PROJECT REPORT TEMPLATE
BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

TEAM ID : NM2023TMID02187

TEAM SIZE : 4

TEAM LEADER : PURUSHOTHAMAN . S

TEAM MEMBER : ABINAYA . M

TEAM MEMBER : AMUTHASURABI . A

TEAM MEMBER : ARULMOZHI . V

1.INTRODUCTION

1.1 Overview :

The project aim is to provide real-time knowledge for all the students who have basic knowledge of salesforce 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 salesforce with the help of this project they will gain knowledge and can include into their resume as well.

In this project we will learn,

1. Real time sales force project
2. Object & relationship in salesforce

2.PURPOSE

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

A travel request form helps gather employee trip details and allows you to reject or approve their travel and reimburse their expenses.

TRAVEL APPROVAL SAMPLE APPLICATION

- About the sample application
- Prerequisites
- Installing the sample application
- Defining the use of an external web browser
- 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
- Logging in as a manager for approving travel requests
- Approving a travel request.

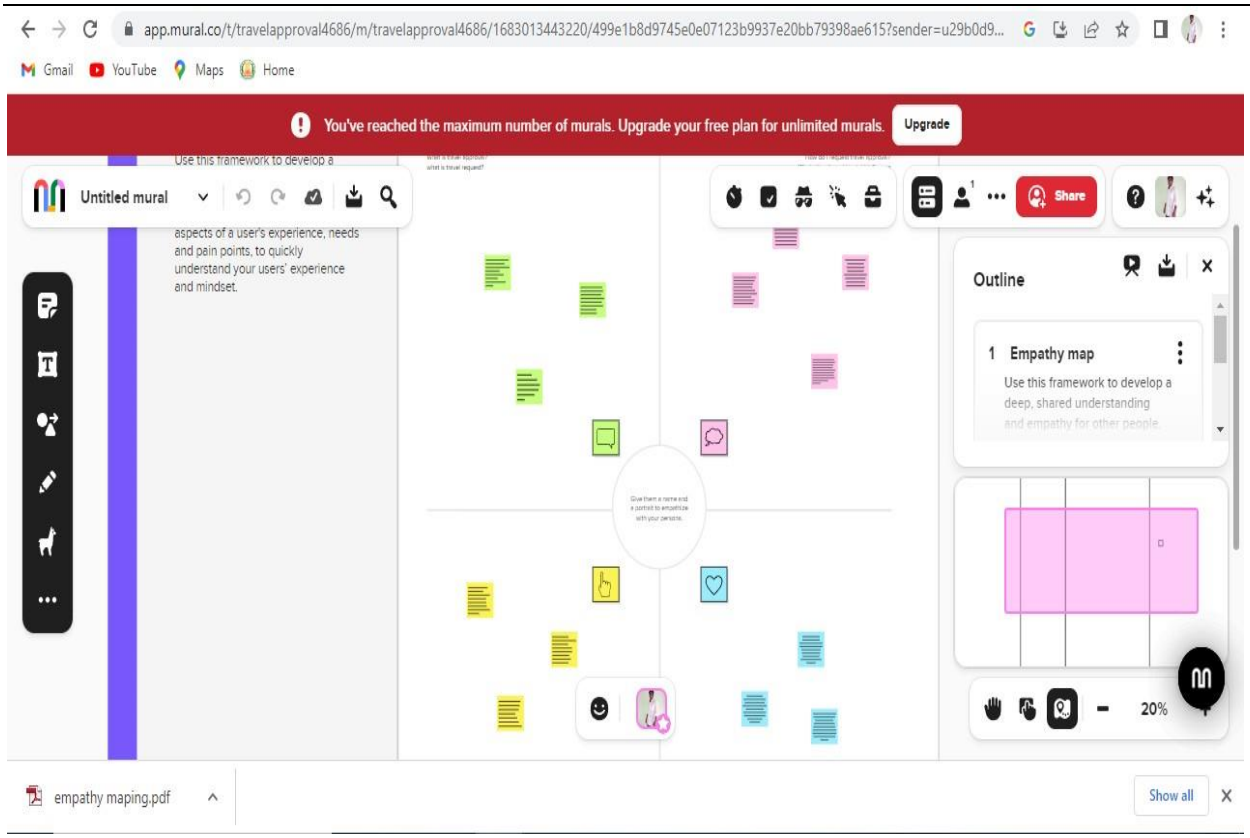
2. Problem Definition & Design Thinking

2.1 Empathy map :

An empathy map is a collaborative visualization used to articulate what we know about a particular type of user. It externalizes knowledge about users in order to

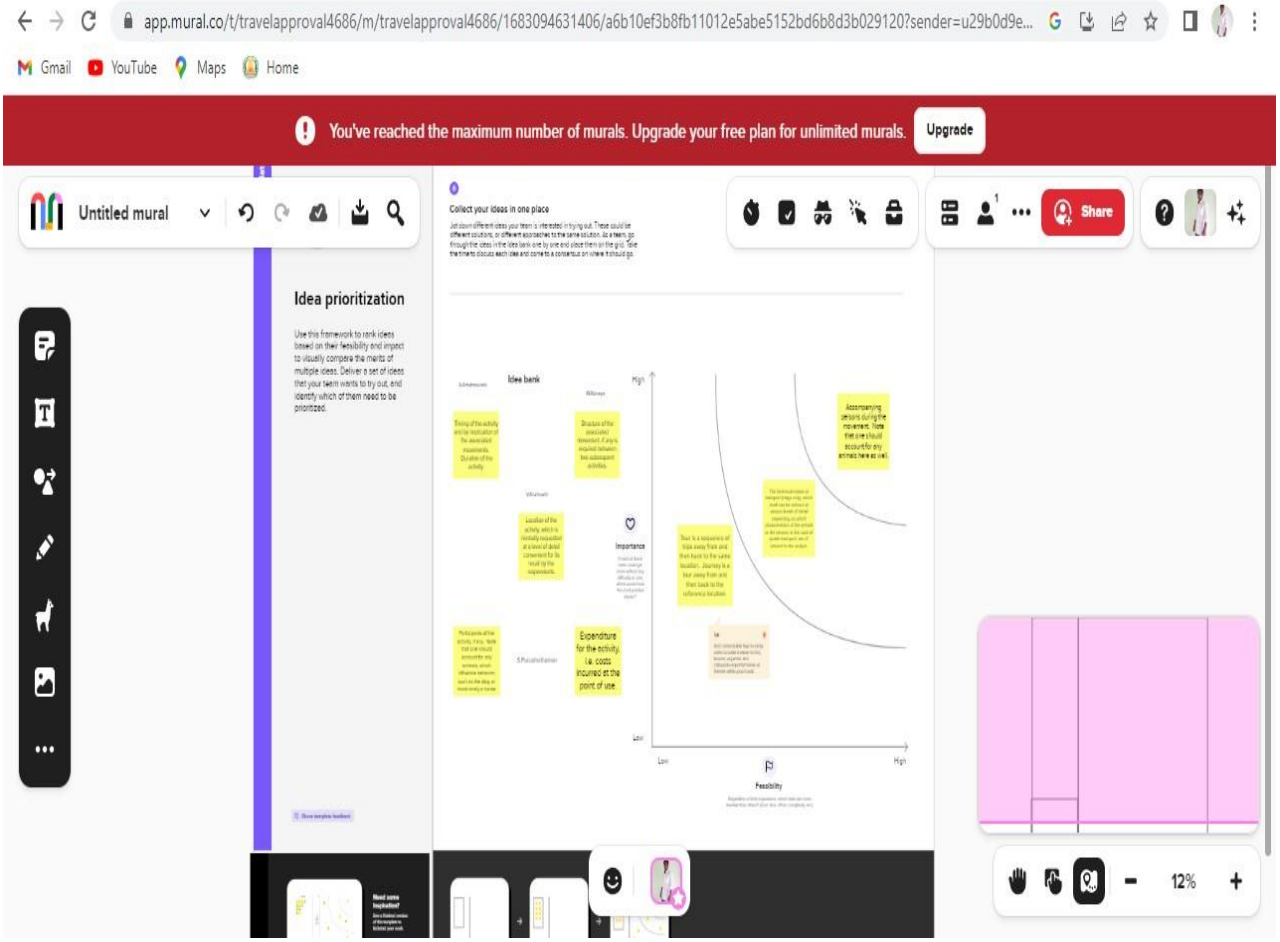
1) create a shared understanding of user needs, and

2) aid in decision making



2.2 Brainstorming :

Brainstorming is a group problem-solving method that involves the spontaneous contribution of creative ideas and solutions. This technique requires intensive, freewheeling discussion in which every member of the group is encouraged to think aloud and suggest as many ideas as possible based on their diverse knowledge.



3. RESULT

3.1 Data Model :

<table>
<tr><th>Object name</th><th>Fields in the object</th></tr>
<tr><td>Student</td><td>
<table>
<tr><td>Field label</td><td>Data type</td></tr>
<tr><td>Travel Approval</td><td>Master – Detail Relationship</td></tr>
</table>
</td></tr>
<tr><td>Student</td><td>
<table>
<tr><td>Field label</td><td>Data type</td></tr>
<tr><td>Expense type field</td><td>picklist</td></tr>
</table>
</td></tr>
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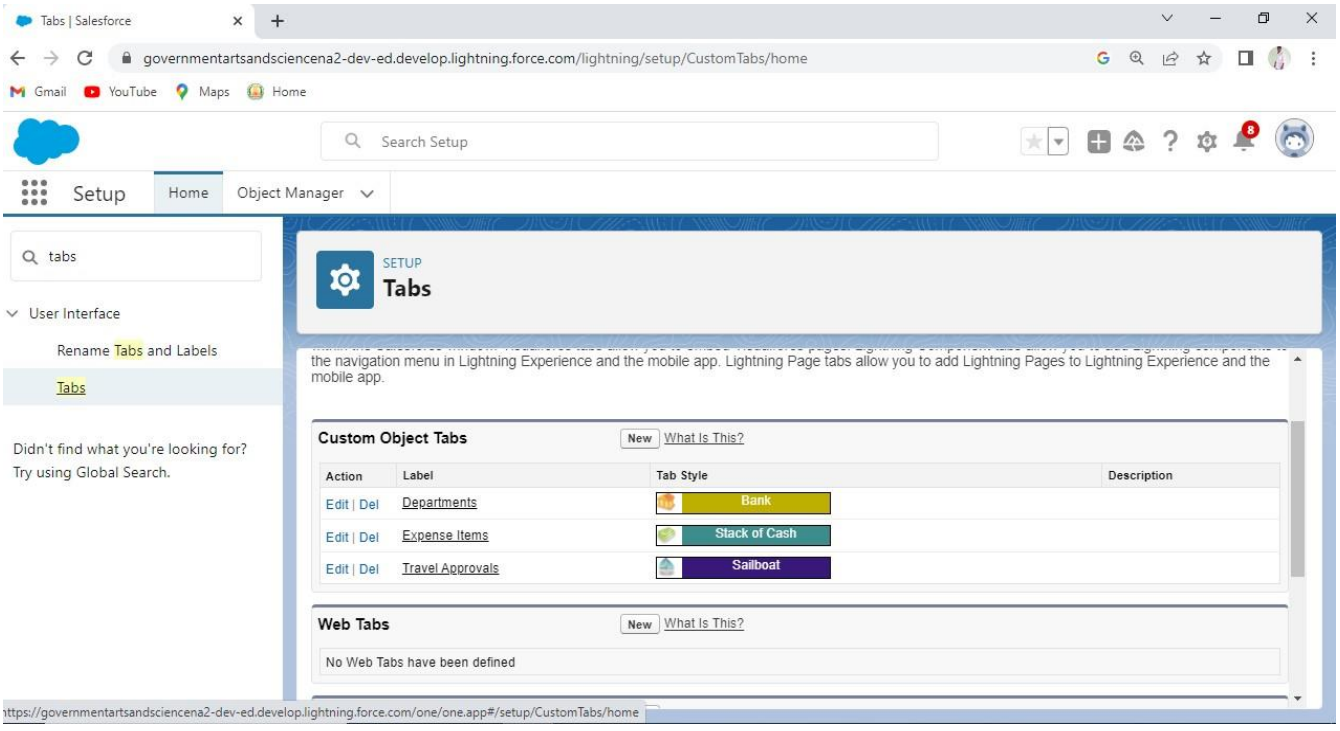
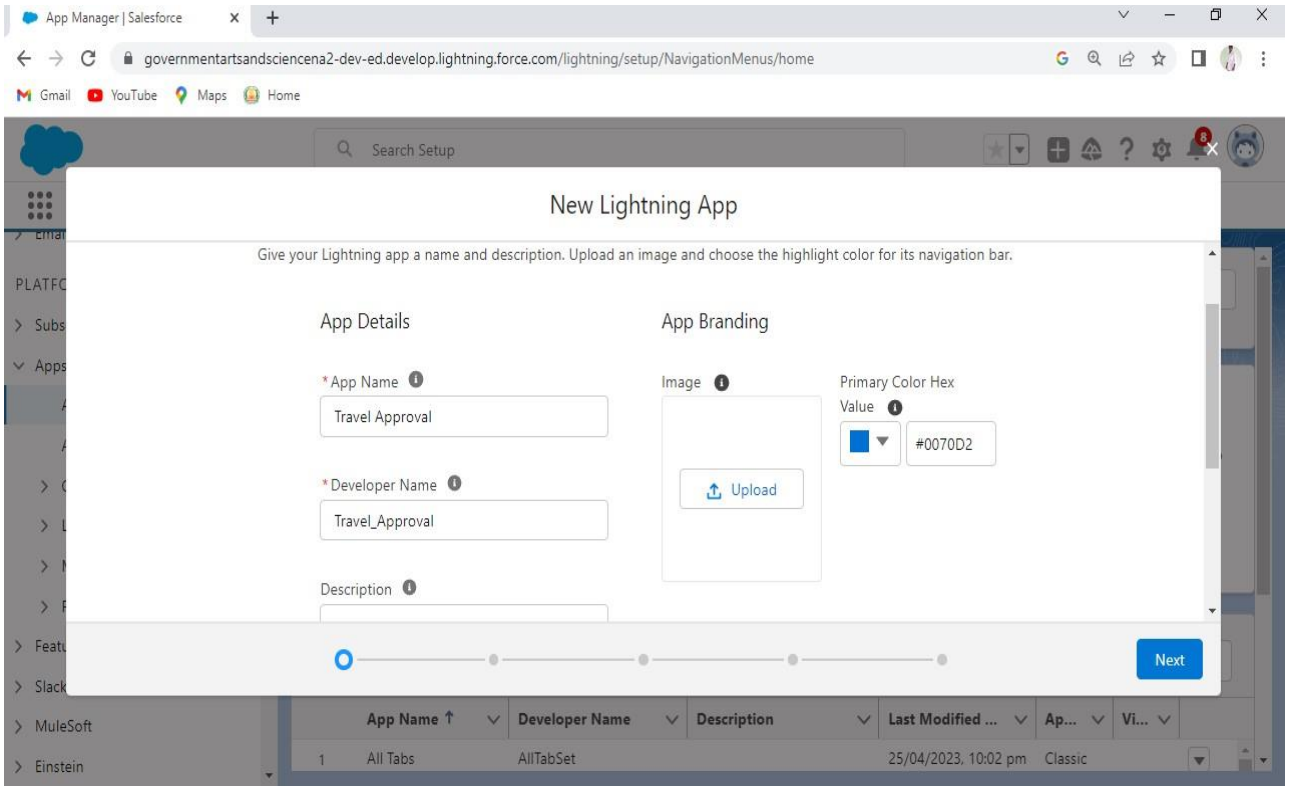
3.2 Activity & Screenshort :

Travel Approval




App Manager | Salesforce
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Gmail
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New Lightning App
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
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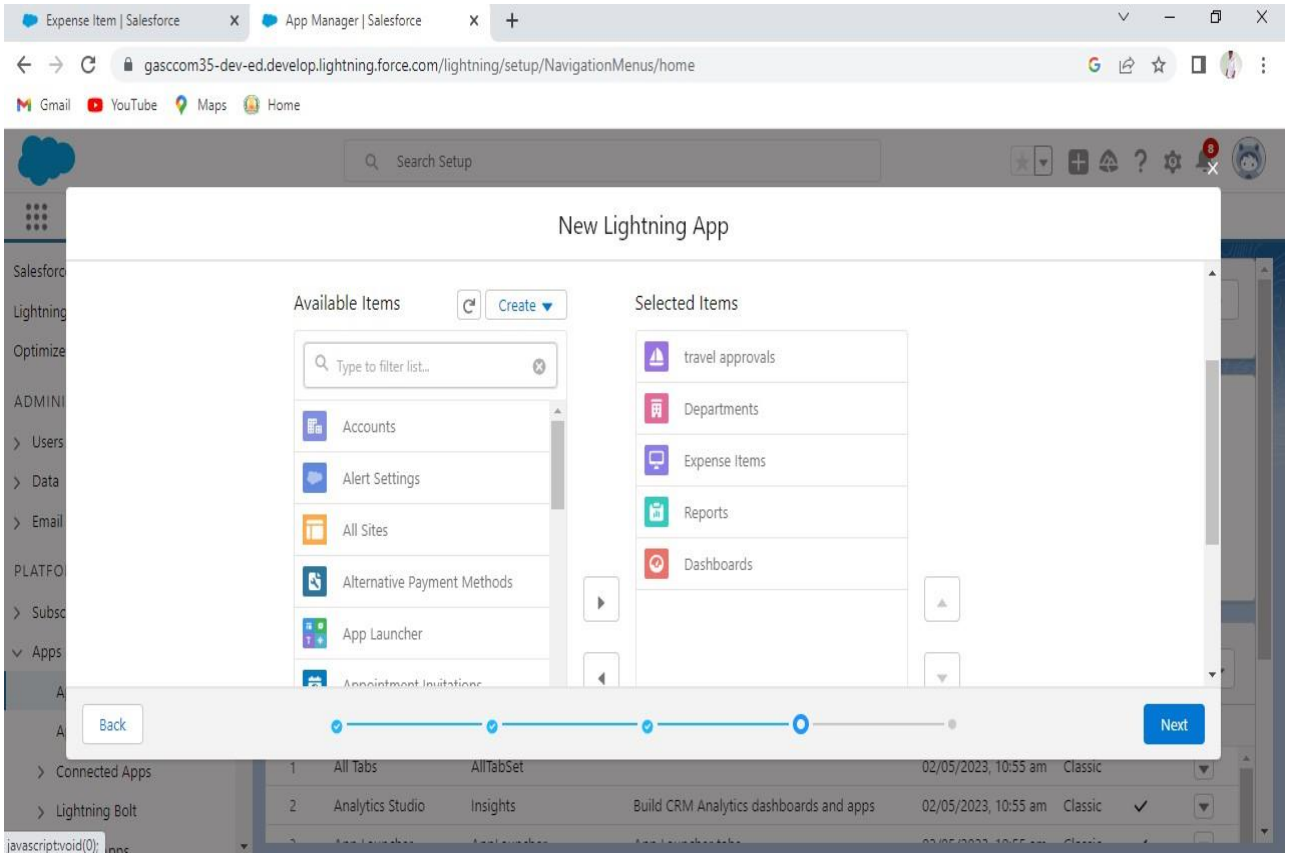
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App Manager | Salesforce
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Type to filter list...
Accounts
Alert Settings
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Alternative Payment Methods
App Launcher
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travel approvals
Departments
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Back
Next
1
All Tabs
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2
Analytics Studio
Insights
Build CRM Analytics dashboards and apps
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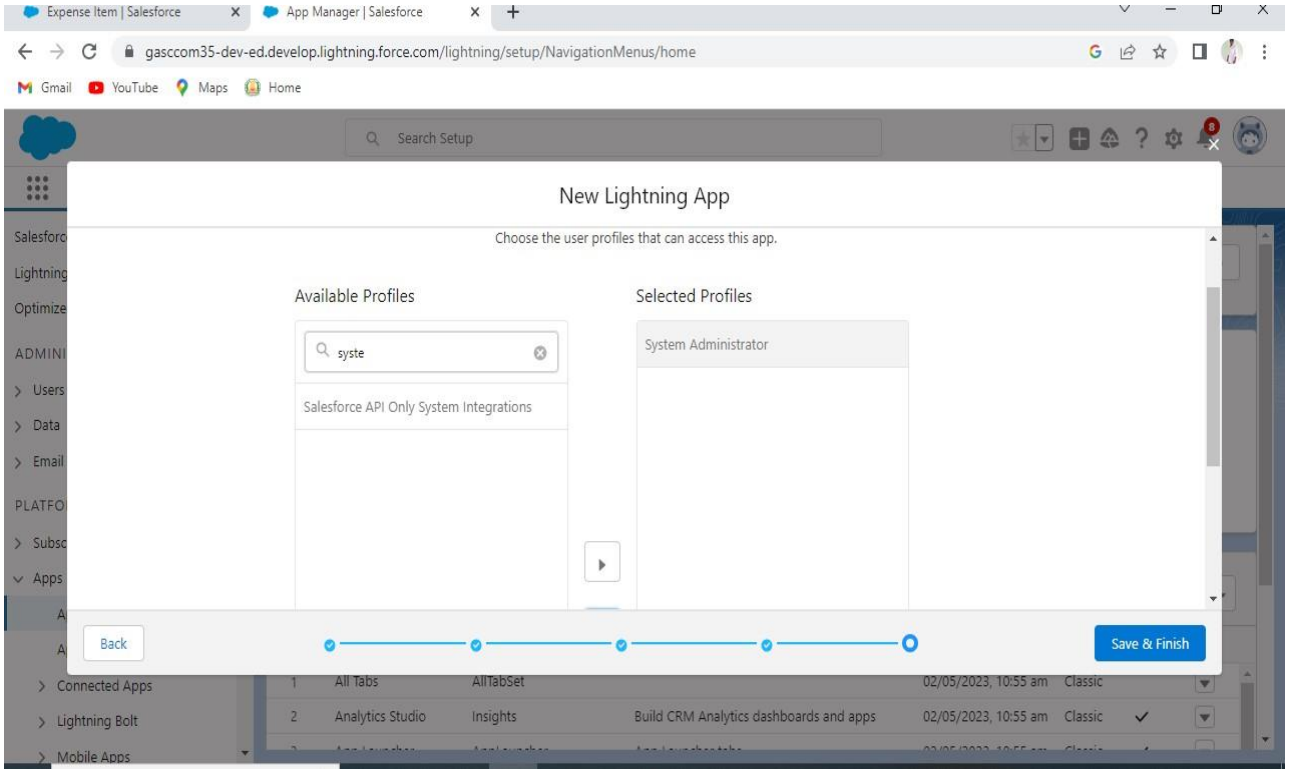
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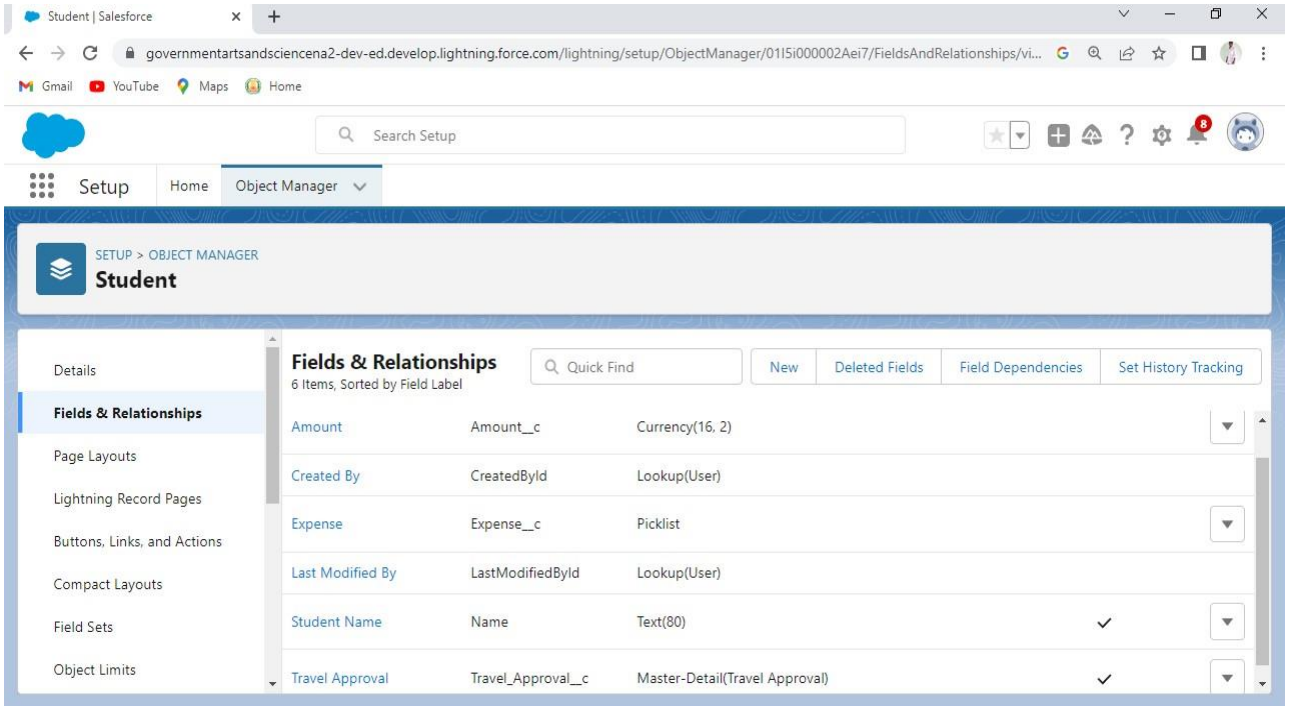
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Object Limits
Fields & Relationships
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Quick Find
New
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Set History Tracking
Amount
Amount__c
Currency(16, 2)
Created By
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Lookup(User)
Expense
Expense__c
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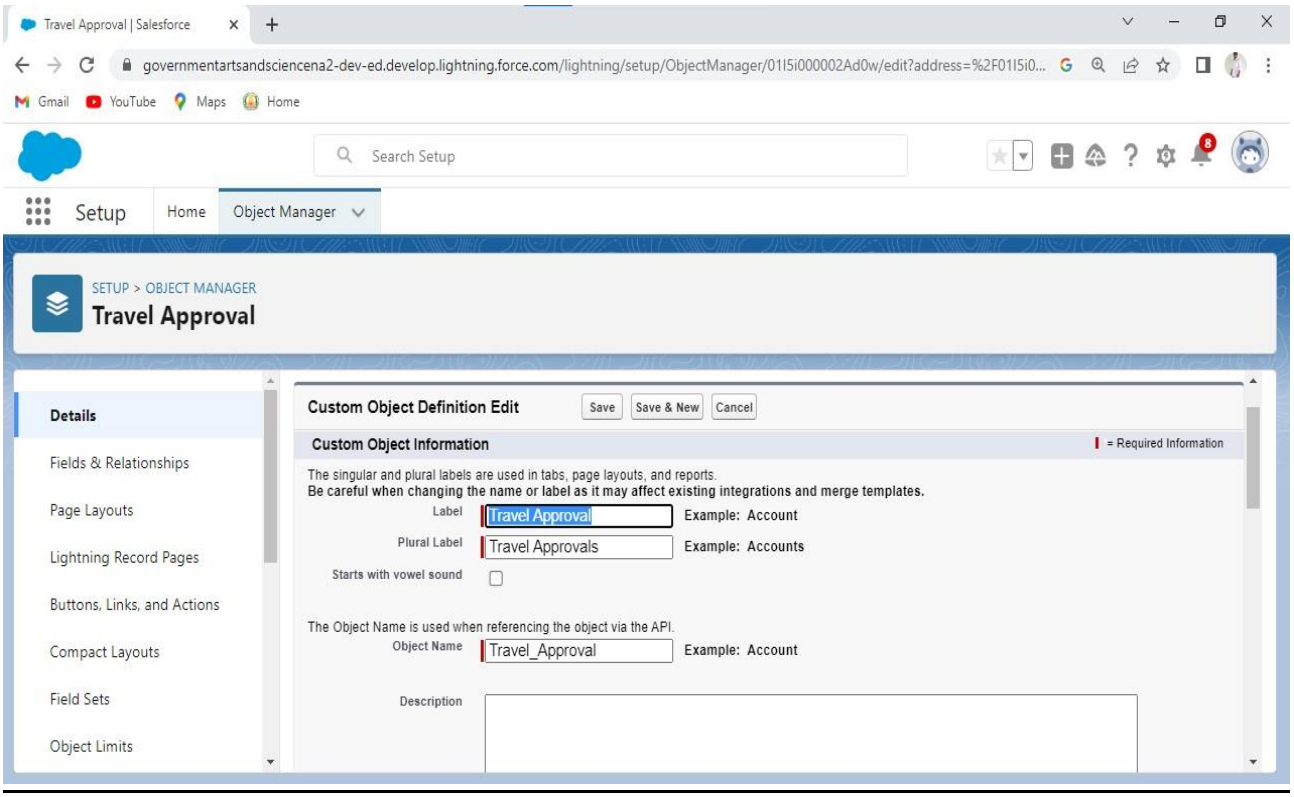
Student Name
Name
Text(80)
Travel Approval
Travel_Approval__c
Master-Detail(Travel Approval)


Travel Approval | Salesforce
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SETUP > OBJECT MANAGER
Travel Approval
Details
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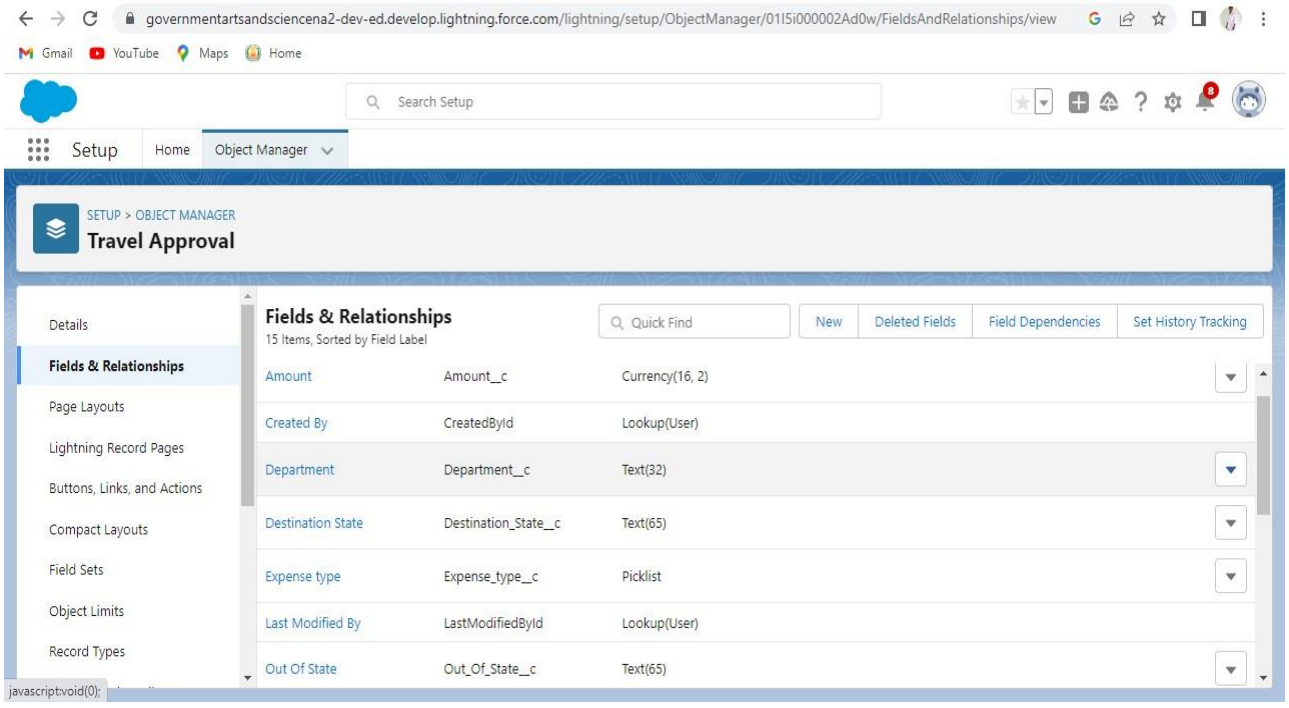
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Travel Approval
Example: Account
Plural Label
Travel Approvals
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Travel_Approval
Example: Account
Description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Travel Approval
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Amount Amount__c Currency(16, 2)
Created By CreatedById Lookup(User)
Department Department__c Text(32)
Destination State Destination_State__c Text(65)
Expense type Expense_type__c Picklist
Last Modified By LastModifiedById Lookup(User)
Out Of State Out_Of_State__c Text(65)
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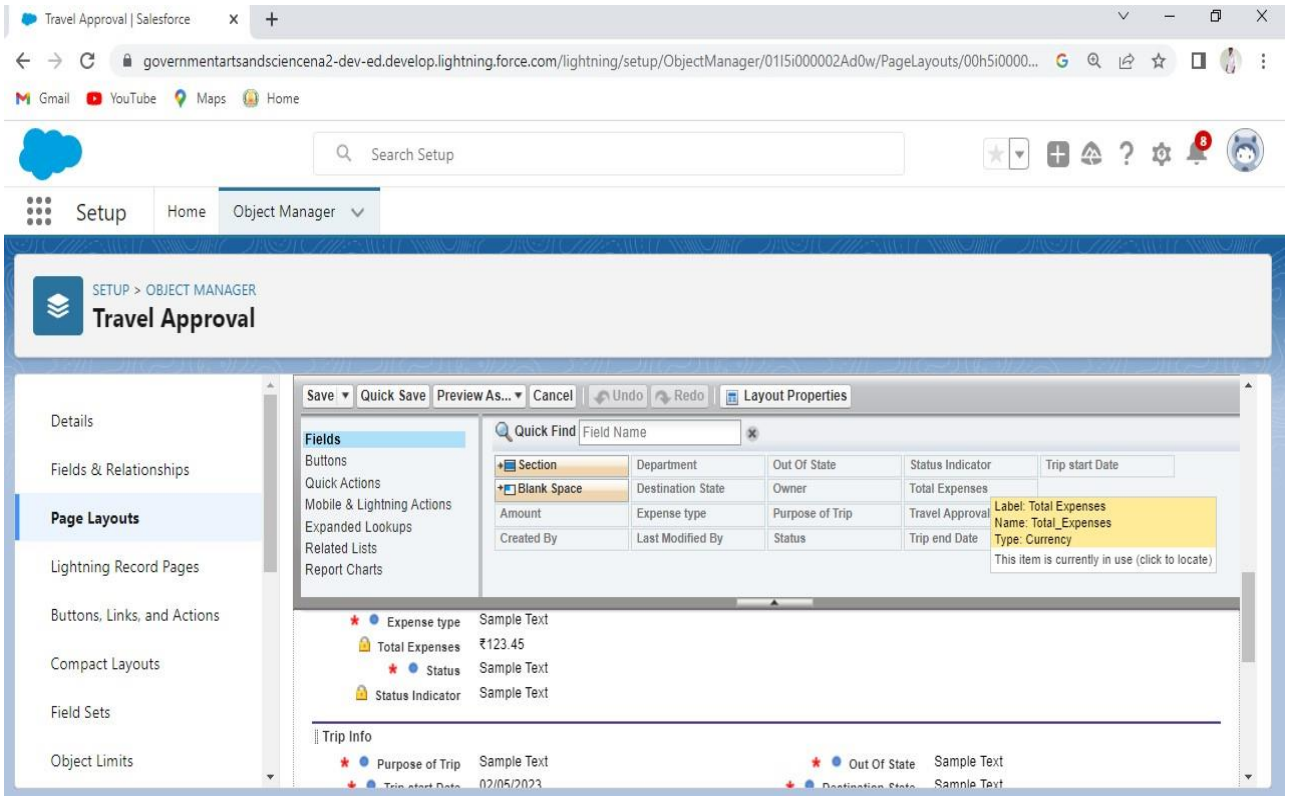
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Status Indicator
Trip start Date
Destination State
Owner
Total Expenses
Amount
Expense type
Purpose of Trip
Travel Approval
Created By
Last Modified By
Status
Trip end Date
Label: Total Expenses
Name: Total_Expenses
Type: Currency
This item is currently in use (click to locate)
Expense type
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Purpose of Trip
Sample Text
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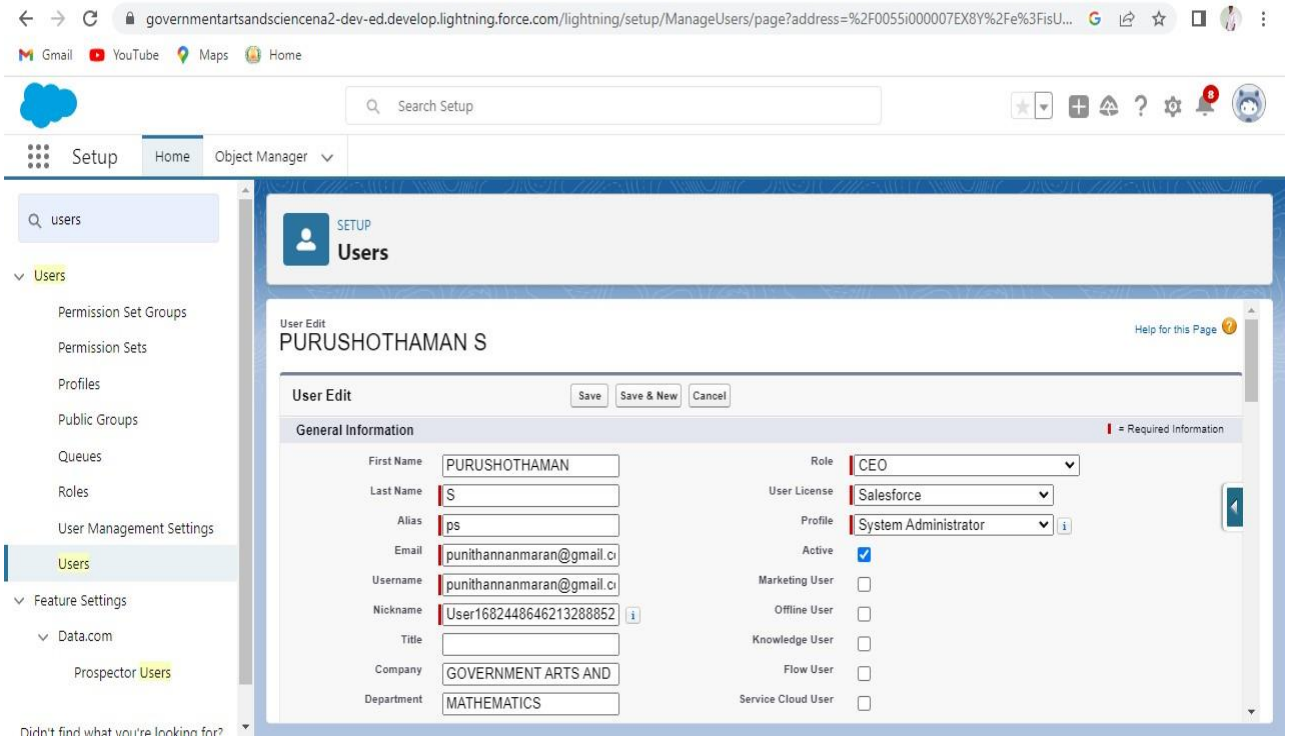
Sample Text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Queues
Roles
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Feature Settings
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SETUP
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User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
PURUSHOTHAMAN
Last Name
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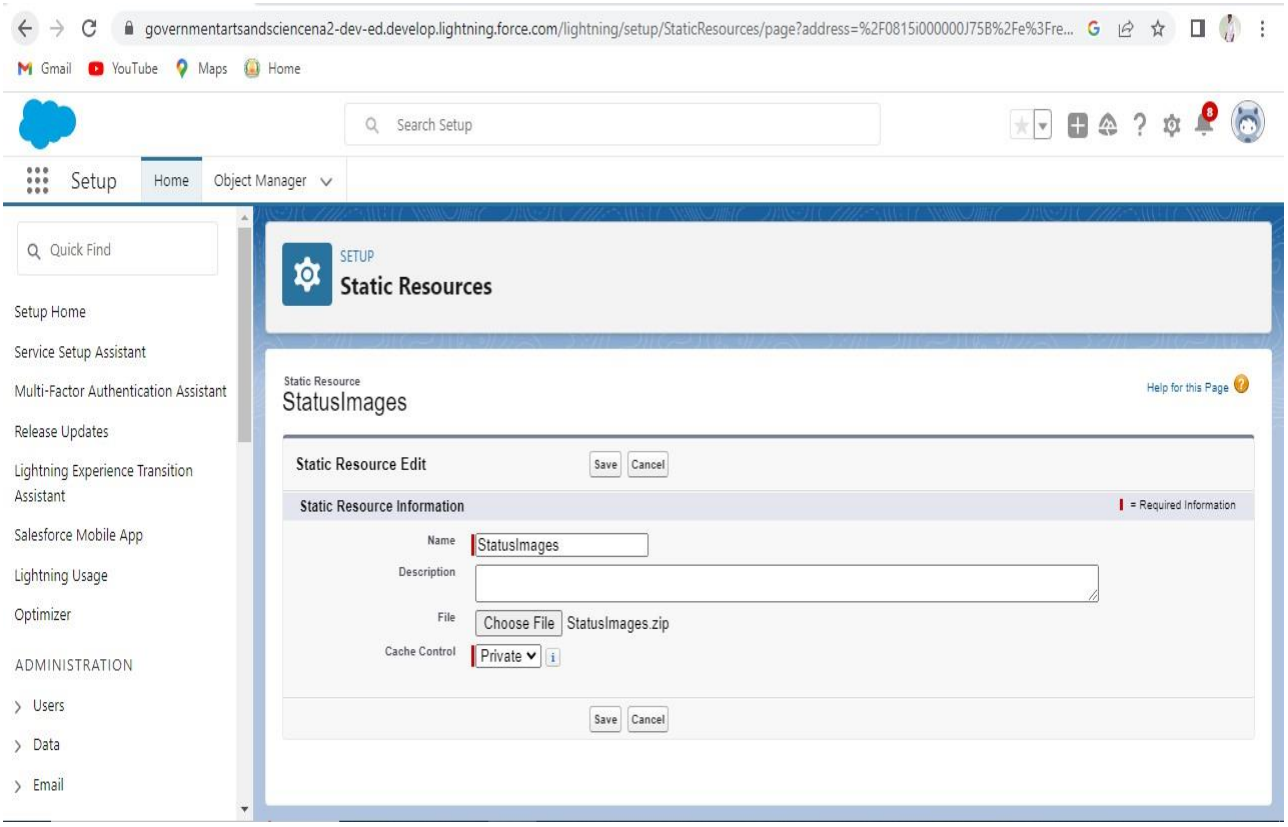
Flow User
Service Cloud User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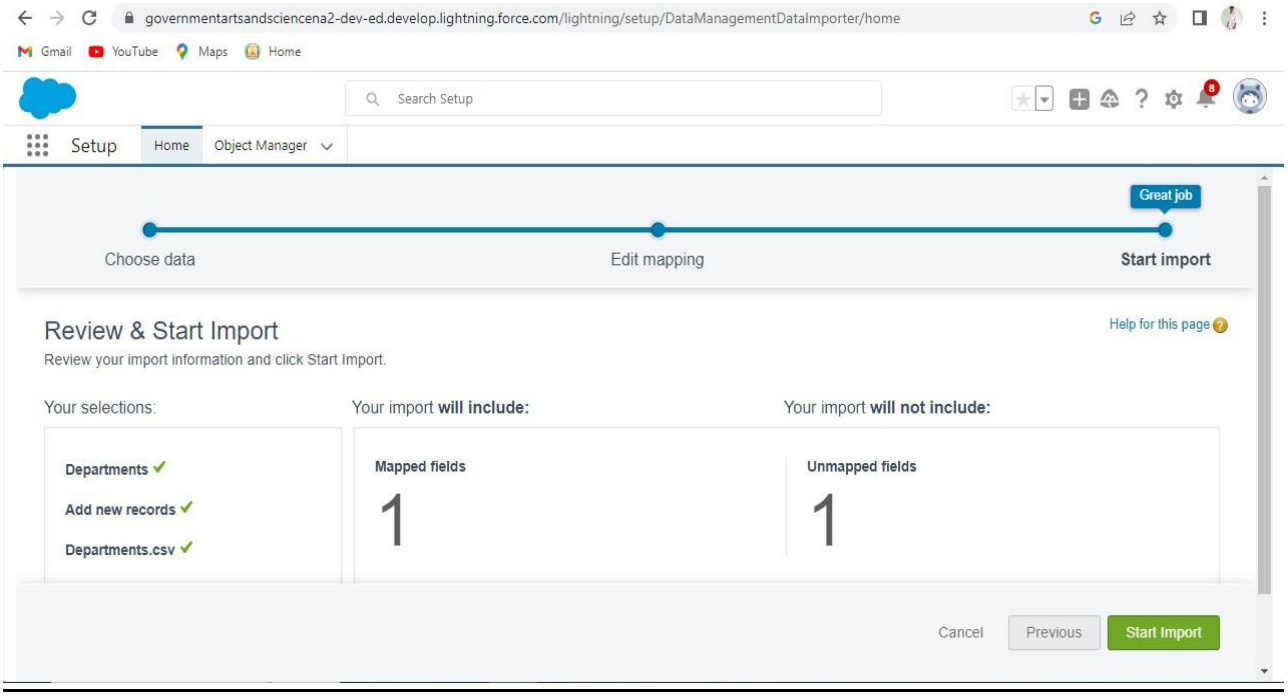
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
SETUP
Static Resources
Static Resource
StatusImages
Help for this Page
Static Resource Edit
Save
Cancel
Static Resource Information
= Required Information
Name
StatusImages
Description
File
Choose File
StatusImages.zip
Cache Control
Private
Save
Cancel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Gmail
YouTube
Maps
Home
Search Setup
Setup
Home
Object Manager
Great job
Choose data
Edit mapping
Start import
Review & Start Import
Help for this page
Review your import information and click Start Import.
Your selections:
Your import will include:
Your import will not include:
Departments
Add new records
Departments.csv
Mapped fields
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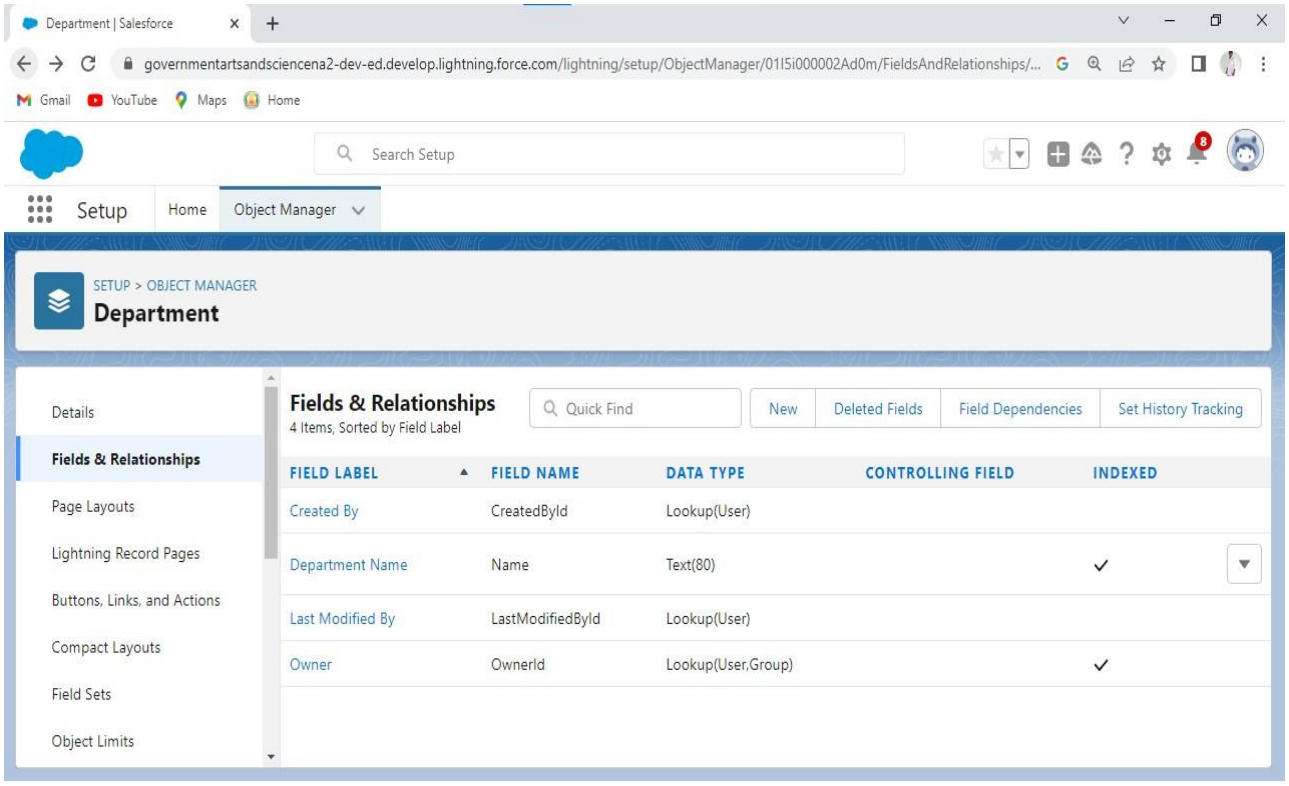
Unmapped fields
1
Cancel
Previous
Start Import

DEPARTMENT



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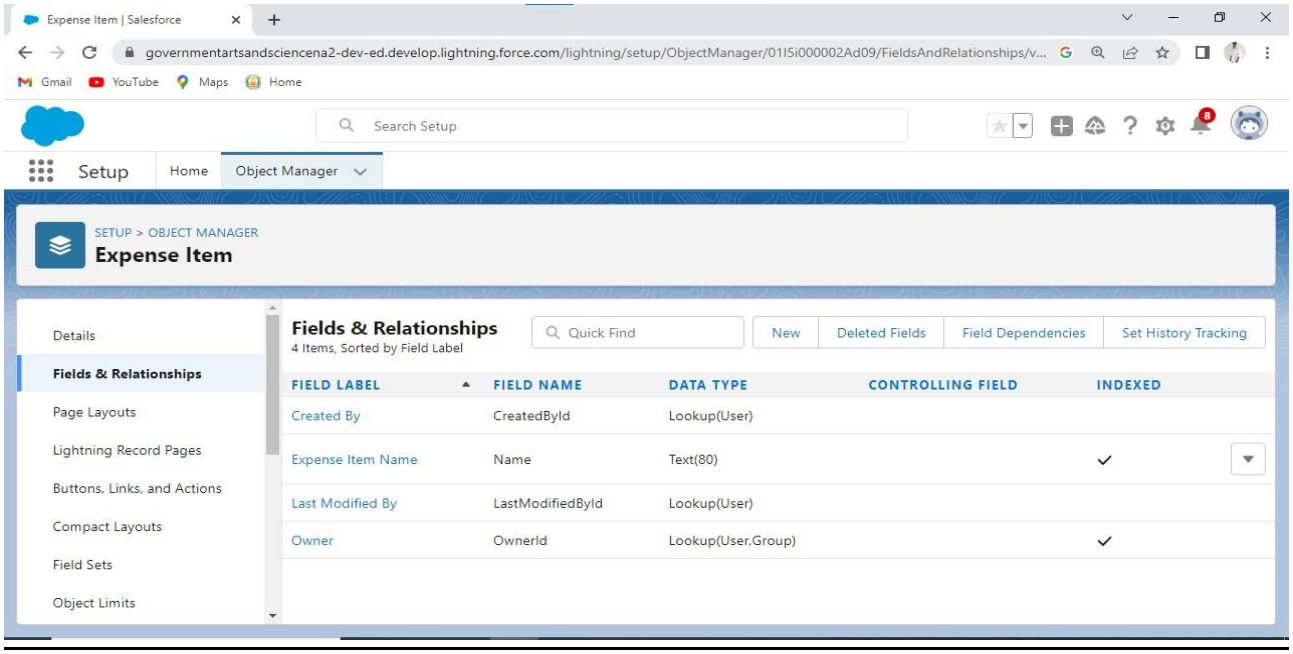
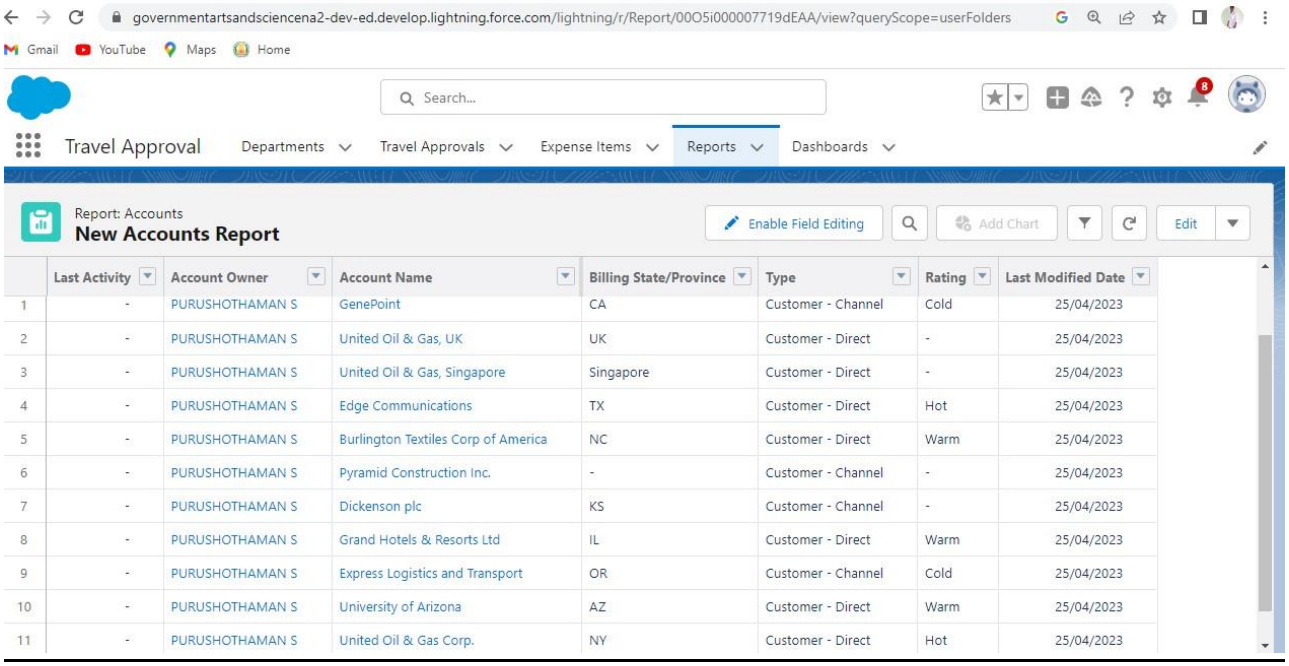


REPORT



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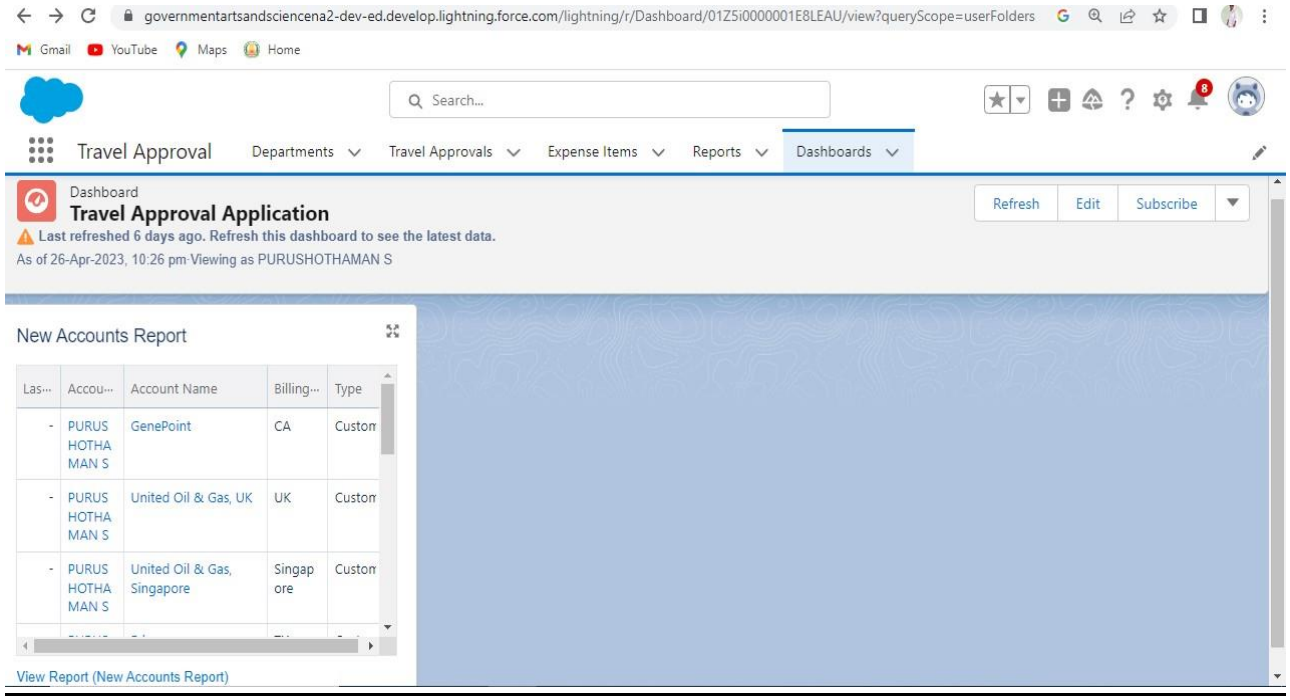
1	-	PURUSHOTHAMAN S	GenePoint	CA	Customer - Channel	Cold	25/04/2023
2	-	PURUSHOTHAMAN S	United Oil & Gas, UK	UK	Customer - Direct	-	25/04/2023
3	-	PURUSHOTHAMAN S	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	25/04/2023
4	-	PURUSHOTHAMAN S	Edge Communications	TX	Customer - Direct	Hot	25/04/2023
5	-	PURUSHOTHAMAN S	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	25/04/2023
6	-	PURUSHOTHAMAN S	Pyramid Construction Inc.	-	Customer - Channel	-	25/04/2023
7	-	PURUSHOTHAMAN S	Dickenson plc	KS	Customer - Channel	-	25/04/2023
8	-	PURUSHOTHAMAN S	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	25/04/2023
9	-	PURUSHOTHAMAN S	Express Logistics and Transport	OR	Customer - Channel	Cold	25/04/2023
10	-	PURUSHOTHAMAN S	University of Arizona	AZ	Customer - Direct	Warm	25/04/2023
11	-	PURUSHOTHAMAN S	United Oil & Gas Corp.	NY	Customer - Direct	Hot	25/04/2023

DASHBOARD



4. TRAILHEAD PROFILE PUBLIC URL

Team Leader	–	S. Purushothaman . H https://trailblazer.me/id/purushoths19
Team Member 1	–	M. Abinaya https://trailblazer.me/id/abinm23
Team Member 2	–	V. Arulmozhi https://trailblazer.me/id/varulmozhi
Team Member 3	–	A. Amuthasurabi https://trailblazer.me/id/aamuthasurabi

Advantages & Disadvantages:

Due to a rapid boom in technology and evolution in business ventures, one has to international corporate travel around the world. Some choose to go on their own and some opt for corporate travel consultant or corporate business travel for assistance to have a comfortable and safe trip.

The motivation can be either incentives, promotion or just traveling but what was once called a business travel, is now more or less a fun solo vacation. The travel expense is mostly covered, the hotel stay is paid for, and all the meals are paid for. However, there is more to traveling than expenses and money.

Here are a few benefits of traveling for work

Meeting new people: On a business trip, it is hard to expect anything because it is a new country, a new language, a new world altogether. It might get a little complicated with the whole new atmosphere, but eventually, you will start meeting so many people with different backgrounds which will provide a sense of oneness even on a business trip. It might as well help you form a long-lasting relationship with a stranger in some other country.

Limited expense traveling: When people get a chance to travel for work, it is mostly an all expense vacation, especially on business. Expenses covered would include the hotel costs, all the meals (breakfast, lunch, and dinner) for a period of time. Not many get an all-expense business trip, but you are one such executive, cheers.

Unfortunately, with the benefits come the downsides. Work can get to you; time and money can bother you; jetlags, unhealthy food and stay, just to name a few can get on your nerves when everything is on a tight schedule.

Here are a few disadvantages of traveling:

Sleeping: Jetlags can be one of the reasons, but not everyone is blessed to sleep everywhere and anywhere. Staying awake in the hotel room is one of the common traits of a business traveler. Be it a for a short or long business trip, it does take some time to get accustomed to the time zones.

Stay: Unless and until the business trip is planned through a corporate travel consultant, finding the right hotel room will be a challenge.

From a travel perspective, the benefits by far outweigh the downsides. But again it depends on where, why and how you are traveling to other countries. Although, if you are offered an all-expense paid opportunity to travel for a week or two, I'd recommend taking advantage of the opportunity.

Applications:

This tutorial explains how to use the travel approval sample application.

The Travel Support System (this is the name that you can see on the screen when executing the application) is a small sample application for NaturalONE. As a sample application, its focus is to show NaturalONE functionality rather than being a full-fledged travel support application.

The Travel Support System (TSS) allows you to request and approve business trips. Flights, hotels and even more external information such as cell phone expenses or car rentals can be entered with the trip request. For the destination, weather information can be queried. A manager can do both, request own trips as well as approve trips that have been requested by employees. After the manager has approved single or multiple requests, the manager can print an itinerary or receive the itinerary as a PDF file.

Conclusion:

In this project we learnt about,

- To create custom objects
- To create field and relationships
- To create tabs
- To create import departments
- To create customize user interface
- Use customization
- To create validation rule
- Roll up summary fields
- Reports and dashboards

Future Scope:

The Scope of Travel agencies in the futures is likely to change due to several factors, including the on going covid 19 pandemic and the growth of online travelbooking platform .

Many travel agencies have to had to adapt their business models to focus an online bookings virtual tours, and some have closed permanently.

However there is still a market for travel agencies that specialize in niche areas,such as luxury travel or adventure travel.

According to international data corporation , the salesforce economy is set tocreate 1.9 million direct and indirect job by 2024 .

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