

PROJECT REPORTS TEMPLATE

Introduction

1.1) overview

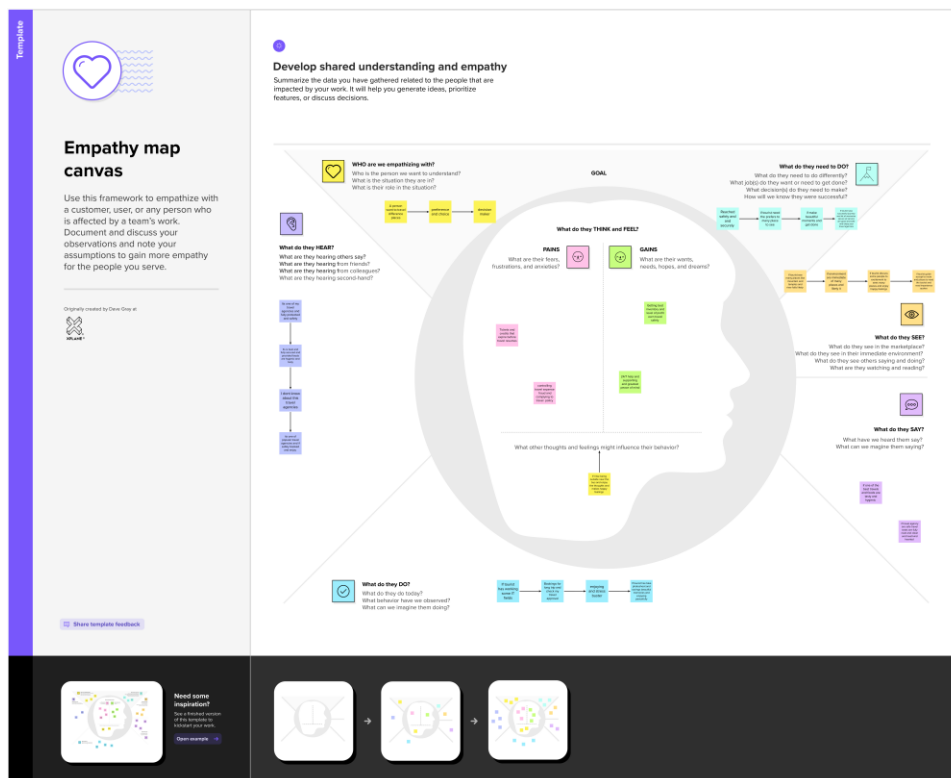
The creating salesforce Developer org is the first step of project and creating usernames and password to enter salesforce.com Travel Approval Application we need create six object mainly Travel Approval, Department, Expense item, Attendees, Speaker, Vendor. And create field and relationship for each objects. After create tabs by individuality. In Expense item we would create the field and relationship and selected the picklist data type and the master relationship for travel approval field. There was a CSV file attached in the data import wizard. Creating the page layout for the travel approval object. From Travel Approval object create rollup summary in field and relationship this is the validation rule of the Travel Approval and also create the formula field and create the report and finally add to the dashboard.

1.2) Purpose

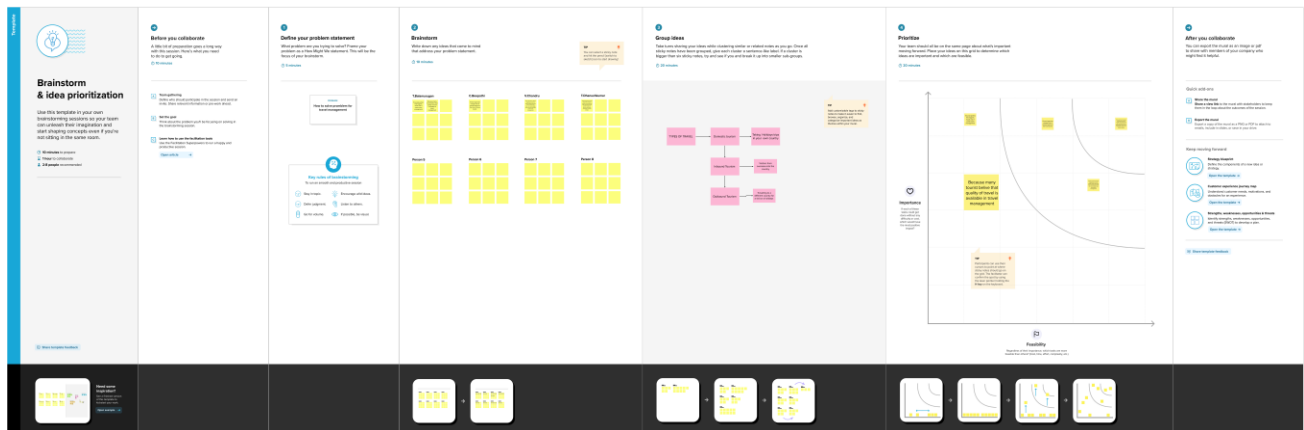
Build in Travel approval system using salesforce is a bussiness related project. The Travel Approval is used to make a trip easiest. It is very helpfull to all the travellers.

2) Problem Definition and Design Thinking

2.1) Empathy map



2.2 Ideation and Brainstroming Map



3) Result

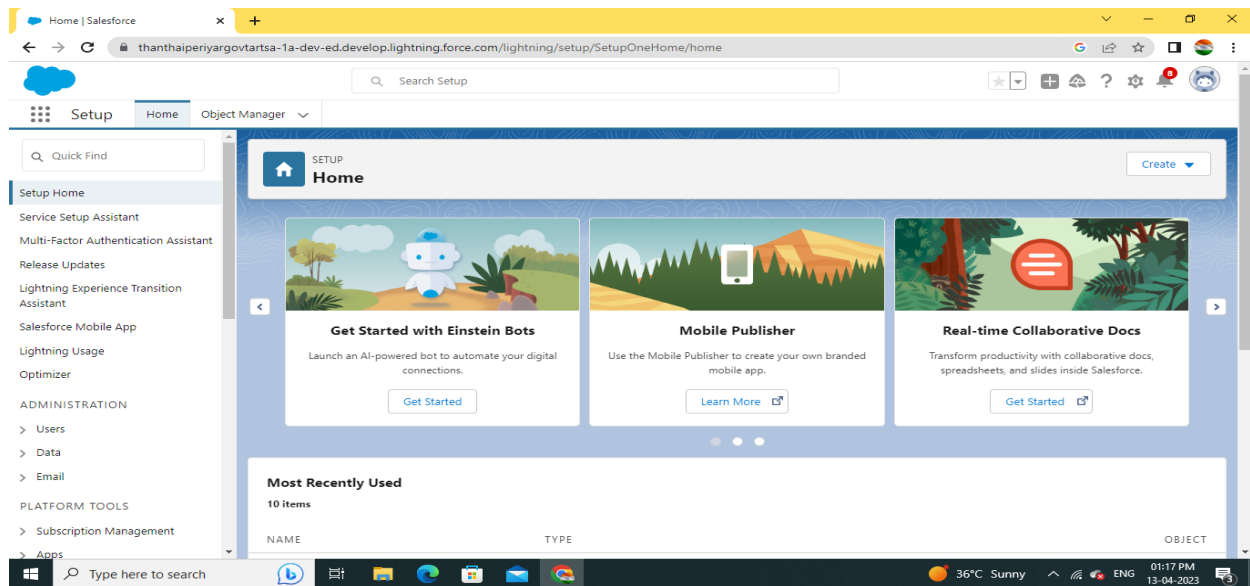
3.1) Data Model

Object Name	Filed in the object	
Event	Field label	Data Type
	city	Text
	Start Date	Date / Time
	End Date	Date / Time
Attendees	Field label	Data Type
	ID	Auto number
	Phone	Phone
	Email	Email
Speaker	Field label	Data Type
	Bio	Text Area
	Email	Email
Vendor	Field label	Data Type
	e-mail	E-mail
	Phone	Phone
	Service Provider	Service Provider
	Event Name	Look-up relationship
Event Object	Field label	Data Type
	Event Name	Master-detail Relationship
	Event Name	Look-up Relation

Student	Field label	Data Type
	Tickets	Picklist

3.2 Activity and Screenshot

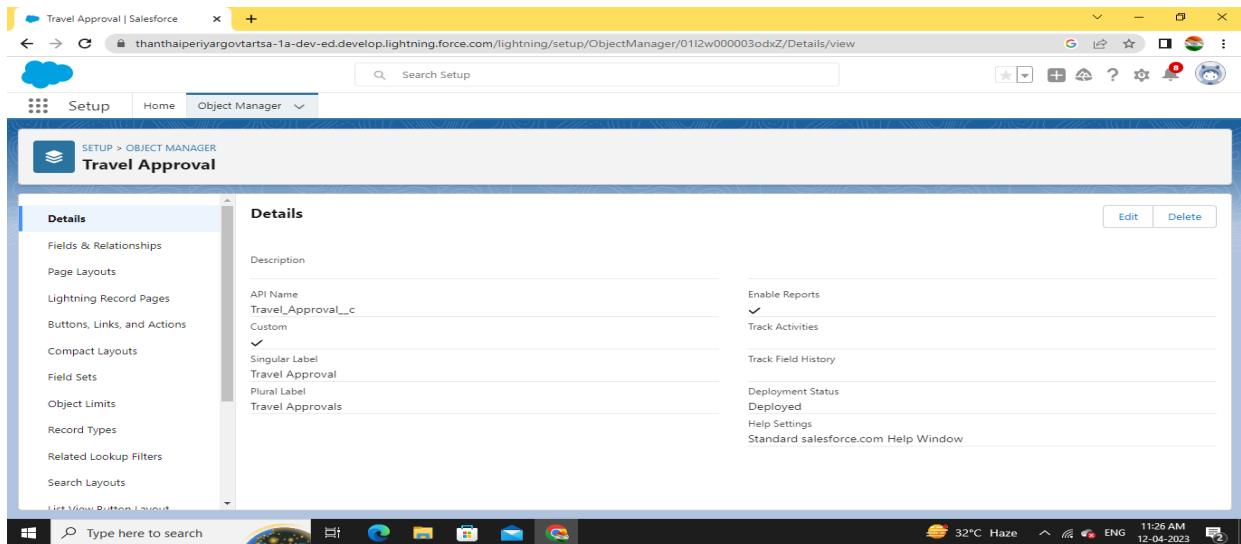
Activity - 1 creation of salesforce developer account,



Description:

- Creating a developer org in salesforce
- Login to your salesforce account
- Account Activation

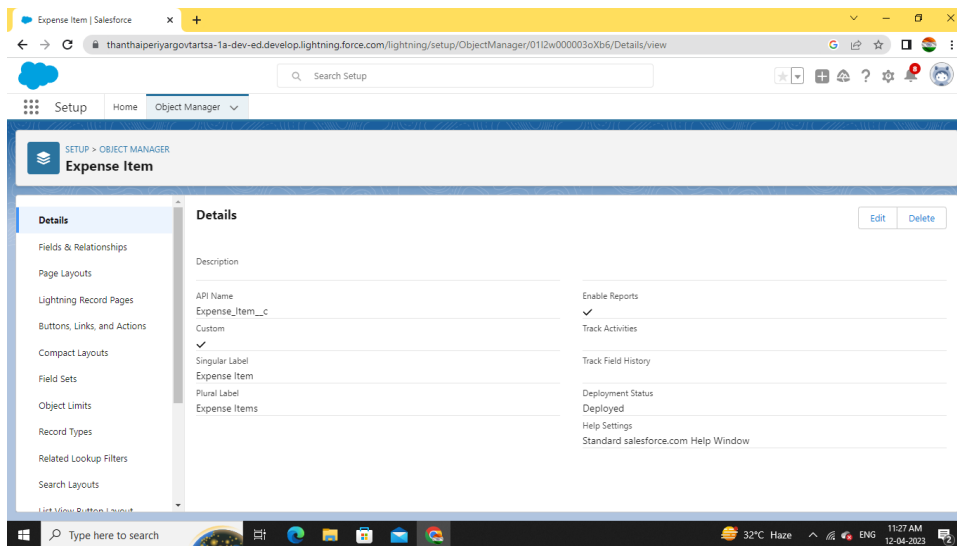
Activity - 2 Travel Approval



Descriptions:

- Creating the Application
- Create the Travel Applications
- And New lightning App

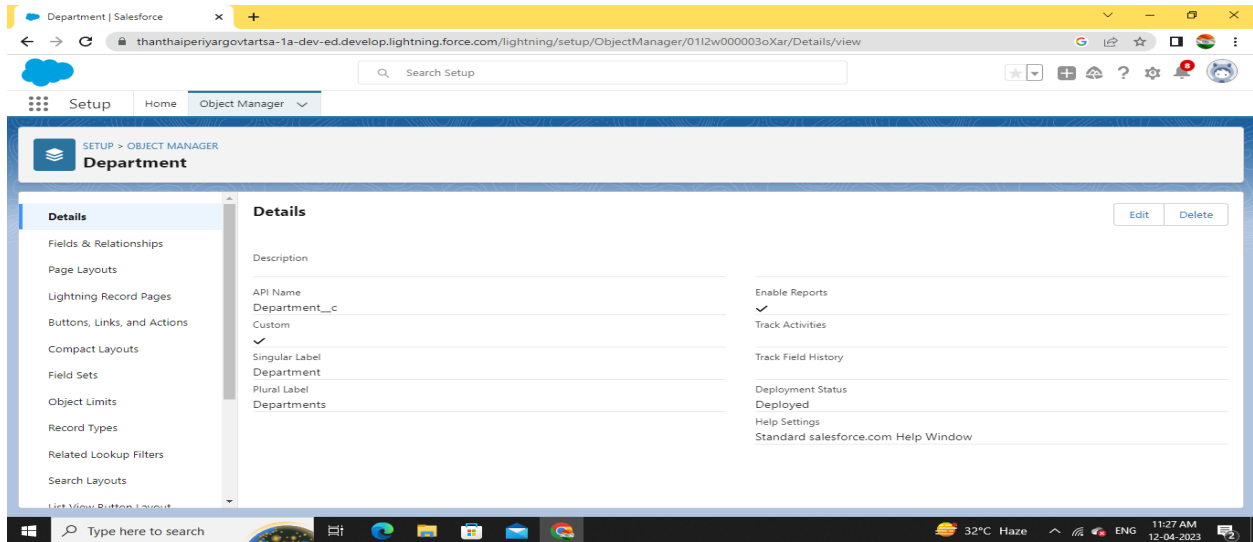
Activity - 3 Expense item



Description :

- Create Expense Item objects

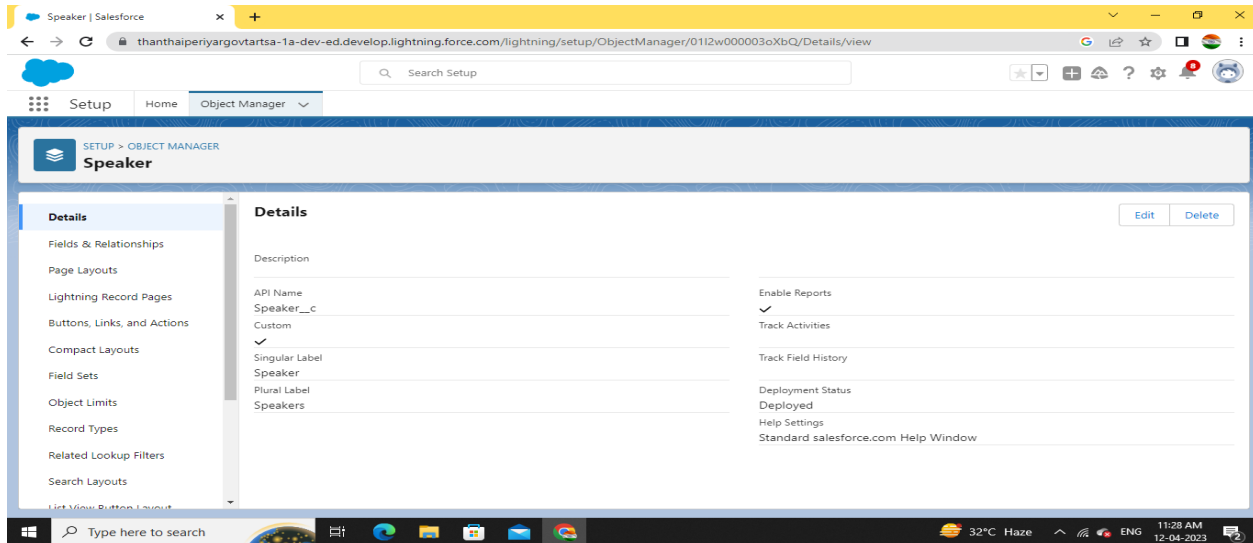
Activity - 4 Departments



Description:

- Create Department Objects

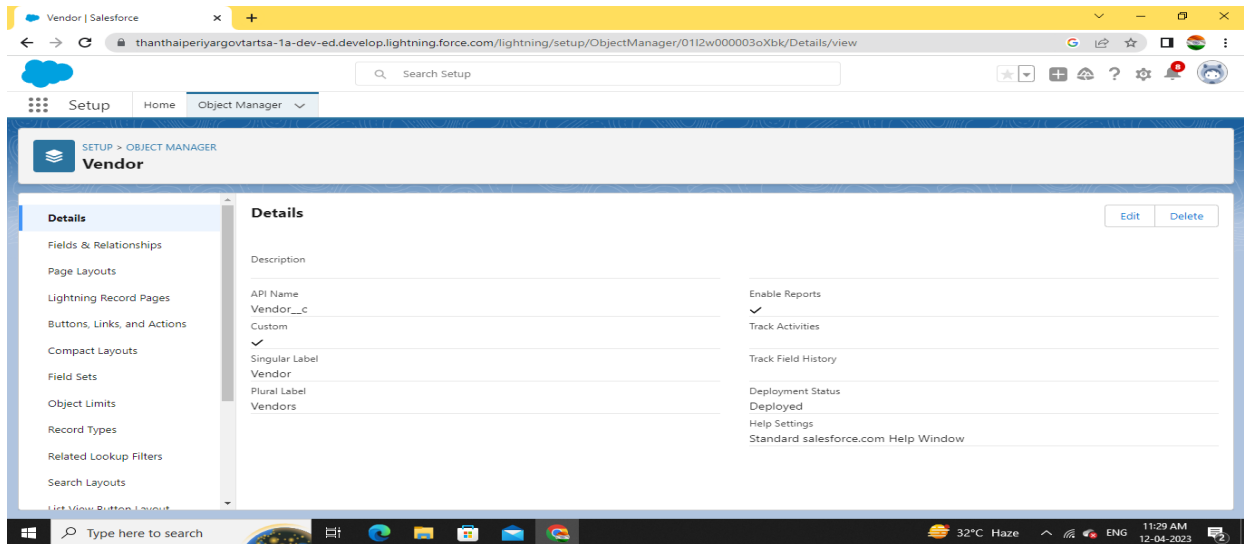
Activity - 5 Speaker



Description:

- Create Speaker Objects

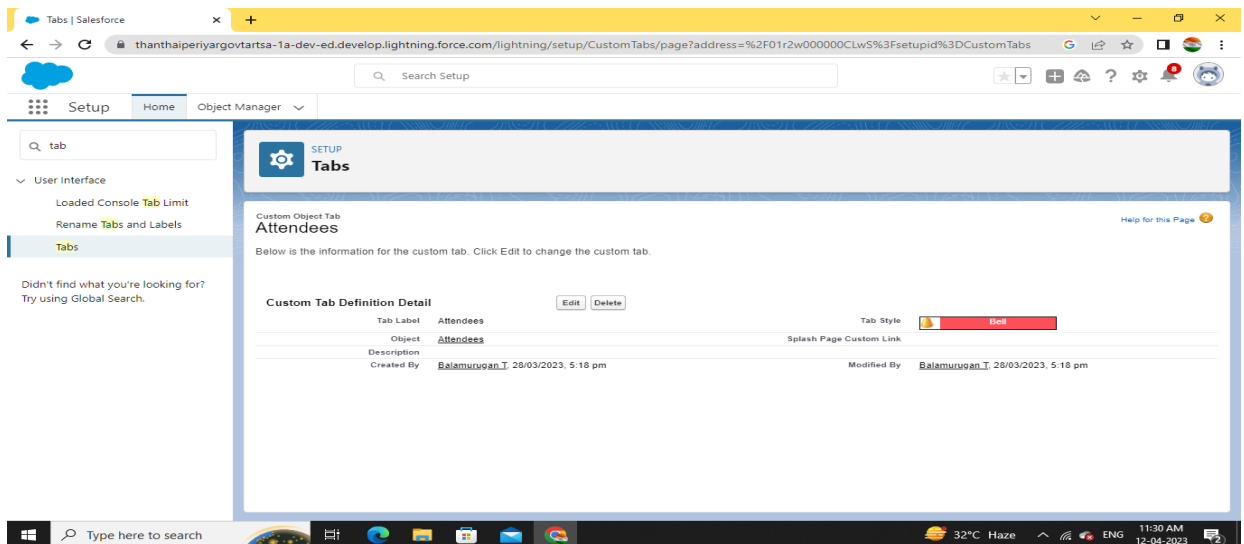
Activity - 6 Vendor



Description:

- Create Vendor Objects

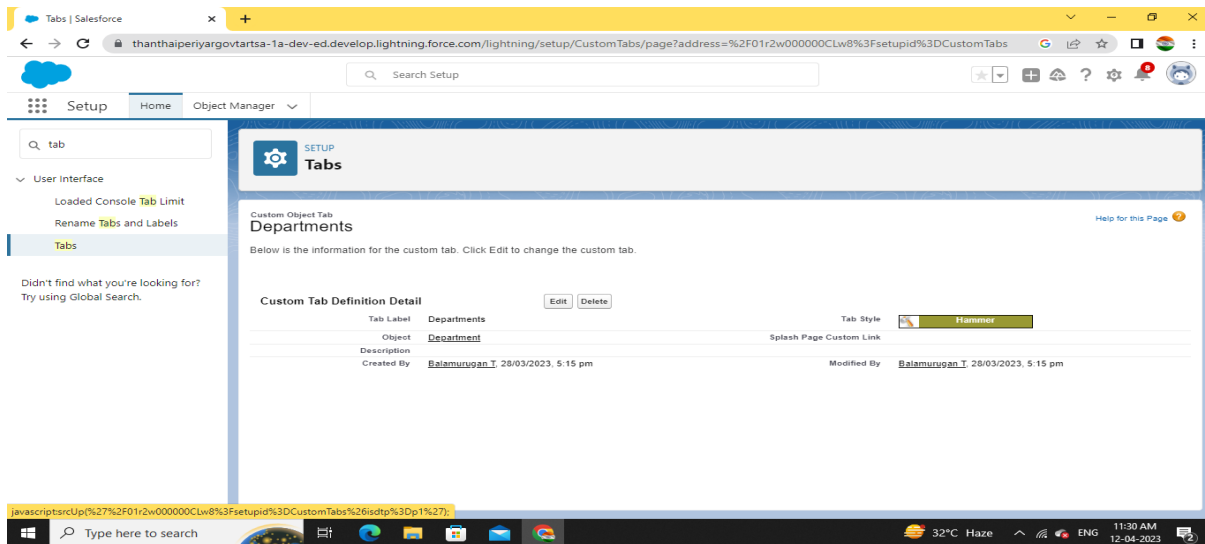
Activity - 7 Attendees tabs



Description:

- Create Attendees tabs

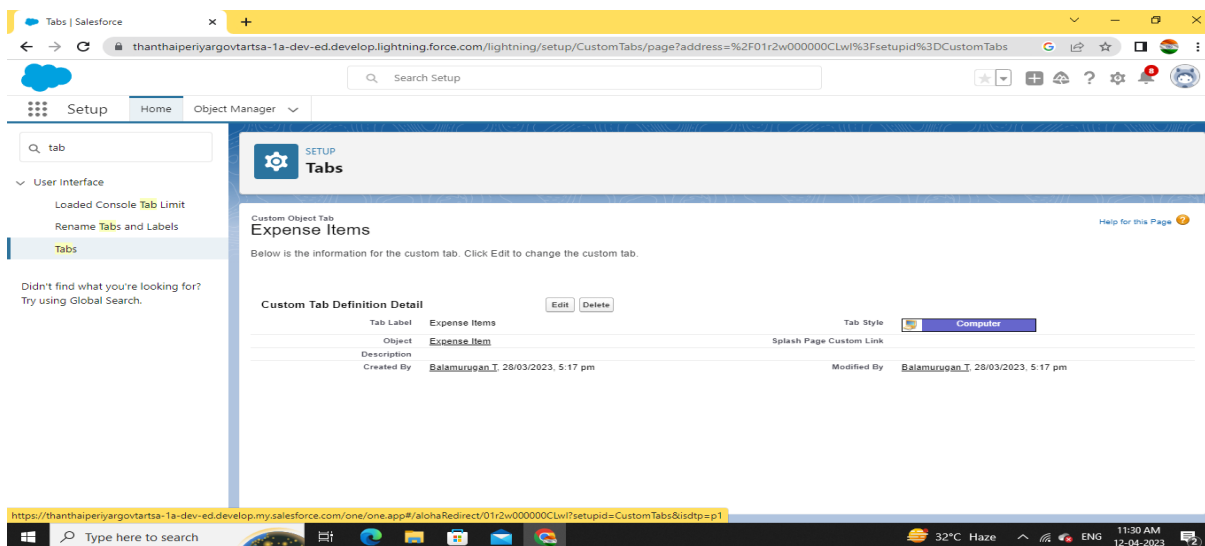
Activity - 8 Department tabs



Description:

- Create Departments tabs

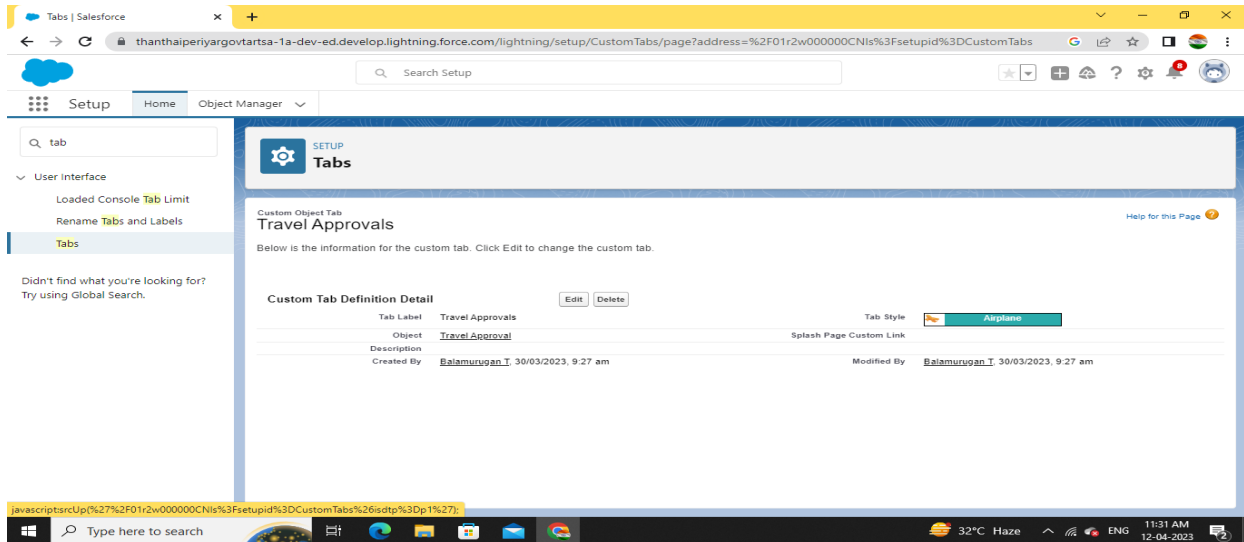
Activity - 9 Expense item tabs



Description:

- Create Expense Items Tabs

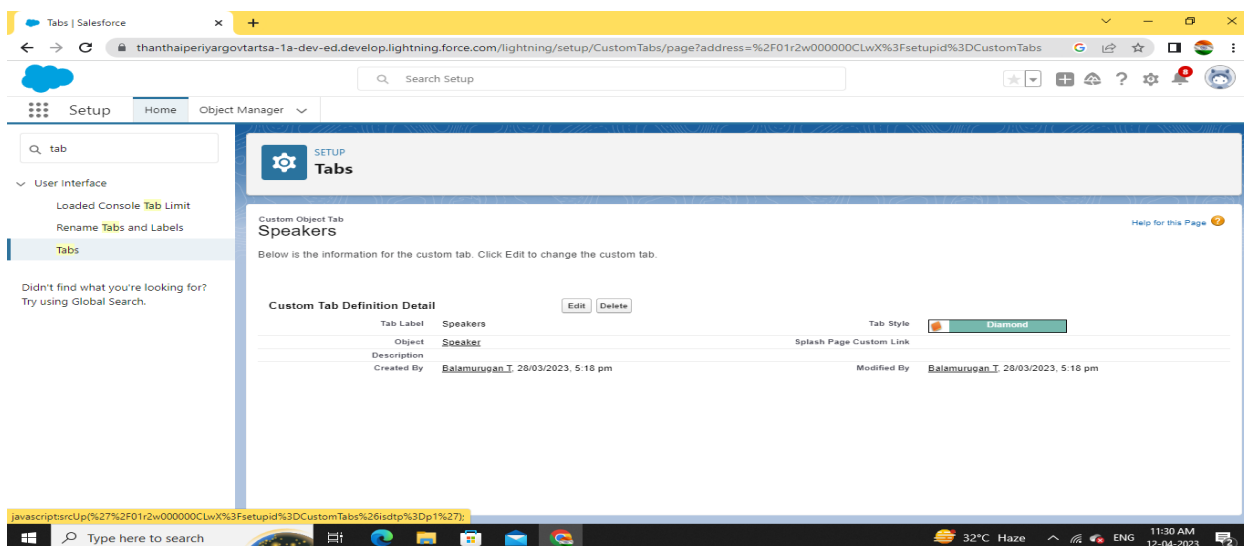
Activity - 10 Travel Approval tabs



Description:

- **Create Travel Approval Tabs**

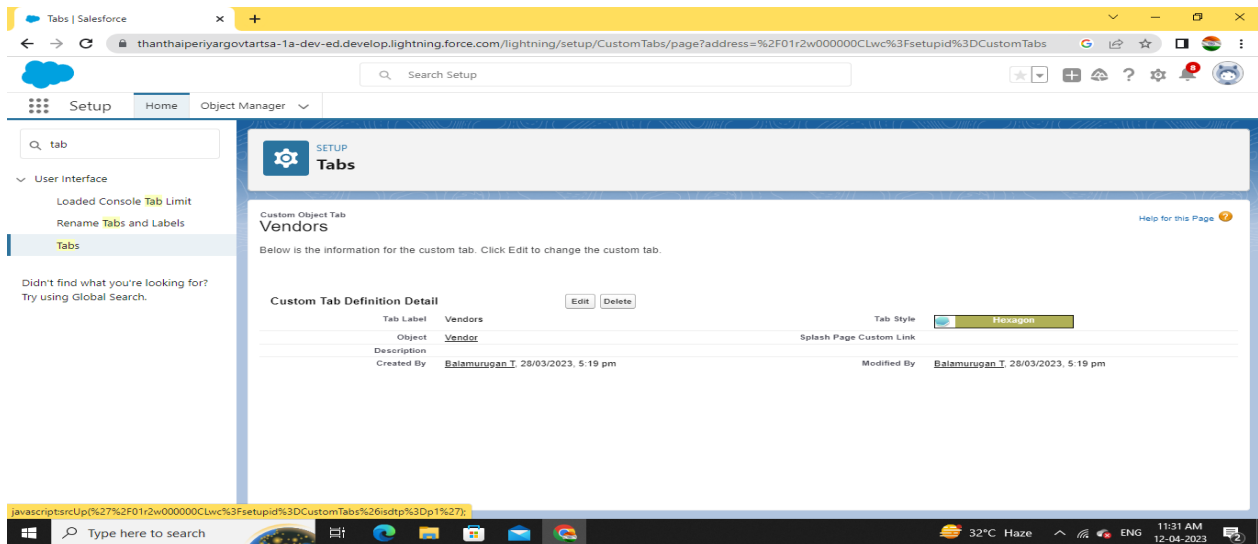
Activity - 11 Speaker tabs



Description:

- **Create Speaker Tabs**

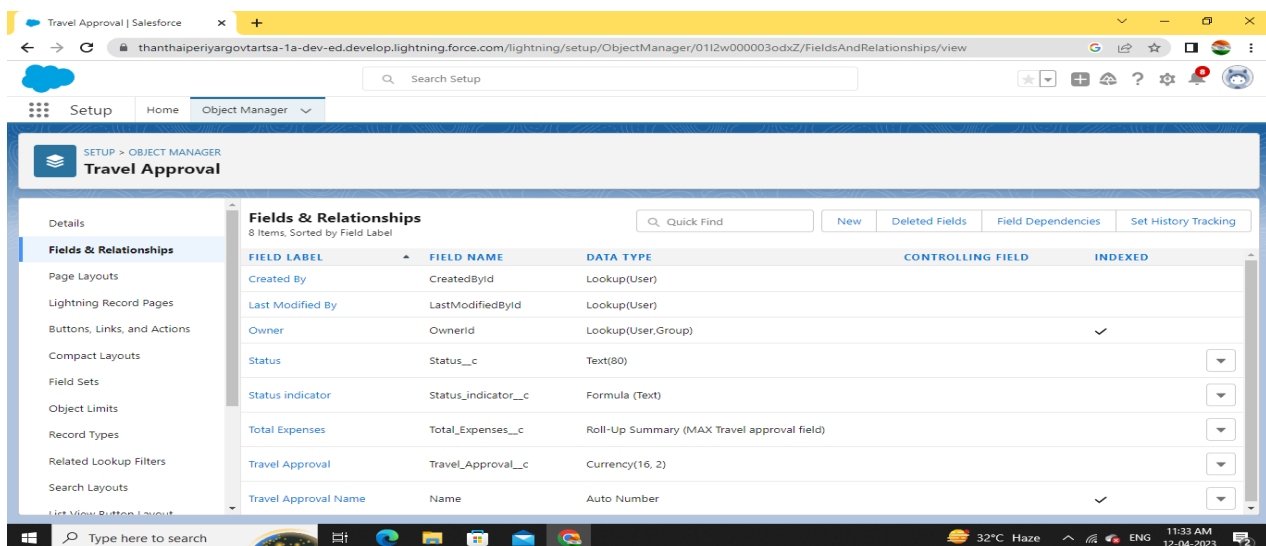
Activity - 12 Vendor tabs



Description:

- Create Vendor tabs

Activity - 13 Travel Approval Field and Relationship



Description:

- Create Fields and Relationship
- Travel Approval

Activity - 14 Expense item Field and Relationship

Expense Item | Salesforce

thanthaipeiyargovtartsa-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003oXb6/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

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
Created By	CreatedById	Lookup(User)		
Expense	Expense_c	Picklist		
Expense Item	Expense_item_c	Currency(16, 2)		
Expense Item Name	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Type here to search

32°C Haze 11:33 AM 12-04-2023

Description:

- **Create Fields and Relationship**
- **Expense Items**

Activity -15 Department Field and Relationship

Department | Salesforce

thanthaipeiyargovtartsa-1a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003oXar/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Department

Details

Fields & Relationships
5 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	Currency(16, 2)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Travel Approval #	Name	Auto Number		✓

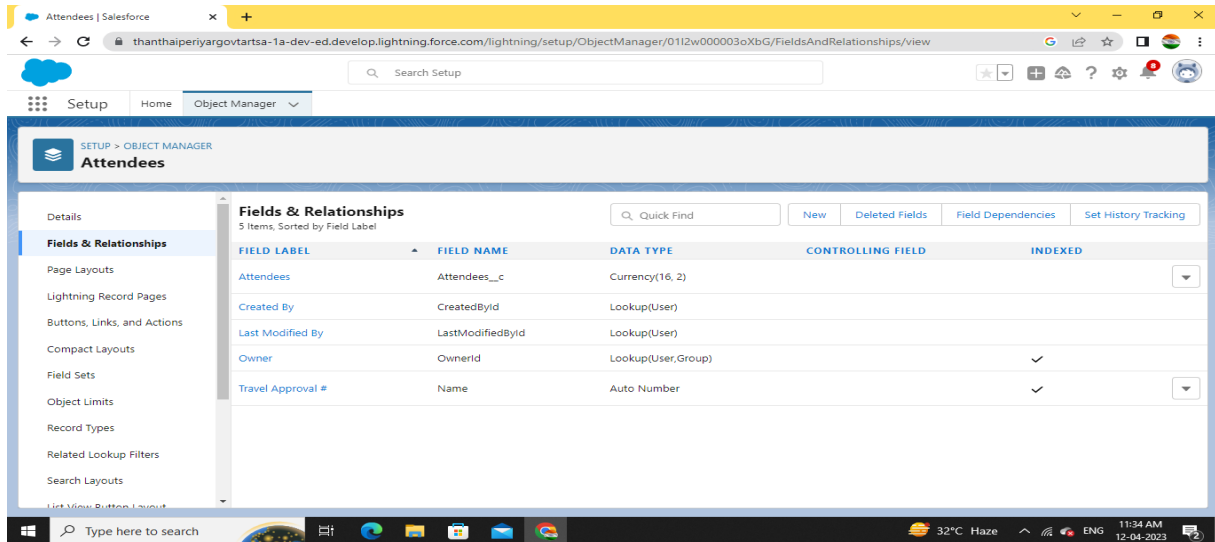
Type here to search

32°C Haze 11:33 AM 12-04-2023

Description:

- Create fields and Relationship
- Departments

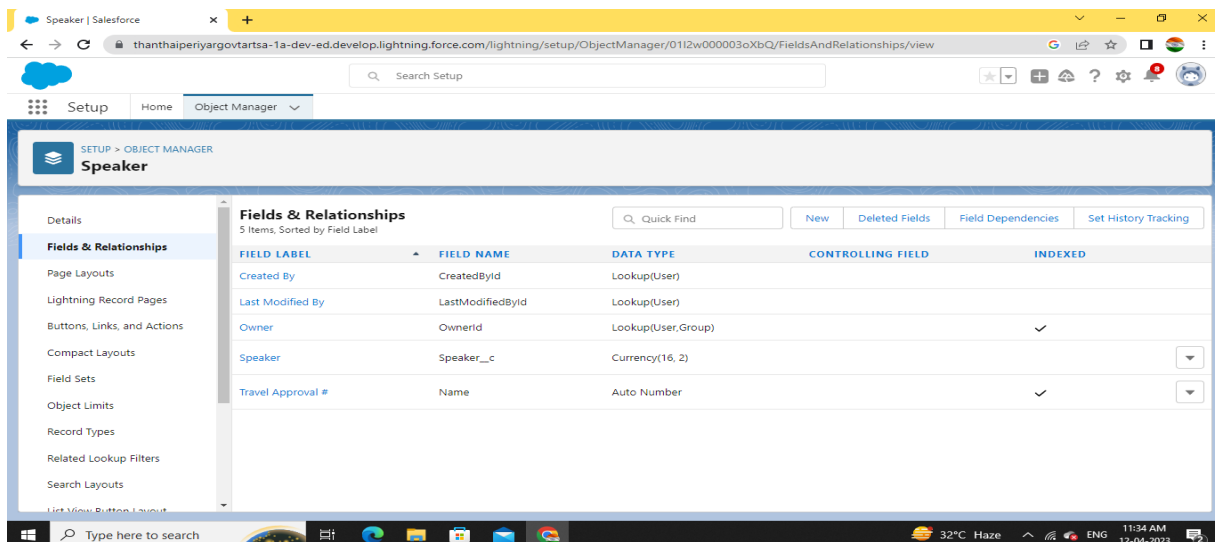
Activity - 16 Attendees Field and Relationship



Description:

- Create Field and Relationship
- Attendees

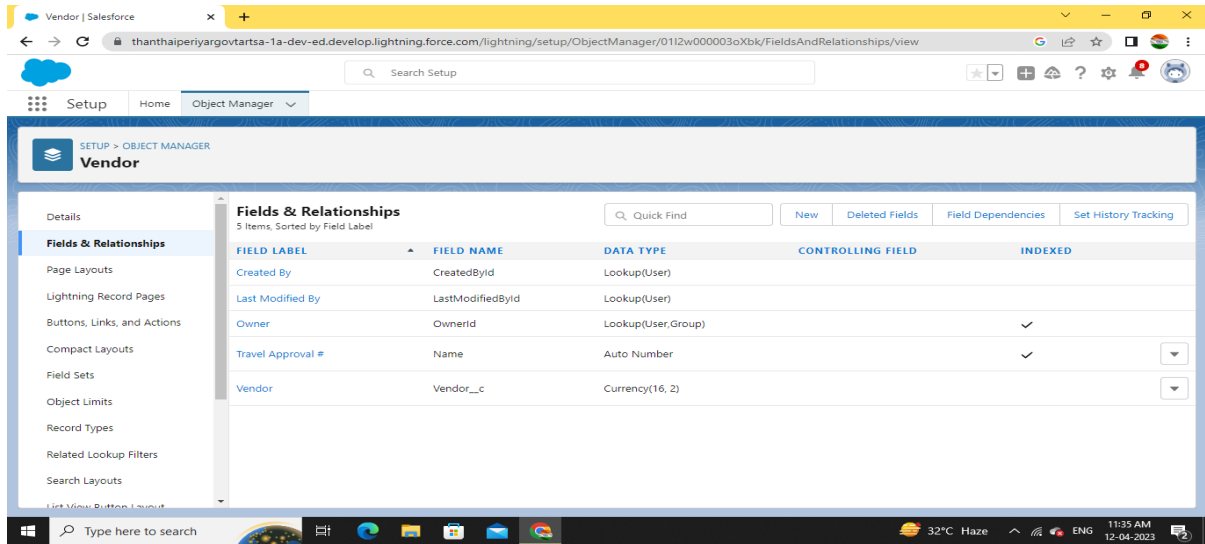
Activity - 17 Speaker Field and Relationship



Description:

- Create Field and relationship
- Speaker

Activity - 18 vendor Field and Relationship

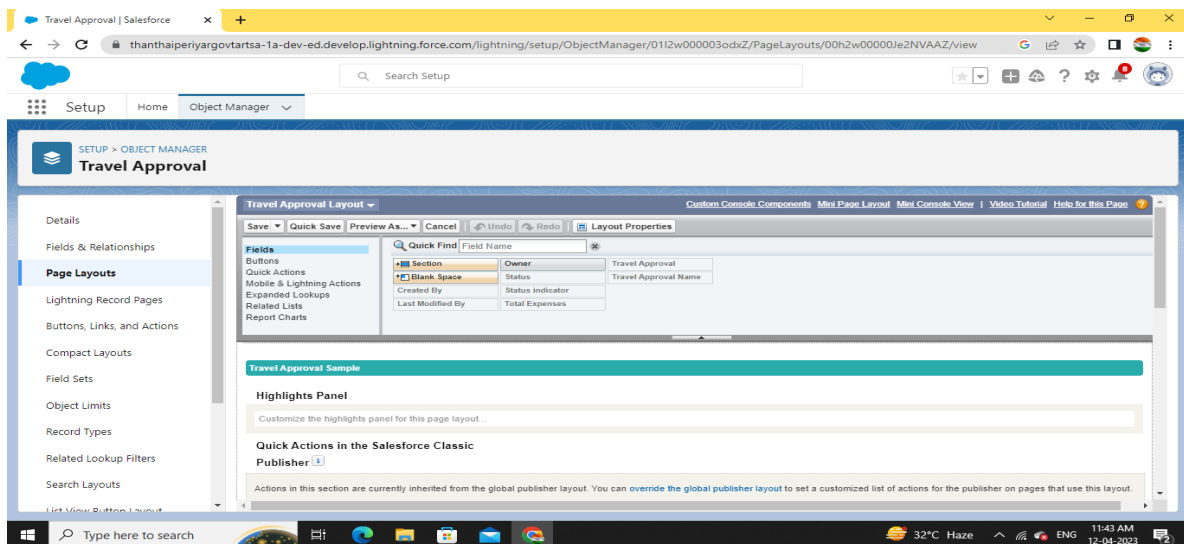


Description:

- Create Fields And Relationship
- Vendor

Activity - 19 users

Activity - 20 Page layout for Travel Approval



Description:

- Create page Layout for Travel Approval

Activity - 21 Validation Rule for Travel Approval

The screenshot shows the Salesforce Setup interface for the 'Travel Approval' 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, and List View Button Layout. The main content area is titled 'Travel Approval Validation Rule' and includes a 'Back to Travel Approval' link. Below this is the 'Validation Rule Detail' section, which contains the following information:

Validation Rule Detail		Active
Rule Name	travel_approval	✓
Error Condition Formula	23<24	
Error Message	Trip_End_Date__c<Trip_Start_Date__c	Error Location: Travel Approval
Description		
Created By	Balamurugan.T	30/03/2023, 8:55 am
Modified By	Balamurugan.T	30/03/2023, 8:55 am

Activity - 22 Status Indicator for Travel Approval

The screenshot shows the Salesforce Setup interface for the 'Travel Approval' object, specifically the 'Status indicator' custom field. The left sidebar is the same as the previous screenshot. The main content area is titled 'Travel Approval Custom Field Status indicator' and includes a 'Back to Travel Approval' link. Below this is the 'Custom Field Definition Detail' section, which contains the following information:

Custom Field Definition Detail		Object Name
Field Label	Status indicator	Travel Approval
Field Name	Status_indicator	
API Name	Status_indicator__c	
Description		
Help Text		
Data Owner		
Field Usage		
Data Sensitivity Level		
Compliance Categorization		
Created By	Balamurugan.T	05/04/2023, 10:34 am
Modified By	Balamurugan.T	05/04/2023, 10:34 am

Below the field information is the 'Formula Options' section, which contains the following formula:

```
IF(Status__c = "Approved", IMAGE("/img/samples/tag_green.gif", "Approved"),
IF(Status__c = "Declined", IMAGE("/img/samples/tag_red.gif", "Declined"),
IF(Status__c = "Pending", IMAGE("/img/samples/tag_yellow.gif", "Pending"), null))
```

Description:

- Create Status Indicator For Travel Approval

Activity - 23 Reports

New Accounts Report | Salesforce

Report: Accounts
New Accounts Report

Total Records: 14

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	11/04/2023	Balamurugan T	channel customer	NV	Customer - Channel	-	11/04/2023
2	-	Automated Process	Sample Account for Entitlements	-	-	-	28/03/2023
3	-	Balamurugan T	GenePoint	CA	Customer - Channel	Cold	28/03/2023
4	-	Balamurugan T	United Oil & Gas, UK	UK	Customer - Direct	-	28/03/2023
5	-	Balamurugan T	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	28/03/2023
6	-	Balamurugan T	Edge Communications	TX	Customer - Direct	Hot	28/03/2023
7	-	Balamurugan T	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	28/03/2023
8	-	Balamurugan T	Pyramid Construction Inc.	-	Customer - Channel	-	28/03/2023
9	-	Balamurugan T	Dickenson plc	KS	Customer - Channel	-	28/03/2023
10	-	Balamurugan T	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	28/03/2023
11	-	Balamurugan T	Express Logistics and Transport	OR	Customer - Channel	Cold	28/03/2023

Activity - 24 Dashboard

travel | Salesforce

Dashboard: travel

Last refreshed 6 days ago. Refresh this dashboard to see the latest data.
As of 06-Apr-2023, 5:51 am Viewing as Balamurugan T

Refresh Edit Subscribe

New Accounts Report

Last Activity	Account Owner	Account Name	Billing State/Province	Type
- Automated Process		Sample Account for Entitlements	-	-
- Balamurugan T		GenePoint	CA	Customer - Channel
- Balamurugan T		United Oil & Gas, UK	UK	Customer - Direct
- Balamurugan T		United Oil & Gas, Singapore	Singapore	Customer - Direct
- Balamurugan T		Edge Communications	TX	Customer - Direct

View Report (New Accounts Report)

Description:

- Create Dashboard

Public report folder

4 Trailhead Profile Public URL

Team Lead : <https://trailblazer.me/id/balat19>

Team Member 1 - <https://trailblazer.me/id/boopc2>

Team Member 2 - <https://trailblazer.me/id/dhant16>

Team Member 3 - <https://trailblazer.me/id/chandru33>

5 ADVANTAGE AND DISADVANTAGE

Advantages:

- Getting the best inventory
- Cutting down on travel costs
- Integrating core Processes
- Employee travel Safety
- complying to travel policy

Disadvantages:

- Limiting control over expenses
- Key information doesn't reach the right people
- Manual process are inefficient

Application:

- About the Sample Application
- Prerequisites
- Installing the sample Application
- 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 with Flight and Hostel Information
- Adding Additional Expenses to your Travel Requests
- Logging in as a Manager for Approving Travel Requests
- Approving a Travel Request

Conclusion:

Those who do get the chance, it brings excitement in their lives and teaches them new things. No matter how a travelling experience may go, whether good or bad, it will definitely help you learn. We have seen in this chapter, tourism is a complex system that is built up of industry sectors including accommodation, recreation and entertainment, food and beverage services, leisure, or other purpose. And because of this large scope, tourism development requires participation from all walks of life, including private business, government agencies, educational institution, communities, and citizens.

The business of attracting and serving the needs of people travelling and staying outside their home communities for business and pleasure.

Future scope:

Innovation and technology in travel agency business in the new normal, people are looking for personalized service along with convenience of technology. There is a large opportunity to empower agents and small travel firms with best priced inventory, websites, digital payments and other tools. These facilities combined with ability of the small agencies to deliver great and seamless experience to their customers will be the powerful combination for the continued dominance of the travel agent market in the years to come.

Building of domestic travel infrastructure across India prior to the pandemic, India had recorded nearly 1.5 billion domestic travel movements. In the post pandemic scenario, the early wave of revenue boost is being generated by these domestic travellers. People are looking at getting better services and experience as they explore the popular as well as the offbeat destination across the country. There has to be a focus on investing in infrastructure, and further expansion of schemes such as 'Swadesh Darshan'. State government, Indian Railways, and the central government, all need to devote greater human and capital resources to encash the domestic opportunity.