Build An Employee Travel Approval Application for Corporates (Admin)

College: LAKIREDDY BALI REDDY COLLEGE OF ENGINEERING

Team ID: LTVIP2023TMID09672

Team Size: 5

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INTRODUCTION

Salesforce, Inc. Is an American cloud-based software company headquartered in San Francisco, California. It provides customer relationship management (CRM) software and applications focused on sales, customer service, marketing automation, e-commerce, analytics, and application development. Founded by former Oracle executive Marc Benioff, Salesforce quickly grew into one of the largest companies in the world, making its IPO in 2004.

Salesforce is the customer success platform, designed to help everyone to sell, service, market, analyze, and connect with customers.

Salesforce takes all of that important data and organizes it into a simple user interface. It's one place for you to:

- Manage all your contacts
- Work with your prospective customers
- Organize tasks and to-do items
- Focus on the right deals
- Collaborate with your team
- Showcase your big wins
- Close more business

SALESFORCE ADMINISTRATOR

A Salesforce Administrator solves business problems by customizing the Salesforce Platform. They build, configure, and automate technology solutions to deliver business value**.** Salesforce Administrators work with stakeholders to define system requirements and customize the platform. Most importantly, they enable users to get the most out of Salesforce technology.

A Salesforce Admin best understands how to make the platform work for their company's goals. Some organizations may employ just one admin; some employ many people in this role.

Core responsibilities include supporting users, managing data, maintaining security standards, and delivering actionable analytics. A Salesforce Administrator's colleagues can rely on them to:

Maintain the platform

Make it as easy as possible for users of any technical level to use Salesforce

Stay current on the platform's new tools, capabilities, and updates

Core skills Admins should strive to develop to be successful include:

- Product Management
- User Management
- Data Management
- Security
- Business Analysis
- Automating Processes
- Analyzing Data
- Problem-Solving
- Communication
- Learner Mindset
- Attention to Detail

PROJECT INTRODUCTION

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 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.

This project includes,

1. Real-Time Salesforce Project
2. Object & Relationship in Salesforce

Some of the important elements used in Salesforce to implement this project are,

1. OBJECT

Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

2. TAB

Tabs in Salesforce help users view the information briefly. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

(A) Standard Object Tabs: Standard object tabs display data related to standard objects.

(B) Custom Object Tabs: Custom object tabs display data related to custom objects.

(C) Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.

(D) Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

3. LIGHTNING APP

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

1. Standard App: Standard apps come with every occurrence of Salesforce as default. Many features like Sales, Marketing, Community, call center, content, Salesforce Chatter, App Launcher, etc are present in it.

2. Custom Apps: Custom apps are created according to the needs of the user. Custom Apps are made by using standard and custom tabs together.

4. FIELDS AND RELATIONSHIPS

Fields - Fields store data values that are required for a particular object in a record.An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

5. USERS

A user is anyone who logs into Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

6. USE CUSTOMIZATION

Customization refers to custom software development and coding to add robust features to your CRM platform. These features can be integrated with your business to have a scalable impact.

7. DATA IMPORT

Data Import lets you upload data from external sources and combine it with data you collect via Analytics. You can then use Analytics to organize and analyze all of your data in ways that better reflect your business.

The Data Import Wizard is a Tool that makes it easy to import data for many standard Salesforce objects, including accounts, contacts, leads, solutions, campaign members, and person accounts. You can also import data for custom objects.

In order to complete this milestone, you need to create a CSV file and give them the data given in the picture below. After that from these CSV files we will import data for Department & Travel Approval (Custom Object).

8. VALIDATION RULE

It can contain a formula or expression that evaluates the data in one or more fields & returns a value of true or false. Validation Rules also include an error message to display to the user when the rule returns a value true due to an invalid value/data.

9. REPORTS

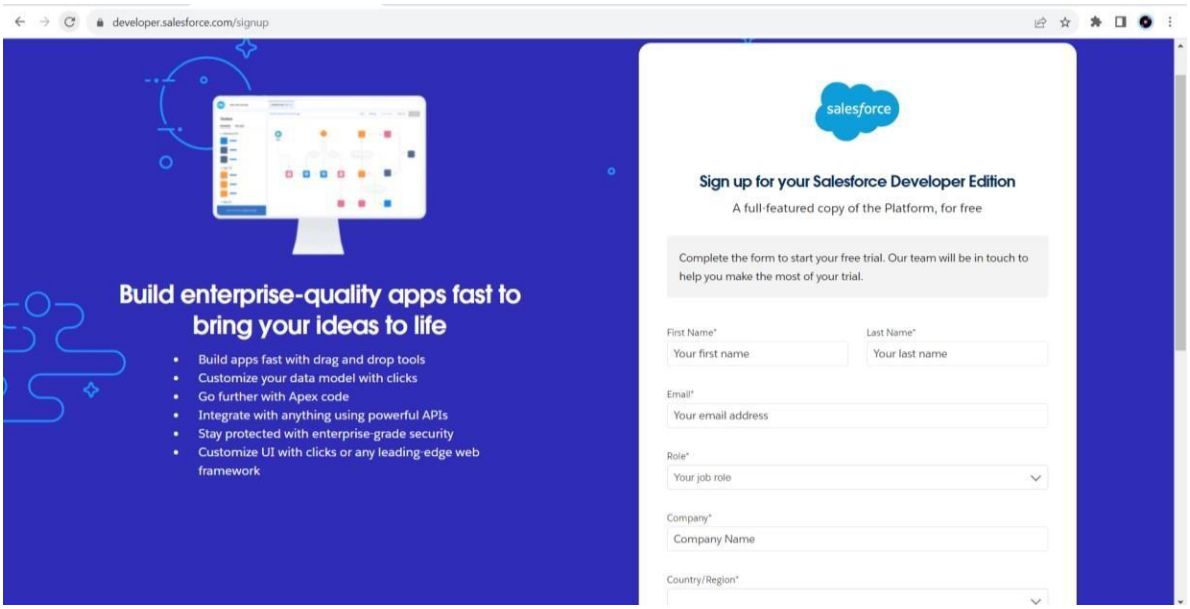
Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

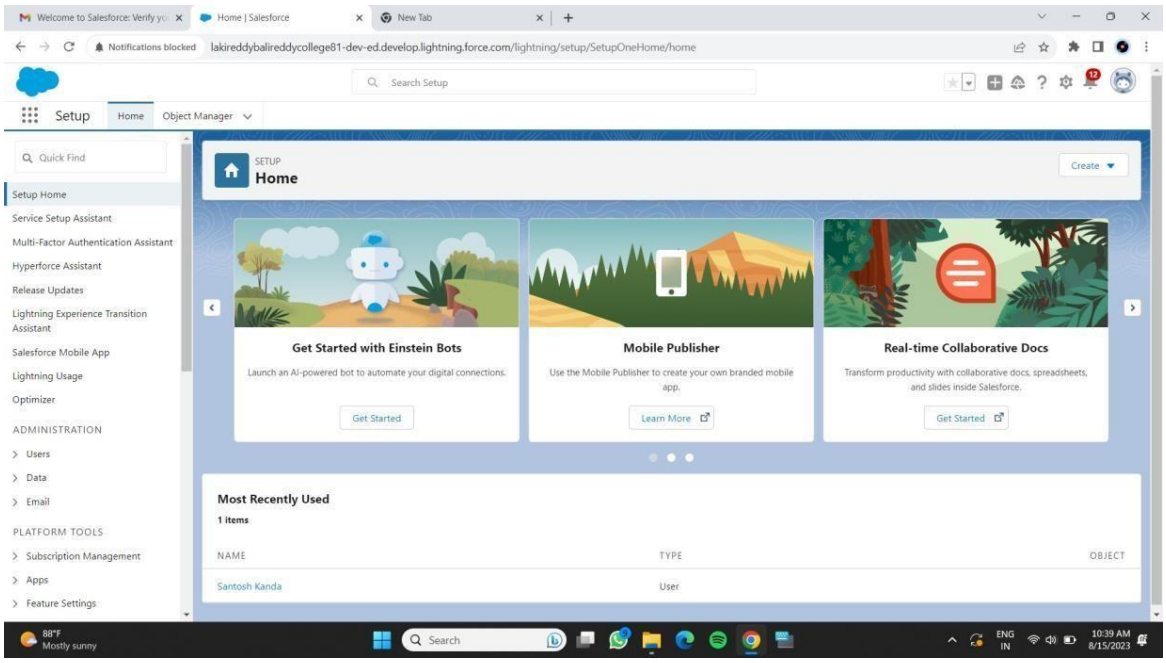
10. DASHBOARDS

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

PROJECT IMPLEMENTATION

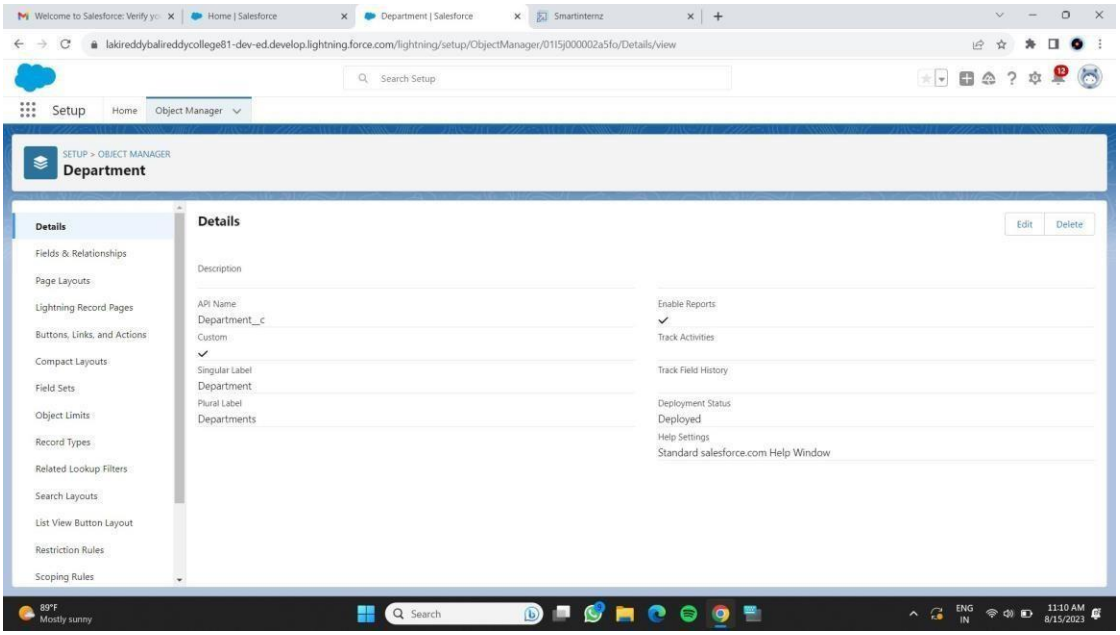
Creation of Salesforce Org and Account Activation

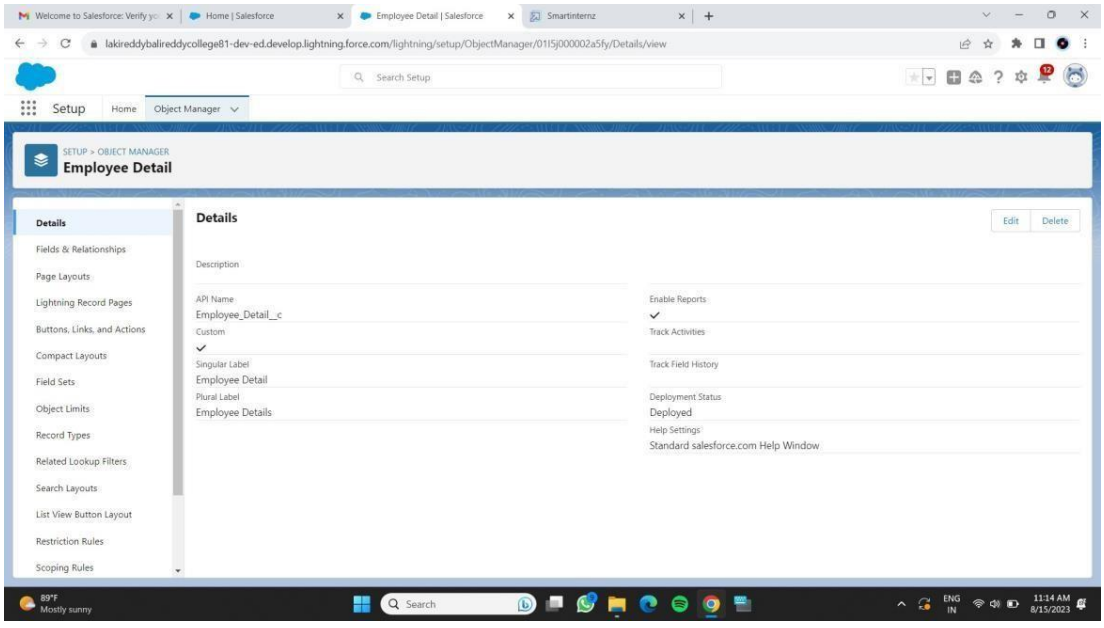


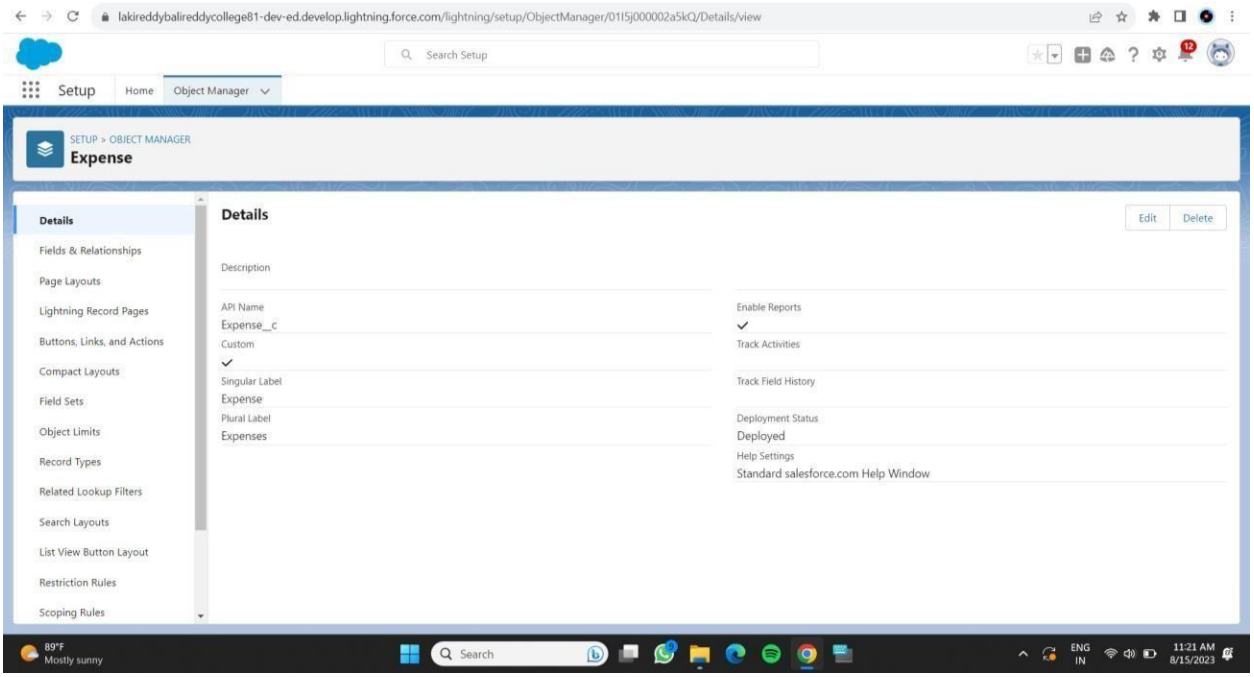


Creation of Custom Objects

For this Travel Approval we need to create 5 objects **Department, Employee Detail, Expense, Expense Items,** and **Travel Approval**.



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Record Types
Related Lookup Filters
Search Layouts
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Restriction Rules
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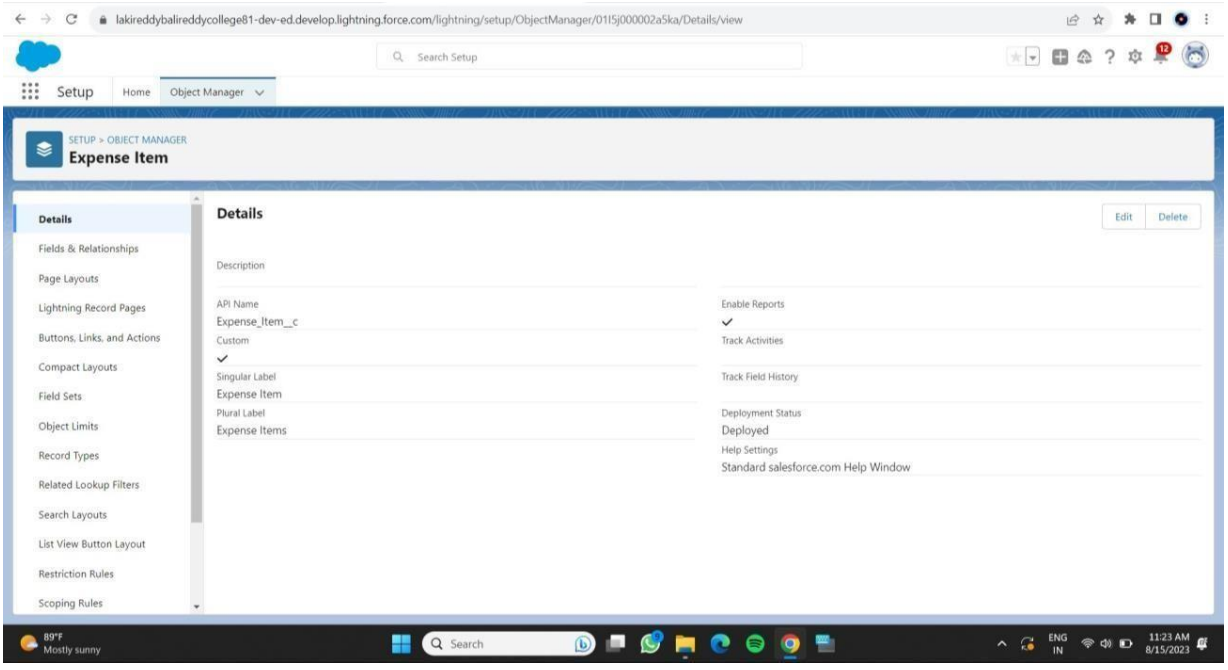
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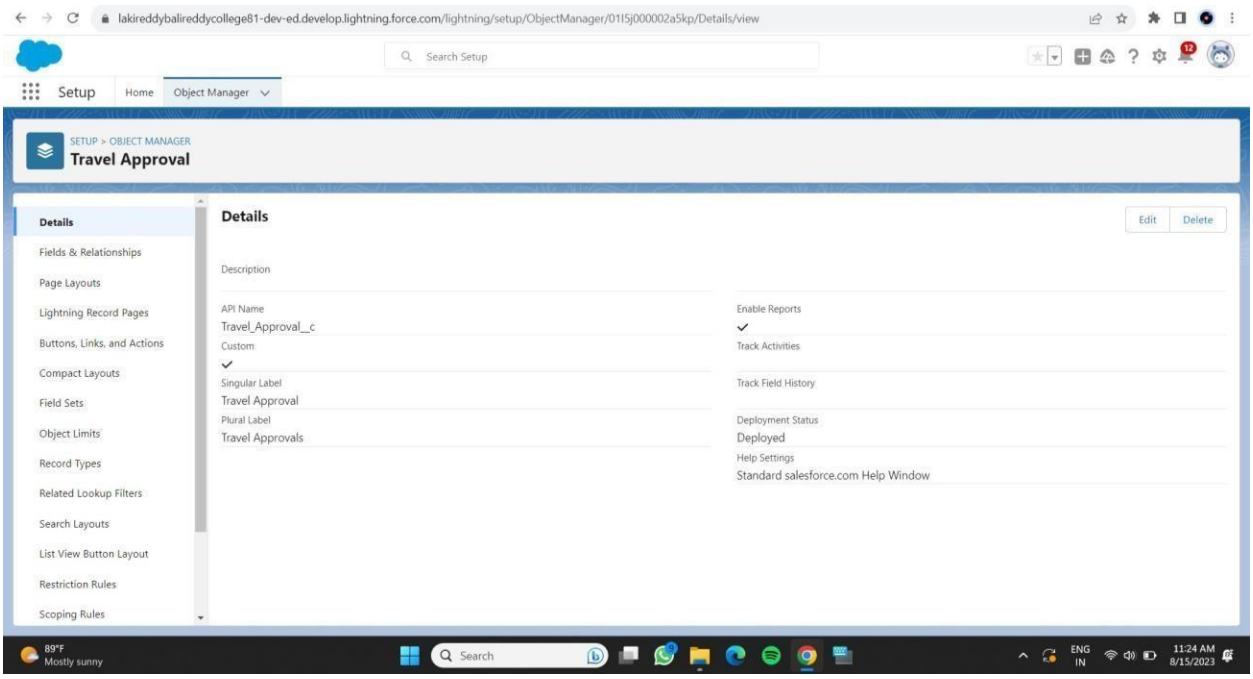
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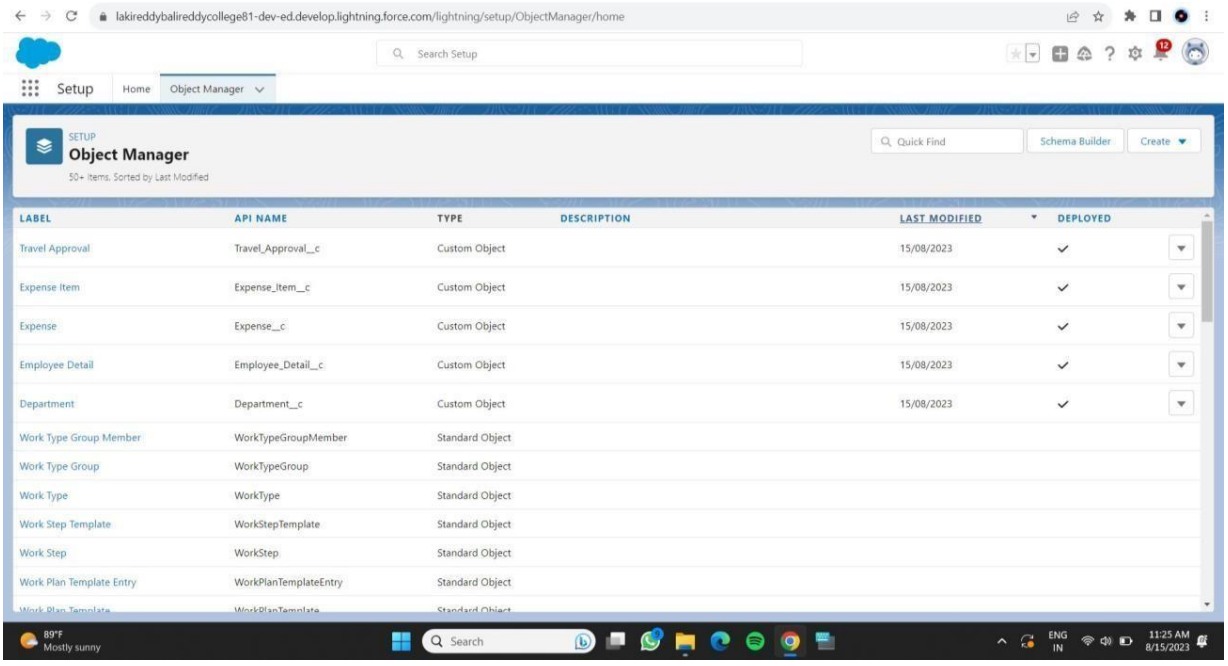
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TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Travel Approval
Travel_Approval__c
Custom Object
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Expense Item
Expense_Item__c
Custom Object
15/08/2023
Expense
Expense__c
Custom Object
15/08/2023
Employee Detail
Employee_Detail__c
Custom Object
15/08/2023
Department
Department__c
Custom Object
15/08/2023
Work Type Group Member
WorkTypeGroupMember
Standard Object
Work Type Group
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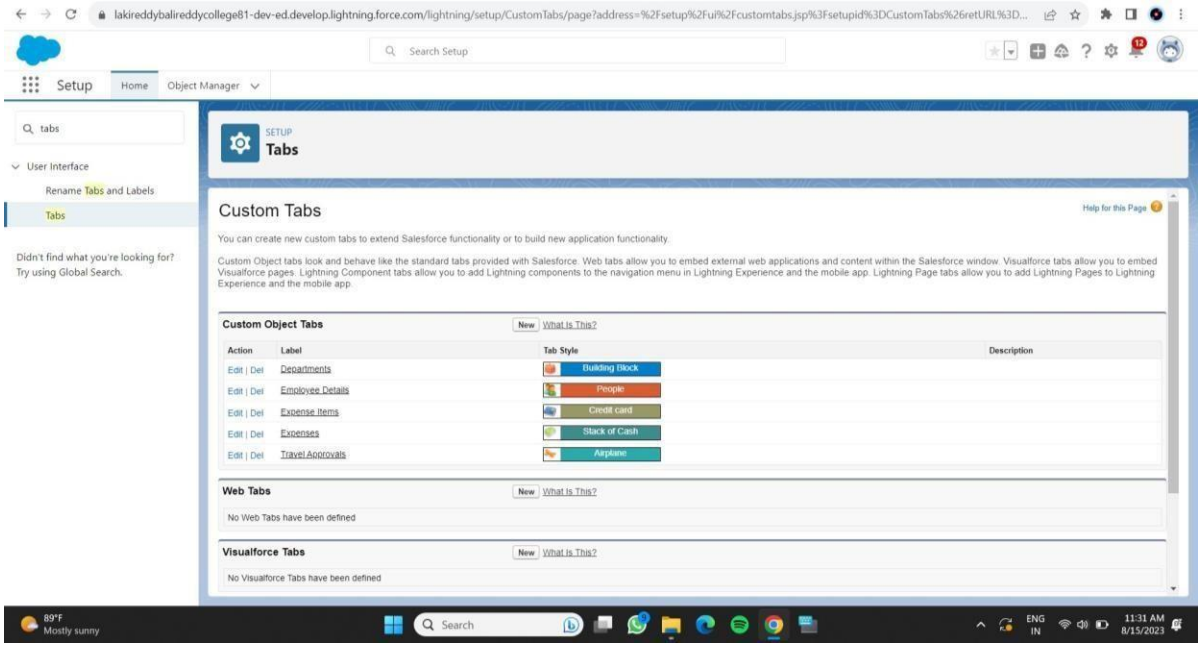
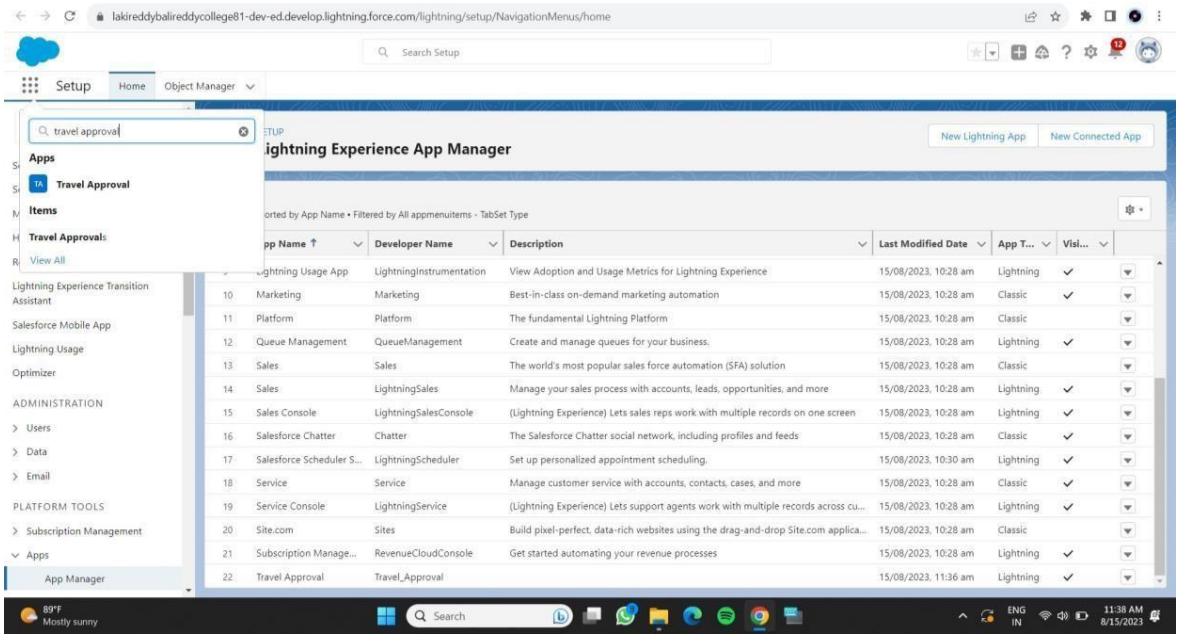
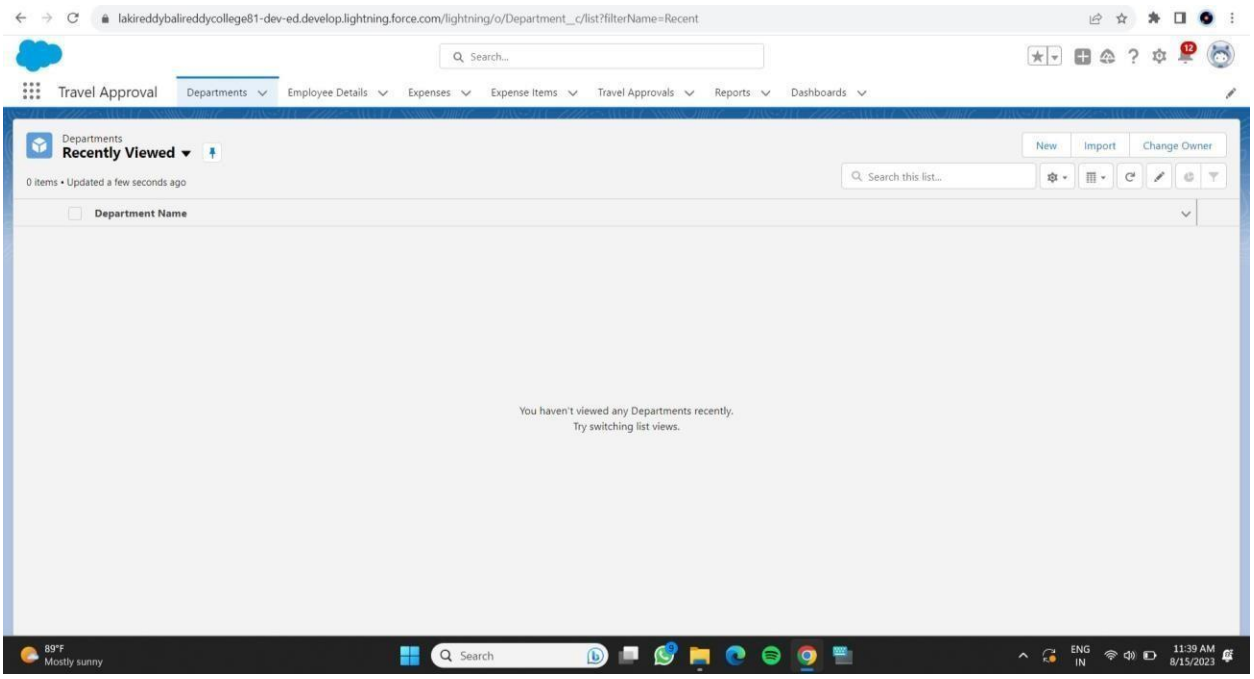
Creation of Custom Tabs



Creation of Travel Approval App (Lightning App)

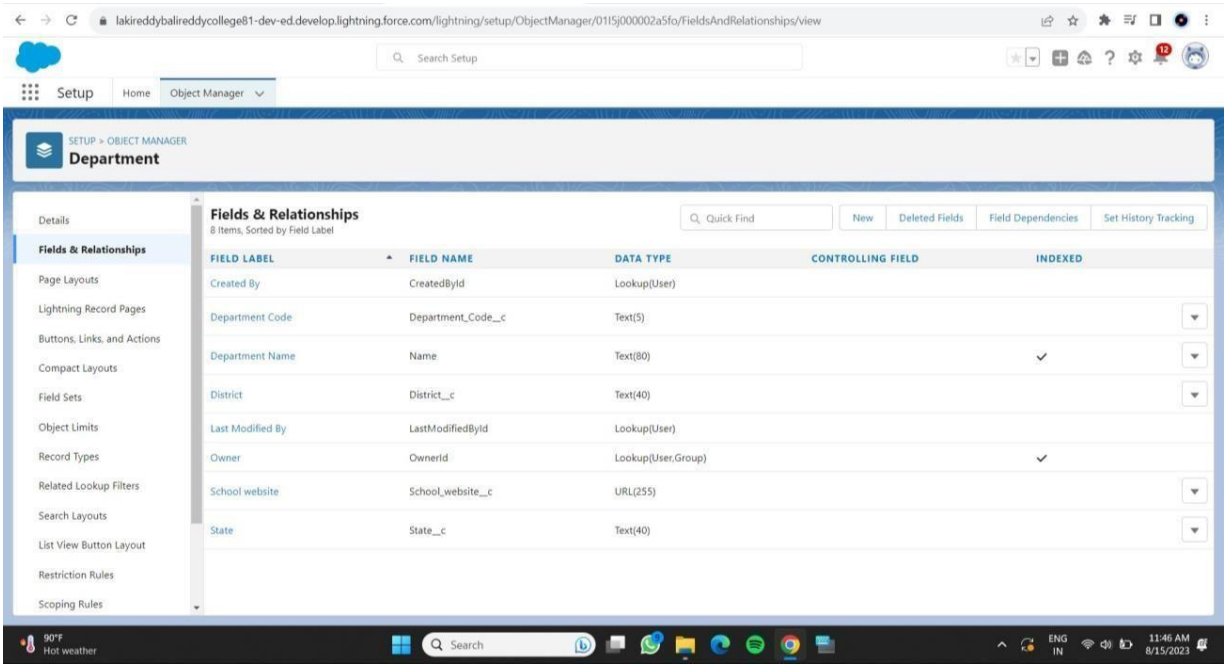


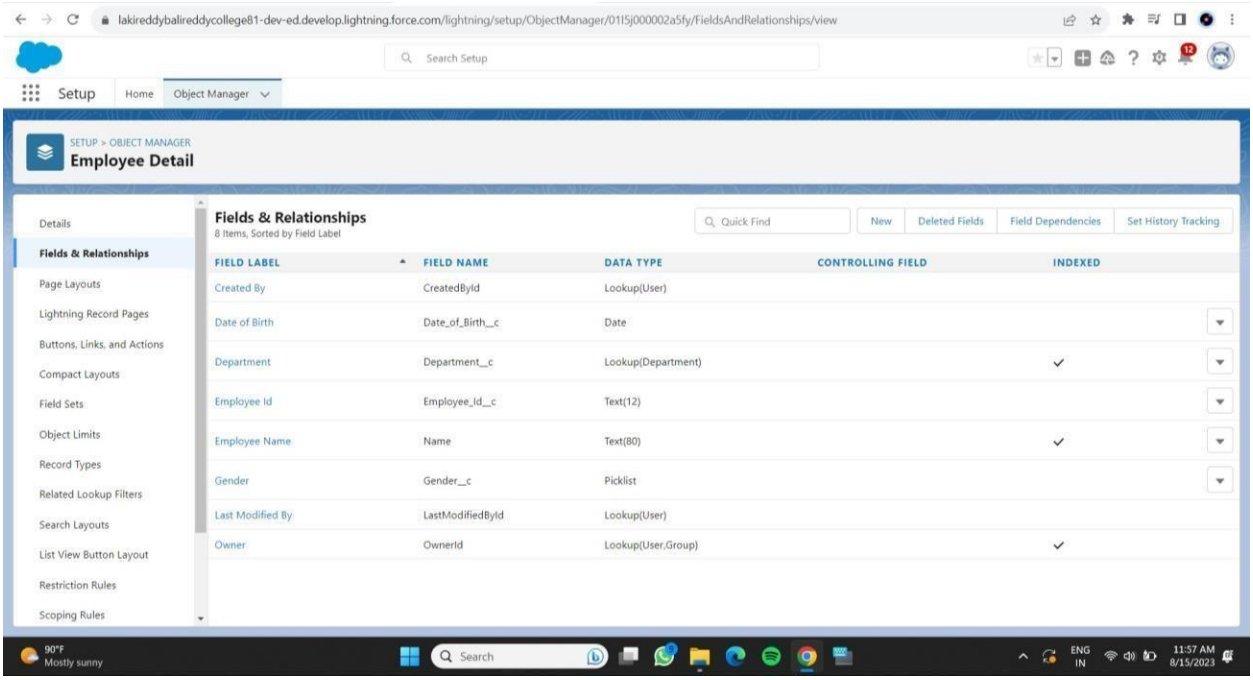


Creation of Fields

Object Name	Field Name	Data Type
Department	Department Code District State School Website	Text (Length - 5) Text (Length - 40) Text (Length - 40) URL
Employee Detail	Date of Birth Gender Department	Date Picklist (Male, Female) Lookup (Department)
Expense	Employee Total Item	Lookup (Employee Detail) Rollup summary (Expense-Item)
Expense Item	Expense Expense Type	Master Detail (Expense) Pick List (Values are - Transport, Hotel, Meal, Others)

	Amount	Currency
Travel Approval	Employee Name Department Destination State Purpose of Trip Trip Start Date Trip End Date Status	Lookup (Employee Detail) Lookup (Department) Text (Length – 40) Text (Length – 256) Date Date Picklist (Values are - Approved, Rejected)

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Employee Detail
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Page Layouts
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Buttons, Links, and Actions
Compact Layouts
Field Sets
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Record Types
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Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Fields & Relationships
8 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)
Date of Birth
Date_of_Birth__c
Date
Department
Department__c
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Employee Id
Employee_Id__c
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Employee Name
Name
Text(80)
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Picklist
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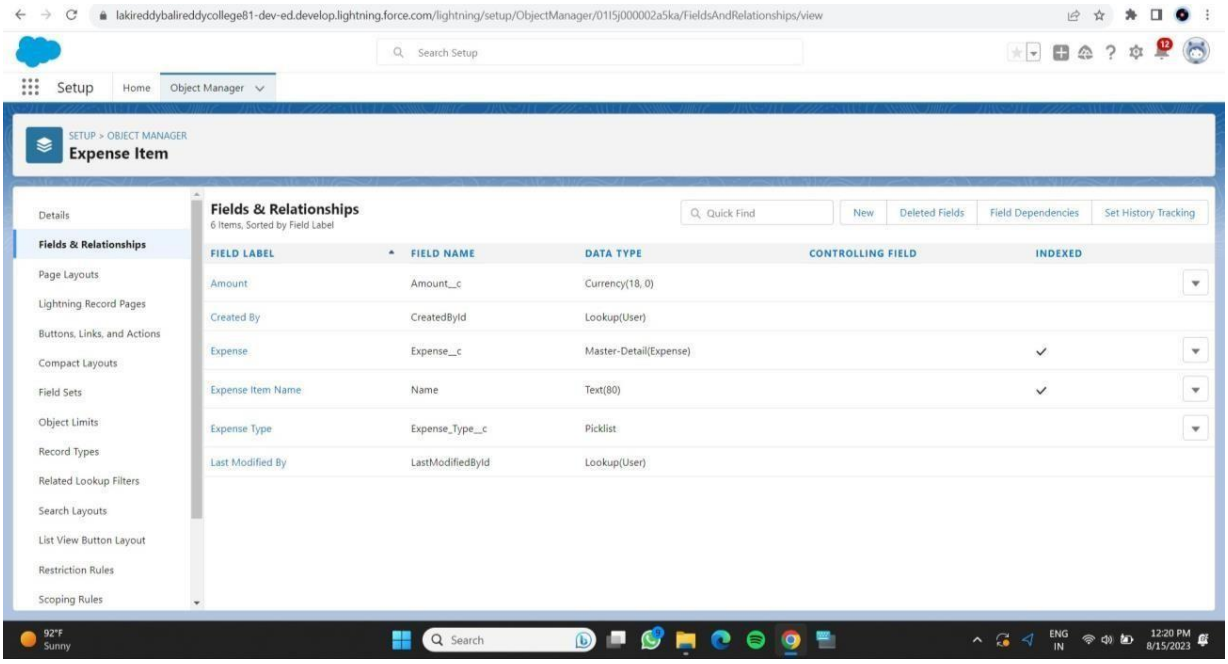
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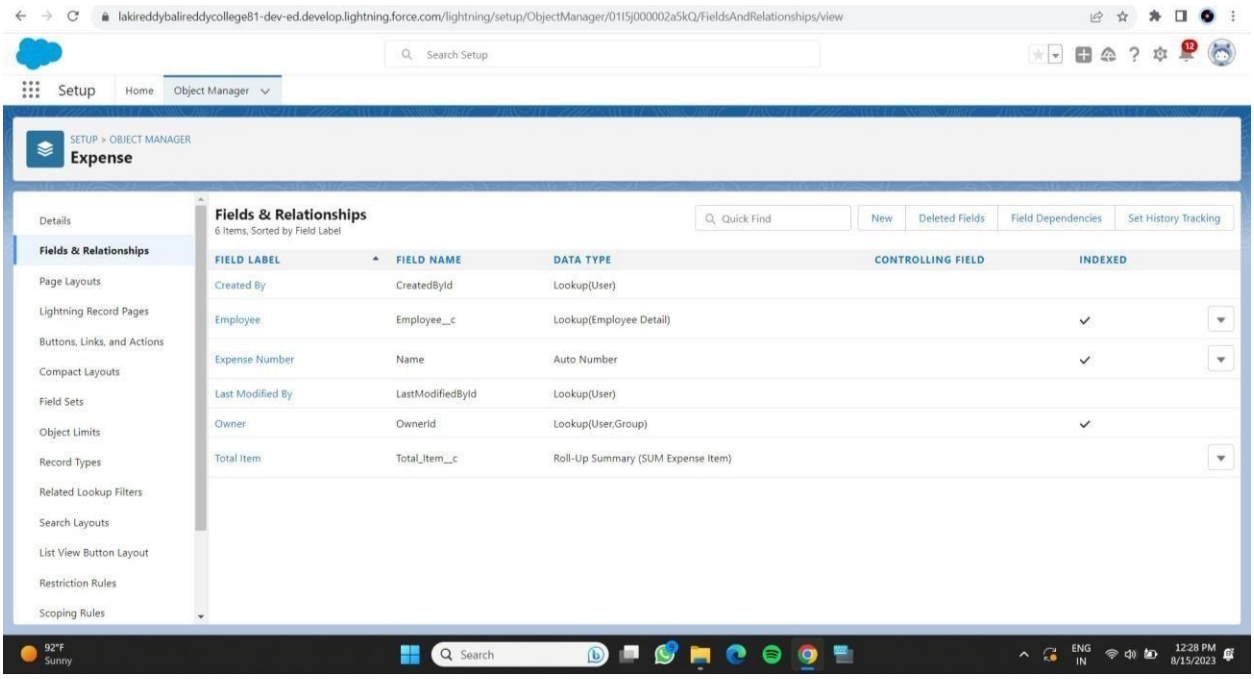
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Employee__c
Lookup(Employee Detail)
Expense Number
Name
Auto Number
Last Modified By
LastModifiedById
Lookup(User)
Owner
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Roll-Up Summary (SUM Expense Item)
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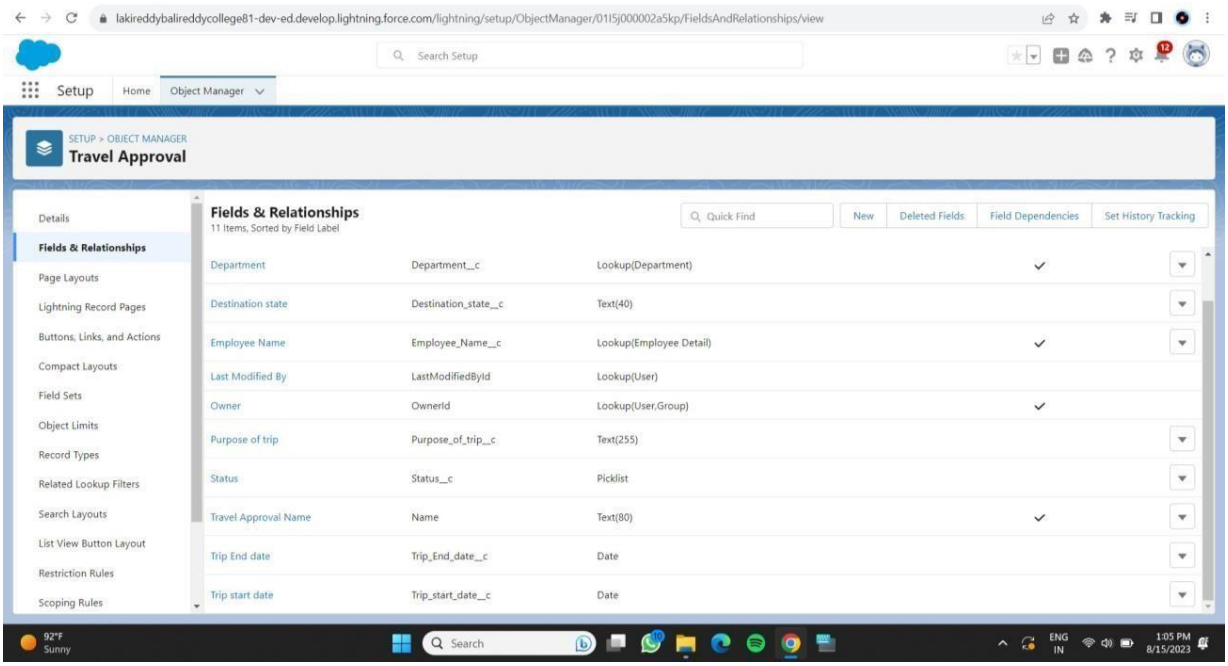
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Destination_state__c
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Last Modified By
LastModifiedById
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Owner
OwnerId
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Purpose of trip
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Status
Status__c
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Name
Text(80)
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Trip_End_date__c
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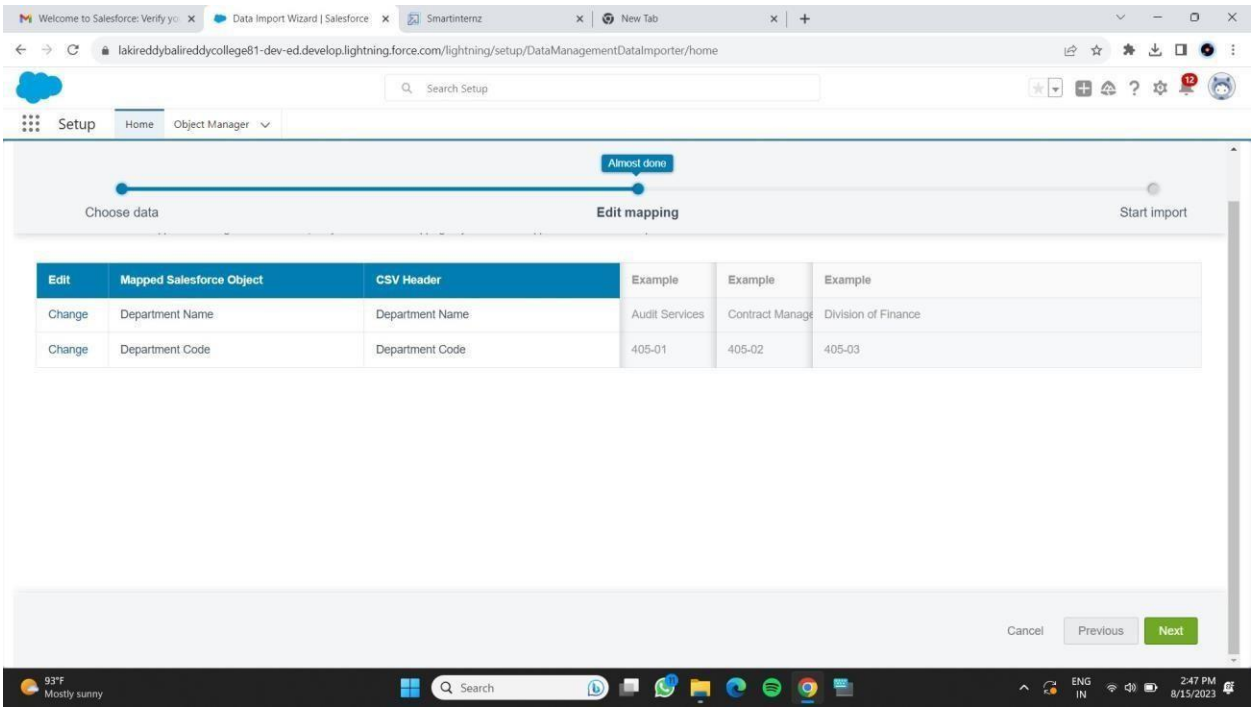
Data Import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Home
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Choose data
Edit mapping
Start import
Edit
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Example
Example
Example
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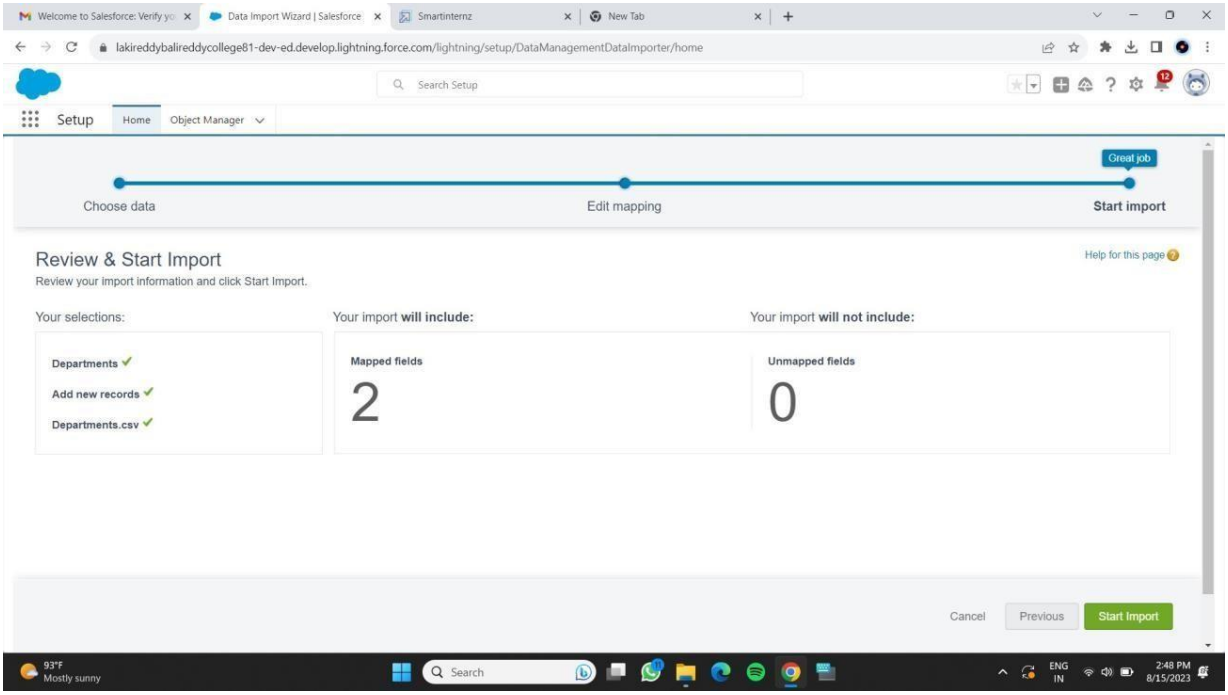
405-03
Cancel
Previous
Next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Home
Object Manager
Great job
Choose data
Edit mapping
Start import
Review & Start Import
Review your import information and click Start Import.
Help for this page
Your selections:
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Your import will not include:
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2
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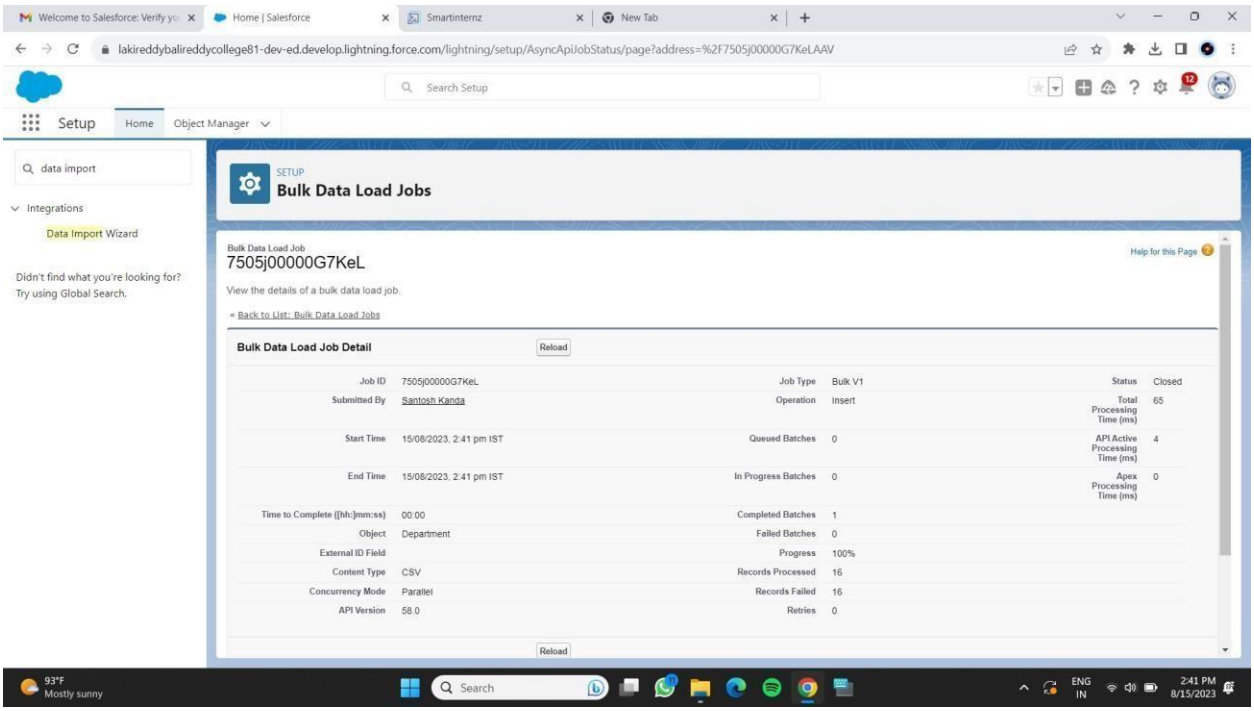
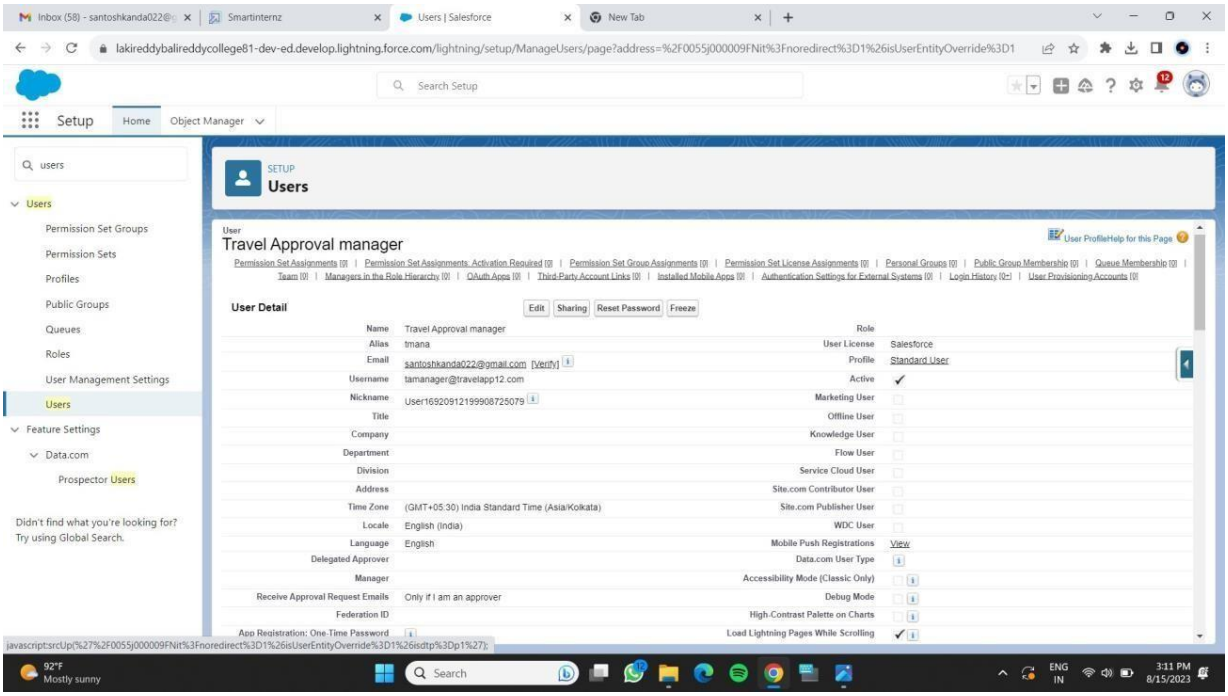
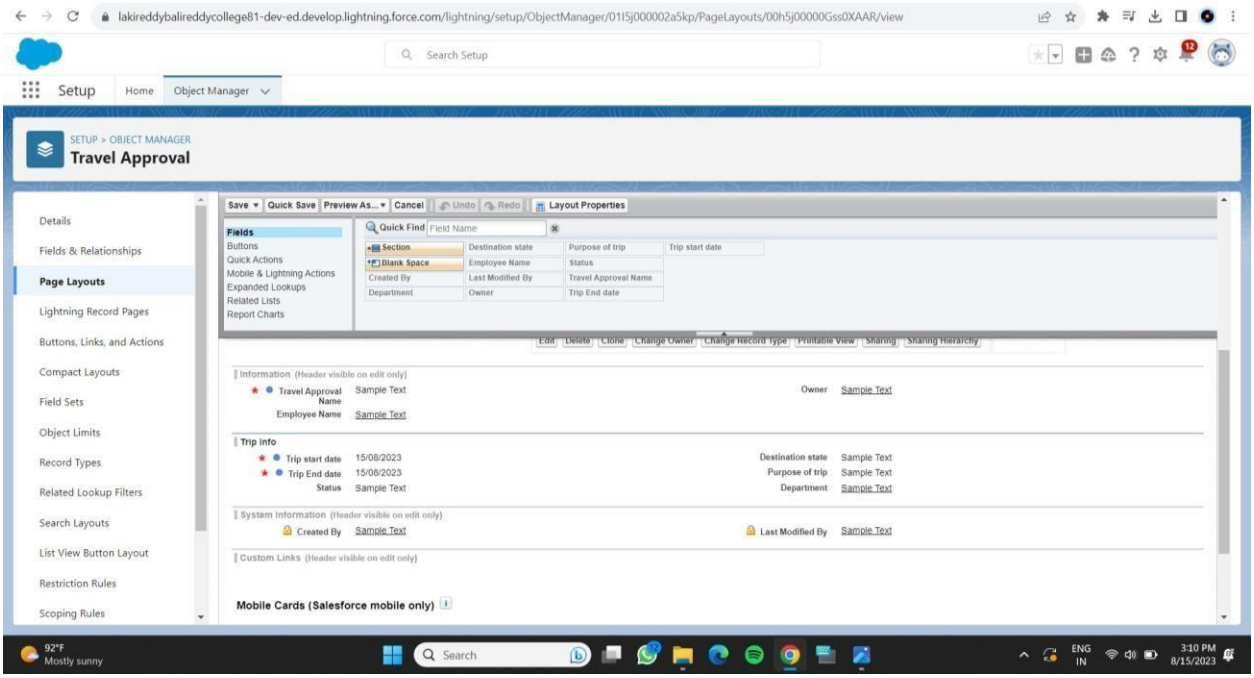
0
Cancel
Previous
Start Import



Creation of User

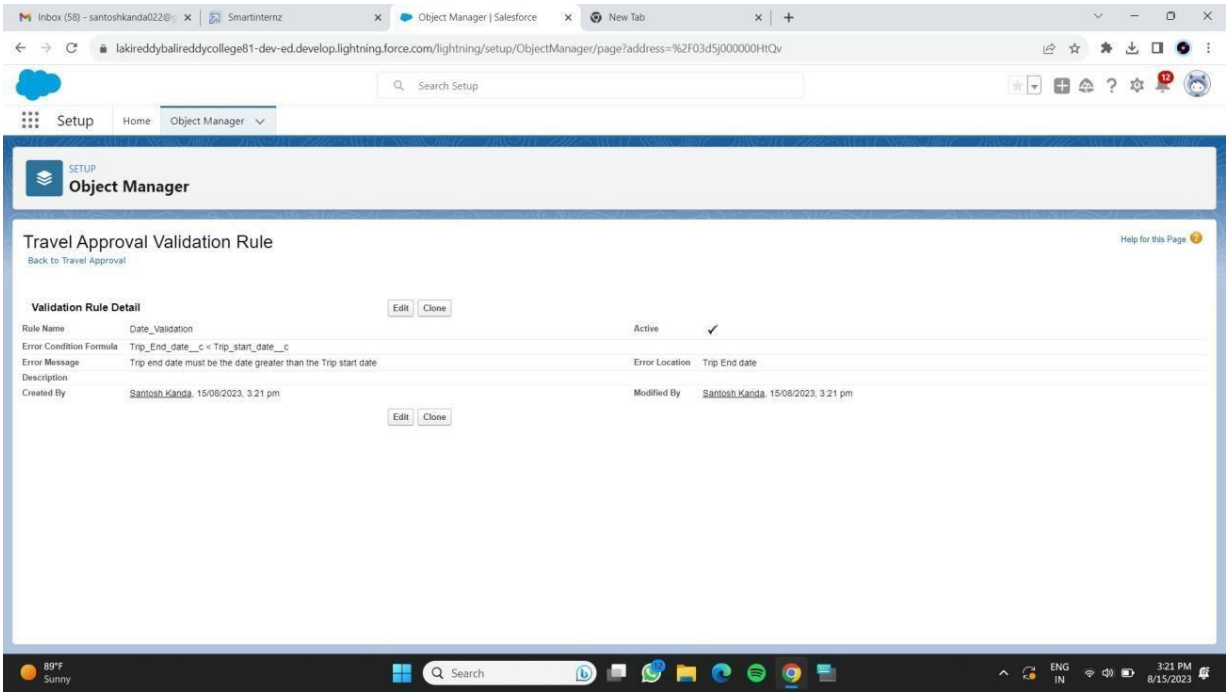


Customization of Travel Approval Object Page Layout



Add Business Logic to Travel App

Creation of Validation Rule



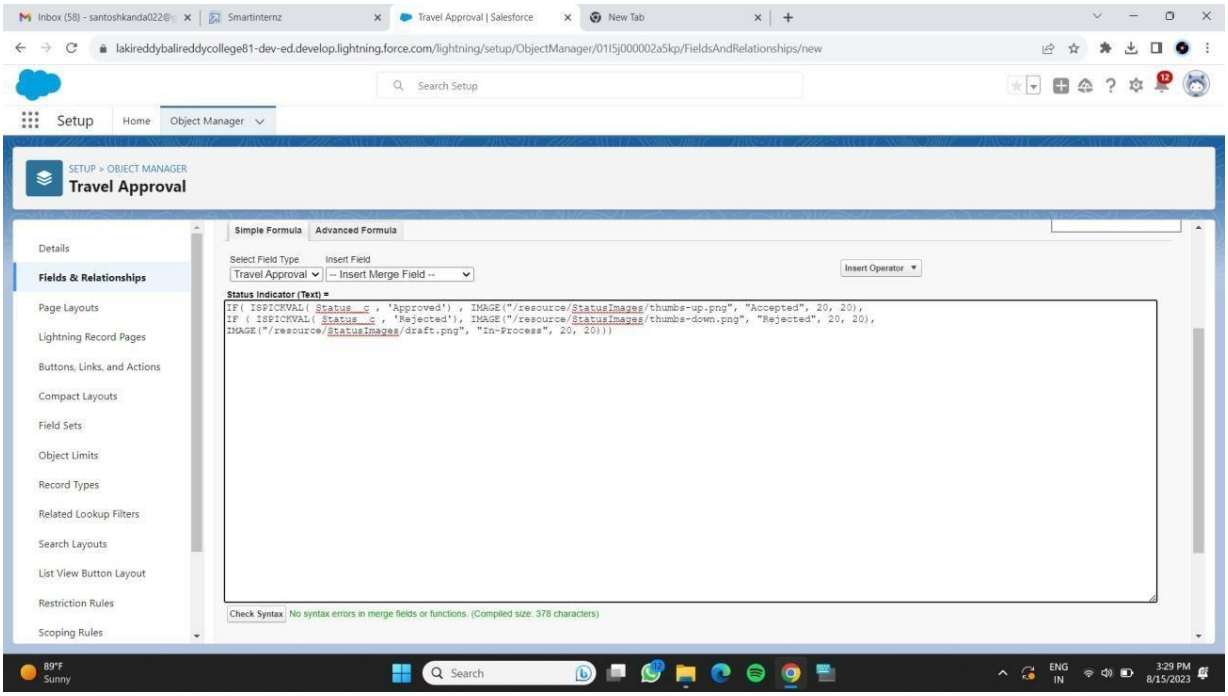
Creation of Formulae Fields

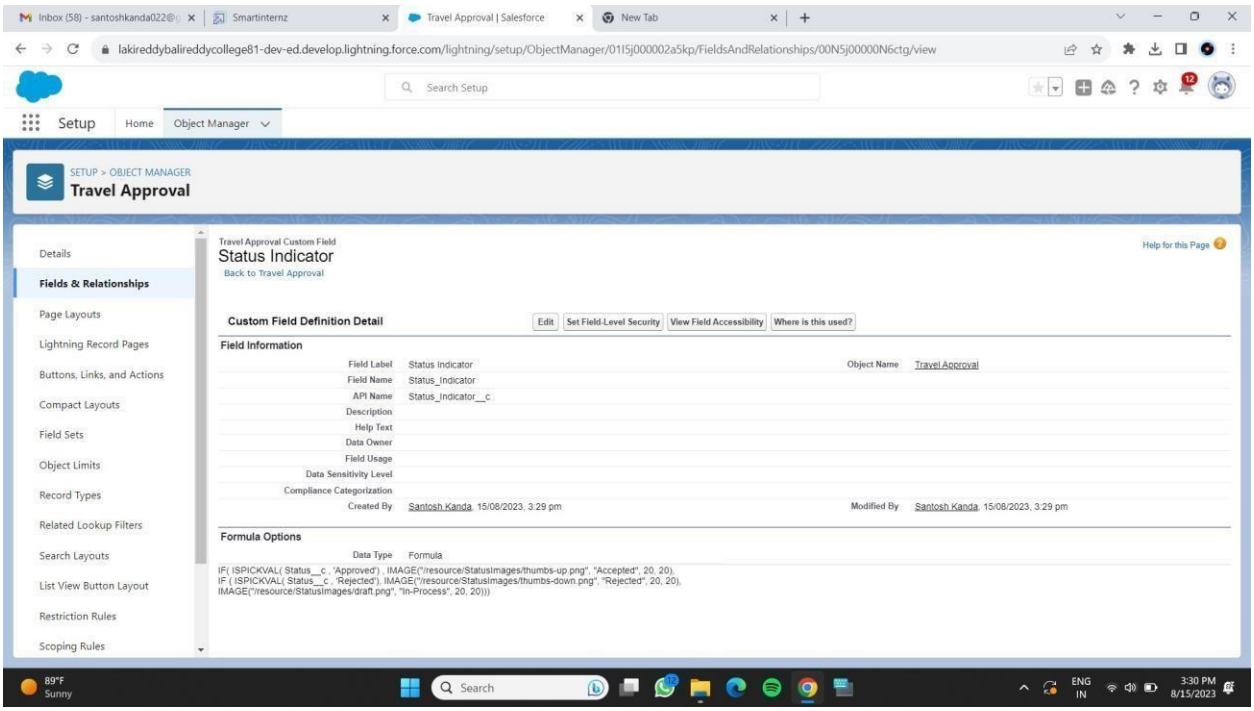
Formula: -

IF (I S P I C K V A L (S t a t u s c , 'Approved') , IMAGE("/resource/Status Images/thumbs-up.png", "Accepted", 20, 20),

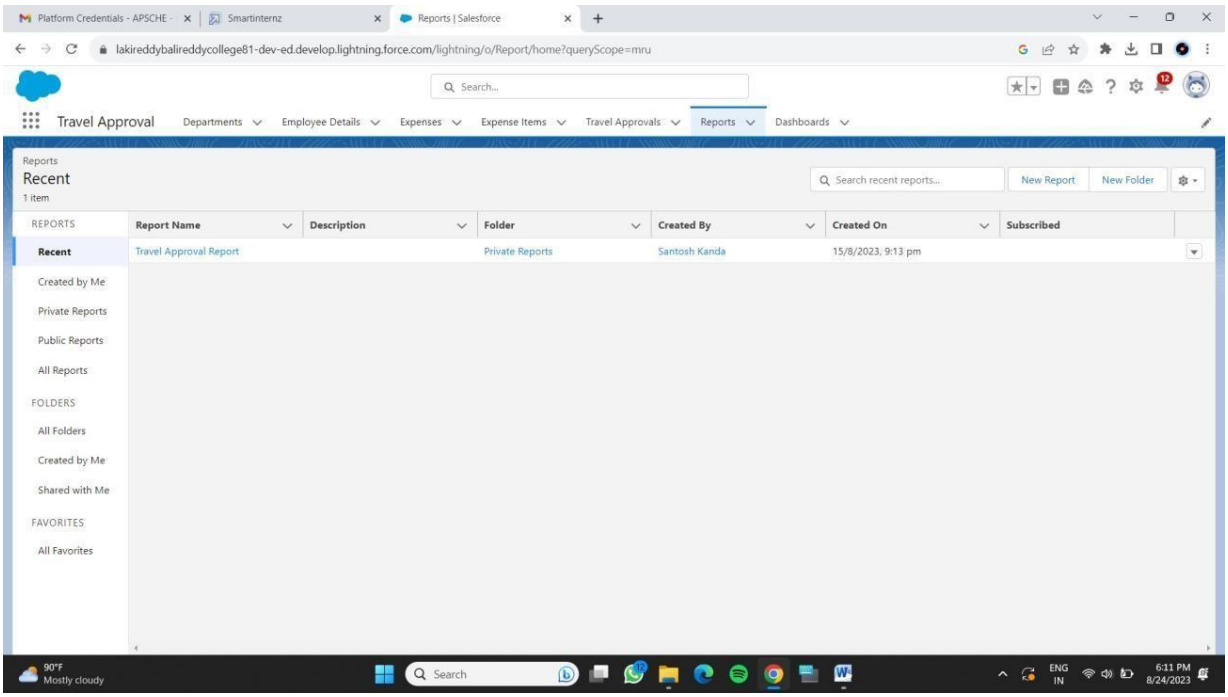
IF (ISPICKVAL(Status_c , 'Rejected'), IMAGE("/resource/Status Images/thumbs-down.png", "Rejected", 20, 20),

IMAGE("/resource/Status Images/draft.png", "In-Process", 20, 20)))

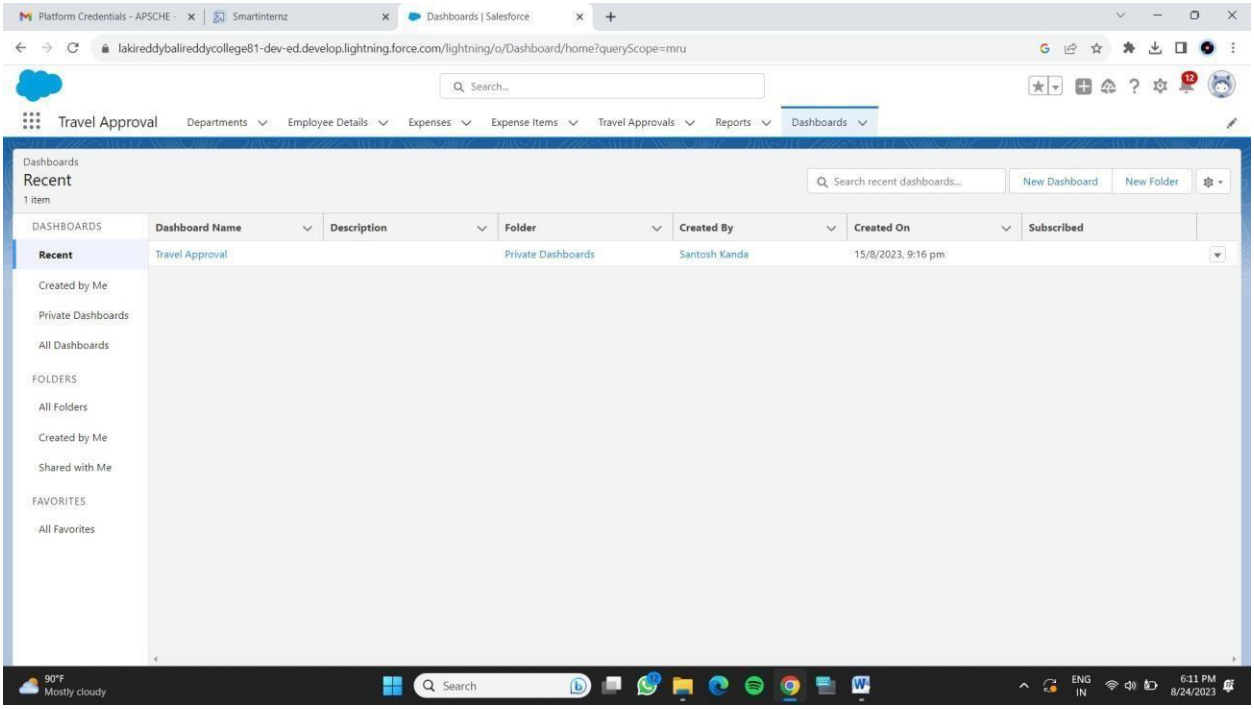




Creation of Report



Creation of Dashboard



ADVANTAGES

- The process is tedious and time-consuming task.
- Easiest way.
- Saves time for both employees and managers.
- Reduces the workload.
- The entire process is digitized and streamlined.
- Increased Transparency.
- Provides greater control and security over employee travel.

DISADVANTAGES

- The process includes too many levels of approval that makes confusing.
- Regular Maintenance.
- Internet Connection problem is there.
- Poor Connection leads to trouble and anxiety.
- Lack of leadership.
- It can be costly sometimes.
- Poor communication.

APPLICATIONS

The application ensures that travel requests comply with the company's travel policies which reduces the risk of non-complaint expenses and unnecessary travel. The application helps reduce travel costs by allowing the company to track expenses and stay within budget. This also helps the company negotiate better deals with travel vendors. The application saves time for both the employee and the travel manager by automating the travel request and approval process. This allows the HR department and travel managers to focus on more strategic tasks.

CONCLUSION

In this project, we built an Employee Travel Approval Application. An Employee Travel Approval Application is a valuable tool for corporate travel management. It streamlines thetravel request and approval process, ensures policy compliance and provides transparency to all parties involved. A well-designed application can save time and money, making it an essential tool for corporate that frequently travel for business.

FUTURE SCOPE

- In future it will be really a useful one in the application of travel approval.
- It is trusted to be in future everyone will utilize this.
- The customer will set good service and make it trustworthy.
- Hope it would fulfil all the needs of the users.