

## FOR CORPORATES

- **INTRODUCTION**

- **Overview**

I am writing to notify you of my upcoming leave of absence between {start date} and {end date}. As I have to travel to attend the wedding of my close relative, I will be able to resume work from the afternoon of {enter date}. I have ensured that all my responsibilities are passed on to {enter name}, who reports to me. Here is a sample of a letter requesting permission to travel. Dear Sir/Madam, I am writing to request permission to be absent from work for two weeks from (date to date) to attend an event. I will be away for 14 days and promise to return to work on (specify the date). This document is of tremendous importance because it affects the time and cost of the company, mainly. time and cost of the company, mainly. Therefore, it is necessary to have a suitable policy is necessary if we want to have a better control of the company's travel expenses. travel-related expenses in the company. Related words. A mobile travel app is a software application that has been developed specifically for use on smaller devices, such as smartphones and tablets, and can be used by business travellers to book and manage their travel whilst on the move.

### **Purpose**

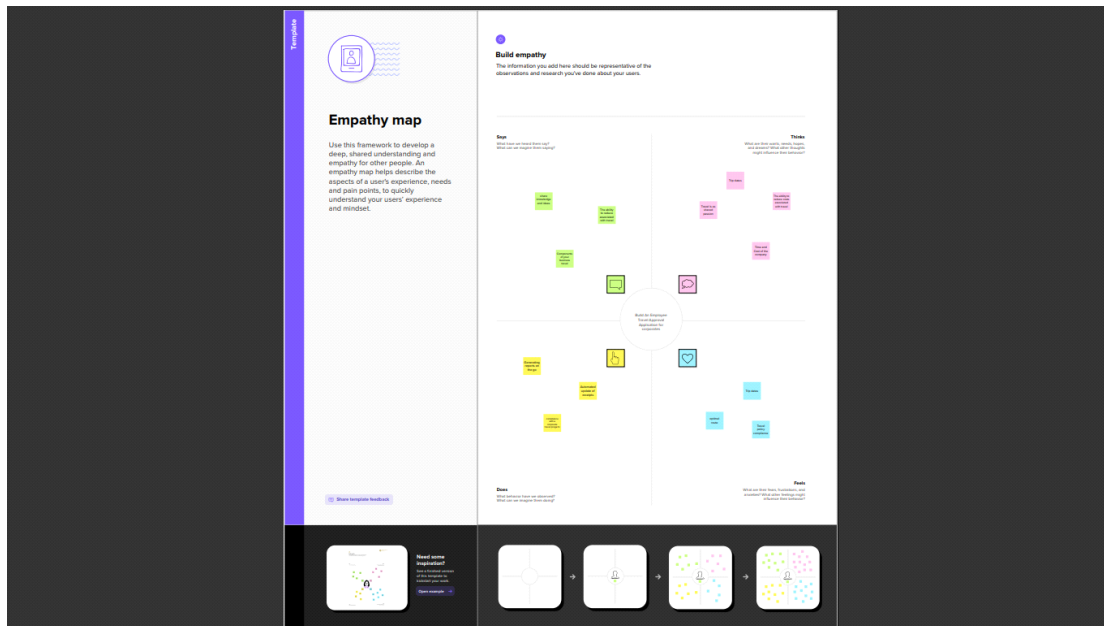
Learn how to write a business trip proposal that will get approved quickly so you can organize and confirm company-related travel.

There are many reasons to take business trips. You can attend conferences, visit other company locations, or just go on a team-building retreat. Of course, you won't be going anywhere without your company's approval. That's where a business trip proposal comes in.

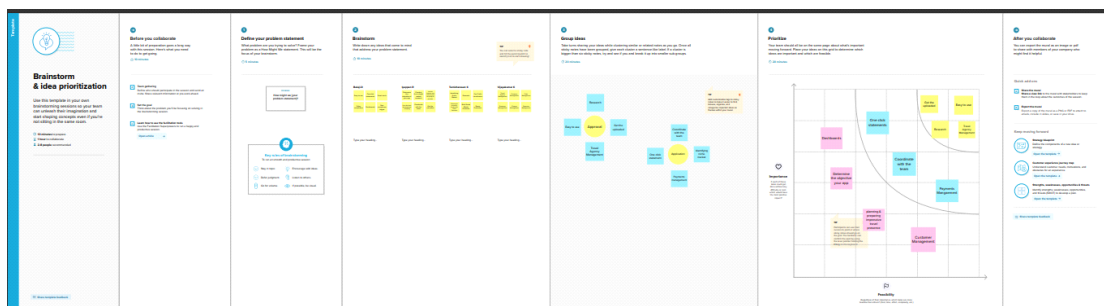
If a business is going to pay for an employee's trip, there needs to be a good reason. That's why it's important to include all the trip details (plus, a little persuasion), so the company can determine if it's worth the investment. Be sure to include at least the following information in your business trip proposal. Reasons for attending, Destination and dates, Names of company attendees, Detailed itinerary Expenses, including hotel, airfare, rental cars, meals, and more. If you make a strong enough case, management will sign off on the business trip proposal so that you can finalize travel plans for yourself and your colleagues.

## **Problem Definition & Design Thinking**

### **Empathy Map**



## Ideation & Brainstorming Map



## RESULT

Build & regulate your travel request approval workflow

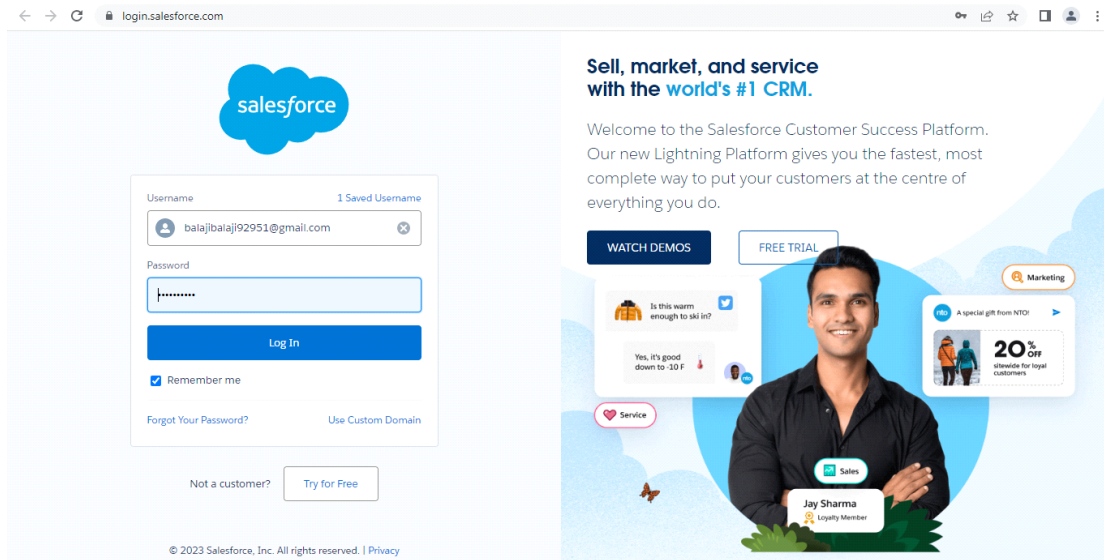
Travel management systems to automate business trip approval process

One-stop platform for managing travels & expense claims

Supports compliance & reduces the booking process to minutes

Reduced Booking times & improved employee productivity

Achieve full control on travel expenditures

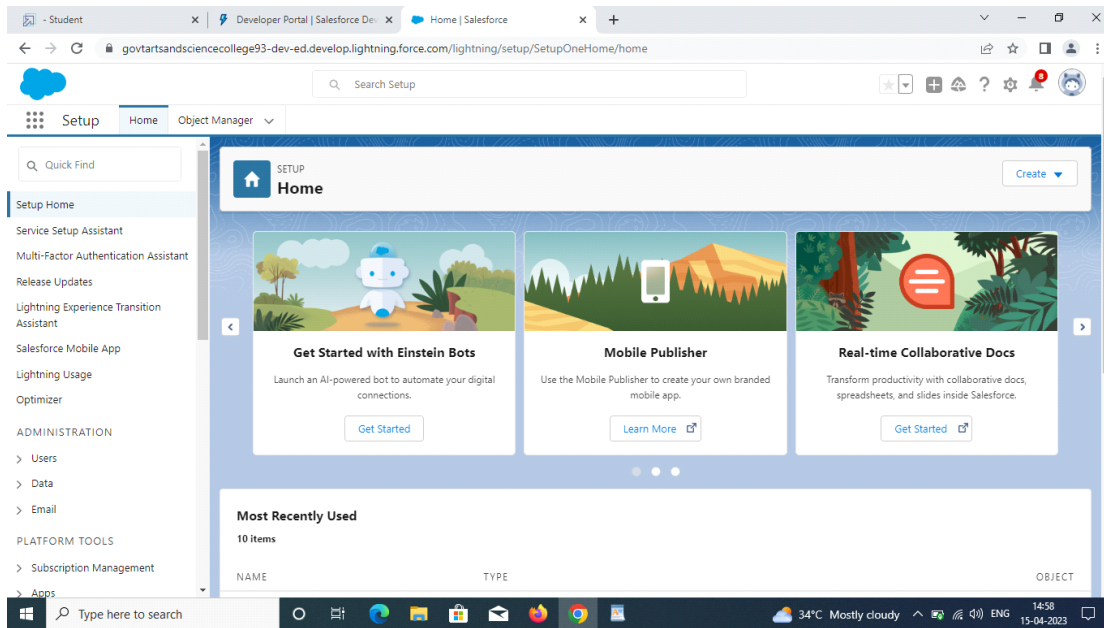


## Data Madel

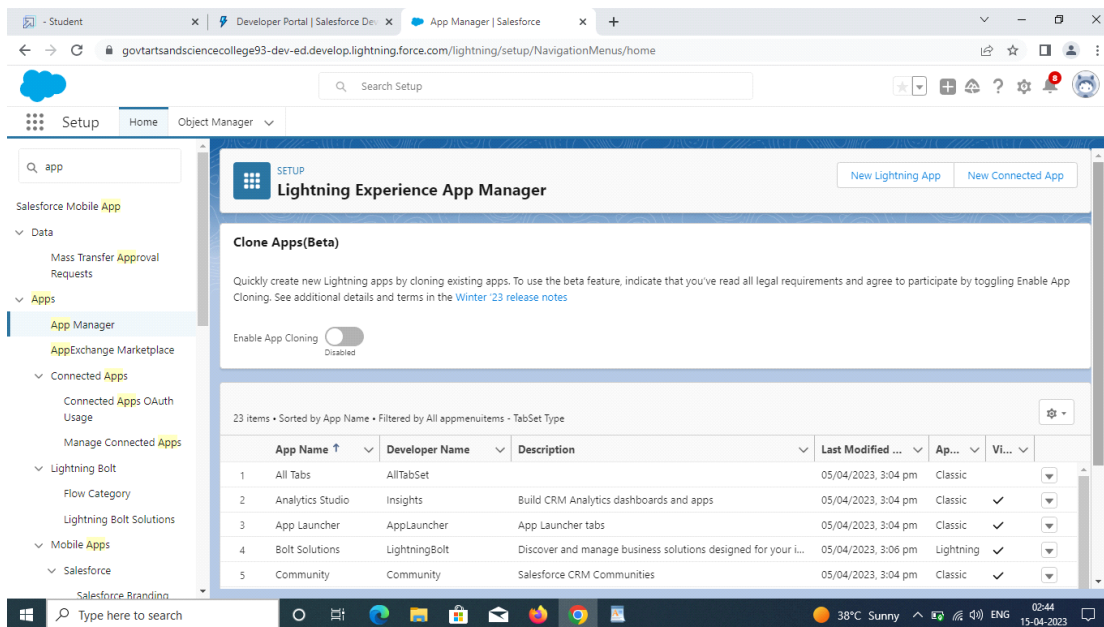
Object name	Fields in the Object	
Department	Field lable	Data type
	Amount	Currency
Travel approvel	Field lable	Data type
	Travel approvel	Master-detail relationship
Expense item	Field lable	Data type
	Expense item	Roll_up summary

## Activity & Screenshot

### Milestone 1



## Milestone 2 Creating The Application



## Milestone 3 Object

Student | Developer Portal | Salesforce | student | Salesforce

govtartsandsciencecollege93-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kald/edit?address=%2F0112w000003kald%2Fe%3FretU...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

student

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

Edit Custom Object

student

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label student Example: Account

Plural Label students Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name student Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Type here to search

38°C Sunny 02:34 15-04-2023

Student | Developer Portal | Salesforce | Department | Salesforce

govtartsandsciencecollege93-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kYWE/edit?address=%2F0112w000003kYWE%2Fe%3FretU...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Department

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
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Edit Custom Object

Department

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Department Example: Account

Plural Label Departments Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Department Example: Account

Description

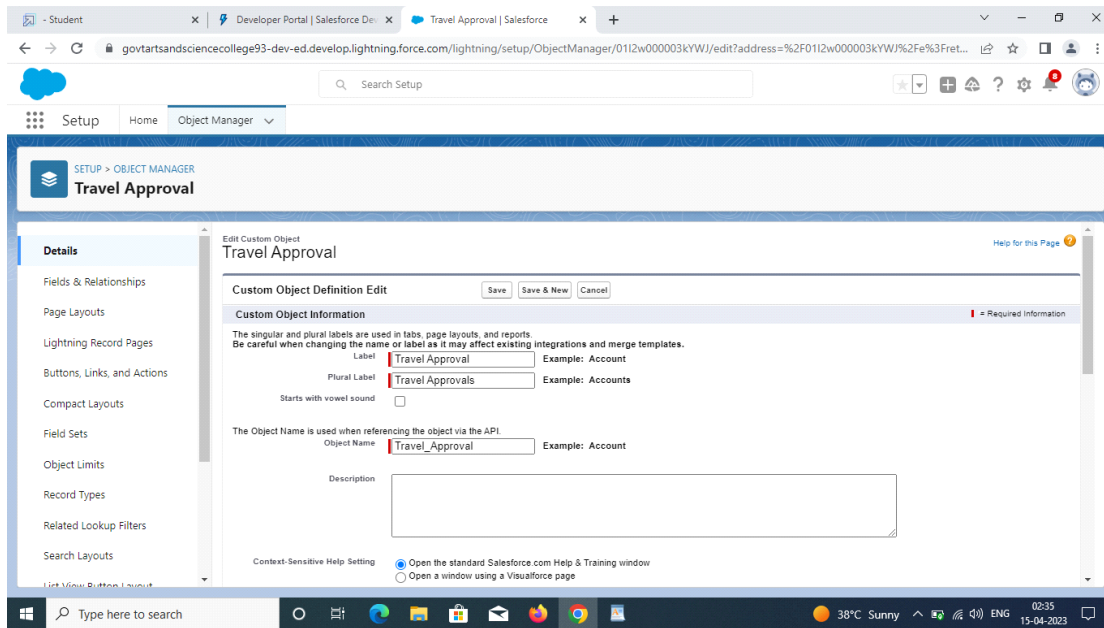
Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

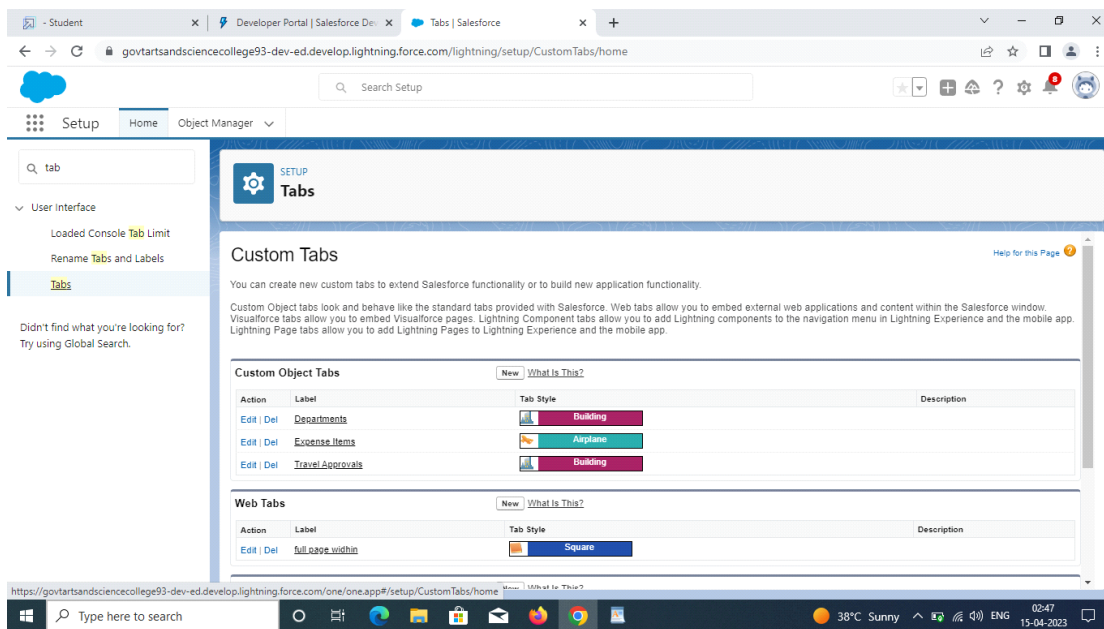
☐ Open a window using a Visualforce page

Type here to search

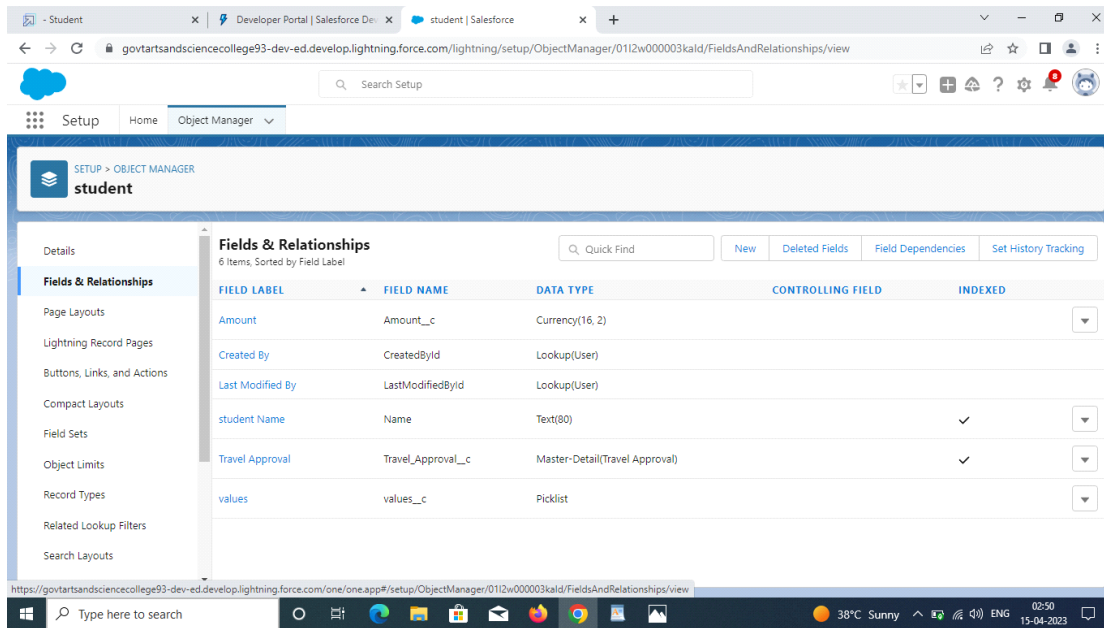
38°C Sunny 02:37 15-04-2023



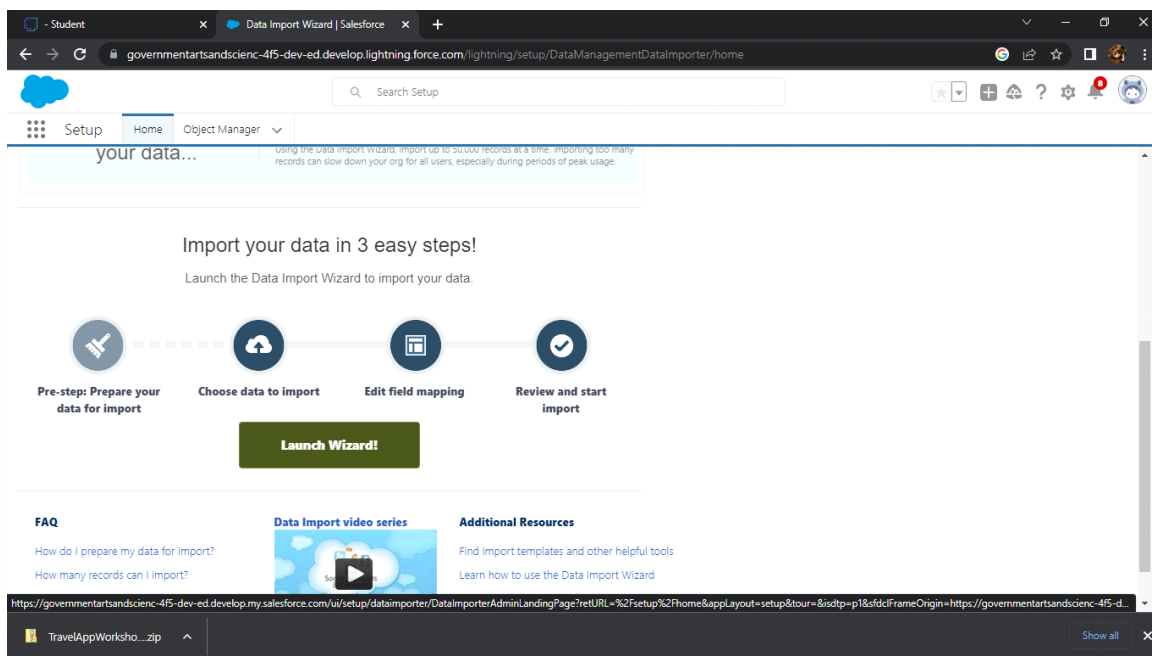
## Milestone 4 Tab



## Milestone 4 Create Field & Relationships



## Milestone 5 Import Department



## Milestone 6 Customize User Interface

Student Developer Portal | Salesforce Dev Users | Salesforce

govtartsandsciencecollege93-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w0000H8o4TAAR%3Fnoirect%3D1%26isU...

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

User BALAJI D

Permission Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Connected Apps (0) | Third-Party Account Links (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0) | User Provisioning Accounts (0)

User Detail

Edit Sharing Reset Password Freeze

Name	BALAJI D	Role	CEO
Alias	bd	User License	Salesforce
Email	balajibalaji82951@gmail.com	Profile	System Administrator
Username	balusales0420@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16811085693566163615	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>

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Student Developer Portal | Salesforce Dev Users | Salesforce

govtartsandsciencecollege93-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w0000H8o4TAAR%3Fnoirect%3D1%26isU...

Setup Home Object Manager

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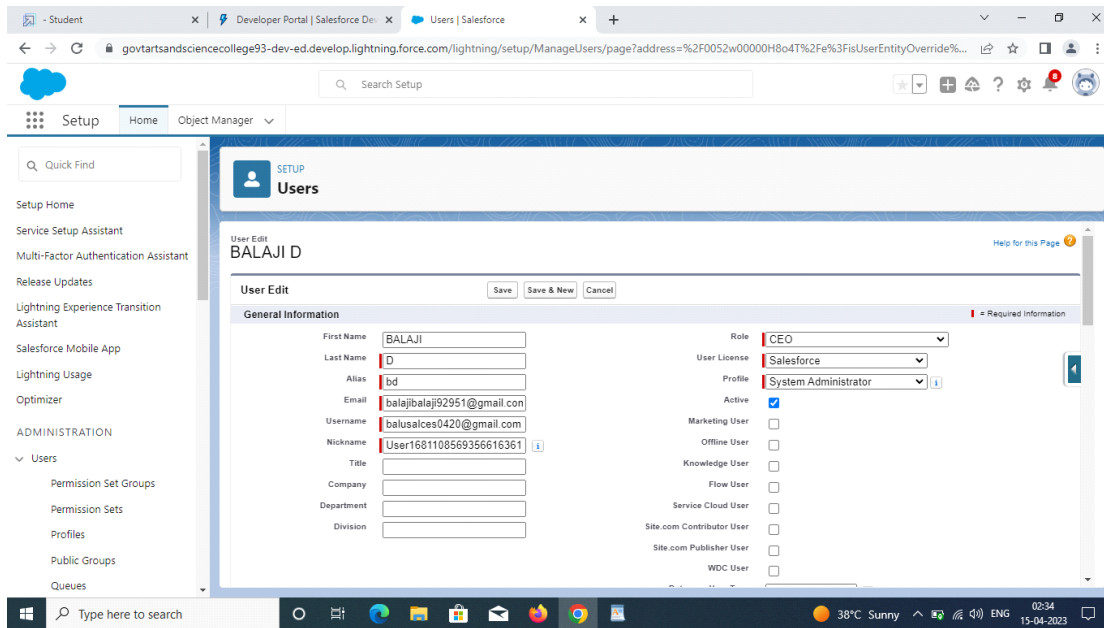
User Detail

Edit Sharing Reset Password Freeze

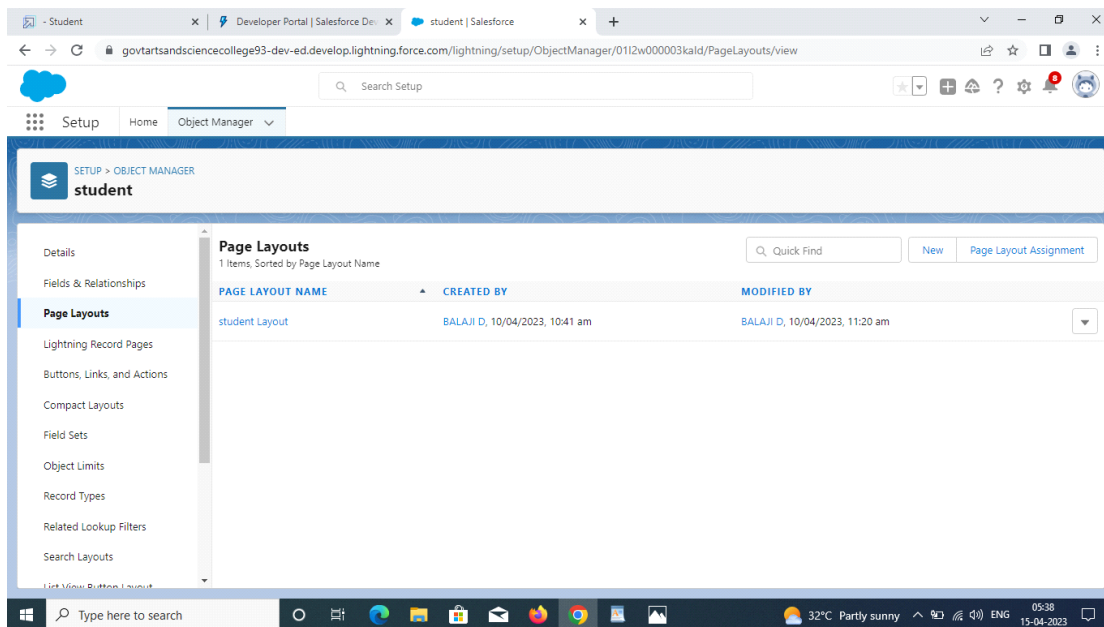
Name	BALAJI D	Role	CEO
Alias	bd	User License	Salesforce
Email	balajibalaji82951@gmail.com	Profile	System Administrator
Username	balusales0420@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16811085693566163615	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>

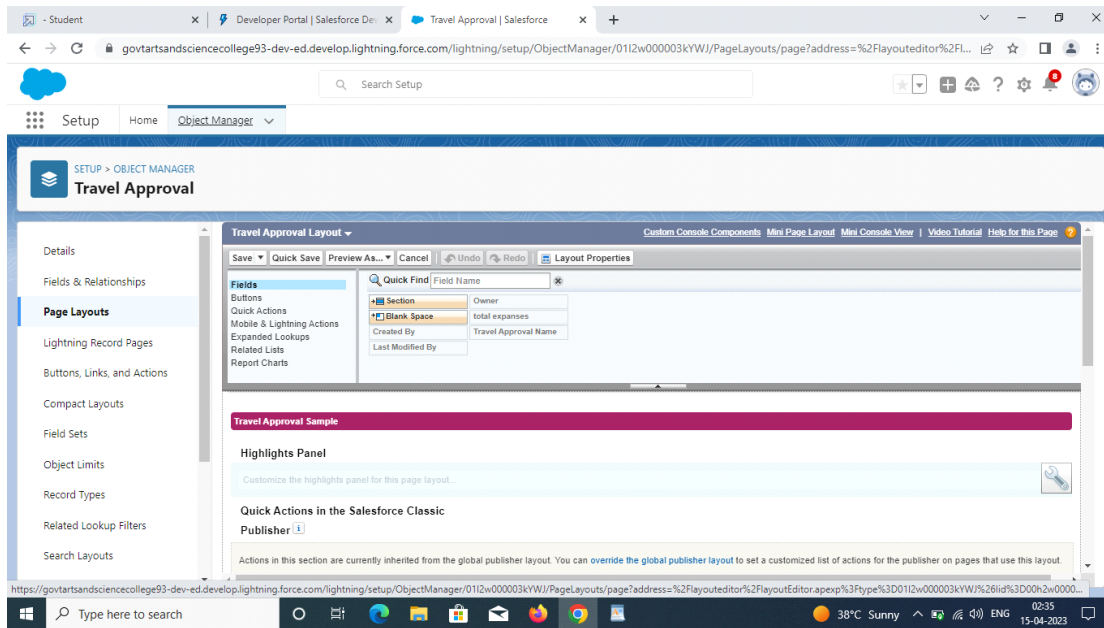
38°C Sunny 02:34 15-04-2023



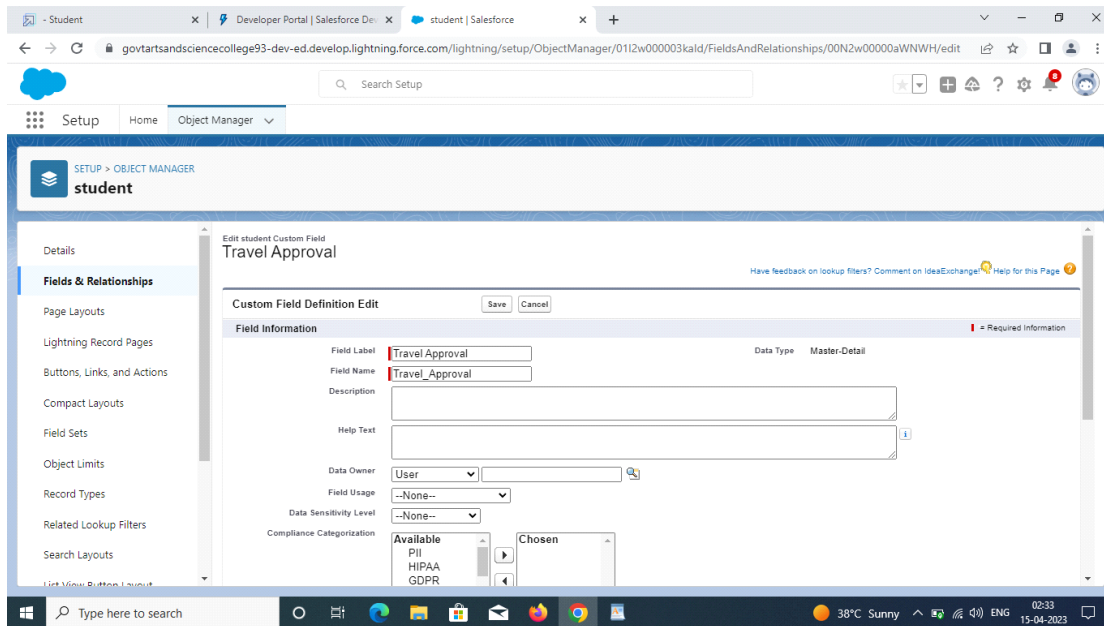


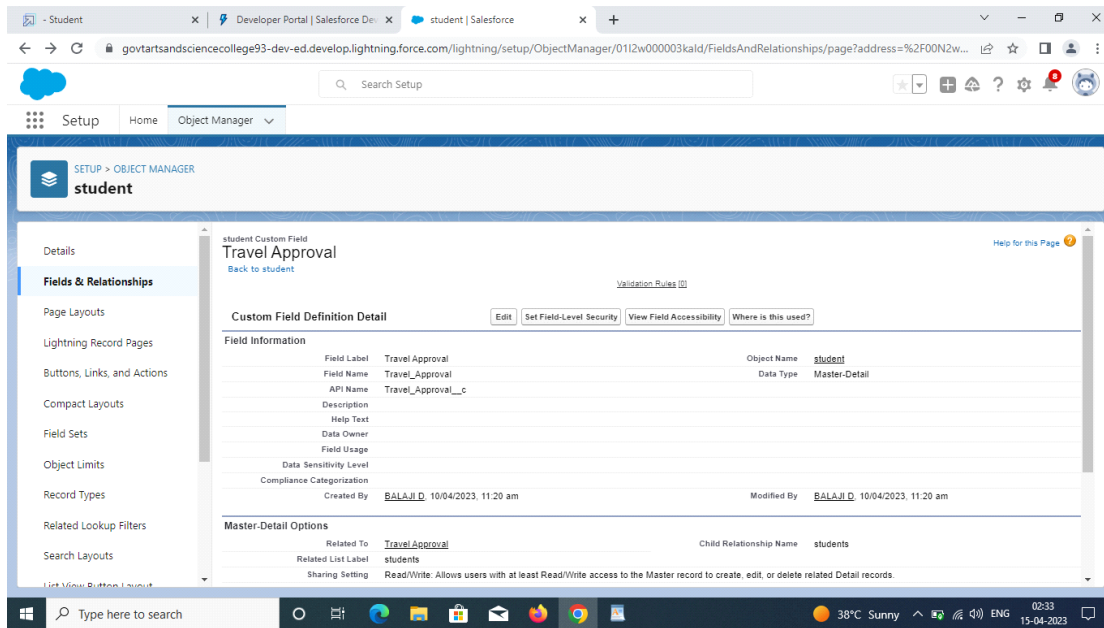
## Milestone 7 Use customization



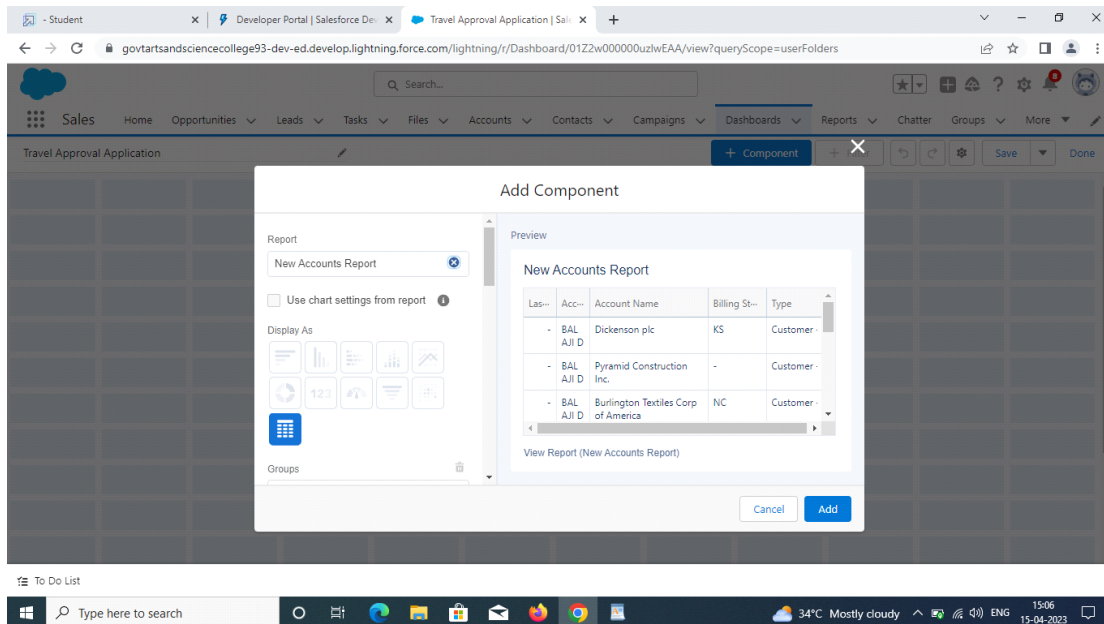


## Milestone 8 Add Business Logic to Travel App





## Milestone 10 Report



Student Developer Portal | Salesforce Developer | Travel Approval Application | Salesforce

govtartsandsciencecollege93-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w000000uzlwEAA/view?queryScope=userFolders

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Travel Approval Application + Component + Filter Save Done

### Select Report

Recent

- Created by Me
- Private Reports
- Public Reports
- All Reports

Folders

Select Report

Search Reports and Folders...

Reports and Folders

- New Accounts Report  
BALAJI D - 10-Apr-2023, 2:07 pm - Private Reports
- New Accounts Report  
BALAJI D - 10-Apr-2023, 2:08 pm - Private Reports
- Sample Flow Report: Screen Flows  
Automated Process - 05-Apr-2023, 3:04 pm - Public Reports

Cancel Select

To Do List

Type here to search

34°C Mostly cloudy 15:05 15-04-2023

Student Developer Portal | Salesforce Developer | Report Builder | Salesforce

govtartsandsciencecollege93-dev-ed.develop.lightning.force.com/lightning/r/Report/0002w000000EKGAnEAP/edit?queryScope=userFolders

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

REPORT New Accounts Report Accounts Add Chart Save & Run Save Close Run

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Outline Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

Last Activity x

Account Owner x

Account Name x

Billing State/Province x

Type x

Rating x

Last Modified Date x

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	BALAJI D	GenePoint	CA	Customer - Channel	Cold	05/04/2023
2	-	BALAJI D	United Oil & Gas, UK	UK	Customer - Direct	-	05/04/2023
3	-	BALAJI D	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	05/04/2023
4	-	BALAJI D	United Oil & Gas Corp.	NY	Customer - Direct	Hot	05/04/2023
5	-	BALAJI D	sForce	CA	-	-	05/04/2023
6	-	BALAJI D	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	05/04/2023
7	-	BALAJI D	Express Logistics and Transport	OR	Customer - Channel	Cold	05/04/2023
8	-	BALAJI D	University of Arizona	AZ	Customer - Direct	Warm	05/04/2023
9	-	BALAJI D	Edge Communications	TX	Customer - Direct	Hot	05/04/2023
10	-	BALAJI D	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	05/04/2023
11	-	BALAJI D	Pyramid Construction Inc.	-	Customer - Channel	-	05/04/2023
12	-	BALAJI D	Dickenson plc	KS	Customer - Channel	-	05/04/2023

To Do List

Type here to search

34°C Mostly cloudy 15:04 15-04-2023

Screenshot of a Salesforce dashboard titled "Travel Approval Application". The dashboard shows a "New Accounts Report" with a table of accounts and a large empty grid area.

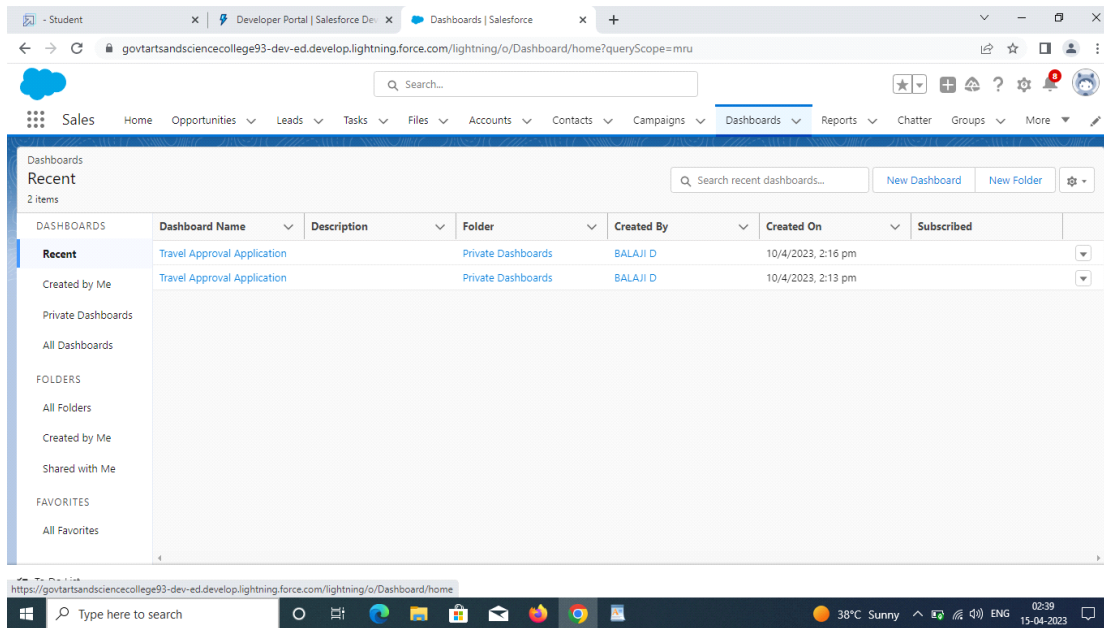
Last...	Acc...	Account Name	Billing Sta...	Type
- BALAJI D		Dickenson plc	KS	Customer -
- BALAJI D		Pyramid Construction Inc.	-	Customer -
- BALAJI D		Burlington Textiles Corp of America	NC	Customer -
- BALAJI D		Edge Communications	TX	Customer -
- BALAJI D		University of Arizona	AZ	Customer -

View Report (New Accounts Report)

Screenshot of the Salesforce Reports page. The page shows a list of recent reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Accounts Report	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Private Reports	BALAJI D	10/4/2023, 2:08 pm	
Sample Flow Report: Screen Flows		Public Reports	Automated Process	5/4/2023, 3:04 pm	
New Accounts Report		Private Reports	BALAJI D	10/4/2023, 2:07 pm	

## Milestone 11 Dashboards



## Trailhead Profile Public URL

**BALAJI D-** <https://trailblazer.me/id/balad29>

**IYAPPAN R 1** -<https://trailblazer.me/id/iyapr>

**TAMIZHARASAN K 2** -<https://trailblazer.me/id/tamizharasana>

**VIJAYAKUMAR K 3** -<https://trailblazer.me/id/vkumar3427>

## ADVANTAGES & DISADVANTAGE

Expense approval workflows give the finance team the ability to manage and control where the company funds are going. Be it a business trip that an employee is going on or an advance for one.

Advance fund requests on the Volopay platform can be made in the form of recurring funds. So for example, if John has to travel to client locations every month for sales purposes, he would have an idea of how much these visits cost on average. By estimating the amount, John can request a higher overall amount for the entire month's travel expenditure instead of requesting a smaller amount each time he has to visit a client.

This does two things:

- John doesn't have to wait for approvals every time. He can simply have a conversation with the financial controller once and receive the funds on a recurring basis every month to flexibly make

decisions on his own.

- The finance department also would not have to deal with constant requests for employees all the time and they'll still know that only a certain amount can be spent by them every month.

## **APPLICATIONS**

The Travel Support System (this is the name that you can see on the screen when executing the application) is a small sample application for NaturalONE. 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 you 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

## **Conclusion**

The corporate travel policy is an essential part of any business. It helps ensure that employees are safe while traveling and that they stay within budget limits. With the right policy in place, companies can make sure their travelers have a great experience and come back ready to work productively.

Traveling for work should be both exciting and safe. A well-crafted policy not only allows you to take advantage of rewards programs but also ensures your safety during unexpected emergencies. Taking the time to research and create a comprehensive policy will go a long way towards making sure your travels are smooth sailing.

So whether you're crossing the country or just crossing town, having a clear understanding of what is expected from corporate travel is key to creating lasting success on the road. Keep these tips in mind when writing up your company's own unique policy – with it, you'll be able to soar above any bumps along the journey.

- **Future scope**
- Apex developing tools.
- Using self-developed classes and triggers
- Using Flows and Screens
- Using visual force pages to develop proper HTML websites and custom HTML pages.
- Data analytics could even be implemented for smoother and prompt reports