

Project Report Template

BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

1.INTRODUCTION:

1.1 OVERVIEW

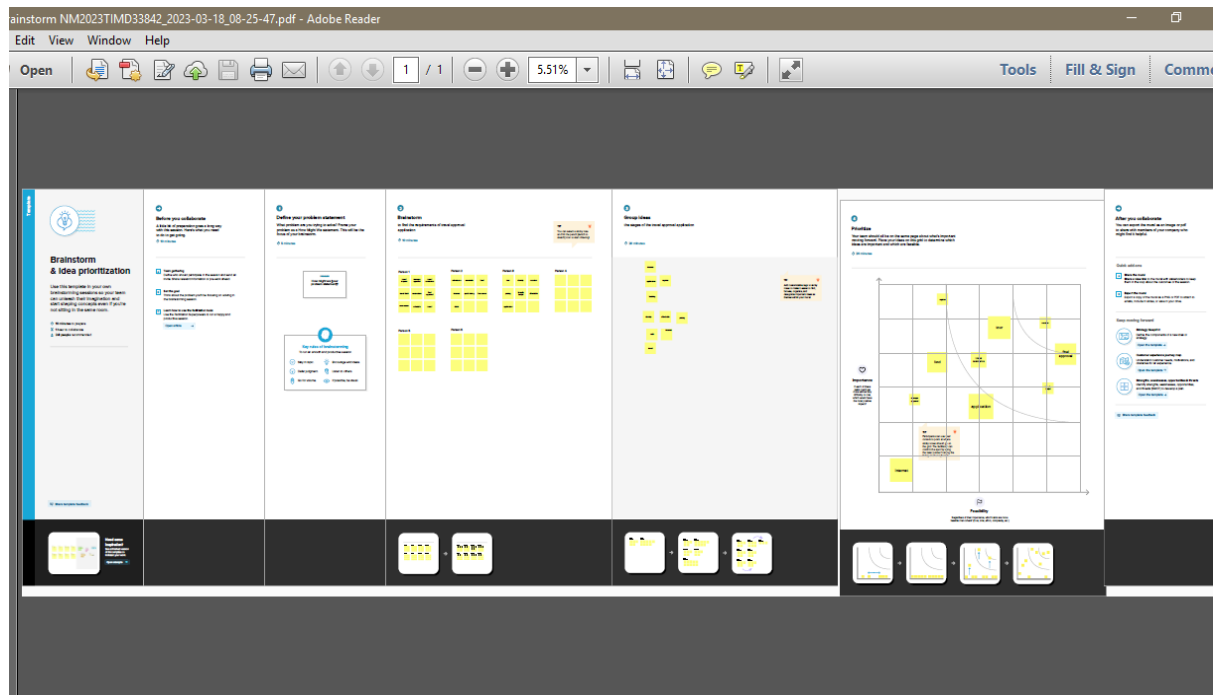
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project.

1.2 PURPOSE

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.

2.PROBLEM DEFINITION AND DESIGN THINKING

2.1 Empathy Map



3. RESULT:

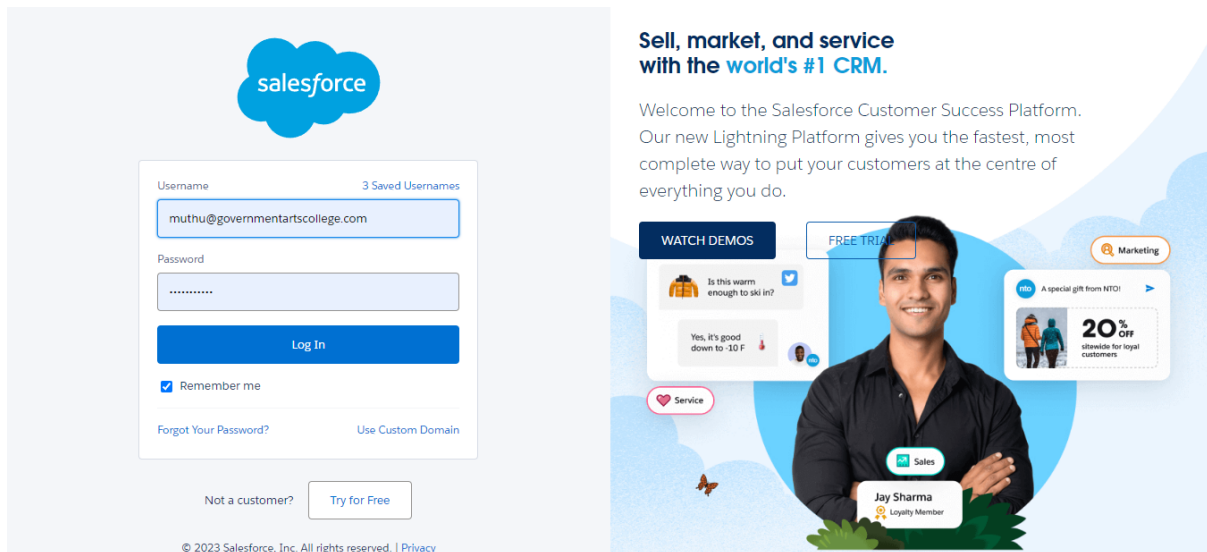
3.1 Data model:

Object name	Field in the object	
Department	FIELD LABEL	DATA TYPE
	Department code	Text(10)
	Department Name	Text(80)
Travel approval	FIELD LABEL	DATA TYPE
	Department	Lookup(Department)
	Destination State	Text(2)
	Out-of -State	Checkbox
	Purpose of Trip	Text Area(255)
	Status	Picklist
	Status Indicator	Formula(Text)
	Total Expenses	Roll-Up Summary (SUM Expenses Item)
	Travel Approval	Auto Number
	Trip End Date	Date
	Trip Start Date	Date
Expense Item	FIELD LABEL	DATA TYPE
	Amount	Currency(16,2)
	Expense Item Number	Auto Number
	Expense Type	Picklist
	Travel Approval	Master-Detail(Travel Approval)

3.2 Activity and screenshot:

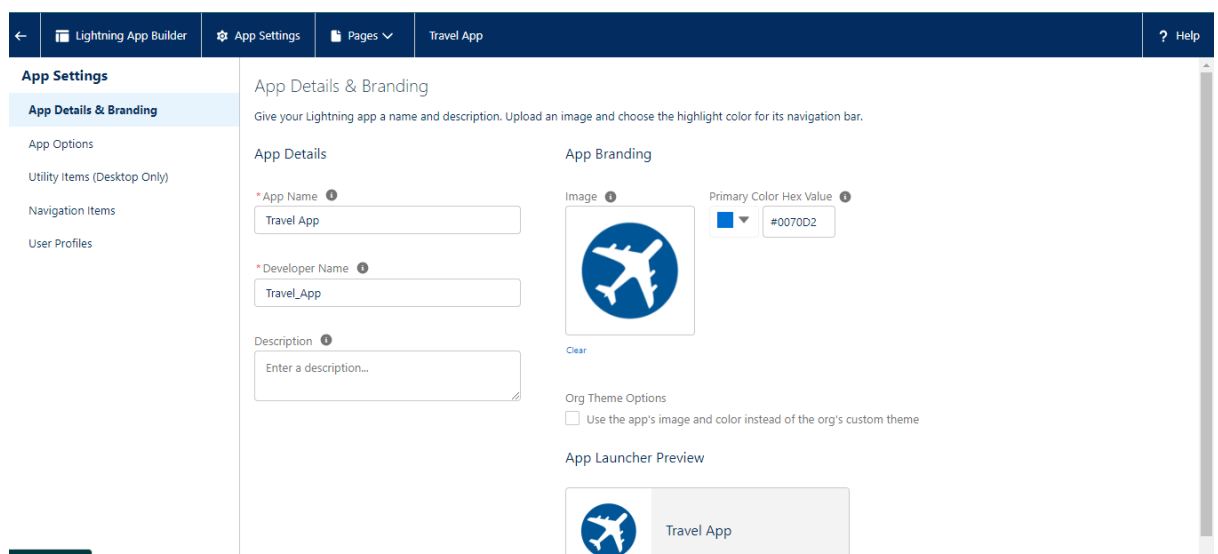
Milestone 1- Create Salesforce Org:

We have created the developer account and login for Salesforce account.



Milestone 2- Creating the Application:

We have created the Travel Application. For that we have used the lightning experience app manager.



Milestone 3- Object :

In this Travel Approval application we need to create three objects:

Department

Travel Approval

Expenses Item

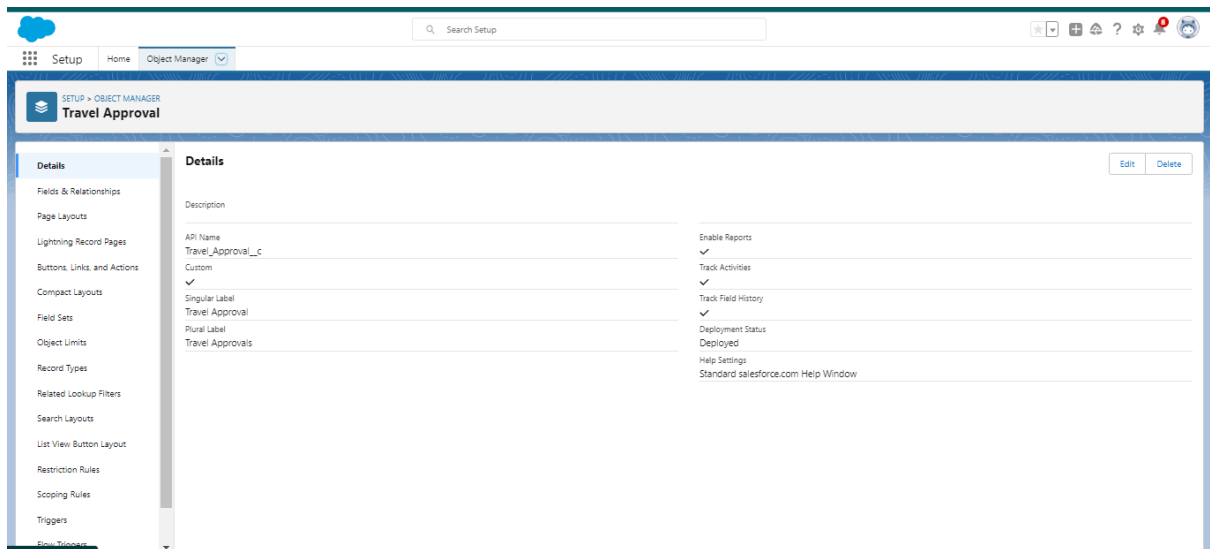
Department

The screenshot shows the Salesforce Setup interface for the 'Department' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Object Manager' as the selected option. The main content area is titled 'Department' and displays the 'Details' tab. The left sidebar lists various configuration options for the object, including 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, and Scoping Rules. The main content area shows the following details:

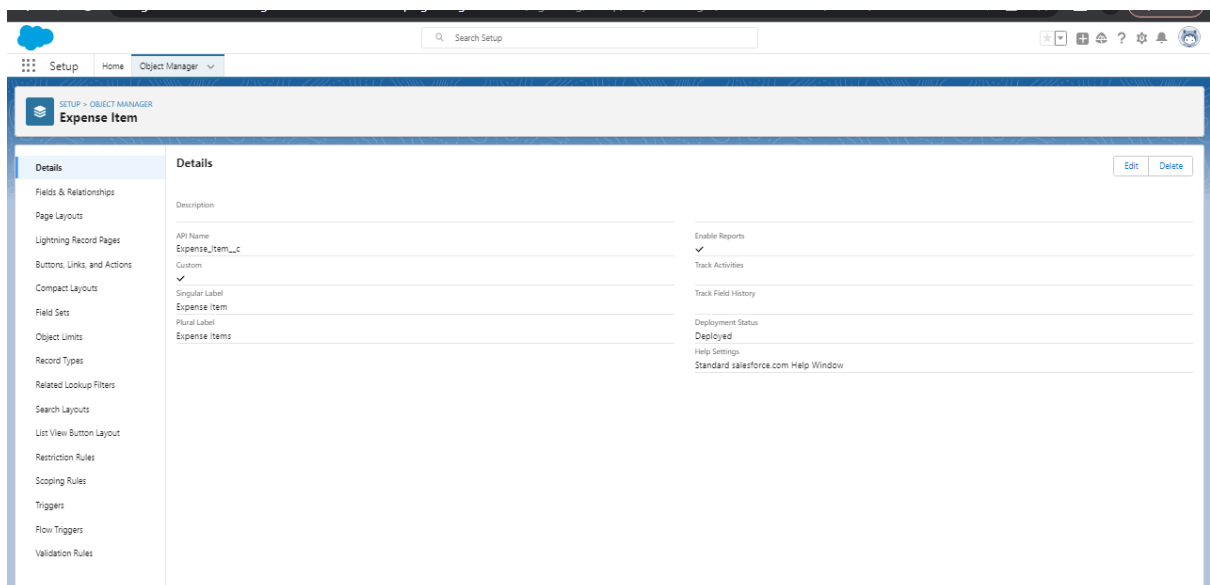
Details	
Description	
API Name	Department__c
Custom	✓
Singular Label	Department
Plural Label	Departments
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

Travel Approval

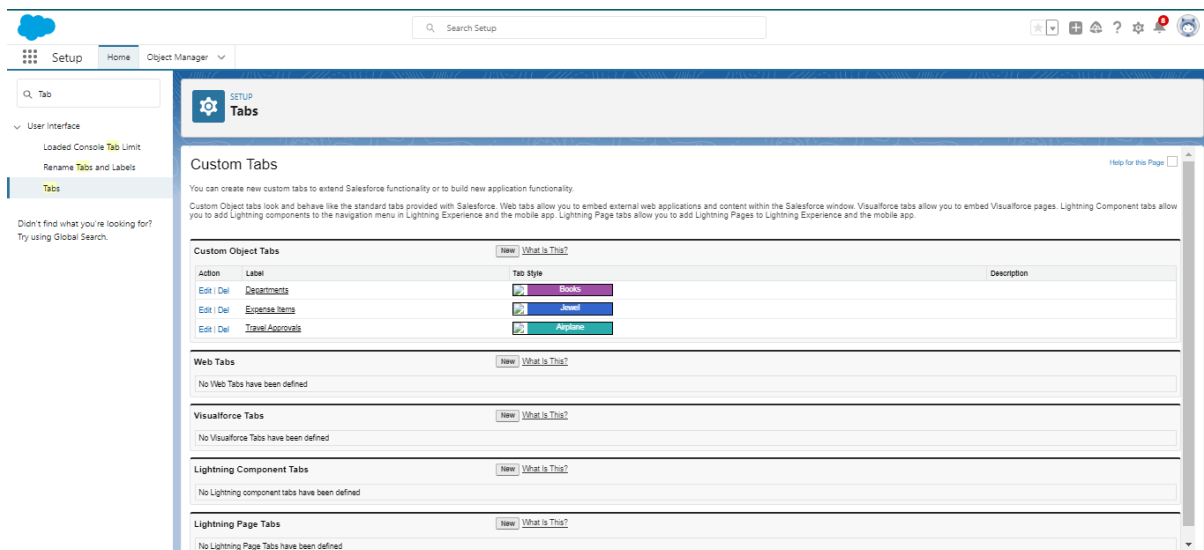


Expenses Item



Milestone 4 – Tab

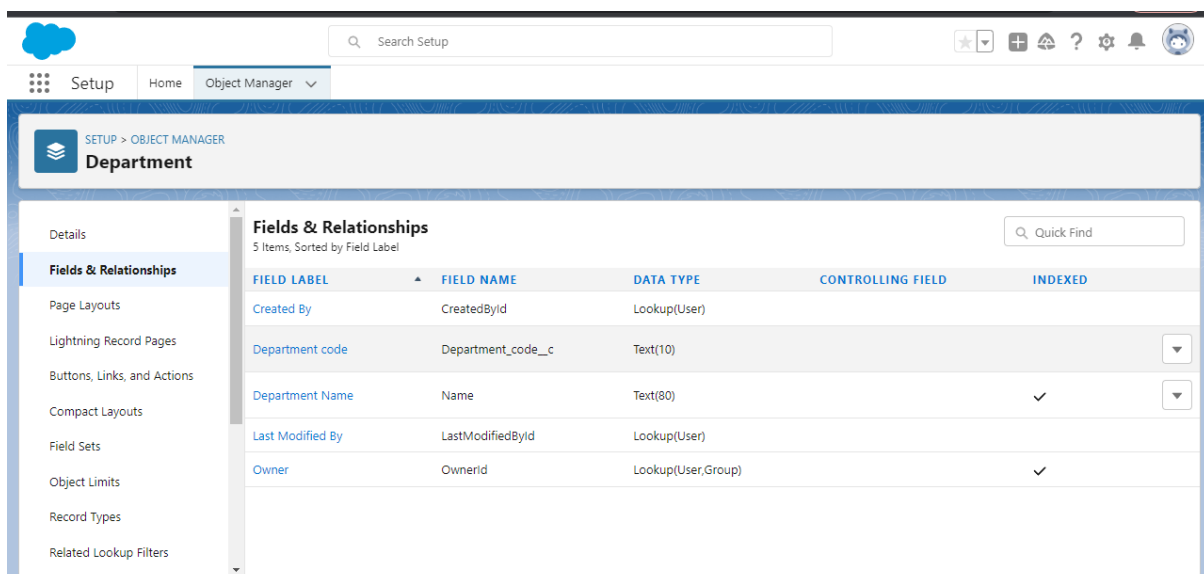
Tab in Salesforce help users to view the information at a glance. It displays the data of objects and other web content in the application.



Milestone 5 – Create- Fields and Relationships:

Fields in Salesforce represents about the columns in relational databases mean. It can store data values which are required for a particular object in a record.

Department



Travel Approval

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Travel Approval

Details

Fields & Relationships

13 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)		
Status	Status__c	Picklist		
Status Indicator	Status_Indicator__c	Formula (Text)		
Total Expenses	Total_Expenses__c	Roll-Up Summary (SUM Expense Item)		
Travel Approval	Name	Auto Number		✓
Trip End Date	Trip_End_Date__c	Date		
Trip Start Date	Trip_Start_Date__c	Date		

Expenses Item

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Expense Item

Details

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

New

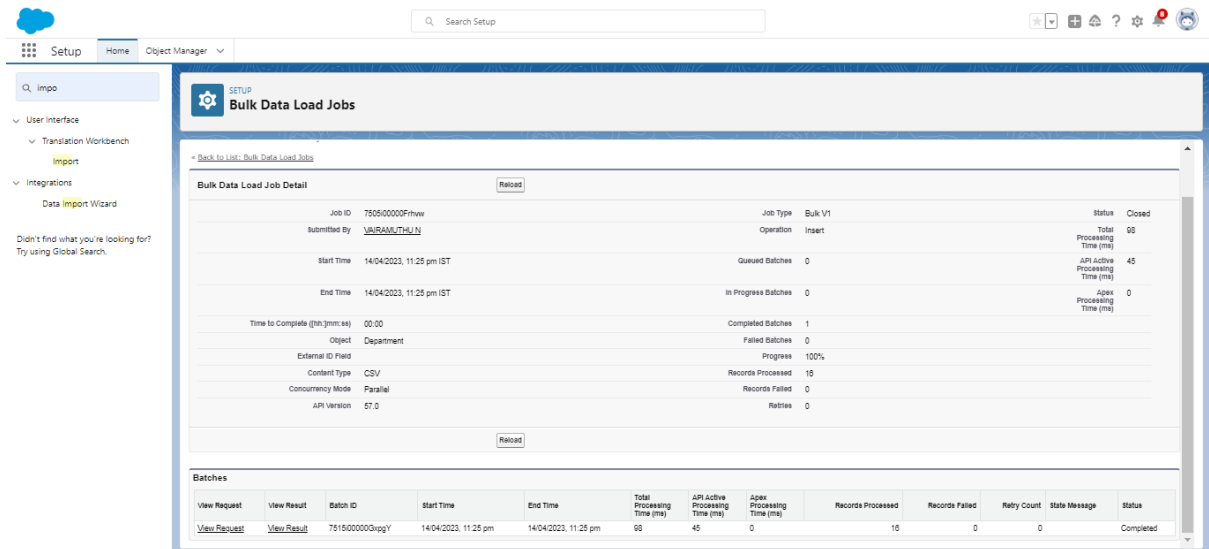
Deleted Fields

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 Number	Name	Auto Number		✓
Expense type	Expense_type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Travel Approval	Travel_Approval__c	Master-Detail(Travel Approval)		✓

Milestone 6 – Import Departments



The screenshot shows the Salesforce Setup interface with the 'Bulk Data Load Jobs' page. The left sidebar shows the navigation menu with 'Setup' selected. The main content area displays a 'Bulk Data Load Job Detail' for a job with ID 750500000Fhrw. The job is submitted by 'N. VAI RAMUTHU' and is in the 'Insert' operation. The job is completed, with a status of 'Closed'. The 'Batches' table shows one batch with ID 7515000000rpgY, which is completed.

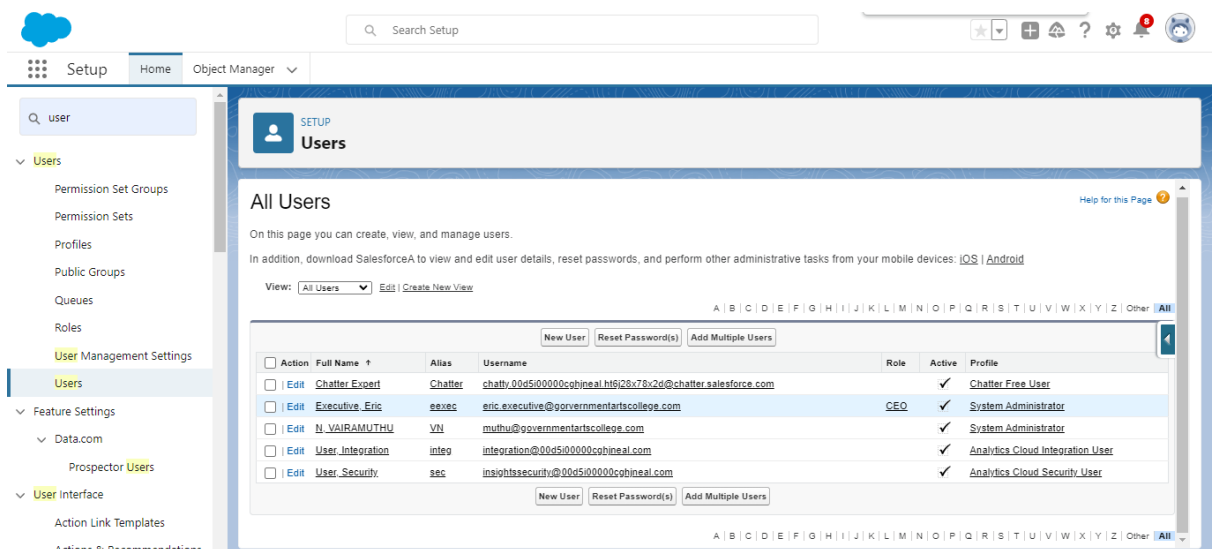
Job ID	Submitted By	Job Type	Operation	Status	Total Processing Time (ms)
750500000Fhrw	N. VAI RAMUTHU	Bulk V1	Insert	Closed	98

Start Time	End Time	Guessed Batches	In Progress Batches	Completed Batches	Failed Batches	Progress	Records Processed	Records Failed	Records Retried
14/04/2023, 11:25 pm IST	14/04/2023, 11:25 pm IST	0	0	1	0	100%	15	0	0

Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
7515000000rpgY	14/04/2023, 11:25 pm	14/04/2023, 11:25 pm	98	45	0	15	0	0		Completed

Milestone 7- Customize User Interspace

In this Milestone we have setup the users, customizing the page layout.

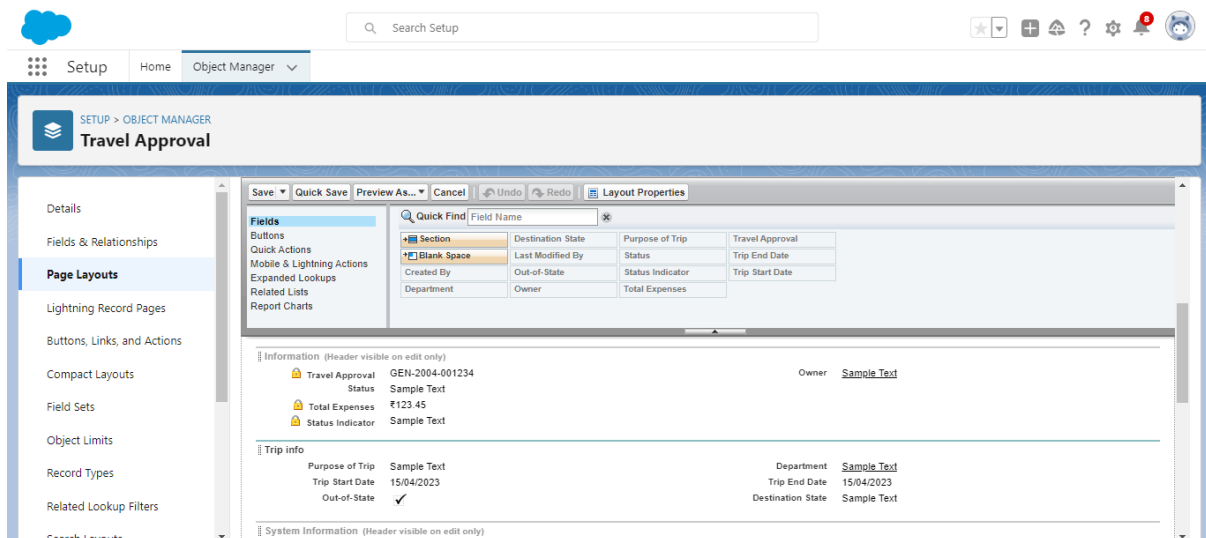
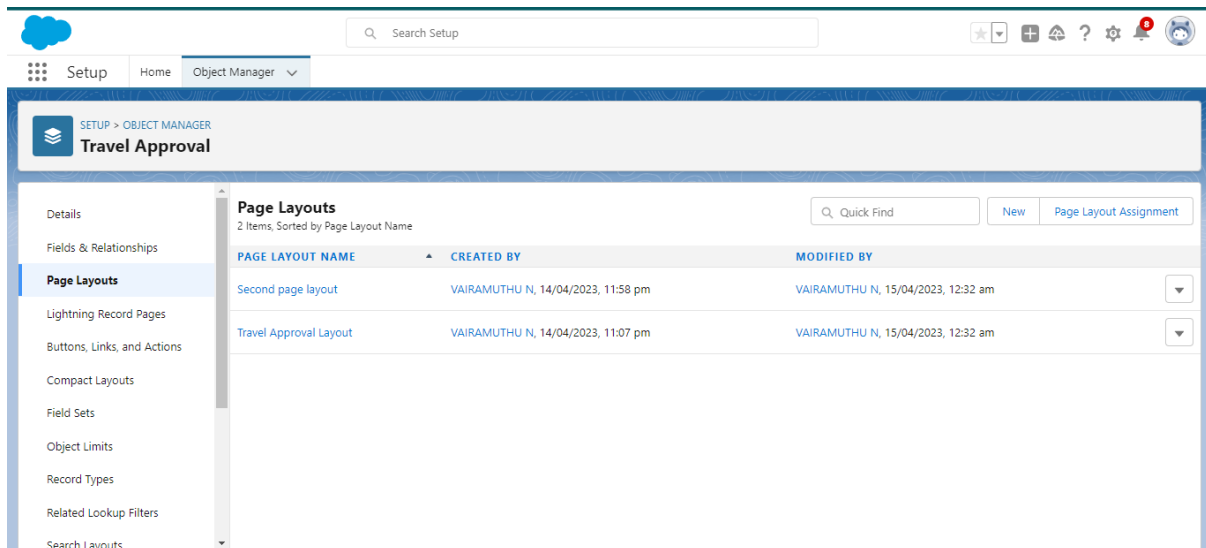


The screenshot shows the Salesforce Setup interface with the 'Users' page. The left sidebar shows the navigation menu with 'Setup' selected. The main content area displays the 'All Users' page, which lists the users created in the system. The users are listed in a table with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are Chatter Expert, Executive Eric, N. VAI RAMUTHU, User Integration, and User Security.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d5i00000cphineal1h9i28x78x2d@chatter.salesforce.com		✓	Chatter Free User
Edit	Executive Eric	erexec	eric.executive@governmentartscollege.com	CEO	✓	System Administrator
Edit	N. VAI RAMUTHU	VN	nmuthu@governmentartscollege.com		✓	System Administrator
Edit	User Integration	intego	integration@00d5i00000cphineal.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00d5i00000cphineal.com		✓	Analytics Cloud Security User

Milestone 8 – Use customization

In this Milestone we have to customized Travel Approval Object Page Layout



Milestone 9 –Add Business Logic to Travel App

In this Milestone we have created validation rules, rollup summary fields, formula fields, workflows and approval process.

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Avatar

Setup > OBJECT MANAGER

Travel Approval

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

Travel Approval Validation Rule

Back to Travel Approval

Help for this Page

Validation Rule Detail

Edit

Clone

Rule Name	Trip_end_date_after_start_date	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Trip_End_Date__c < Trip_Start_Date__c		
Error Message	Trip end date must be greater than or equal to start date	Error Location	Trip End Date
Description			
Created By	VAIRAMUTHU N	Modified By	VAIRAMUTHU N
	15/04/2023, 12:23 am		15/04/2023, 12:23 am

Edit

Clone

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Avatar

Setup > OBJECT MANAGER

Travel Approval

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

Scoping Rules

Travel Approval Custom Field

Total Expenses

Back to Travel Approval

Help for this Page

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information		Object Name	Travel Approval
Field Label	Total Expenses		
Field Name	Total_Expenses		
API Name	Total_Expenses__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	VAIRAMUTHU N	Modified By	VAIRAMUTHU N
	15/04/2023, 12:28 am		15/04/2023, 12:28 am

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	SUM
Summarized Object	Expense Item		
Field to Aggregate	Expense Item Amount		
Filter Criteria			

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Avatar

Setup

Static Resources

static

Custom Code

Static Resources

Didn't find what you're looking for?

Try using Global Search.

Static Resource

StatusImages

Help for this Page

Static Resource Detail

Edit

Delete

Where is this used?

Name	StatusImages
Namespace Prefix	
Description	
MIME Type	application/x-zip-compressed
Cache Control	Public
Size	39,130 bytes
	View file
Created By	VAIRAMUTHU N
	15/04/2023, 12:28 am
Last Modified By	VAIRAMUTHU N
	15/04/2023, 12:28 am

Edit

Delete

Where is this used?

Milestone 10- Reports

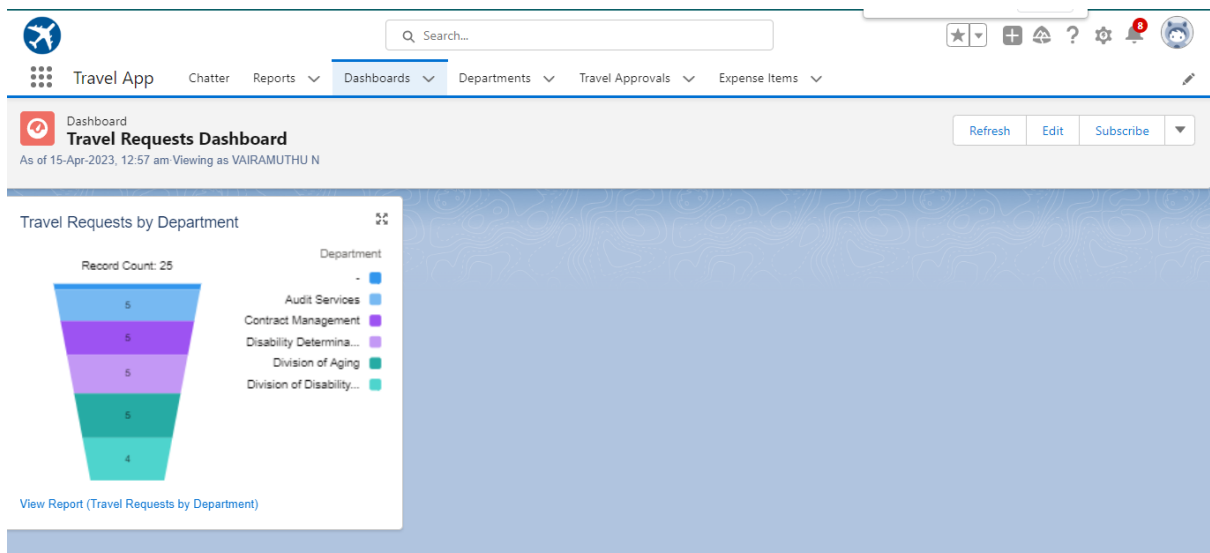
Report: Travel Approvals
Travel Requests by Department

Total Records: 72 Total Out-of-State: 1

Department	Travel Approval	Status	Out-of-State	Destination State	Trip Start Date	Trip End Date
- (1)	TA-0001	New	1	-	15/04/2023	15/04/2023
Subtotal			1			
Audit Services (5)	TA-00024	Approved	0	OK	09/03/2019	09/03/2019
	TA-00032	Approved	0	OK	07/08/2019	07/09/2019
	TA-00040	Approved	0	FL	08/07/2019	08/07/2019
	TA-00044	Approved	0	OK	11/04/2019	11/07/2019
	TA-00049	Approved	0	OK	07/08/2019	07/08/2019
Subtotal			0			
Contract Management (5)	TA-00009	Approved	0	OK	05/11/2019	05/11/2019
	TA-00034	Approved	0	GA	02/09/2019	02/09/2019
	TA-00066	Approved	0	TX	07/04/2019	07/04/2019
	TA-00067	Approved	0	CA	07/05/2019	07/08/2019
	TA-00070	Approved	0	TX	04/04/2019	04/04/2019
Subtotal			0			
Disability Determination Bureau (3)	TA-00002	Approved	0	OK	10/01/2019	10/01/2019
	TA-00008	Rejected	0	OK	03/06/2019	03/07/2019

Row Counts: ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

Milestone 11- Dashboard



4.Trailhead Profile Public URL

Team Lead – <https://trailblazer.me/id/nvairam>

Team Member 1-<http://trailblazer.me/id/prakash9025>

Team Member 2-<https://trailblazer.me/id/k20bma031>

Team Member 3-<https://trailblazer.me/id/vikesh46>

5. Advantages:

- New experience
- Gain my knowledge
- Quick service

Disadvantages:

- It will be time consuming
- Team coordination will it cause in convenient

6. APPLICATIONS:

The Travel Support System is a small sample application for Natural ONE. 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 us 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.

7. CONCLUSION:

Travel Management simplifies the management process in traveling. Fast processing and immediate results with high security. Minimizing women effort and cost efficient databases. Navigation through the site is easy. It becomes increasingly popular destinations in their own right.

8. FUTURE SCOPE:

It is clear that the online travel business is a booming industry and will continue to be so. Rising to the occasion, even small travel agency owners are also looking to go online. For them, an online travel portal can be an ideal fit.