

PROJECT REPORT

CREATING A TRAVEL APPROVAL APPLICATION FOR CORPORATES

1. INTRODUCTION

1.1 Overview

Project Name: Creating a Travel Approval Application for the corporates.

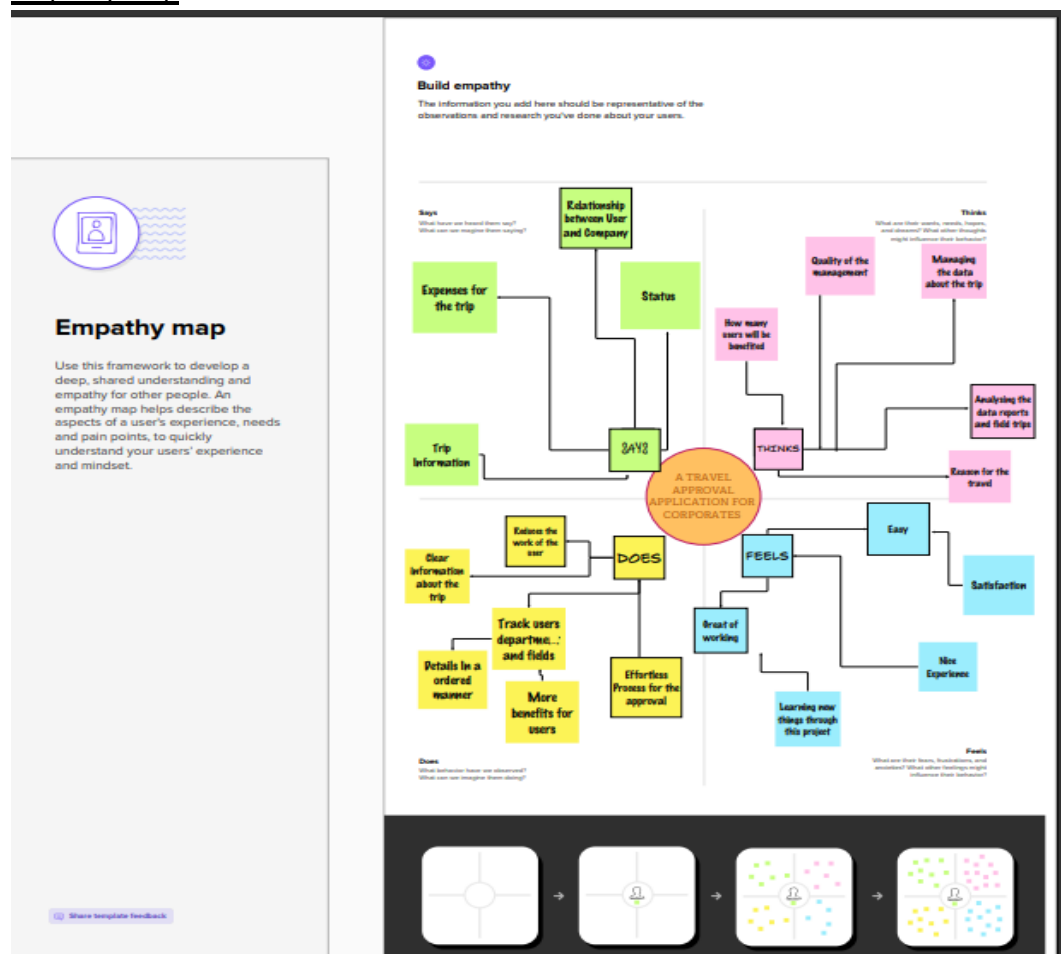
Creating a travel approval application for the employees and the approval process involved in the project. This project helps in sending travel request in place of emails

1.2 Purpose

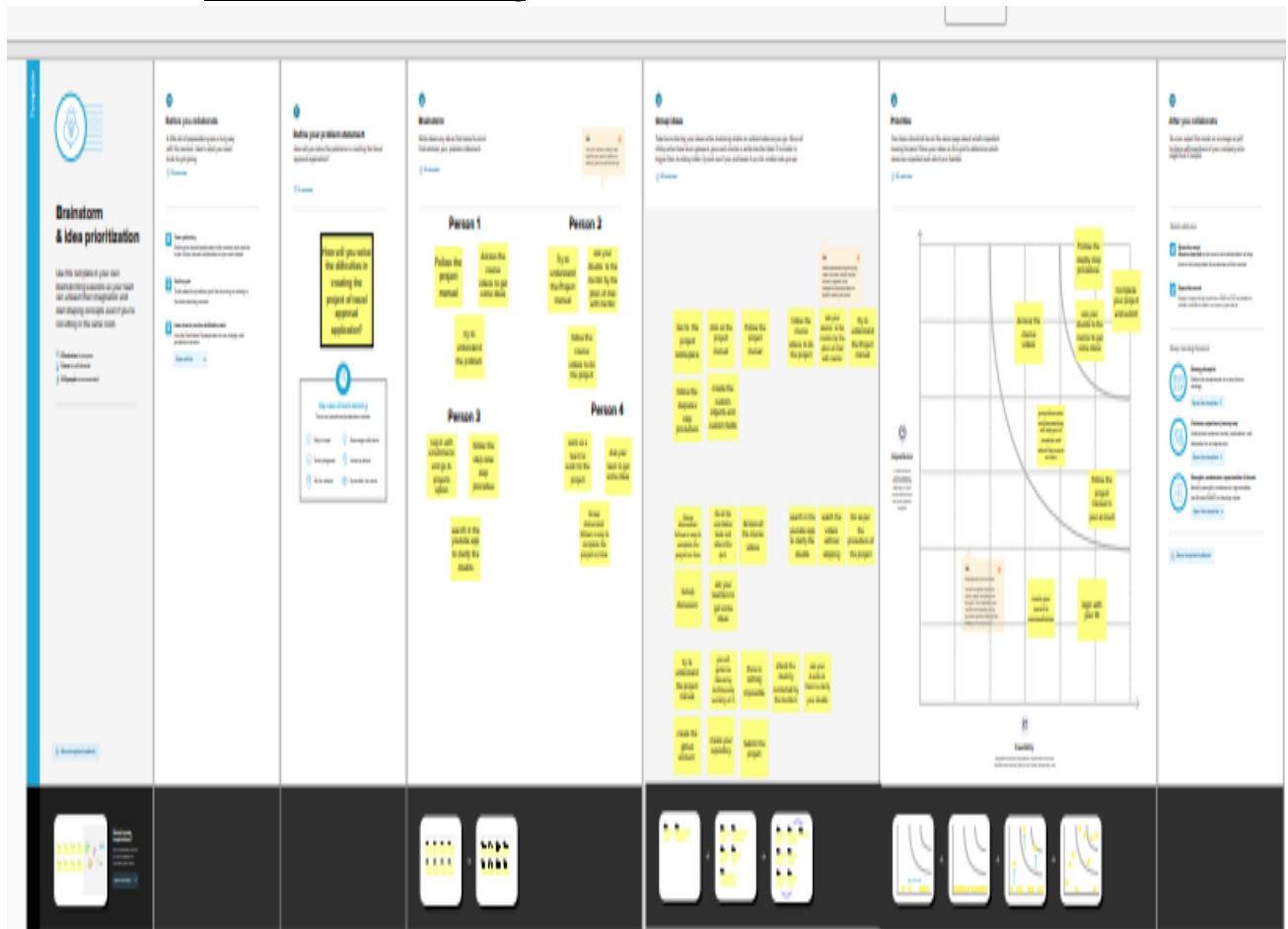
The main purpose of this project is to verify the status of the travel request and helps in approving the travel request for the employees

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Ideation and Brainstorming



3. RESULT

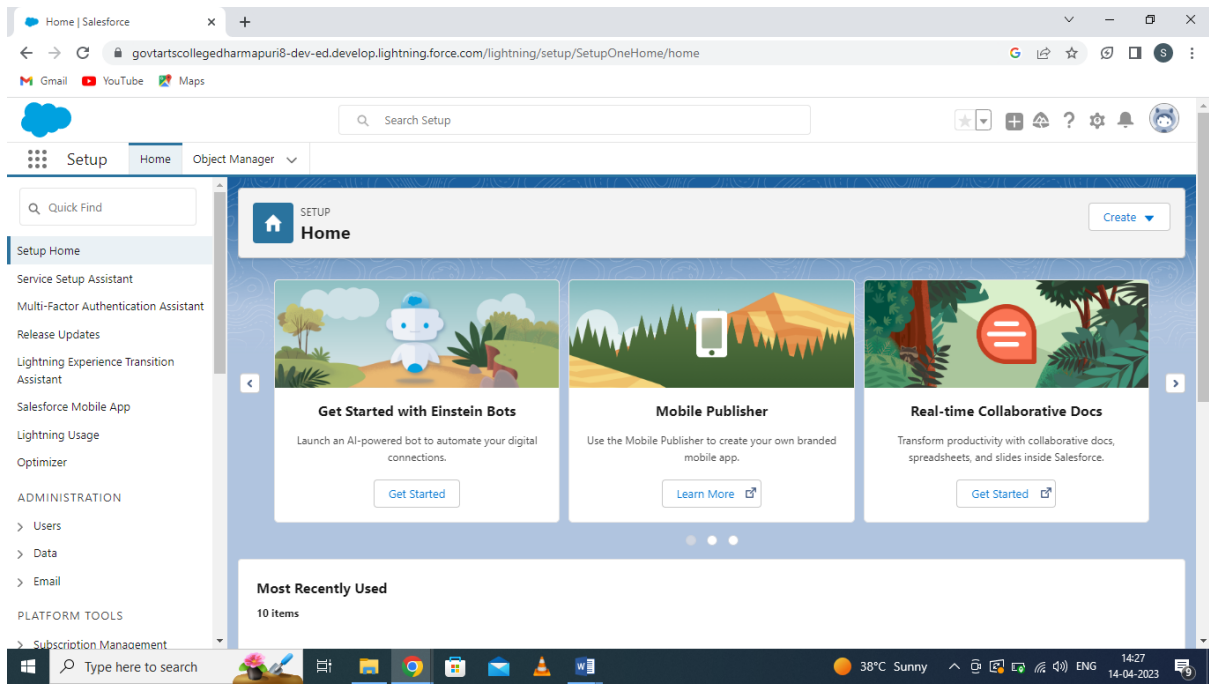
3.1 Data Model:

Object Name	Fields in the Object	
Travel Approval Object	Field Label	Field Type
	Purpose of trip	Text area
	status	picklist
	Trip start date	Date
	Trip end date	date
	Out of state	Checkbox
	Destination state	text
	Department	Lookup Relationship
Expense Items	Field Label	Field Type
	Amount	Currency
	Expense Type	Picklist
	Travel Approval Field	Master Detail Relationship
Department Object	Field label	Field type
	Department code	Text

3.2 Activity & Screenshot

Milestone :1

Creating my Developer Account & Activate my Account



Go to developers.salesforce.com

Click on sign up

On the signup page enter the required details.

Company name should be your college name and Username should be a combination of your name and company in the format of shaliniarts@organization.com

Next login to your salesforce account

Go to [salesforce .com](https://salesforce.com) and click on Login.

Enter the username and password that you just created.

After login you will see the above page which you have seen.

MILESTONE 2:

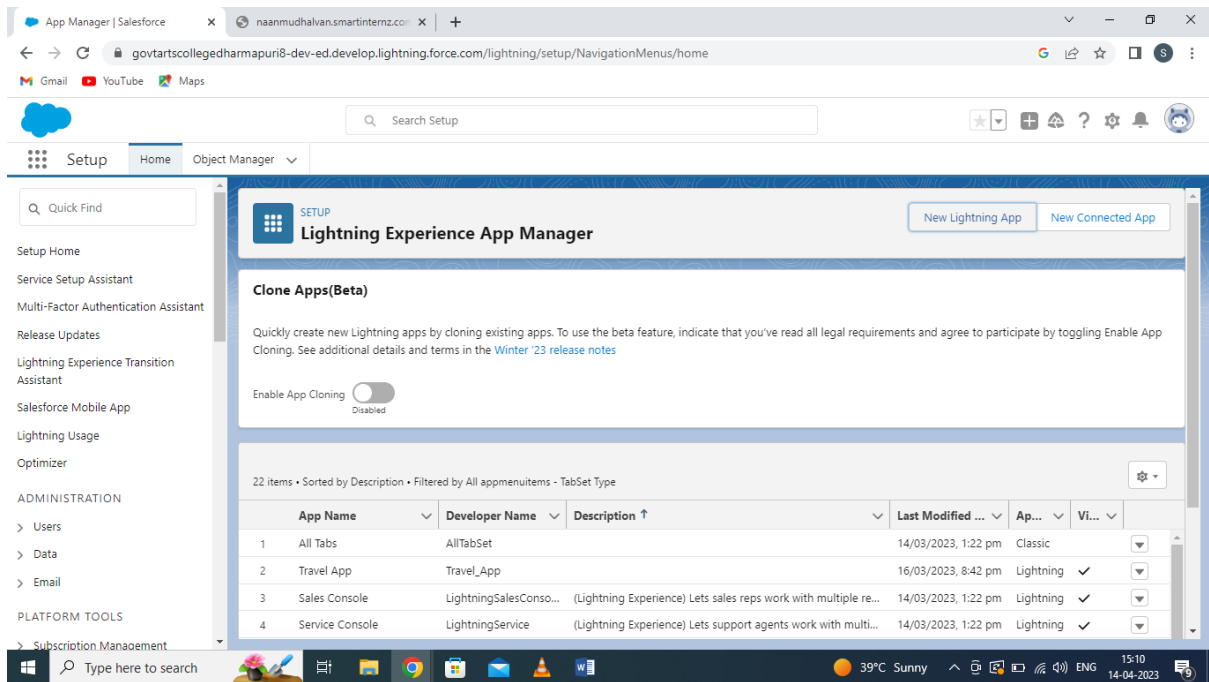
Creation of Travel Application

First You have to download this zip file

<https://developer.salesforce.com/files/TravelAppWorkshopFiles.zip>

Steps

From the setup page enter App manager in the Quick find box and select the App Manager



Click on new lightning app and enter the app name as Travel Approvals.

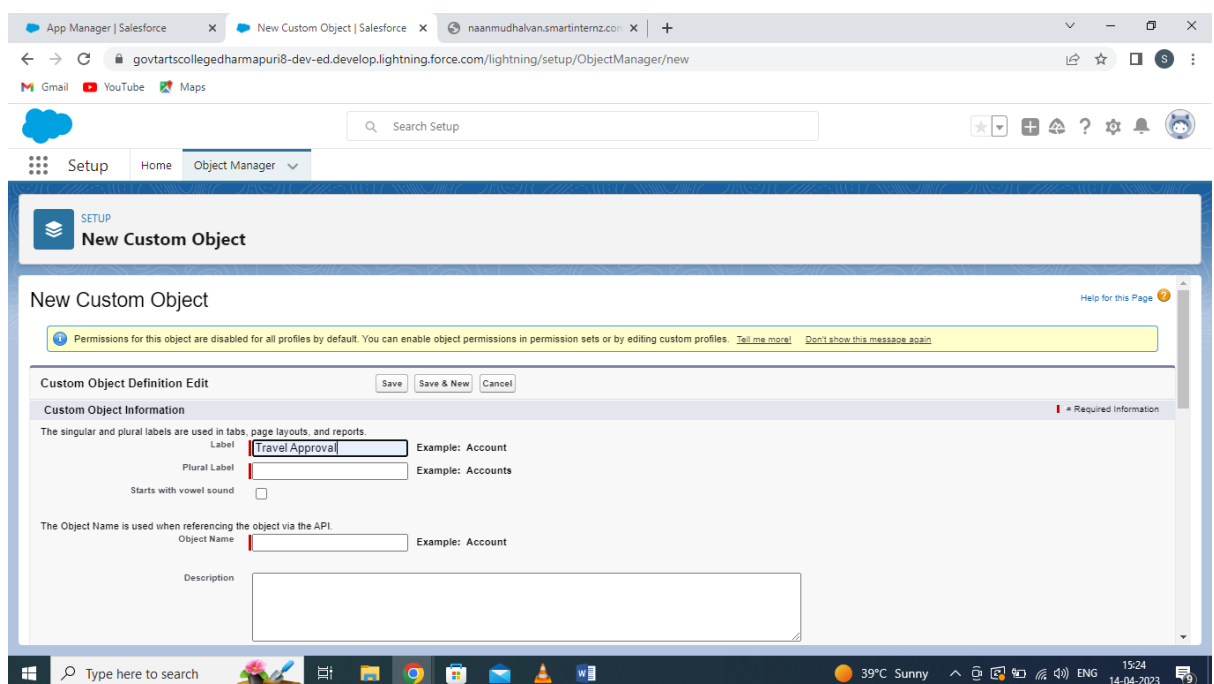
Under app options and utility items leave the default settings click next.

Under Available items select department. Travel approval, Expense item, reports and dashboards and click next and click finish.

MILESTONE 3:

Creating custom objects and tabs

- Department
- Travel Approval
- Expense item



Click on object manager and click on custom object.

Enter the field label and required details as per your project manual and click on save.

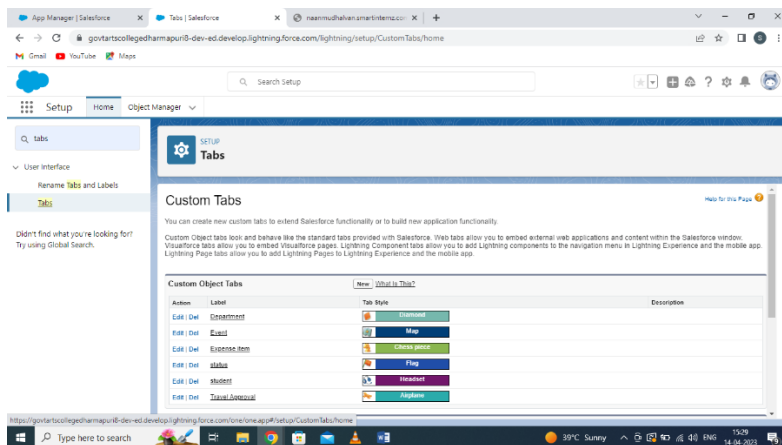
MILESTONE :4

Creation of custom tabs for custom objects

Click on home tab.

Search for tabs in Quick find and select tabs.

For tab style select any one and click on save



MILESTONE: 5

Creating Fields and Relationships

Fields in travel approval object:

Field Label	Field Type
Purpose of trip	Text area
Status	picklist
Trip start date	Date
Trip end date	date
Out of state	Checkbox
Destination state	text
Department	Lookup Relationship

Travel Approval | Salesforce

govtartscollegedharmapuri8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003bkj0/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Travel Approval

Details

Fields & Relationships
14 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department	Department__c	Lookup(Department)		✓
Destination State	Destination_State__c	Text(2)		
Last Modified By	LastModifiedById	Lookup(User)		
Out of State	Out_of_State__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓
Purpose of Trip	Purpose_of_Trip__c	Text Area(255)		

Type here to search

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Fields In Expense Item Object:

Expense item | Salesforce

govtartscollegedharmapuri8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003bnHq/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Expense item

Details

Fields & Relationships
6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Expense item	Expense_item__c	Picklist		
Expense item Name	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Travel Approval	Travel_Approval__c	Master-Detail(Travel Approval)		✓

Type here to search

34°C Haze 20:26 13-04-2023

Expense Items

Field Label	Field Type
Amount	Currency
Expense Type	Picklist
Travel Approval Field	Master Detail Relationship

Fields in Department Object:

Department Object	Field label	Field type
	Department code	Text

The screenshot shows the Salesforce Setup interface for the 'Department' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a list of 5 items, sorted by Field Label. The list includes fields like 'Created By', 'Department Code', 'Department Name', 'Last Modified By', and 'Owner'. The 'Department Code' field is highlighted in blue. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The 'Department Code' field has a data type of 'Text(18) (Unique Case Sensitive)' and is indexed. The 'Department Name' field has a data type of 'Text(80)' and is indexed. The 'Owner' field has a data type of 'Lookup(User, Group)' and is indexed. The 'Created By' and 'Last Modified By' fields have a data type of 'Lookup(User)'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department Code	Department_Code__c	Text(18) (Unique Case Sensitive)		✓
Department Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓

MILESTONE: 6

Import Departments

First you need to download the reference file

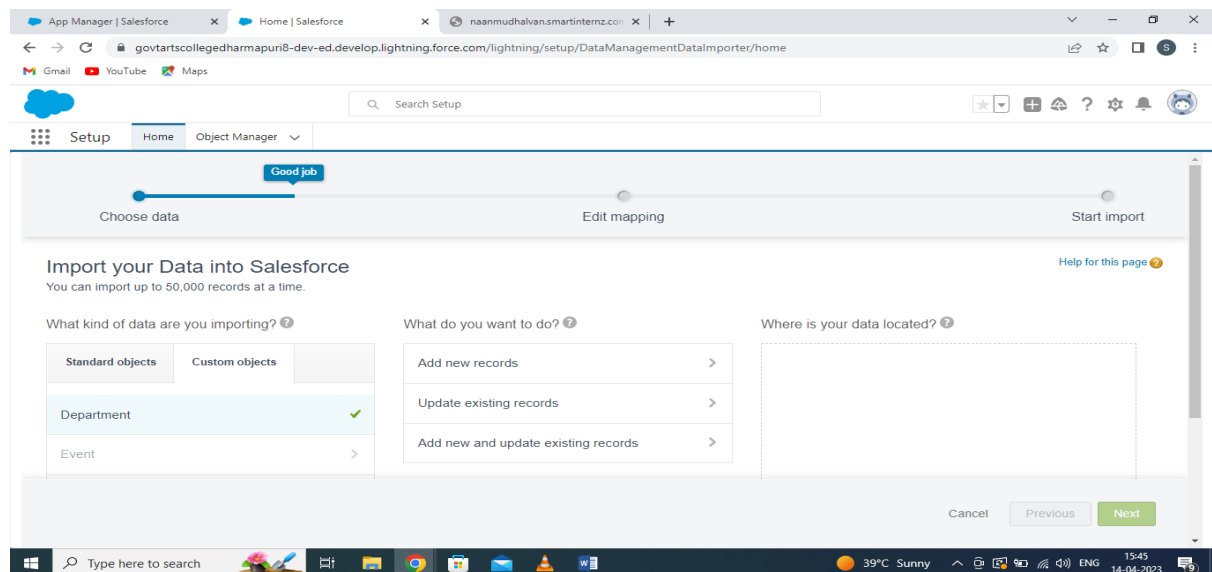
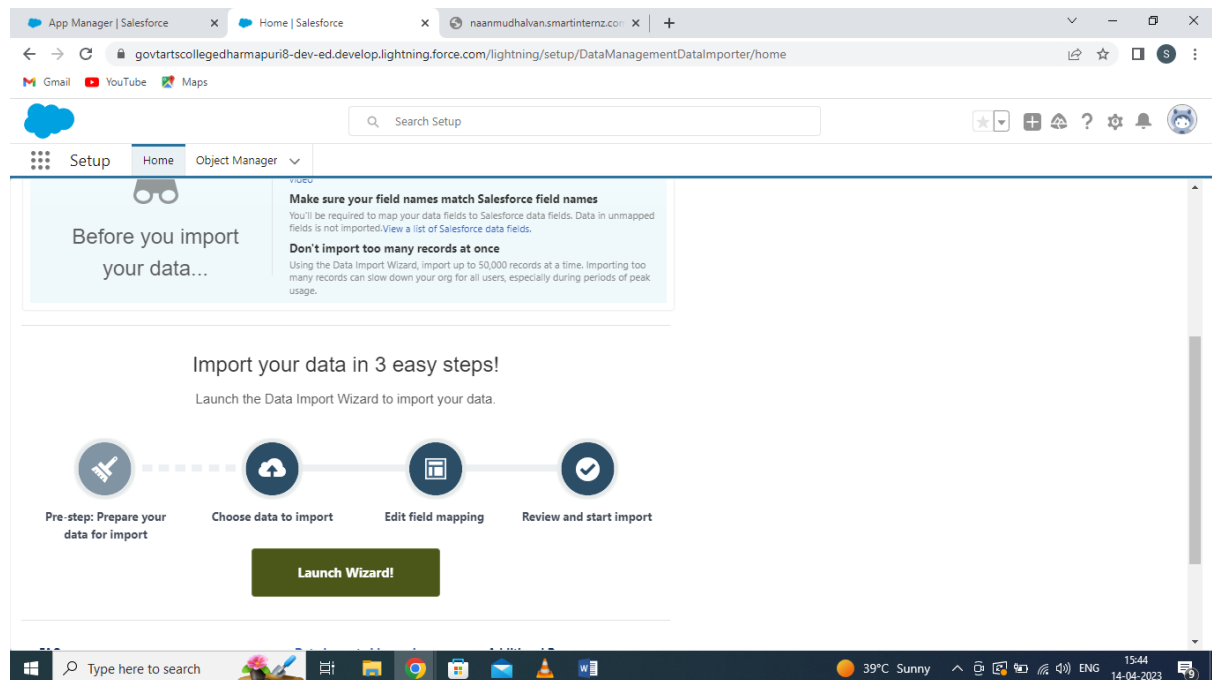
<https://developer.salesforce.com/files/travelappworkshopfiles.zip>

Click on home page and search for data import wizard in the quick find box and click on data import wizard.

Click on Launch wizard.

Click on custom objects.

Click on Department and import department file in CSV file.



MILESTONE: 7

Customization of User Interface

Create user and Set Up Approvals

Enter username in the quick find box and select users

Click new user.

For username follow the instructions **First name<Your last name>@our Company>.com**

The email must be real.

Give the role as CEO, Profile as system administrator and license as salesforce.

Set your manager as approver.

Click save.

MILESTONE: 8

Creating Travel approval object page layout

The screenshot shows the Salesforce Setup interface for creating a page layout for the Travel Approval object. The browser address bar indicates the URL: `govtartscollegedharmapuri8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003bkj0/PageLayouts/00h2w00000152ZNAAZ/view`. The Setup menu is open, showing the navigation pane on the left with options like Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area displays the 'Travel Approval Layout' configuration. It includes a 'Fields' section with a 'Quick Find' box and a list of fields: Section, Blank Space, Destination State, Purpose of Trip, Total Expenses, Last Modified By, Record Type, Travel Approval #, Created By, Out of State, Status, Trip_Start_Date, Department, Owner, Status Indicator, and Trip End Date. Below the fields section, there is a 'Travel Approval Sample' section, a 'Highlights Panel' with a placeholder for customization, and a 'Quick Actions in the Salesforce Classic' section with a 'Publisher' button. The bottom of the screen shows the Windows taskbar with the search bar, task view button, and various application icons, along with system information like 34°C Haze and the date 13-04-2023.

From the object Manager , Search for the travel approval object and click edit.

Click on page layout and click edit.

Drag section from the top of the pane to the lower pane directly below the Information section.

When you dragging over the page you get a visual indicator of where you can drop the new section.

Name the section Trip Info.

Drag purpose of the trip field, Trip start Date, Trip End Date, Out of state, Destination State and Department Field.

Click on Save.

MILESTONE: 9

Add A Business Logic To Travel App

Create the validation rule:

In the object manager click on the travel approval object and click on validation rule.

In the error condition formula enter `Trip_end_Date__c<Trip_Start_Date__c`.

For error location select field and pick trip end date as the location error.

Create Rollup Summary Fields

Create a new Total Expenses field in Travel approval object.

Select the data type as Roll up summary data type.

Configure the roll up calculation:

Summarized object: Expense items

Roll up Type: SUM

Field to aggregate: Amount

Field Criteria: All records should be included in the calculation.

Click next click save.

Create the Formula fields:

First we need to upload the StatusImages.zip

Click custom code | Static Resources

Click New.

Name: StausImages

File: StatusImages.zip

Cache Control: Private

Now select the travel approval object.

Create a new field. select formula data type.

Field label as Status Indicator and Formula return type as text.

Copy and paste the following formula in the formula editor.

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)))

Click Next , Next save.

MILESTONE:11

Reports

Click on new report.

Select Report Type from category and customize your report then save or run it

The screenshot shows a Salesforce Lightning interface. At the top, there's a navigation bar with 'Travel App' and various dropdown menus. Below that, a 'Travel Approval' report titled 'Recently Viewed' is displayed. The report shows a list of 12 items, each with a checkbox and a 'Travel Approval #' field. The items are numbered 1 through 12, with corresponding approval numbers like TA-00009, TA-00011, etc. The interface includes a search bar, filters, and a table view. The bottom of the screen shows a Windows taskbar with various application icons and system information like temperature and time.

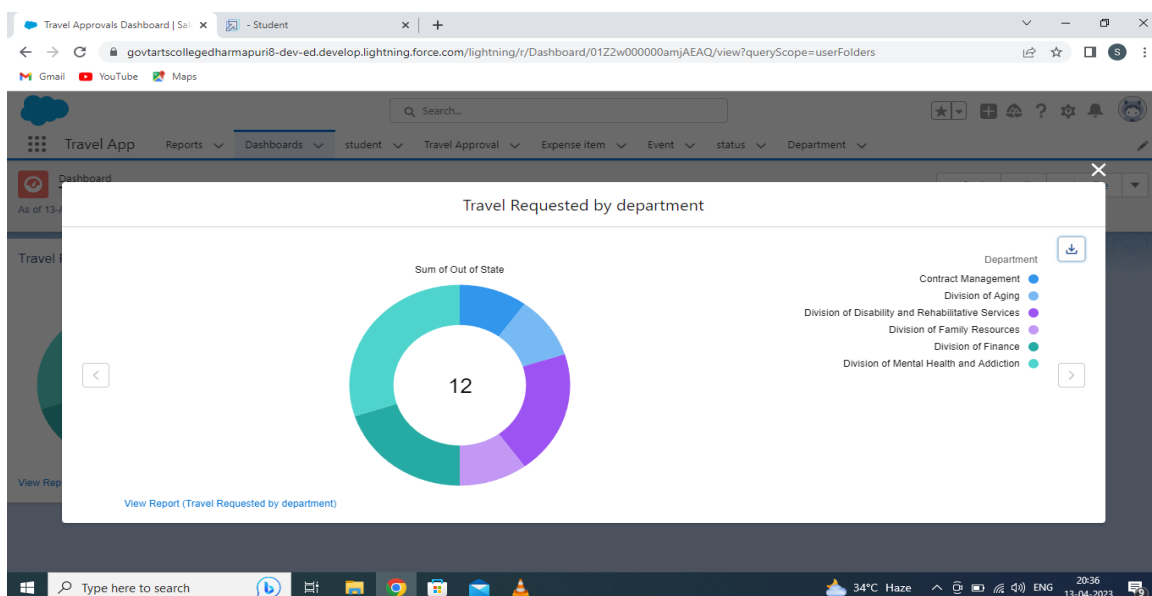
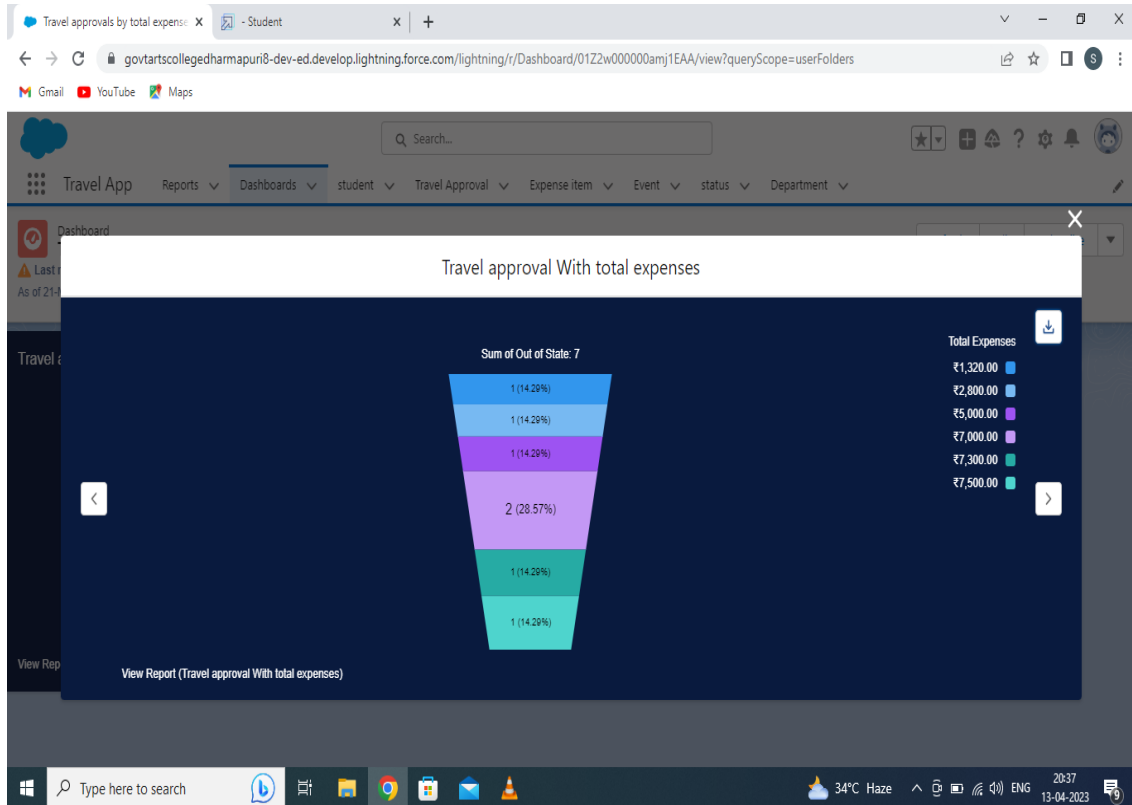
MILESTONE: 11

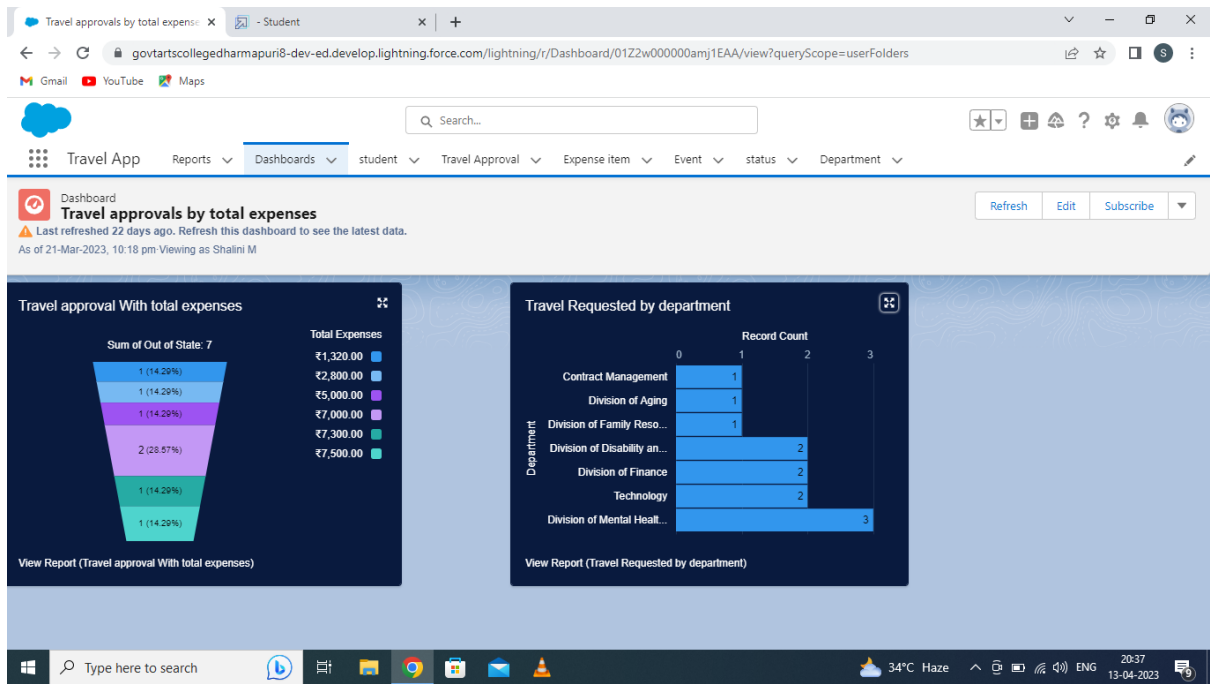
Dashboards

Creation Of Travel Approval Dashboard

- Click on dashboards.

- Give Your Dashboard Name and Click on Add Component
- Select the report which you have created.
- Select any of the chart and you will see the graph.





4. TRAILBLAZER PROFILE PUBLIC URL

Team Lead: <https://trailblazer.me/id/shalm36>

Name: M. Shalini

Team Member 1: <https://trailblazer.me/id/Sangavi123sss>

Name: R. Sangavi

Team Member 2: <https://trailblazer.me/id/Sandy123sss>

Name: M. Santhiya

Team Member 3: <https://trailblazer.me/id/Sarala123sss>

Name: P. Sarala

5. ADVANTAGES AND DISADVANTAGES

Advantages:


1. Travel Apps and websites provide cost savings and convenience to travellers.
2. By using them you can find the best deals, book trips, and simply plan your travel with just a few clicks.
3. Recent Travel apps and websites have completely changed the travelling experience of the traveller.

Disadvantages:

1. Snow Software company surveyed 3000 global workers across the US, UK and Asia Pacific about travel tech experience. The Survey showed that 59 percent of the traveller had travel issues caused by technology in one form or another.
2. Price was the biggest issue for the many travellers. Travel booking sites generally aggregates flight, lodging, and other costs in real-time across the countless airline carriers and hotels.
3. Many of the times the Travel apps and websites are not best either. The survey finds another 40 percent of the respondents said that they have to deal with a confusing or slow travel website.
4. More 27 percent of respondents said that they only find limited options for the travel they wanted to book.

6. APPLICATIONS

- 🚩 A Travel planning app is an application for booking travel reservations, tracking loyalty points, and browsing travel packages. A travel planning software package can be used by travel agencies, travel suppliers, and consumers.
- 🚩 A travel app gets users a direct answer to everything they need to know about the planning a vacation- the way to reach there, flight/train ticket details, hotel etc.
- 🚩 Travel application is one place to get every service regarding their travelling.
- 🚩 Easy to spread information about travelling.
- 🚩 Easy transaction.

 Digital customer, Digital services.

7. CONCLUSION:

From the travel approval application Project, Me and my team learned a lot about salesforce. On working for the Project, we learned many things and get a new experience. The above advantages and disadvantages of this app may help you to know about this project. The applications of this app in the daily life will helps you a lot in the travelling. This application makes easy way to apply for the trip.

Thank you so much for giving me this wonderful opportunity to learn new things and get some knowledge about the travel application.

8. FUTURE SCOPE:

The Disadvantages like technical problems must be reduced to make people find a easy way to apply for the trip.

By using the App you can easily book for the travelling and decide where you want to go and stay. You can choose things for lowest prices. You can complete the trip by just few clicks.

Thank you

