BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

1.INTRODUCTION:

1.1 OVERVIEW:

Salesforce platform is a Cloud based technology platform that enables business to Build,integrate,and deploy custom applications and solutions that meet their specific needs. It is a comprehensive platform that provides tools and services for application development,data integration, mobile app development,and more,At its core sales force platform is built on a multi-tenant architecture that allows multiple customer to share the same infrastructure and resources.Salesforce is your customer success platform, designed to help you sell, service, market, Analyze, and connect with your customers.Salesforce has everything you need to run your business from anywhere.

It includes some milestones and activities .1).If first milestone we create a sales force developer organization . A developer org has all the features and lisence you need to get started with Salesforce.2).if second milestone we activation application.The AppManager is your go to place for managing apps for lightning experience. It shows all Your connected apps and salesforce apps. Use the lightning experience app manager to view all Your salesforce apps.3).if third milestone we create object.Two types of objects in sales force.it is a standard object and custom object .

- Standard Objects: Standard objects are the kind of objects that are provided bySalesforce.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.

4).If fourth milestone we create an 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 Displays data related to standard objects.

Custom Object Tabs:

Custom object tabs Displays 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.

If fourth milestone we create Fields & Relationship.What are 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 andthey 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.

5).If we have to create import Departments in fifth milestone.In order to complete this milestone, you need to download the reference file.This milestone is used for custom object.

6).If we have to create customise User Interface.In this Milestone we are going to setup the users, customizing the page layouts.this activity is create user and setup approvals.

7).If seventh milestone we create 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.

8).Next we have to create Add Business Logic To Travel App.From this milestone we are going to create validation rules, rollup summary fields, formula Fields, workflows and approval process.

10).We have to next step for what are Reports ?in tenth milestone.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.

There are 4 types of report formats in Salesforce:

1. Tabular Reports
2. Summary Reports
3. Matrix Report
4. Joined Reports

There are 2 types of report types: 1.Standard Report Types

2. Custom Report Types

11). If they are finally milestone is create for the dashboard. 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.

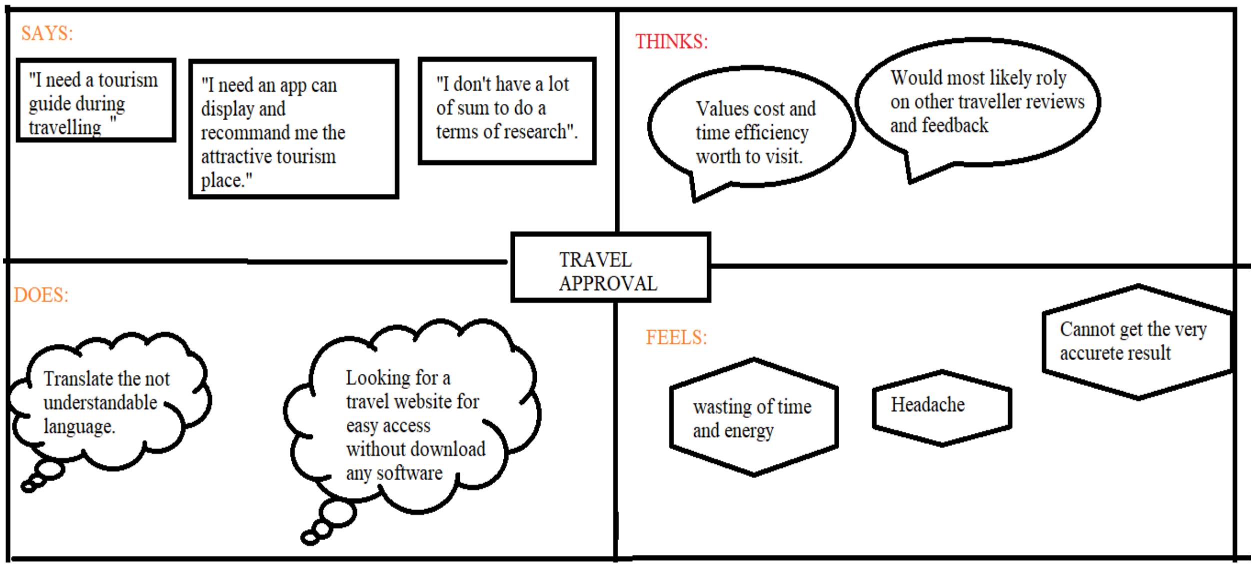
1.2 PURPOSE:

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.This Project helps in sending your travel approval requests to your manager in place of emails.

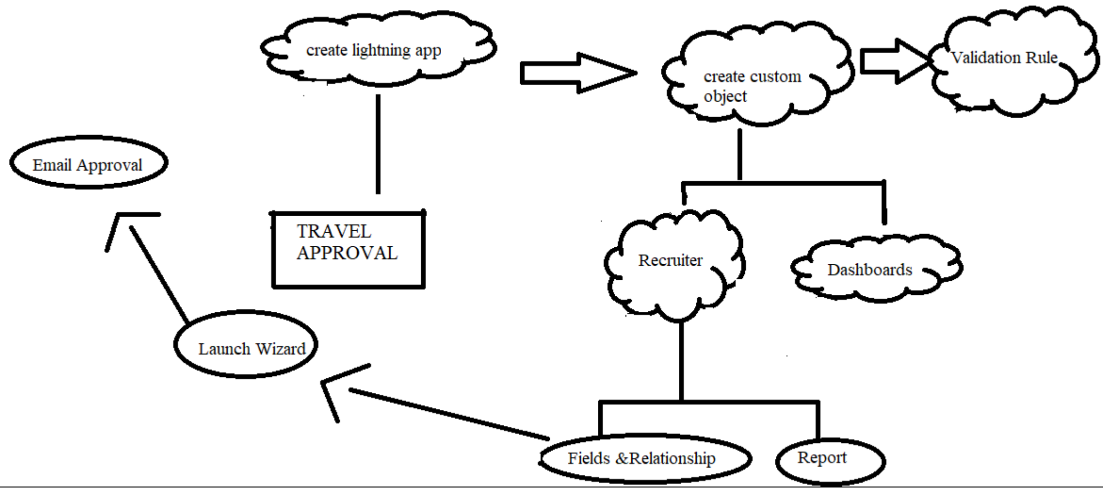
2.Problem Definition &Design Thinking

2.1Empathy Map:

Object name	Fields in the object



2.2 Ideation & Brainstorming map:



3 .RESULT:

3.1 DATA MODEL

Object 1 Travel approval	Field label / Data type; Travel Approval / Look up; Owner / Look up(user,group)
Object 2 Recruiter	Field lable / Data type; Recruiter / Look up; Owner / Text(80)
Object 3 Report	Field lable / Data type; Travel approval / Text; Report / Text
Object 4 Dashboards	Field lable / Data type; Travel approval / Text; Dash boards / Text

Milestone 1- Create Salesforce Org:

Activity-1:

Creating Developer Account

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/

2. Click on sign up.

3. On the sign-up form, enter the following details:

1. First name & Last name

2. Email

3. Role: Developer

4. Company: College Name

5. County: India

an actual email id, you can give anything in the format:

username@6. Postal Code: pin code

7. Username: should be a combination of your name and company

This need not be organization.com

Milestone-2:

Activity-1

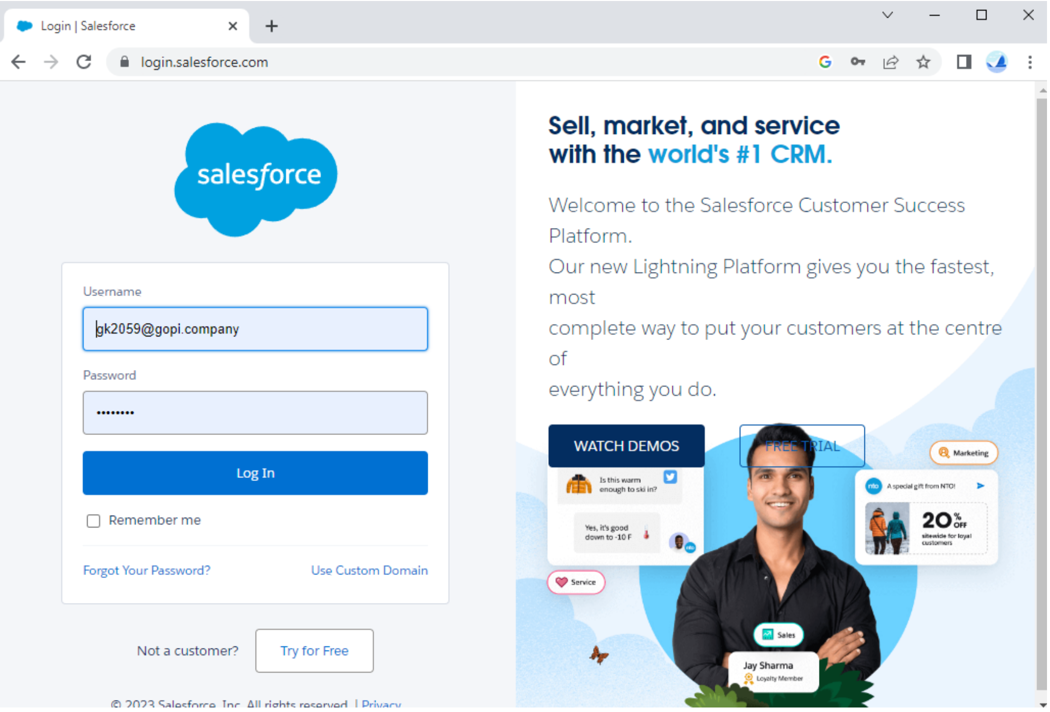
Account Activation:

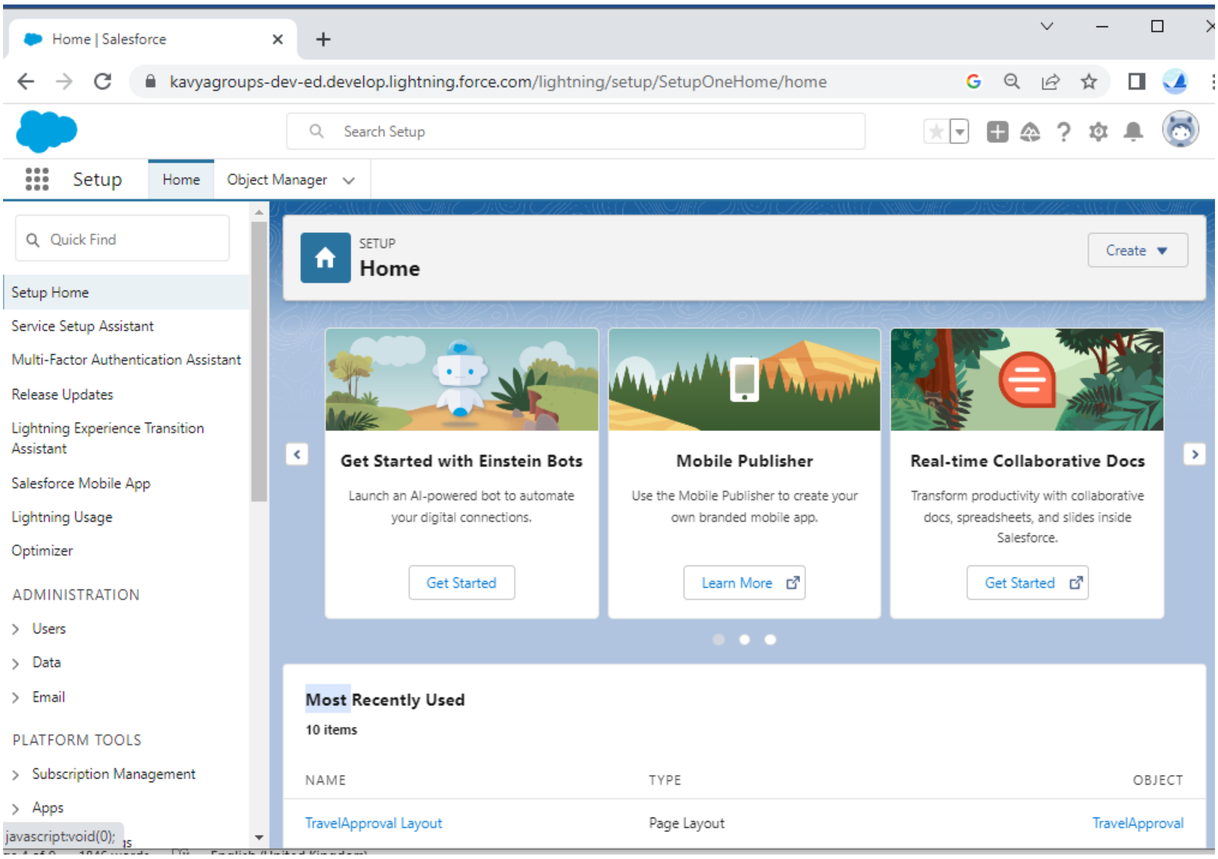
Login To Your Salesforce Account

1.Go to salesforce.com and click on login.

2.Enter the username and password that you just created.

3.After login this is the home page which you will see.





Milestone 3

What is an object?

Activity-1:

1.After you Login to your org, click create on the right side of the page and select custom object.

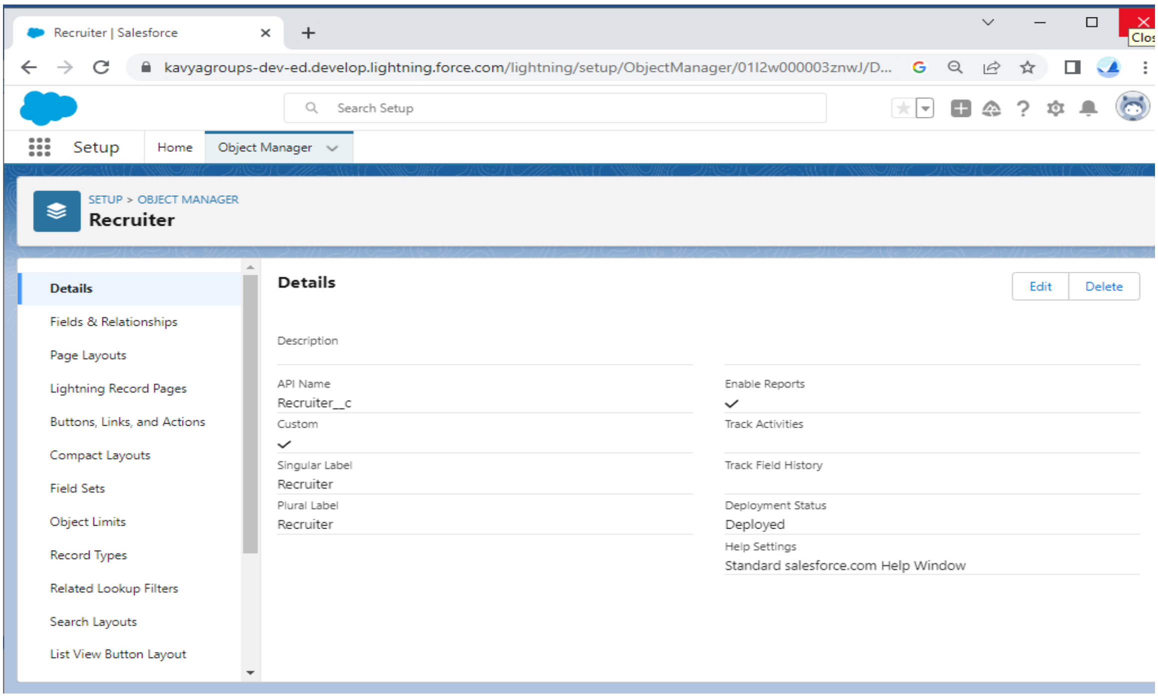
2. To create an object:

From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.

3.Enter lable name as“ Recruiter”.

4.Fill in the plural lable name as “Recruiters”.

5.Click on allow reports , allowsearch and save.



Milestone 4-What is a Tab?

create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.Under Custom Object Tabs, click New

1. For Object, select Event .
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save

Milestone-4:Create Fields &Relationships:

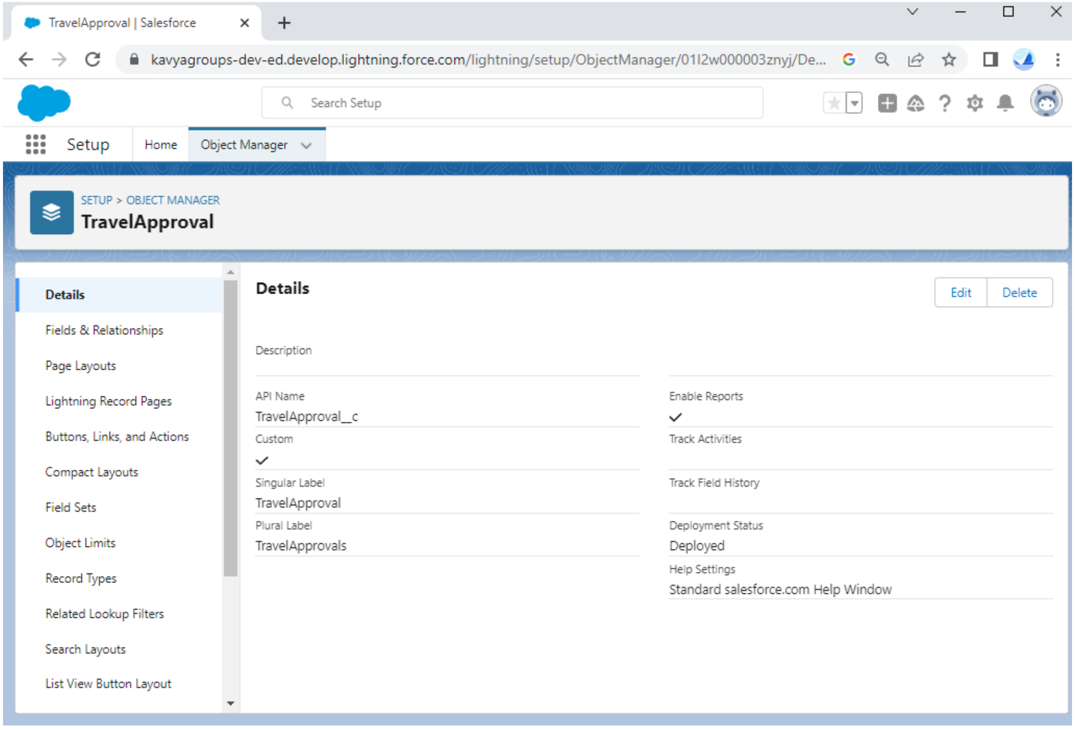
Activity-1:
1. Click Fields & Relationships, and click New.
2. For data type, select Currency.
3. Enter these details.
    a. For Field Label name: travel approval, enter Amount
    b. For Length, enter 16
    c. For Decimal places, enter 2
    d. Select Required

4.click next,next,thensave&new.

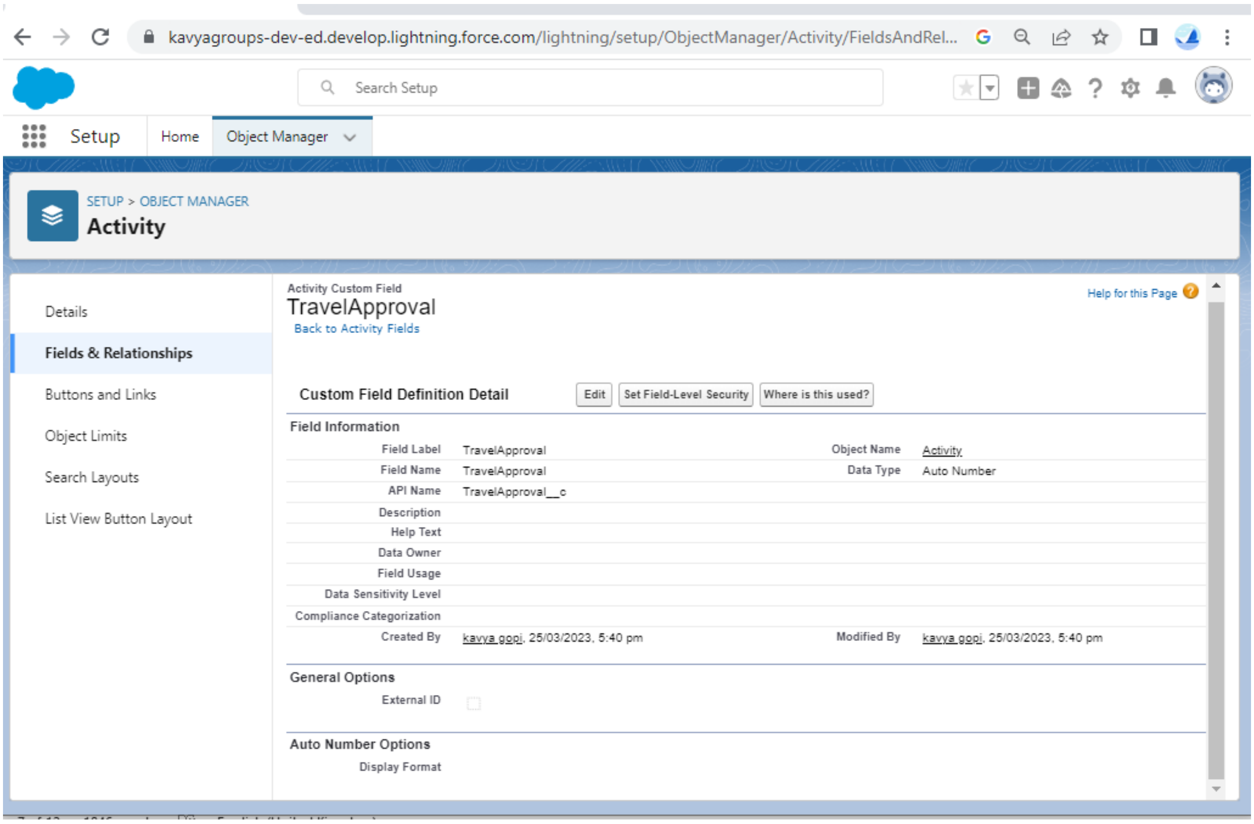
Activity-2:

Create the Travel Approval field.
• Select Master-Detail Relationship data type, click Next.
• Select Travel Approval from the Related To menu.
• Click Next four times, then click Save.

Milestone-4:



Milestone-4:



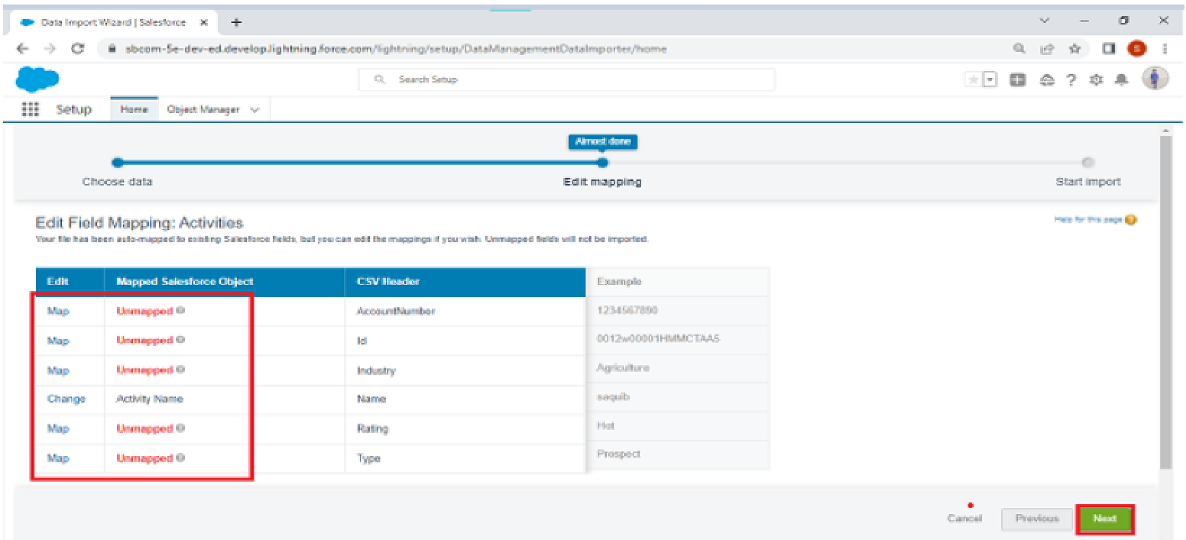
Milestone-5:Import Departments

Activity-1:
From Setup, click the Home tab.
1. In the Quick Find box, enter Data Import and select Data Import Wizard.
2. Click Launch Wizard!

3.next,select add new records.

4.drag &drop the departments .CSV file you downloaded using zip file or click the CSV icon and browse to select your file.select next.

5. Since the field names in the CSV file (CSV Header) are the same as the field names in your
object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.
6. The next screen gives you a summary of your data import. Click Start Import.
7. Click OK on the popup.
8. This takes you to the bulk import summary window that shows that the process has completed
and 16 records have been successfully imported or processed. You'll also get an email notification confirming the import.



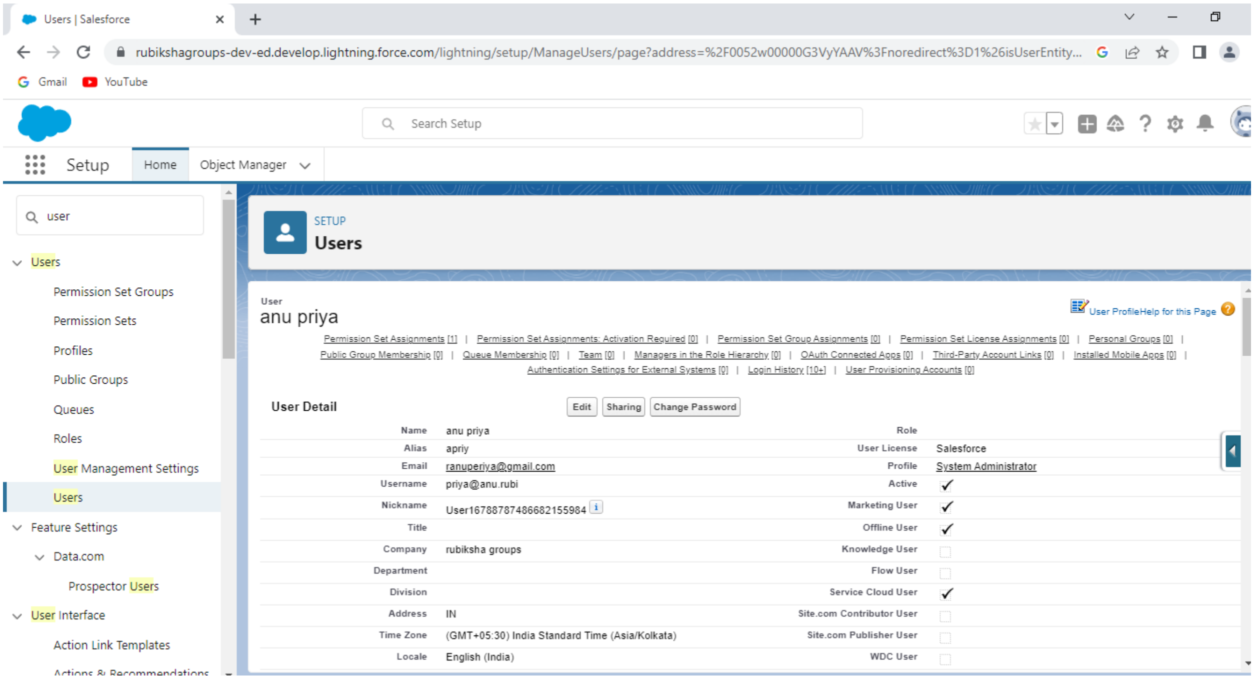
Milestone6-Customize User Interface:

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

Activity-1:
Create User and Setup Approvals
1.Enter users in the quickfind box and select users.
2.Click new user .

3.Now give the name as you wish but the email must be real email address.
4.For username field follow the insstructions
• Firstname.<yourlastname>@<yourcompany>.com
• ...or create a username of your choice that should be unique
5.Give the role as CEO, Profile as System Administrator and license as Salesforce.
6.From Setup, enter Users in the Quick Find box and select Users.

7.Select your user account in the list provided. (Click on your name in the All Users list.)
8.Click Edit.
9.Scroll down to Approver Settings. Set your manager as the user you have created recently.
10.Click Save

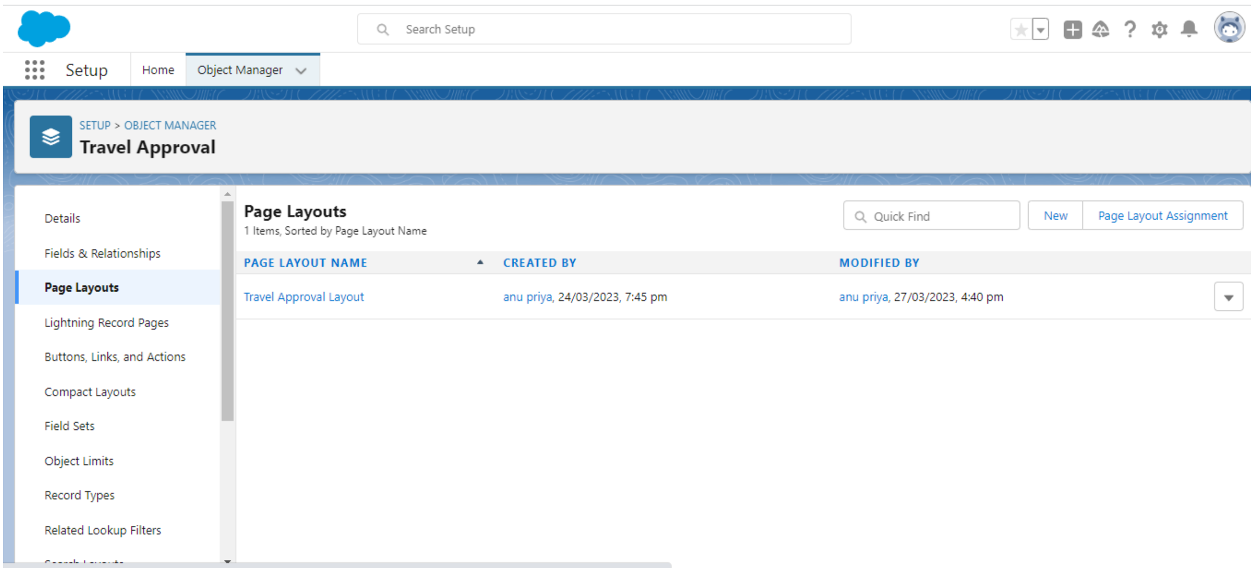


Milestone-7:Use Customization

Activity -1:
Customize Travel Approval Object Page layout
1.From the Object Manager, search for the travel approval object and click on page layouts and
click edit.
2.Drag Section from the top pane to the lower pane directly below the Information

section.when dragging over the page you get a visual indicter of where you can drop the new section.

3.Name the section Trip Info, leave the rest of the settings at their default values, then click OK.
4. Drag the Purpose of Trip field from the Information section to the Trip Info section..
5.Drag Trip Start Date and Trip End Date from the top pane into the left-hand column of the Trip
Info section.
6.Drag Out-of-State and Destination State from the top pane into the right-hand column of the
Trip Info section.
7.Drag the Department field from the left-hand column of the Trip Info section to the right-hand
column.
8.Click Save.



Milestone -8:Add Business Logic to Travel App

Activity-1:
Create Validation Rule:

1.Search for the travel approval object from the object manager and open the object.
2.Click on validation rules and give your rule a name and make sure that the rule is set to active.
3.In the error condition formula enter Trip_End_Date__c<Trip_Start_Date__c.
4.For error location select field and pick trip end date as the location for error.

Milestone-10:What are Reports?

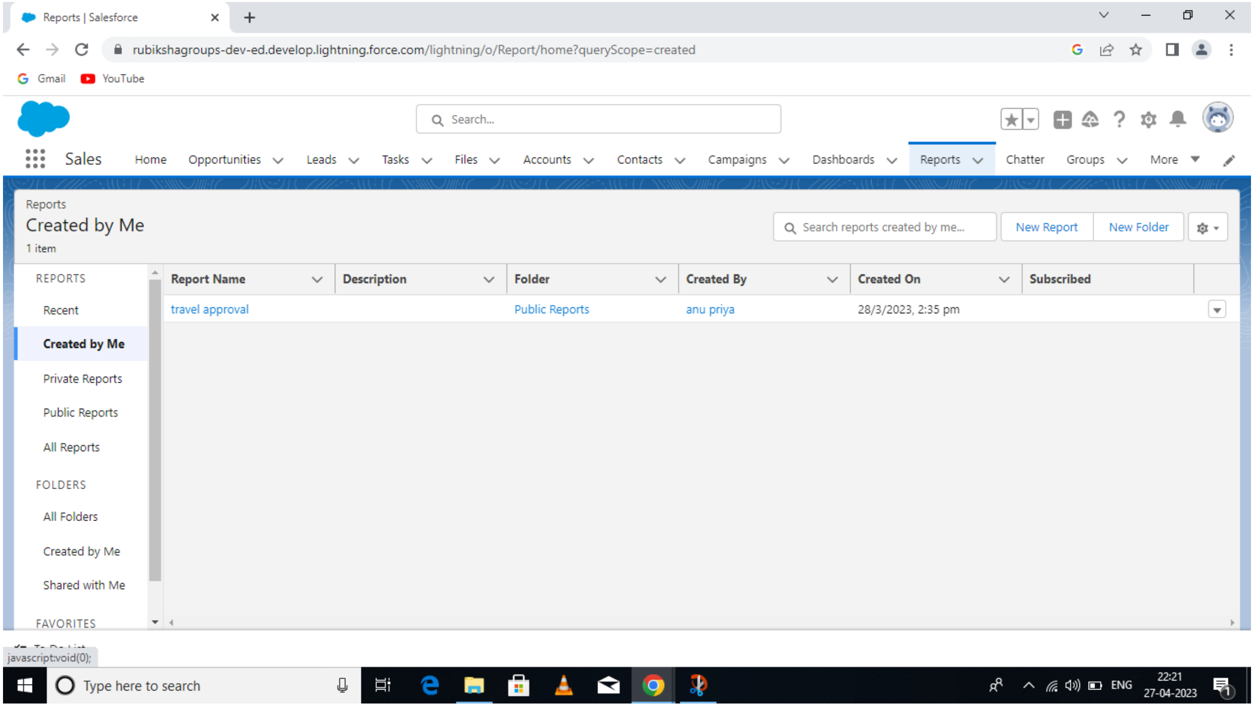
Activity-1:

Add report.
To create a report:
Go to the app to click on the reports tab

Click new report

Select report type from catogry or from report type panel or from search panel to click on start report.

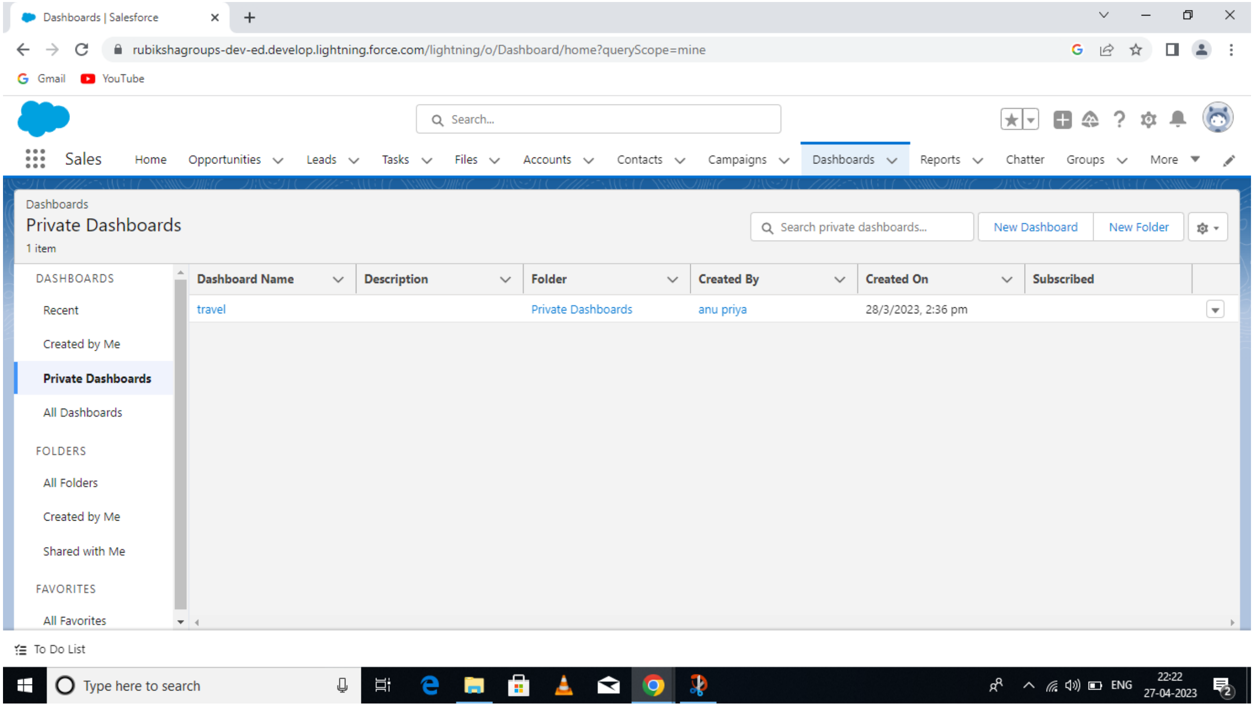
Customize your report then save or run it.



Milestone-11:Dash Board

Activity:

Create Travel Approvals Dashboard
1.Click on Dashboards tab from the travel approval application,click on new dashboard
2.Give your dashboard a name and click on +component , select the report **which** you created .
3.For the data visualization select any of the chart, table etc as your wish.



4.TRAILHEAD PROFILE PUBLIC URL

Team lead –trailblazer.me/id/asujitha7

Team Member 1-trailblazer.me/id/anupr72

Team Member 2-trailblazer.me/id/pandp5

Team Member 3-trailblazer.me/id/kgopi61

5.ADVANTAGES:

1.APPROVELS ON TIME

The entire process of planning and managing a trip is a long and stressful process. This means your employees need to spend hours looking for travel options, By automating the approval workflow, you can simplify the process. Your employees no longer have to run behind a manager or finance team for approvers

2.CUSTOMIZE APPROVEL WORKFLOWS

The approval process can differ from company to company. Using expense management software, you can customize the workflow based on your organization. You can set up multiple workflows within your organization, that will allow you to better manage your expense approval requests.

3.INCREASE COMPLIANCE AND REDUCE COSTS

A well-defined expense approval workflow will help in reducing non-policy-compliant expenses in your firm. You can now prevent expense frauds such as duplicate bills, overstated expenses, non-policy complaint items, manipulated invoices, etc.

4.**FASTER PROCESS**

Most expense management software comes with mobile capabilities. This means approvers get notified of the travel requests sent by employees, which they can approve or reject fast. This reduces approval time and enhances the expense management process in your firm.

Disadvantages:

As convoluted or buggy as travel sites can be, many travelers still prefer them to doing things the analog way. Another 36 percent of respondents said they like travel sites because they don't have to talk to a person on the phone, and 32 percent said that overall it's a better customer experience. While all but 14 percent of respondents chose one pain point or another with travel apps and websites, only 1 percent said they don't use online booking at all.

APPLICATION:

Travel Approvel request app will help users quickly send a Travel Request through mobile using power apps .level 1 managers can review the request and take actions from the same power apps through mobile.it makes travel more affortable.you can pick your perfect destination and travel dates.you can plan for alonger trip.

CONCLUTION:

Instant availability of information.A travel app gets users a direct answers to everything they need to know about planning a vacation the way to reach there flight /train ticket details ,hotel booking,places of interest in the destintion.

If you are looking for one of the best travel apps in India that will be not only the best travel apps in India that will not only help you conveniently book your travel ride but also make you save hung on your booking ,then the ease my trip application might just turn out to be the right choice for tham.You can get to know your destination and decide what to do during your free time .you can score cheaper flights.You can get access to special events