

Capstone Project Report On "Travel Approval App"

Git Hub: https://github.com/karimunn/capstone_project.git

Submitted by:

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LMS Id: MGSA 533

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Abstract

Every travel organization requires a Travel Approval Application. This department deals with the approval of travel requests. It also allows for prime levels of control and oversight over travel bookings, policy and budget. The approval process is usually often lengthy and requires a lot of paperwork. It requires so much of time and work efforts to complete it. To eradicate human errors and achieve perfect data and procedures, the use of software is considered a smart choice.

Therefore, with the help of Customer Relation Management (CRM) software services provided by Salesforce, we are making a travel approval application. It starts with building of data model where the objects and fields comes into picture follows by customizing the user interface where we Use list views and page layouts to streamline an app user's experience. Every application generally needed a business logic so in this it is achieved by validation rules, formula fields and approval process. Finally, to analyze travel approvals we add reports and dashboards. This application will help them in keeping track of the complete travel approval process.

Introduction

Salesforce is a cloud-based software company that provides its customers with a platform to develop their own applications without following the tough steps that they used to follow in the legacy system. The software or application once created can be uploaded onto the cloud allowing the end-users to view them.

Salesforce is currently providing various software solutions and platforms for developers to create and distribute custom software/applications. Tech giants like Google, Twitter, Amazon, and Facebook are using Salesforce either in the form of SaaS or PaaS.



Salesforce developers can make an application on the cloud and share it with multiple companies across multiple domains by using Salesforce.

Talking about HR systems, every company across the globe has an HR team. Each HR team would require an HR application to store employee records. Almost all specifications for such an application would be common for all companies. So, as a developer, it would be very easy to create a Salesforce application for such specifications, post it onto the cloud, and provide it as a service to multiple clients at the same time. Maintenance of the same can be done altogether too. So basically, the problem of scalability gets eliminated.

Flow of the Project

1. Travel Request Submission: Sales representatives submit travel requests using the Travel Approval App within the Salesforce platform. The request includes details such as travel dates, destinations, budgets, and purpose.

Automated Routing of Requests: The app automatically routes the travel request to the appropriate approvers based on pre-defined rules and workflows. This ensures that requests are reviewed by the right people, in the right order

- **1. Review and Approval:** Approvers receive notifications when a travel request requires their approval. They can review the request details and approve or reject it within the app.
- **2. Notification and Feedback**: Sales representatives are notified of the approval or rejection of their travel request. If rejected, the app may allow the representative to revise and resubmit the request.
- **3. Real-Time Reporting**: The app provides real-time visibility into travel requests and approvals, allowing sales managers to monitor travel spend and make informed decisions about their teams' travel plans.

Software Requirements

For the fastest and most stable experience, we recommend:

- An Octane 2.0 score of 30,000 or greater
- Network latency of 150 ms or less
- Download speed of 3 Mbps or greater
- At least 8 GB of RAM, with 3 GB available for Salesforce browser tabs

Minimum requirements are:

- An Octane 2.0 score of 20,000 or greater
- Network latency of 200 ms or less
- Download speed of 1 Mbps or greater
- At least 5 GB of RAM, with 2 GB available for Salesforce browser tabs

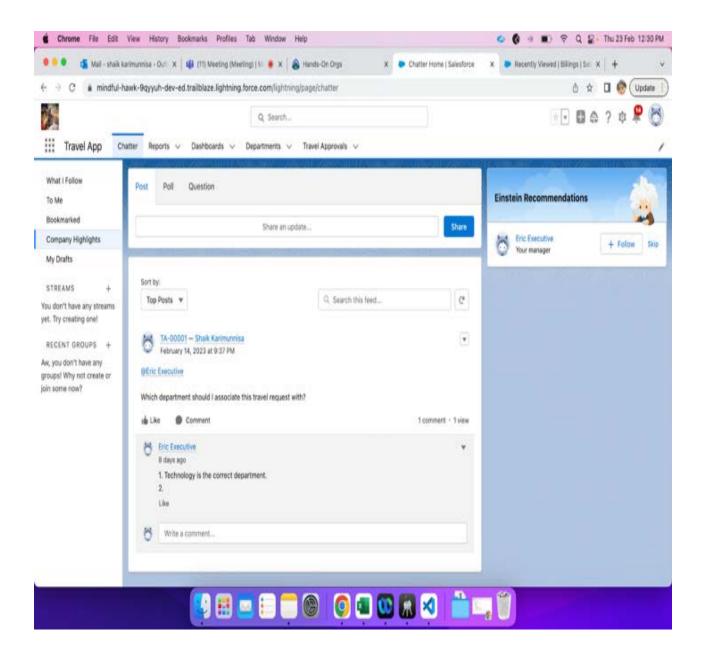
OR

Requirements		
Windows		
Operating system	Windows 8.1 64-bit, Windows 8 64-bit, Windows 7 Service Pack 1 64-bit, Windows Vista Service Pack 2 64-bit	
CPU	Core 2 Quad Q6600 at 2.4 0 Phenom 9850 at 2.5 GHz	GHz or <u>AMD</u>

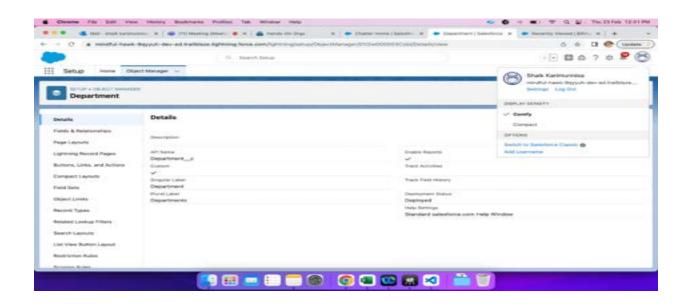
Memory	4 GB RAM	
Free space	65 GB of free space	
Graphics hardware	DirectX 10-compatible GPU: GeForce 9800GT 1GB or ATI Radeon HD 4870 1GB	
Sound hardware	DirectX 10 compatible sound card	

Module 1

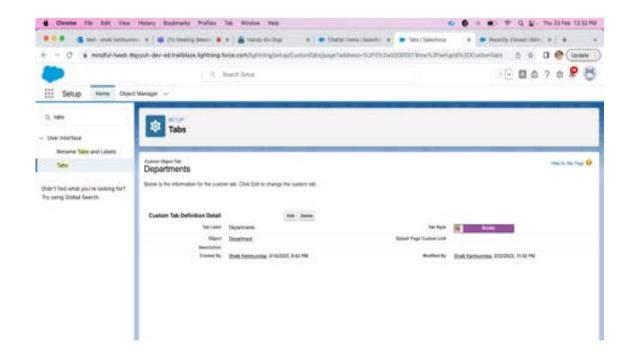
Exercise - 1 Step - 1



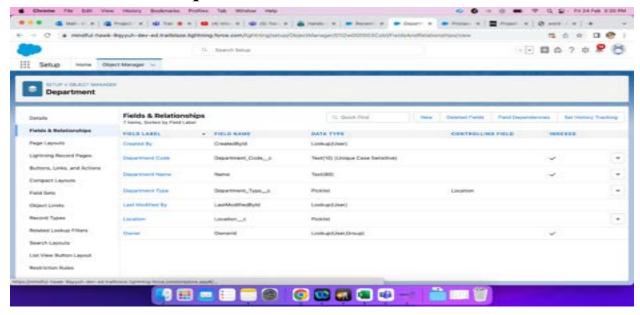
Created Department Custom Object



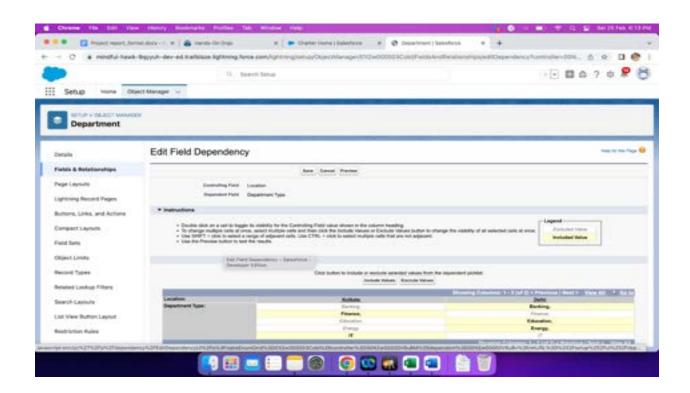
Created new Custom object Tab



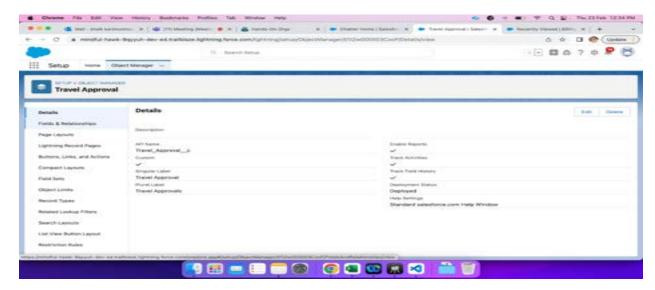
Created all the required Custom Fields



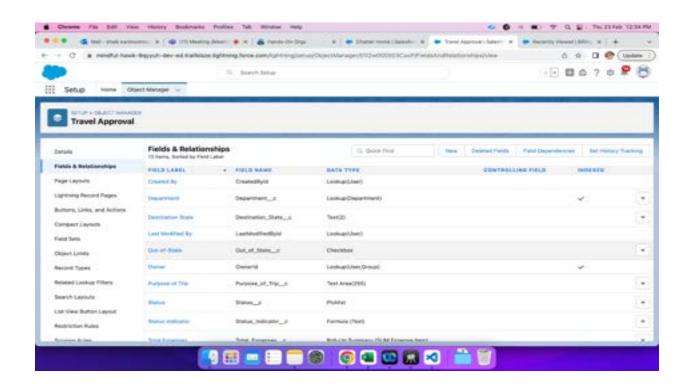
Create Field Dependency



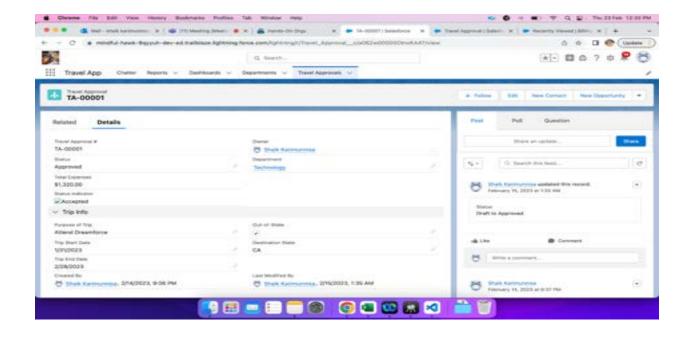
Created the required Travel Approval Object



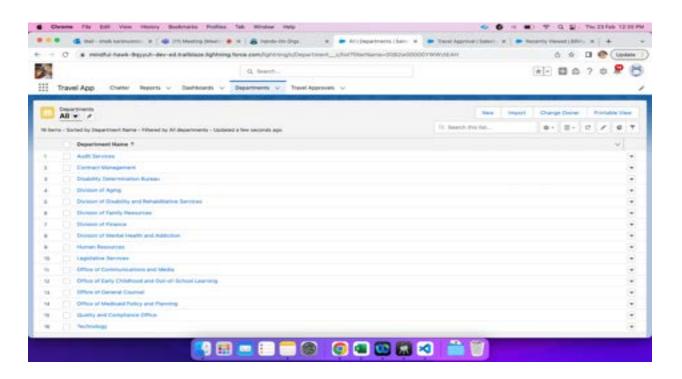
Created the required Fields



After Testing the App



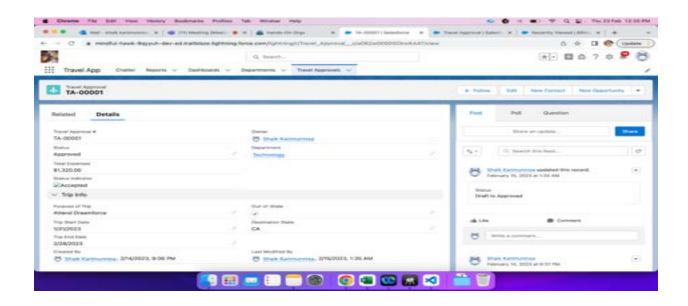
Step 5 Imported Department.CSV file using Data Import Wizard



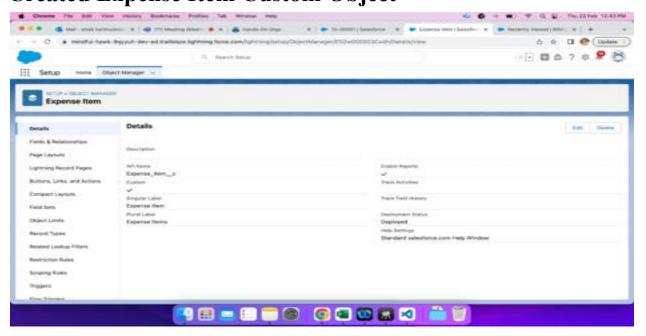
Exercise 2

Step-1

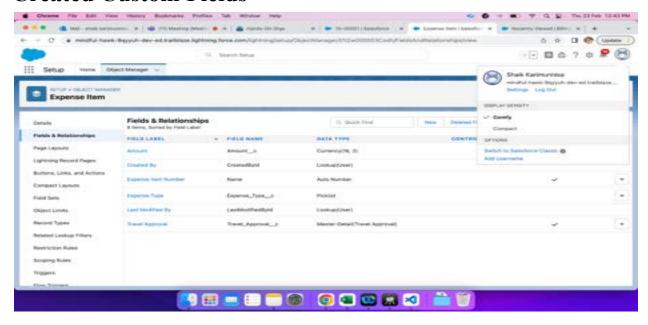
Created Travel Approval record



Step 2 Created Expense Item Custom Object

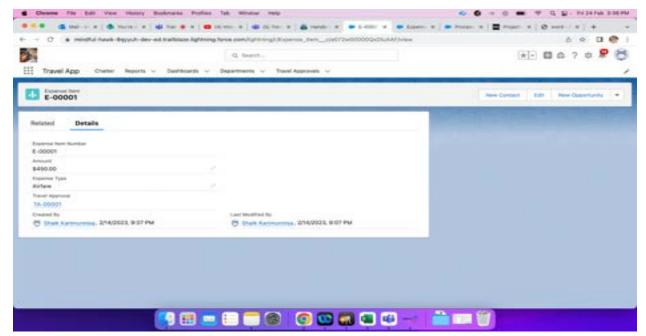


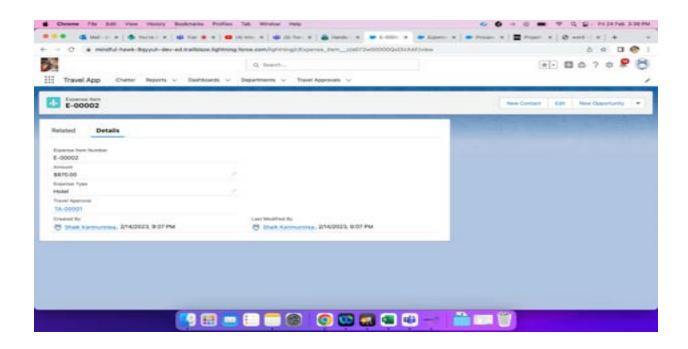
Created Custom Fields



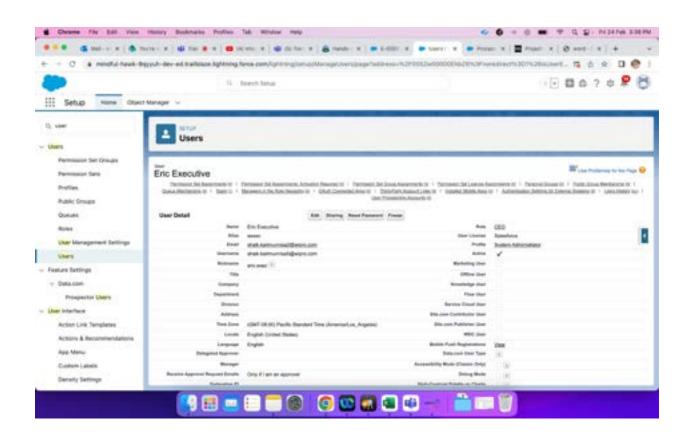
Step 4

Created Records

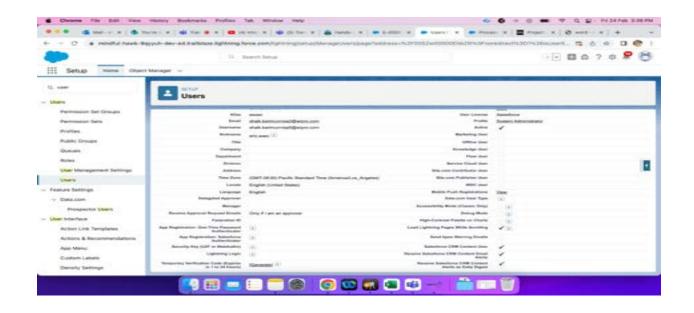




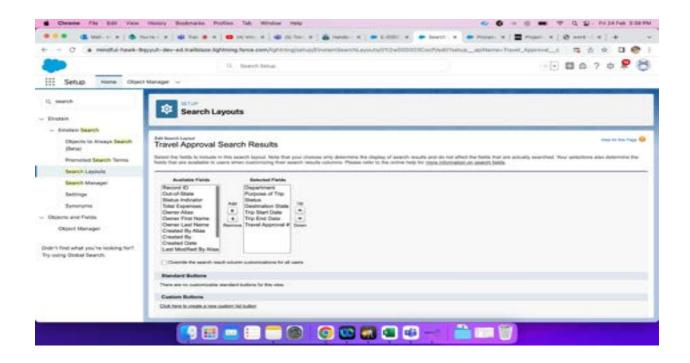
Step 5 Created User Eric



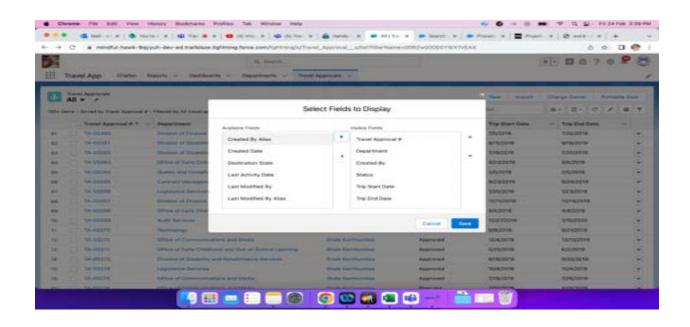
Step 6 Added Eric Executive as manager to System Administrator



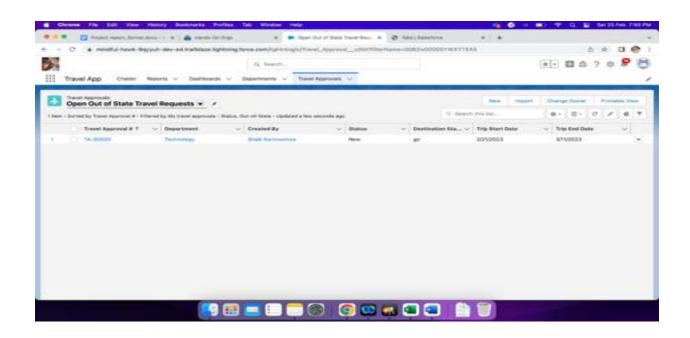
Step 7
Customized the Travel Approval Default Search



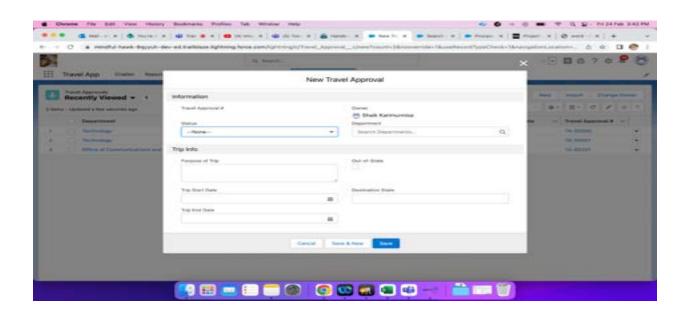
Step 8
Selected all the fields to display



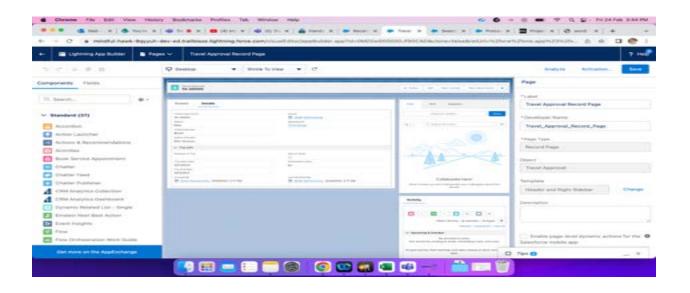
Step 9 Created Travel approval custom List view Open Out of State Travel Requests

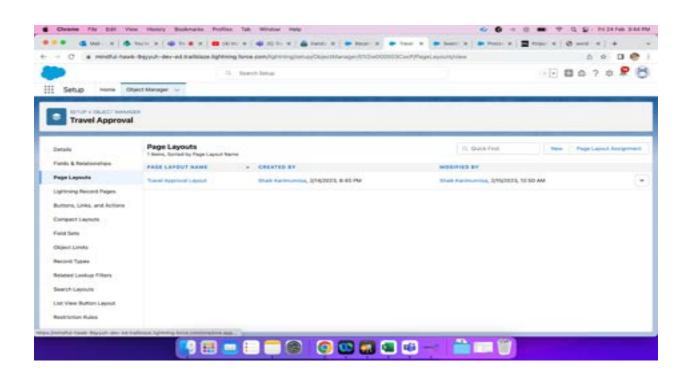


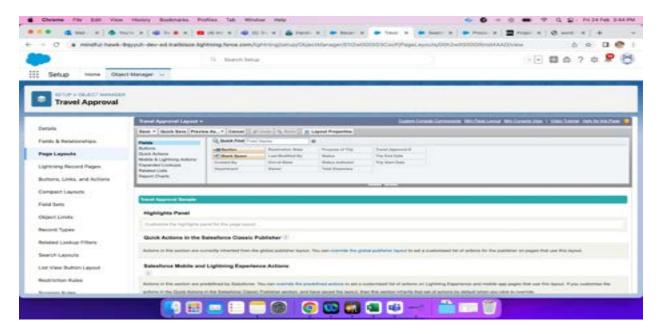
Step 10 Selected fields to display in the Travel Approval Open Out of State Travel Requests



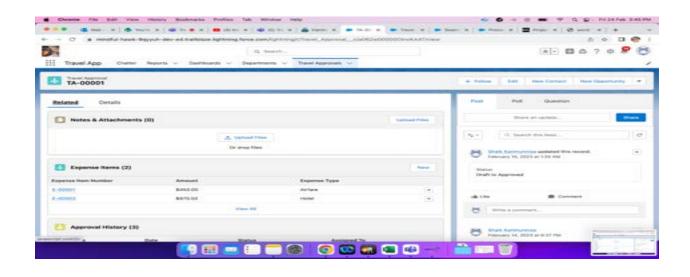
Step 11 Customized Travel Approval Page Layout



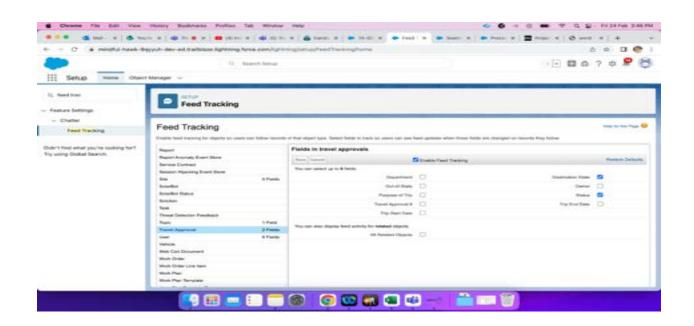


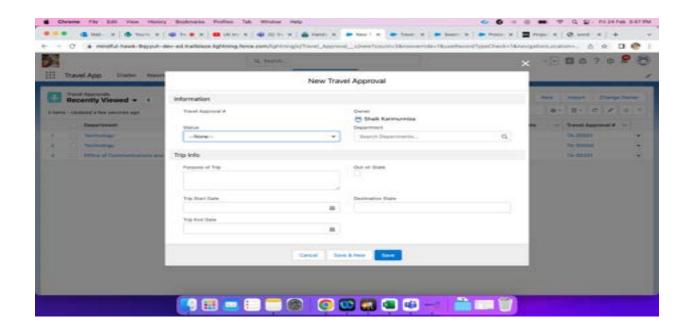


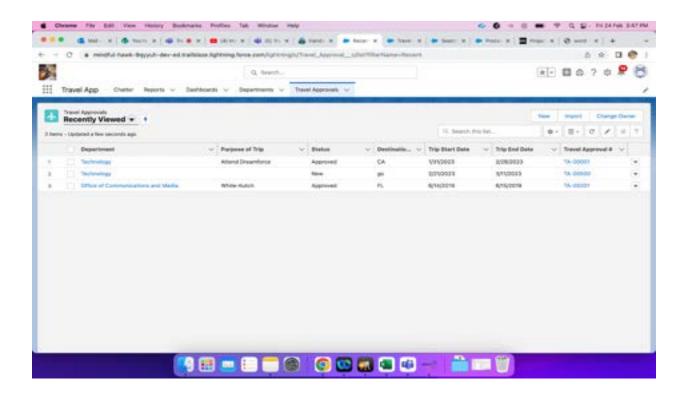
Step 12 Customized the Expense Item Related list Under Travel A Approval page layout



Step 13 Enabled Feed Tracking



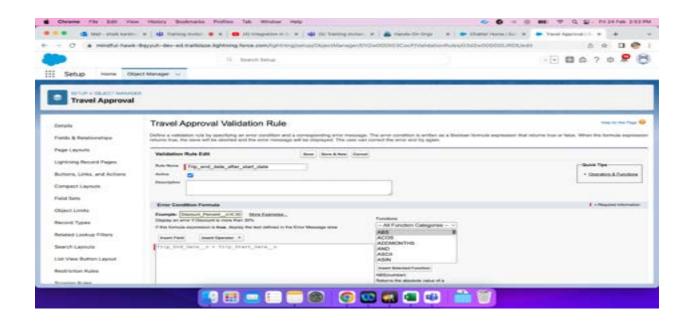


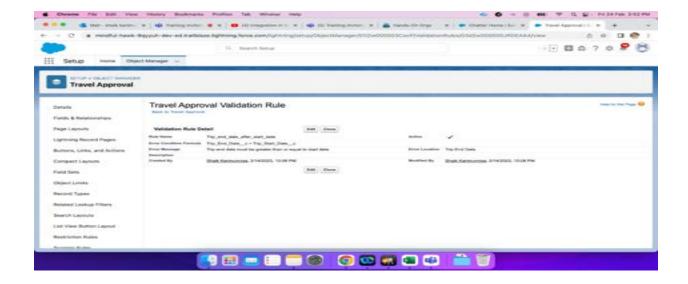


Module 2

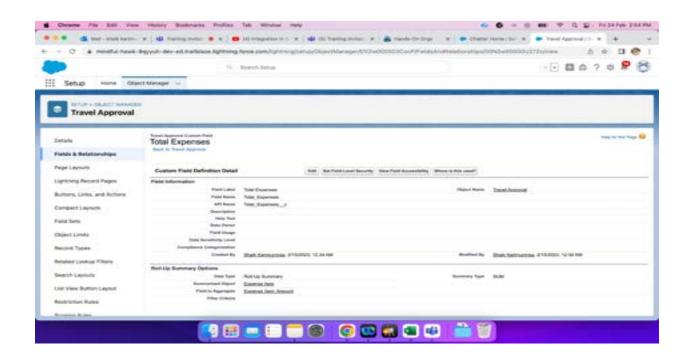
Exercise-1

Step 1 Created Trip end date after start date Validation Rule

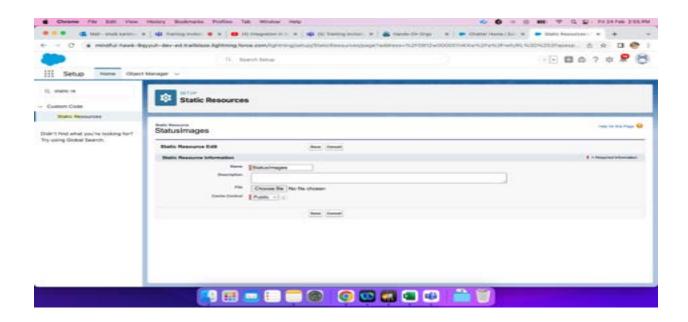


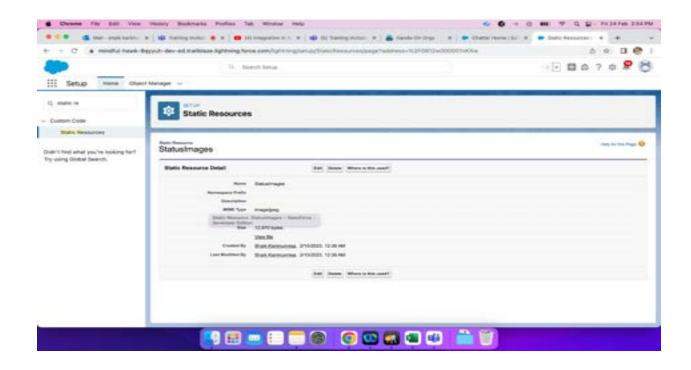


Step 2 Created a Roll Up Summary field Total Expenses

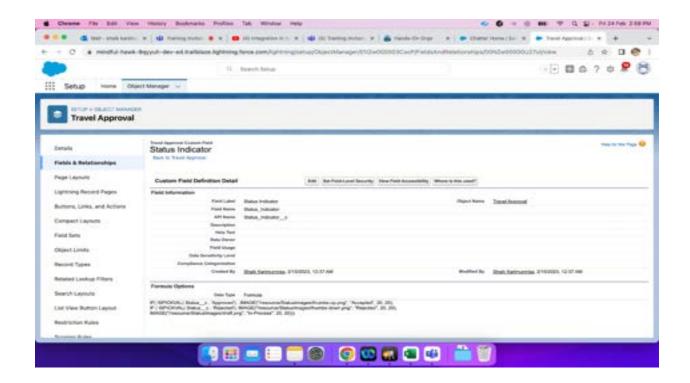


Step 3
Created a formula field StatusImages



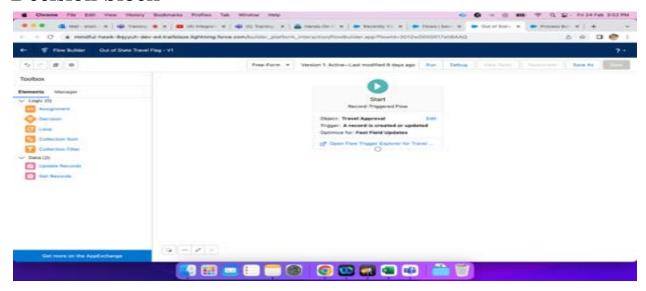


Step 4 Created a formula field Status Indicator

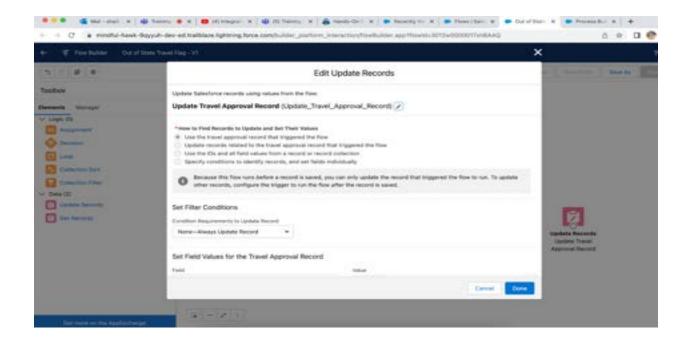


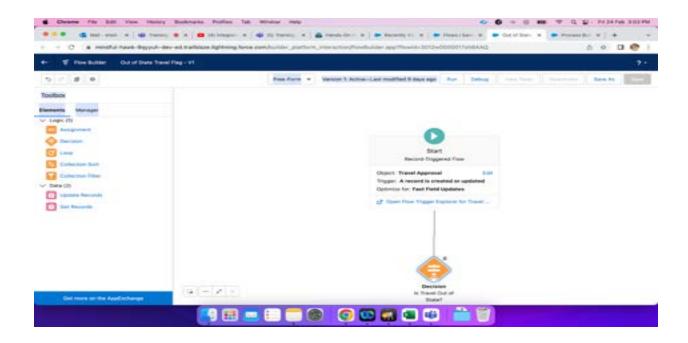
Created a record – Triggered flow

Decision block

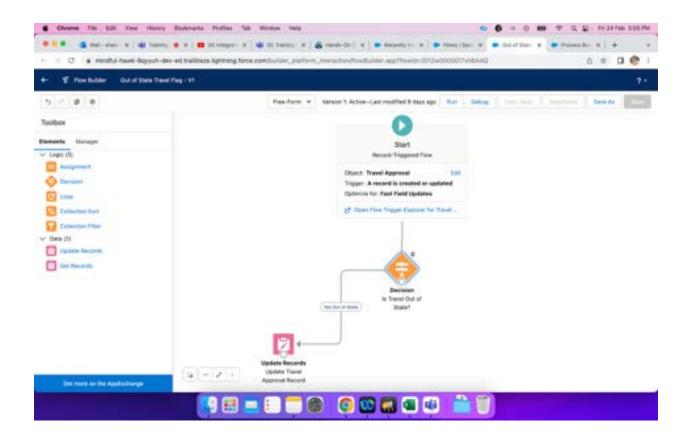


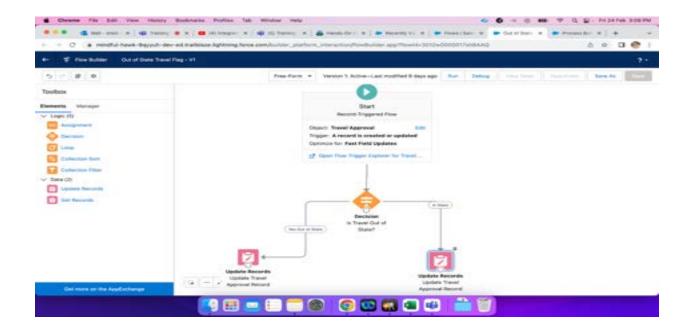
Updated Travel Approval Record(Yes out of State)



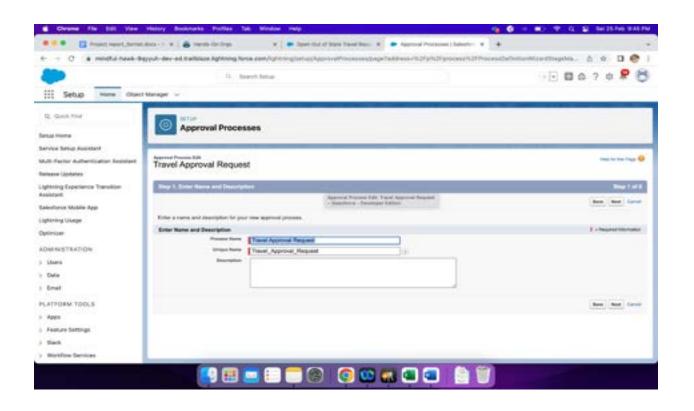


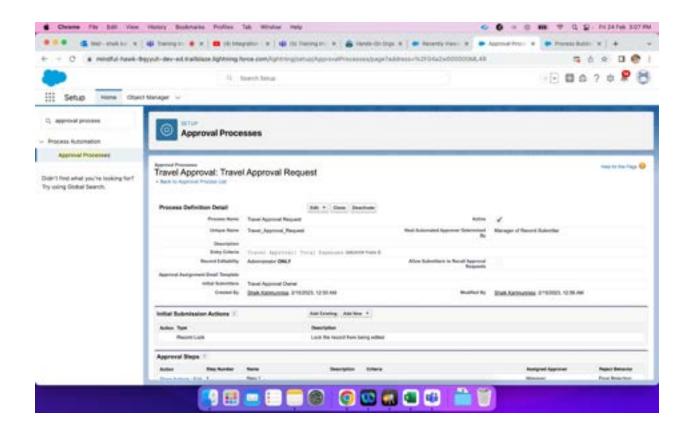
Updated Travel Approval Record(In State)



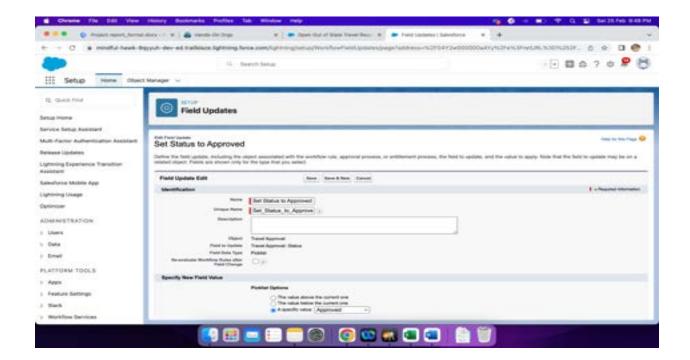


Step 6 Created an approval process Travel Approval Request

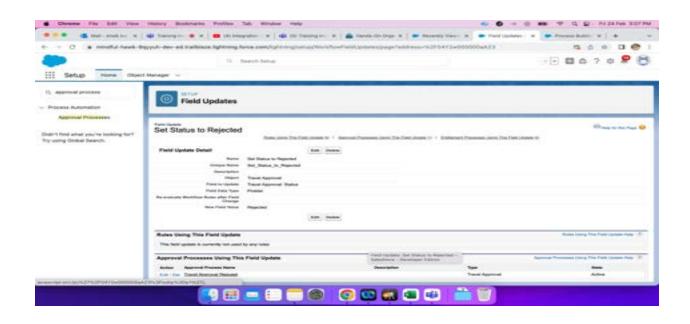


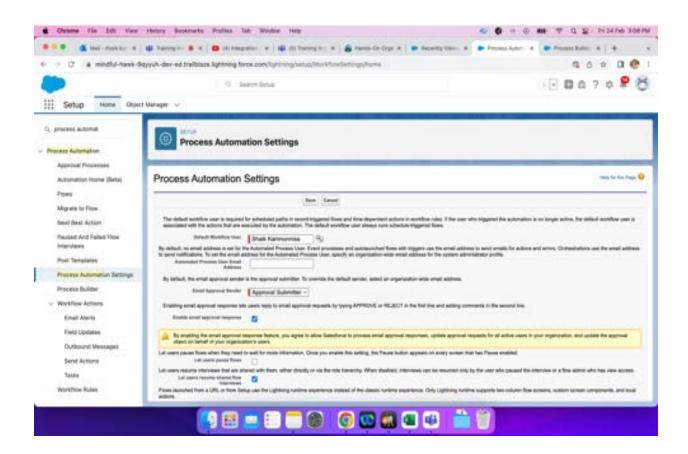


Final Approval Actions



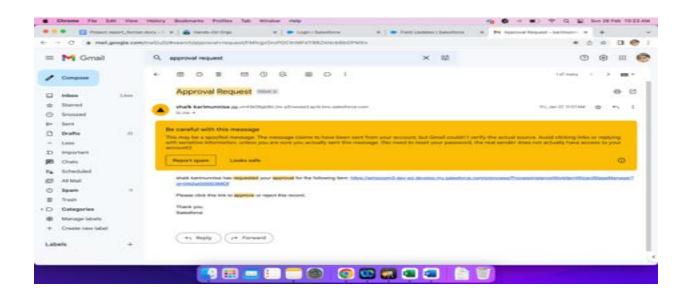
Final Rejection Actions



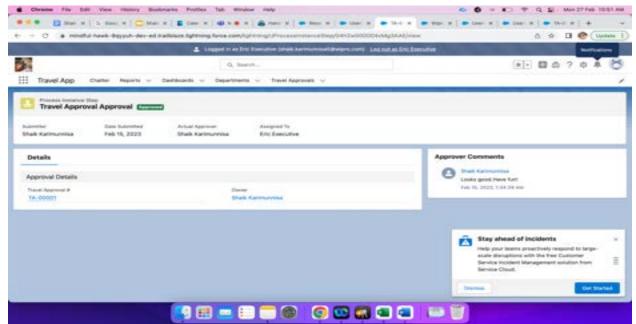


Testing the Approval Process

Received an Email

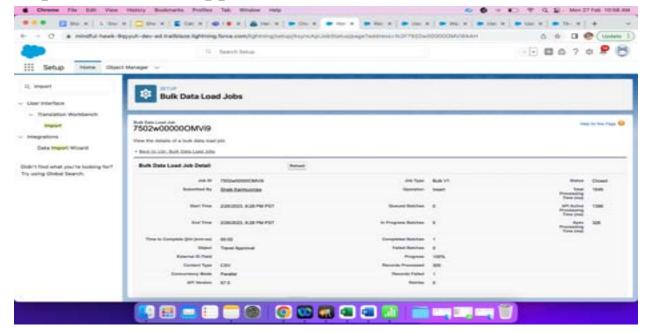


Assigned to Eric Executive

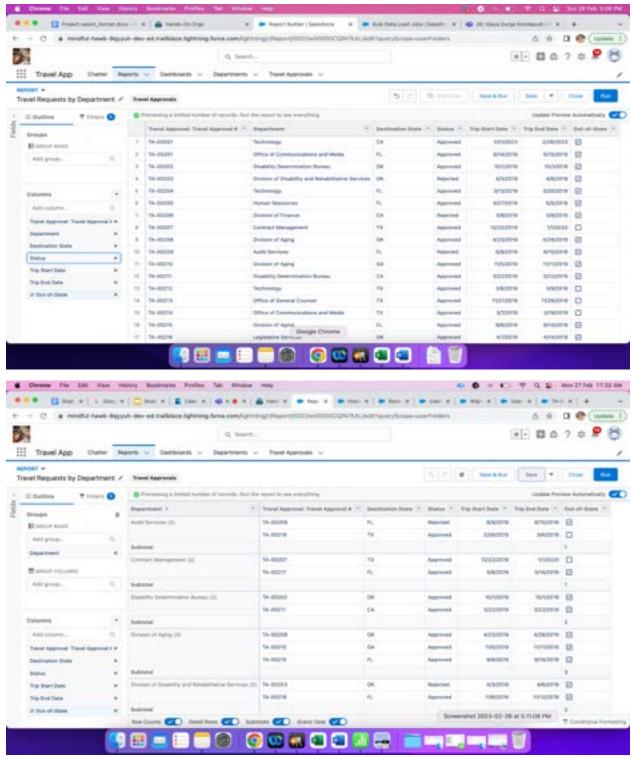


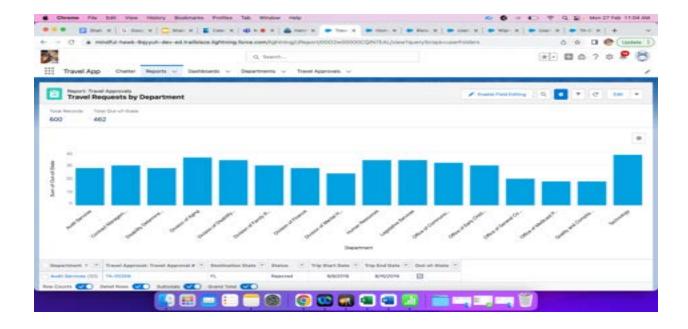
Exercise 2 Step 1

Imported Travel Approval Records

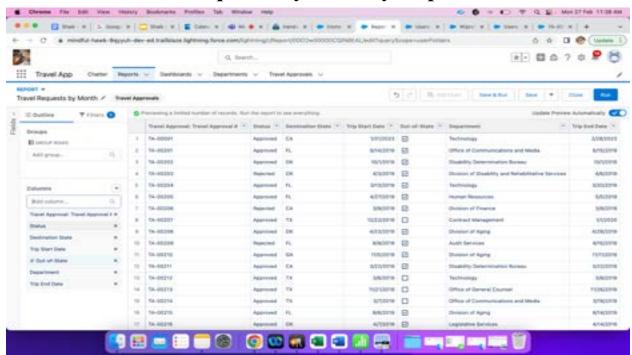


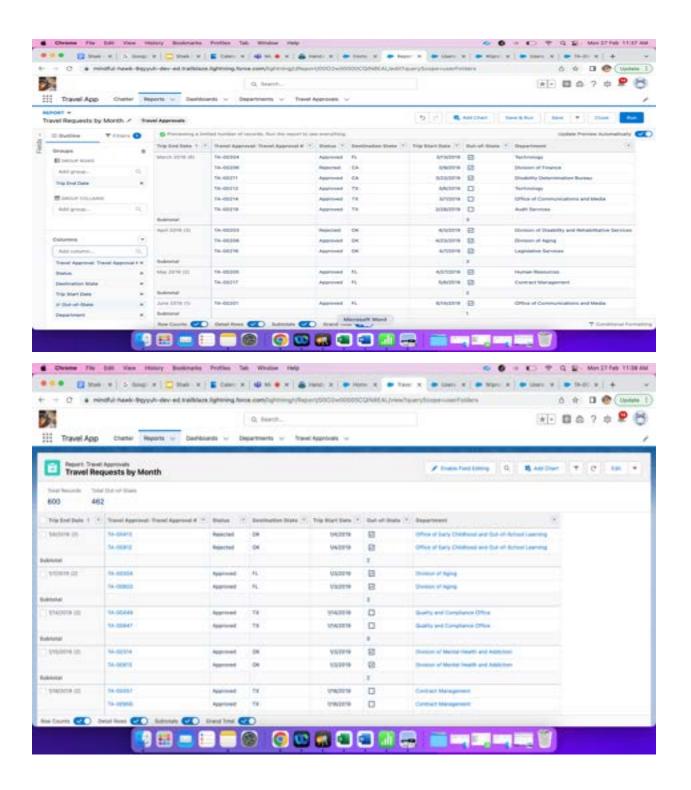
Step 2
Created a Report on Travel Requests by Department

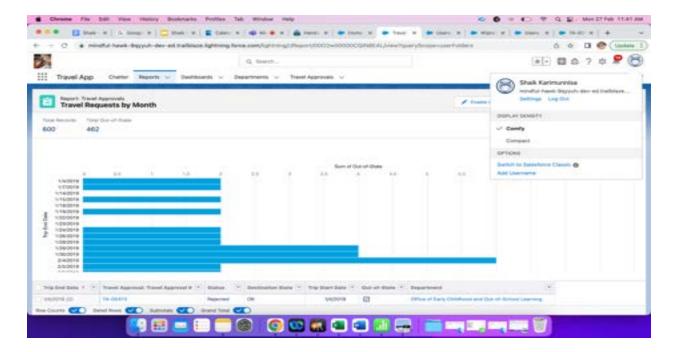




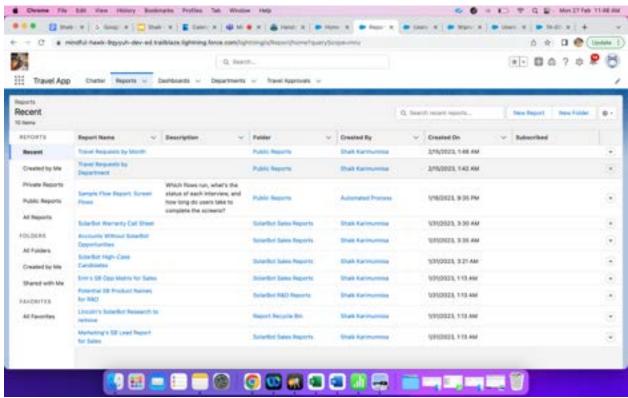
Step 3 Created a Travel Requests by Monthly Report

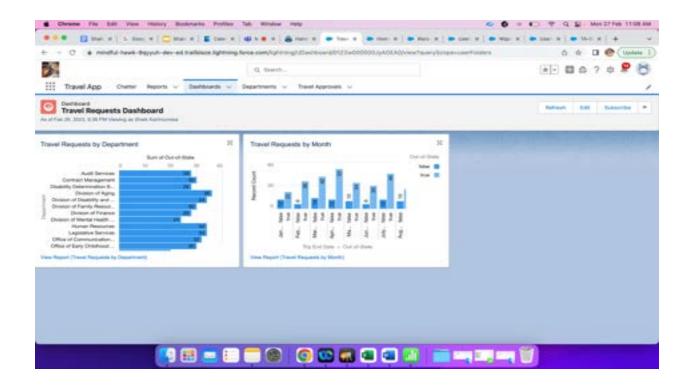






Step 4
Created a Report and Dashboard for Travel Approvals

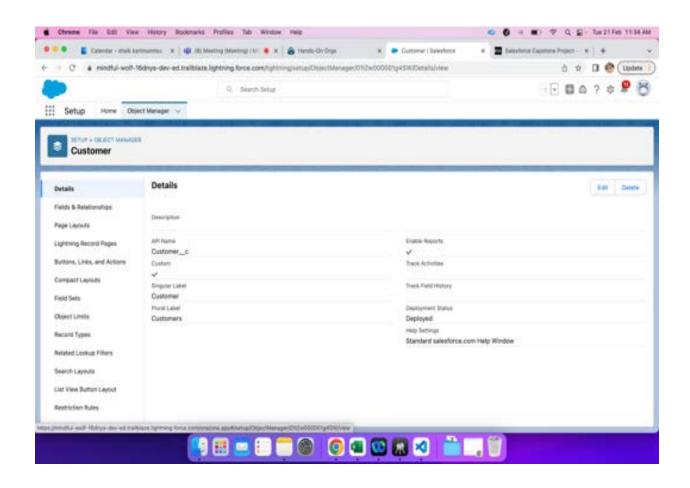




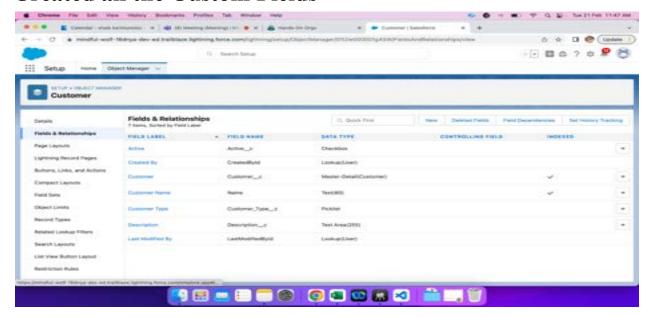
Module 3

Exercise 1

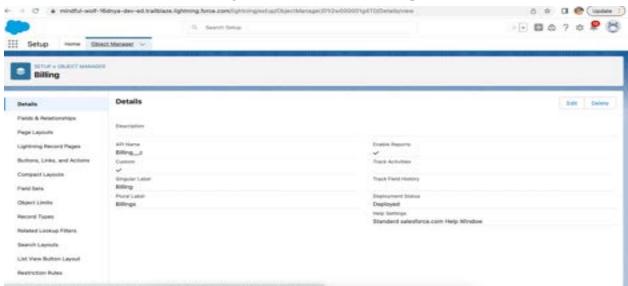
Created the Custom Object Customer as there is already a Standard Object named Customer



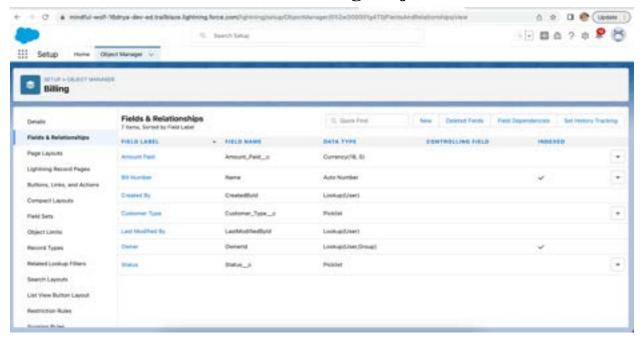
Created all the Custom Fields



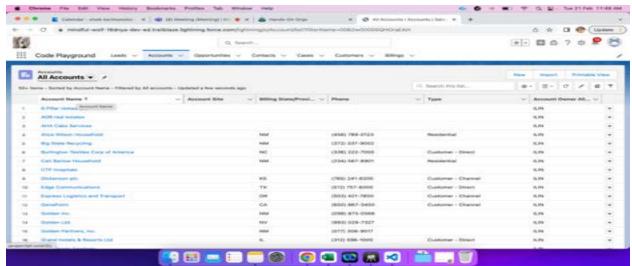
Created a Custom Object named Billing



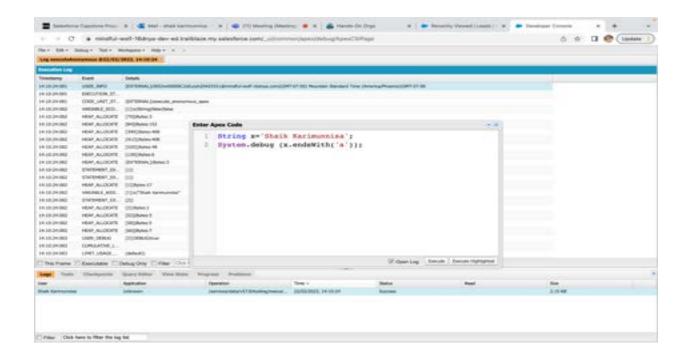
Created a Custom fields for billing Object



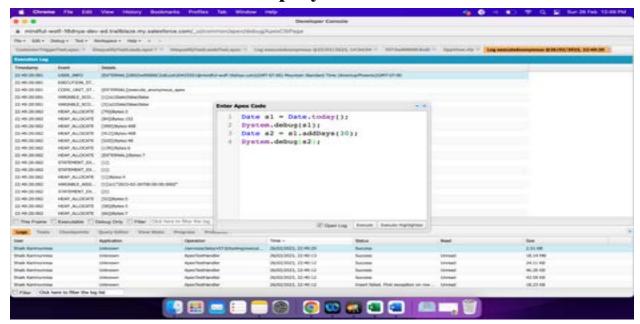
Code Playground App



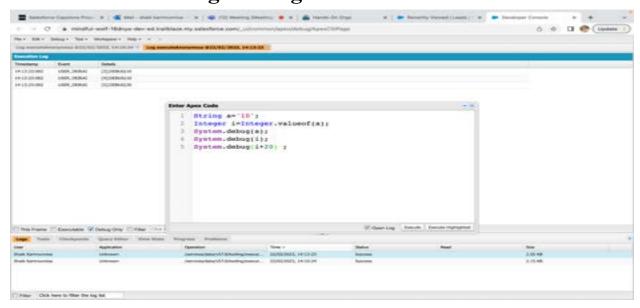
String Variable using ends with() method



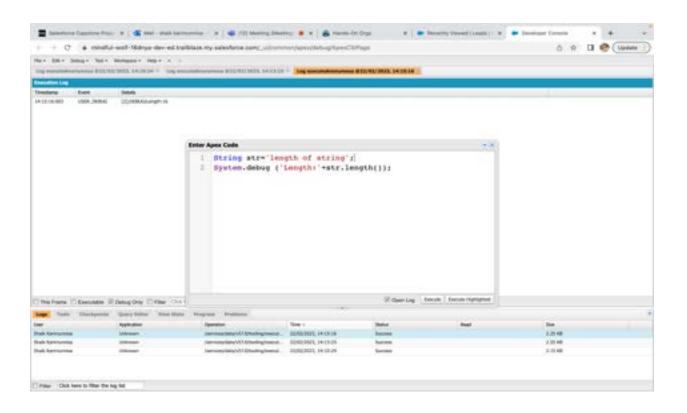
Used Date Method and displayed the date



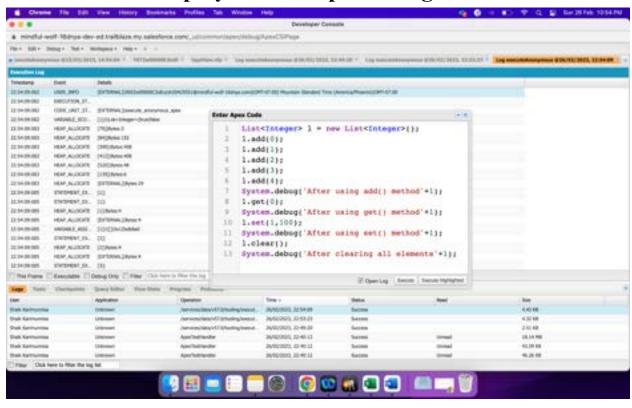
Converted the string to integer and added 20 to it



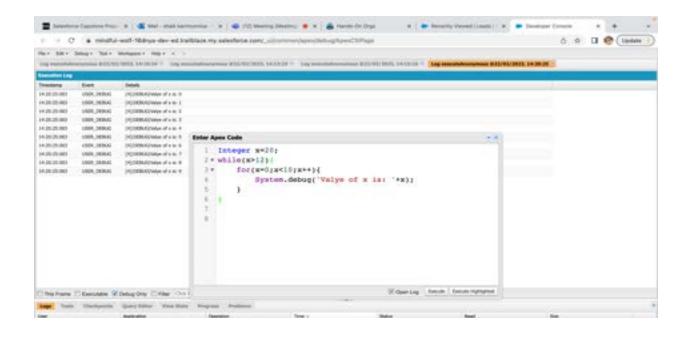
Used Length method to display String length



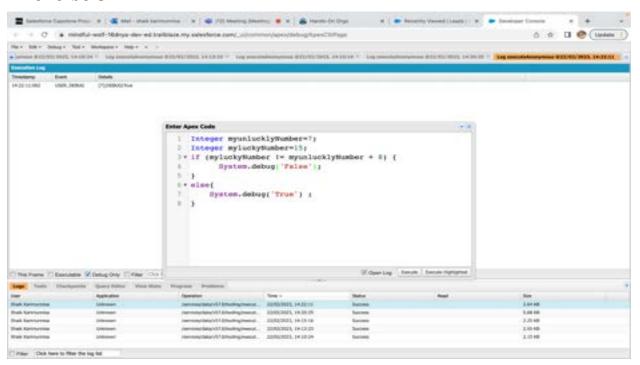
Defined a List displayed the outputs using different methods

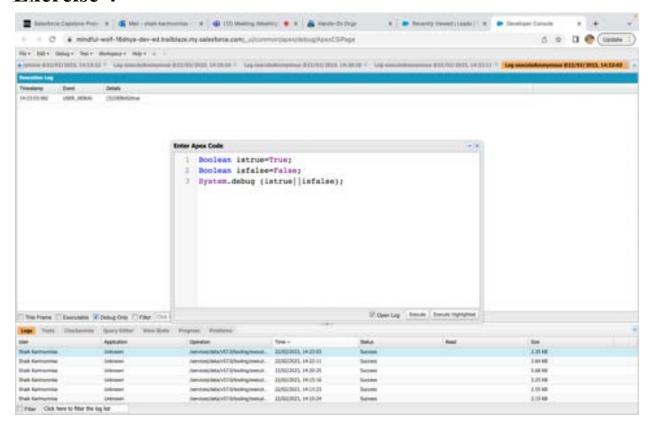


Printed numbers between 0 to 9

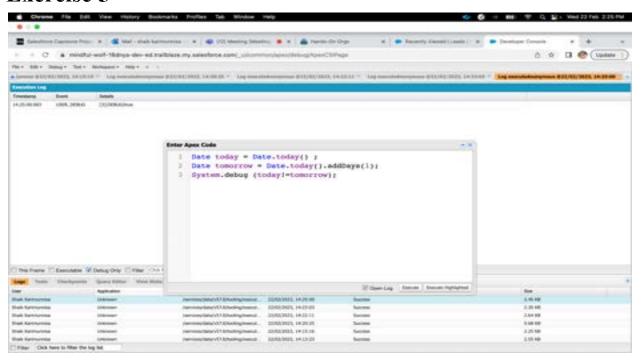


Exercise 3

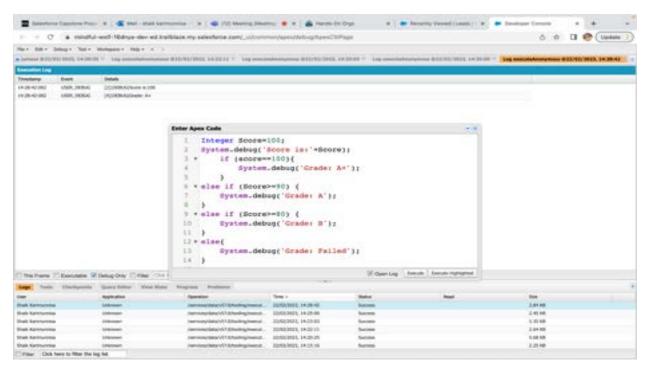




Exercise 5

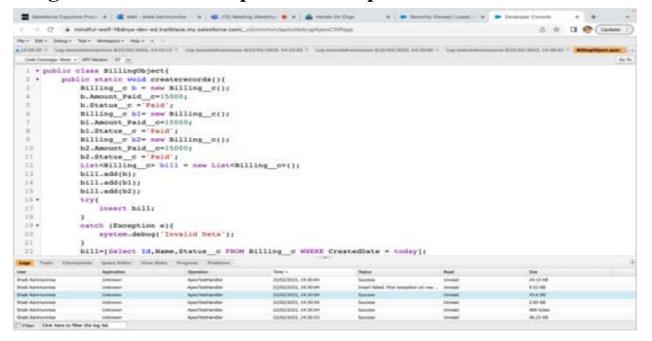


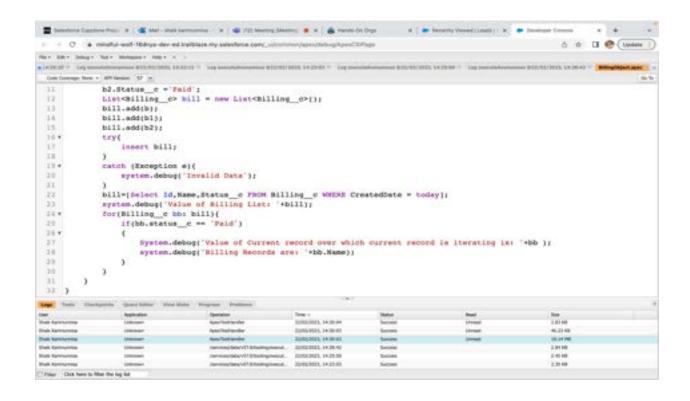
Program for Finding the Grade based on Score

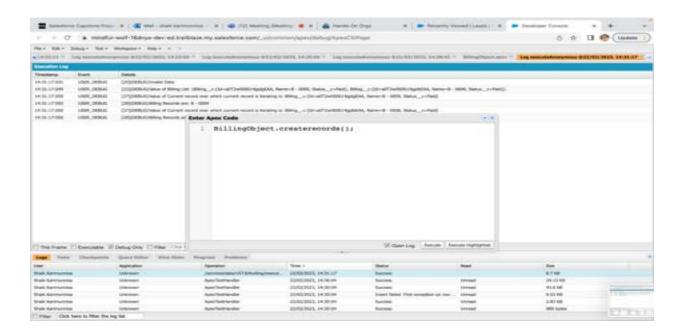


Exercise 7

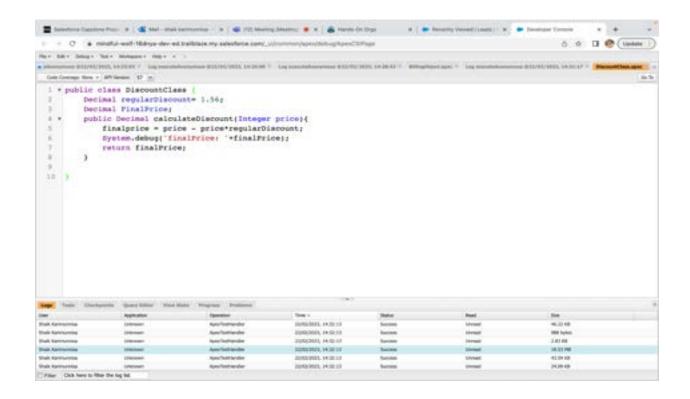
Program to execute Apex – for loop

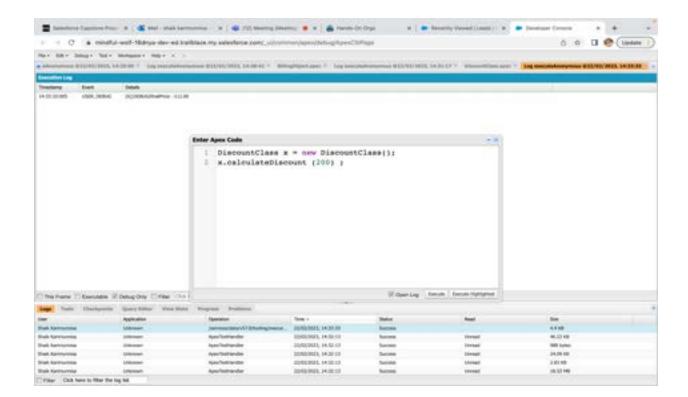


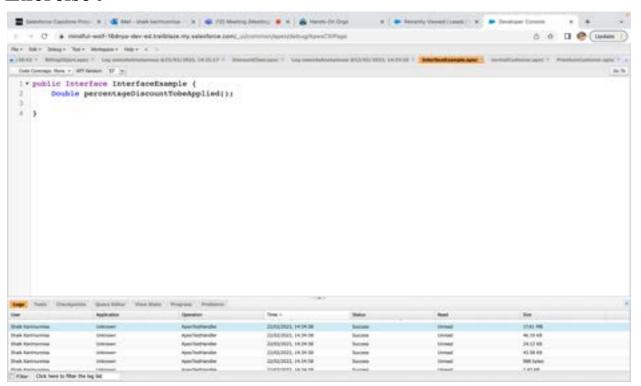


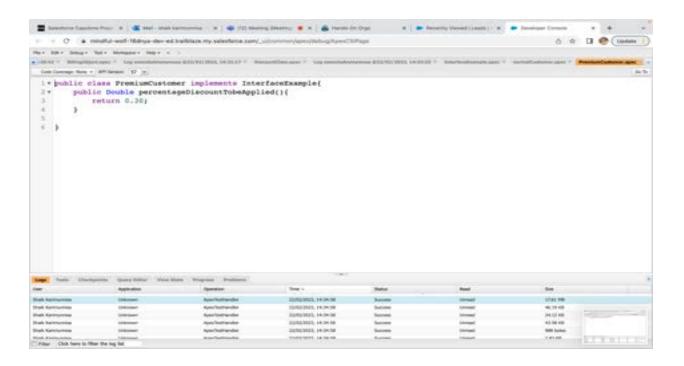


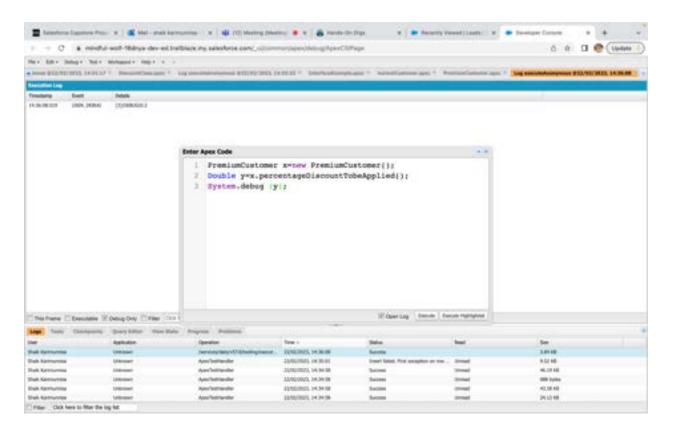
Created a Class to demonstrate constants in Apex

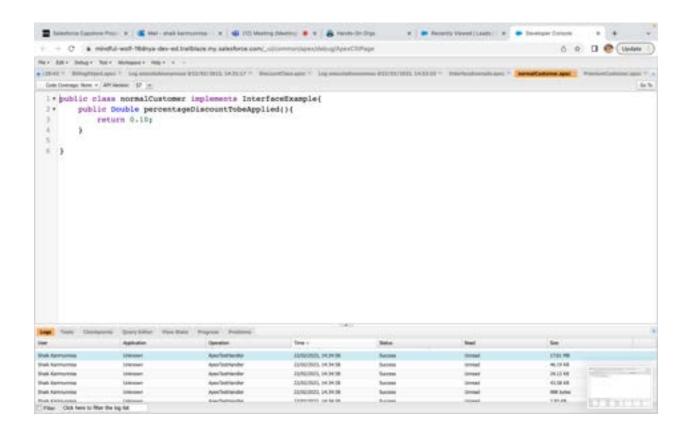




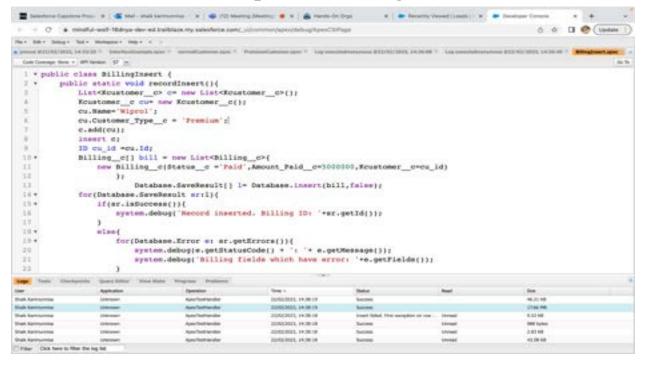


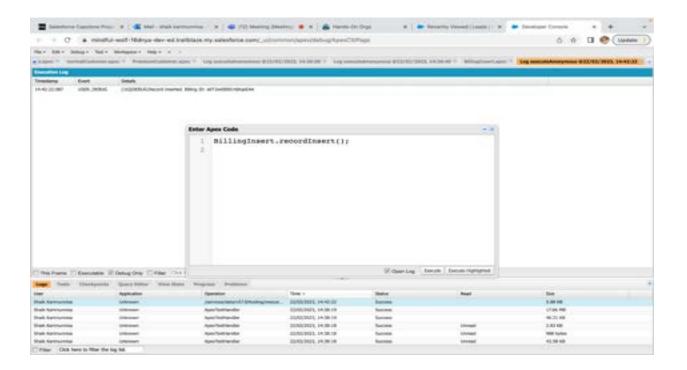




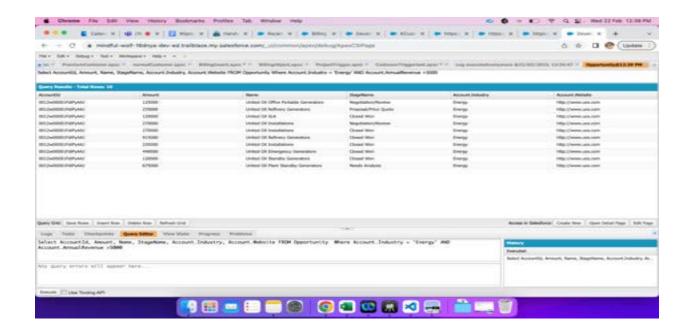


Demo on DML Insert Operation Using Database method

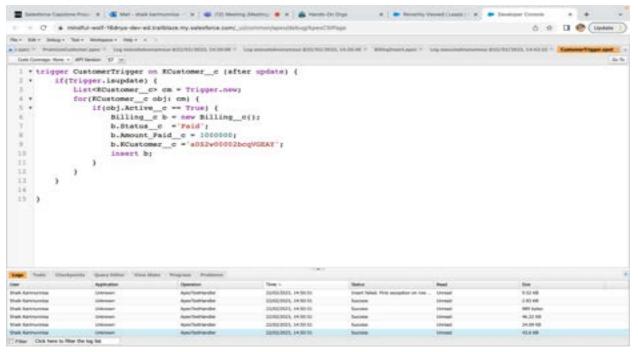




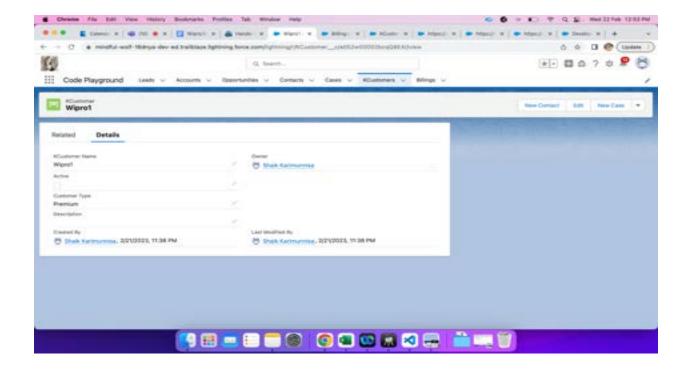
Displaying Records According to the required conditions

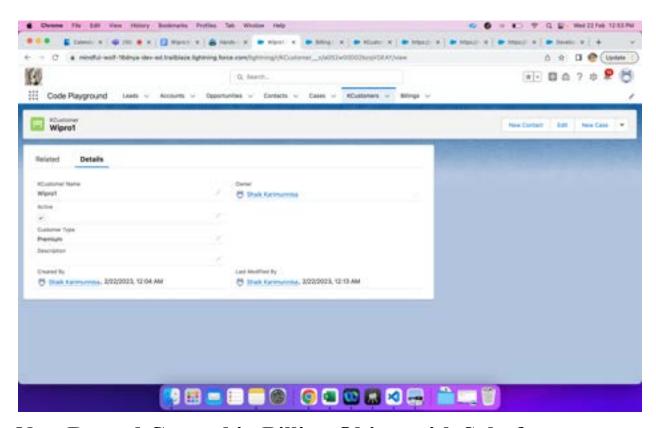


Created a Trigger for Billing Named Customer Trigger

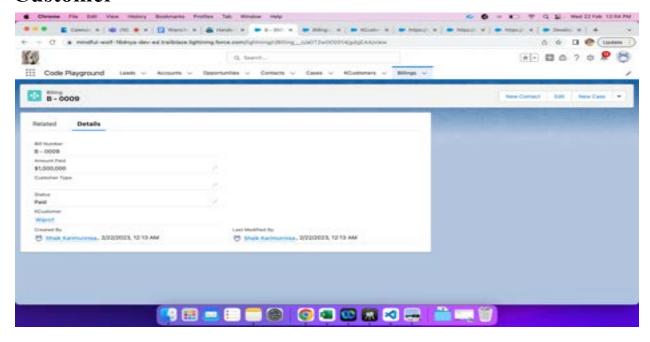


Updated Salesforce Customer from in active to active

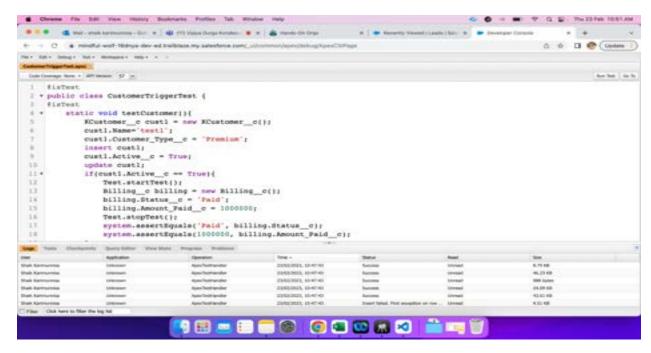




New Record Created in Billing Object with Salesforce as Customer

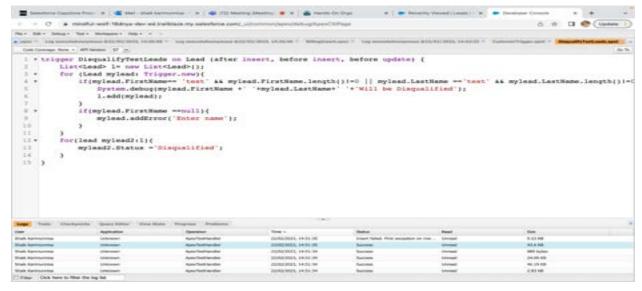


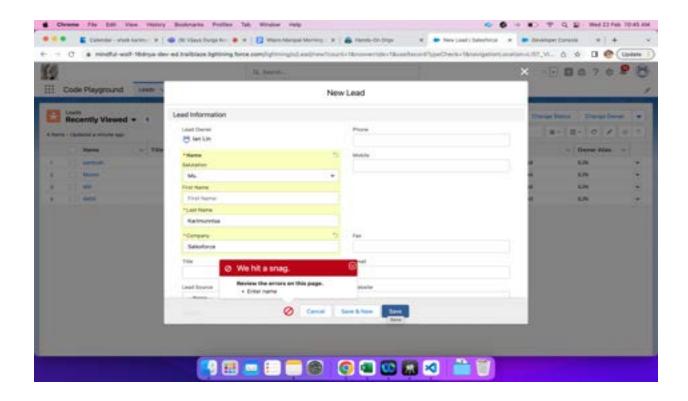
Created a Test class for Custom Trigger



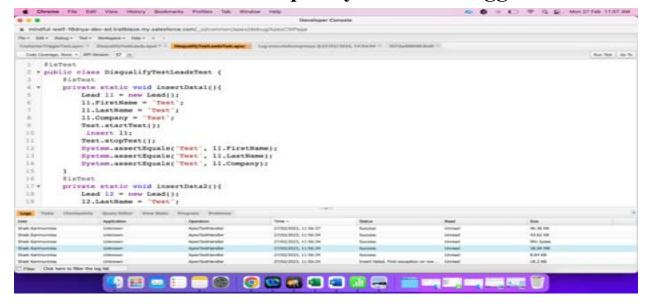
Exercise 14

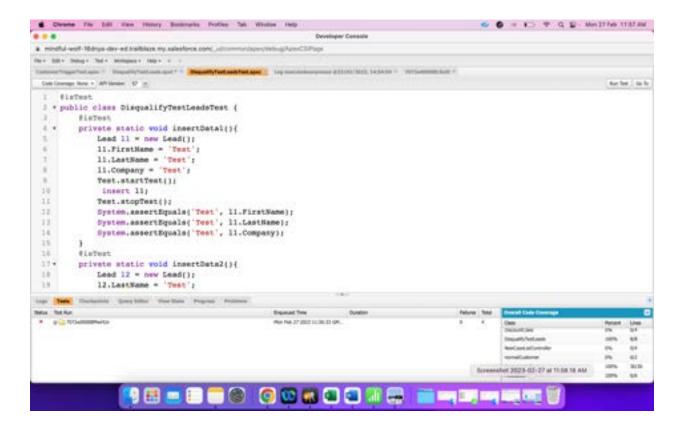
Created a Trigger for Leads Named DisqualifyTestLeads



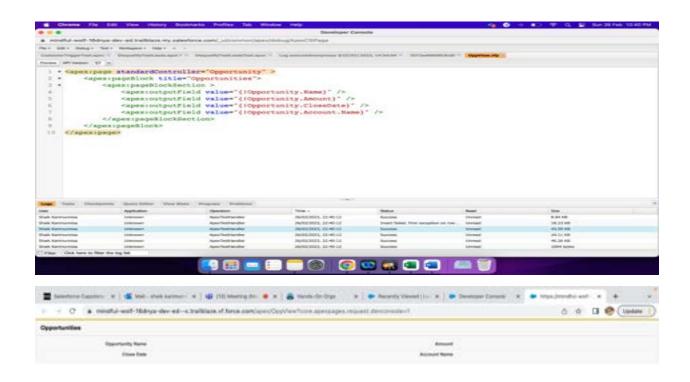


Created a test class for DisqualifyTestLeadstrigger

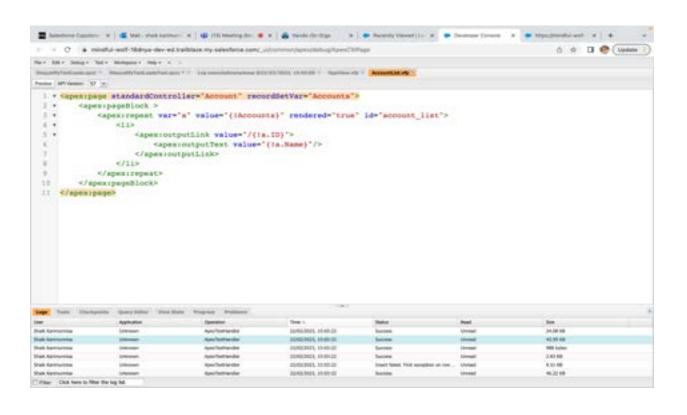


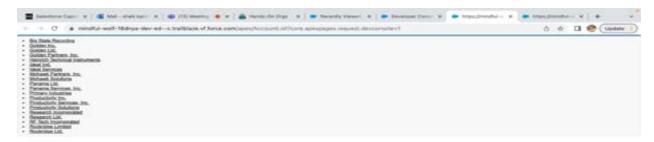


Created a Visualforce Page OppView and displayed four apex: outputfields

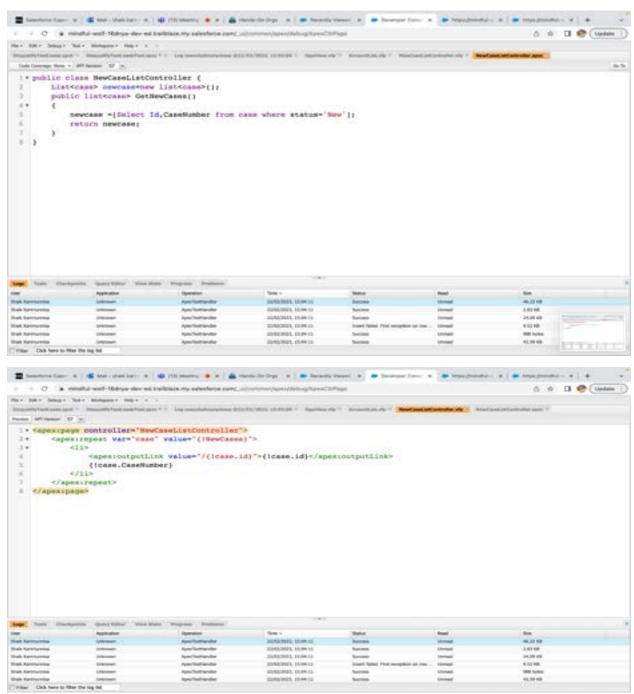


Exercise 17 Created a Visualforce page that shows a list of Accounts linked to their record pages





Created a Visualforce Page that uses an Apex class to display a list of cases with the status of 'New'.





References

- 1. Manage sales Salesforce IN
- 2. Salesforce ADX201 Administrative Essentials for new Admins in Lightning Experience (SFADX201) (qa.com)
- 3. <u>Understand the Salesforce Architecture Unit |</u>
 Salesforce Trailhead