

BUILD AN APPROVAL TRAVEL APPROVAL APPLICATIONS FOR CORPORATES

INTRODUCTION

The project aim is to provide real time knowledge for all students who have basic knowledge of sales force and looking for a realtime project. This project will also help to those professional 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 will.

1.1 OVERVIEW

Creating business travel approval workflow is one of the most crucial steps in preparing the organization for an efficient and effective Business travel management system. It offers many benefits concerning better traveler experience, reduced work burden for the travel admins desk and savings for the organization. The CFO's usually form a small working group from the respective department; HR and Travel Admin to assess their current business travel workflow and redesign it. However, the best advice can come from Corporate Travel Management Solutions providers who are experts in designing a process based on the best practices and the organization's need for customization.

After a travel request has been set up, it moves to the Superiors' (Approving Authority) for approval. Their role is to verify if the travel is for genuine business purpose and there is no out of policy booking made. Also, there can be various possibilities of approval flow. It can be Multilayer: Employee has to get approval from more than one superiors or Multimode: For a specific mode of transport, the approval authority designates to a particular superior. The CFO should have access to the MIS(daily / weekly) to track delays in approval, budget vs. actuals and deviations. System based alerts can save CFO's precious time. This review opens up the goldmine of savings in the Travel Management head.

1.2 OVERVIEW

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

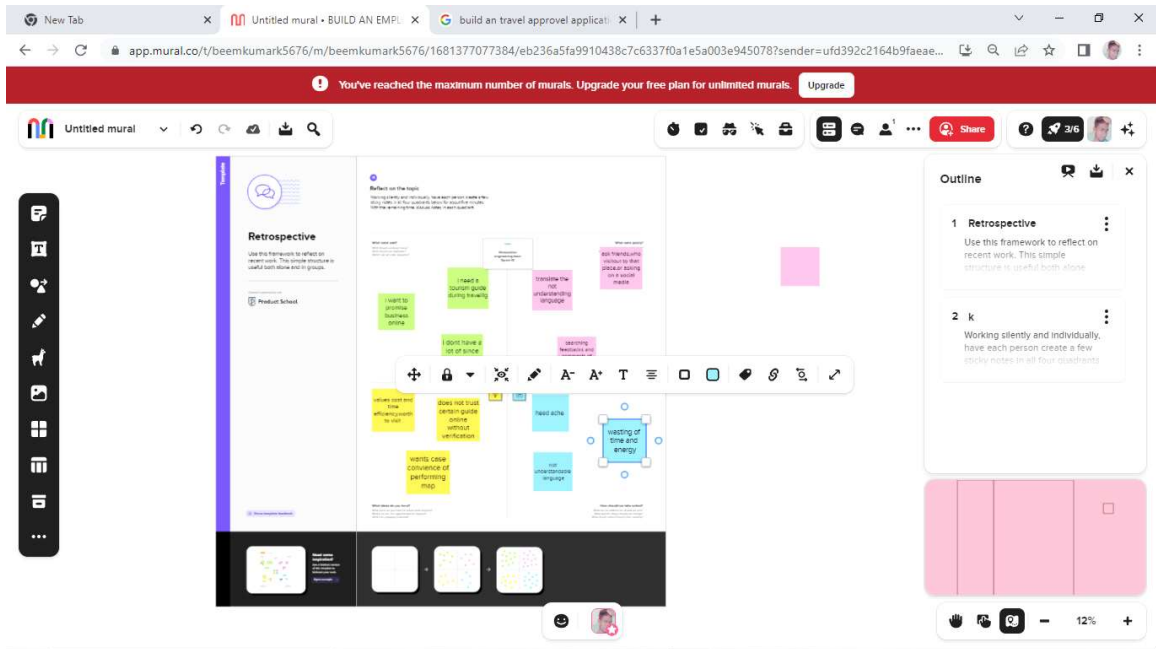
and even more external information such as cell phone expenses or car rentals can be entered with the trip request. For the destination, weather information can be queried. A manager can do both, request own trips as well as approve trips that have been requested by employees. After the manager has approved single or multiple requests, the manager can print an itinerary or receive the itinerary as a PDF file.

The usage of the travel approval application is described below.

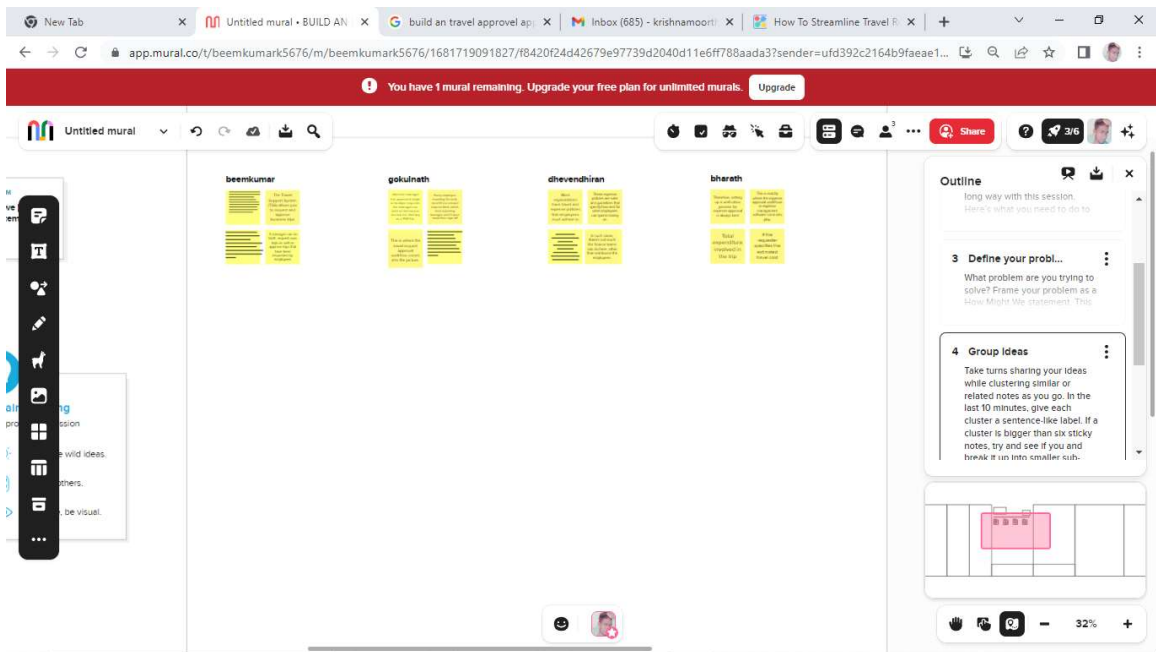
2.PROBLEM DEFINITION &DESIGN THINKING

Employees travel on business trips to attend conferences, perform research, scout potential locations, meet suppliers, visit clients, and for numerous other essential reasons. Whatever the reason, such trips enable them to seek lucrative opportunities, build relationships, solve problems, enhance productivity, and drive growth

2.1 EMPATHY MAP



2.2 IDEATION AND BRAINSTORMING



3.RESULT

3.1 DATA MODEL

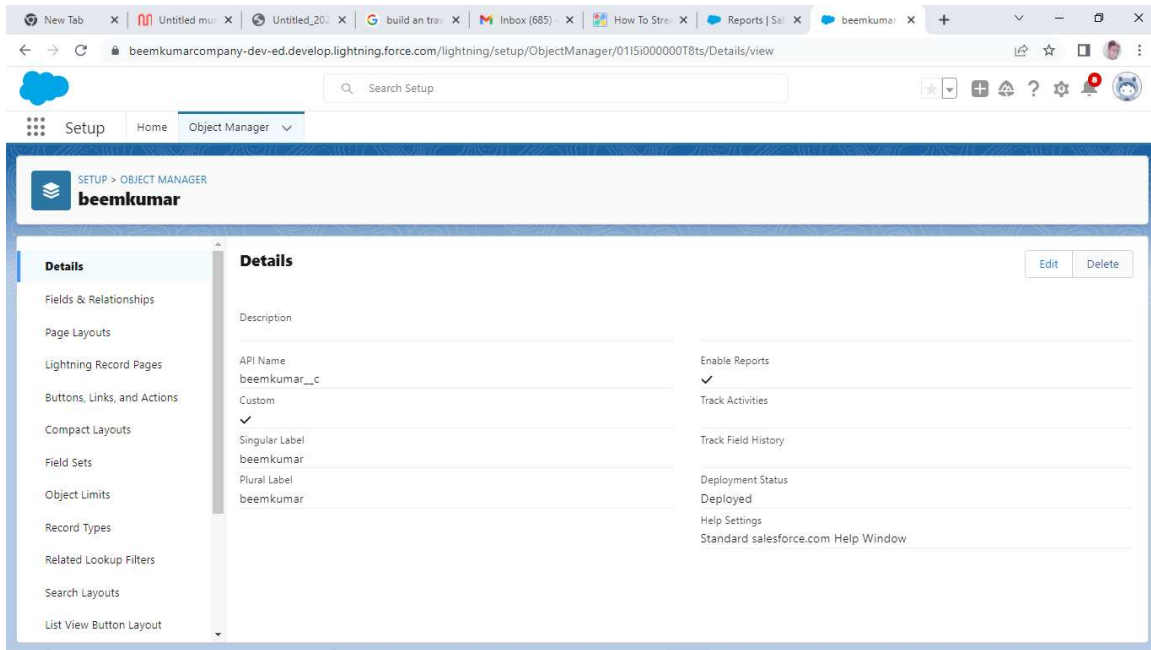
obj-1	field label	data type
1.account	account name	text(80)

obj-2	field label	data type
2.case	case name	text(80)

obj-3	field label	data type
3.contact	contact name	text(80)

obj-4	field label	data type
4.campaign	campaign name	text(80)

3.2 ACTIVITY AND SCREENSHOT



beemkumarcompany-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000T8ts/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
beemkumar

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

Details

Description

API Name
beemkumar__c

Custom
✓

Singular Label
beemkumar

Plural Label
beemkumar

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

beemkumarcompany-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000T8ts/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
beemkumar

Details

Fields & Relationships
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Search Layouts
List View Button Layout

Fields & Relationships

4 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
beemkumar Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

beemkumarcountry-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home

Setup Home Object Manager

Data Import Wizard

Help for this page

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	department	16	0	0	04-12-2023 06:38	106

Bulk Api Monitoring

Before you import your data...

Clean up your data import file
You'll have fewer errors to resolve if your data file is clean and free of duplicates. [Watch video](#)

Make sure your field names match Salesforce field names
You'll be required to map your data fields to Salesforce data fields. Data in unmapped fields is not imported. [View a list of Salesforce data fields](#)

Don't import too many records at once
Using the Data Import Wizard, import up to 50,000 records at a time. Importing too many records can slow down your org for all users, especially during periods of peak usage.

Import your data in 3 easy steps

beemkumarcountry-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000T8ts/PageLayouts/view

Setup Home Object Manager

Page Layouts

1 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
beemkumar Layout	Beemkumar Beemkumar, 12/04/2023, 10:43 am	Beemkumar Beemkumar, 12/04/2023, 10:43 am

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

https://beemkumarcountry-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0115i000000T8ts/FieldsAndRelationships/view

beemkumarcompany-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000T8ts/AlohaSearchLayouts/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
beemkumar

Details
Fields & Relationships
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List View Button Layout

1 Items, Sorted by Layout

LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED
List View	N/A	New, Open in Quip, New From Document, Accept, Change Owner, Import, Change Owner, Printable View

List View Button Layout

https://beemkumarcompany-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0115i000000T8ts/AlohaSearchLayouts/view

beemkumarcompany-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Search...

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

Reports

Recent

1 item

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Accounts Report		Private Reports	Beemkumar Beemkumar	13/4/2023, 1:35 pm	

Created by Me
Private Reports
Public Reports
All Reports

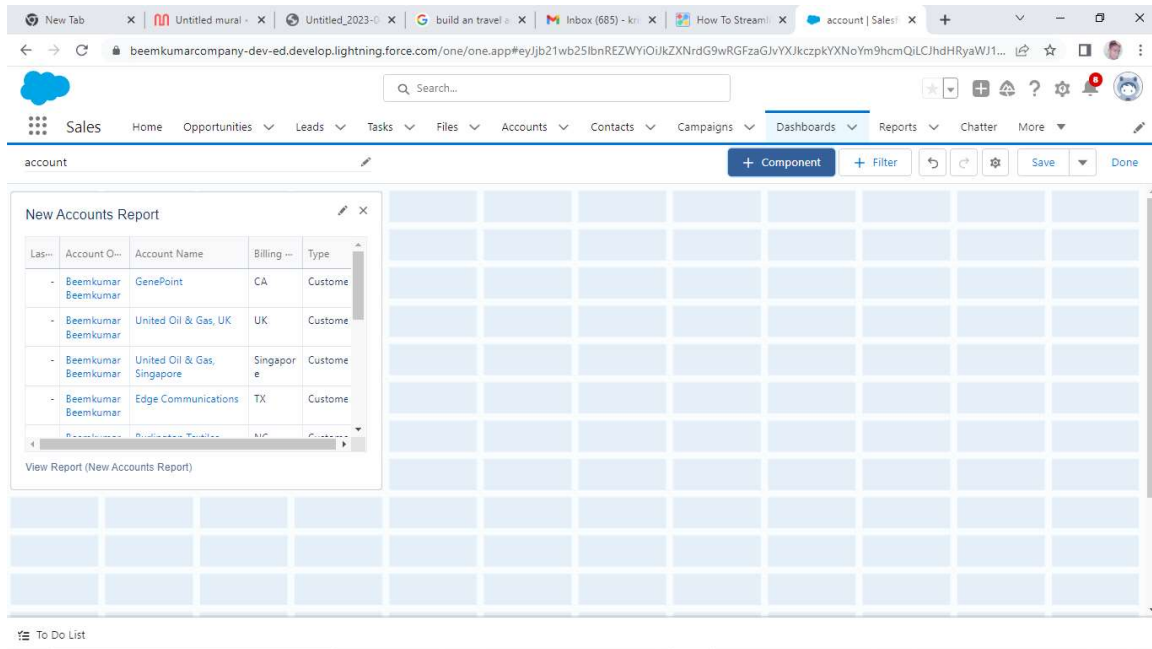
FOLDERS

All Folders
Created by Me
Shared with Me

FAVORITES

All Favorites

To Do List



4. TRAILHEAD PROFILE PUBLIC URL

TEAM LEADER-trailblazer.me/id/bbeemkumar

TEAM MEMBER 1-<http://trailblazer.me/id/gokue6>

TEAM MEMBER 2-<http://trailblazer.me/id/pbharath45>

TEAM MEMBER 3-<http://trailblazer.me/id/ggdhevendhiran>

5. ADVANTAGES

After a travel request has been set up, it moves to the Superiors' (Approving Authority) for approval. Their role is to verify if the travel is for genuine business purpose and there is no out of policy booking made. Also, there can be various possibilities of approval flow. It can be Multilayer: Employee has to get approval from more than one superiors or Multimode: For a specific mode of transport, the approval authority designates to a particular superior. The CFO should have access to the MIS(daily / weekly) to track delays in approval, budget vs. actuals and deviations. System based alerts can save CFO's precious time. This review opens up the goldmine of savings in the Travel Management head.

DISADVANTAGES

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.

Tourists can contribute significantly to land pollution because they generate a large amount of garbage and waste, the majority of which is non-biodegradable, resulting in a large number of landfills. All of these activities may have a significant impact on the region's environment.

Soil erosion, various types of pollution, habitat loss and destruction, and forest fires are just a few of the environmental effects of tourism.

If these areas are not properly conserved and cared for, they will lose their natural essence and be abandoned by tourists. This could result in permanent damage to natural tourist attractions! Fortunately, there has been an increase in demand for sustainable tourism. That will be discussed shortly.

6.APPLICATIONS

People who were previously jobless now have access to a variety of jobs thanks to tourism. Natives who were given regular, dependable jobs have significantly improved their standard of living. Working in places like hotels, restaurants, bars, casinos, theaters, zoos, parks, entertainment venues, and more are included in this list of jobs.

Some of those people you might recall from your previous trip, particularly the travel agent who made your reservations, the tour guide who made sure your journey went without a hitch, or the captain of your Caribbean cruise ship. To make sure you have a good time on your vacations, they work tirelessly and away from their families. This has also helped to lower the nation's overall unemployment rate, which lessens the burden on the government.

CONCLUSION

expense a Most organizations have travel and expense policies that employees must adhere to. These expense policies are rules and guidelines that specify how and for what employees can spend money on.

But, there might be instances when your employees misunderstand the policies and accidentally spend money on non-policy-compliant expenses. In such cases, there's not much

the finance teams can do here, other than reimburse the employees.

Therefore, setting up a verification process for expense approval is always best. This is exactly where the Approval workflows in expense management software come into play.