

Build A Employee Travel Approval Application For Corporates

**NAAN MUDHALVAN
PROJECT REPORT**

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TABLE OF CONTENTS

Chapter No	Title	Page No
	LIST OF FIGURES	5
	LIST OF ABBREVIATION	6
1.	PROJECT SPECIFICATION	7
	1.1 Project Goal	7
	1.2 Project Scope	8
	1.3 Problem Statement Definition	9
	1.4 Empathy Map Canvas	10
	1.5 Ideation & Brainstorming	11
	1.6 Proposed Solution	14
	1.7 Functional & Technical Requirements	16
	1.8 Project Road Map	19
2	PREPARATION DATA MODELING	23
	2.1 Salesforce Developer Org	23
	2.2 Custom Object Creation & Tabs	25
	2.3 Lightning App	29
	2.4 Relationship between Objects	31
	2.5 Customize User Interface	33
	2.6 Business Logic	37
3.	Users & Data Security	38
	3.1 User Creation & Setup Approvals	38
4.	Automation	40
	4.1 Flow	40
	4.2 Approval Process	42
5.	Reports & Dashboard	48
	5.1 Reports	48
	5.2 Dashboard	50
6.	Conclusion	51
7.	Project Demonstration	52
	Github & Project Video Demo Link	52

LIST OF FIGURES

Figure No	Name Of Figure	Page No
1.8.1	Data Flow Diagram	19
1.8.2	Technical Architecture	20

LIST OF ABBREVIATION

CRM	Customer Relationship Management
ESP	Email Service Provider
UI	User Interface
UX	User Experience
OWD	Org - Wide Default
CTA	Call To Action
CSV	Comma - Separated Values
SLA	Service Level Agreement
API	Application Programming Interface
SaaS	Software as a Service
PaaS	Platform as a Service

CHAPTER-1

PROJECT SPECIFICATION

Project Goal

Building an Employee Travel Approval Application for corporate use within the Salesforce platform involves a multi-faceted approach, starting with requirements gathering to define user roles and workflows. A well-structured data model captures essential information, and user-friendly interfaces for both employees and managers streamline the travel request and approval process. Workflow automation facilitates efficient routing and notifications, while integrations with external systems like expense management tools enhance data accuracy.

Robust reporting and analytics tools offer insights, and mobile app development ensures accessibility on-the-go. Security and compliance measures safeguard sensitive data, and thorough testing ensures a reliable application. Training and documentation support user adoption, and ongoing maintenance and improvements address evolving needs. Scalability planning and future enhancements cater to growing demands, while comprehensive documentation maintains transparency, ultimately streamlining the travel approval process and enhancing efficiency.

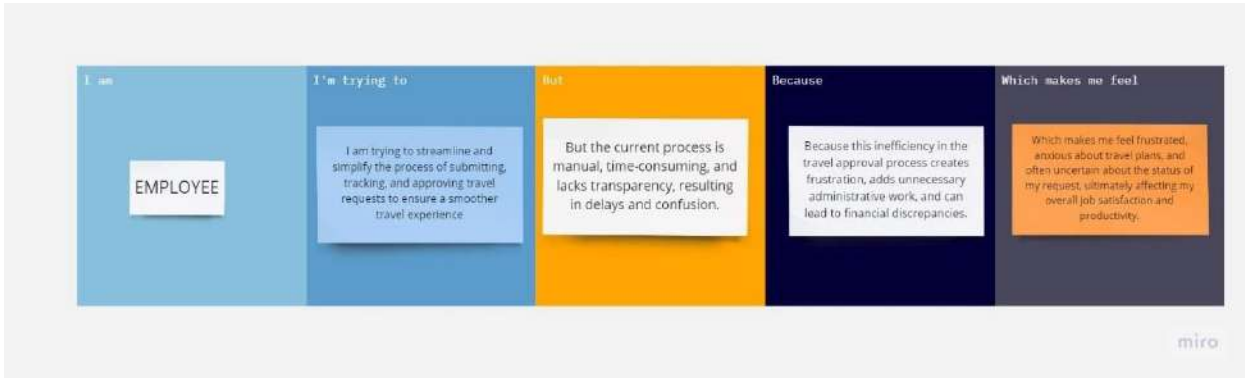
Project Scope

The Employee Travel Approval Application built in Salesforce serves a vital purpose in corporate travel management. Firstly, it streamlines and automates the often complex and time-consuming travel request and approval process. This efficiency results in reduced administrative burdens, faster approval times, and improved communication between employees and managers. With the ability to centralize all travel-related data, the application ensures data accuracy and compliance with corporate policies and regulatory requirements, contributing to better financial management and accountability.

The application fosters transparency throughout the travel approval workflow. Both employees and managers can easily track the status of travel requests, which enhances visibility into the process. By providing a clear overview of approval progress, it minimizes potential delays and miscommunication, ultimately improving the user experience and helping employees plan their travel more effectively.

The Employee Travel Approval Application in Salesforce offers robust security, ensuring that sensitive data is protected while also providing scalability for future growth. The built-in reporting and analytics tools offer insights into travel expenses and approval metrics, supporting data-driven decision-making. By facilitating on-the-go access through mobile app development, the application empowers employees and managers to manage travel efficiently and enhances the organization's overall travel management capabilities. In conclusion, the application optimizes corporate travel management by enhancing efficiency, transparency, and control, ultimately leading to cost savings and a more seamless user experience.

Problem Statement Definition

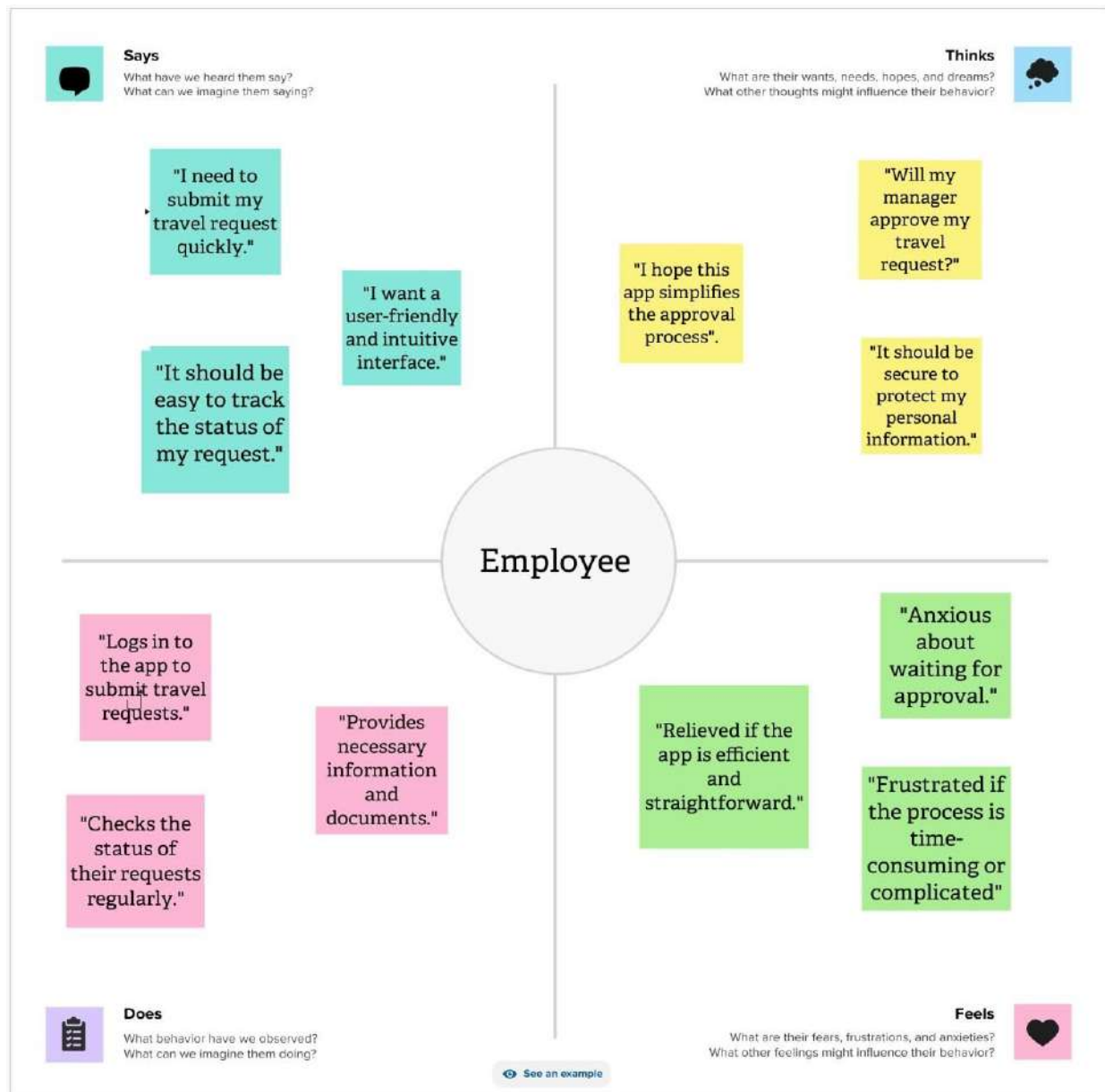


Problem Statement (PS)	I am (Employee)	I’m trying to	But	Because	Which makes me feel
PS	Employee	I am trying to streamline and simplify the process of submitting, tracking, and approving travel requests to ensure a smoother travel experience	But the current process is manual, time-consuming, and lacks transparency , resulting in delays and confusion.	Because this inefficiency in the travel approval process creates frustration, adds unnecessary administrative work, and can lead to financial discrepancies	Which makes me feel frustrated, anxious about travel plans, and often uncertain about the status of my request, ultimately affecting my overall job satisfaction and productivity

Empathy Map Canvas

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

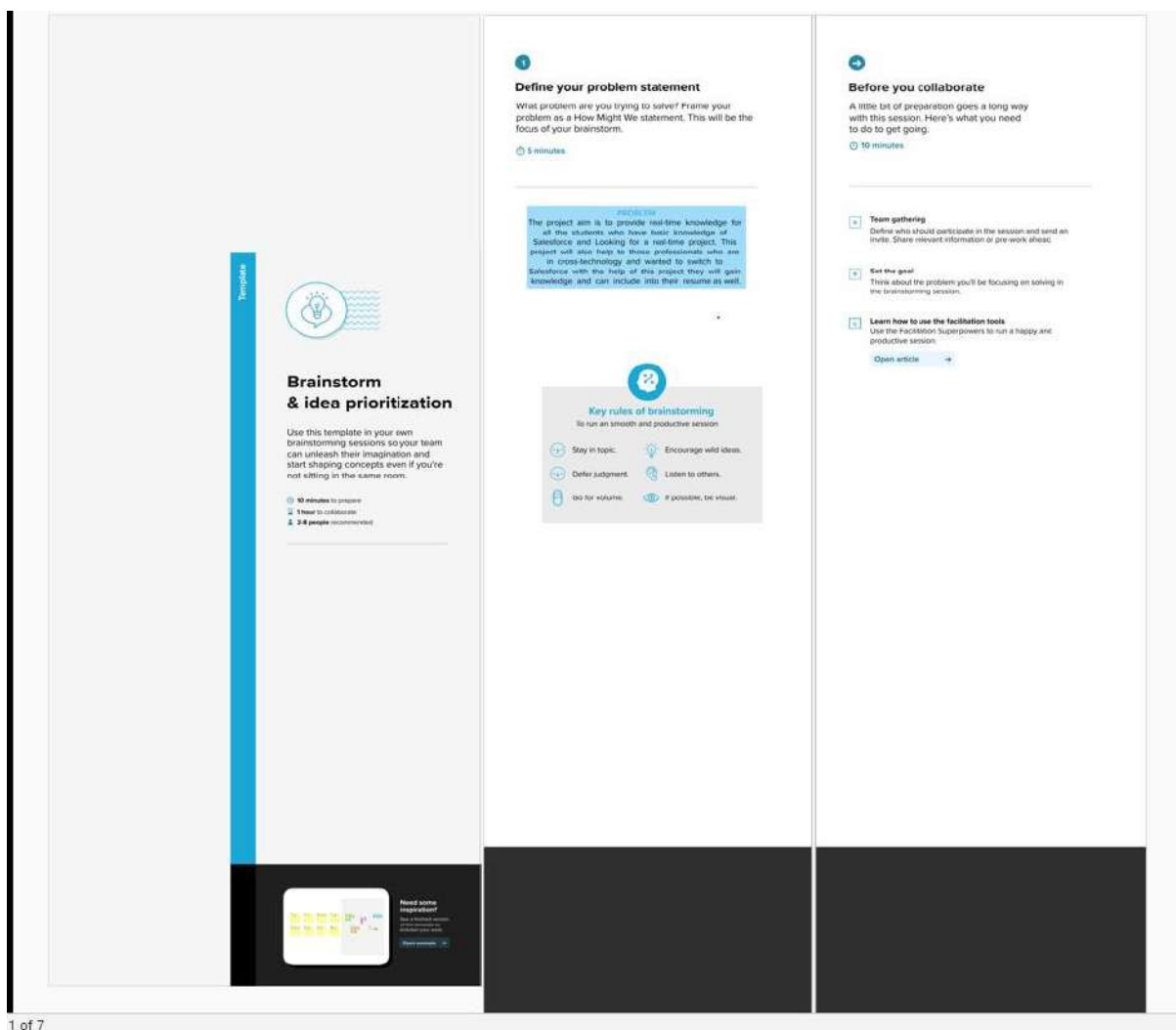
It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.



Ideation & Brainstorming

Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.

Step-1: Team Gathering, Collaboration and Select the Problem Statement:



Step-2: Brainstorm, Idea Listing and Grouping:

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

10 minutes

TP
You can select a sticky note and in the panel (switch to) switch to view the next drawing!

Person 1

User-Friendly Dashboard: Create an intuitive dashboard for employees to submit travel requests and track their status.

Manager Approval Workflow: Implement a workflow that allows managers to review and approve travel requests easily.

Person 2

Travel Policy Integration: Include the company's travel policy within the app ensuring employees are aware of guidelines and restrictions.

Expense Management: Allow employees to submit expense reports related to their trips and attach receipts.

Person 3

1. Notification System: Implement a notification system to keep employees informed about the status of their travel requests.

1. Notification System: Implement a notification system to keep employees informed about the status of their travel requests.

Person 4

Real-Time Currency Conversion: Provide a currency conversion feature to help employees manage expenses in different currencies.

Analytics and Reporting: Generate reports for corporate administrators to analyze travel patterns and expenses.

3

Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

20 minutes

TP
Add customer name tags to sticky notes to make it easier to find names, corporate, and categorize important ideas as they're added (your friend).

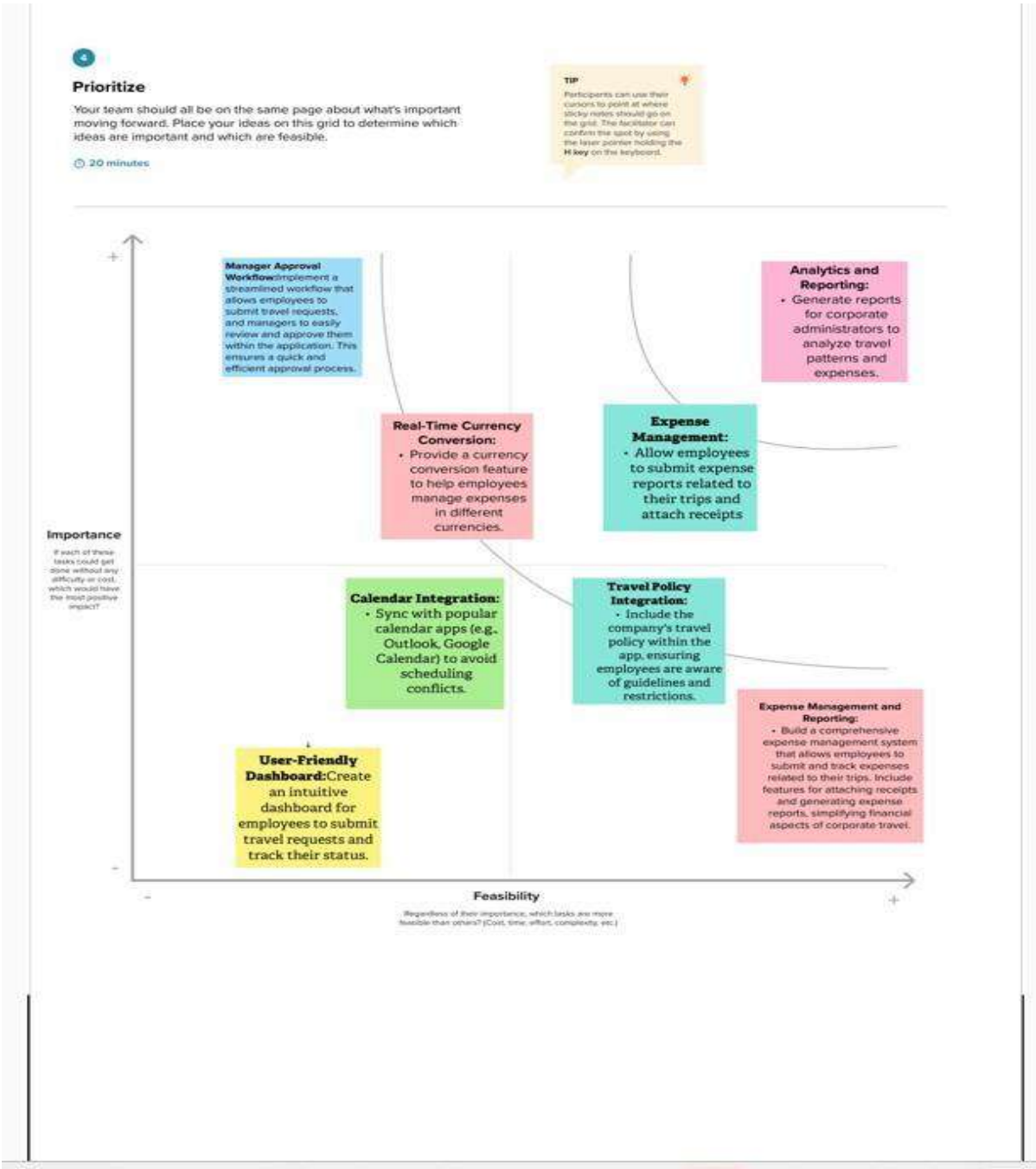
Manager Approval Workflow: Implement a streamlined workflow that allows employees to submit travel requests, and managers to easily review and approve them within the application. This ensures a quick and efficient approval process.

Expense Management and Reporting: Build a comprehensive expense management system that allows employees to submit and track expenses related to their trips. Include features for attaching receipts and generating expense reports, simplifying financial aspects of corporate travel.

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Step-3: Idea Prioritization:



Proposed Solution

S. No	Parameter	Description
1.	Problem Statement (Problem to be solved)	Corporates often grapple with inefficient and manual travel approval processes that involve paperwork and a lack of transparency. These outdated methods lead to delays, increased administrative work, and potential compliance issues. The process is a source of stress for employees who require timely approvals to plan their business trips effectively, and it leaves them dissatisfied with the process. Managers, on the other hand, struggle to review and manage a high volume of travel requests while ensuring compliance. The absence of transparency leads to bottlenecks and a lack of visibility, leaving them overwhelmed and frustrated.
2.	Idea / Solution description	Our proposed solution is to develop an Employee Travel Approval Application within Salesforce, offering automation and centralization. The application will provide a user-friendly and automated system that allows employees to submit travel requests seamlessly. Managers will be able to review and approve them efficiently, while the system offers real-time tracking of request statuses. It will also include integration with external systems for expense management, robust security measures, mobile accessibility and analytics tools for data-driven decision-making. The benefits include reduced administrative burdens, improved communication, cost control, and better compliance with corporate policies and regulations.

3.	Novelty / Uniqueness	What sets our solution apart is the innovative use of Salesforce, a highly customizable and powerful platform, to streamline corporate travel management. The automation of approval workflows and integration with external systems will significantly reduce manual work and errors. The mobile app component will provide users with the flexibility and convenience of on-the-go access. Furthermore, the incorporation of robust reporting and analytics tools will enable data-driven decision-making and offer insights into travel expenses, setting our solution apart from conventional methods.
4.	Social Impact / Customer Satisfaction	Our application will have a substantial social impact by enhancing the user experience in corporate travel management. Employees and managers will benefit from a smoother, more transparent, and efficient travel approval process, reducing frustration and uncertainty. The streamlined process will free up time and resources for more strategic tasks, thereby improving overall workforce productivity. Data-driven decision-making will lead to better cost management, making it easier to control expenses and ensuring financial compliance. The application will also guarantee compliance with corporate policies and regulatory requirements, reducing risks and ensuring data security. Lastly, by optimizing travel planning, our solution can contribute to a more sustainable approach to business travel, aligning with corporate sustainability goals.

Functional & Technical Requirements

Functional Requirements

FR No.	Functional Requirement (Epic)	Sub Requirement (Story / Sub-Task)
FR-1	User Management	<p>User Registration: Allow employees to register and log into the system.</p> <p>User Roles: Define roles (employees, managers, travel administrators) with different permissions.</p> <p>User Profiles: Capture and manage user profiles, including contact details.</p>
FR-2	Travel Request Submission	<p>Travel Request Form: Provide an intuitive form for employees to submit travel requests.</p> <p>Expense Entry: Allow users to enter estimated expenses, including flights, accommodation, meals, and incidentals.</p> <p>Travel Dates: Specify departure and return dates, including the option for flexible schedules.</p> <p>Attachments: Enable the attachment of supporting documents, such as itineraries or conference detail</p>
FR-3	Approval workflow	<p>Workflow Automation: Implement an automated approval process with defined workflows.</p> <p>Manager Assignment: Automatically route requests to the appropriate manager based on criteria like department or project.</p> <p>Notifications: Send notifications to managers and employees at various stages of the approval process.</p> <p>Delegation: Allow managers to delegate their approval authority when they are unavailable.</p>
FR-4	Approval Management	<p>Manager Dashboard: Provide managers with a dashboard to view and manage pending travel requests.</p> <p>Request Review: Allow managers to review travel details, expense estimates, and supporting documents.</p> <p>Approval/Rejection: Enable managers to approve or reject requests with comments.</p> <p>Escalation: Implement escalation processes for unattended requests or those exceeding certain thresholds</p>

FR-5	Expense Tracking	<p>Expense Tracking: Record actual expenses incurred during the trip.</p> <p>Receipt Upload: Allow users to upload expense receipts for verification.</p> <p>Expense Categories: Categorize expenses (e.g., transportation, lodging, meals) for reporting.</p> <p>Expense Reconciliation: Compare estimated and actual expenses for cost control.</p>
FR-6	Reporting and Analytics	<p>Reporting Tools: Develop custom reports and dashboards to monitor travel request status and expenses.</p> <p>Analytics: Implement data analytics for insights into travel patterns, expenses, and approval efficiency.</p> <p>Export: Allow users to export reports for offline use or sharing</p>

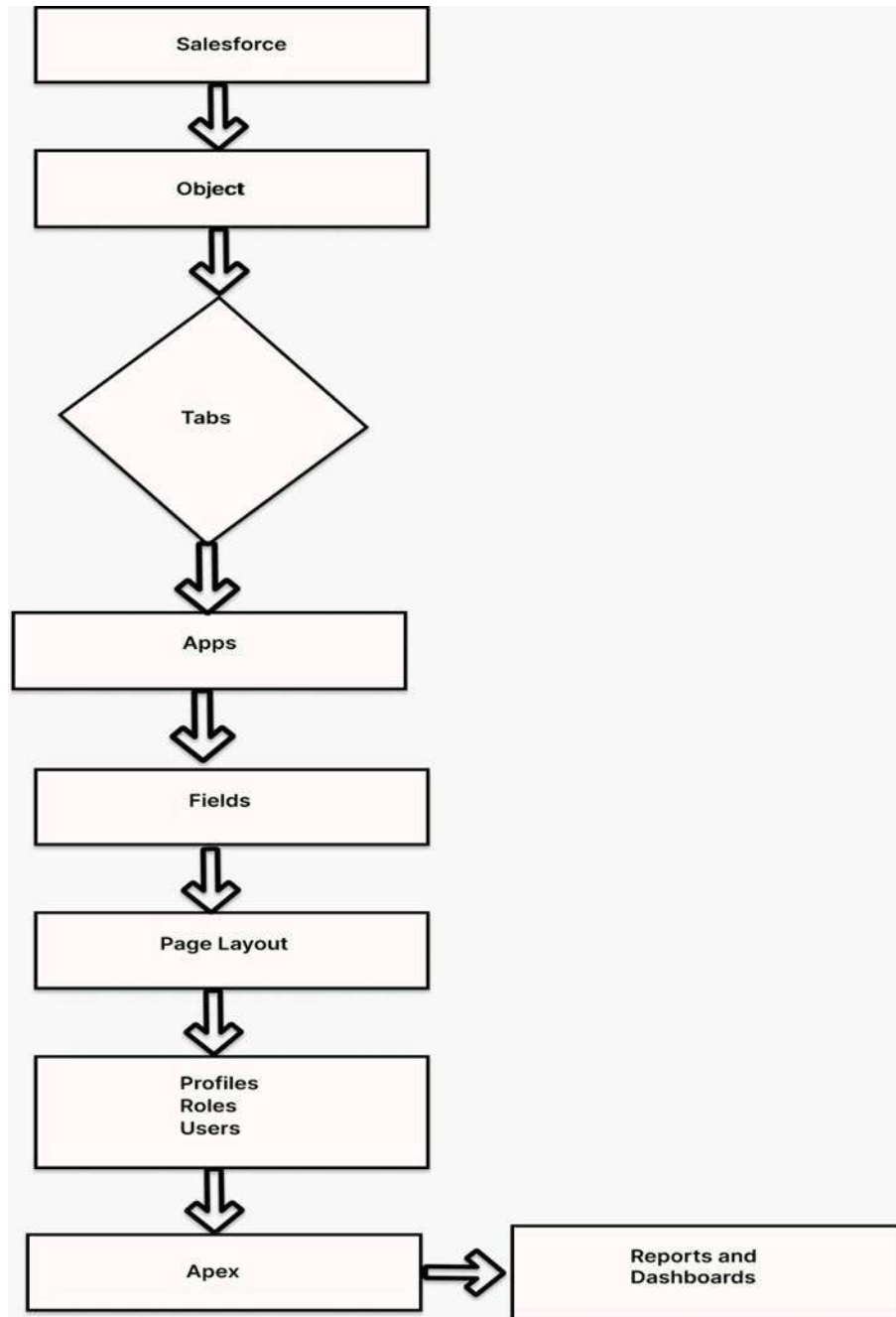
Technical Requirements

TR No.	Technical Requirement	Description
TR-1	Salesforce Environment	Utilize Salesforce's Enterprise or Unlimited edition to ensure scalability and access to advanced features.
TR-2	Development language	Develop using Salesforce's proprietary programming language, Apex, for server-side logic.
TR-3	Security	<ul style="list-style-type: none"> • Implement role-based access control (RBAC) to control who can access and modify data. • Encrypt sensitive data both in transit and at rest. • Utilize Salesforce Shield for enhanced security, including event monitoring and field-level encryption.
TR-4	Integration	<ul style="list-style-type: none"> • Use REST and SOAP APIs for integration with external systems, such as finance and expense management tools. • Implement Single Sign-On (SSO) solutions for seamless and secure access.
TR-5	Customization	Allow administrators to customize and configure the application, including approval workflows, fields, and user profiles.
TR-6	Mobile Accessibility	<ul style="list-style-type: none"> • Ensure that the application is accessible via the Salesforce mobile app for on-the-go request submission and tracking. • Develop a custom mobile app using Salesforce Mobile SDK for more tailored mobile functionality.

Project Road Map

Data Flow Diagram

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data enters and leaves the system, what changes the information, and where data is stored.



Technical Architecture

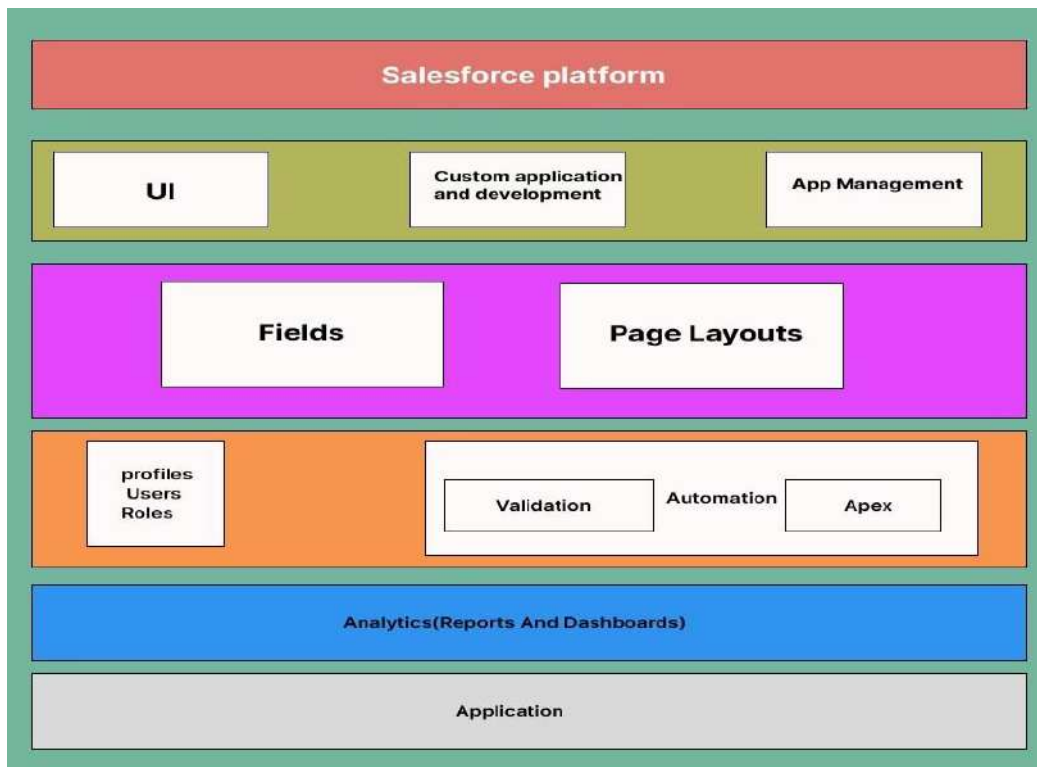


TABLE-1: Component and Technologies:

S.No	Component	Description	Technology
1.	User Interface	<p>Lightning Components: Use Salesforce Lightning components to design the user interface for employees, managers, and administrators.</p> <p>Custom Pages: Create custom Visualforce pages for more tailored and complex UI elements</p>	Salesforce
2.	Data Model	<p>Custom Objects: Define custom objects in Salesforce to represent entities like travel requests, expenses, and approvals.</p> <p>Master-Detail and Lookup Relationships: Establish relationships between objects to maintain data integrity.</p> <p>Custom Fields: Create custom fields to capture specific information, such as travel dates, expenses, and approval status.</p>	Salesforce

3.	Workflow Automation	<p>Approval Processes: Implement Salesforce Approval Processes to automate and streamline the travel request approval workflow.</p> <p>Process Builder and Flows: Use Process Builder and Flows to automate routine tasks and send notifications.</p>	Salesforce
4.	Reporting and Analytics	<p>Custom Reports: Create custom reports to track travel request status, expenses, and other relevant metrics.</p>	Salesforce
5.	Security	<p>Role-Based Access Control (RBAC): Configure RBAC to control who can access and modify data.</p> <p>Data Encryption: Encrypt sensitive data both in transit and at rest.</p> <p>Audit Trails: Maintain audit trails to log user activities for security and compliance purposes.</p>	Salesforce
6.	Salesforce Development	<p>Apex: Use Salesforce's proprietary programming language, Apex, for server-side logic and data manipulation.</p> <p>Visualforce: Develop custom user interfaces with Visualforce pages and components.</p> <p>Lightning Web Components: Create modern, component-based UIs using Lightning Web Components for a more responsive and dynamic user experience</p>	Salesforce

Table-2: Application Characteristics:

S. No	Characteristics	Description	Technology
1.	Responsive Design	Implement responsive design to adapt to various screen sizes, ensuring a consistent and visually pleasing user experience.	salesforce
2.	Accessibility	Ensure that the application is accessible via multiple devices and browsers, catering to users on desktops, tablets, and mobile devices. This accessibility is crucial for users who need to make or approve travel requests while on the go.	salesforce
3.	User-friendly	The application should have an intuitive and user-friendly interface to make it easy for employees, managers, and administrators to navigate and use the system without extensive training.	Salesforce
4.	Scalability	The application should be able to scale with the growing number of users and data, accommodating increasing demands without significant performance degradation.	salesforce
5.	Performance	Ensure the application's performance meets or exceeds user expectations, with rapid response times for actions such as submitting requests or generating reports.	salesforce
6.	Reporting and Analytics	Enable users to generate custom reports and access analytics tools to gain insights into travel patterns, expenses, and approval efficiency.	salesforce

CHAPTER-2

PREPARATION DATA MODELING

Salesforce Developer Org

In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.

Developer Edition Signup | Salesforce

developer.salesforce.com/signup

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
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First Name* VIGNAYA

Last Name* G S

Email* 2k20it44@klot.ac.in

Role* Developer

Company* Knowledge Institute of Technology

Developer Edition Signup | Salesforce

developer.salesforce.com/signup

State/Province* Tamil Nadu

Postal Code* 637504

Username* sakthisaiu@klot.com

Your Username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations.

☒ I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement.

Yes, I would like to receive marketing communications regarding Salesforce products, services and events. I can unsubscribe at any time.

By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the Privacy Statement.

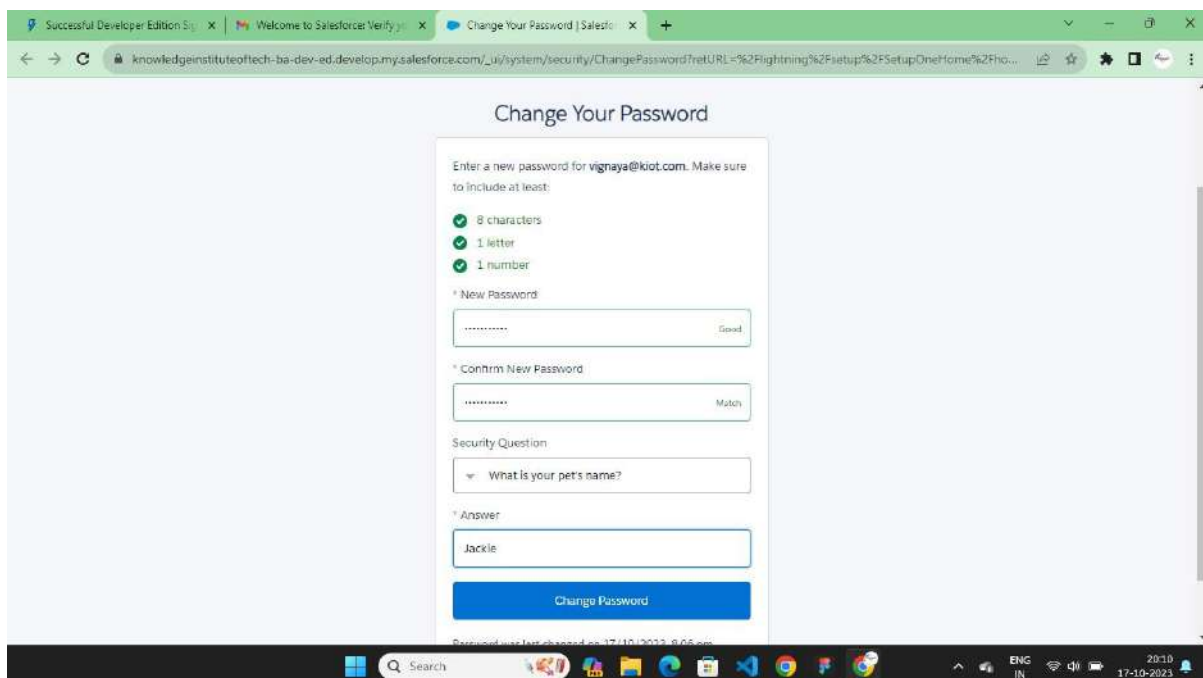
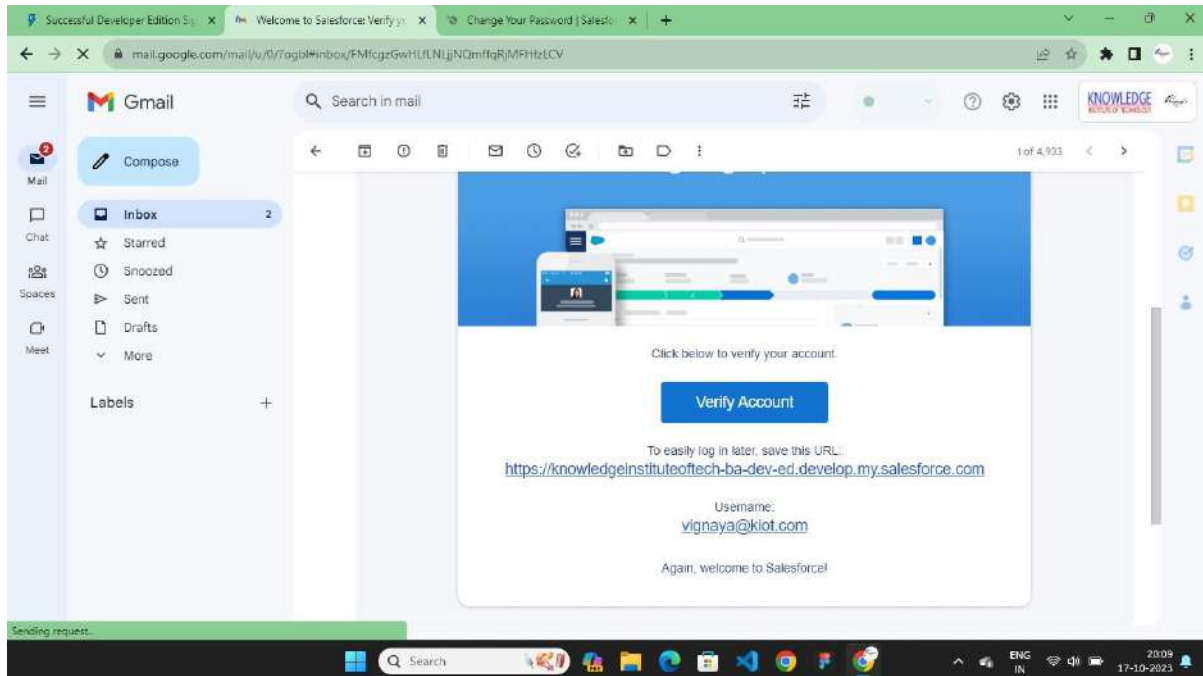
Keep boop processing

Already have a Salesforce Developer Environment?

Log in

Account Activation

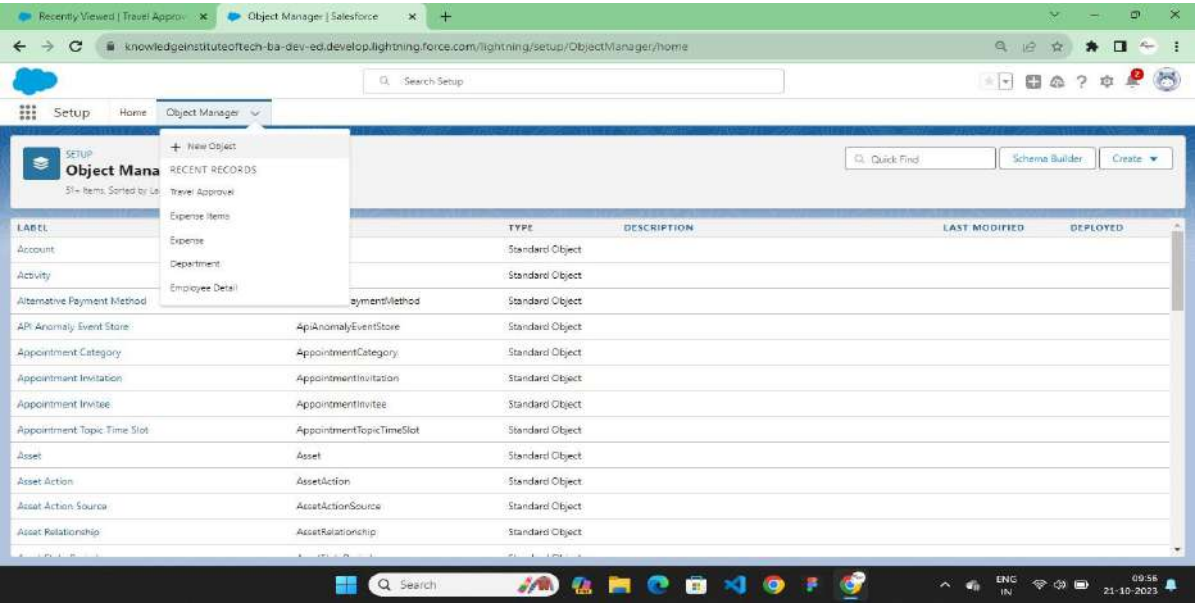
Activation tracks information about devices from which users have verified their identity.



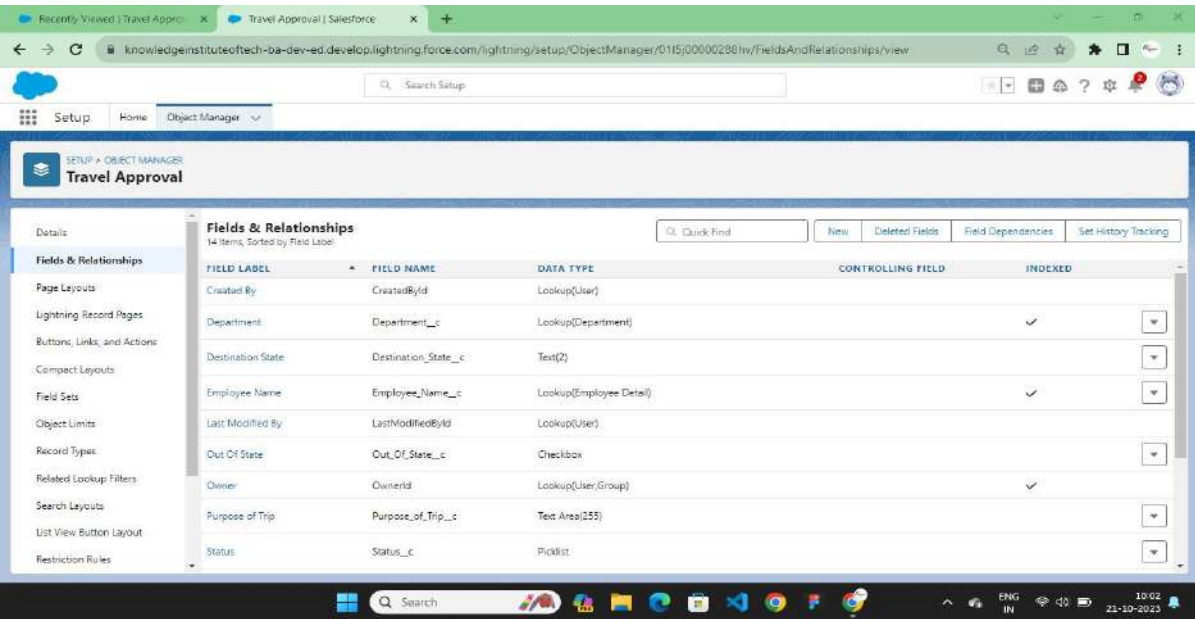
Custom Object Creation & Tabs

Custom Object Creation

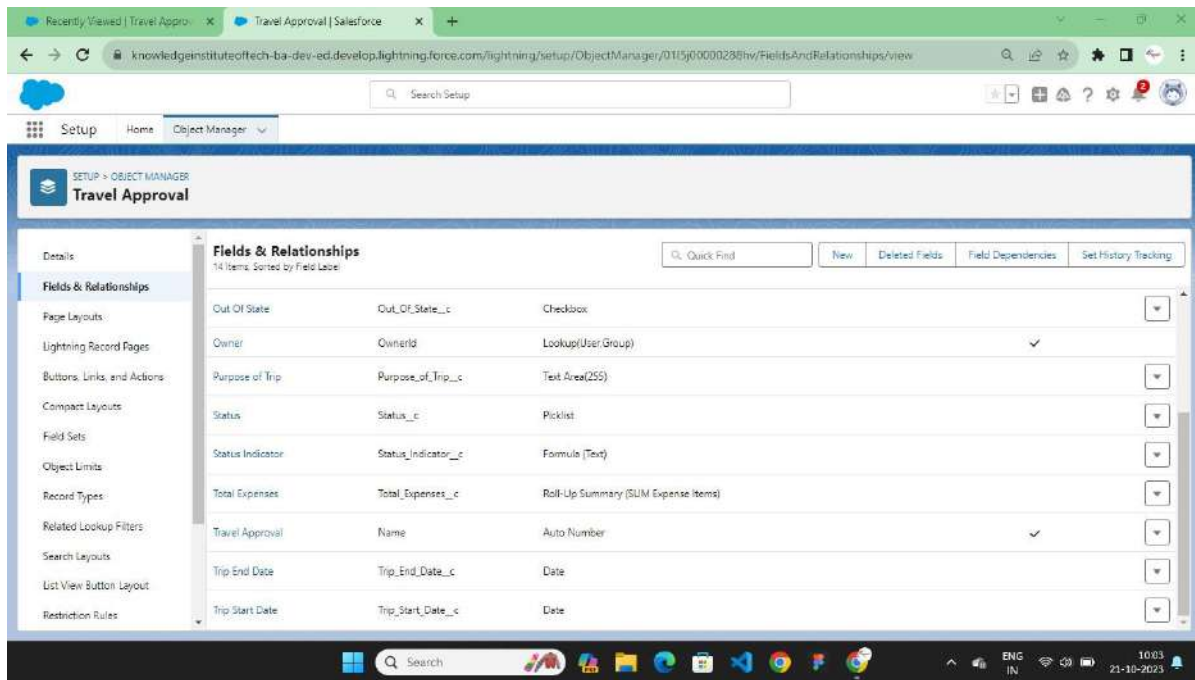
Objects are containers for your information, but they also give you special functionality. Custom objects are create to store information that’s specific to your company or industry. Custom Objects in Travel Approval App:



Fields in Travel Approval Object



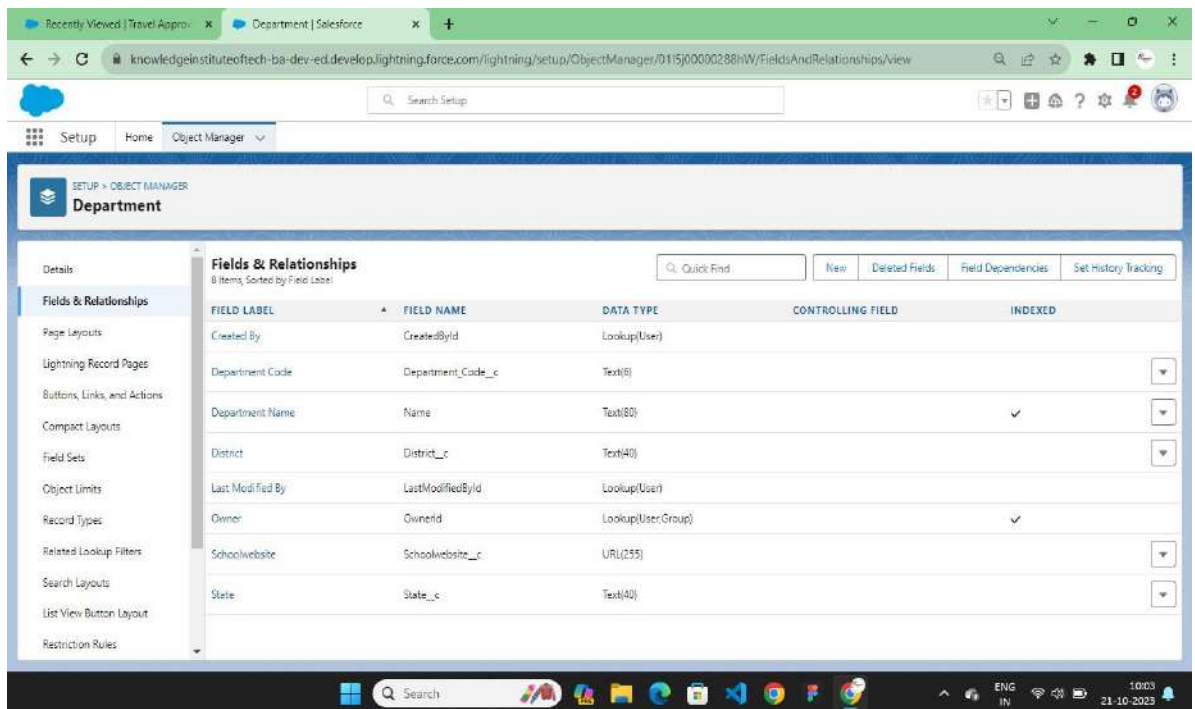
Build A Employee Travel Approval Application For Corporates



The screenshot shows the Salesforce Setup interface for the 'Travel Approval' object. The 'Fields & Relationships' tab is selected, displaying a list of 14 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

Field Label	Field Name	Data Type	Controlling Field	Indexed
Out Of State	Out_Of_State__c	Checkbox		
Owner	OwnerId	Lookup(User Group)		✓
Purpose of Trip	Purpose_of_Trip__c	Text Area(255)		
Status	Status__c	Picklist		
Status Indicator	Status_Indicator__c	Formula (Text)		
Total Expenses	Total_Expenses__c	Roll-Up Summary (SUM Expense Items)		
Travel Approval	Name	Auto Number		✓
Trip End Date	Trip_End_Date__c	Date		
Trip Start Date	Trip_Start_Date__c	Date		

Fields in Department Object



The screenshot shows the Salesforce Setup interface for the 'Department' object. The 'Fields & Relationships' tab is selected, displaying a list of 8 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

Field Label	Field Name	Data Type	Controlling Field	Indexed
Created By	CreatedById	Lookup(User)		
Department Code	Department_Code__c	Text(5)		
Department Name	Name	Text(80)		✓
District	District__c	Text(40)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
School Website	SchoolWebsite__c	URL(255)		
State	State__c	Text(40)		

Fields in Employee Detail Object

Recently Viewed | Travel Approv...Employee Detail | Salesforce

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j00000288hb/FieldsAndRelationships/view

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Employee Detail

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

List View Button Layout

Restriction Rules

Fields & Relationships

8 Items, Sorted by Field Label

Q, Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date of Birth	Date_of_Birth__c	Date		
Department	Department__c	Lookup(Department)		✓
Employee Id	Employee_Id__c	Text(12)		
Employee Name	Name	Text(80)		✓
Gender	Gender__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓

Search

ENG IN10:0321-10-2023

Fields in Expense Object

Recently Viewed | Travel Approv...Expense | Salesforce

knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j00000288hl/FieldsAndRelationships/view

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Expense

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

List View Button Layout

Restriction Rules

Fields & Relationships

6 Items, Sorted by Field Label

Q, Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Employee	Employee__c	Lookup(Employee Detail)		✓
Employee Detail	Employee_Detail__c	Lookup(Employee Detail)		✓
Expense	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓

Search

ENG IN10:0321-10-2023

Fields in Expense Items Object

The screenshot shows the Salesforce Setup interface for the 'Expense Items' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Expense Items Name	Name	Text(50)		✓
Expense Type	Expense_Type_c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Travel Approval	Travel_Approval_c	Master-Detail(Travel Approval)		✓

Tabs

Salesforce Tabs are like the menu options in a software application. They allow you to access specific functions, objects, or data.

The screenshot shows the Salesforce Setup interface for 'Custom Tabs'. The 'Custom Object Tabs' section is active, displaying a table of tabs. The table has columns for Action, Label, Tab Style, and Description. The tabs listed are:

Action	Label	Tab Style	Description
Edit Del	Departments	Winwash	
Edit Del	Employee Details	Winwash	
Edit Del	Expense Items	Winwash	
Edit Del	Expense	Winwash	
Edit Del	Travel Approvals	Winwash	

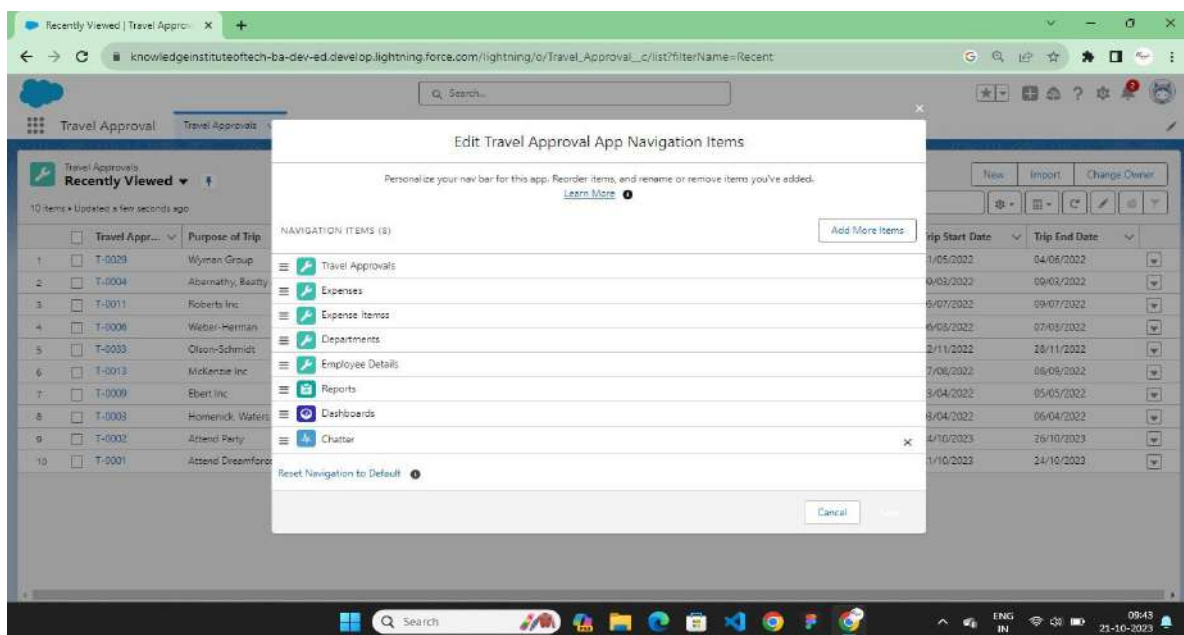
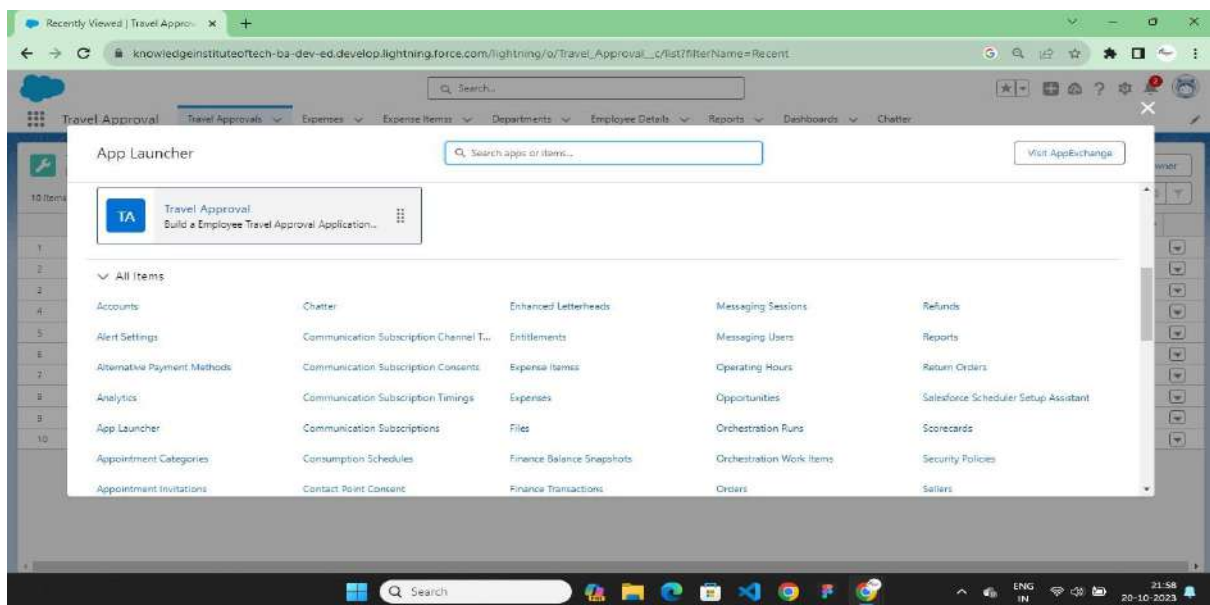
Below the table, there are sections for 'Web Tabs' and 'Visualforce Tabs', both of which are currently empty.

Lightning App

The Lightning App Builder is a point-and-click tool that makes it easy to create custom pages for the Salesforce mobile app and Lightning Experience, giving your users what they need all in one place.

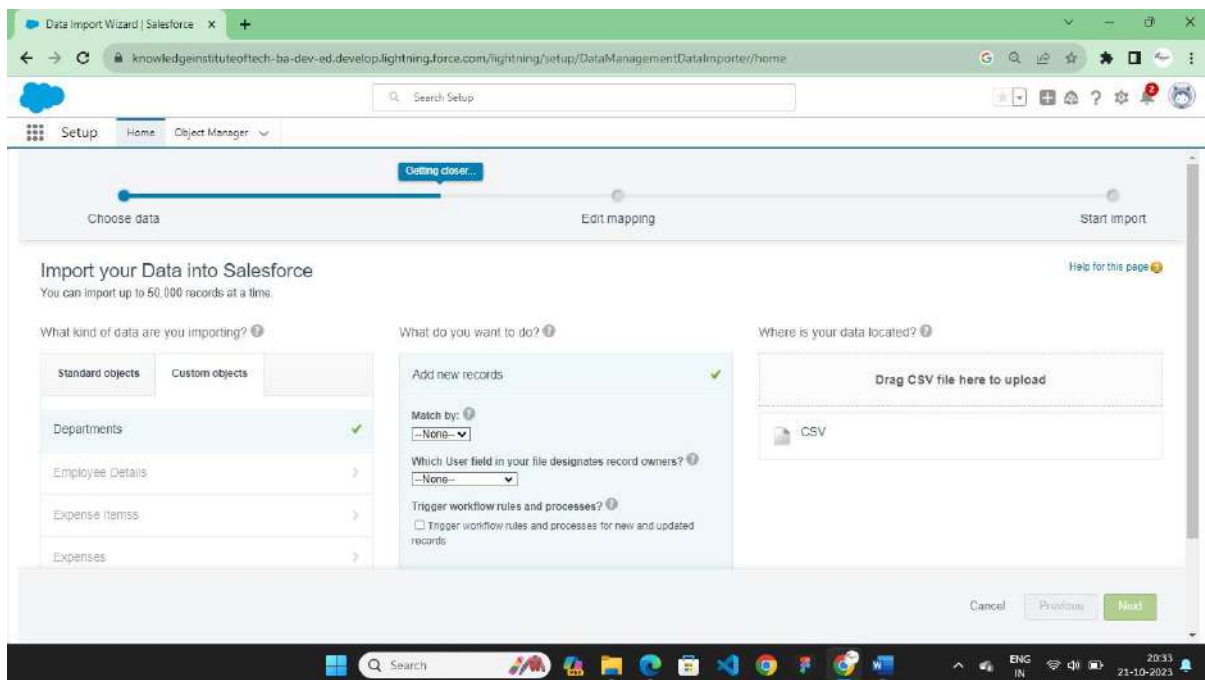
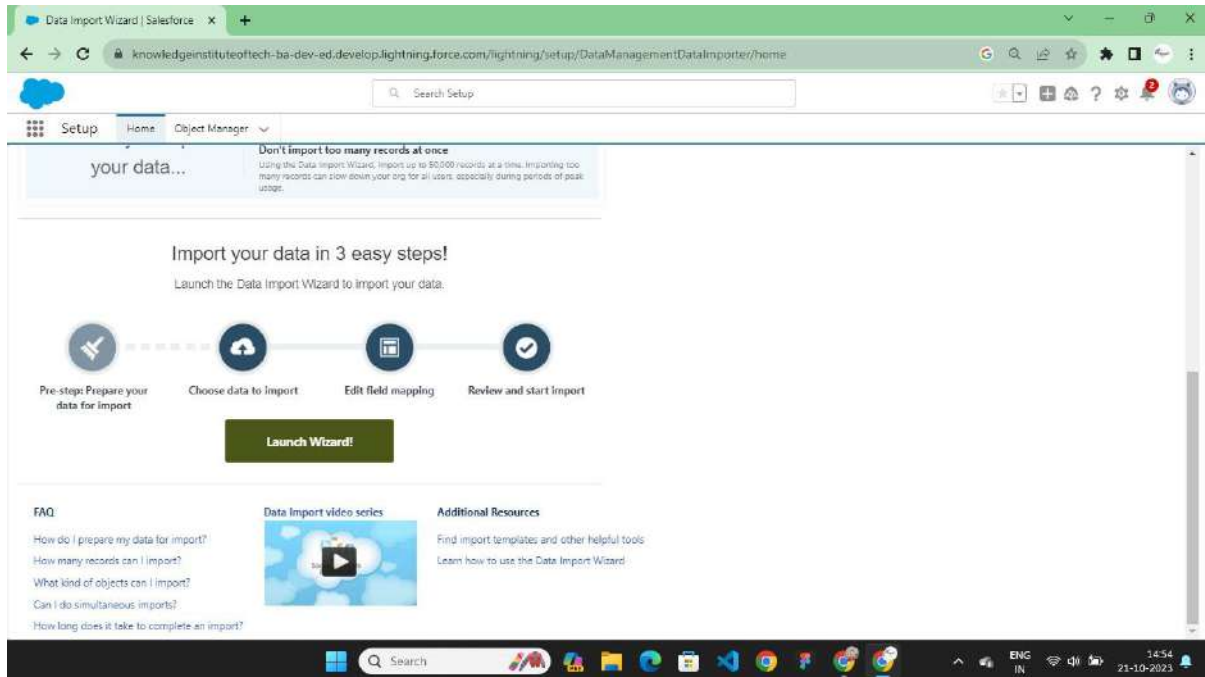
Create a Travel Approval Lightning App

- Build a Lightning app, add tabs, and customize page layouts.
- Create custom objects and fields for the app.
- Define relationships between objects.
- Import data and test the app.



Data Import

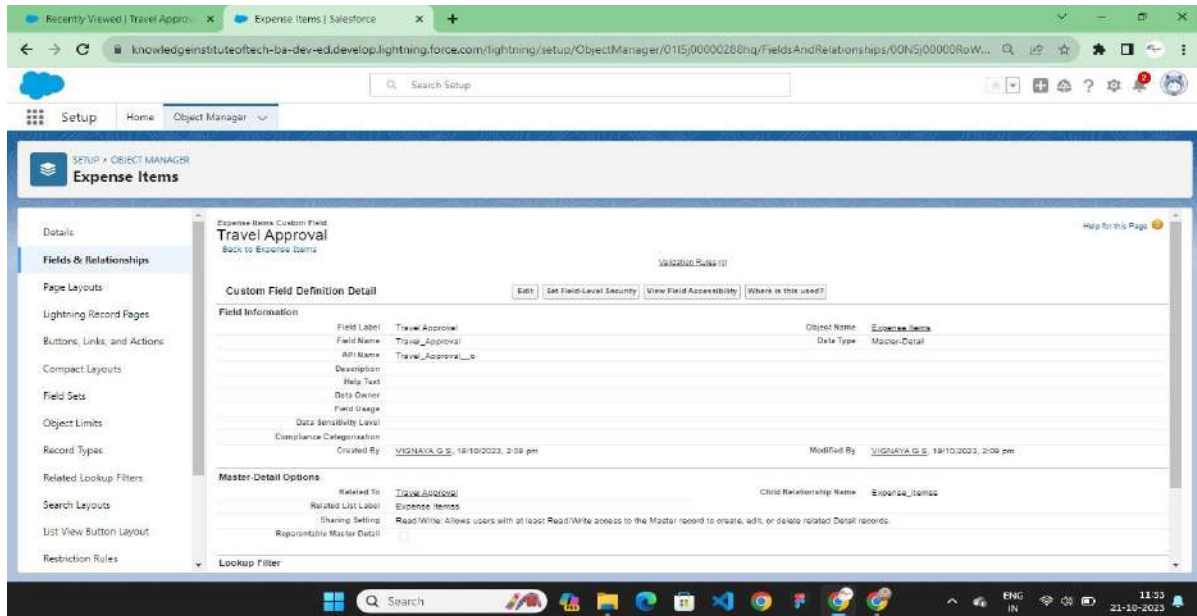
The Data Import Wizard is one of various tools available to Salesforce users for importing data. The tool is best used when importing data into the Account, Contact, Lead, or Solution objects along with any custom objects within your Salesforce organization



Relationship between Objects

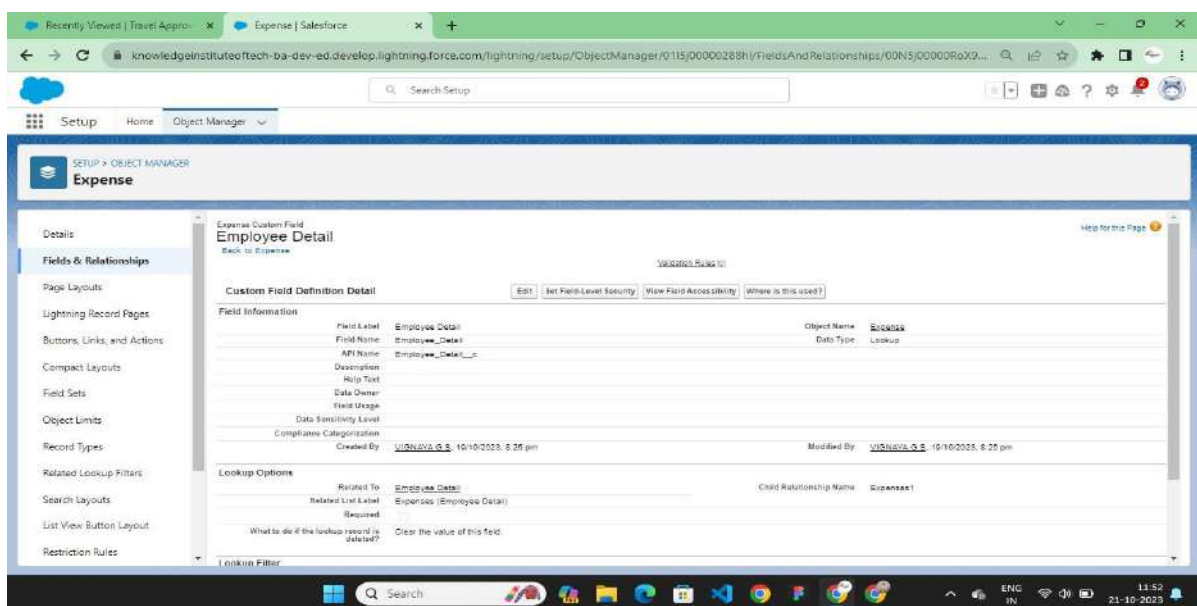
Master-Detail Relationship

A master-detail relationship defines the relationship between the parent and the child. The master table defines the parent relation and the detail defines the child relation.

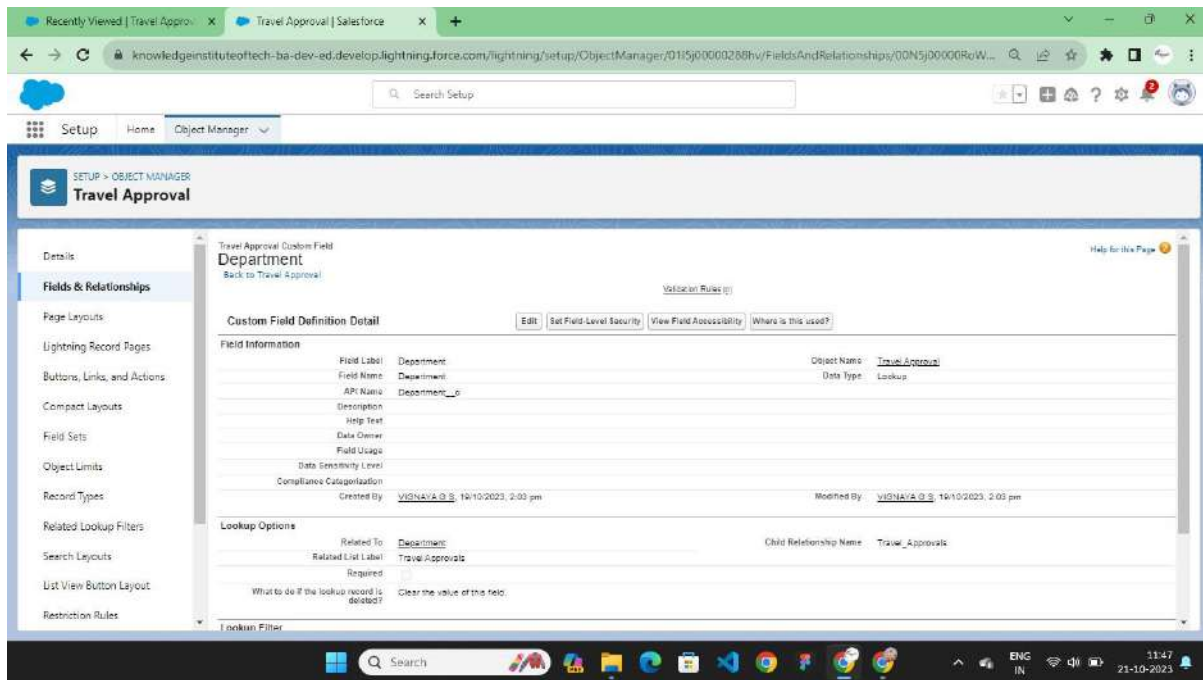


Look up Relationship

Lookup Relationship in Salesforce relates two objects together but does not affect deletion (cascade delete functionality) or security.

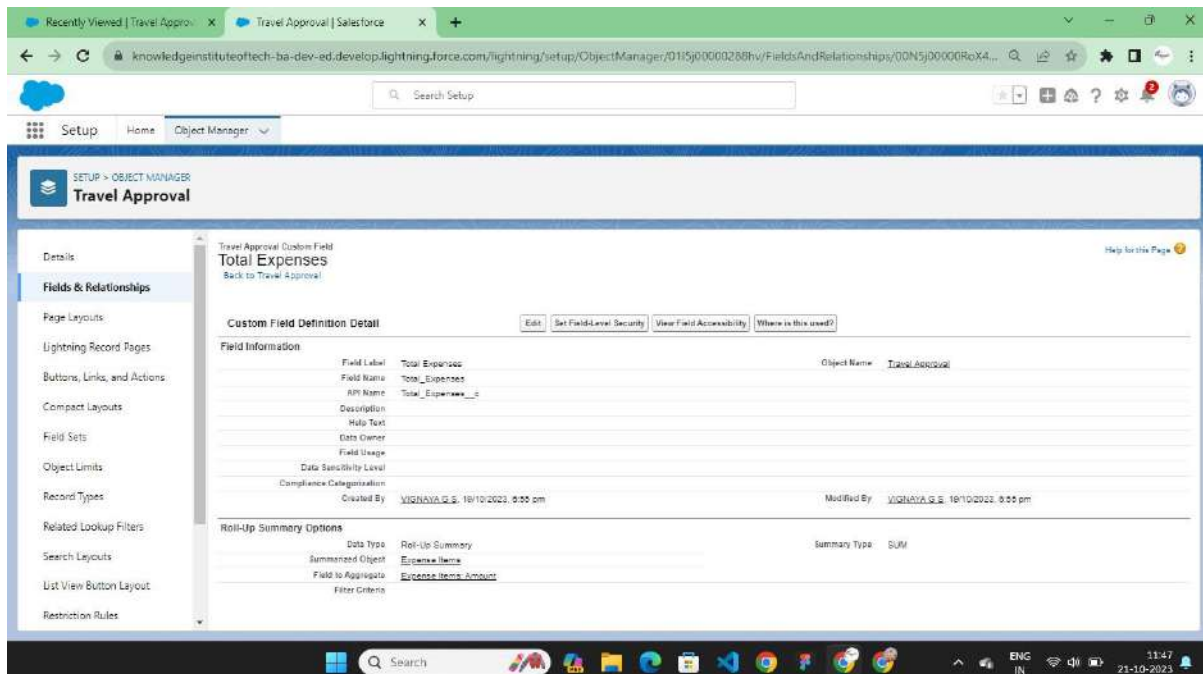


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Roll-up Summary

Roll-Up Summary Fields in Salesforce summarize data of particular fields from a set of related detail records and automatically display the output on the master record.

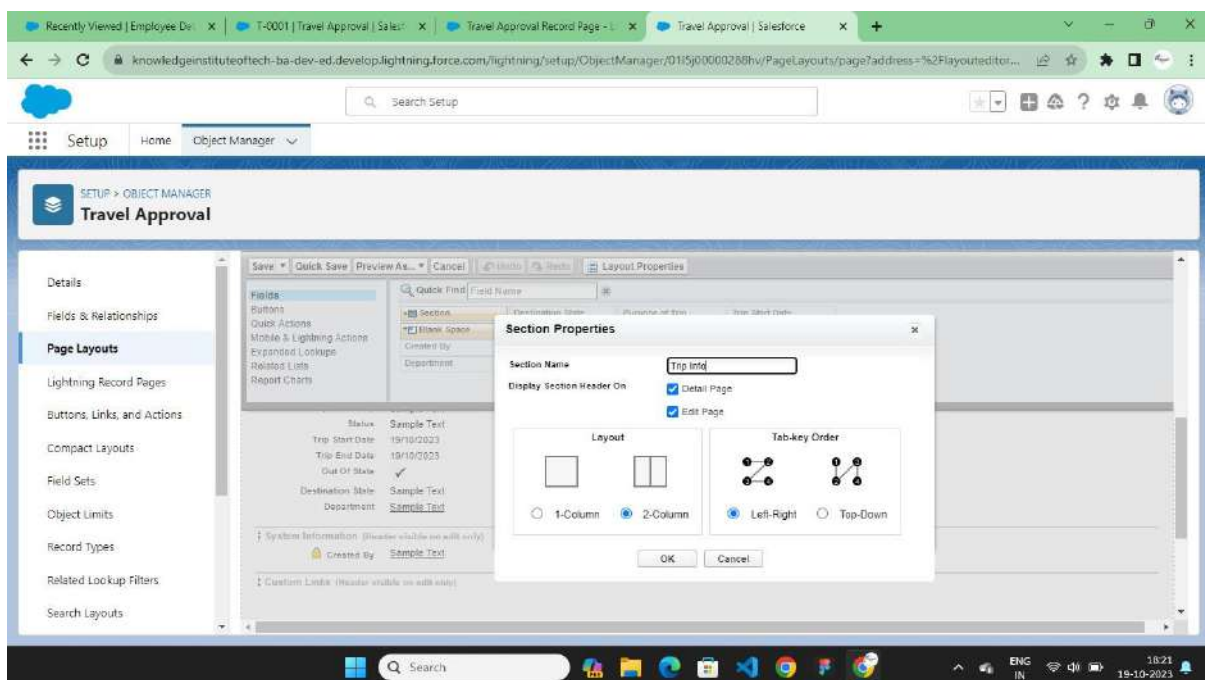
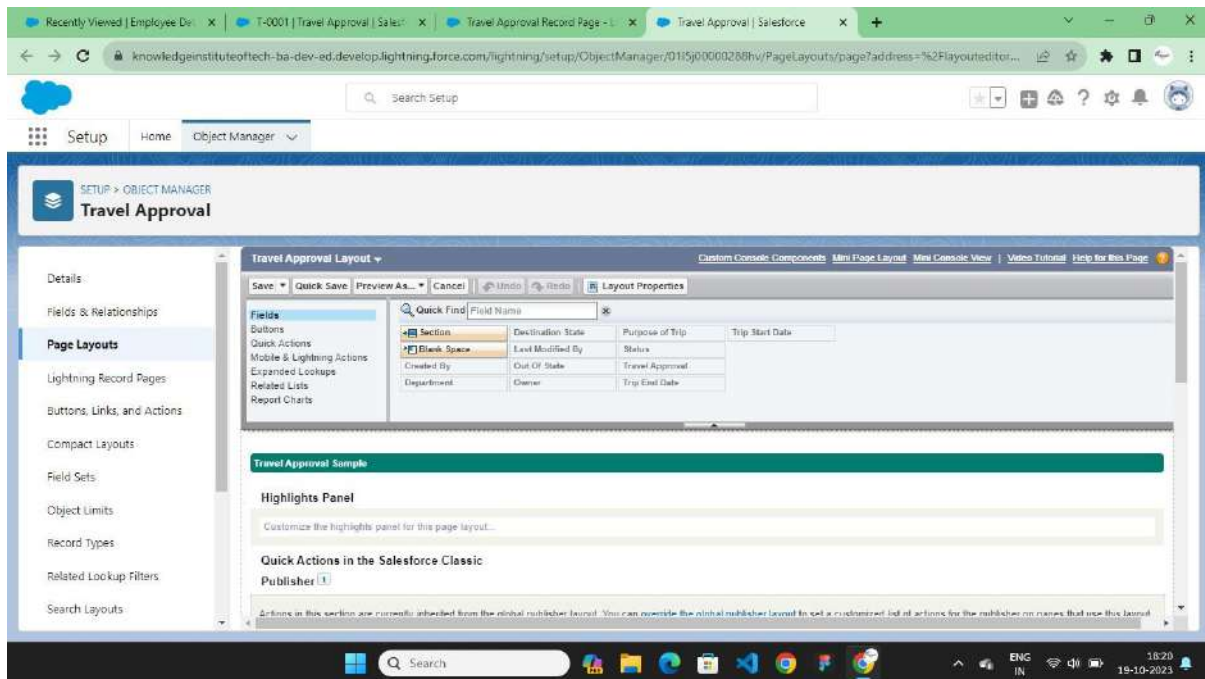


Customize User Interface

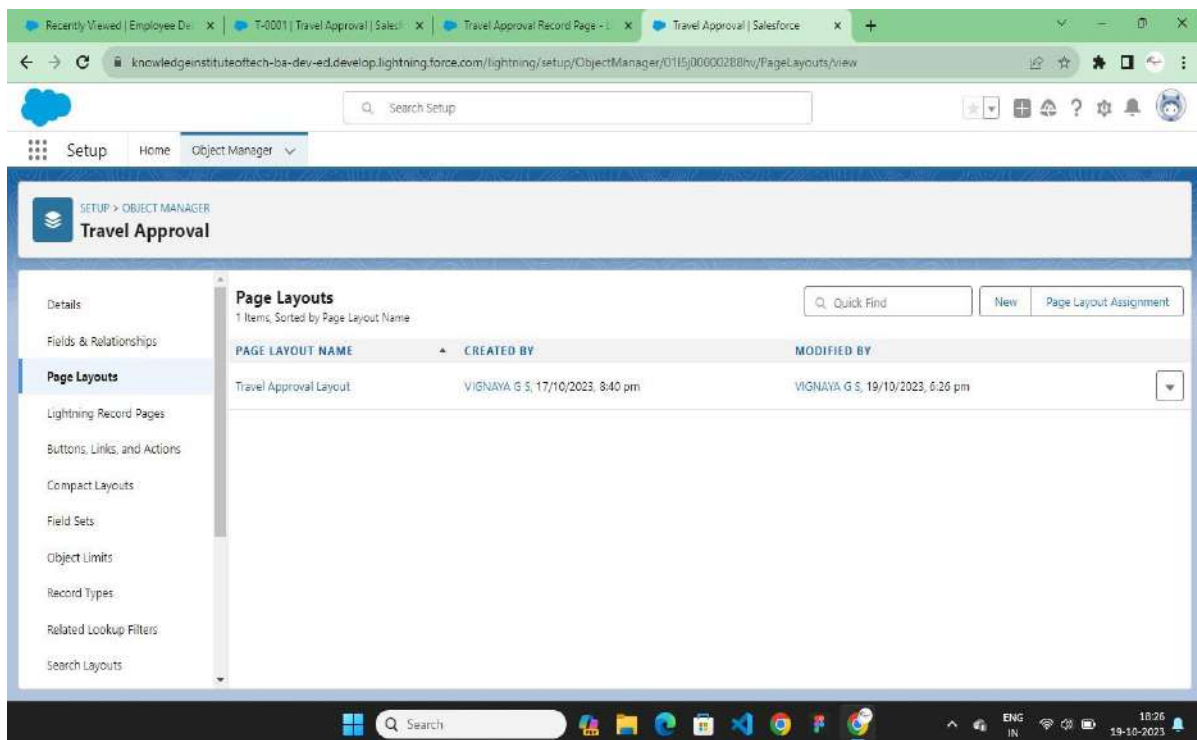
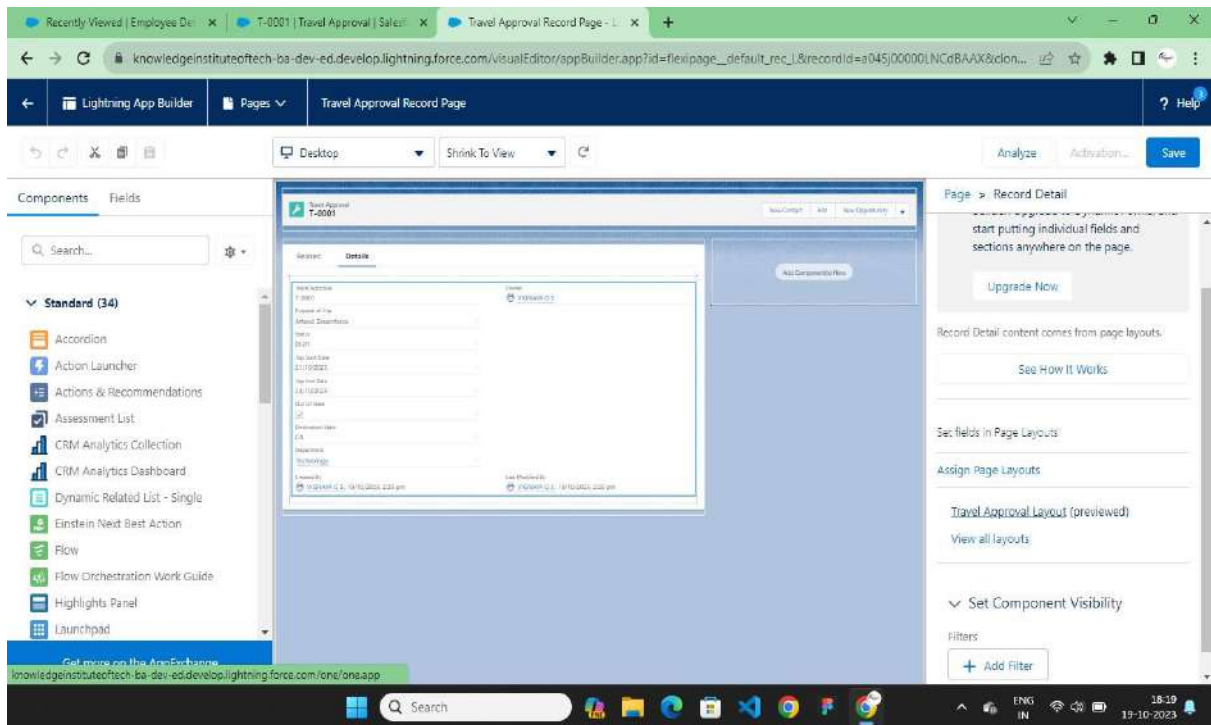
Customize your app's page layouts, compact layouts, and actions.

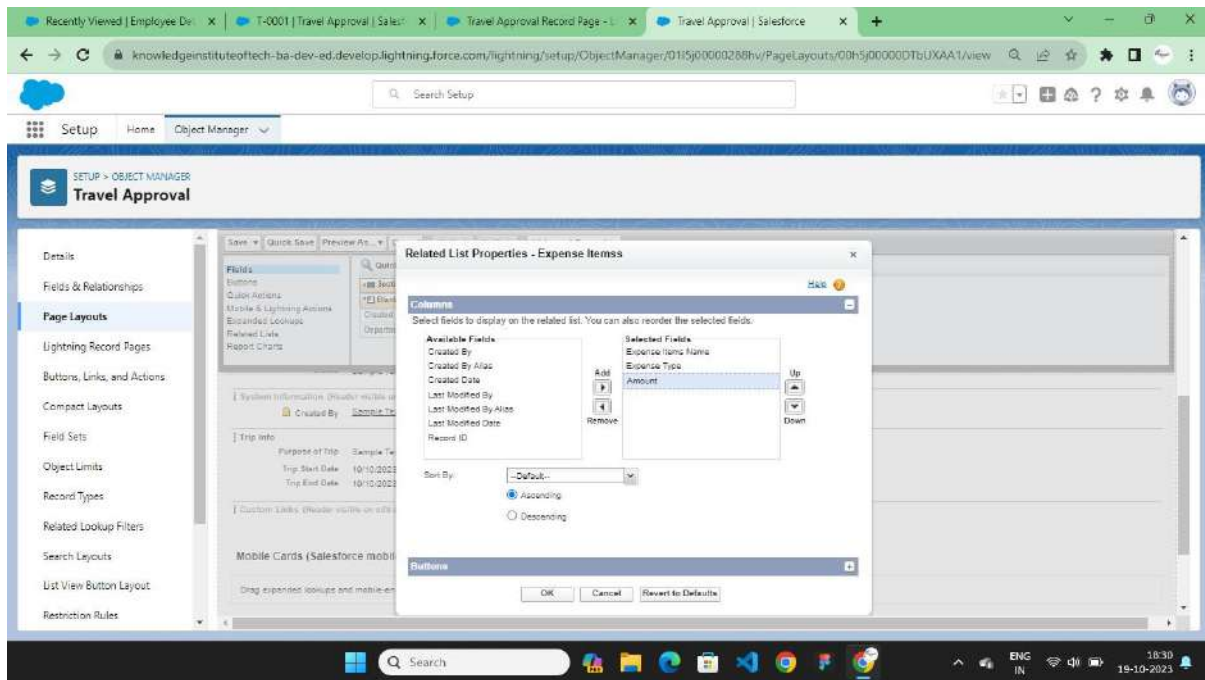
Page Layout

A page layout determines the fields, sections, related lists, and buttons that appear when users view or edit a record. You can modify an object's default page layout or create a custom page layout.



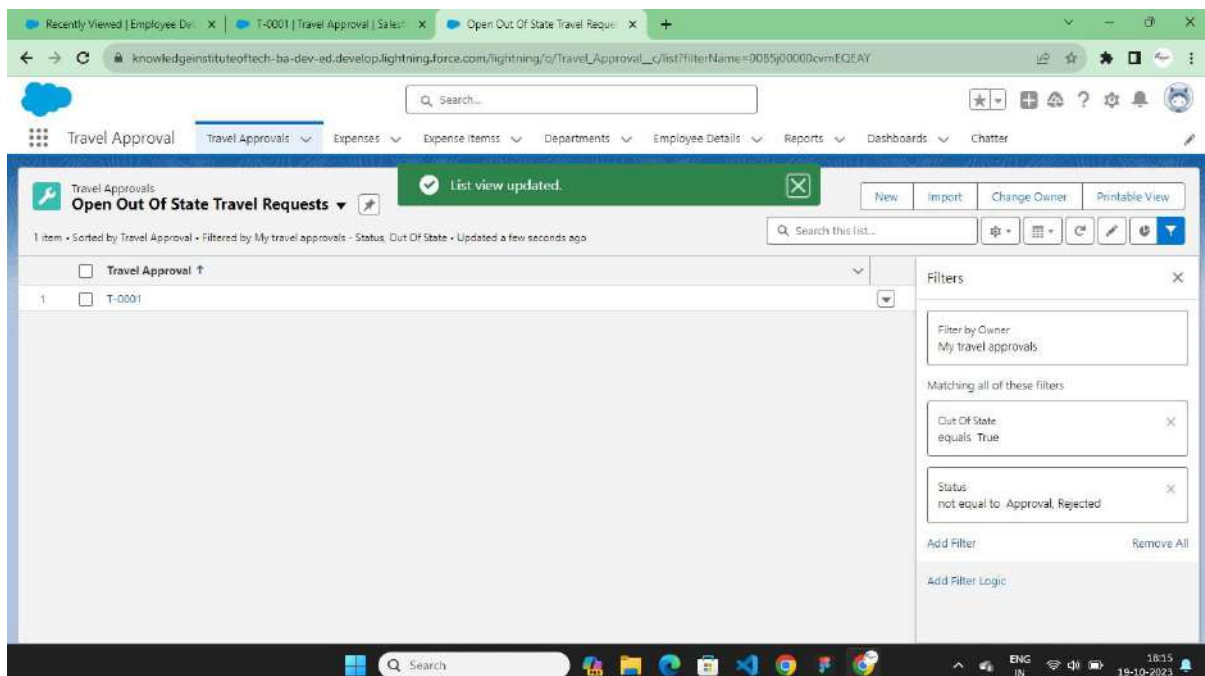
Build A Employee Travel Approval Application For Corporates





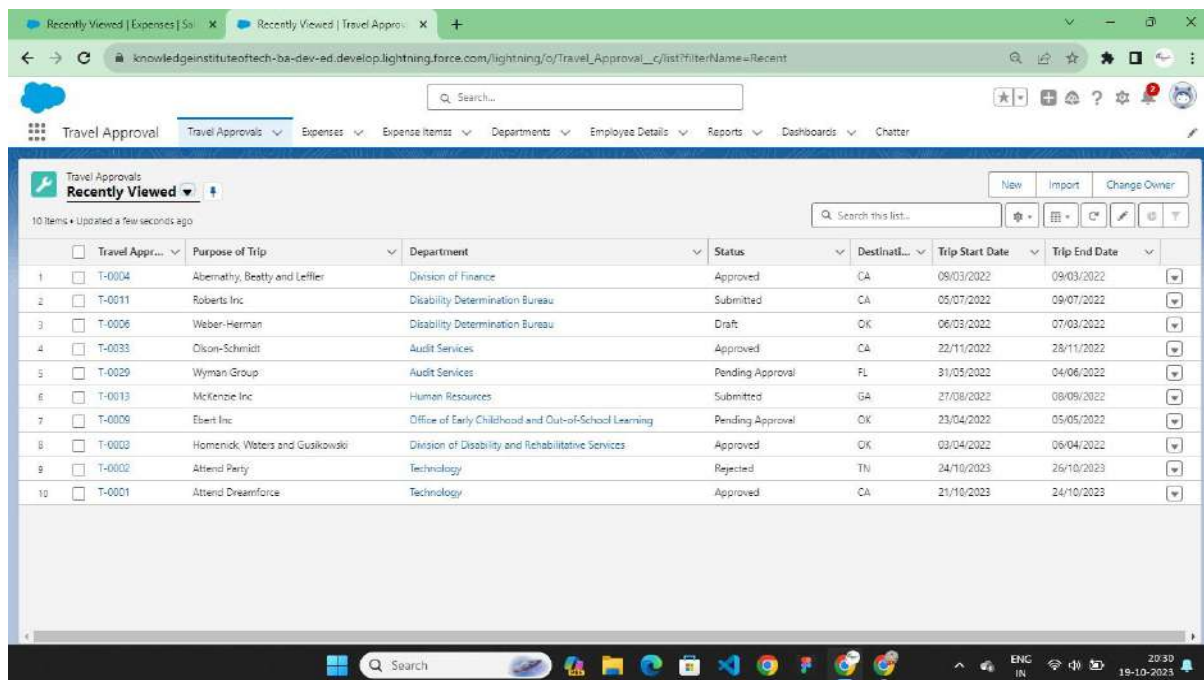
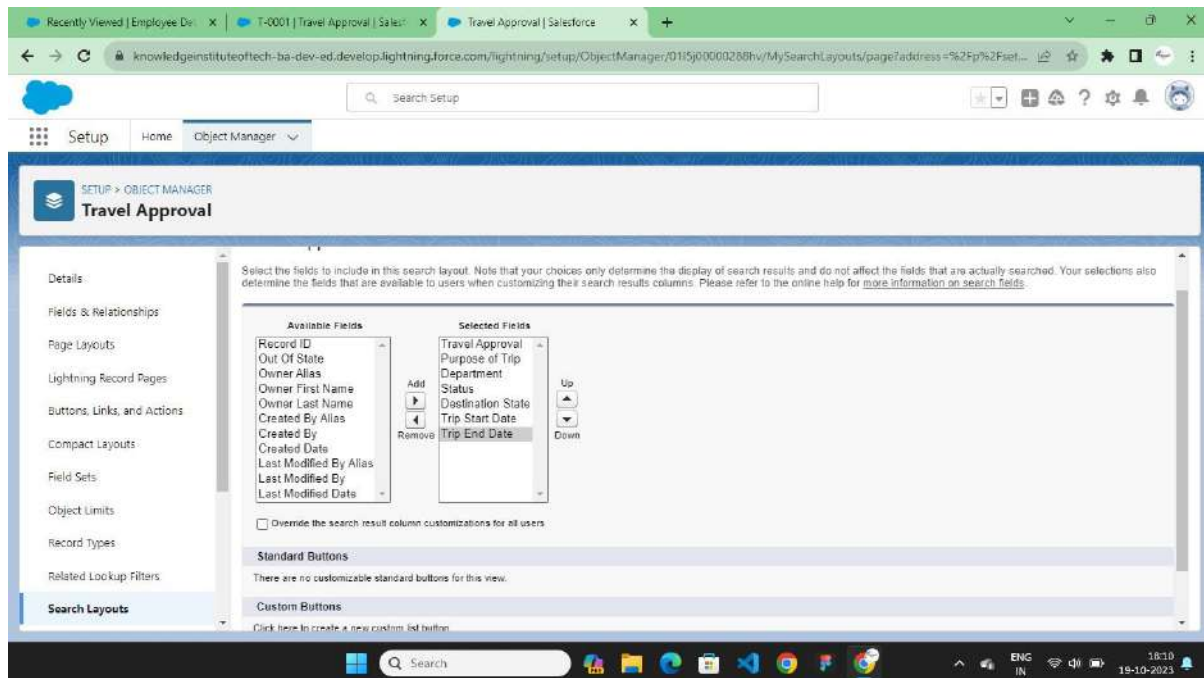
List View

A list view is a set of search conditions that displays records that match the search conditions.



Search Layout

Create search layouts for standard and custom objects, ensuring the layout shows users what's most relevant to them.



Business Logic

Validation Rules

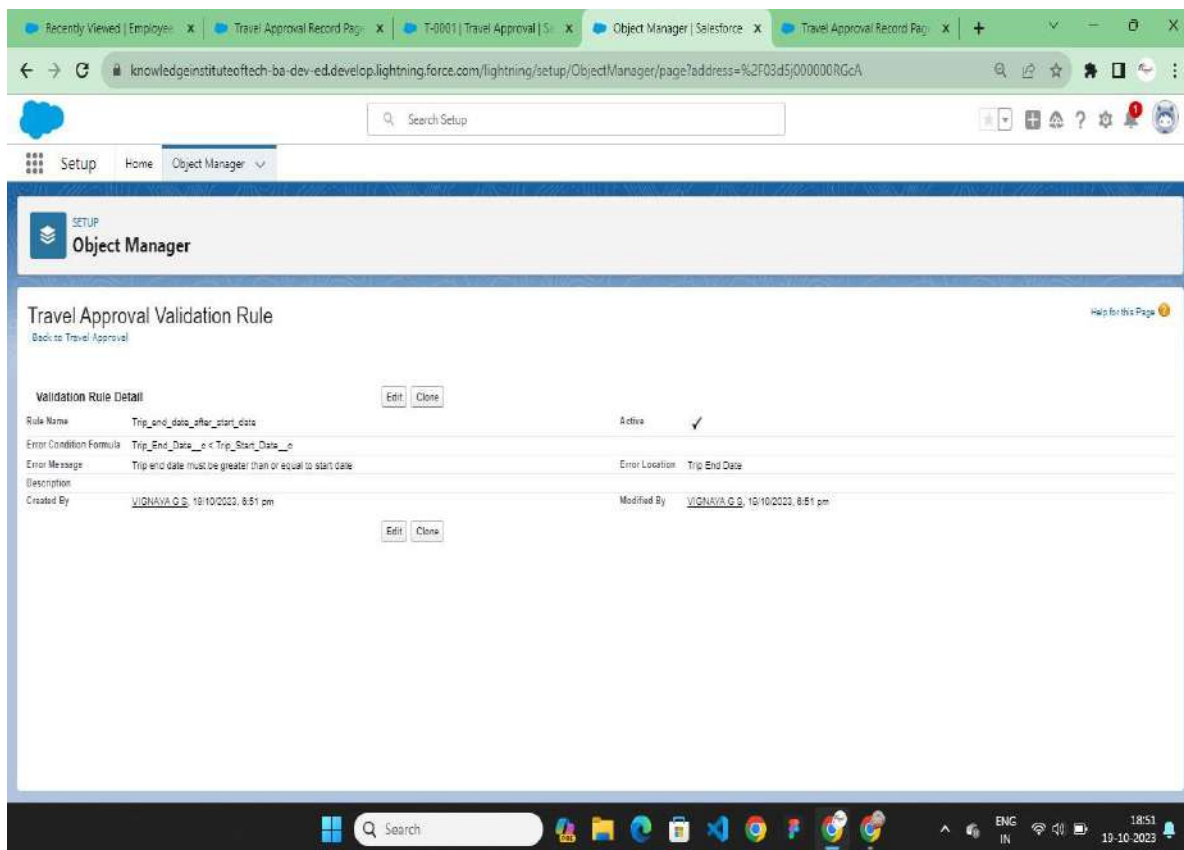
Validation rules let you set up business-specific criteria to prevent users from saving invalid data in one or more fields.

A validation rule evaluates a formula when a record is saved.

If a rule's criteria aren't met, users see a custom error message and the record doesn't save.

If a rule's criteria are met, the record saves.

Use validation rules to improve data quality by applying conditions, ensuring proper formatting, and enforcing consistency.

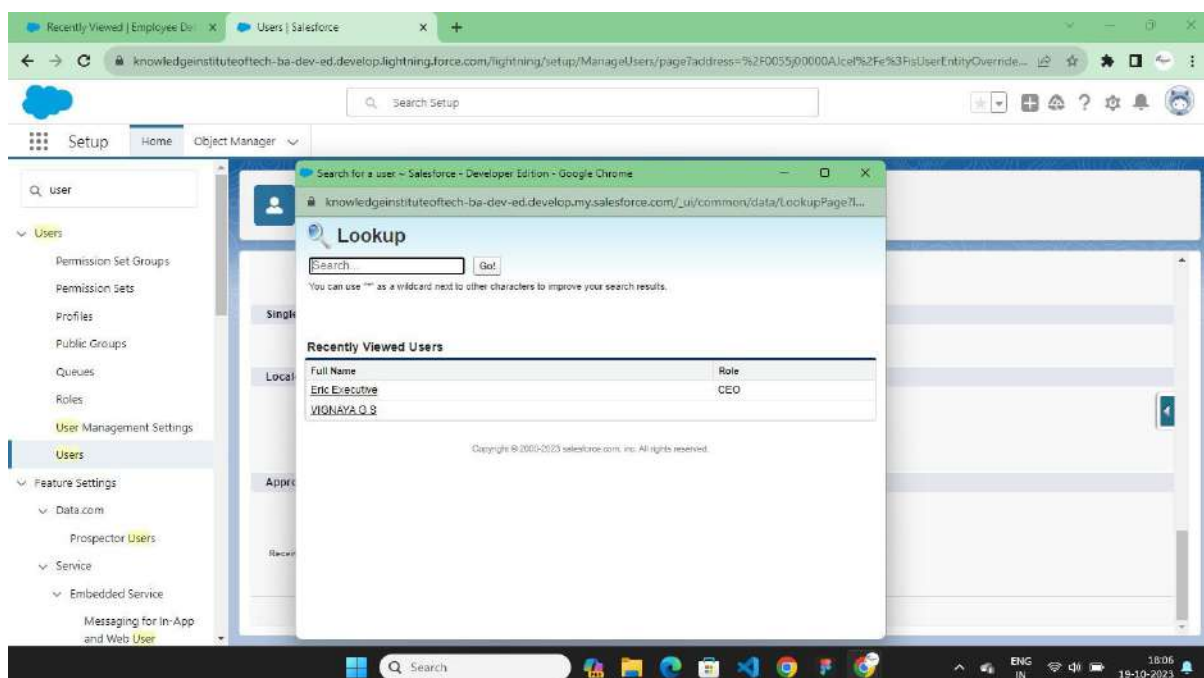
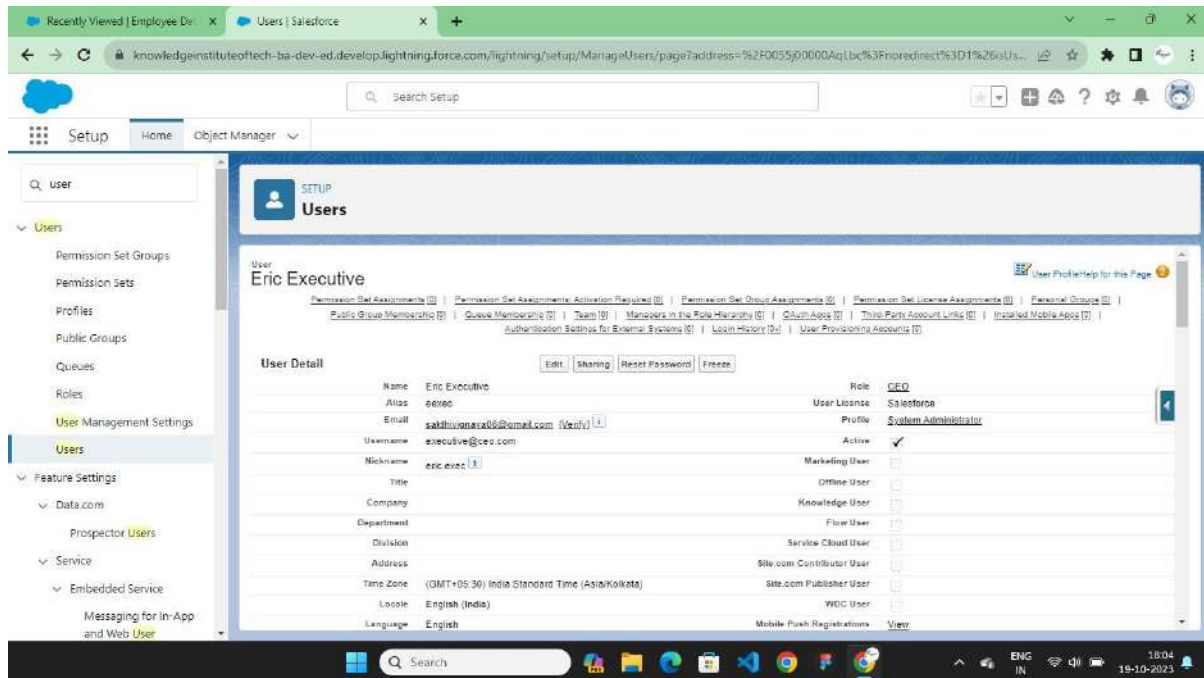


CHAPTER-3

USERS & DATA SECURITY

3.1 User Creation & Setup Approvals

Before customizing the travel app, first create a new user, Eric Executive, and set him up as manager. This involves assigning roles and profiles so that Eric has the correct permissions to approve travel requests.



Build A Employee Travel Approval Application For Corporates

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a navigation menu with options like Users, Permission Set Groups, Profiles, and User Management Settings. The main content area is titled 'Users' and displays configuration details for a specific user. The configuration includes fields for State/Province, Country (set to IN), Single Sign On Information (Federation ID), Locale Settings (Time Zone, Locale, Language), and Approver Settings (Delegated Approver, Manager, Receive Approval Request Emails). The Manager is set to 'Eric Executive'.

Setup

Search Setup

user

Users

State/Province

Country

IN

Single Sign On Information

Federation ID

Locale Settings

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Locale

English (India)

Language

English

Approver Settings

Delegated Approver

Manager

Eric Executive

Receive Approval Request Emails

Only if I am an approver

Save Save & New Cancel

The screenshot shows the Salesforce Setup interface for managing users, specifically the 'Users' section. The left sidebar contains a navigation menu with options like Users, Permission Set Groups, Profiles, and User Management Settings. The main content area is titled 'Users' and displays various membership and team information. The 'Team' section shows a table with columns for Action, Name, Title, Alias, Username, Active, and Manager. The 'Managers in the Role Hierarchy' section shows a table with columns for Action, Created Date, Last Used, Application, and Use Count.

Setup

Search Setup

user

Users

Public Group Membership

No records to display

Queue Membership

No records to display

Team

Action	Name	Title	Alias	Username	Active	Manager
Edit	Eric Executive		eric	eric@digital.com	✓	

Managers in the Role Hierarchy

No records to display

OAuth Apps

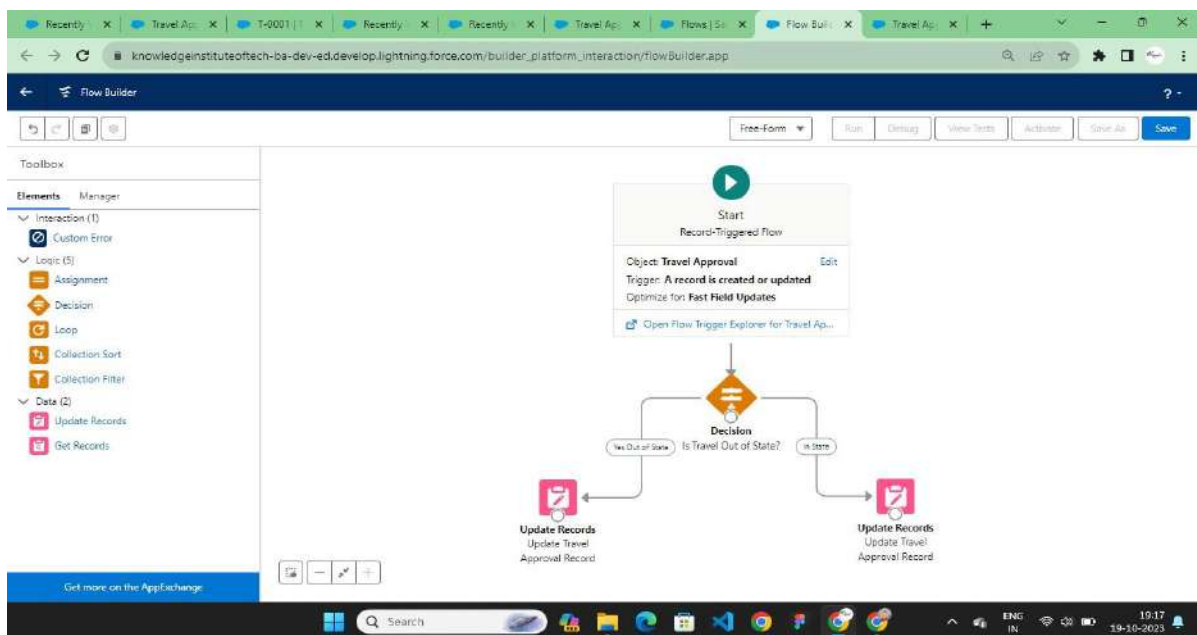
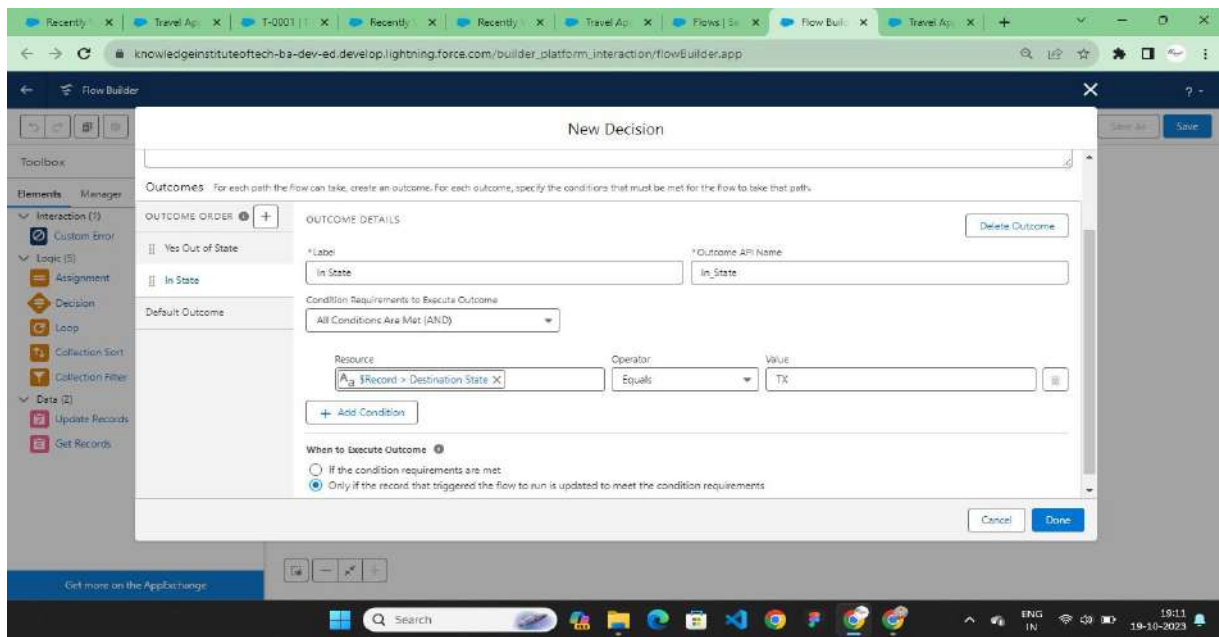
Action	Created Date	Last Used	Application	Use Count
Revoke	19/10/2023, 2:13:18 pm IST	19/10/2023, 2:13:37 pm IST	Trailhead Connected App	2
Revoke	19/10/2023, 2:00:39 pm IST	19/10/2023, 2:00:42 pm IST	ibid digital.salesforce.com	1

CHAPTER-4

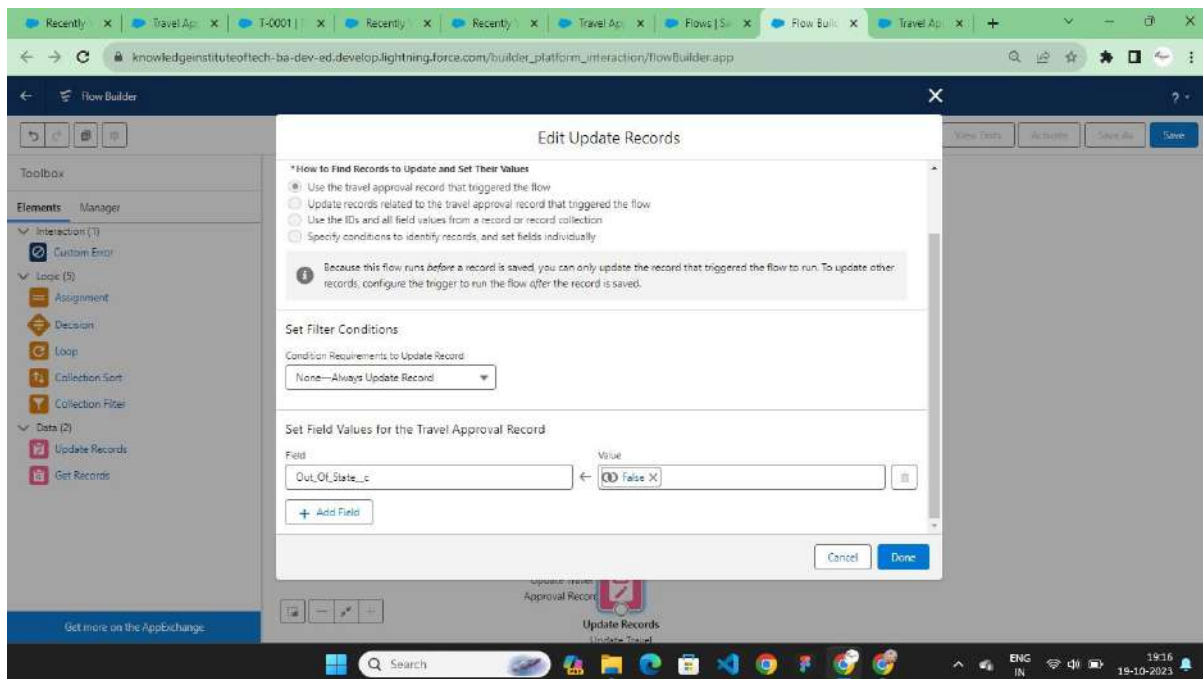
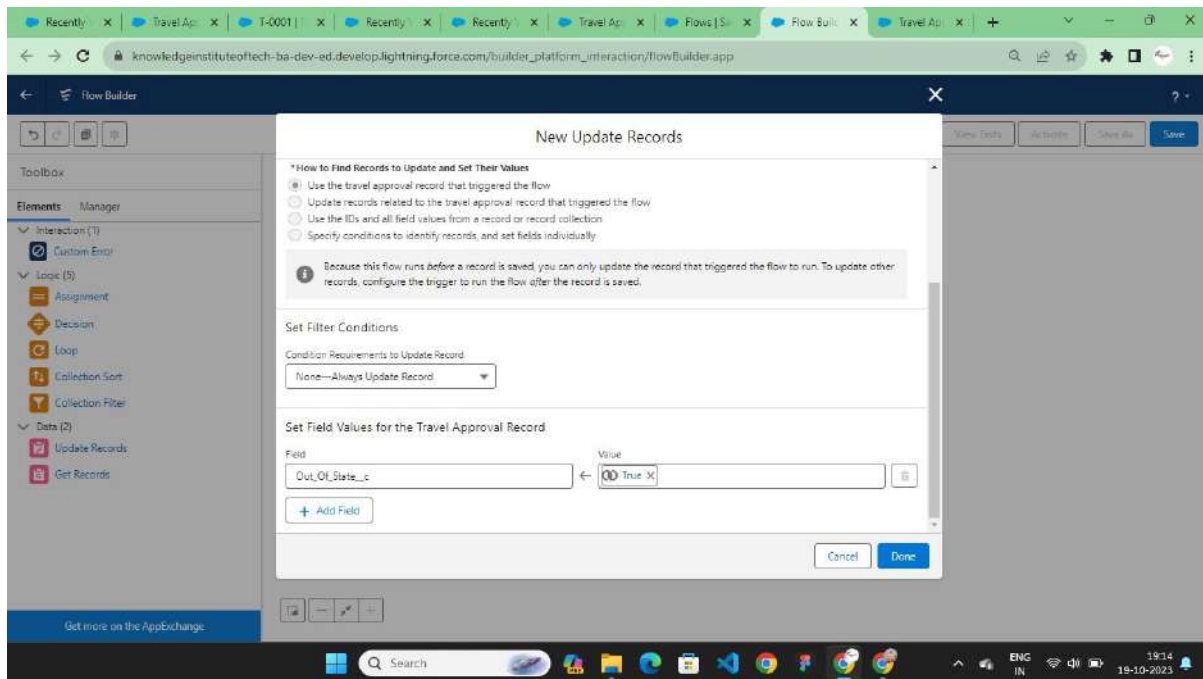
AUTOMATION

Flow

The last business rule functionality to implement before testing your application is a rule to set the Out-of-State checkbox field on the Travel Approval object if out-of-state travel has been chosen. Salesforce offers workflow capabilities that provide a declarative, drag-and-drop design environment to build our business process logic.



Build A Employee Travel Approval Application For Corporates



Approval Process

An approval process is an automated process your agency can use to approve records in Salesforce.

An approval process specifies the criteria a record must meet before it can be submitted for approval, the steps necessary for a record to be approved, and who must approve it at each step.

A step can apply to all records included in the process or just records that have certain attributes. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval.

Approval Processes

Name: **Travel Approval Request**
 Unique Name: **Travel_Approval_Request**
 Approval Assignment Email Template: **Travel_Approval_Request**
 Use Approver Field of Travel Approval: ☐

Specify Entry Criteria
 Use this approval process if the following **criteria are met**

Field	Operator	Value
Travel Approval: Total Expenses	greater than	10
None	None	
None	None	
None	None	
None	None	

Add Filter Logic...

Select Approver
 Using the actions below, specify the user to whom the approval request should be assigned.
☐ Let the submitter choose the approver manually.
☒ Automatically assign an approver using a standard or custom hierarchy field: **Manager**
☐ Automatically assign to queue: **Manager**

Approval Processes

Step 2: Specify Step Criteria
 Specify whether a record must meet certain criteria before entering this approval step. If these criteria are not met, the approval process can skip to the next step, if one exists. [Learn more](#)

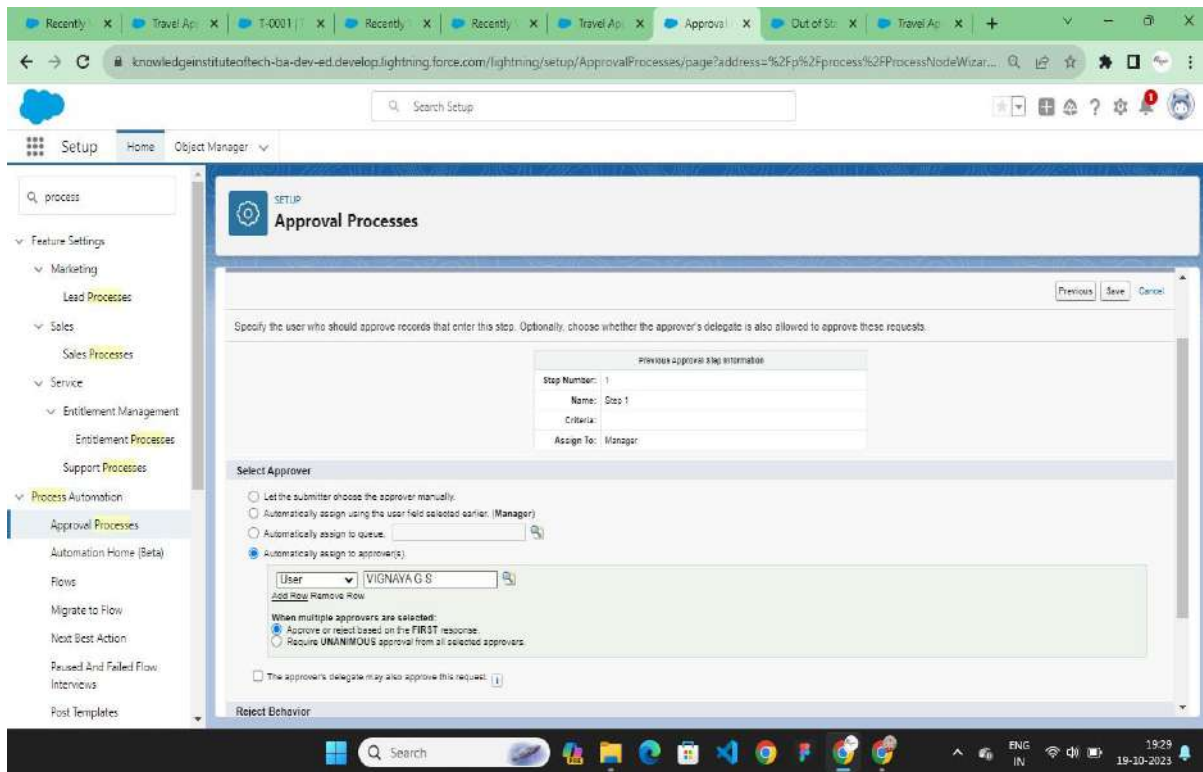
Previous approval step information
 Step Number: 1
 Name: Step 1
 Criteria: Criteria
 Assign To: Manager

Specify Step Criteria
☐ All records should enter this step.
☒ Enter this step if the following **criteria are met**

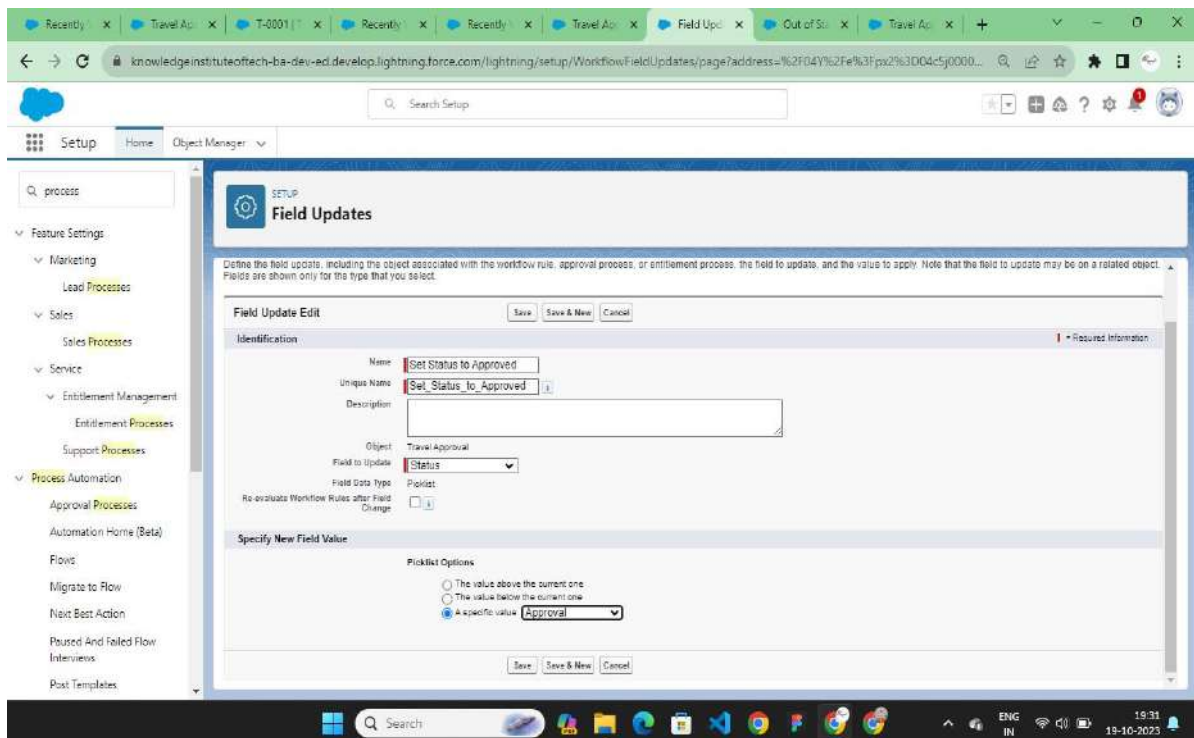
Field	Operator	Value
Travel Approval: Out Of State	equals	True
None	None	
None	None	
None	None	
None	None	

Add Filter Logic...

Build A Employee Travel Approval Application For Corporates

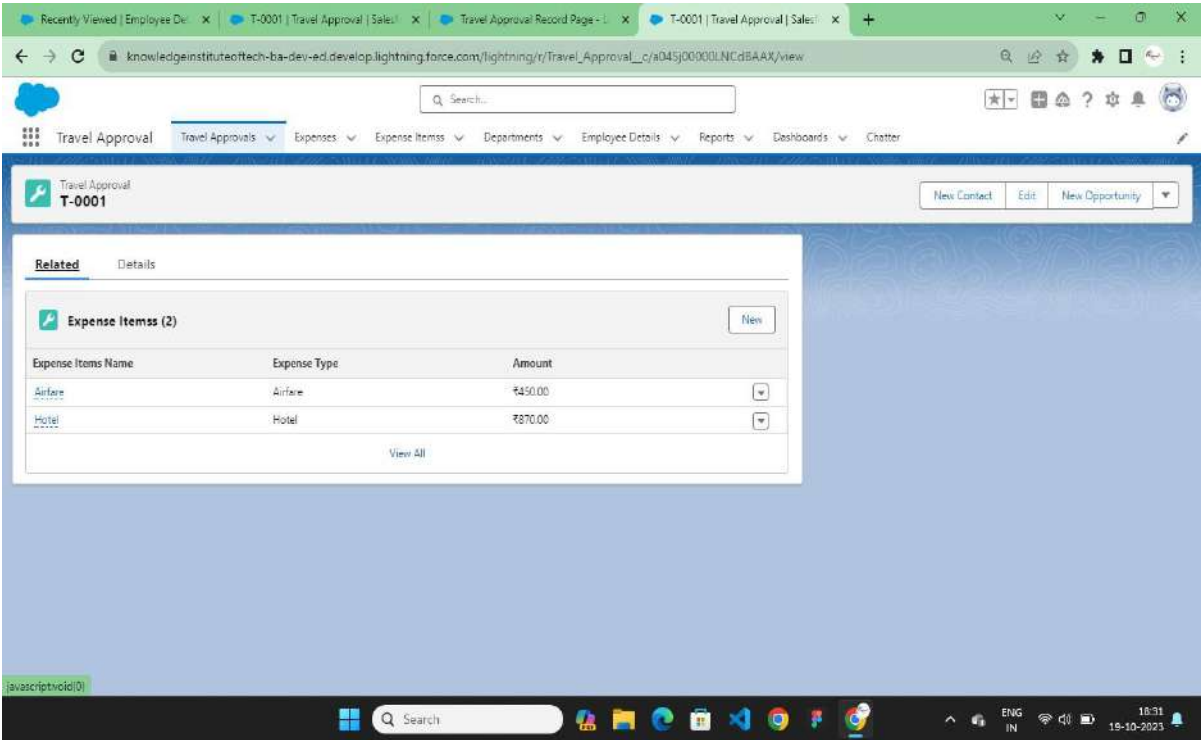
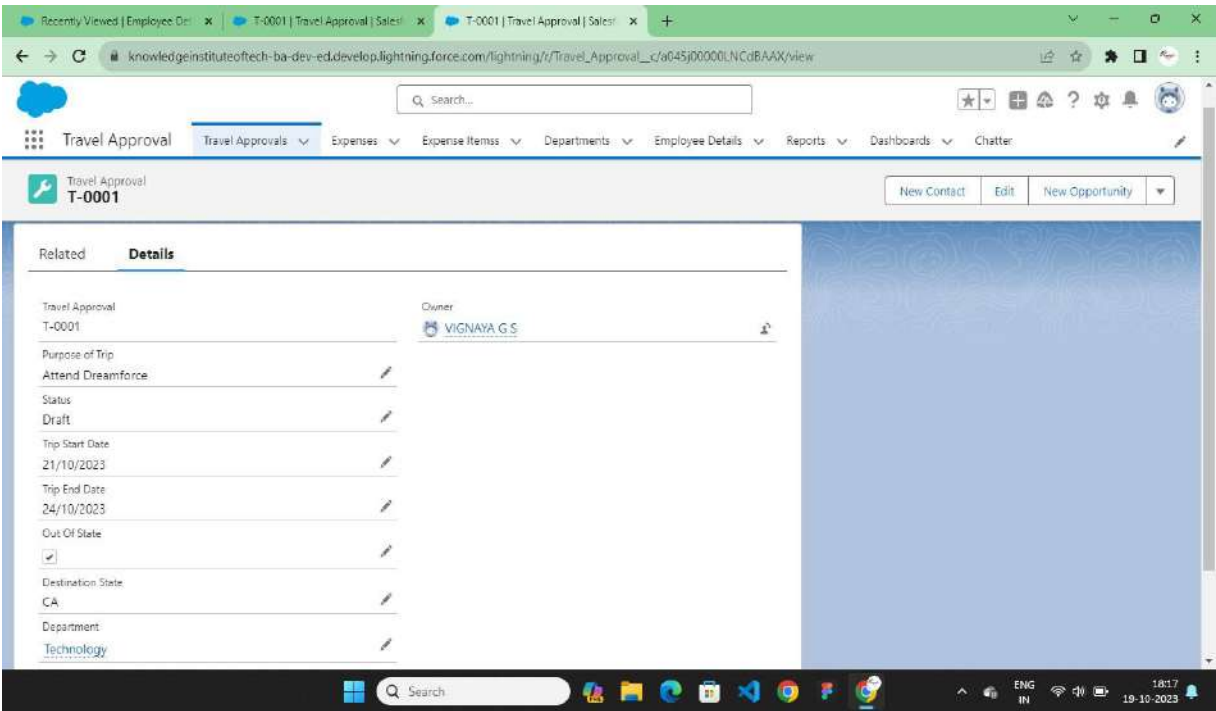


The screenshot shows the Salesforce Setup interface for configuring Approval Processes. The left sidebar contains a navigation menu with categories like Feature Settings, Marketing, Sales, Service, Entitlement Management, Support Processes, and Process Automation. The 'Approval Processes' link is highlighted under Process Automation. The main content area is titled 'Approval Processes' and includes a search bar, a 'Previous' button, and a 'Save' button. The page instructs the user to specify the approver for records entering a step. A table shows 'Previous approval step information' with fields for Step Number (1), Name (Step 1), Criteria, and Assign To (Manager). Below this, the 'Select Approver' section offers four options: manual selection, automatic assignment by user field, automatic assignment to queue, or automatic assignment to approver(s). The 'Automatic assignment to approver(s)' option is selected, and a table lists the approver 'VIGNAVA G S' with a 'User' field. The 'When multiple approvals are selected' section has two options: 'Approve or reject based on the FIRST response' (selected) and 'Require UNANIMOUS approval from all selected approvers'. A checkbox for 'The approver's delegate may also approve this request' is present. The 'Reject Behavior' section is at the bottom.

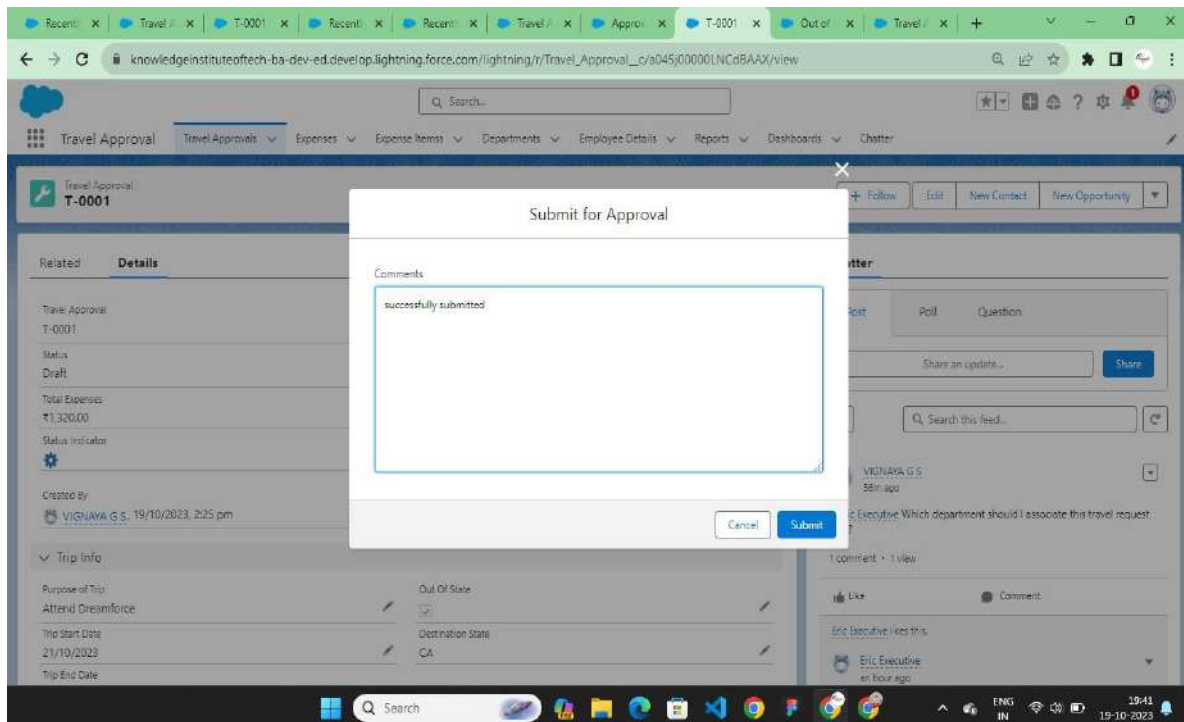
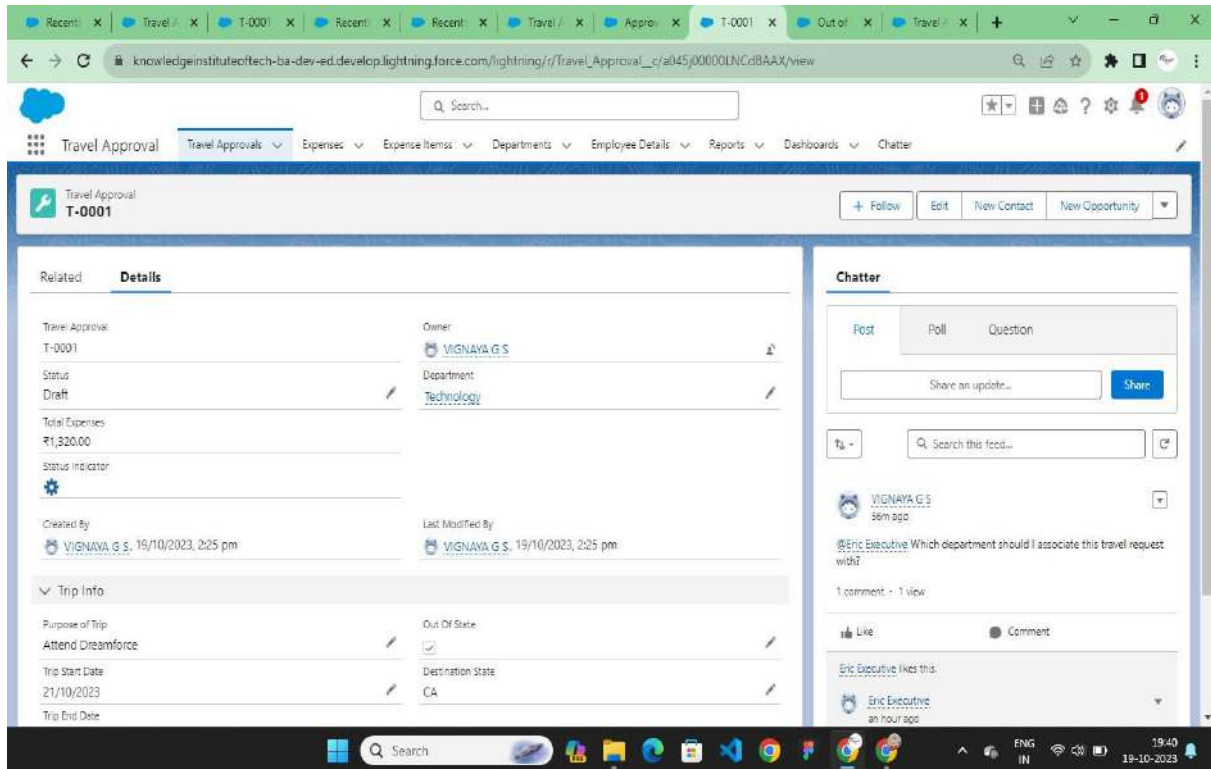


The screenshot shows the Salesforce Setup interface for configuring Field Updates. The left sidebar is the same as the previous screenshot, with 'Field Updates' highlighted under Process Automation. The main content area is titled 'Field Updates' and includes a search bar, a 'Save' button, a 'Save & New' button, and a 'Cancel' button. The page instructs the user to define the field update, including the object, field to update, and the value to apply. The 'Field Update Edit' section has a 'Name' field (Set Status to Approved), a 'Unique Name' field (Set_Status_to_Approved), and a 'Description' field. The 'Object' field is set to 'Travel Approval', and the 'Field to Update' is set to 'Status'. The 'Field Data Type' is 'Picklist', and the 'Re-evaluate Workflow Rules after Field Change' checkbox is checked. The 'Specify New Field Value' section has a 'Picklist Options' section with three options: 'The value above the current one', 'The value below the current one', and 'A specific value' (selected). The 'A specific value' is set to 'Approval'. The 'Save', 'Save & New', and 'Cancel' buttons are at the bottom.

Final Views



Build A Employee Travel Approval Application For Corporates



Build A Employee Travel Approval Application For Corporates

The screenshot shows a Salesforce Lightning interface for a Travel Approval application. The top navigation bar includes links for Travel Approval, Travel Approvals, Expenses, Expense Items, Departments, Employee Details, Reports, Dashboards, and Chatter. The main content area displays the details for Travel Approval T-0001. It includes a table of Expense Items with columns for Expense Items Name, Expense Type, and Amount. Below this is an Approval History table with columns for Step Name, Date, Status, and Assigned To. A Chatter feed on the right shows a comment from Eric Executive asking for department association.

Expense Items Name	Expense Type	Amount
Airfare	Airfare	\$450.00
Hotel	Hotel	\$370.00

Step Name	Date	Status	Assigned To
Step 1	19/10/2023, 7:41 pm	Pending	Eric Executive
Approval Request Submitted	19/10/2023, 7:41 pm	Submitted	VIGNAVA G S

Chatter Feed:

- VIGNAVA G S 57m ago: @Eric Executive Which department should I associate this travel request with?
- Eric Executive likes this.
- Eric Executive an hour ago: Technology is the correct department.

The screenshot shows a Salesforce Lightning interface for a Travel Approval application. The top navigation bar includes links for Travel Approval, Travel Approvals, Expenses, Expense Items, Departments, Employee Details, Reports, Dashboards, and Chatter. The main content area displays the details for Travel Approval T-0002. It includes a table of Related records with columns for Travel Approval, Status, Total Expenses, Status Indicator, Created By, and Last Modified By. Below this is a Trip Info section with fields for Purpose of Trip, Attend Party, Trip Start Date, Trip End Date, Out Of State, and Destination State. A Chatter feed on the right shows a comment from Eric Executive updating the record.

Travel Approval	Status	Total Expenses	Status Indicator	Created By	Last Modified By
T-0002	Rejected	\$450.00		VIGNAVA G S, 19/10/2023, 7:46 pm	Eric Executive, 19/10/2023, 7:49 pm

Trip Info:

- Purpose of Trip: Attend Party
- Attend Party: [Name]
- Trip Start Date: 24/10/2023
- Trip End Date: [Date]
- Out Of State: [Checked]
- Destination State: TN

Chatter Feed:

- Eric Executive updated this record. Just now: Status Submitted to Rejected

Build A Employee Travel Approval Application For Corporates

The screenshot shows the Salesforce Travel Approvals interface. The top navigation bar includes links for Travel Approvals, Expenses, Expense Items, Departments, Employee Details, Reports, Dashboards, and Chatter. The main content area displays a list of 10 items under the 'Recently Viewed' tab. The list includes columns for Travel Appr..., Purpose of Trip, Department, Status, Destinatl..., Trip Start Date, and Trip End Date. The items are numbered 1 through 10, each with a checkbox and a dropdown arrow.

	Travel Appr...	Purpose of Trip	Department	Status	Destinatl...	Trip Start Date	Trip End Date
1	<input type="checkbox"/> T-0004	Abernathy, Beatty and Leffler	Division of Finance	Approved	CA	09/03/2022	09/03/2022
2	<input type="checkbox"/> T-0011	Roberts Inc	Disability Determination Bureau	Submitted	CA	05/07/2022	09/07/2022
3	<input type="checkbox"/> T-0006	Weber-Herman	Disability Determination Bureau	Draft	OK	06/03/2022	07/03/2022
4	<input type="checkbox"/> T-0033	Dixon-Schmidt	Audit Services	Approved	CA	22/11/2022	28/11/2022
5	<input type="checkbox"/> T-0029	Wyman Group	Audit Services	Pending Approval	FL	31/05/2022	04/06/2022
6	<input type="checkbox"/> T-0013	McKenzie Inc	Human Resources	Submitted	GA	27/08/2022	09/09/2022
7	<input type="checkbox"/> T-0009	Ebert Inc	Office of Early Childhood and Out-of-School Learning	Pending Approval	OK	23/04/2022	05/05/2022
8	<input type="checkbox"/> T-0003	Hornerick, Waters and Guskowski	Division of Disability and Rehabilitative Services	Approved	OK	03/04/2022	06/04/2022
9	<input type="checkbox"/> T-0002	Attend Party	Technology	Rejected	TN	24/10/2023	26/10/2023
10	<input type="checkbox"/> T-0001	Attend Dreamforce	Technology	Approved	CA	21/10/2023	24/10/2023

The screenshot shows the Salesforce Chatter interface. The top navigation bar includes links for Travel Approvals, Expenses, Expense Items, Departments, Employee Details, Reports, Dashboards, and Chatter. The main content area displays a post by Eric Executive, asking which department should be associated with a travel request. The post has 1 comment and 1 view. The comment is by Eric Executive, stating that Technology is the correct department. The right sidebar shows Einstein Recommendations for Eric Executive, including Integration User and Security User.

What I Follow
To Me
Bookmarked
Company Highlights
My Drafts

STREAMS +
You don't have any streams yet. Try creating one!

RECENT GROUPS +
Aw, you don't have any groups! Why not create or join some now?

Post Poll Question

Share an update...

Sort by: Top Posts

T-0001 — VIGNAWA 5 1h ago

@Eric Executive Which department should I associate this travel request with?

Like Comment 1 comment · 1 view

Eric Executive likes this.

Eric Executive 2 hours ago
Technology is the correct department.
Like

Write a comment...

Einstein Recommendations

Eric Executive Your manager + Follow Skip

Integration User Joined in the last week + Follow Skip

Security User Joined in the last week + Follow Skip

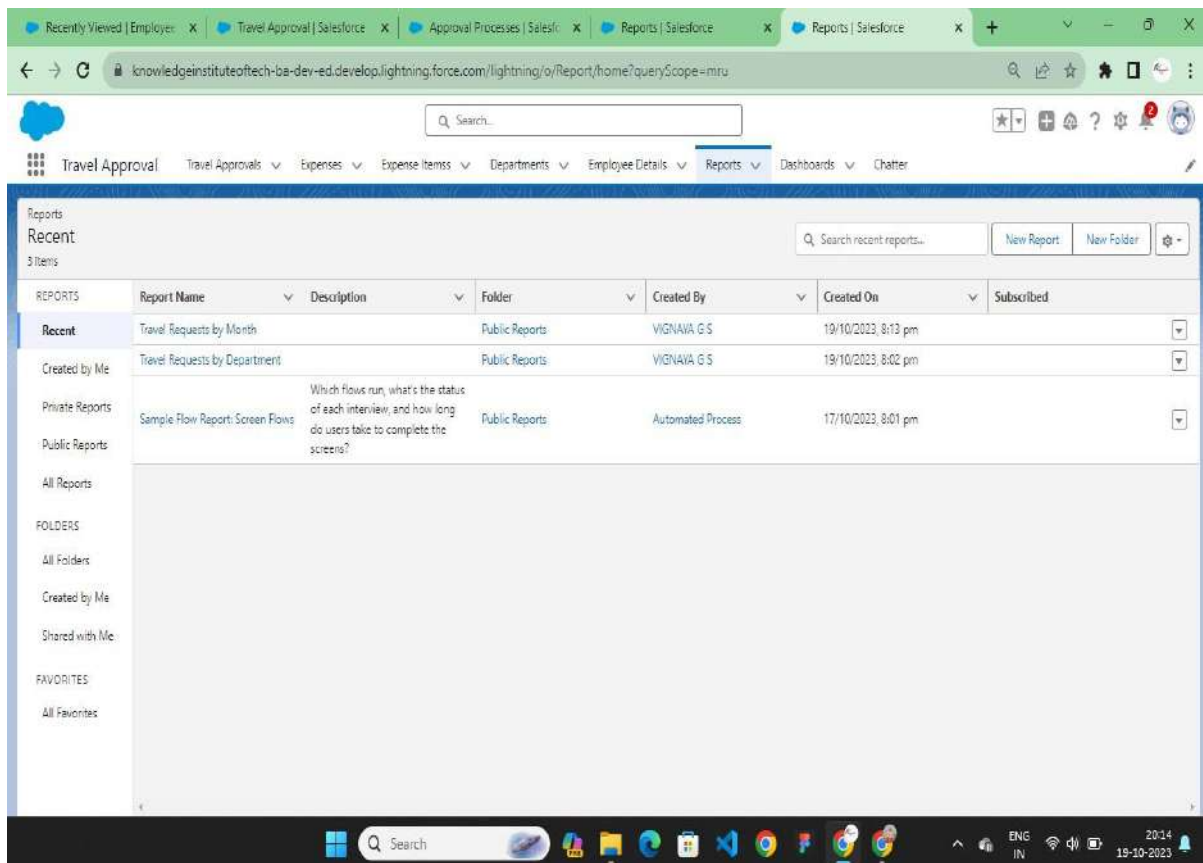
CHAPTER-5

REPORTS & DASHBOARD

Reports

A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits.

The report builder provides a drag-and-drop interface to easily build and customize your reports.

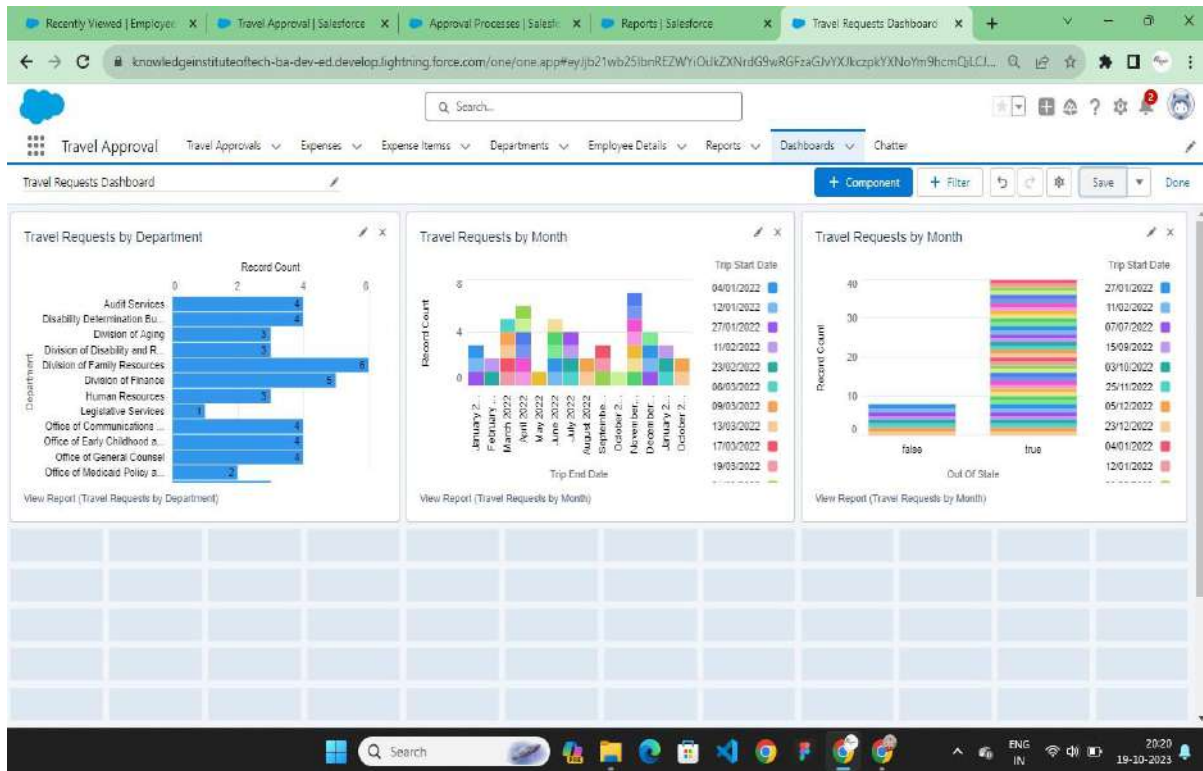


The top screenshot displays a Salesforce report titled "Travel Requests by Department". The report shows a list of travel requests categorized by department. The columns include Department, Travel Approval, Status, Out of State, Destination State, Trip Start Date, and Trip End Date. The report is filtered by Department, showing results for Audit Services (4), Disability Determination Bureau (4), and Division of Aging (3). The total number of records is 48, and the total number of out-of-state requests is 40.

The bottom screenshot shows the Salesforce Report Builder interface for the "Travel Requests by Department" report. The report is titled "New Travel Approvals Report". The report builder shows a list of filters and columns that can be added to the report. The report is currently set to show a preview of a limited number of records. The report data is displayed in a table with columns for Trip End Date, Trip Start Date, Travel Approval, Department, Status, Out of State, and Destination State. The report shows results for various departments, including Office of Early Childhood and Out-of-School Learning, Division of Disability and Rehabilitative Services, Office of Medicaid Policy and Planning, Human Resources, Audit Services, and Division of Aging.

Dashboard

A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.



CHAPTER-6

CONCLUSION

In conclusion, the development of an employee travel approval application for corporates is a critical step towards streamlining and enhancing the travel management process within organizations. This application serves as a centralized, efficient, and user-friendly tool for managing employee travel requests, approvals, and associated processes.

In building an employee travel approval application, it's essential to engage relevant stakeholders, including HR, finance, and IT teams, to ensure that the application aligns with organizational goals and requirements. Furthermore, thorough testing and training should be conducted to guarantee a smooth and successful implementation.

By addressing these key points and creating a tailored travel approval application that aligns with the unique needs and policies of the corporate, organizations can enhance their travel management processes, improve cost control, and provide a more satisfying experience for employees and travel administrators alike.

DEMONSTRATION

Github:

<https://github.com/Priyanka6114/Build-a-Employee-Travel-Approval-Application-for-corporates>

Demo Link:

https://drive.google.com/file/d/1dcV0TRglZp5fHGe7BqCEtcmrlse_X_OC/view?usp=drivesdk