

# Project Report Template

## BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

### 1. Introduction :

#### 1.1. Overview

*Travel Approval Request App will help users quickly send a "Travel Request" through mobile using Power Apps. Level 1 Managers and Level 2 Managers can review the request and take actions from the same Power Apps through mobile.*

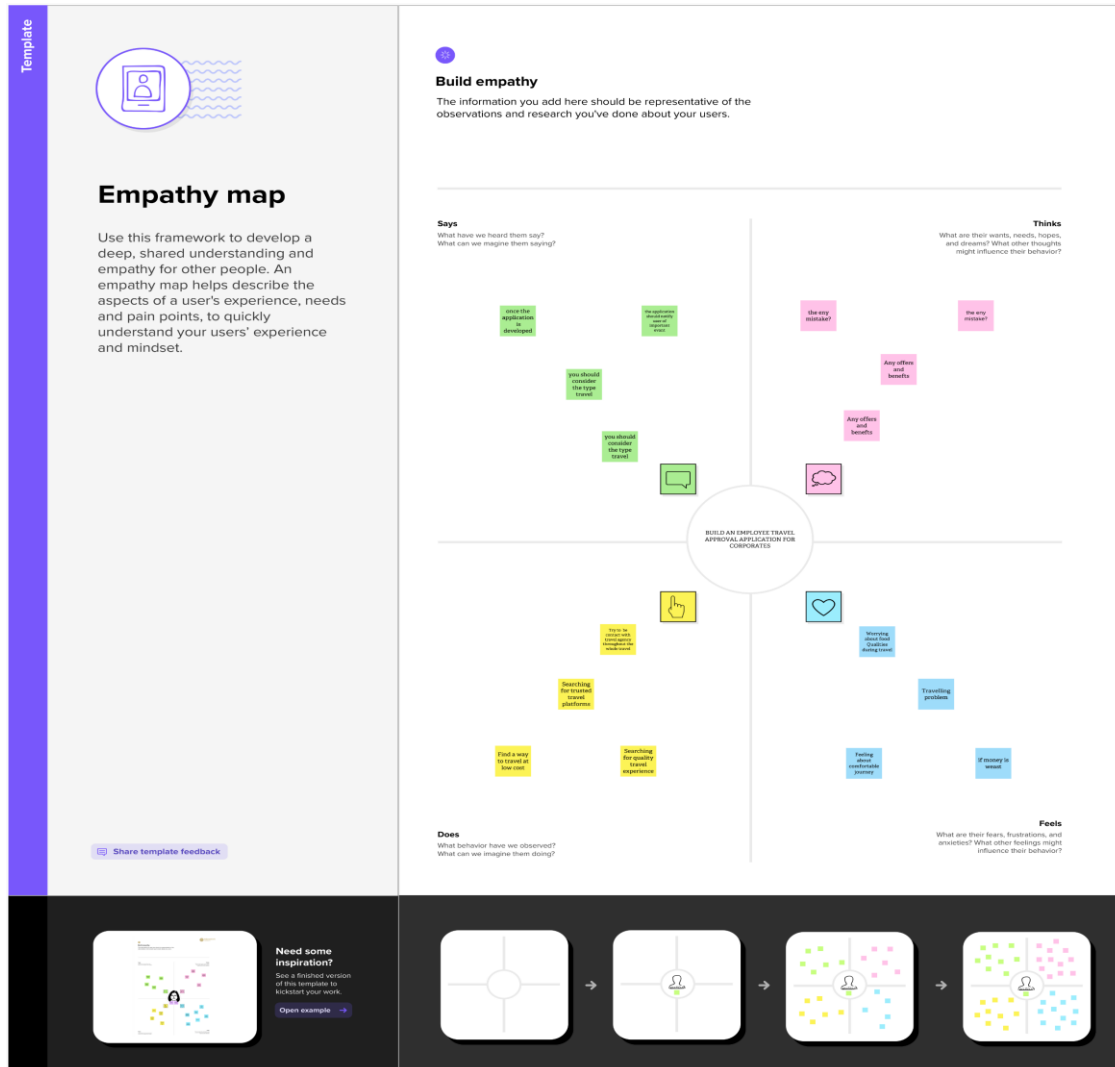
#### 1.2. Purpose

*The purpose of our project is to provide customers with a clear vision of*

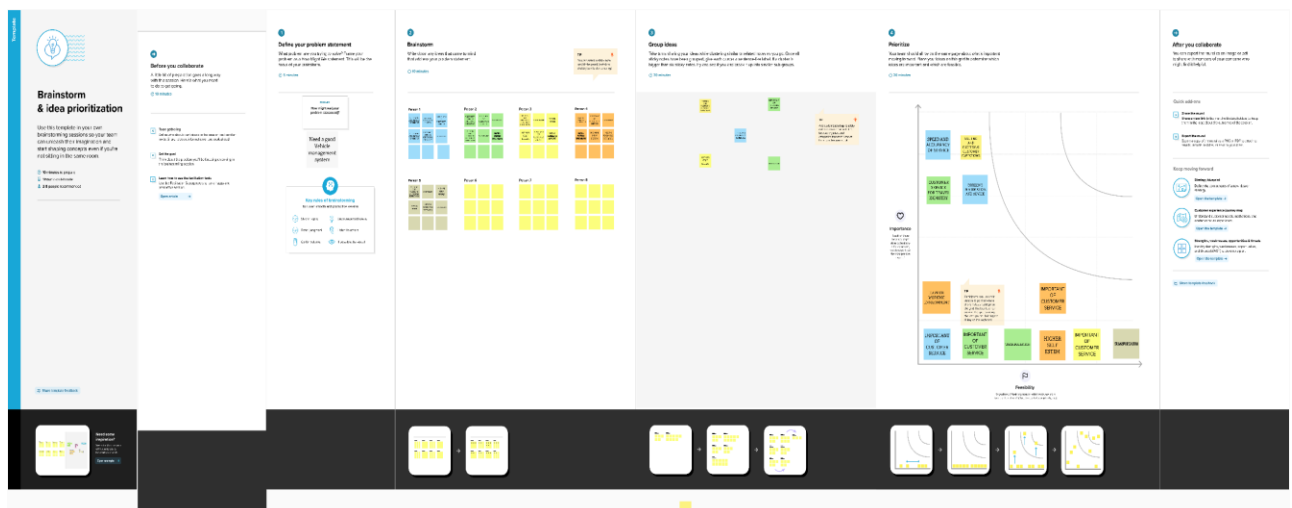
- ❖ *Build An Employee Travel Approval Application For Corporates*  
*The main objective of pre-trip approval is to control undesirable travel buying behaviours of employees and cost.*
- ❖ *The approver verifies the travel request according to the travel policy of the corporate and decides to approve or decline.*
- ❖ *defines the process and the eligibility for travel within and outside the country on business visits*
- ❖ *Helps organizers plan, Execute, Report on Travel, Driving successful*
- ❖ *It should give a guaranteed good satisfaction.*

## 2. Problem Definition & Design Thinking :

### 2.1. Empathy Map For Build an Event Management Using Salesforce



### 2.2. Ideation & Brainstorming Map



### 3. RESULT :

#### 3.1. Data Model :

Objects	Fields in the Object	
Department		
	<b>Field Label</b>	<b>Data Type</b>
	Department Name	Text
	Department Code	Text
Travel Approval		
	<b>Field Label</b>	<b>Data Type</b>
	Travel Approval	Auto Number
	Travel Approval	Master-Detail Relationship
	Department	Look-up Relationship
	Expencc	Picklist
	Amount	Currency
	Status Indicator	Formula
	Destination State	Text
	Out of State	Checkbox
	Trip Start Date	Date
	Trip End Date	Date
	Status	Picklist
	Purpose Trip	Text Area
Expense Item		
	<b>Field Label</b>	<b>Data Type</b>
	Expense Item Name	Text

## 3.2. Activity & Screenshot

### 3.2.1. Objects :

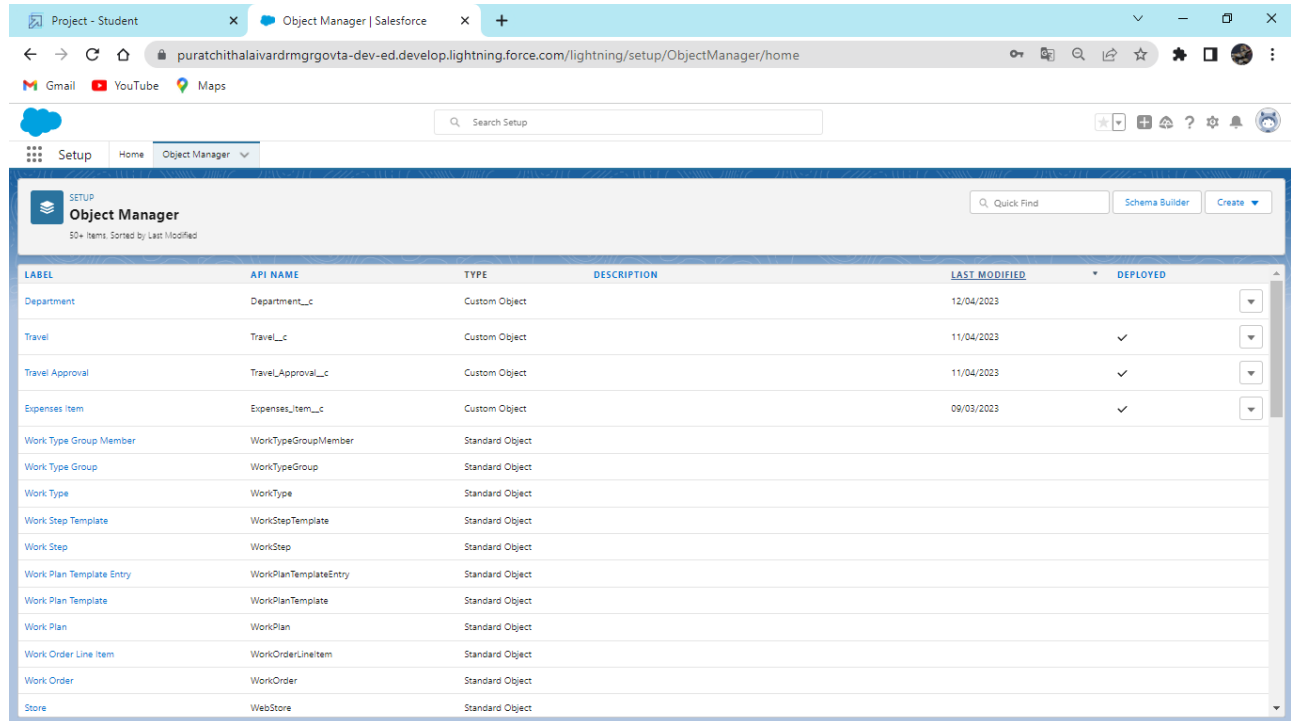
*Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).*

*Salesforce objects are of two types :*

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

### Creation of Custom Objects :

- **Department**
- **Travel Approval**
- **Expense Item**



The screenshot shows the Salesforce Object Manager interface. The browser address bar indicates the URL: `puratchithalaivardmrgovta-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The interface includes a search bar, a 'Schema Builder' button, and a 'Create' button. Below these, there is a table listing objects. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed include Department, Travel, Travel Approval, Expenses Item, and several standard objects like Work Type Group Member, Work Type Group, Work Type, Work Step Template, Work Step, Work Plan Template Entry, Work Plan Template, Work Plan, Work Order Line Item, Work Order, and Store.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Department	Department__c	Custom Object		12/04/2023	
Travel	Travel__c	Custom Object		11/04/2023	✓
Travel Approval	Travel_Approval__c	Custom Object		11/04/2023	✓
Expenses Item	Expenses_Item__c	Custom Object		09/03/2023	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			
Work Step	WorkStep	Standard Object			
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object			
Work Plan Template	WorkPlanTemplate	Standard Object			
Work Plan	WorkPlan	Standard Object			
Work Order Line Item	WorkOrderLineItem	Standard Object			
Work Order	WorkOrder	Standard Object			
Store	WebStore	Standard Object			

### 3.2.2. Tab :

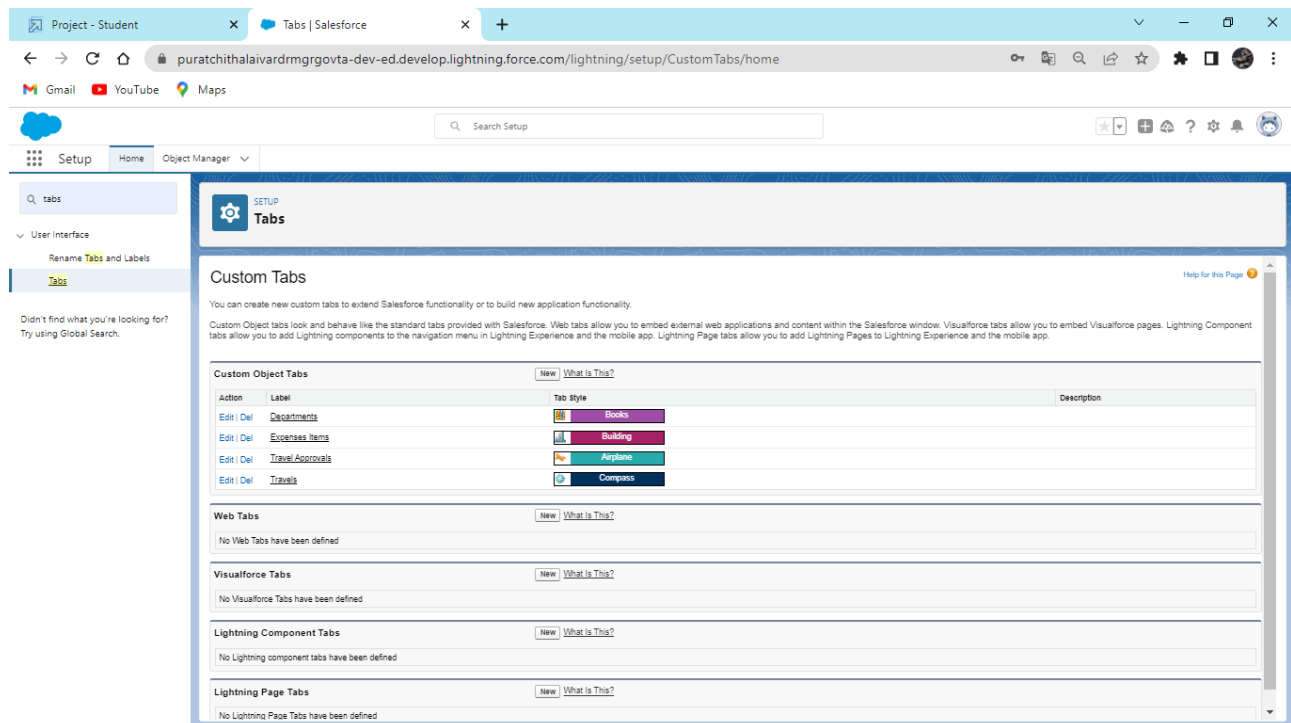
*Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.*

There are mainly 4 types of tabs:

- **Standard Object Tabs:** Standard object tabs display data related to standard objects.
  - **Custom Object Tabs:** Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.
  - **Web Tabs:** Web Tabs display any external Web-based application or Web page in a Salesforce tab.
  - **Visualforce Tabs:** Visualforce Tabs display data from a Visualforce Page.
- NOTE: we won't be dealing with web tabs and visualforce tabs later.

### Creation of Tabs :

- **Department Tab**
- **Travel Approval Tab**
- **Expense Item Tab**
- **Travel Tab**



### 3.2.3. Application

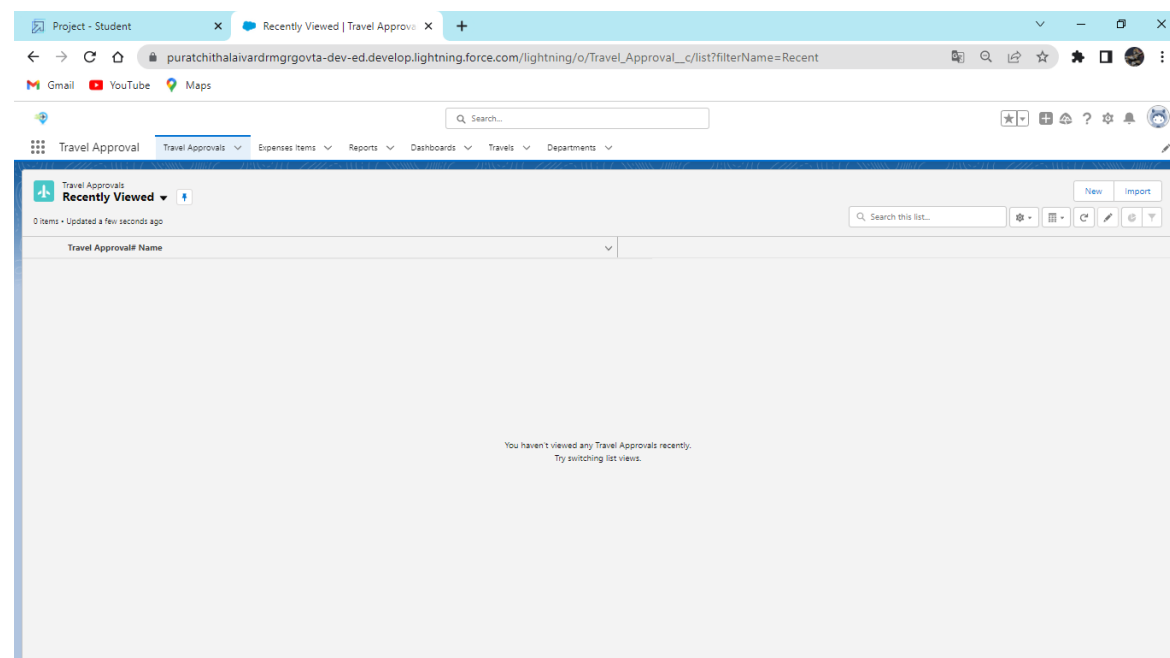
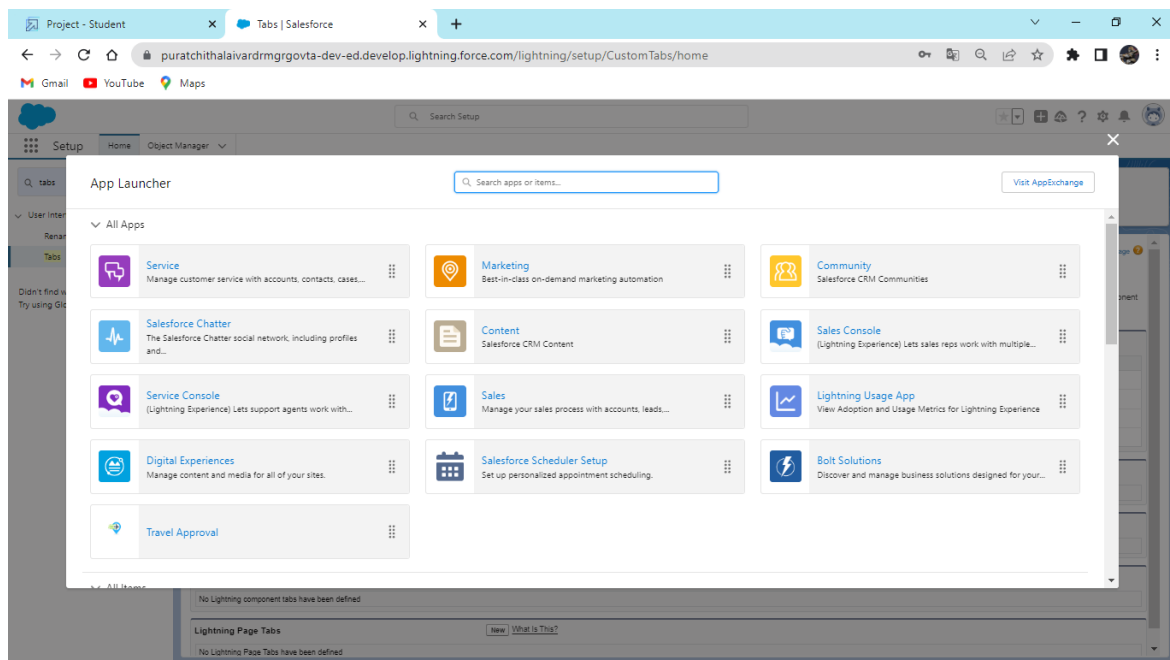
*Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.*

*There are 2 types of Salesforce applications:*

- **Standard apps:** these apps come with every occurrence of Salesforce as default. Community, Call Center, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.
- **Custom apps:** these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

### **Creation of the Construction app :**

#### ➤ **Travel Approval**



### 3.2.4. Fields

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

*There are 2 types of fields in salesforce:*

- *Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.*
- *Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.*

#### **Creation of Fields**

- **Department**
- **Travel Approval**
- **Expense Item**

#### **Creation of fields for the Department objects**

The screenshot shows the Salesforce Setup interface for the 'Department' object. The left sidebar contains a navigation menu with options like 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, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Fields & Relationships' and shows a table of fields for the 'Department' object. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Owner, Department Name, Department Code, Last Modified By, and Created By.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Owner	OwnerId	Lookup(User,Group)		✓
Department Name	Name	Text(80)		✓
Department Code	Department_Code__c	Text(10) (Unique Case Sensitive)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Created By	CreatedBy	Lookup(User)		

## Creation of fields for the Travel Approval objects

Travel Approval | Salesforce

puratchithalaivardmrgovta-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000035wmi/FieldsAndRelationships...

67% Reset

Setup Home Object Manager

SETUP > OBJECT MANAGER

Travel Approval

Details

Fields & Relationships  
14 items, Sorted by Indexed

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Travel Approval# Name	Name	Auto Number		✓
Travel	Travel__c	Master-Detail(Travel)		✓
Department	Department__c	Lookup(Department)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Created By	CreatedBy	Lookup(User)		
Expense	Expense__c	Picklist		
Amount	Amount__c	Currency(16, 2)		
Status Indicator	Status_Indicator__c	Formula (Text)		
Destination State	Destination_State__c	Text(2)		
Out-of-State	Out_of_State__c	Checkbox		
Trip End Date	Trip_End_Date__c	Date		
Trip Start Date	Trip_Start_Date__c	Date		
Status	Status__c	Picklist		
Purpose of Trip	Purpose_of_Trip__c	Text Area(255)		

## Creation of fields for the objects

Expenses Item | Salesforce

puratchithalaivardmrgovta-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000035wra/FieldsAndRelationships...

Setup Home Object Manager

SETUP > OBJECT MANAGER

Expenses Item

Details

Fields & Relationships  
4 items, Sorted by Indexed

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

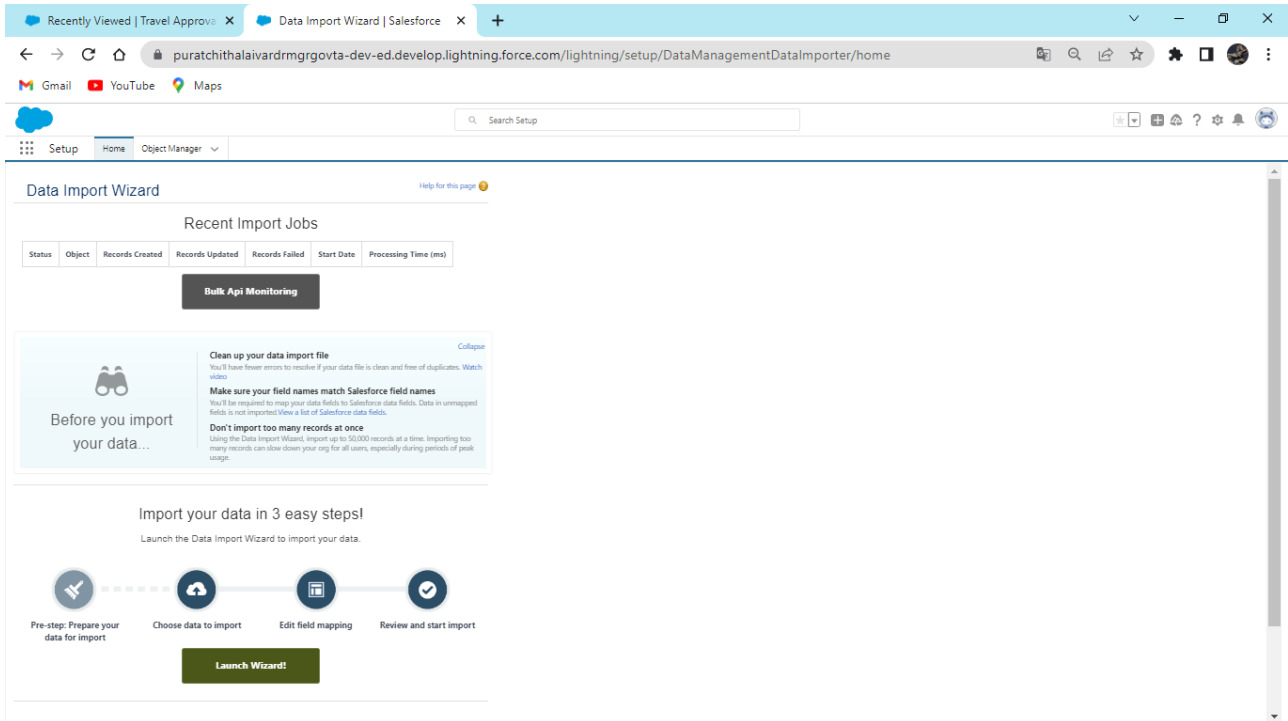
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Owner	OwnerId	Lookup(User:Group)		✓
Expenses Item Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Created By	CreatedBy	Lookup(User)		



### 3.2.5. Import Departments

In order to complete this milestone, you need to download the reference file

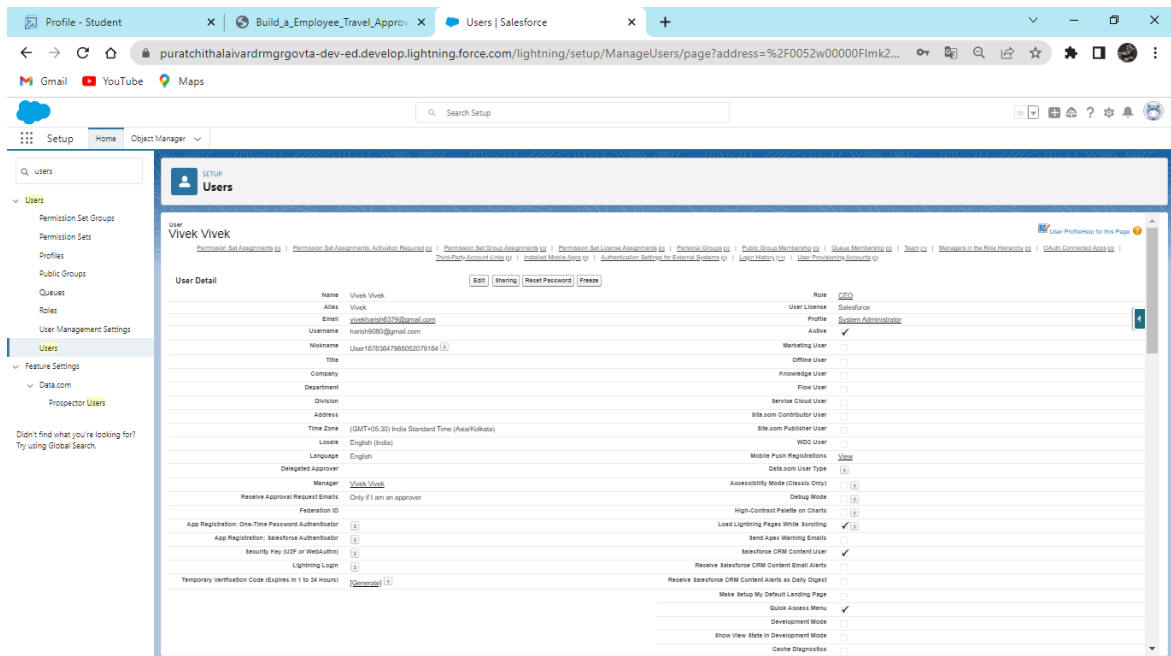
#### Data Import



### 3.2.6. Customize User Interface

In this Milestone we are going to setup the users, customizing the page layouts

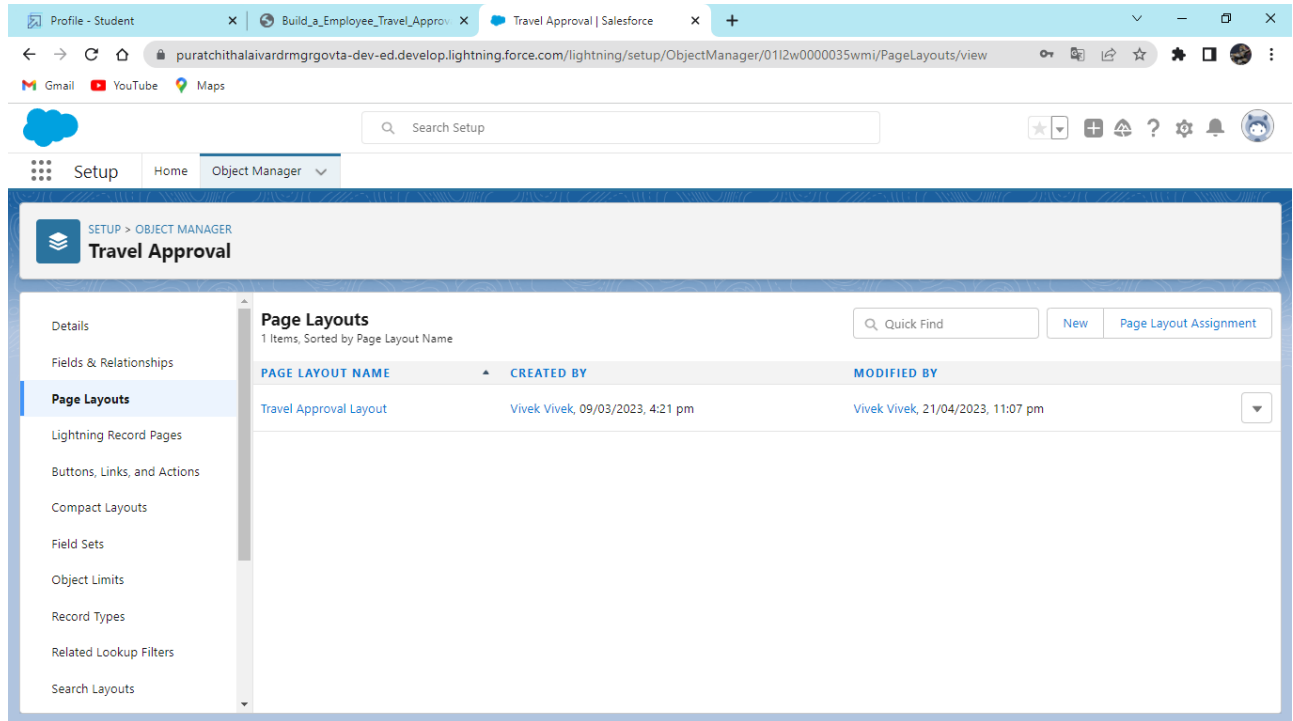
#### Create User and Setup Approvals



### 3.2.7. 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.

### Creation of Customize Travel Approval Object Page layout



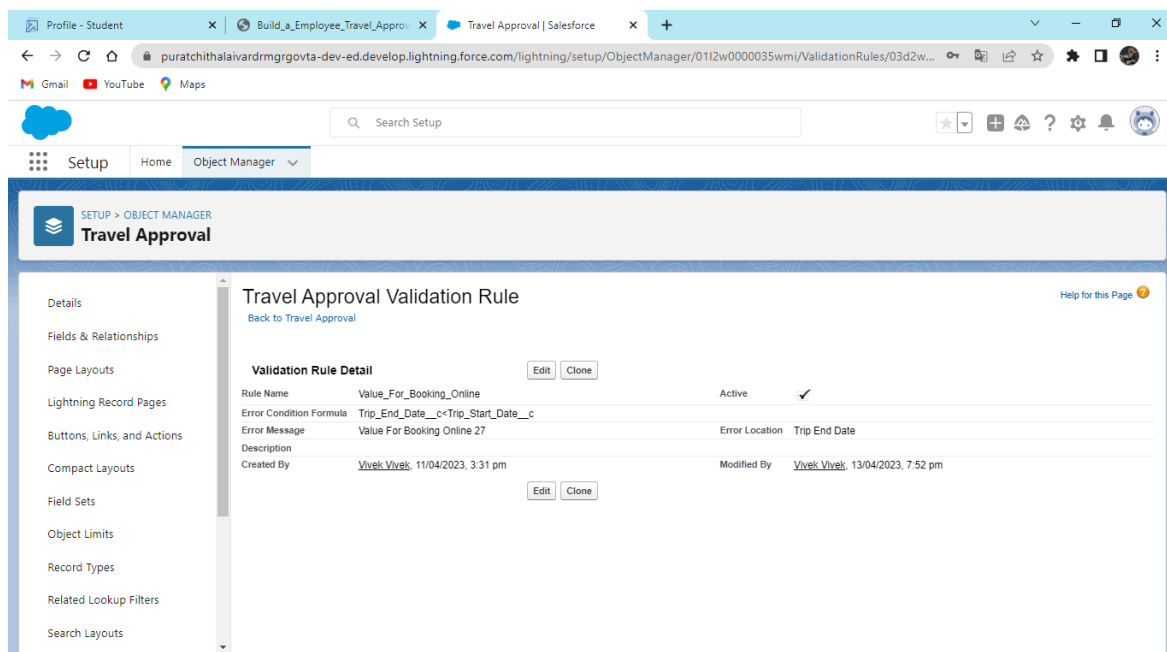
The screenshot shows the Salesforce Setup interface for the 'Travel Approval' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Page Layouts' and shows a table with one item, 'Travel Approval Layout'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'Travel Approval Layout' was created by 'Vivek Vivek' on 09/03/2023 at 4:21 pm and was last modified by 'Vivek Vivek' on 21/04/2023 at 11:07 pm. There are 'Quick Find', 'New', and 'Page Layout Assignment' buttons at the top right of the table.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Travel Approval Layout	Vivek Vivek, 09/03/2023, 4:21 pm	Vivek Vivek, 21/04/2023, 11:07 pm

### 3.2.8. Add Business Logic to Travel App

From this milestone we are going to create validation rules, rollout summary fields, formula fields, workflows and approval process.

### Create Validation Rule



The screenshot shows the Salesforce Setup interface for the 'Travel Approval' object, specifically the 'Validation Rules' section. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Travel Approval Validation Rule' and shows a table with one item, 'Travel Approval Validation Rule'. The table has columns for 'Rule Name', 'Error Condition Formula', 'Error Message', 'Description', 'Created By', 'Modified By', and 'Active'. The 'Travel Approval Validation Rule' was created by 'Vivek Vivek' on 11/04/2023 at 3:31 pm and was last modified by 'Vivek Vivek' on 13/04/2023 at 7:52 pm. The 'Active' checkbox is checked. There are 'Edit' and 'Clone' buttons at the top right of the table.

Rule Name	Error Condition Formula	Error Message	Description	Created By	Modified By	Active
Travel Approval Validation Rule	Value_For_Booking_Online	Trip_End_Date__c<Trip_Start_Date__c	Value For Booking Online 27	Vivek Vivek, 11/04/2023, 3:31 pm	Vivek Vivek, 13/04/2023, 7:52 pm	<input checked="" type="checkbox"/>

## Create RollUp Summary Fields

Profile - Student | Build\_a\_Employee\_Travel\_Approval | Object Manager | Salesforce

puratchithalaivardmrgovta-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000035wmi/FieldsAndRelationships...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Travel Approval**

Details

**Fields & Relationships**

14 Items, Sorted by Indexed

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

## Create Formula Fields

Profile - Student | Build\_a\_Employee\_Travel\_Approval | Static Resources | Salesforce

puratchithalaivardmrgovta-dev-ed.develop.lightning.force.com/lightning/setup/StaticResources/page?address=%2F0812w000002ivJM

Search Setup

Setup Home Object Manager

Static Resources

Static Resource  
**StatusImages**

Help for this Page

Static Resource Detail

Edit Delete Where is this used?

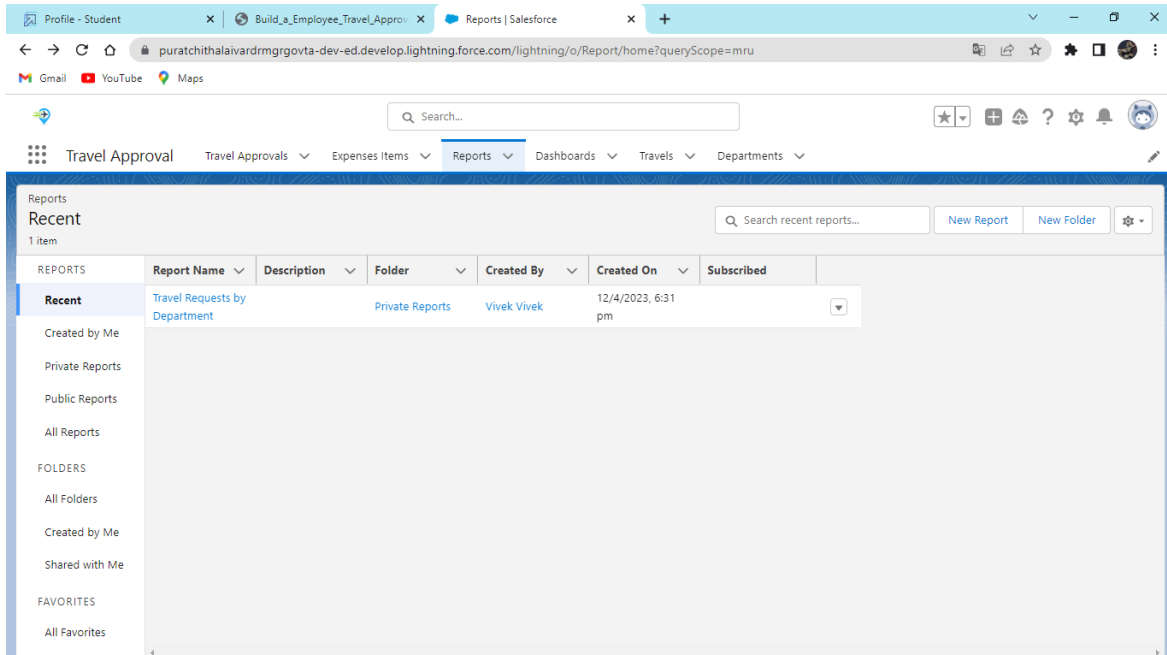
Name	StatusImages
Namespace Prefix	
Description	
MIME Type	application/zip
Cache Control	Private
Size	57,029 bytes
	<a href="#">View file</a>
Created By	Vivek Vivek 11/04/2023, 5:01 pm
Last Modified By	Vivek Vivek 11/04/2023, 5:02 pm

Edit Delete Where is this used?

### 3.2.9. Reports

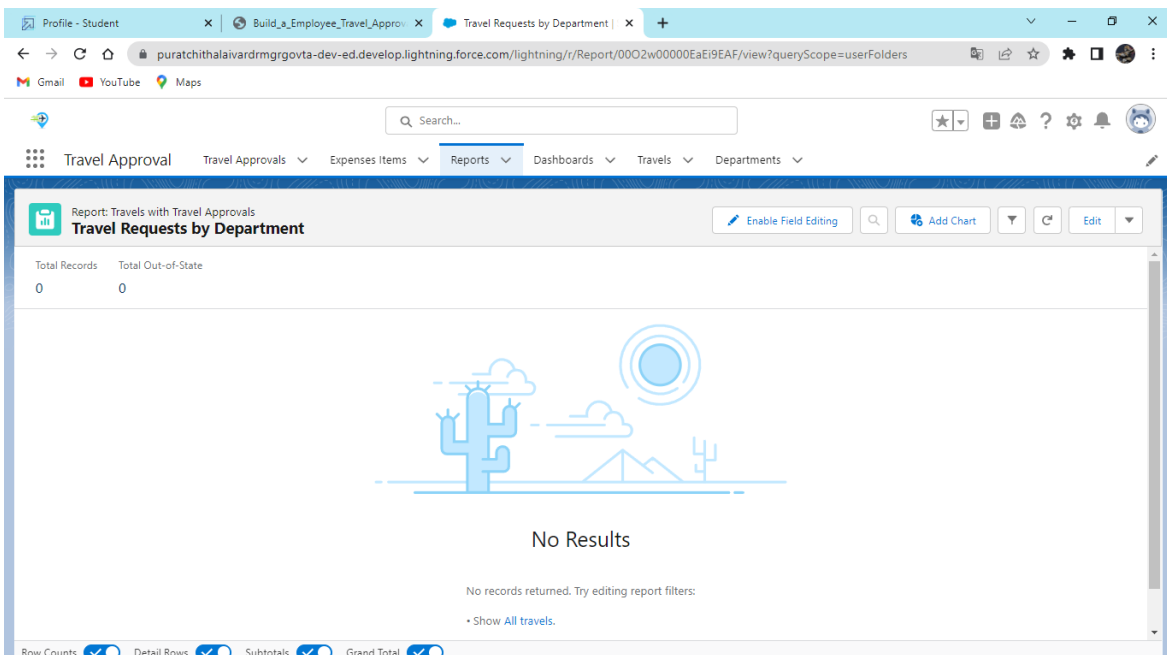
Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

#### Creating a Report



The screenshot shows the Salesforce Reports page. The browser tabs include 'Profile - Student', 'Build\_a\_Employee\_Travel\_Appro...', and 'Reports | Salesforce'. The URL is 'puratchithalaivardmrgovta-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru'. The page header shows 'Travel Approval' and a navigation menu with 'Travel Approvals', 'Expenses Items', 'Reports', 'Dashboards', 'Travels', and 'Departments'. The 'Reports' section is active, showing a 'Recent' report list with 1 item. The report is titled 'Travel Requests by Department' and is located in the 'Private Reports' folder, created by 'Vivek Vivek' on '12/4/2023, 6:31 pm'. The left sidebar shows a navigation menu with 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Travel Requests by Department		Private Reports	Vivek Vivek	12/4/2023, 6:31 pm	



The screenshot shows the Salesforce Report 'Travel Requests by Department'. The browser tabs include 'Profile - Student', 'Build\_a\_Employee\_Travel\_Appro...', and 'Travel Requests by Department'. The URL is 'puratchithalaivardmrgovta-dev-ed.develop.lightning.force.com/lightning/r/Report/00Q2w00000EaEi9EAF/view?queryScope=userFolders'. The page header shows 'Travel Approval' and a navigation menu with 'Travel Approvals', 'Expenses Items', 'Reports', 'Dashboards', 'Travels', and 'Departments'. The 'Reports' section is active, showing the report 'Travel Requests by Department'. The report is titled 'Report: Travels with Travel Approvals' and is located in the 'Private Reports' folder, created by 'Vivek Vivek' on '12/4/2023, 6:31 pm'. The left sidebar shows a navigation menu with 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'. The report shows 'Total Records: 0' and 'Total Out-of-State: 0'. The report is currently empty, displaying a 'No Results' message with a cactus illustration. The message states 'No records returned. Try editing report filters: • Show All travels.' The bottom of the page shows a navigation bar with 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total' all checked.

Report: Travels with Travel Approvals	
Total Records	0
Total Out-of-State	0

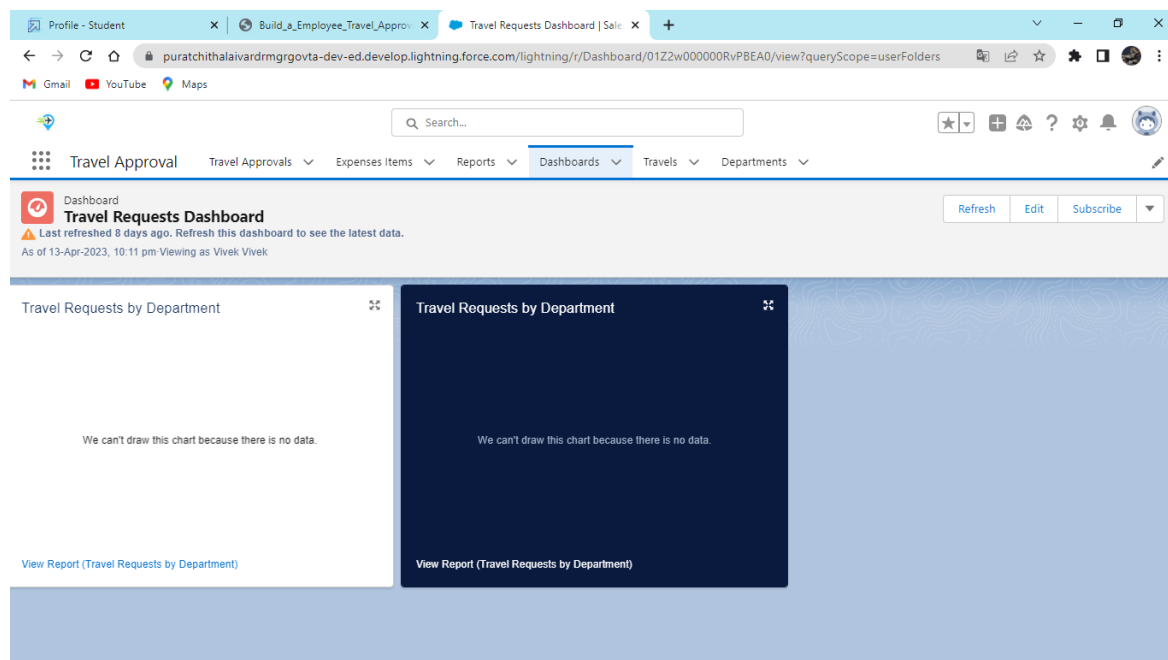
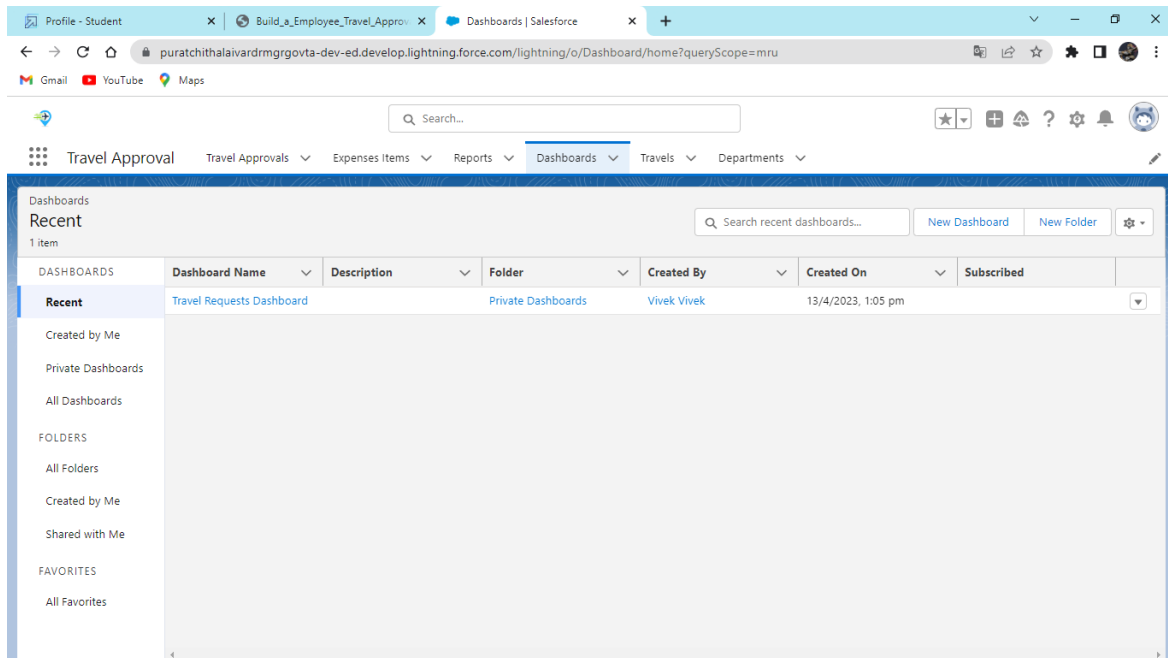
No Results

No records returned. Try editing report filters:  
• Show All travels.

### 3.2.10. 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.

#### Creating a Dashboards



#### **4. Trailhead Profile Public URL :**

- Team Lead** - <https://trailblazer.me/id/fvivek1>
- Team Member 1** - <https://trailblazer.me/id/tvanan11>
- Team Member 2** - <https://trailblazer.me/id/kvasanth143>
- Team Member 3** - <https://trailblazer.me/id/uyukesh>
- Team Member 4** - <https://trailblazer.me/id/dshanmugam14>

#### **5. ADVANTAGES & DISADVANTAGES :**

##### **ADVANTAGES:**

- ❖ *Business travel is a great way to develop new skills and refine existing ones.*
- ❖ *From public speaking, adaptability, time management, networking, and best of all, confidence—the knowledge and skills built with business travel are essential to a successful career.*
- ❖ *Customer's can also understand the vehicle well with the help of another users review.*
- ❖ *Adventures And New Experiences. Without a doubt, the biggest plus to traveling is all of the new experiences you will get across the world.*
- ❖ *Experience New Cultures. ...*
- ❖ *Personal Growth. ...*
- ❖ *Lower Cost Of Living. ...*
- ❖ *Make New Friends*
- ❖ *It Can Be Expensive. ...*
- ❖ *Sickness. ...*
- ❖ *It Can Be Lonely.*

##### **DISADVANTAGES:**

- ❖ *Expensive - Roundtrip tickets, hotel accommodation, meals and reservations; they are the popular expenditures of executives out on a small business trip.*
- ❖ *Though these expenses usually do not come inexpensive, business travel also lasts to get a couple of days.*
- ❖ *long distances overland can take more time.*

## **6. APPLICATIONS :**

- ❖ *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*

## **7. CONCLUSION :**

- ❖ *Online travel agents are the most promising travel provider for the experience economy.*
- ❖ *The World Trotter Travel Agency demonstrates our vision of how this technology can be employed*

## **8. FUTURE SCOPE :**

- ❖ *A travel agency is a private retailer or public service that provides travel and tourism related services to the public on behalf of suppliers such as activities, airlines, car rentals, cruise lines, hotels, railways, travel insurance, and package tours.*

