profile' is 'System Administrator'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is checked. The 'Offline User' checkbox is checked. The 'Knowledge User' checkbox is checked. The 'Flow User' checkbox is checked. The 'Service Cloud User' checkbox is checked. The 'Site.com Contributor User' checkbox is checked. The 'Site.com Publisher User' checkbox is checked. The 'WDC User' checkbox is checked.

MILESTONE – 8

Customize Travel Approval Object Page layout

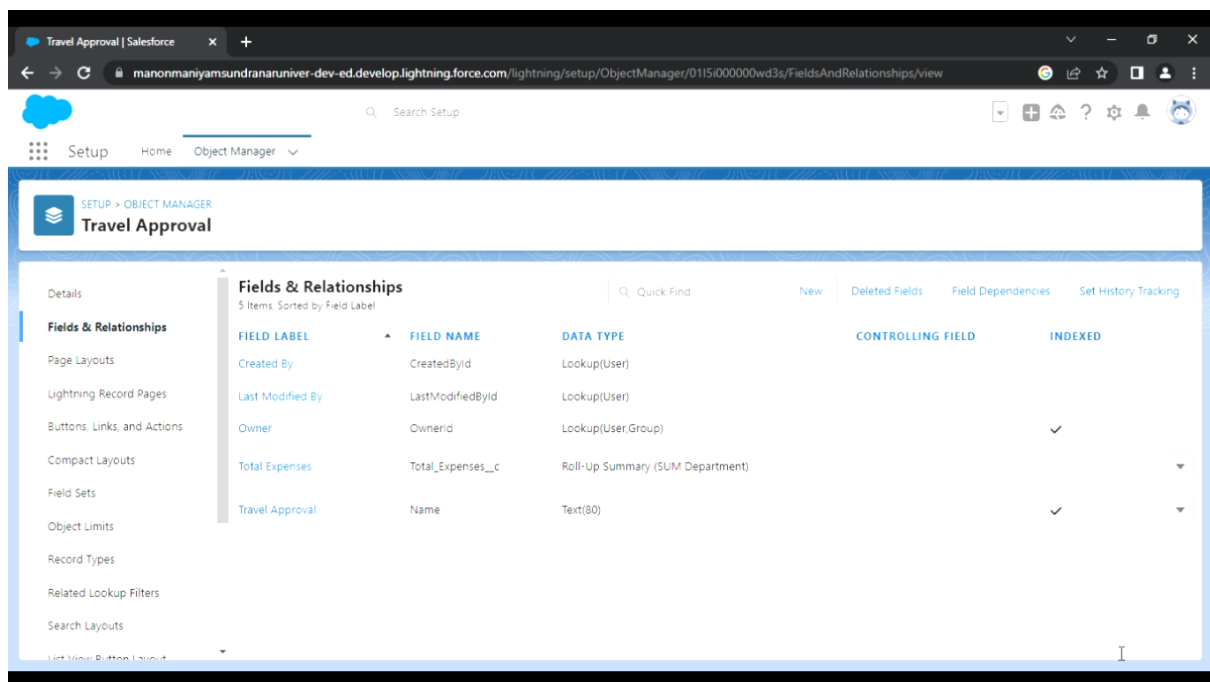
1. From the Object Manager, search for the travel approval object and click on page layouts and click edit.

The screenshot shows the Salesforce 'Object Manager' page for the 'Travel Approval' object. The page is divided into two main sections: 'Details' and 'Page Layouts'. The 'Details' section includes fields for Fields, Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The 'Page Layouts' section includes a 'Quick Find' field and a list of page layouts. The 'Page Layouts' section is currently selected, showing a list of page layouts for the 'Travel Approval' object. The 'Page Layouts' section includes a 'Quick Find' field and a list of page layouts. The 'Page Layouts' section is currently selected, showing a list of page layouts for the 'Travel Approval' object. The 'Page Layouts' section includes a 'Quick Find' field and a list of page layouts. The 'Page Layouts' section is currently selected, showing a list of page layouts for the 'Travel Approval' object.

MILESTONE – 9

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.



MILESTONE – 10

Add Report

To create a report:

Go to the app → click on the reports tab

Click New Report

Report Builder | Salesforce

manonmantiamsundranaruniver-dev-ed.develop.lightning.force.com/lightning/r/Report/0005i000007LIB4EAK/edit

Search...

Travel Approval Accounts Contacts Travel Approvals Departments Expansion Items Reports

REPORT Travel Report Accounts Save & Run Save Close Run

Outline Filters 2 Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Manikandan Manikandan Travel Approval (INDIA)	-	-	-	12/04/2023
2	-	Manikandan Manikandan GenePoint	CA	Customer - Channel	Cold	11/04/2023
3	-	Manikandan Manikandan United Oil & Gas, UK	UK	Customer - Direct	-	11/04/2023
4	-	Manikandan Manikandan United Oil & Gas, Singapore	Singapore	Customer - Direct	-	11/04/2023
5	-	Manikandan Manikandan Edge Communications	TX	Customer - Direct	Hot	11/04/2023
6	-	Manikandan Manikandan Burlington Textiles Corp of America	NC	Customer - Direct	Warm	11/04/2023
7	-	Manikandan Manikandan Pyramid Construction Inc.	-	Customer - Channel	-	11/04/2023
8	-	Manikandan Manikandan Dickenson plc	KS	Customer - Channel	-	11/04/2023
9	-	Manikandan Manikandan Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	11/04/2023
10	-	Manikandan Manikandan Express Logistics and Transport	OR	Customer - Channel	Cold	11/04/2023
11	-	Manikandan Manikandan University of Arizona	AZ	Customer - Direct	Warm	11/04/2023
12	-	Manikandan Manikandan United Oil & Gas Corp.	NY	Customer - Direct	Hot	11/04/2023
13	-	Manikandan Manikandan sforce	CA	-	-	11/04/2023

Recent Items

MILESTONE – 11

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.

Last Activity	Account Owner	Account Name	Billing State/Province	Type
	Manikandan Manikandan	Travel Approval (INDIA)	-	-
	Manikandan Manikandan	GenePoint	CA	Customer - Channel
	Manikandan Manikandan	United Oil & Gas, UK	UK	Customer - Direct
	Manikandan Manikandan	United Oil & Gas, Singapore	Singapore	Customer - Direct
	Manikandan Manikandan	Edge Communications	TX	Customer - Direct
	Manikandan Manikandan	Burlington Textiles Corp of America	NC	Customer - Direct
	Manikandan Manikandan	Pyramid Construction Inc.	-	Customer - Channel
	Manikandan Manikandan	Dickenson plc	KS	Customer - Channel
	Manikandan Manikandan	Grand Hotels & Resorts Ltd	IL	Customer - Direct
	Manikandan Manikandan	Express Logistics and Transport	OR	Customer - Channel
	Manikandan Manikandan	University of Arizona	AZ	Customer - Direct
	Manikandan Manikandan	United Oil & Gas Corp.	NY	Customer - Direct
	Manikandan Manikandan	sForce	CA	-

TRAILHEAD PROFILE PUBLIC & URL

TEAM LEADER - <https://trailblazer.me/id/manidev7>

TEAM MEM 1 - <https://trailblazer.me/id/mmalini7>

TEAM MEM 2 - <https://trailblazer.me/id/kkakila>

TEAM MEM 3 - <https://trailblazer.me/id/gmanju21>

ADVANDAGE & DISADVANDAGE

ADVANDAGE :

- You maintain complete control and direction of all work .
- Exclusivity can be demanded .
- Few limitations on what projects or tasks you can assign.
- Few restrictions on terminating employment .
- Build loyalty to the business .

DISADVANDAGE :

- Payroll tax requirements .
- Cover payroll , no matter what ?
- Business is responsible for training and licensing .

APPLICATIONS :

The travel support system (TSS) is small sample application for natural one . As a sample application , its focus is to show natural one functionality rather than being a full - fledged travel support application .

CONCLUSION :

Employee travel on business trips to attend conferences , perform research , scout potential locations , meet suppliers , visit clients and for numerous other essential reasons .

FUTURE SCOPE :

In the longer term , we expect salesforce to integrate data science and big data capabilities to its service cloud and marketing cloud .