

BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

INTRODUCTION

Corporate travel is like a nomadic ship sailing the oceans of business is an essential part of successful companies. It's not just about getting from point A to B, it's about providing a safe and efficient experience for employees and making sure company.

An effective corporate travel policy ensures that all involved parties are on the same page with expectations and regulation surrounding employee-initiated trips.

1.1 Overview

A business travel policy is a set of company-specific guidelines that encompass all travel expense-oriented details, including expenses to be reimbursed, how they'll be reimbursed, and the processes your employees need to follow to get approvals.

1.2 Purpose

The company's financial controller typically creates a corporate travel policy, often collaborating with a travel manager. As well as financial elements, the policy can also outline details about

- Whether employees are permitted to fly business class or economy class
- When bookings need to be made
- Guidelines that need to be followed for traveling to a specific destination
- A company dress code or code of conduct
- How and with who all bookings need to be made (including hotels and airlines)

PROBLEM DEFINITION & DESIGN THINKING

Empathy Map

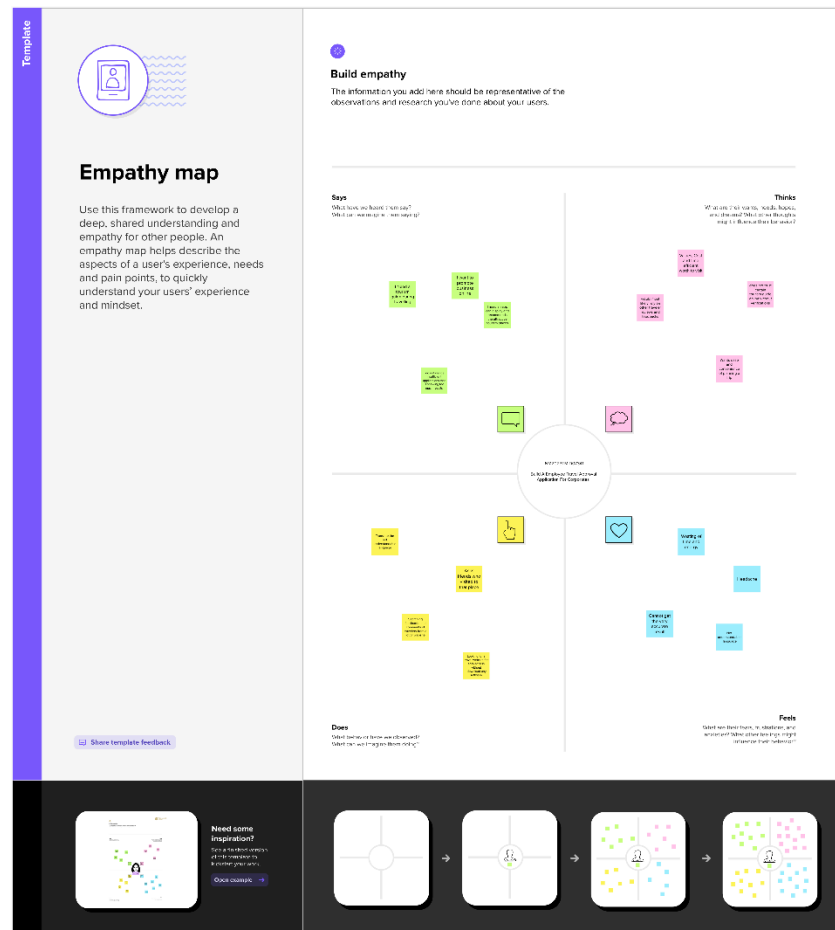


Figure 1 - Empathy map on EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

Ideation & Brainstorming Map

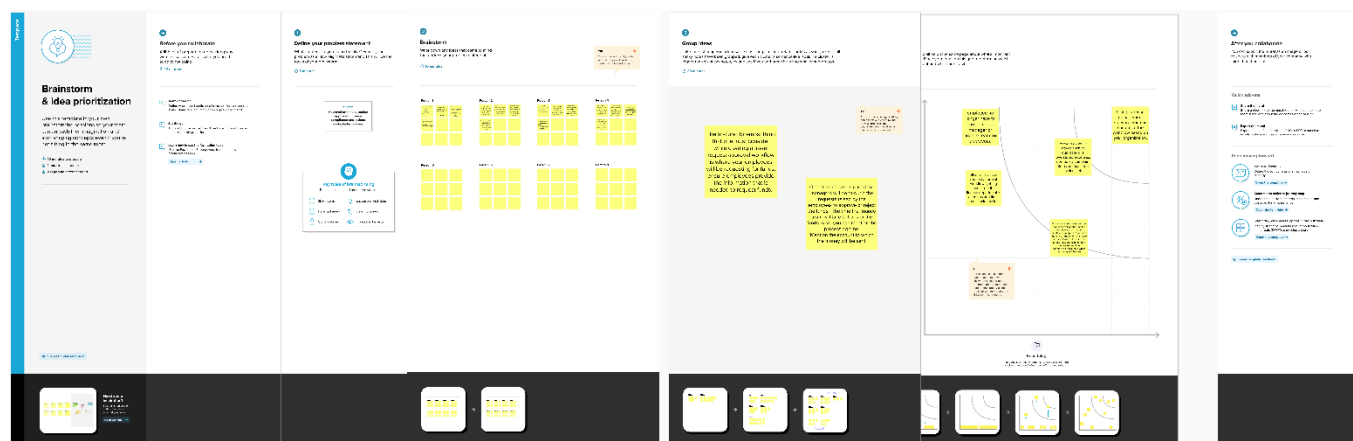
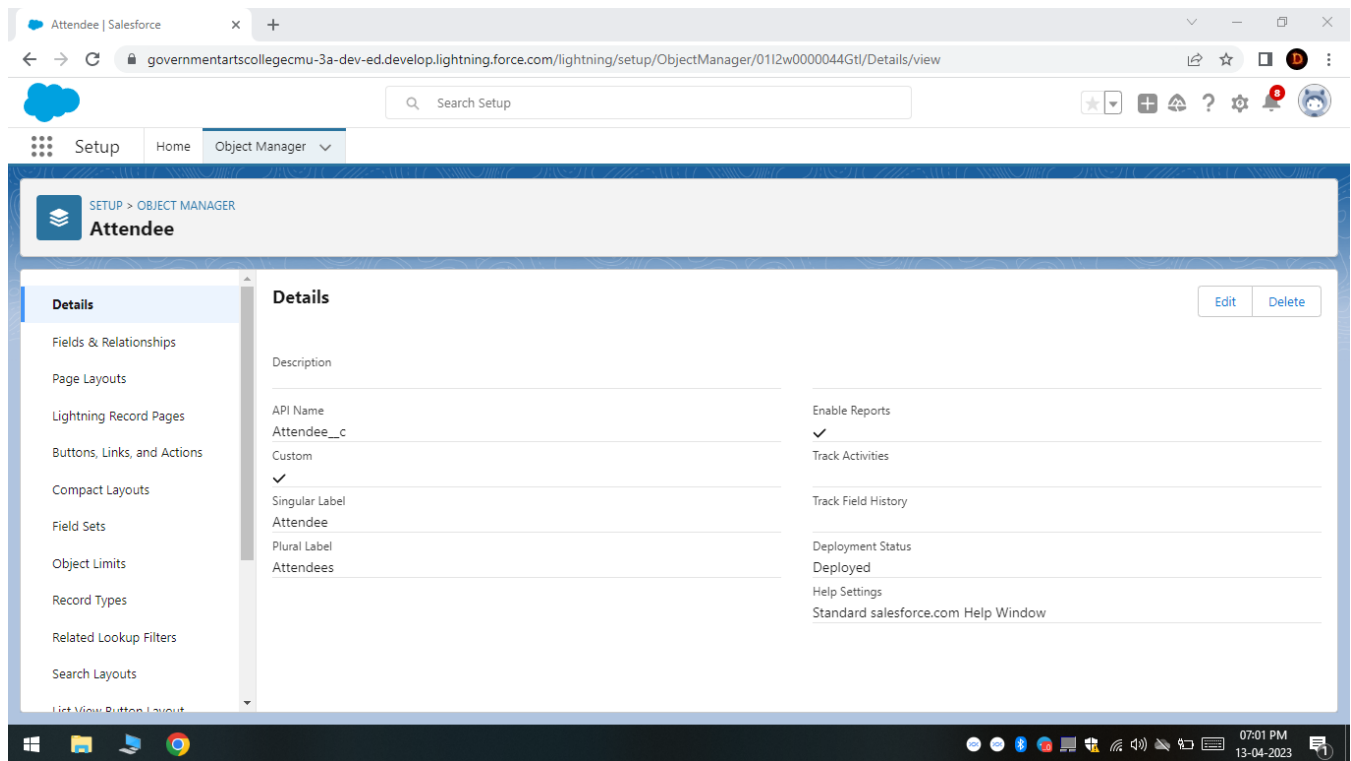


Figure 2 - Brainstorm map on EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

RESULT**Data Model:**

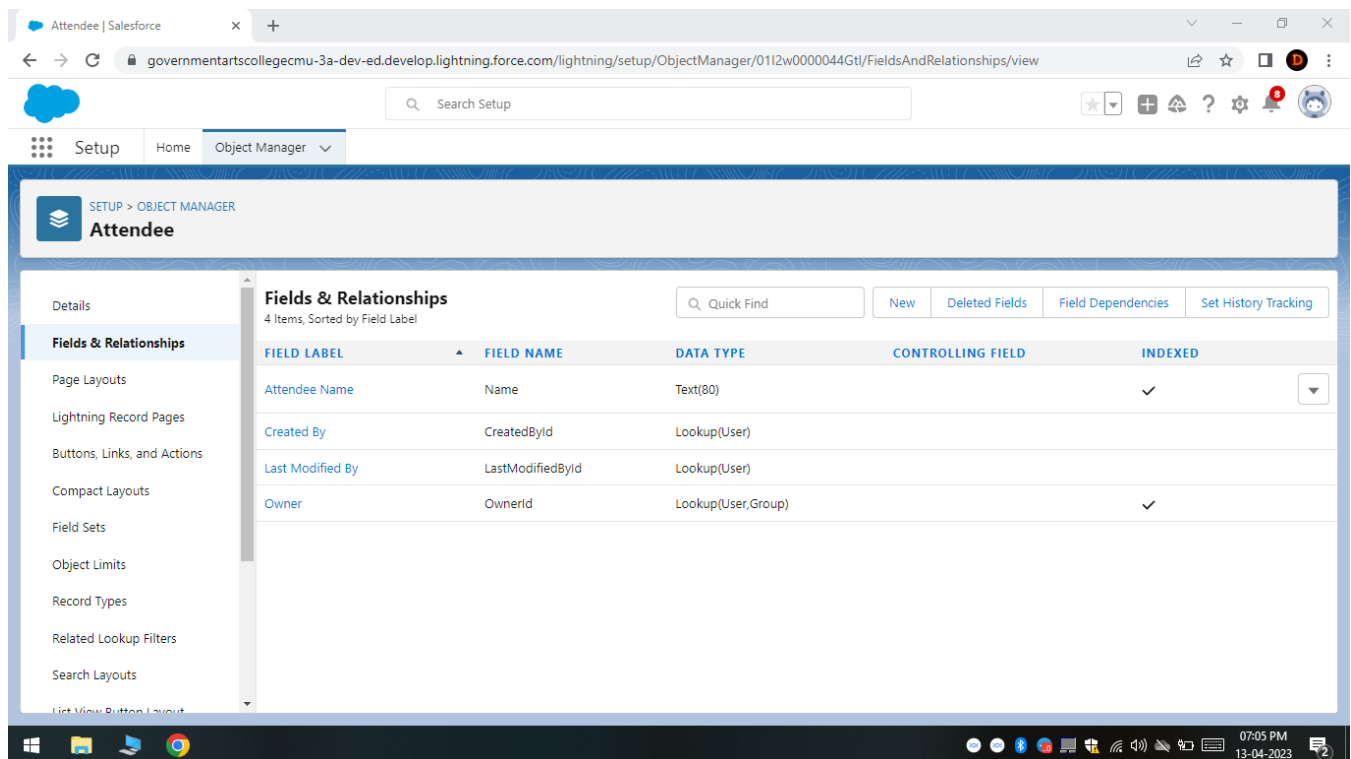
Object name	Fields in the Object	
Department	Field label	Data type
	Department	Text
Travel Approval	Field label	Data type
	Travel Approval	Auto Number
Expense Item	Field label	Data type
	Expense Item	Text

ACTIVITY & SCREENSHOTS



The screenshot shows the Salesforce Setup interface for the 'Attendee' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Details' and includes fields for Description, API Name (Attendee__c), Custom (checked), Singular Label (Attendee), Plural Label (Attendees), and various settings like Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are visible in the top right.

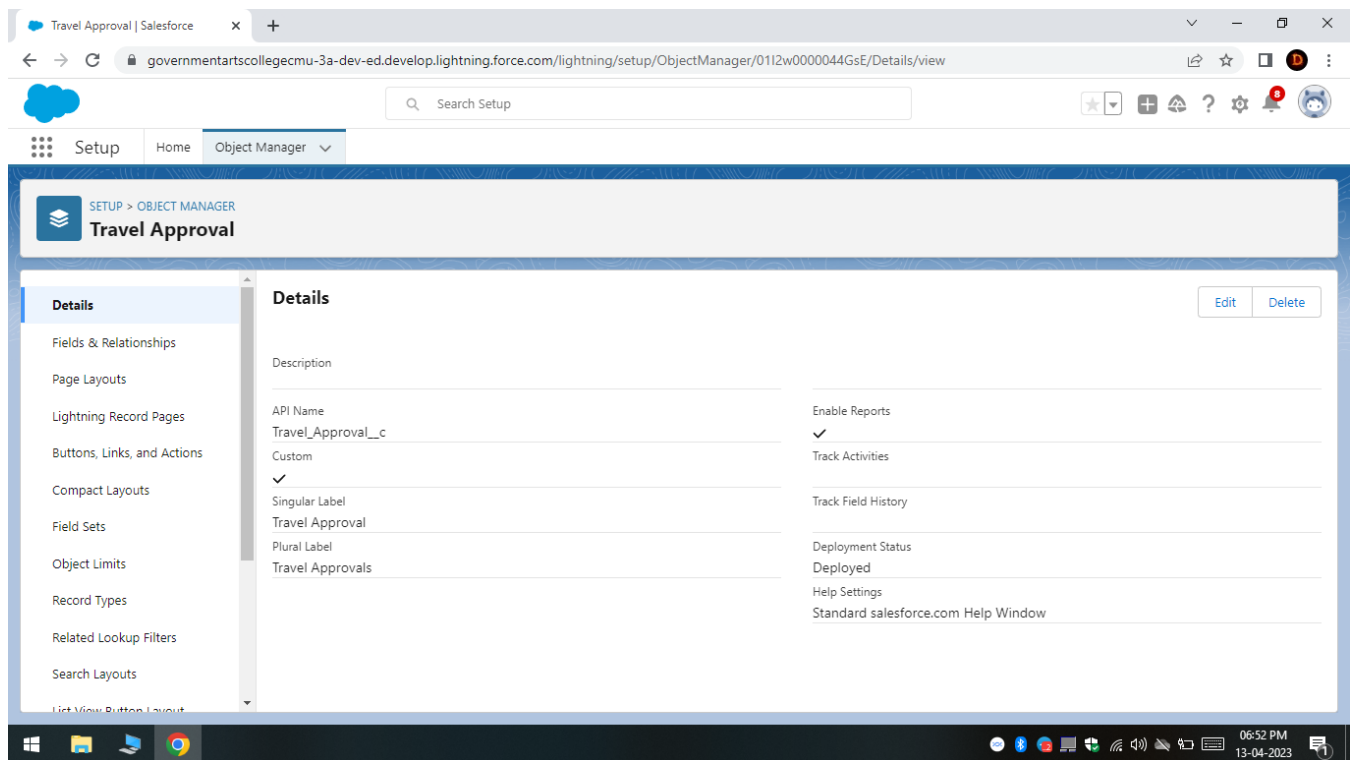
Figure 3 - the details of Object - Attendee



The screenshot shows the 'Fields & Relationships' section for the 'Attendee' object. It displays a table with 4 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are Attendee Name, Created By, Last Modified By, and Owner.

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

Figure 4 - the Details of Fields and Relationships of object - Attendee



The screenshot shows the Salesforce Object Manager interface for the 'Travel Approval' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Details' and shows various configuration options for the object, including API Name, Singular Label, Plural Label, and various checkboxes for reports and activities.

Details

API Name: Travel_Approval__c

Singular Label: Travel Approval

Plural Label: Travel Approvals

Enable Reports: ☒

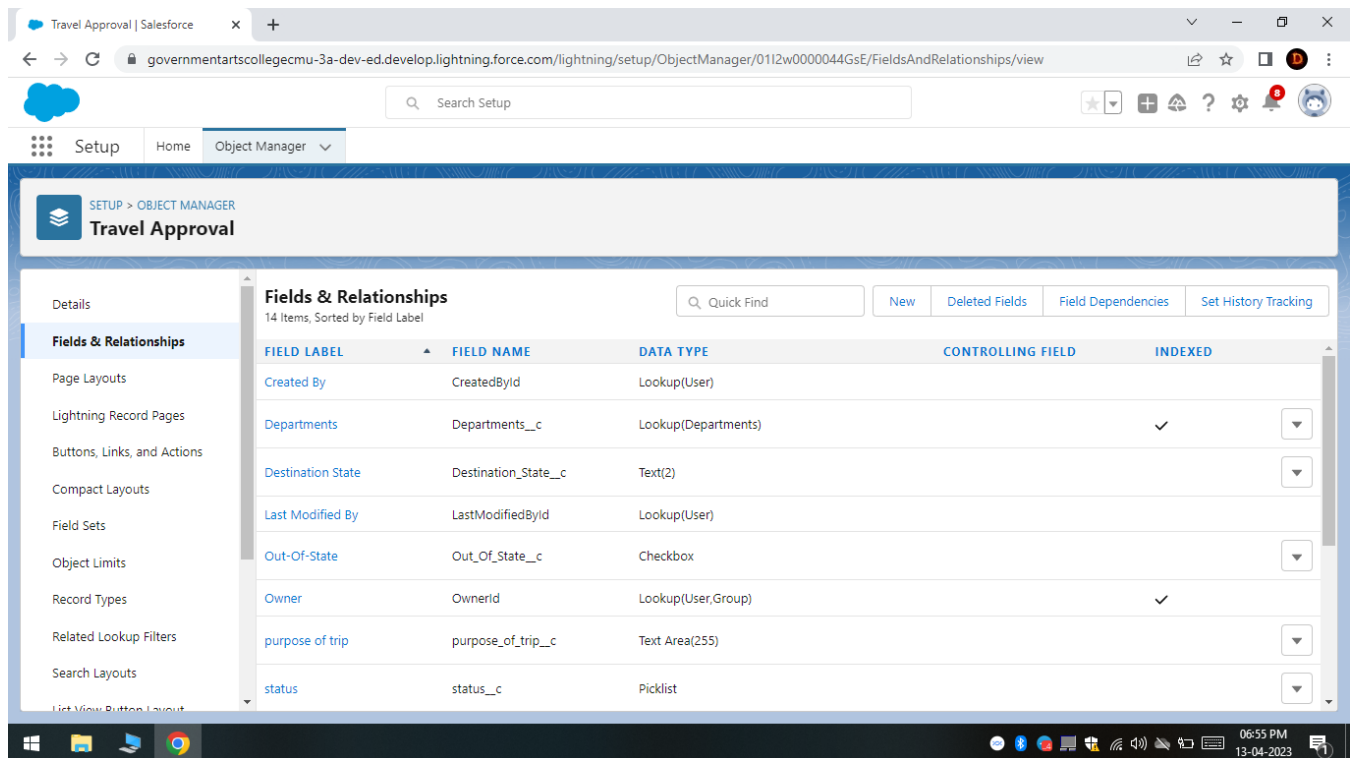
Track Activities: ☒

Track Field History: ☒

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Figure 5 - the Details of Object - Travel Approval



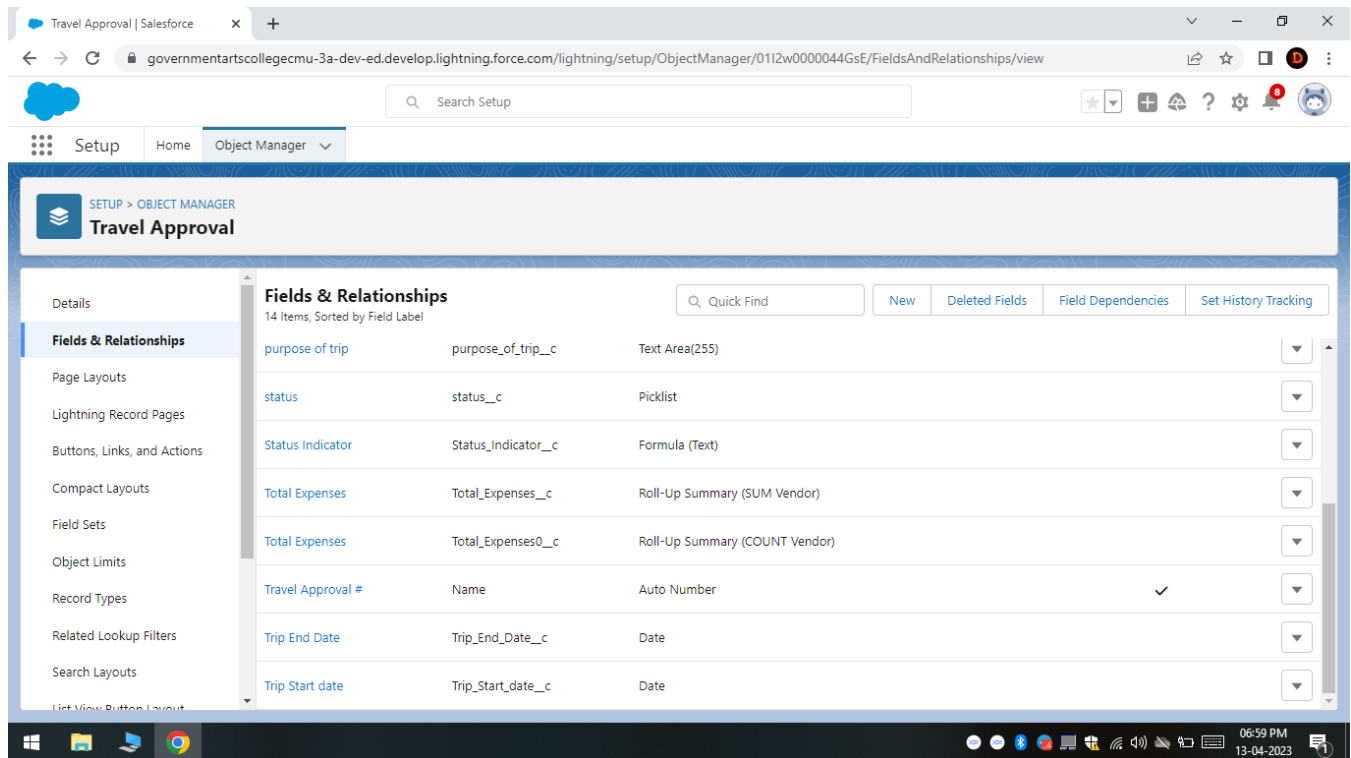
The screenshot shows the Salesforce Object Manager interface for the 'Travel Approval' object, specifically the 'Fields & Relationships' section. The left sidebar is the same as in Figure 5. The main content area displays a table of fields and their relationships, including field labels, names, data types, and whether they are indexed or controlled.

Fields & Relationships

14 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Departments	Departments__c	Lookup(Departments)		<input checked="" type="checkbox"/>
Destination State	Destination_State__c	Text(2)		<input checked="" type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		
Out-Of-State	Out_Of_State__c	Checkbox		<input checked="" type="checkbox"/>
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
purpose of trip	purpose_of_trip__c	Text Area(255)		<input checked="" type="checkbox"/>
status	status__c	Picklist		<input checked="" type="checkbox"/>

Figure 6 - the Details of Fields and Relationships of Departments

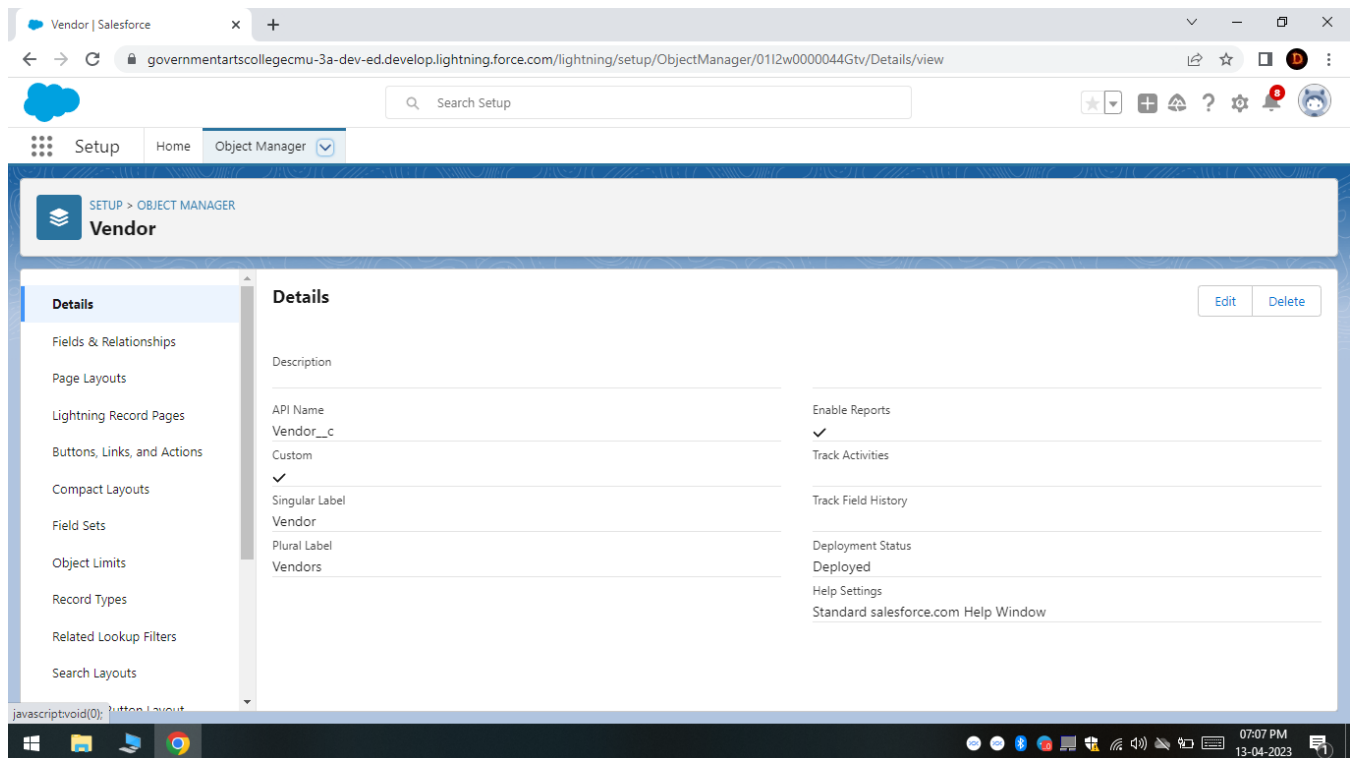


The screenshot shows the Salesforce Object Manager interface for the 'Travel Approval' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and displays a list of 14 items, sorted by Field Label. The items are as follows:

Field Label	Field Name	Field Type	Field Properties
purpose of trip	purpose_of_trip__c	Text Area(255)	
status	status__c	Picklist	
Status Indicator	Status_Indicator__c	Formula (Text)	
Total Expenses	Total_Expenses__c	Roll-Up Summary (SUM Vendor)	
Total Expenses	Total_Expenses0__c	Roll-Up Summary (COUNT Vendor)	
Travel Approval #	Name	Auto Number	✓
Trip End Date	Trip_End_Date__c	Date	
Trip Start date	Trip_Start_date__c	Date	

The top of the interface includes a search bar and navigation tabs: Setup, Home, and Object Manager. The bottom of the screen shows a Windows taskbar with various system icons and the date/time: 06:59 PM, 13-04-2023.

Figure 7 - the Details of Fields and Relationships of Object - Department (2)

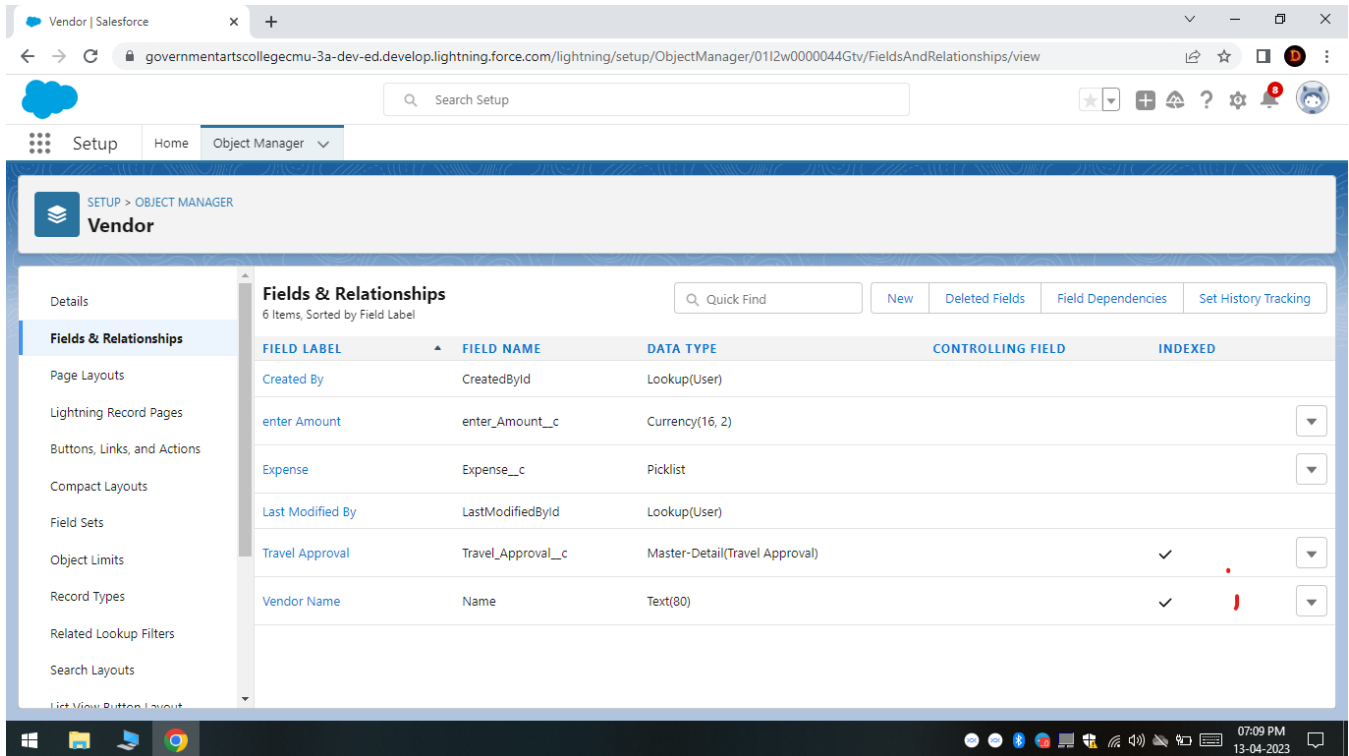


The screenshot shows the Salesforce Object Manager interface for the 'Vendor' object. The left sidebar contains a navigation menu with options: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and displays various configuration options for the object. The options are as follows:

Field Label	Field Name	Field Type	Field Properties
Description			
API Name	Vendor__c		
Custom	✓		
Singular Label	Vendor		
Plural Label	Vendors		
Enable Reports	✓		
Track Activities			
Track Field History			
Deployment Status	Deployed		
Help Settings	Standard salesforce.com Help Window		

The top of the interface includes a search bar and navigation tabs: Setup, Home, and Object Manager. The bottom of the screen shows a Windows taskbar with various system icons and the date/time: 07:07 PM, 13-04-2023.

Figure 8 - the Details of Object - Vendor



Vendor | Salesforce

governmentartscollegedcmu-3a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000044Gtv/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Vendor

Details

Fields & Relationships

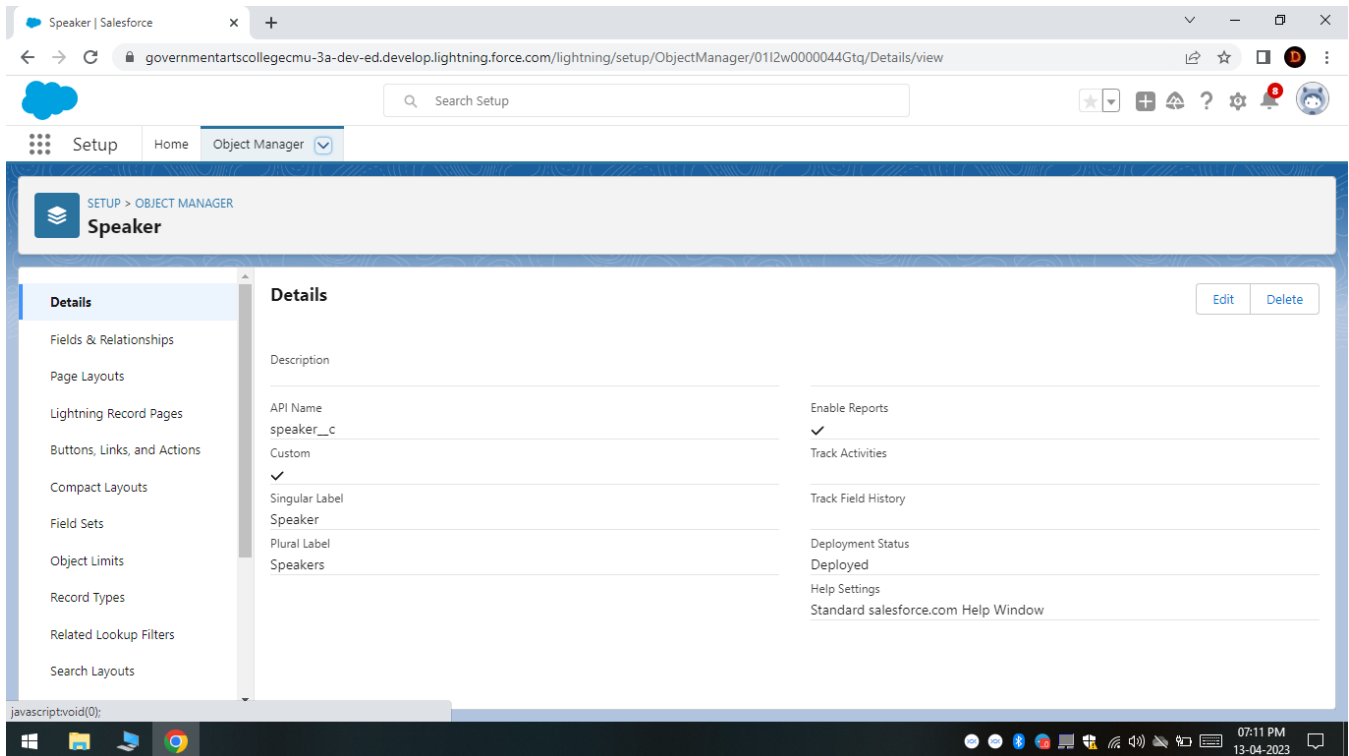
6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
enter Amount	enter_Amount__c	Currency(16, 2)		
Expense	Expense__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Travel Approval	Travel_Approval__c	Master-Detail(Travel Approval)		✓
Vendor Name	Name	Text(80)		✓

07:09 PM 13-04-2023

Figure 9 - the Details of Fields and Relationships of Object - Travel Approval



Speaker | Salesforce

governmentartscollegedcmu-3a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000044Gtg/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Speaker

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

Details

Edit Delete

Description

API Name

speaker__c

Custom

✓

Singular Label

Speaker

Plural Label

Speakers

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

javascript:void(0);

07:11 PM 13-04-2023

Figure 10 - the Details of Object - Speaker

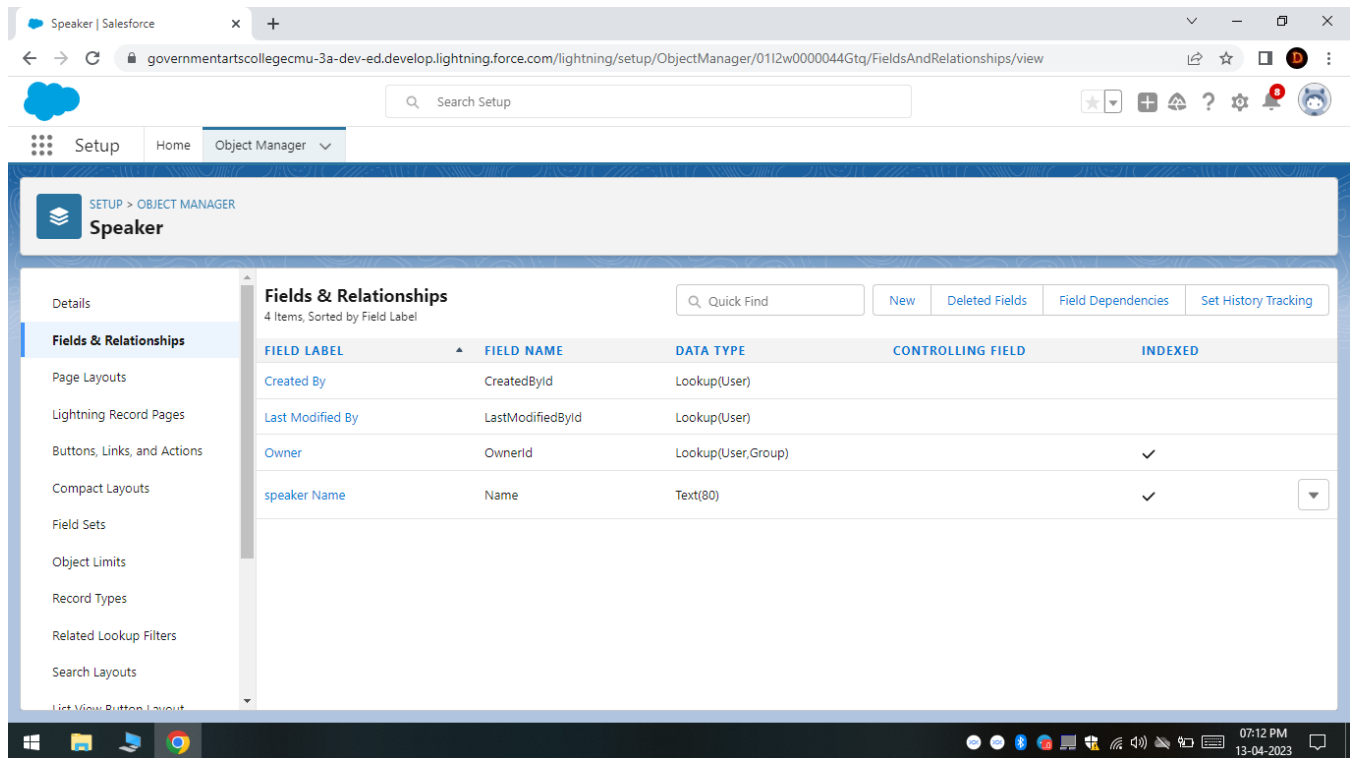


Figure 11 - the Details of Fields and Relationships of Object - Speaker

TRAILHEAD PROFILE PUBLIC URL

Team Lead	-	https://trailblazer.me/id/dinesh192002
Team Member 1	-	https://trailblazer.me/id/kalaivani12
Team Member 2	-	https://trailblazer.me/id/karasan9
Team Member 3	-	https://trailblazer.me/id/keerd14

ADVANTAGES & DISADVANTAGES

Advantages

Approvals on time

Your employee no longer have to run behind a manager or finance team for approvers

Customize Approval Workflow

Using expense management software you can customize the workflow based on your Organisation.

Increase compliance and reduce costs

Now present expense frauds such as duplicate bills, complains dems etc

Faster process

Most expense management software comes with mobile capabilities.

Disadvantages

- Business travels are expensive because companies spend a lot of money on it.
- Not only the plane ticket, but companies also provided hotel costs, transportation costs, and food services to their employees.
- Lack of productivity - Traveling sometimes needs help managing the time for meetings. Because of this, it has an impact on the growth of the Organisation.

APPLICATIONS

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 primary purpose of business travel is to develop new ideas about business operations. On the other hand, the disadvantage of business travel is that it enhances the organization's expense. So it may affect the growth of the organization.

FUTURE SCOPE

With automated approvals, managers can spend more time on strategy and other essential tasks rather than bogged down analyzing travel approval requests. Online booking systems can also assist companies with gaining more accurate estimated costs for business trips and streamline the reimbursement of travelers' expenses.

Powerful AI can organize search results to offer travelers fully compliant suggestions and automatically approve these itineraries