BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

1. INTRODUCTION

1.1 OVERVIEW :

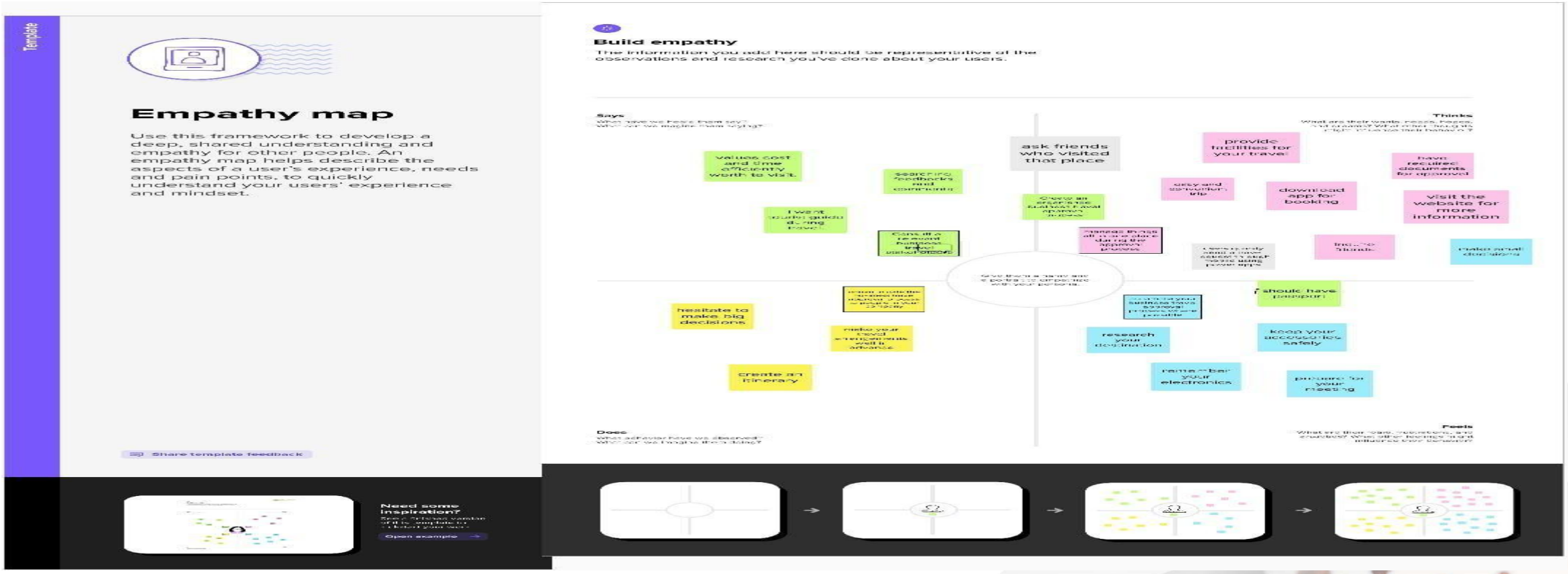
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project.

1.2 PURPOSE :

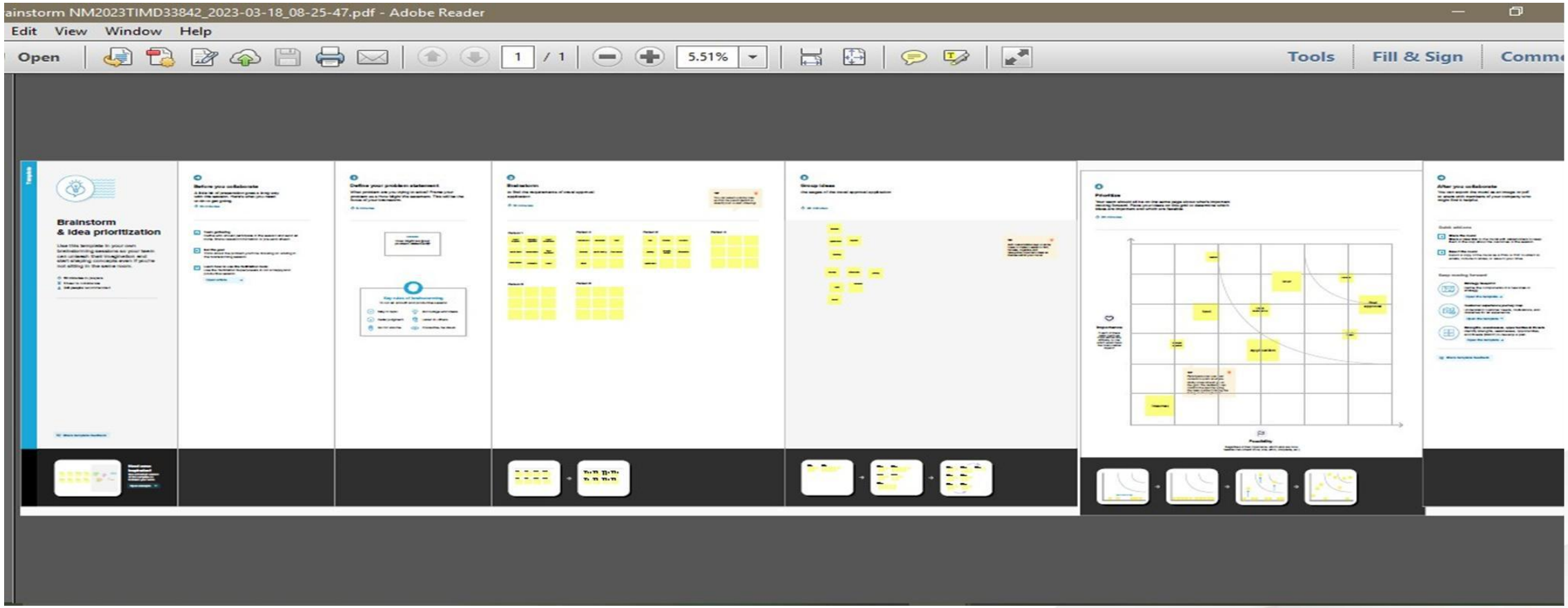
This project will also help to those professionals who are in cross- technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

2. PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP :



2.2 IDEATION AND BRAINSTORMING MAP



3. RESULT

3.1 DATA MODEL :

Object Name	Filed in the object	
Department	Field label	Data Type
	Department code	Text (10)
	Department Name	Text (80)

	Field label	Data Type
Travel Approval	Department	Lookup (Department)
	Destination State	Text (2)
	Out-of-State	Checkbox
	Purpose of trip	Text Area (255)
	Status	Picklist
	Status Indicator	Formula (Text)
	Total Expenses	Roll-Up Summary (Sum Expenses item)
	Travel Approval	Auto Number
	Trip End Date	Date
	Trip Start Date	Date

	Field label	Data Type
Expenses Item	Amount	Currency (16,2)
	Expense Item	Number Auto Number
	Travel Approval	Master-Detail (Travel Approval)

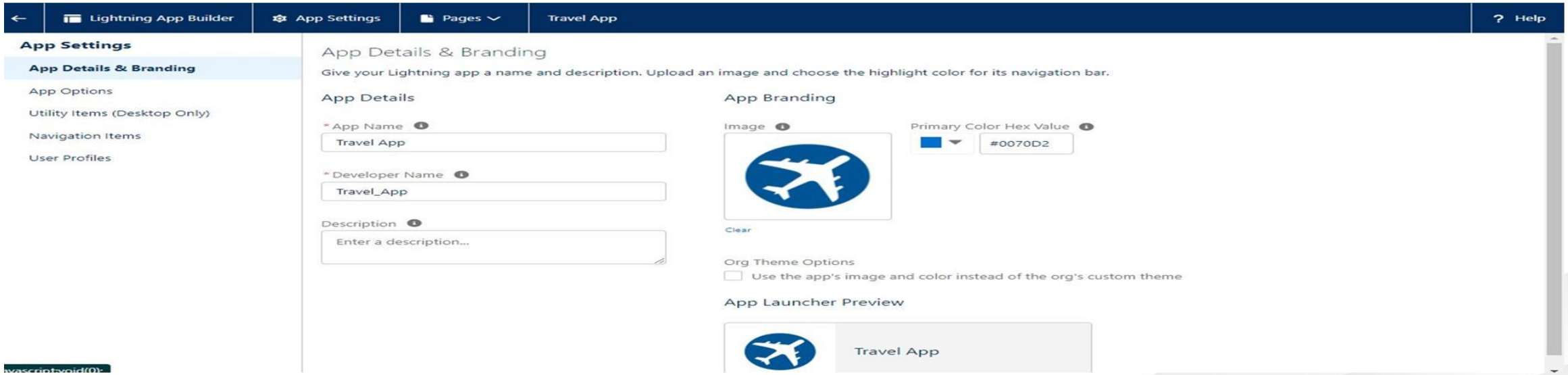
3.2 ACTIVITY AND SCREENSHORT

Milestone 1 - Create Salesforce Org :

We have created the developer account and login for Salesforce account.

Milestone 2 - Creating the Application :

We have created the Travel Application. For that we have used the lighting experience app manager.



Milestone 3 - Object :

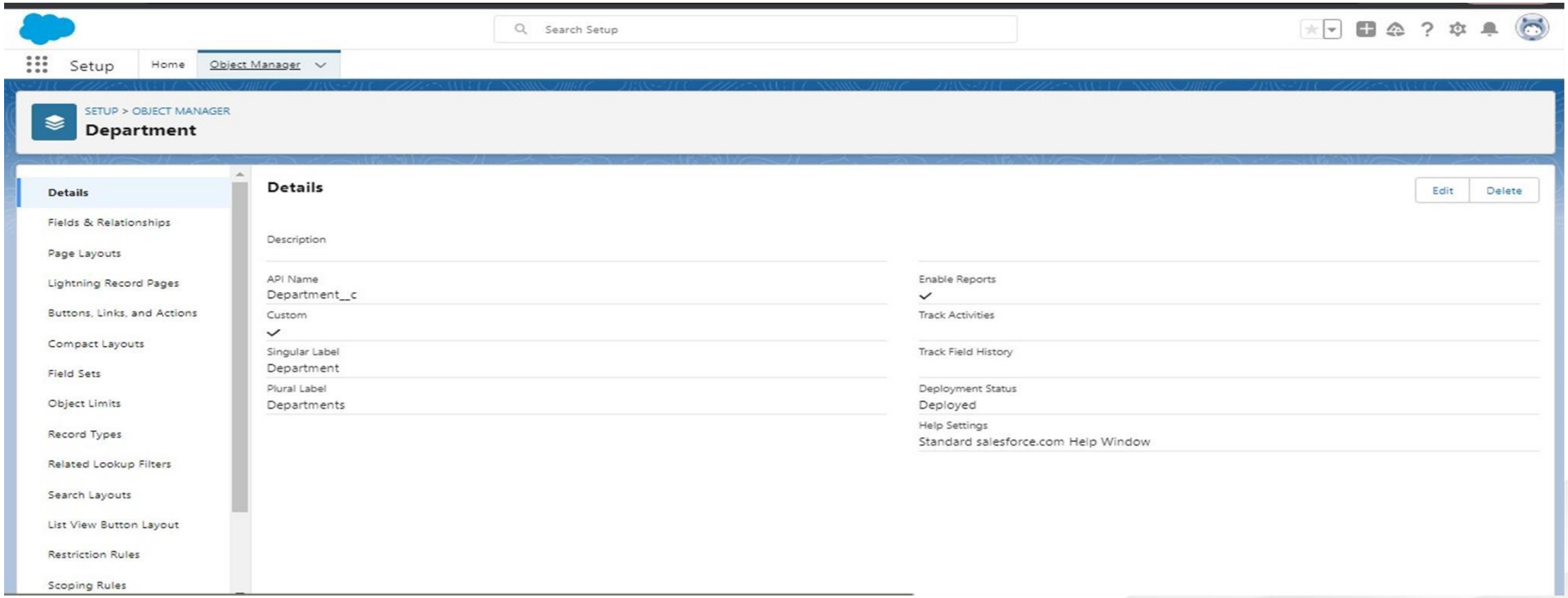
In this Travel Approval application we need to create three objects :

Department

Travel Approval

Expenses Item

Department


Search Setup
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Department
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Fields & Relationships
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Buttons, Links, and Actions
Compact Layouts
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List View Button Layout
Restriction Rules
Scoping Rules
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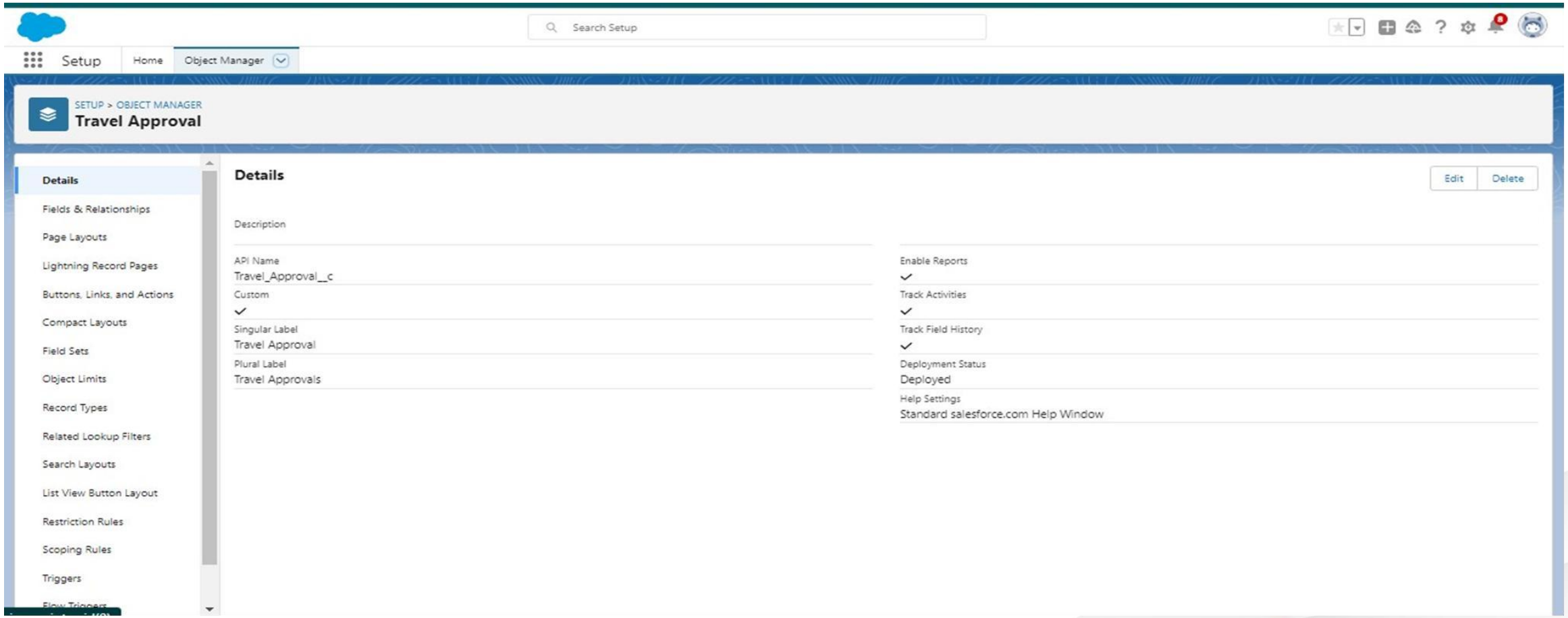
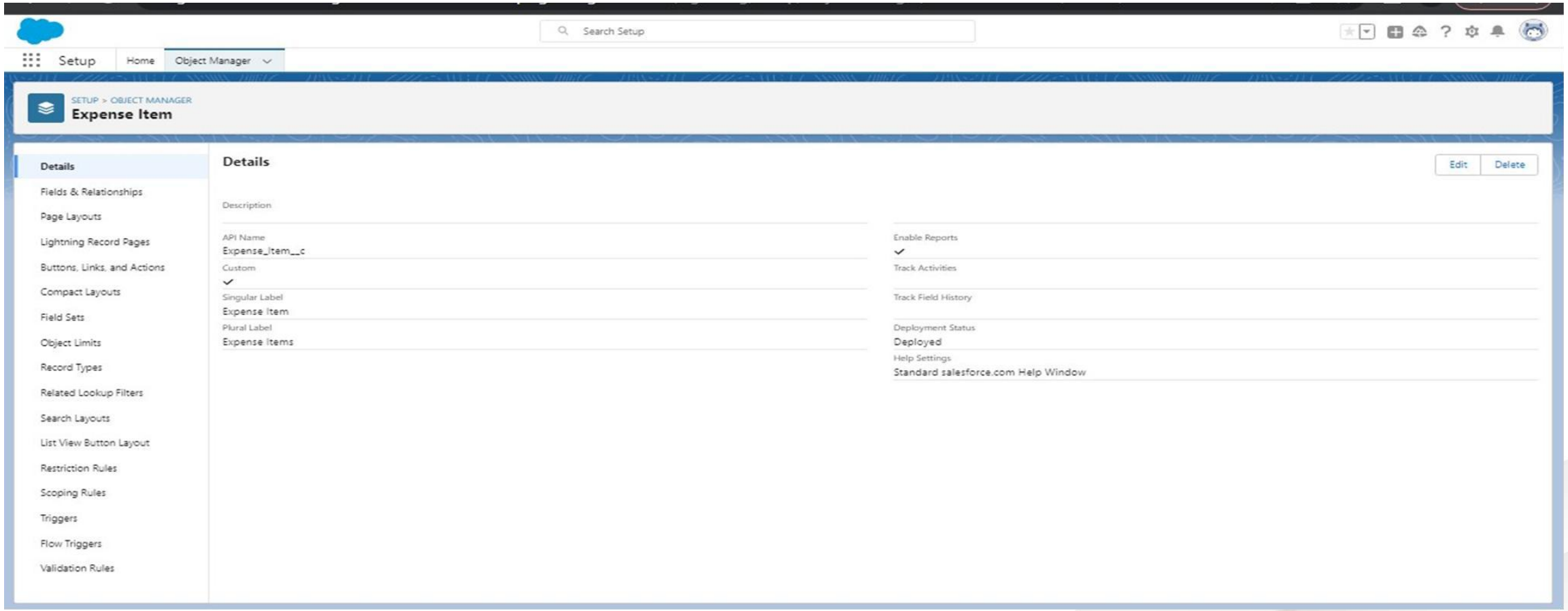
Delete
Description
API Name
Department__c
Custom
Singular Label
Department
Plural Label
Departments
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

Travel Approval

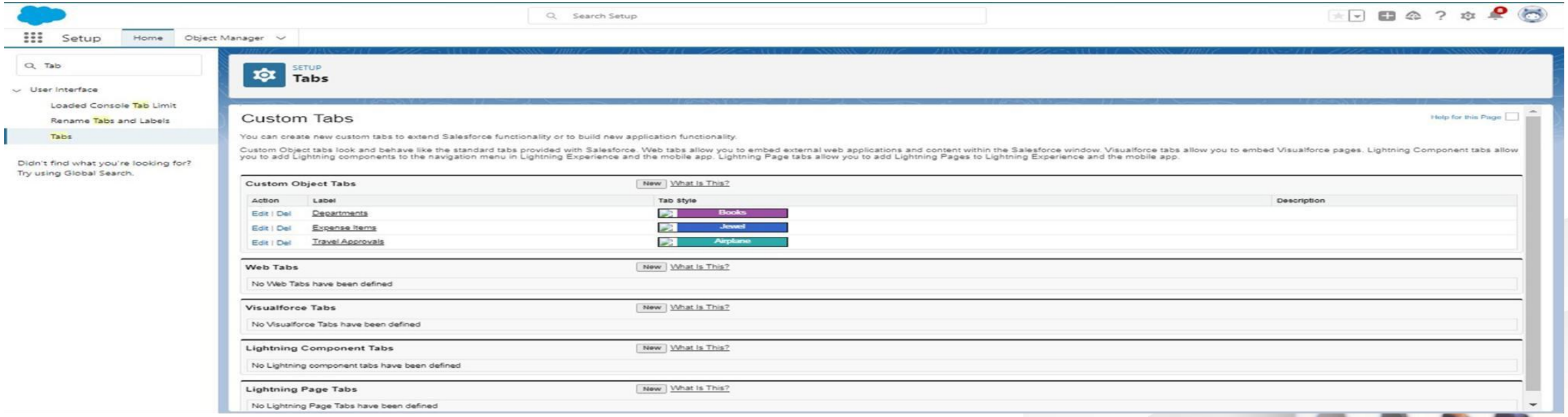


Expenses Item



Milestone 4 - Tab :

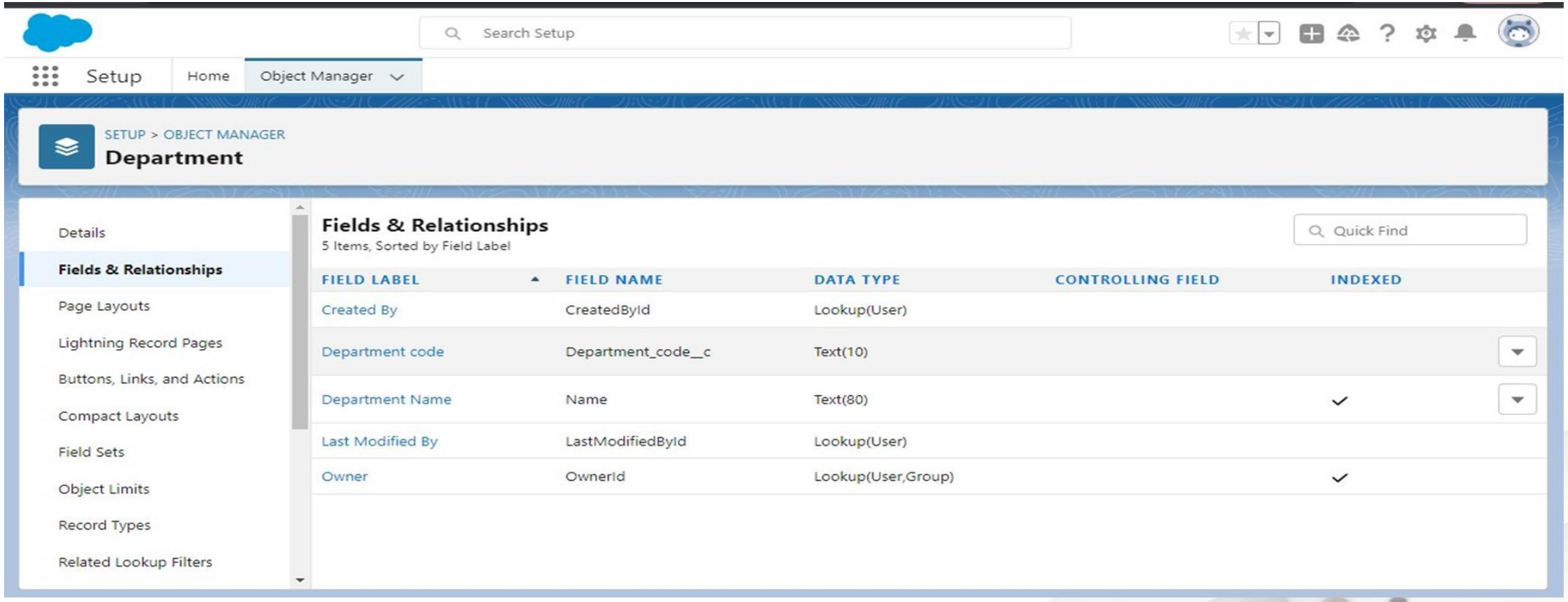
Tab in Salesforce help users to view the information at a glance. It displays the data of objects and other web content in the application.



Milestone 5 - Create-Fields and Relationsships :

Fields in Salesfoce represents about the columns in relational databases mean. It can store data values which are required for a particular object in a record.

Department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Compact Layouts
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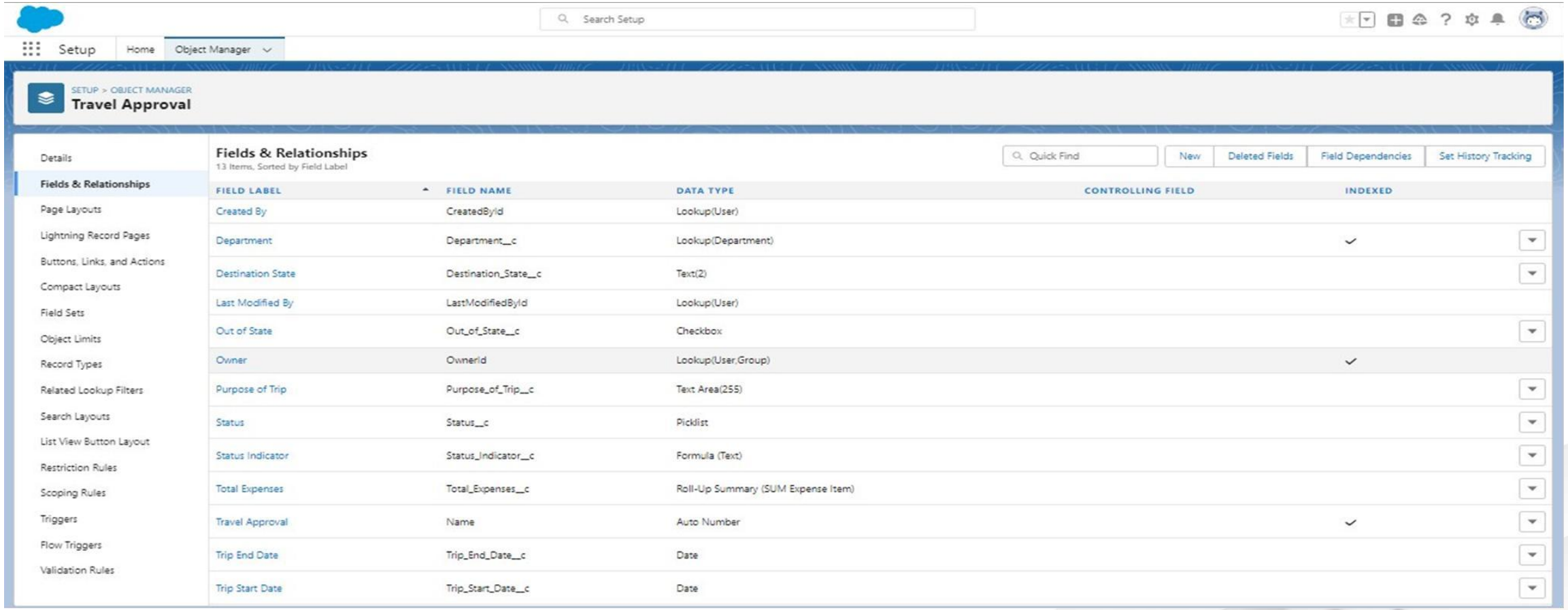
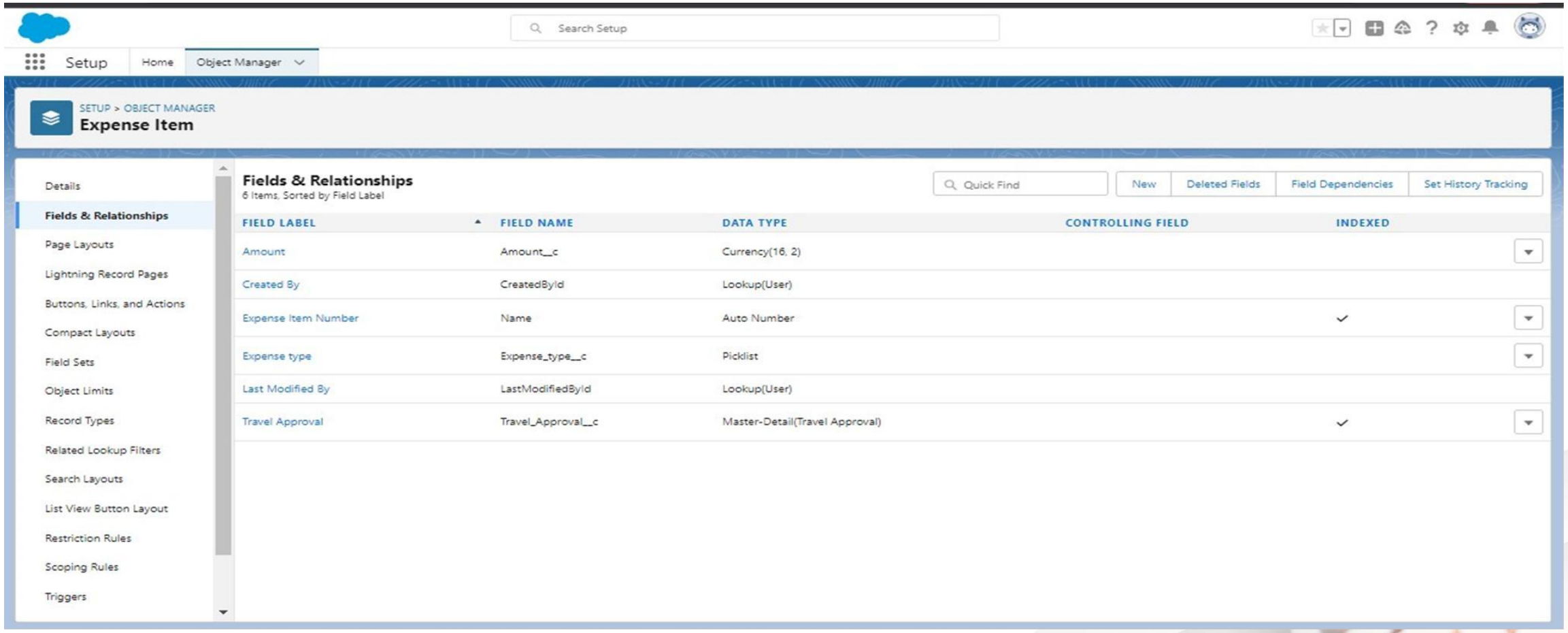
Record Types
Related Lookup Filters
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Department code
Department_code__c
Text(10)
Department Name
Name
Text(80)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)

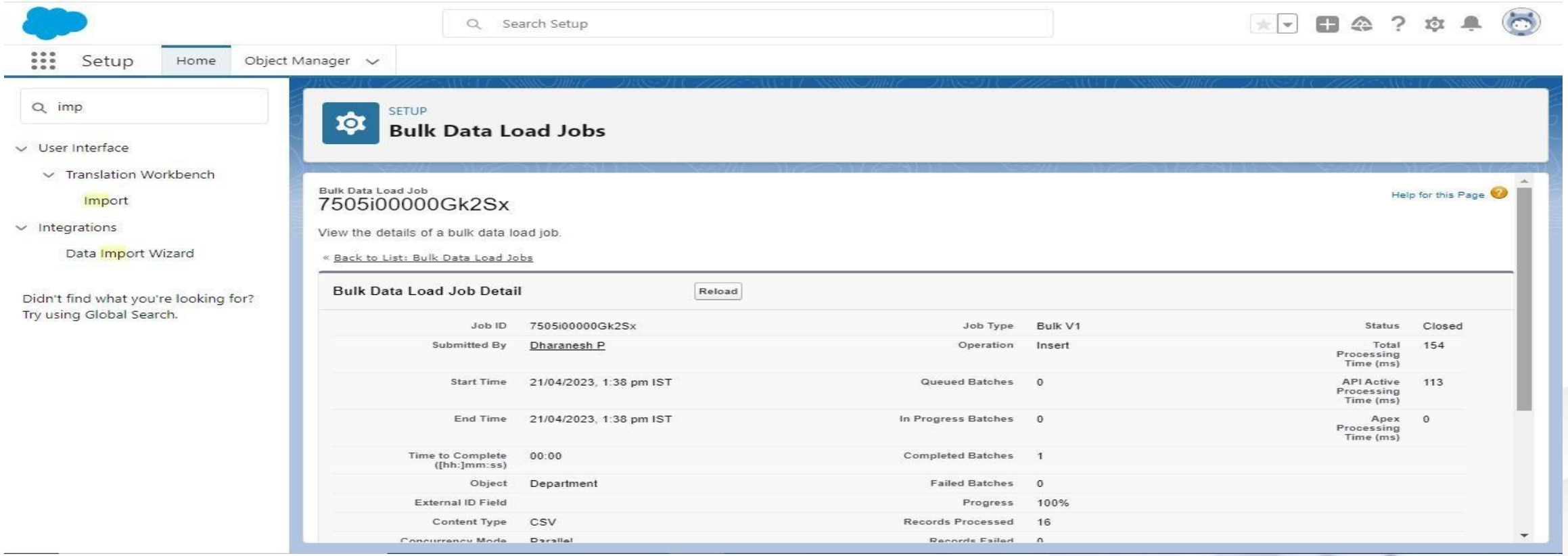
Travel Approval



Expenses Item

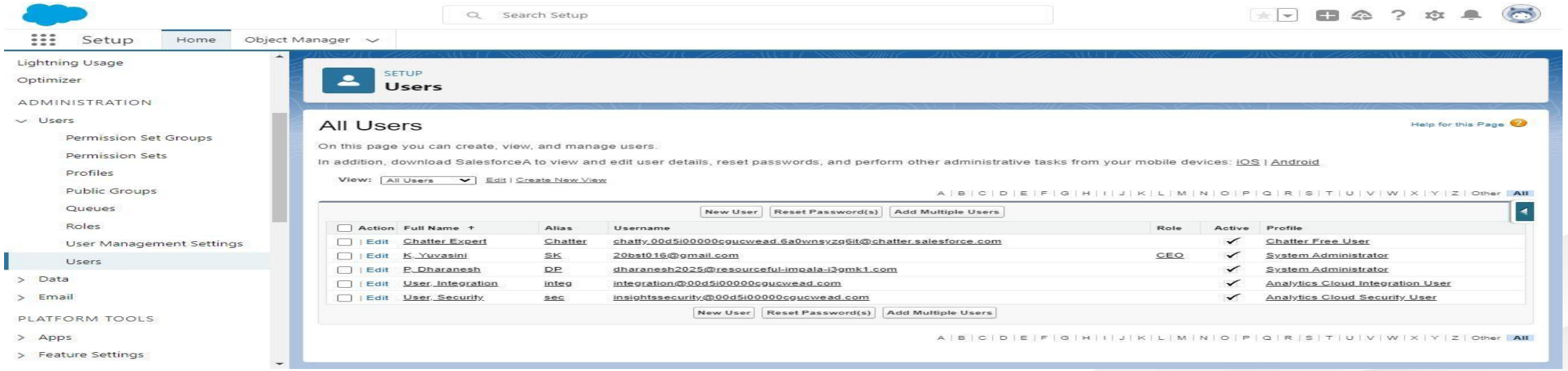


Milestone 6 - Import Department :



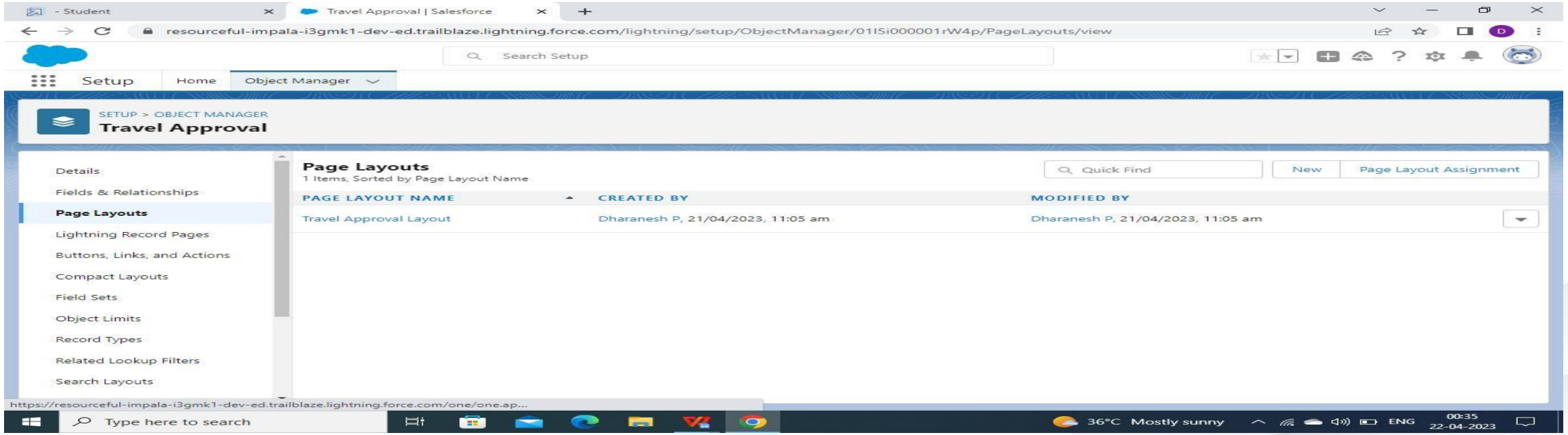
Milestone 7 - Customize User Interspace :

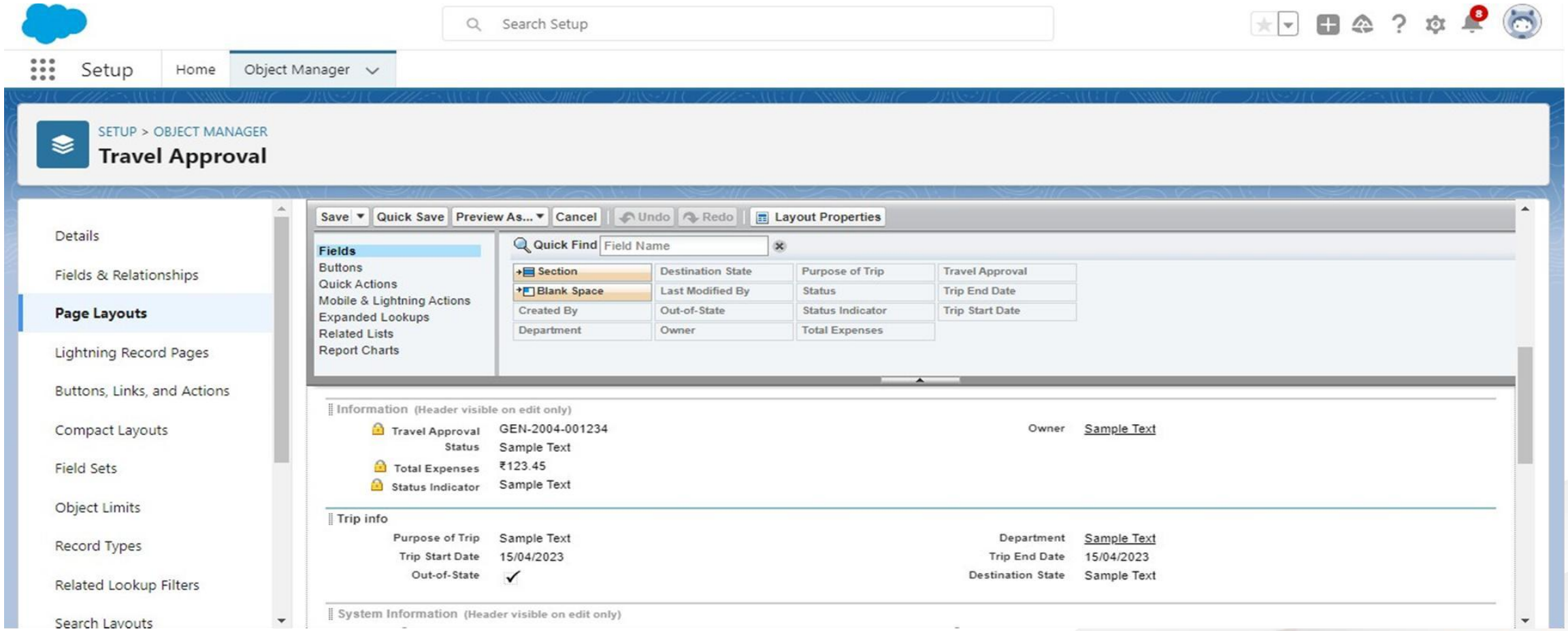
In this Milestone we have setup the users, customizing the page layout.



Milestone 8 - Use Customization :

In this Milestone we have to customized Travel Approval Object Page Layout.

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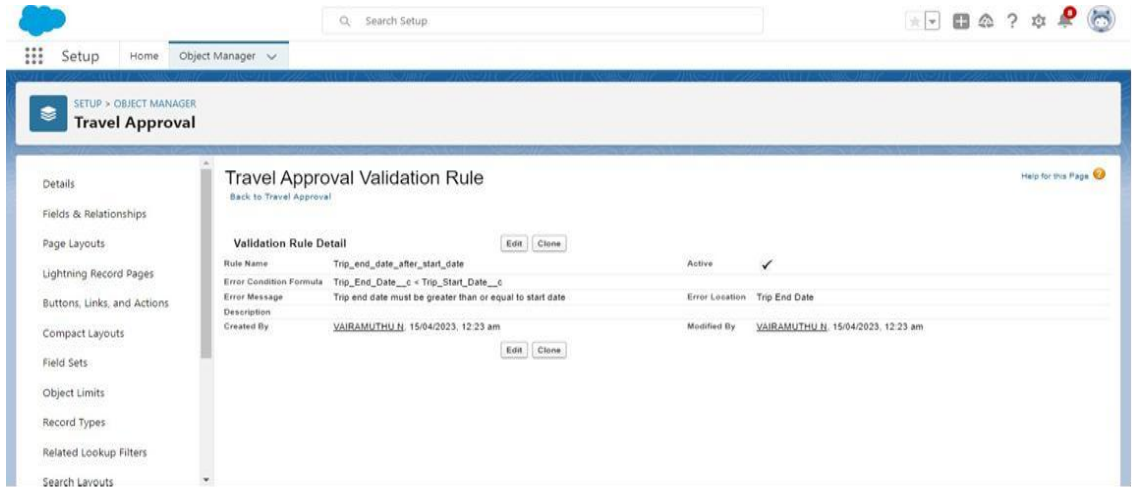
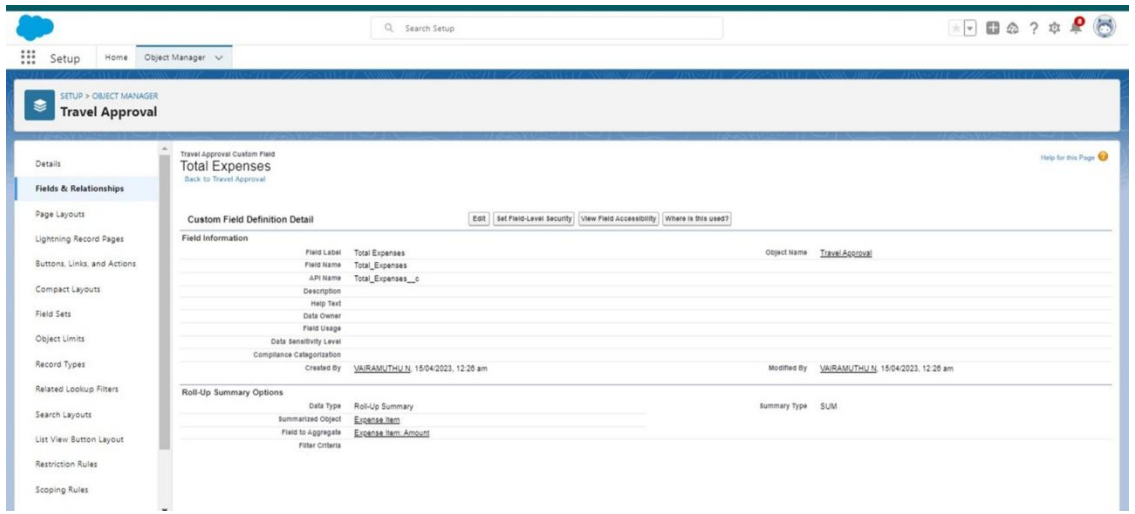
Search Layouts
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Quick Find
Field Name
Section
Blank Space
Destination State
Last Modified By
Out-of-State
Owner
Purpose of Trip
Status
Status Indicator
Total Expenses
Travel Approval
Trip End Date
Trip Start Date
Department
Created By
Information (Header visible on edit only)
Travel Approval
GEN-2004-001234
Status
Sample Text
Total Expenses
₹123.45
Status Indicator
Sample Text
Owner
Sample Text
Trip info
Purpose of Trip
Sample Text
Trip Start Date
15/04/2023
Out-of-State
Department
Sample Text
Trip End Date
15/04/2023
Destination State
Sample Text
System Information (Header visible on edit only)

Milestone 9 - ADD BUSINESS LOGIC TO TRAVEL APP :

In this Milestone we have created validation rules, rollup summary fields, formula fields, workflows and approval process.

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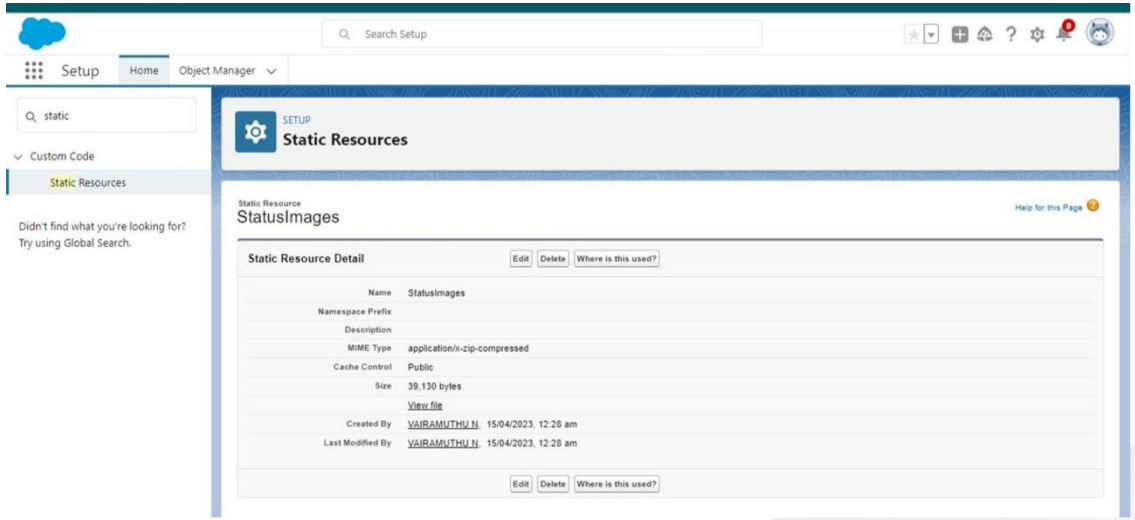
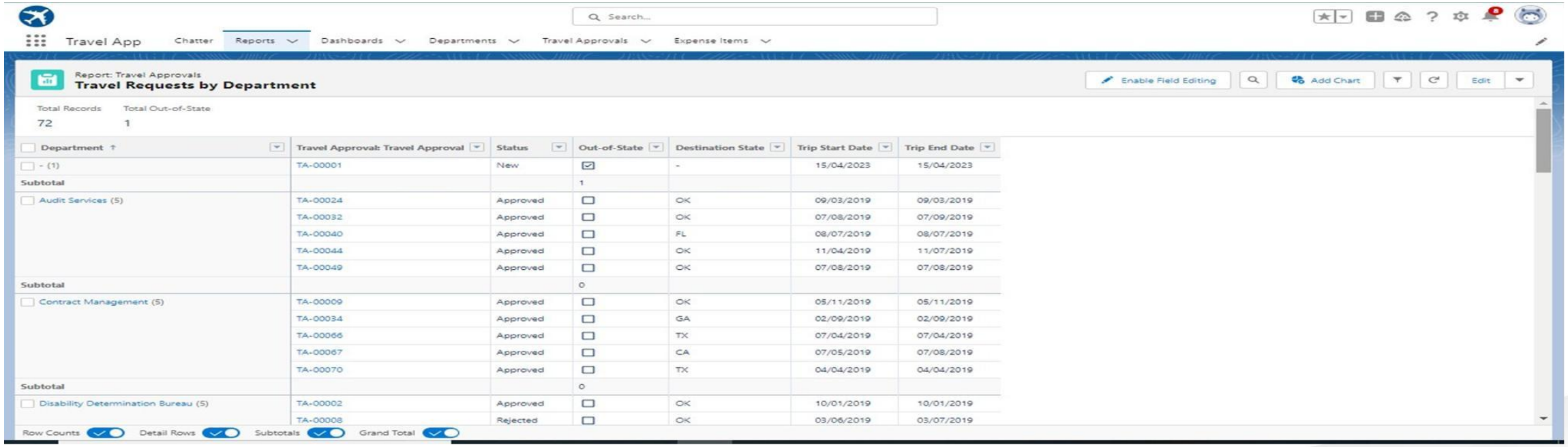
List View Button Layout
Restriction Rules
Scoping Rules
Travel Approval Custom Field
Total Expenses
Back to Travel Approval
Help for this Page
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Total Expenses
Field Name Total_Expenses
API Name Total_Expenses__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By VAIRAMUTHU N, 15/04/2023, 12:26 am
Object Name Travel Approval
Modified By VAIRAMUTHU N, 15/04/2023, 12:26 am
Roll-Up Summary Options
Data Type Roll-Up Summary
Summarized Object Expense Item
Field to Aggregate Expense Item: Amount
Filter Criteria
Summary Type SUM

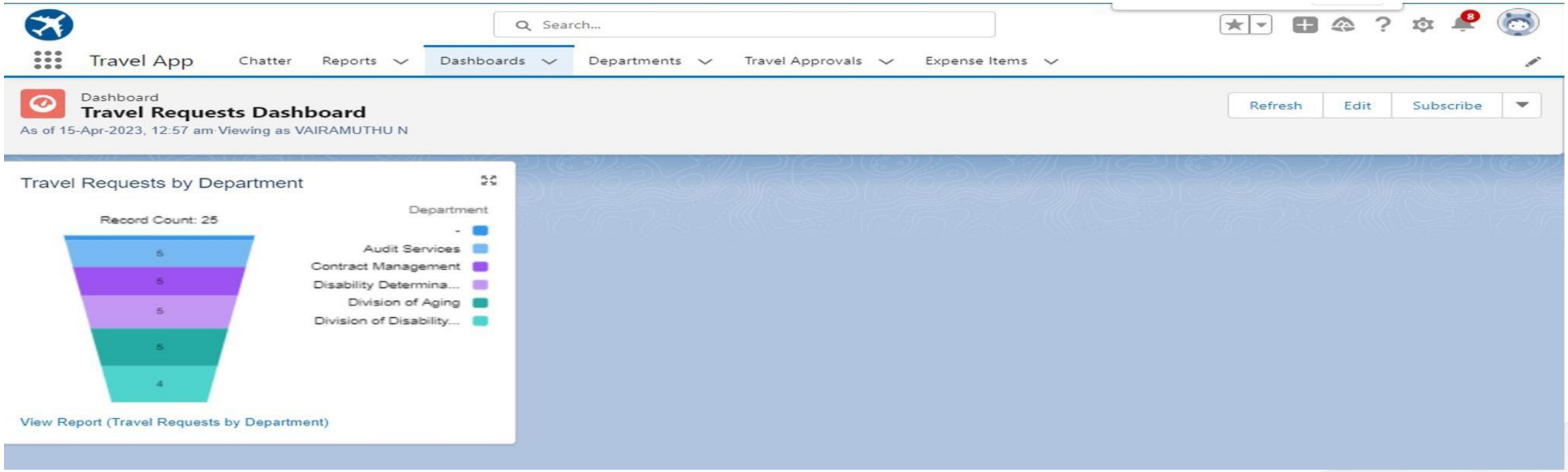

Search Setup
Setup
Home
Object Manager
static
Custom Code
Static Resources
Didn't find what you're looking for?
Try using Global Search.
SETUP
Static Resources
Static Resource
StatusImages
Help for this Page
Static Resource Detail
Edit
Delete
Where is this used?
Name StatusImages
Namespace Prefix
Description
MIME Type application/x-zip-compressed
Cache Control Public
Size 39,130 bytes
View file
Created By VAIRAMUTHU N, 15/04/2023, 12:28 am
Last Modified By VAIRAMUTHU N, 15/04/2023, 12:28 am
Edit
Delete
Where is this used?

Milestone 10- Reports :



Department	Travel Approval: Travel Approval	Status	Out-of-State	Destination State	Trip Start Date	Trip End Date
- (1)	TA-00001	New	☑	-	15/04/2023	15/04/2023
Subtotal			1			
Audit Services (5)	TA-00024	Approved	☐	OK	09/03/2019	09/03/2019
	TA-00032	Approved	☐	OK	07/08/2019	07/09/2019
	TA-00040	Approved	☐	FL	08/07/2019	08/07/2019
	TA-00044	Approved	☐	OK	11/04/2019	11/07/2019
	TA-00049	Approved	☐	OK	07/08/2019	07/08/2019
Subtotal			0			
Contract Management (5)	TA-00009	Approved	☐	OK	05/11/2019	05/11/2019
	TA-00034	Approved	☐	GA	02/09/2019	02/09/2019
	TA-00066	Approved	☐	TX	07/04/2019	07/04/2019
	TA-00067	Approved	☐	CA	07/05/2019	07/08/2019
	TA-00070	Approved	☐	TX	04/04/2019	04/04/2019
Subtotal			0			
Disability Determination Bureau (5)	TA-00002	Approved	☐	OK	10/01/2019	10/01/2019
	TA-00008	Rejected	☐	OK	03/06/2019	03/07/2019

Milestone 11- Dashboard :



4. Trailhead Profile Public URL :

Team Leader : Dharanesh .P
https://trailblazer.me/id/dharp85

Team Member 1 : Kesavan .E
https://trailblazer.me/id/kesae

Team Member 2 : Pooja N.M
https://trailblazer.me/id/pooja2905

Team Member 3 : Yuvasini .K
https://trailblazer.me/id/yuva333sk

5.Advantages & Disadvantages :

Advantages :

1) New experience.
2) Gain my knowledge.
3) Quick service.

Disadvantages :

1) It will be time consuming.
2) Team coordination will it cause in convenient.

6. APPLICATIONS :

The Travel Support System is a small sample application for Natural ONE. As a sample application, its focus is to show Natural ONE functionality rather than being a full-fledged travel support application.

The Travel Support System (TSS) allows as 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.

7. CONCLUSION :

Travel Management simplifies the management process in traveling. Fast processing and immediate results with high security. Minimizing women effort and cost efficient databases. Navigation through the site is easy. It becomes increasingly popular destinations in their own right.

8. FUTURE SCOPE :

It is clear that the online travel business is a booming industry and will continue to be so. Rising to the occasion, even small travel agency owners are also looking to go online. For them, an online travel portal can be an ideal fit.