

PROJECT REPORT TEMPLATE

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

1.2 Purpose

This Project helps in sending your travel approval requests to your manager in place of emails.

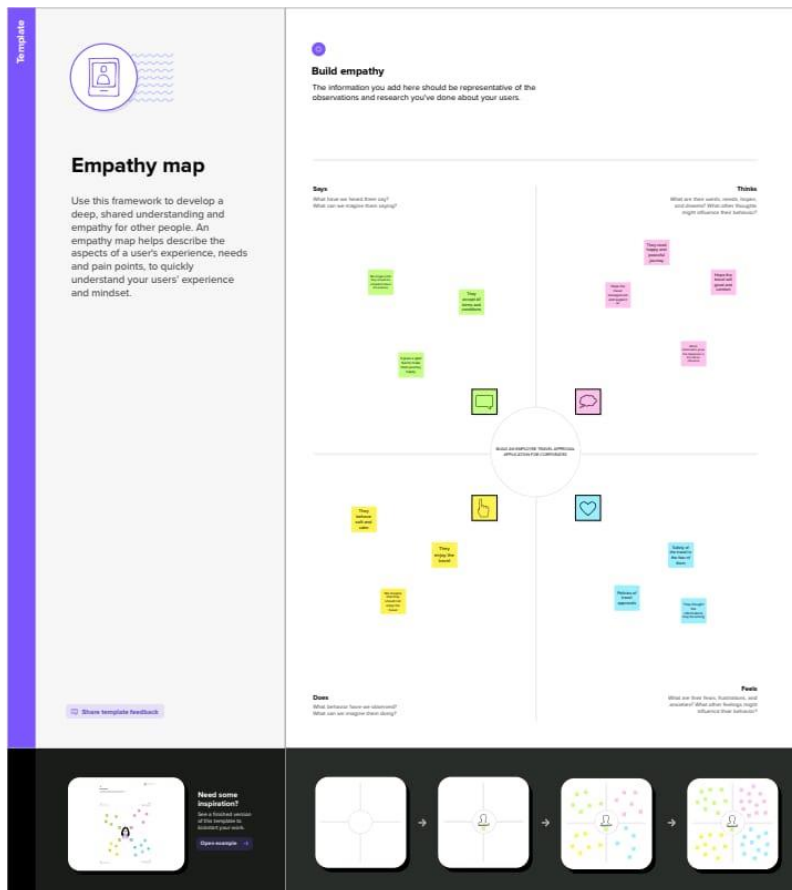
- Real Time Sales force Project
- Object & Relationship in Sales force

2. Problem Definition & Design Thinking

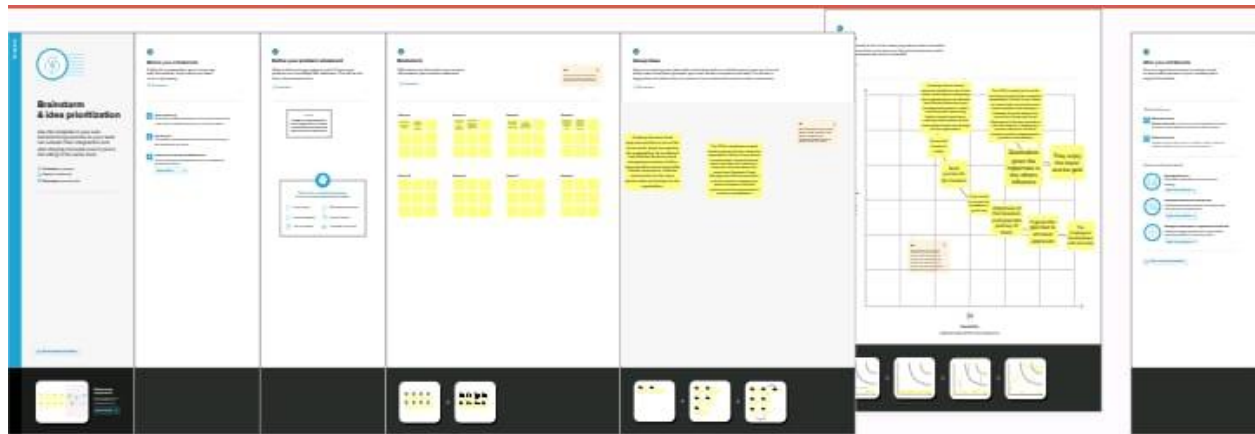
Sales force is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Sales force has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

2.1 Empathy Map



2.2 Ideation & Brainstroming Map



3 Result

3.1 Data Model

Object Name	Fields in the Object	
	Field label	Data type
Travel Approvals	Travel Approval Field	Master-Detail Relationship
Attendees	Purpose of Trip	Text Area
Departments	Amount	Currency
Expense Items	Expense Type Field	Pick list
Speakers	Trip Start Date	Date
Vendors	Destination State	Text Area

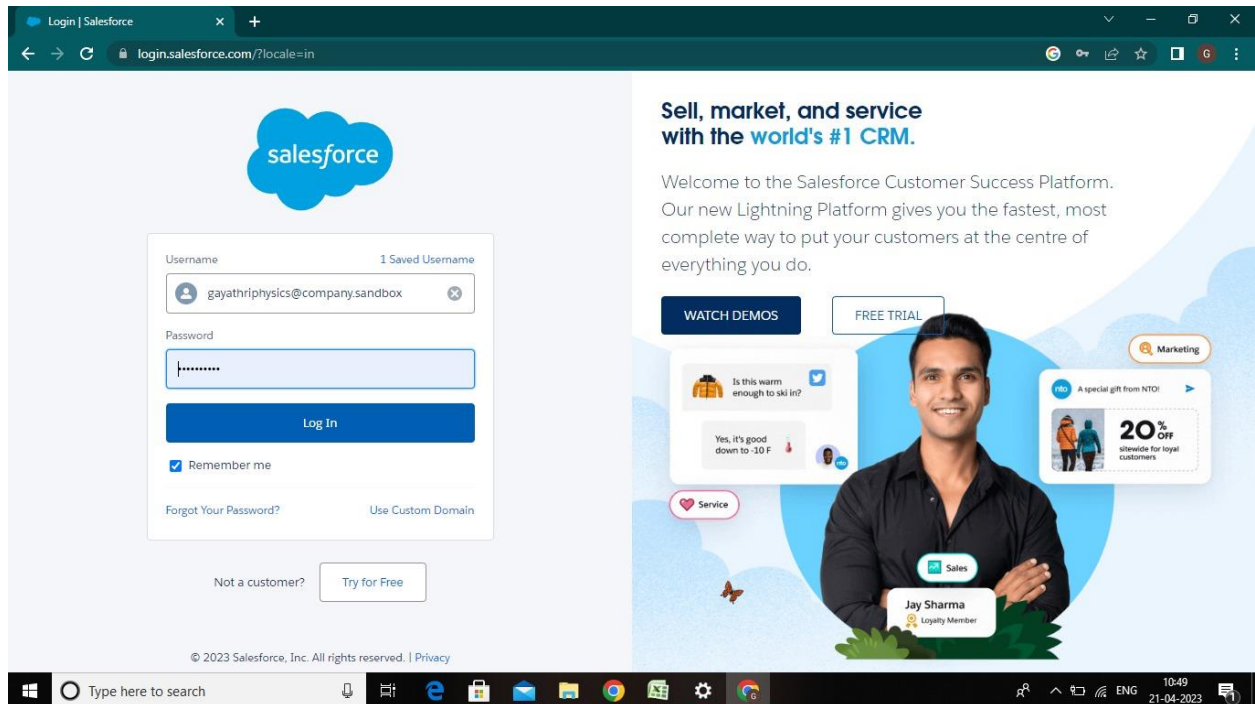
3.2 Activity & Screenshot

Create Sales force Org

1. Creating Developer Account

- Go to developers.salesforce.com/
- Click on sign up.
- On the sign-up form, enter the following details.

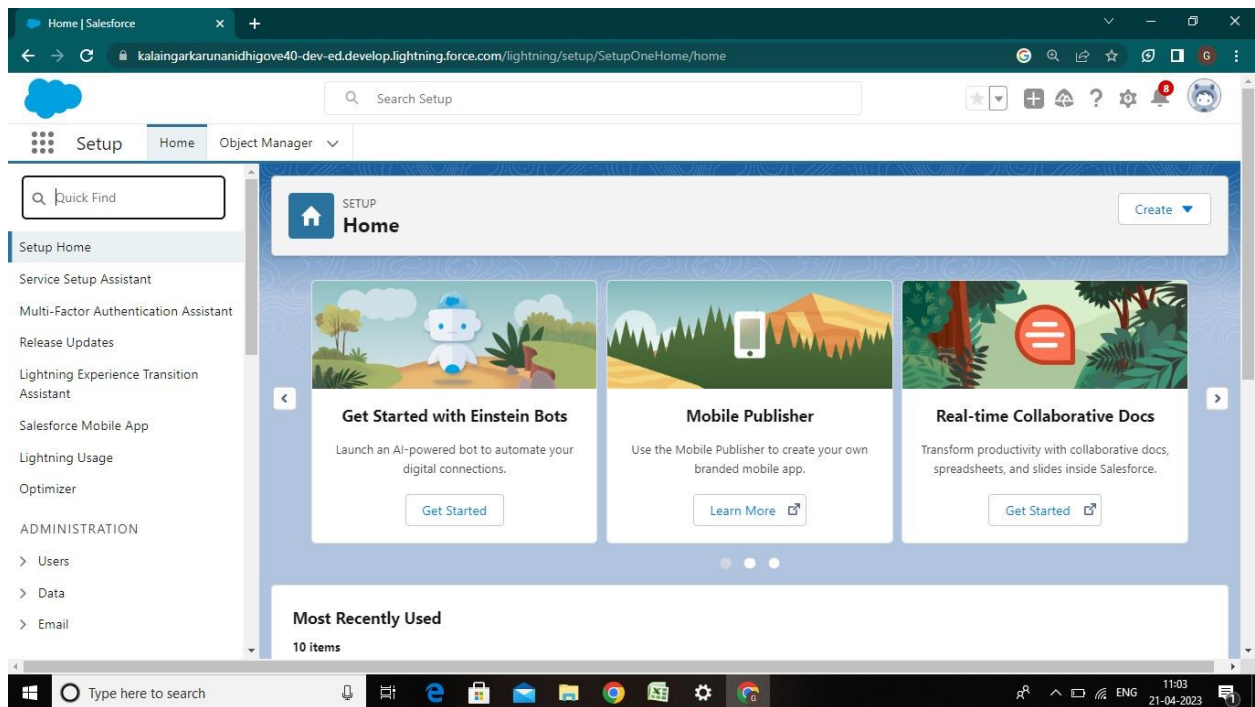
Click on sign up after filling the details and creating a developer org in sales force.



2. Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10 minutes, as login to your sales force account.

- Go to salesforce.com and click on login.
- Enter the username and password that you just created.
- After login this is the home page which you will see.

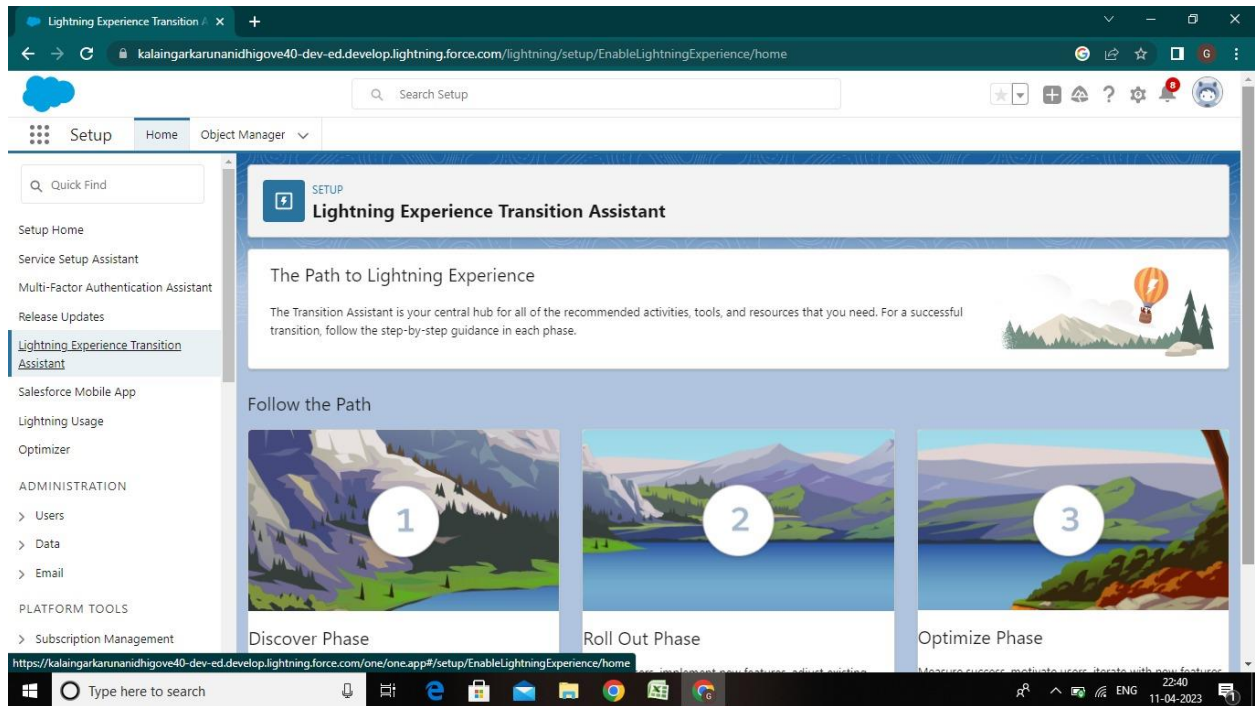


Creating the Application

Create the Travel Application

- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter Travel Approval as the App Name, then click Next.
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Department, Travel Approval, Expense Item, Reports, and Dashboards and move them to Selected Items. Click Next.

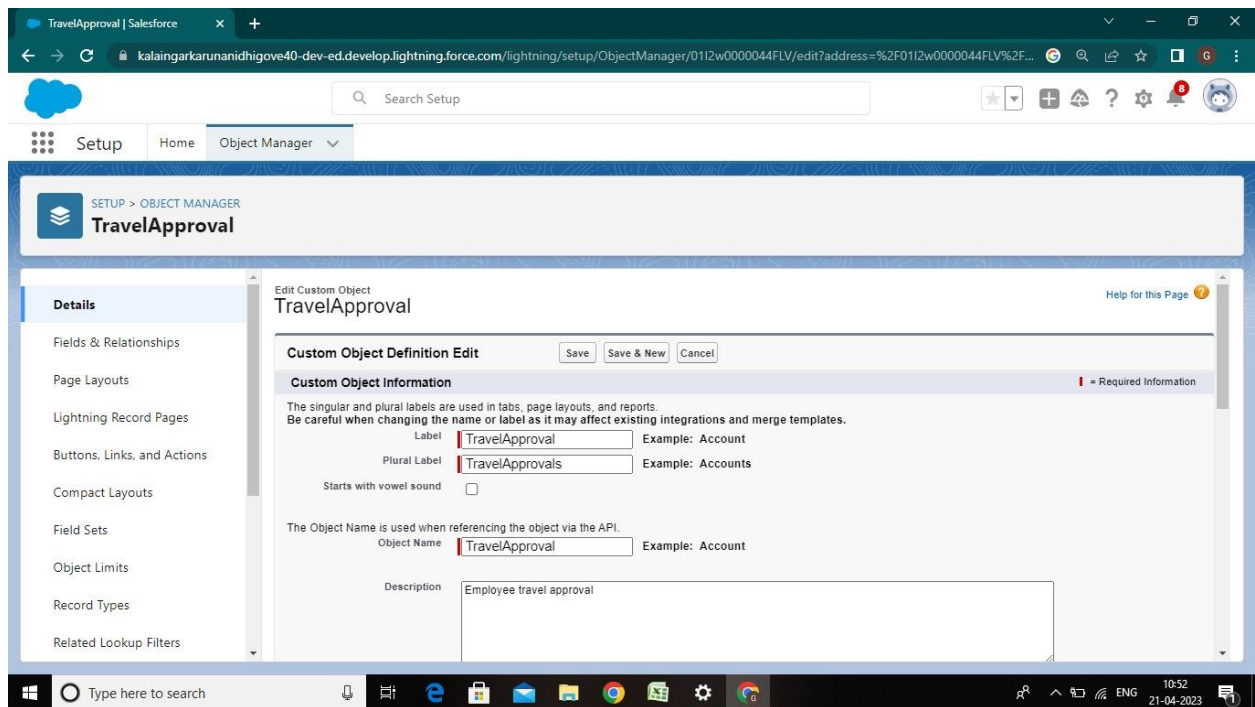
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- To verify your changes, click the App Launcher, type Travel Approval and select the Travel Application app.



What is an object?

1. Custom Object Creation

- After you login to your org, click create on the right side of the page and select custom object.
- From the setup page – Click on Object Manager – Click on Create – Click on Custom Object.
- Enter the label name, plural label name, click on Allow reports, Allow search – Save.



2. Create 3 custom objects and tabs

- a) Department
- b) Travel Approval
- c) Expense Item

Create Department Object

- From Setup, click Object Manager.
- Click Create, then select Custom Object.
- Give the name as Department.
- Click on gear icon – click setup.
- From the setup page – Click on Object Manager – Click on Create – Click on Custom Object.

- Enter the label name, plural label name, click on Allow reports, Allow search – Save.
- Now the tabs section opens, add this tab to the travel app.

Create Travel Approval Object

- Navigate back to Object Manager.
- Click Create then select Custom Object.
- Enter the details.
- Allow Reports, search, and launch a new tab and add this tab to the travel app.

The screenshot displays the Salesforce Object Manager interface for creating a validation rule. The breadcrumb trail is 'SETUP > OBJECT MANAGER > TravelApproval'. The left sidebar lists various configuration options. The main content area is titled 'Validation Rules' and includes a 'Check Syntax' button. A function selector is set to 'ASIN'. The 'Error Message' section contains the text 'trip end date 30'. Below this, the 'Error Location' is configured to 'Field' with the 'Owner' field selected. The bottom of the page features 'Save', 'Save & New', and 'Cancel' buttons.

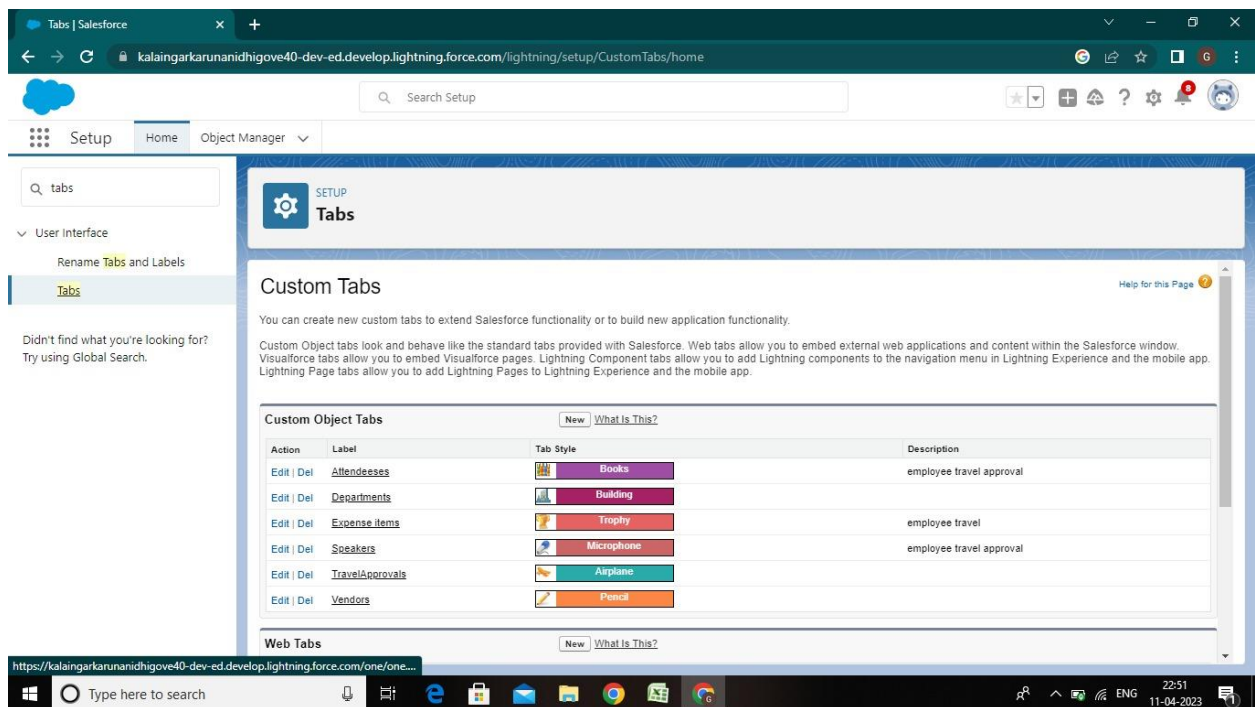
Tab

Create a custom tab

Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.

Under Custom Object Tabs, click New.

- For Object, select Event.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next and Save.
- In the same way create other objects such as Attendees, Speaker and Vendor.



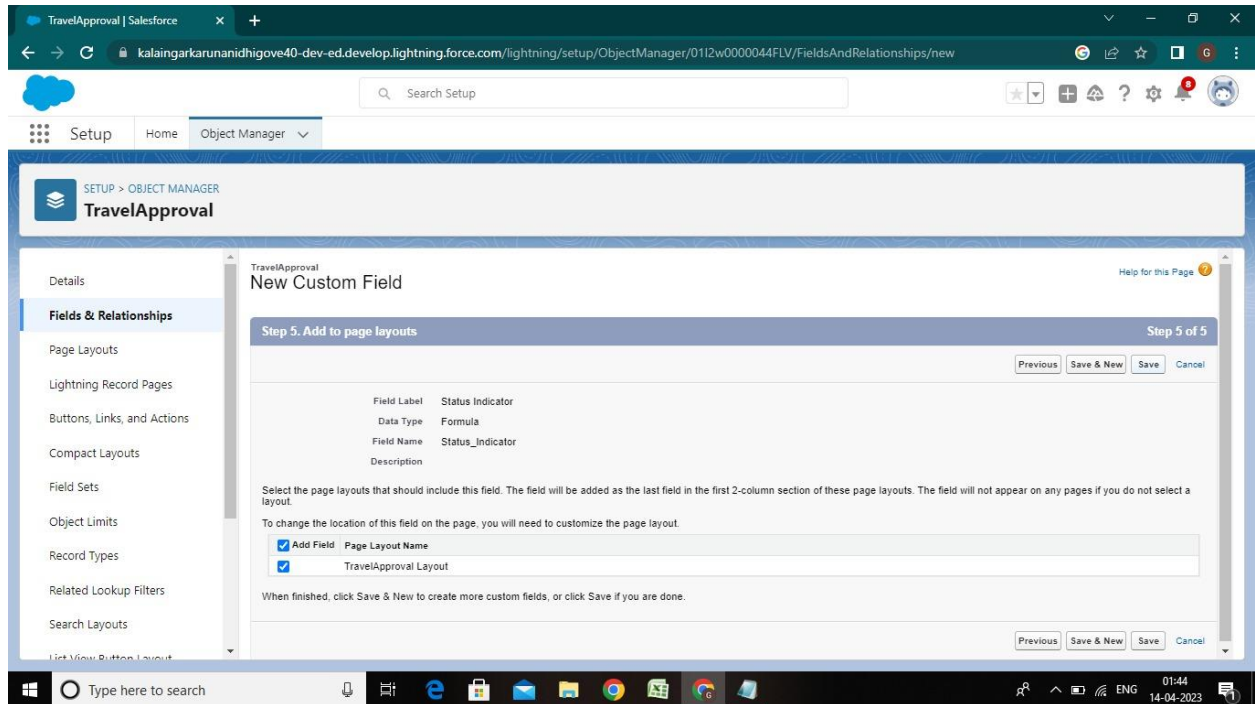
CREATE- FIELDS & RELATIONSHIPS

1. Click Fields & Relationships

- Click Fields & Relationships, and click New.
- For data type, select Currency.
- Enter the given details.

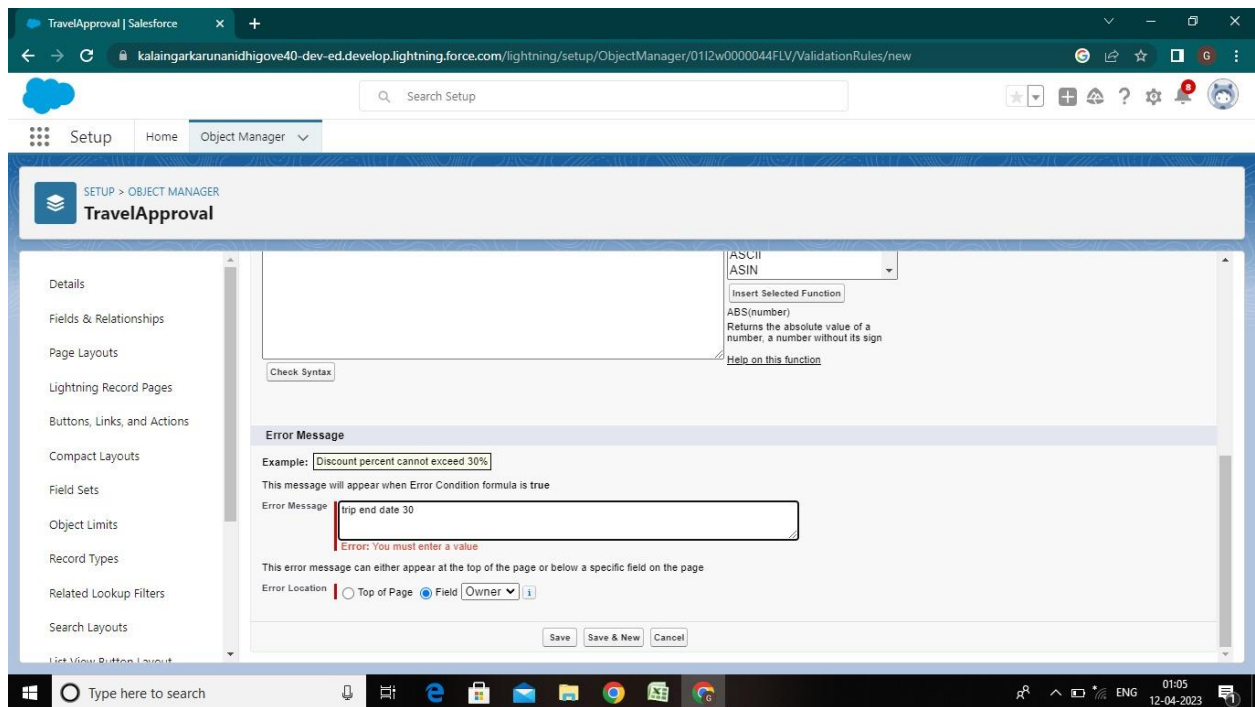
- For Field Label, enter Amount
- For Length, enter 16
- For Decimal places, enter 2
- Select Required

➤ Click Next, Next, then Save & New.



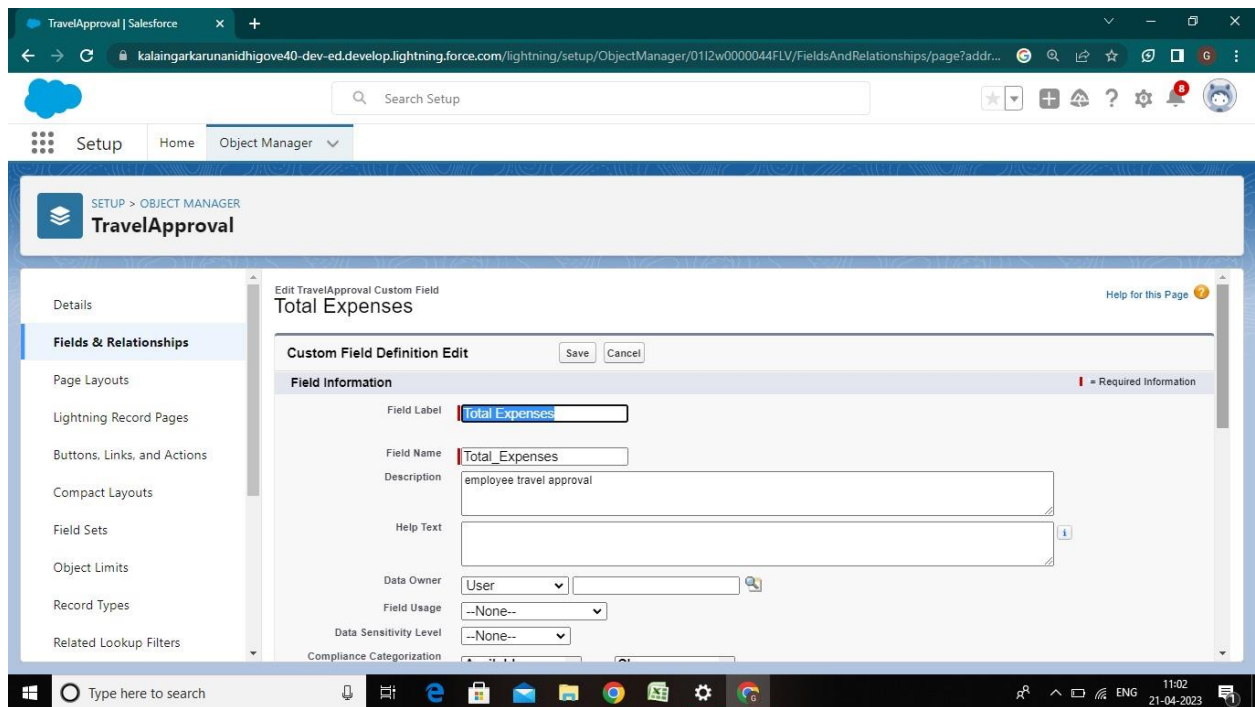
2. Create the Expense Type field

- Select Pick list as the data type.
- Select Enter values, with each value separated by a new line.
- Add these values: (Airfare, Hotel, Rentalcars, Meals, Others)
- Select Required.
- Click Next, Next, then Save & New.



3. Create the Travel Approval field

- Select Master-Detail Relationship data type, click Next.
- Select Travel Approval from the Related to menu.
- Click Next four times, then click Save.



IMPORT DEPARTMENTS

Import Departments

From Setup, click the Home tab.

- In the Quick Find box, enter Data Import and select Data Import Wizard.
- Click Launch Wizard!

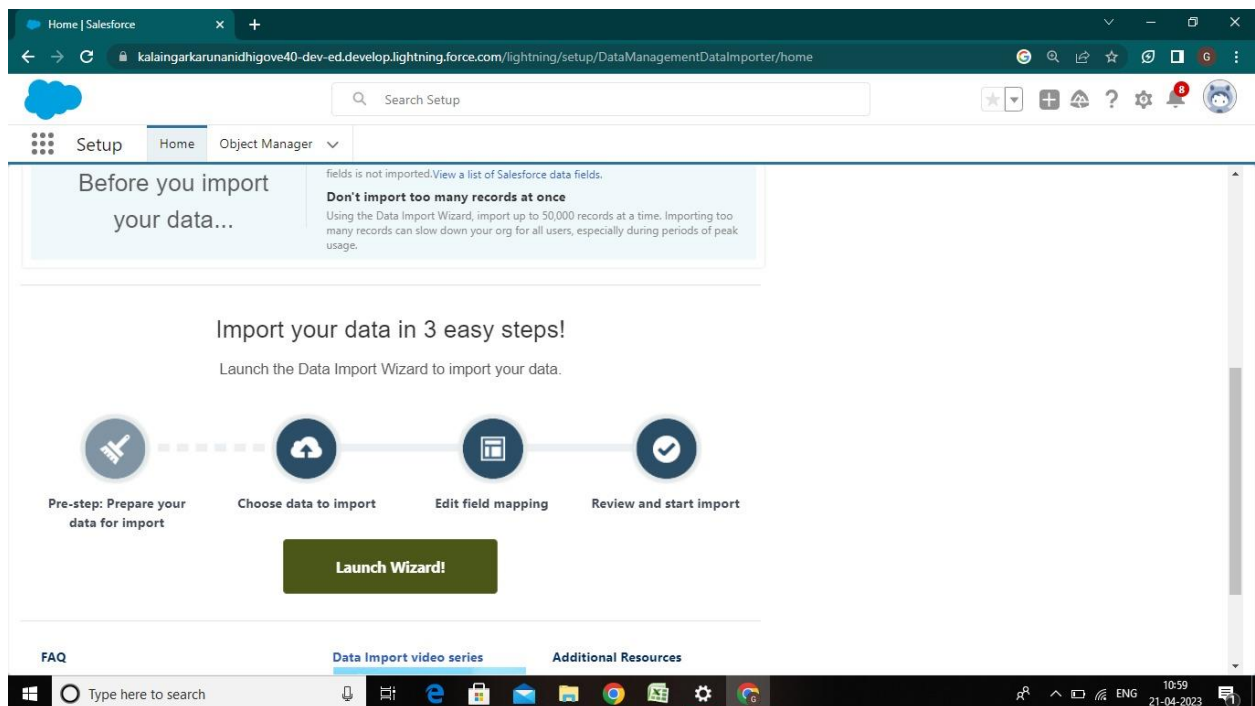
Click the Custom Objects tab and select the Departments object.

- Next, select Add new records.
- Drag and drop the Departments. CSV file you downloaded using zip files or click the CSV icon and browse to select your file. Select Next.

➤ Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Sales force Object), the fields are automatically mapped. Click Next.

➤ The next screen gives you a summary of your data import. Click Start Import.

➤ This takes you to the bulk import summary window that shows that the process has completed and 16 records have been successfully imported or processed. You'll also get an email notification confirming the import.

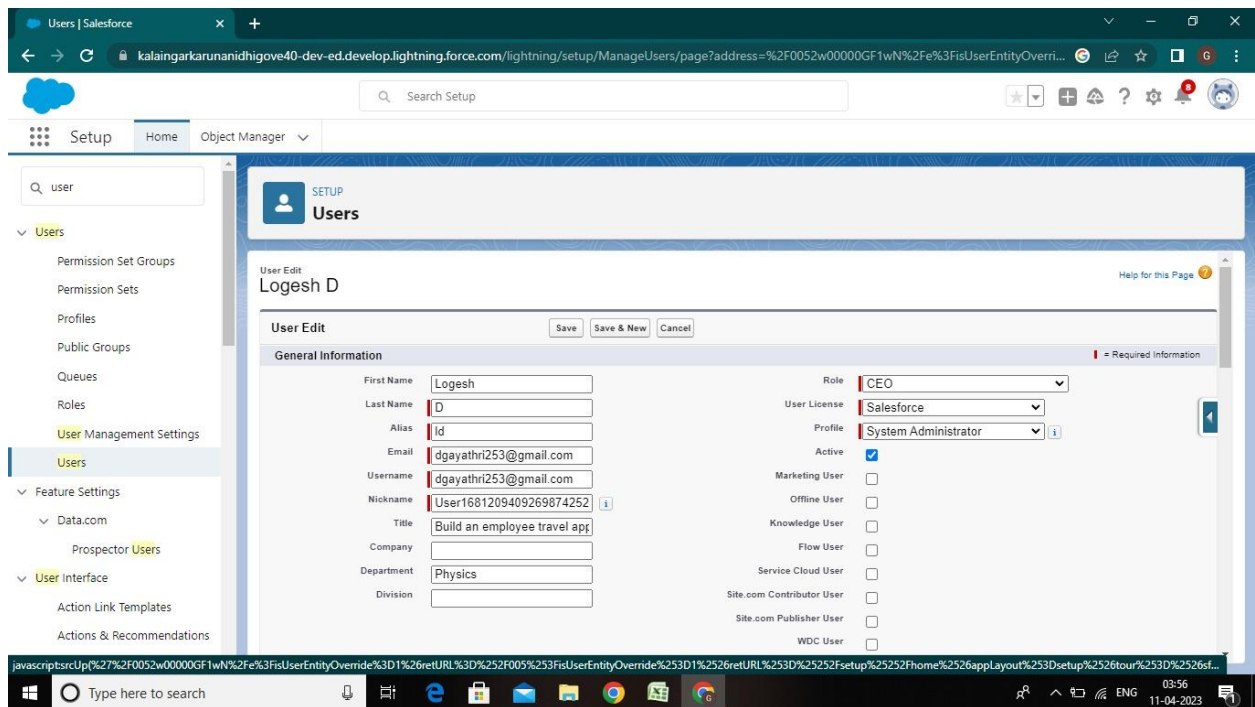


CUSTOMIZE USER INTERFACE

Create User and Setup Approvals

In this Milestone we are going to setup the users, customizing the page layouts.

- Enter users in the quick find box and select users.
- Click new user.
- Now give the name as you wish but the email must be real email address.
- For username field follow the instructions.
 - Firstname.<yourlastname>@<yourcompany>.com
 -or create a username of your choice that should be unique.
- Give the role as CEO, Profile as System Administrator and license as Sales force.
- From Setup, enter Users in the Quick Find box and select Users.
- Select your user account in the list provided. (Click on your name in the All Users list.)
- Click Edit.
- Scroll down to Approver Settings. Set your manager as the user you have created recently.
- Click Save.



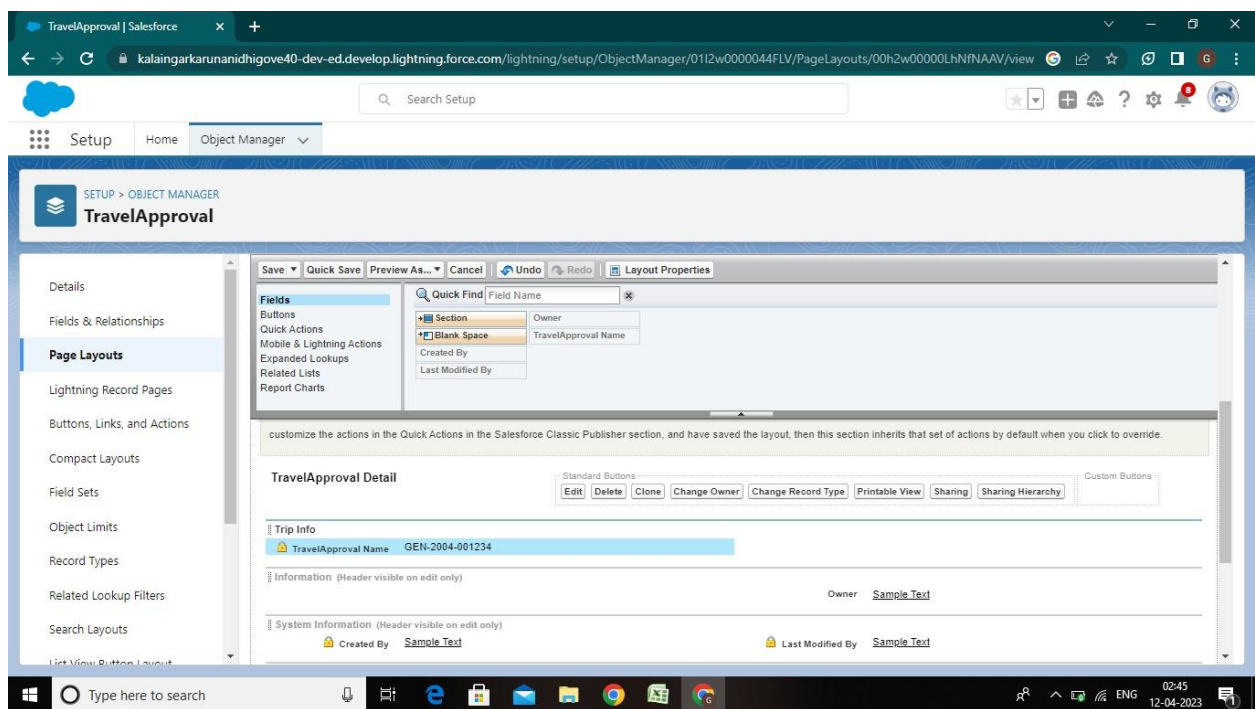
USE CUSTOMIZATION

Customize Travel Approval Object Page layout

- From the Object Manager, search for the travel approval object and click on page layouts and click edit.
- Drag Section from the top pane to the lower pane directly below the Information section. When dragging over the page, you get a visual indicator of where you can drop the new section.
- Name the section Trip Info, leave the rest of the settings at their default values, then click OK.
- Drag the Purpose of Trip field from the Information section to the Trip Info section.
- Drag Trip Start Date and Trip End Date from the top pane into the left-hand column of the Trip Info Section.

- Drag Out-of-State and Destination State from the top pane into the right-hand column of the Trip Info Section.
- Drag the Department field from the left-hand column of the Trip Info section to the right-hand column.
- Click Save.

Note: You may need to refresh your browser screen for the changes to show up.

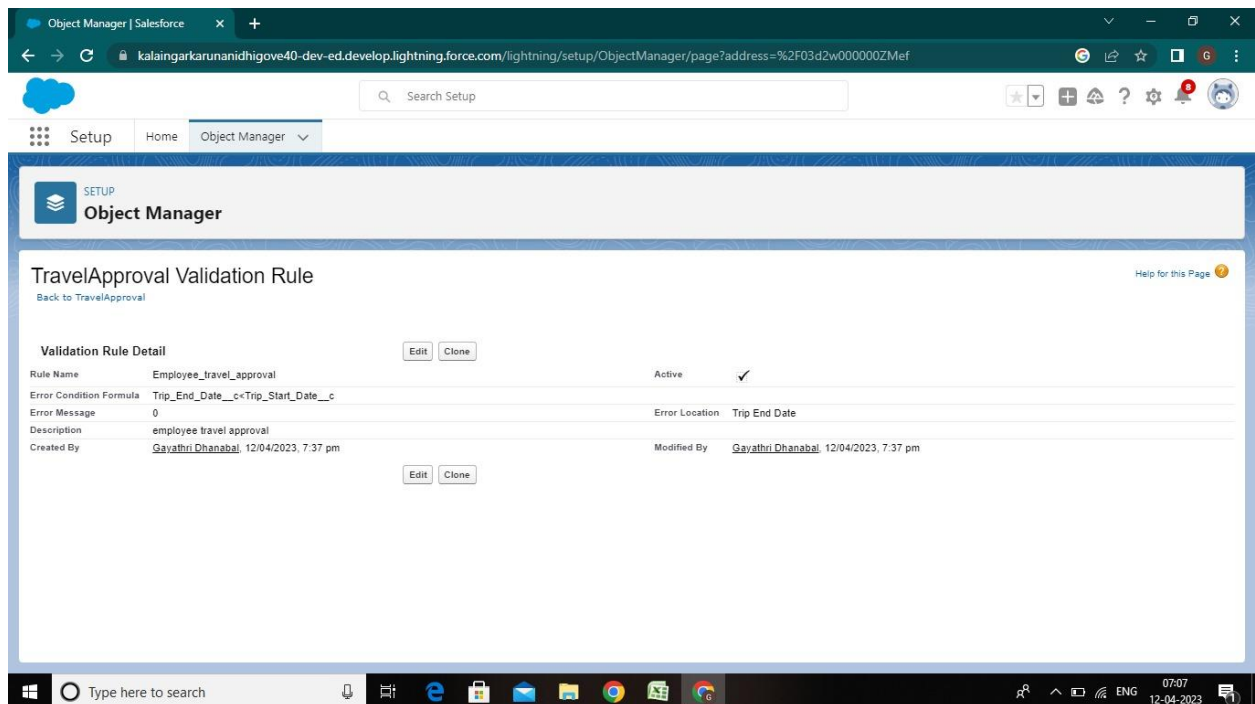


ADD BUSINESS LOGIC TO TRAVEL APPROVAL

1. Create Validation Rule

- Search for the travel approval object from the object manager and open the object.

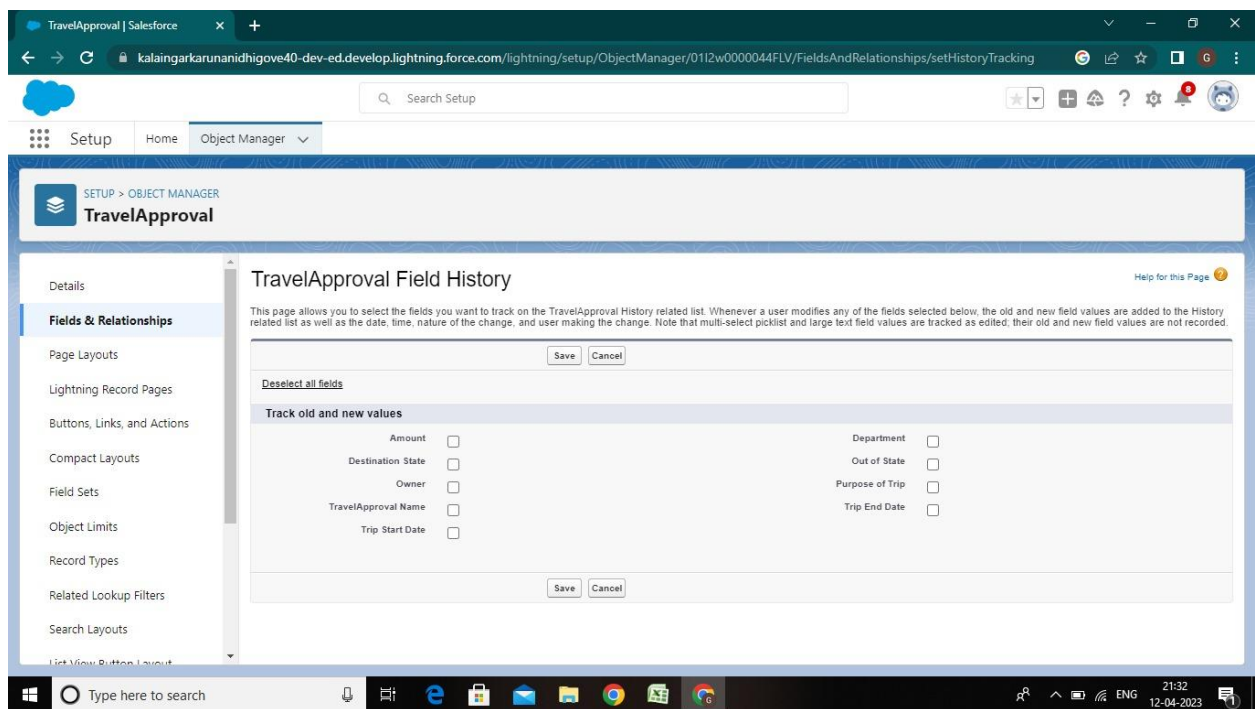
- Click on validation rules and give your rule a name and make sure that the rule is set to active.
- In the error condition formula enter `Trip_End_Date__c < Trip_Start_Date__c`.
- For error location select field and pick trip and pick trip end date as the location for error.



2. Create Rollup Summary Fields

- From the Travel Approval object, select Fields & Relationships.
- Click New.
- Select the Roll-up Summary data type.
- Click Next.
- Enter the following values for the field details
 - Field Label: Total Expenses

- Field Name: Total_Expenses (this automatically gets set when you tab out of the Field Label field)
- Click Next.
- Configure the roll-up calculation.
- Summarized Object: Expense Items
 - Roll-Up Type: SUM
 - Field to Aggregate: Amount
 - Filter Criteria: All records should be included in the calculation
- Click Next, Next, Save.



3. Create Formula Fields

- First, we need to upload a zip file to your Sales force environment that contains all the images we use. You should have a file titled StatusImages.zip.
- Click the Home tab to navigate back to the main setup page.

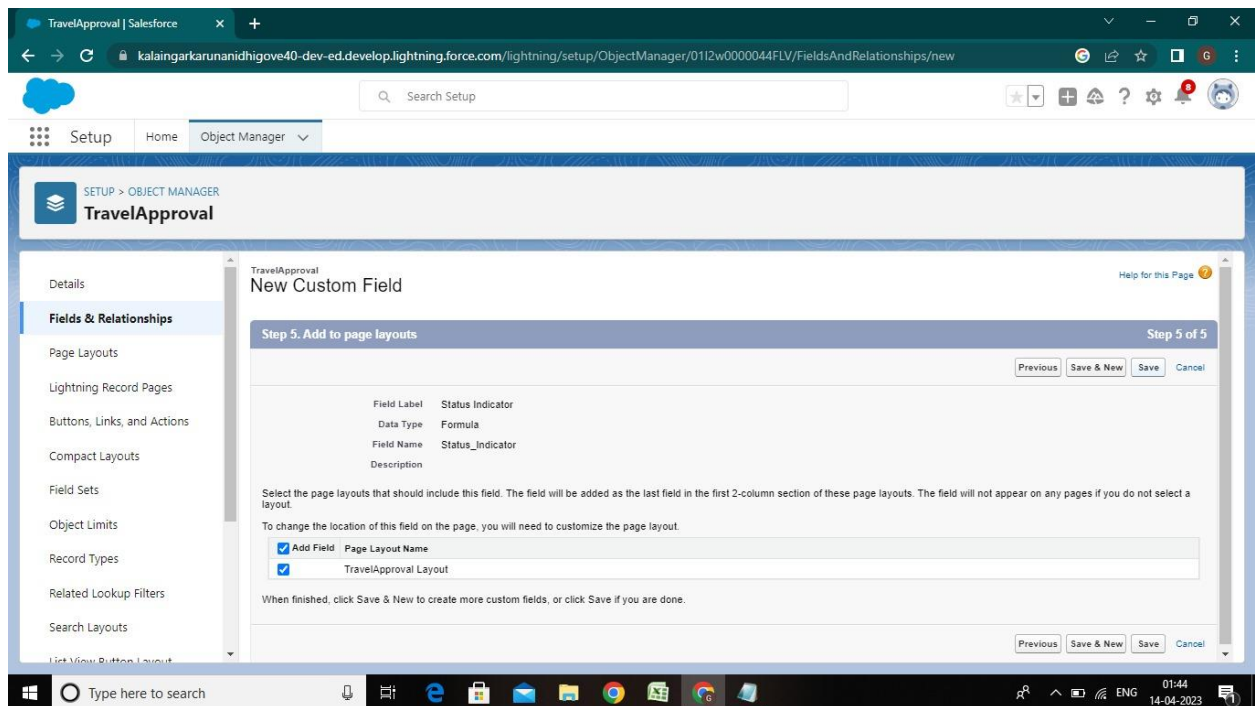
- Click Custom Code | Static Resources (or enter Static in the Quick Find to filter down the options).
- Click New.
- Enter the following values for your static resource.

Parameter	Value
Name	StatusImages
File	StatusImages.zip
Cache Control	Private

- Now select the travel approval object.
- Select Fields & Relationships.
- Click New.
- Select Formula data type.
- Click Next.
- Enter the following values.
 - Field Label: Status Indicator
 - Field Name: Status_Indicator (This automatically gets sent when you tab out of the Field Label field)
 - Formula Return Type: Text
- Click Next.
- Copy and paste the following formula into the formula editor.
 - If (ISPICKVAL (Status__c, 'Approved'), IMAGE ("/resource/StatusImages/thumbs-up.png", Accepted", 20, 20),

- IF (ISPICKVAL (Status__c, 'Rejected'), IMAGE(“/resource/StatusImages/thumbs-down.png”, ”Rejected”, 20,20), IMAGE(“/resource/StatusImages/draft.png”, ”In-Process”, 20,20)))

➤ Click Next, Next, Save.

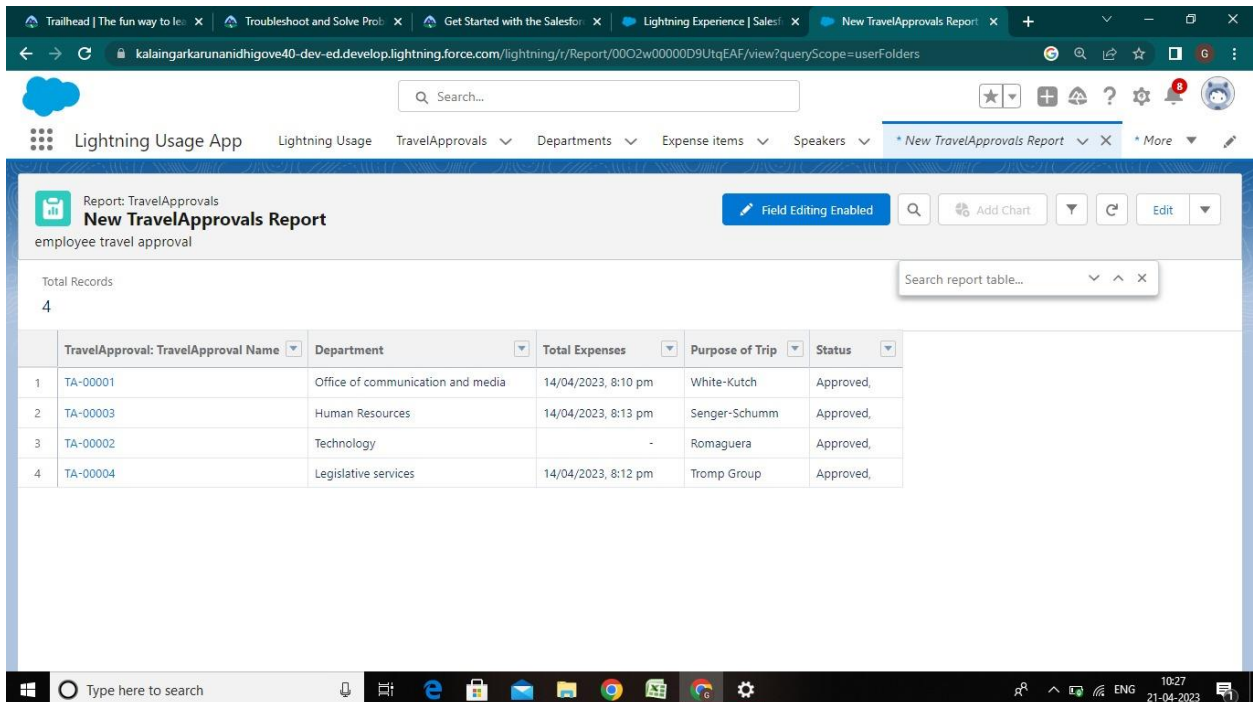


REPORTS

Reports in sales force is a list of record that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

Add Report

- To create a report:
- Go to the app – click on the reports tab.
- Click New Report.
- Select report type from category or from report type panel or from search panel – click on start report.
- Customize your report, then save or run it.



The screenshot shows the Salesforce Lightning Usage App interface. At the top, there's a navigation bar with tabs for 'Lightning Usage App', 'Lightning Usage', 'TravelApprovals', 'Departments', 'Expense items', 'Speakers', and 'New TravelApprovals Report'. Below the navigation bar, the 'New TravelApprovals Report' is displayed. It includes a search bar, a 'Field Editing Enabled' button, and a 'Search report table...' dropdown. The report shows 4 total records. Below the summary, there's a table with the following data:

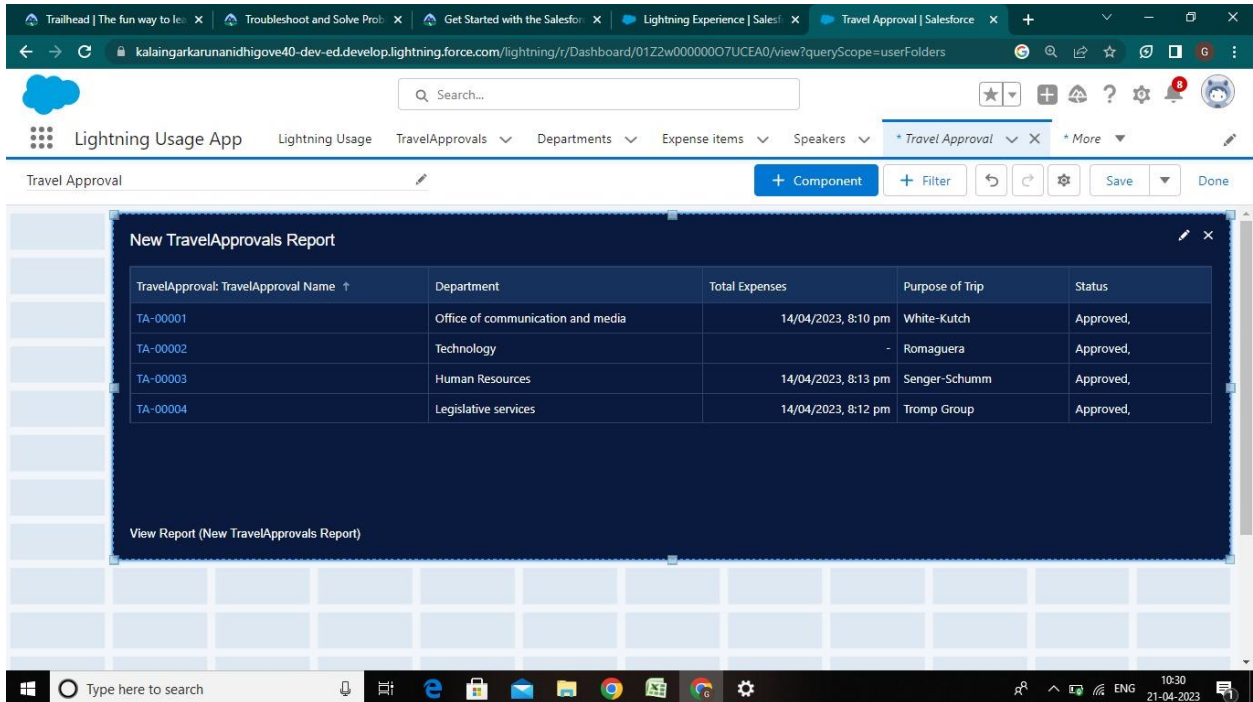
	TravelApproval: TravelApproval Name	Department	Total Expenses	Purpose of Trip	Status
1	TA-00001	Office of communication and media	14/04/2023, 8:10 pm	White-Kutch	Approved,
2	TA-00003	Human Resources	14/04/2023, 8:13 pm	Senger-Schumm	Approved,
3	TA-00002	Technology	-	Romaguera	Approved,
4	TA-00004	Legislative services	14/04/2023, 8:12 pm	Tromp Group	Approved,

DASHBOARDS

Create Travel Approvals Dashboard

- Click on Dashboards tab from the travel approval application, click on new dashboard.
- Give your dashboard a name and click on +component, select the report which you created.

- For the data visualization select any of the chart, table etc as your wish.



The screenshot shows a Salesforce Lightning Experience interface. The top navigation bar includes the Lightning Usage App and various tabs like Lightning Usage, TravelApprovals, Departments, Expense items, and Speakers. The main content area displays a 'New TravelApprovals Report' table. The table has five columns: TravelApproval Name, Department, Total Expenses, Purpose of Trip, and Status. It contains four rows of data, all with a status of 'Approved'.

TravelApproval: TravelApproval Name ↑	Department	Total Expenses	Purpose of Trip	Status
TA-00001	Office of communication and media	14/04/2023, 8:10 pm	White-Kutch	Approved,
TA-00002	Technology	-	Romaguera	Approved,
TA-00003	Human Resources	14/04/2023, 8:13 pm	Senger-Schumm	Approved,
TA-00004	Legislative services	14/04/2023, 8:12 pm	Tromp Group	Approved,

4 Trailhead Profile Public URL

Team Leader: - DEEPA THARISANA .V

<https://trailblazer.me/id/dtharisanavelayutham>

Team Member 1:- DHURKADEVI .A

<https://trailblazer.me/id/dayyanar1>

Team Member 2: - DIVYA .A

<https://trailblazer.me/id/darmugam11>

Team Member 3: - GAYATHRI .D

<https://trailblazer.me/id/gdhanabal>

5 ADVANTAGES & DISADVANTAGES

LIST OF ADVANTAGES:

- A Corporate travel agency can use their established relationships with airlines or hotels to negotiate better rates and discounts.
- A Corporate travel agency or system save employees time, compared to searching the web every time they need a flight, accommodation or meeting space.
- An ARC or IATA licensed corporate travel agent can issue tickets directly to employees rather than involving a third party organization.
- A system-led corporate travel agent provides reports that show the most frequently used routes, hotels and travel services.
- A corporate travel agency may provide traveler support, helping to solve issues when employees are travelling.

List of Disadvantages:

- As should be expected, there are fees accompanying that awesome TMC that consolidated your company travel.
- This can be true even if the traveler has booked everything online but needs to make a change that requires agency help due to system limitations.
- The ease of familiar, user-friendly interfaces makes it awfully tempting for employees booking business travel to search and make

reservations through their favorite travel websites, just as they would for personal travel.

- If a traveler needs to call the TMC multiple times to secure a booking, there might be multiple interaction changes even though it's only one transaction.
- Travel managers negotiate discounted rates based on volume.

6 APPLICATIONS

There are many applications out there for managing employee expenses and managing travel. Considering 70% of expenses are travel-related, having separate applications for travel bookings and expense reimbursements result in cost leakages, poor data visibility makes no sense. And on top of all this, it provided a broken experience to employees as well as finance managers. A truly integrated travel and expense management solution like ITILITE can get you better control, visibility, compliance, and a better experience.

7 CONCLUSION

Streamline all your key finance processes like travel and expense reimbursement claims, travel approval, and budget requests with Kiss flow Finance & Ops Cloud. While the business travel approval process may seem overwhelming when everything is done manually, this doesn't have to be the case forever. By creating an organized plan, communicating it well, and using an automated, centralized system, you can change the way your company does business travel.

8 FUTURE SCOPE

A Sales force career gives candidates a high earning potential not only in the present but also in the future scope for career growth and salary is sky-high. One of the biggest benefits of being a Sales force developer is that you can make the most of your existing investment. This means that you can take advantage of new business opportunities and boost your overall customer satisfaction.