

# **Project Report Template**

## **Implementing CRM for Result tracking of a candidate with internal marks.**

### **1 INTRODUCTION**

#### **1.1 Overview**

Our organization has decided to implement a custom travel approval app. Up until now, you had a travel approval process in place based on emailing spreadsheets. It had no central repository or enforcement of the process, resulting in the inability to report on travel approval activities across the organization. You need to create an application that meets that meets these requirements:

- Each employee must submit an electronic request in the system for future travel.
- Each request includes a list of estimated expenses for airfare, hotel, rental car, and so on.
- Each request must be approved by the employee's manager, and all out-of-state must be approved by a travel coordinator.
- Managers need reports and dashboards to track key travel request trends and KPIs.
- In addition, employees and managers must be able to access their travel requests, approvals, and dashboards via mobile device.

By the end of the project, you'll have a working prototype of the new travel approval application. You start by creating a travel approval app that provides a view of your specific travel-related objects, which you create in the next steps.


#### **1.2 Purpose**

- Improving our working skills and well-being.
- Improving our language skills.
- Learning intercultural competencies.

The achievement of the project is to develop the corporates in profit and develop the skill of the employees. It leads to the company to high level.

## 2 Problem Definition & Design Thinking

### 2.1 Empathy Map



## Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)

### Build empathy

The information you add here should be representative of the observations and research you've done about your users.

**Says**

What have we heard them say?  
What can we imagine them saying?

Date: 16/03/2023  
Team Id: NM2023TMID20587  
Project title: Build A Employee Travel Approval Application For Corporates

Easy To Fill Application

There Is A Opportunity To Learn

To modify our Dressing Code

They Take Carring Well

We Imaging That There Behaviour Should Be Nice

**Thinks**

What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

Changes The Person's perspective

It's use to gain more profit to corporates

It's Improves Overall Health

It is Harmful To Health And Fitness TO Employees

Missing Our Family In Traveling

Ultraviolet Radiation From The Sun In Travelling


Give them a name and a persona to empathize with your persona.

**Does**

What behavior have we observed?  
What can we imagine them doing?


**Feels**

What are their fears, frustrations, and emotions? What other feelings might influence their behavior?

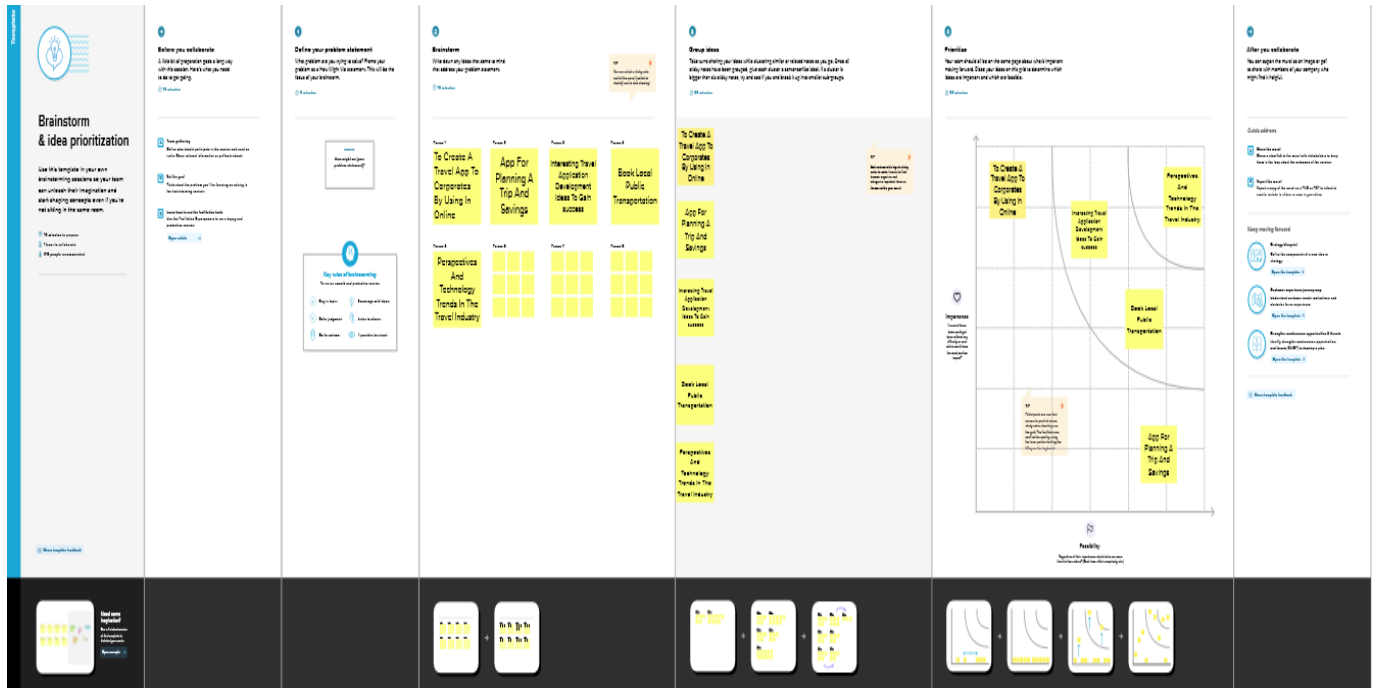


Need some inspiration?  
See a finished version of this template or witness your work.

[Open example](#)



## 2.2 Ideation & Brainstorming Map



## 3 RESULT

### 3.1 Data Model:

Object name	Fields in the Object	
Department	Field Label	Data Type
	Department Field	Text(80)
	Amount	Currency (16,2)
Expense Item	Field Label	Data Type
	Expense Item Field	Text(80)

	Expense Item	Picklist										
Student	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Expense Item</td><td>Text(80)</td></tr><tr><td>Amount</td><td>Currency(16, 2)</td></tr><tr><td>Travel Approval</td><td>Master-detail (Travel Approval)</td></tr><tr><td></td><td></td></tr></table>		Field Label	Data Type	Expense Item	Text(80)	Amount	Currency(16, 2)	Travel Approval	Master-detail (Travel Approval)		
	Field Label	Data Type										
	Expense Item	Text(80)										
	Amount	Currency(16, 2)										
	Travel Approval	Master-detail (Travel Approval)										

	<table> <tr> <th>Field Label</th><th>Data Type</th></tr> <tr> <td>Department Field</td><td>Master-Detail(department)</td></tr> <tr> <td>Destination State</td><td>Text Area(255)</td></tr> <tr> <td>Out of State</td><td>Text Area(255)</td></tr> <tr> <td>Purpose of Trip</td><td>Phone</td></tr> <tr> <td>Status</td><td>Picklist</td></tr> <tr> <td>Status Indicator</td><td>Formula (Text)</td></tr> <tr> <td>Total Expenses</td><td>Roll-Up Summary (SUM student)</td></tr> <tr> <td>Travel Approval #</td><td>Auto Number</td></tr> <tr> <td>Trip End Date</td><td>Date</td></tr> <tr> <td>Trip Start Date</td><td>Date</td></tr> </table>	Field Label	Data Type	Department Field	Master-Detail(department)	Destination State	Text Area(255)	Out of State	Text Area(255)	Purpose of Trip	Phone	Status	Picklist	Status Indicator	Formula (Text)	Total Expenses	Roll-Up Summary (SUM student)	Travel Approval #	Auto Number	Trip End Date	Date	Trip Start Date	Date
Field Label	Data Type																						
Department Field	Master-Detail(department)																						
Destination State	Text Area(255)																						
Out of State	Text Area(255)																						
Purpose of Trip	Phone																						
Status	Picklist																						
Status Indicator	Formula (Text)																						
Total Expenses	Roll-Up Summary (SUM student)																						
Travel Approval #	Auto Number																						
Trip End Date	Date																						
Trip Start Date	Date																						

### **Milestone 1-Create Salesforce Org:**

#### **Activity: 1 Create Developer Account**

**Setup** Home Object Manager

Search Setup

Lightning Usage

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

Storage Usage

Apps

Connected Apps

Connected Apps OAuth

**Users**

**User Detail** Edit Sharing Change Password

Name	Ayyan B	Role	CEO
Alias	AB	User License	Salesforce
Email	ayyandevyanb@gmail.com	Profile	System Administrator
Username	ayyan@gas.com	Active	<input checked="" type="checkbox"/>
Nickname	User16818864697945861605	Marketing User	<input checked="" type="checkbox"/>
Title		Offline User	<input checked="" type="checkbox"/>
Company	Government arts and science college rishivandiyam	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input checked="" type="checkbox"/>
Address	IN	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input checked="" type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>

## Activity:2 Account Activation

**Setup** Home Object Manager

Search Setup

Lightning Usage

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

Storage Usage

Apps

Connected Apps

Connected Apps OAuth

**Get Started with Einstein Bots**  
Launch an AI-powered bot to automate your digital connections.  
[Get Started](#)

**Mobile Publisher**  
Use the Mobile Publisher to create your own branded mobile app.  
[Learn More](#)

**Real-time Collaborative Docs**  
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.  
[Get Started](#)

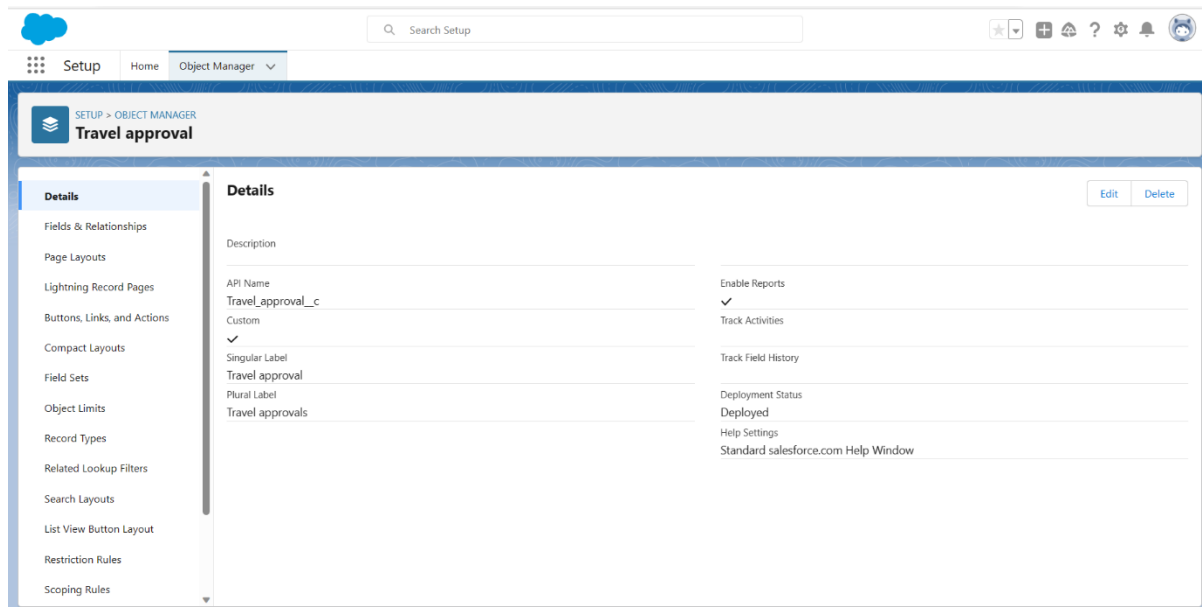
**Most Recently Used**  
10 items

NAME	TYPE	OBJECT
Ayyan B	User	
Purpose of Trip field	Custom Field Definition	Travel Approval

## Milestone 2-Create the Application:

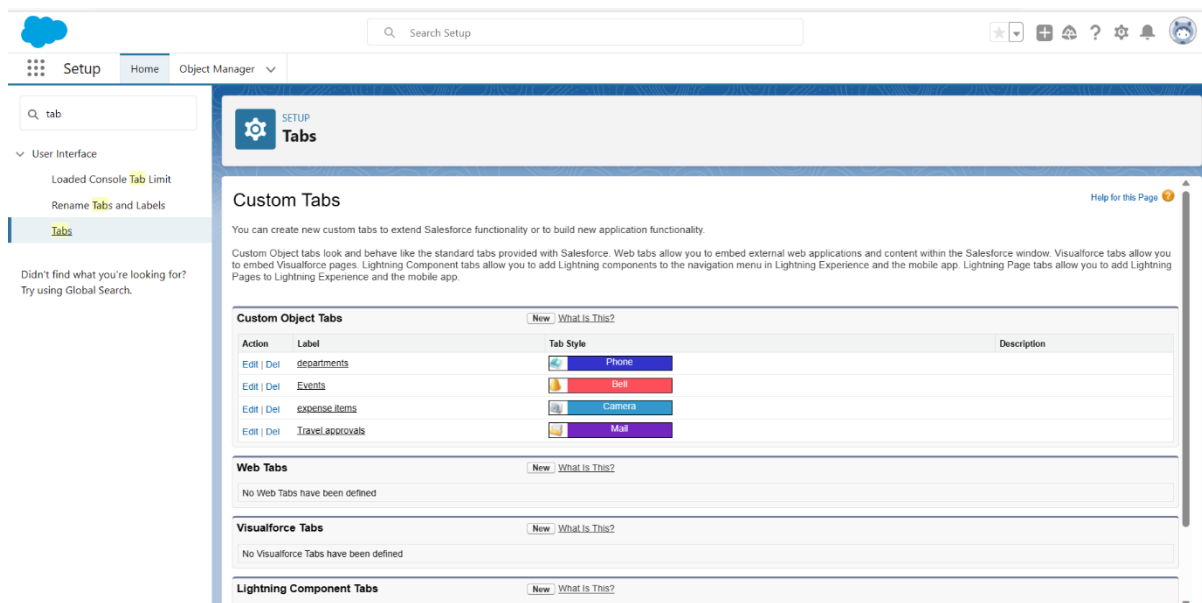
### Activity-1: Create the Application





## Milestone 4-what is a Tab?

### Activity:1 Create A Custom Tab



## Milestone 4-Create-Fields & Relationships:

### Activity:1 Create Fields & Relationships



Cloud logo | Search Setup | Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
**Student**

Details | **Fields & Relationships** | Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Student Name	Name	Text(80)		✓
Travel approval	Travel_approval__c	Master-Detail(Travel approval)		✓

Fields & Relationships sidebar: 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, Restriction Rules, Scoping Rules

## Activity: 2

### Create Expense Type Field

Cloud logo | Search Setup | Setup | Home | Object Manager

SETUP > OBJECT MANAGER  
**expense item**

Details | **Fields & Relationships** | Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

5 Items, Sorted by Field Label

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

Fields & Relationships sidebar: 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, Restriction Rules, Scoping Rules

## Activity: 3

### Create Approval Field

salesforce login - Search x Travel approval | Salesforce x +

https://thirukolaniappargoveme13-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kGfE/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Travel approval

Details

**Fields & Relationships**

12 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)		
department	department__c	Master-Detail(department)		✓
Destination State	Destination_State__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Out Of State	Out_Of_State__c	Text Area(255)		
Purpose of Trip field	Purpose_of_Trip_field__c	Phone		
status	status__c	Picklist		

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts

## Activity: 3.1

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Travel approval

Details

**Fields & Relationships**

12 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Destination State	Destination_State__c	Text Area(255)	
Last Modified By	LastModifiedById	Lookup(User)	
Out Of State	Out_Of_State__c	Text Area(255)	
Purpose of Trip field	Purpose_of_Trip_field__c	Phone	
status	status__c	Picklist	
Status Indicator	Status_Indicator__c	Formula (Text)	
Total Expenses	Total_Expenses__c	Roll-Up Summary (SUM Student)	
travel approval Name	Name	Auto Number	✓
Trip End Date	Trip_End_Date__c	Date	
Trip Start Date	Trip_Start_Date__c	Date	

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  
Restriction Rules  
Scoping Rules

## Milestone 5-Import Departments:

### Activity: 1

### Import Departments

The screenshot shows the Salesforce Data Import Wizard. At the top, there's a search bar and navigation tabs for Setup, Home, and Object Manager. Below the navigation bar, the page title is "Data Import Wizard" with a "Help for this page" link. A section titled "Recent Import Jobs" contains a table with columns: Status, Object, Records Created, Records Updated, Records Failed, Start Date, and Processing Time (ms). The table shows one job with status "Closed", object "department", 0 records created, 0 records updated, 16 records failed, start date "04-12-2023 04:09", and processing time "61". Below the table is a "Bulk Api Monitoring" button. A large blue box contains instructions for data import, including a "Clean up your data import file" section with a video link, a "Make sure your field names match Salesforce field names" section with a link to view a list of Salesforce data fields, and a "Don't import too many records at once" section with a link to view a list of Salesforce data fields. At the bottom, there's a section titled "Import your data in 3 easy steps!" with a link to "Launch the Data Import Wizard to import your data."

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	department	0	0	16	04-12-2023 04:09	61

## Milestone 6-Custmize User Interface:

### Activity: 1 Create User Setup Approvals

The screenshot shows the Salesforce Users page in Setup. The left sidebar contains a "Quick Find" search bar and a list of navigation items: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users, Permission Set Groups, Permission Sets, Profiles, and Public Groups. The main content area is titled "Users" and "All Users". It includes a "Help for this Page" link and a description: "On this page you can create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android". Below the description is a "View: All Users" dropdown and a "Create New View" link. A table lists users with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains four rows of user data. At the bottom of the table are buttons for "New User", "Reset Password(s)", and "Add Multiple Users".

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	B. Avyan	AB	avyan@qas.com	CEQ	✓	System Administrator
<a href="#">Edit</a>	Chatter Expert	Chatter	chattv.00d500000cicjeax.vxupsdfvzdt@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	User Integration	inteq	integration@00d500000cicjeax.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightsecurity@00d500000cicjeax.com		✓	Analytics Cloud Security User

## Milestone 7-Use Customization:

### Activity: 1Customize Approval Object Page Layout

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The 'Travel approval' object is chosen, and the 'Page Layouts' section is active. The 'Travel approval Layout' is being edited. The layout includes a 'Highlights Panel' and 'Quick Actions in the Salesforce Classic Publisher'. The 'Fields' section shows a table of fields:

Field Name	Field Name	Field Name	Field Name
Section	Destination State	status	Trip End Date
Blank Space	Last Modified By	Status Indicator	Trip Start Date
Created By	Out Of State	Total Expenses	
department	Purpose of Trip L...	travel approval ...	

## Milestone 8-Add Business Logic to App:

### Activity: 1 Create Validation Rule

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The 'Travel Approval' object is chosen, and the 'Validation Rules' section is active. The 'Travel Approval Validation Rule' is being edited. The rule details are as follows:

Validation Rule Detail		Active
Rule Name	Validation_Rule	<input checked="" type="checkbox"/>
Error Condition Formula	Trip_End_Date__c < Trip_Start_Date__c	
Error Message	Trip_End_Date__c < Trip_Start_Date__c	Error Location: Top of Page
Description		
Created By	Alyssa B. 19/04/2023, 11:01 pm	Modified By: Alyssa B. 19/04/2023, 11:01 pm

### Activity: 2

### Create Rollup Summary Fields

Setup Home Object Manager

Travel Approval

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

Travel Approval Custom Field

Total Expense

Back to Travel Approval

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Total Expense	Object Name	Travel Approval
Field Name	Total_Expense		
API Name	Total_Expense__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Ayyan B. 19/04/2023, 11:12 pm	Modified By	Ayyan B. 19/04/2023, 11:12 pm

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	SUM
Summarized Object	Student		

## Activity:3

### Create Formula Fields

Setup Home Object Manager

Static Resources

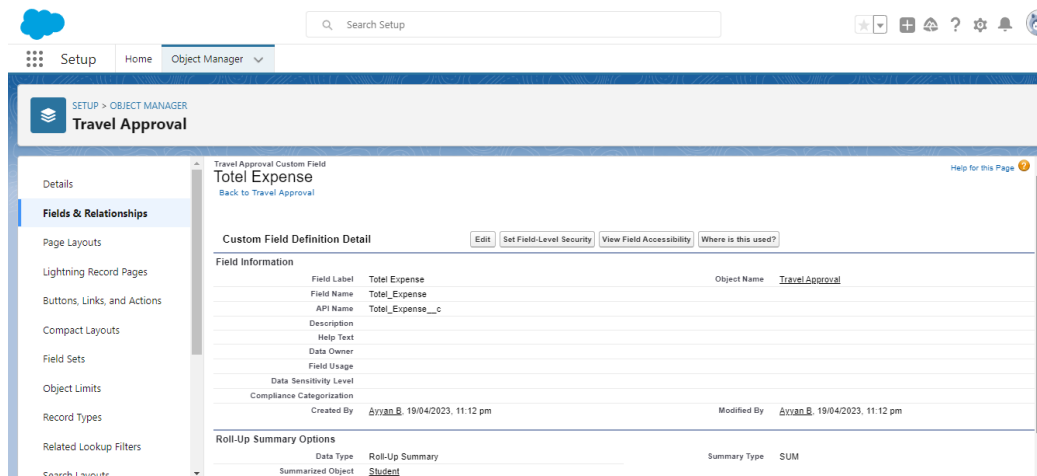
Static Resources

Use static resources to upload content that you want to reference in a Visualforce page, including .zip and .jar files, images, stylesheets, JavaScript, and other files.

View: All Create New View

Action	Name	Namespace Prefix	Description	MIME Type	Size	Created By Alias	Created Date	Last Modified Date	Cache Control
Edit / Del	StatusImage			application/x-zip-compressed	39,130 B		05/04/2023	05/04/2023, 10:22 pm	Private

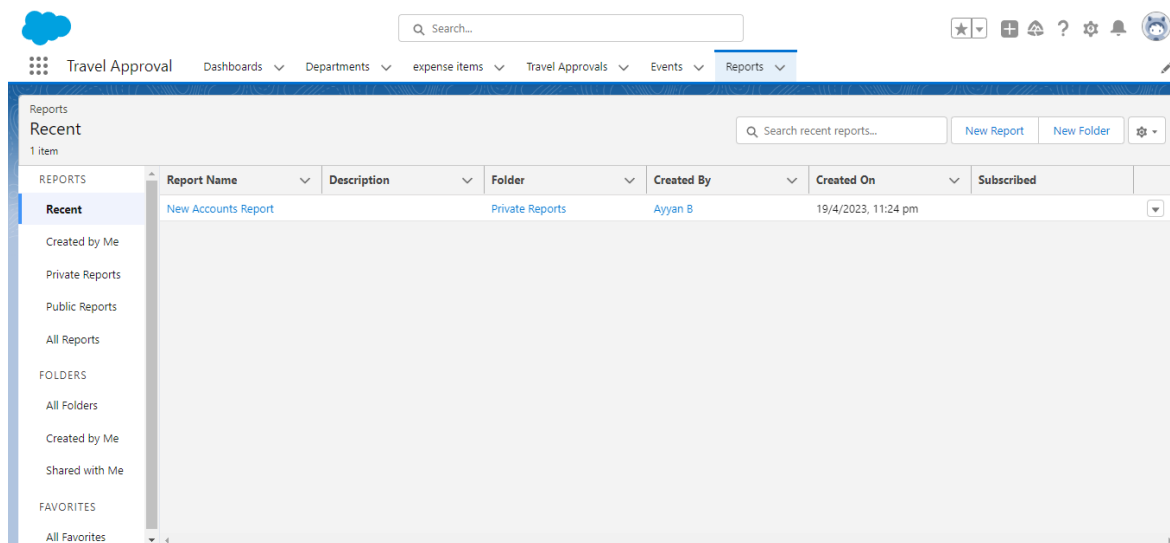
### Create Status Indicator Field



## Milestone 10-What are Reports?

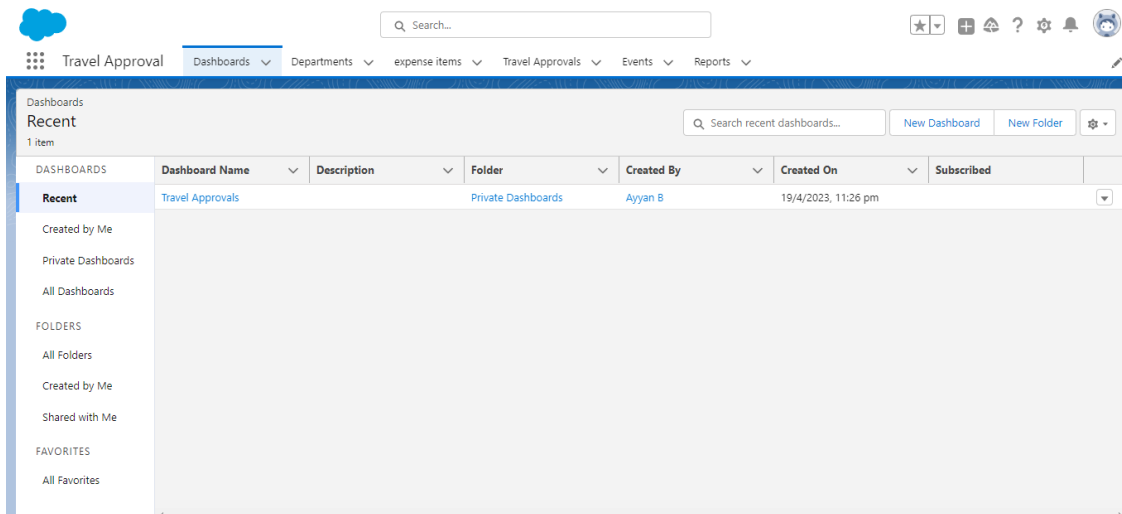
**Activity:**

**Add Report**



## Milestone 11-Dashboards:

**Activity: Create Approvals Dashboard**



#### **4. Trailhead Profile Public URL**

**Team Lead –KAVIYA S**

<http://trailblazer.me/id/ksakthivel8>

**Team Member 1 – GNANASEKAR J**

**Team Member 2 – GOPI A**

<https://trailblazer.me/id/ggopi59>

**Team Member 3 –GOVINDHAN A**

**Team Member 4 – MAGWARIESH B**

#### **5. ADVANTAGES & DISADVANTAGE**

**Advantage:**

1. Business travel is great way to develop new skill, confident, speaking, adaptability, time management and networking
2. To achieve a peace of mind and make memories. Then we can understand our self.
3. Traveling allows us to meet people of different cultures with diverse traditions and distinctive lifestyles. This is also good for breaking the monotony of the work because meeting with new people.
4. Finding a new place and exploring the places is the central part of business travel. It helps the employees to develop the knowledge to do business operation.
5. This also gives an impact on the productivity and growth of the organization.

### **Disadvantage:**

1. 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.
2. So it is evident that business travel is dependent on the tremendous amount of money of the organization. Sometimes it creates difficulty for the small startup business organization.
3. This is the principal disadvantage of business travel, and frequent traveling can be responsible for creating significant health problems for employee.
4. Because of this employees cannot concentrate on their work, which affects the organization's productivity.
5. Consuming unhealthy food constantly can create health problems for employees. Then it will be stressful for us or staff members.

## **6. APPLICATION**

- Sample application natural one, its focus is to show natural one functionality rather than being a full-fledged for travel.
- The Travel Support System (TSS) allows us to request and approve business trips.
- Flights hostels and even more external information such as cell phone expenses or car rentals can be entered with the trip request.
- A manager can do both, request own trips as well as approve trips that have been request by employees.
- After the manager has approved single or multiple requested, the manager can print an itinerary or receive the itinerary has a file.

## **7. CONCLUSION**



It is a great opportunities to learn salesforce in the topic of a Build an Employee Travel Approval Application for Corporates. In that travel for employee in a company is useful to learn and gain more knowledge. It is also useful to corporates by earning the profit nearly 20% to 50% of profit to companies.

It is useful to report by the phone immediately and give explanation for corporates or company.

## **8. FUTURE SCOPE**

Travel industry is improving futuristic by including new travel trends in its ecosystem making it more feasible for the public.