

BUILD AN EMPLOYEE TRAVEL APPROVAL

APPLICATION FOR CORPORATES

1. INTRODUCTION

1.1 Overview

companies need to travel to meet clients, attend conferences and meetings, and explore new markets. However, managing employee travel can be a cumbersome task for the HR and travel departments. That's why many corporates have started using employee travel approval applications to streamline the process.

1.2 Purpose

The application saves time for both the employee and the travel manager by automating the travel request and approval process. The application ensures that travel requests comply with the company's travel policies, which reduces the risk of non-compliant expenses and unnecessary travel.

2. Problem Definition & Design Thinking

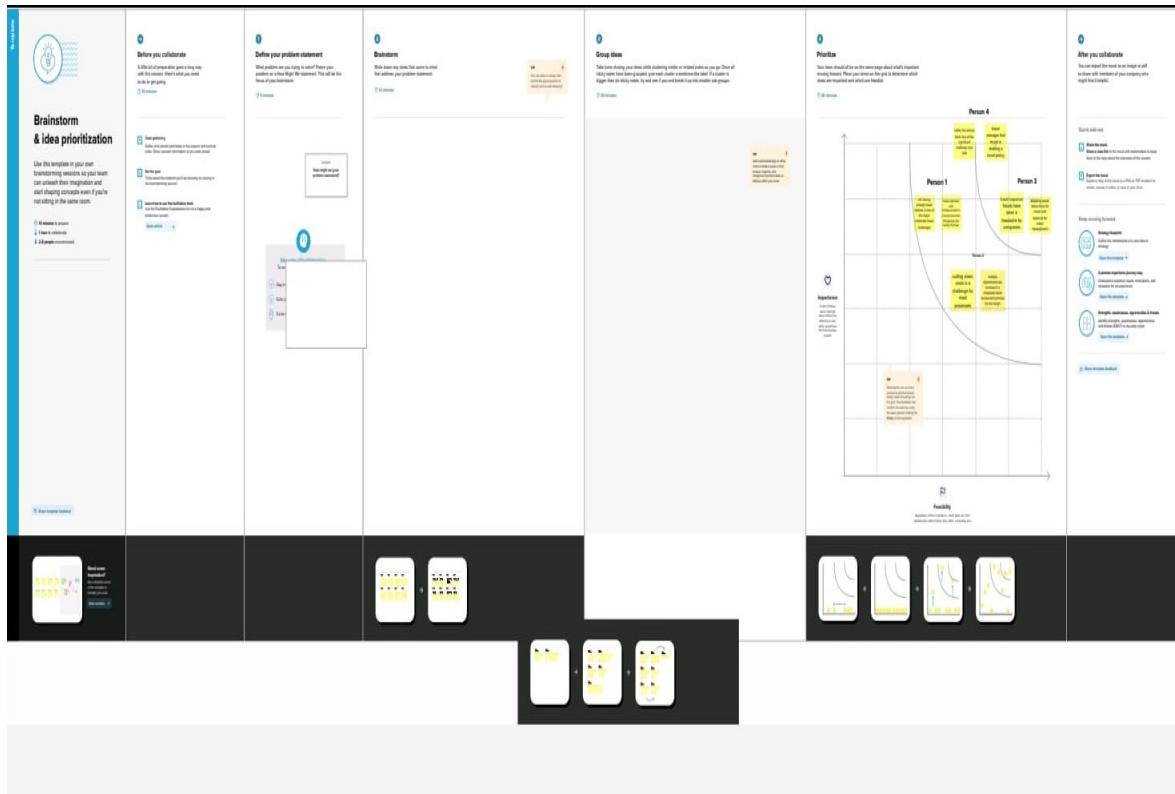
2.1 EMPATHY MAP



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2.2 IDEATION & BRAINSTORMING MAP



3. RESULT

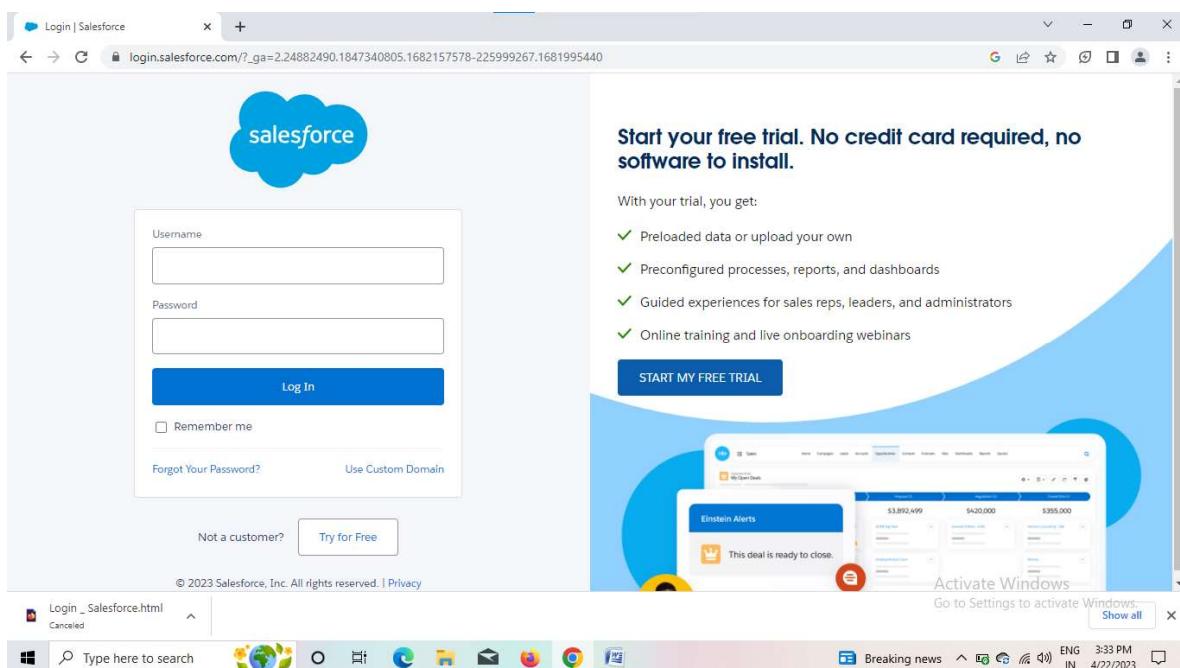
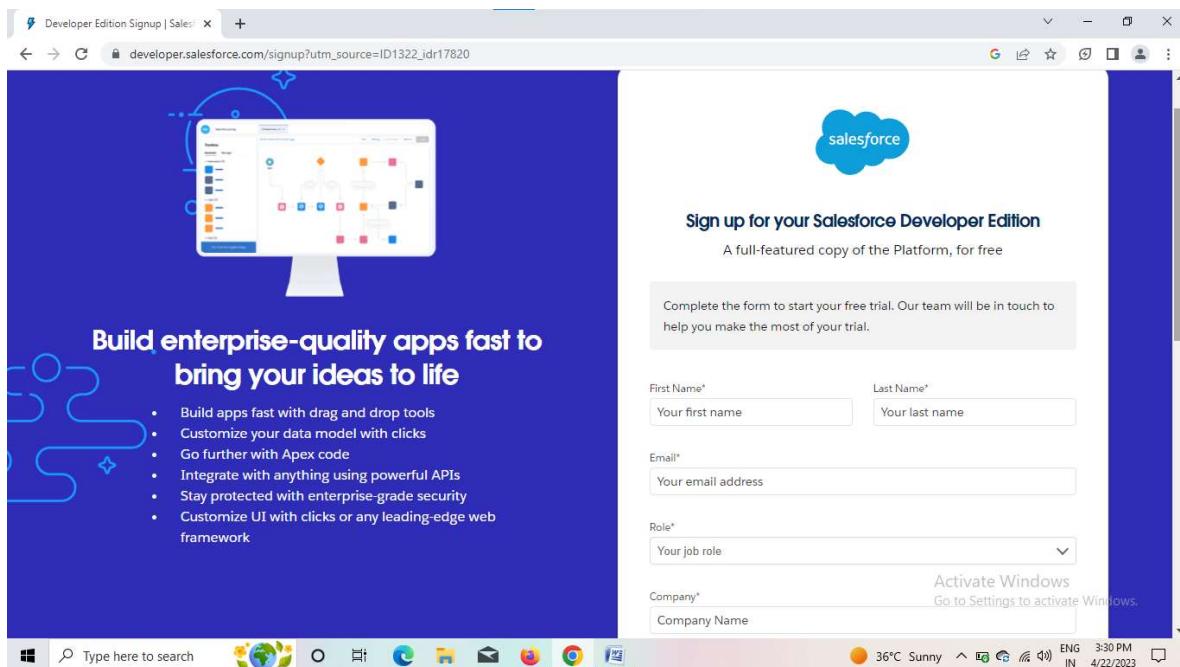
3.1 Data Model:

Object name	Fields in the Object	
Custom Object	Field label	Data type
	Student	Student_c
	Amount	Currency(16,2)
Travel Approval Object	Field label	Data type
	Total expenses	Roll-Up Summary

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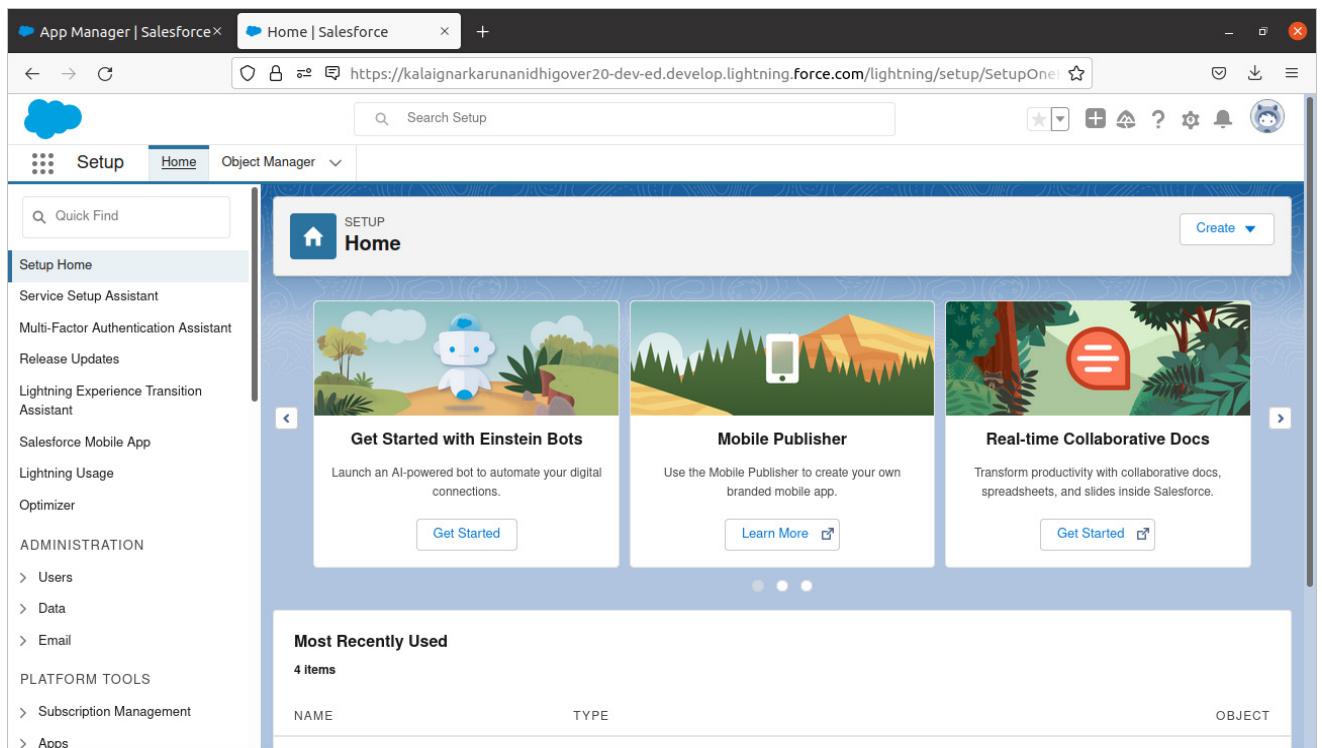
3.2 Activity & Screenshot :

Create Salesforce Org :

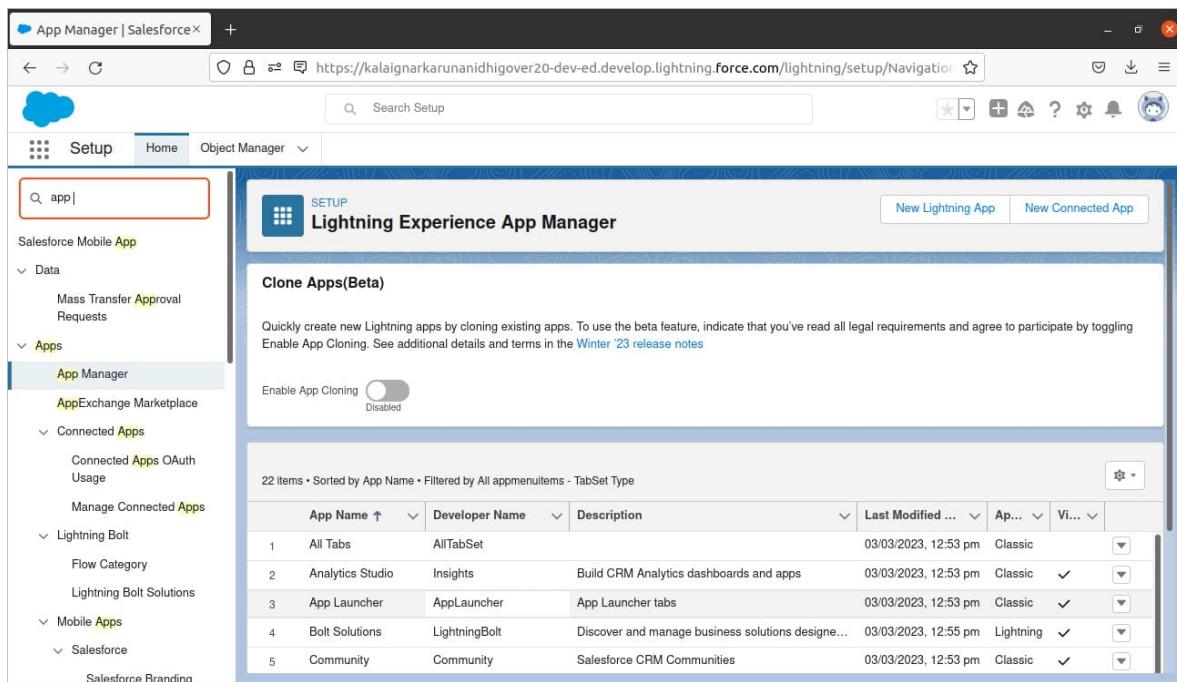


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Creating the Application :



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New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name: travel approval

* Developer Name: travel_approval

Description: Enter a description...

App Branding

Image:

Primary Color Hex Value: #0070D2

Org Theme Options

Next

File Edit View History Bookmarks Tools Help

App Manager | Salesforce

https://kalaignarkarunanidhigover20-dev-ed.develop.lightning.force.com/lightning/setup/NavigationAppBuilder

Search Setup

Salesforce Data Model Reports Apps Communities Lightning Bolt Solutions LightningBolt Discover and manage business solutions designed... 03/03/2023, 12:55 pm Lightning

Mobile Apps

New Lightning App

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

das

Selected Items

Dashboards

Back Next

File Edit View History Bookmarks Tools Help

App Manager | Salesforce

https://kalaignarkarunanidhigover20-dev-ed.develop.lightning.force.com/lightning/setup/NavigationAppBuilder

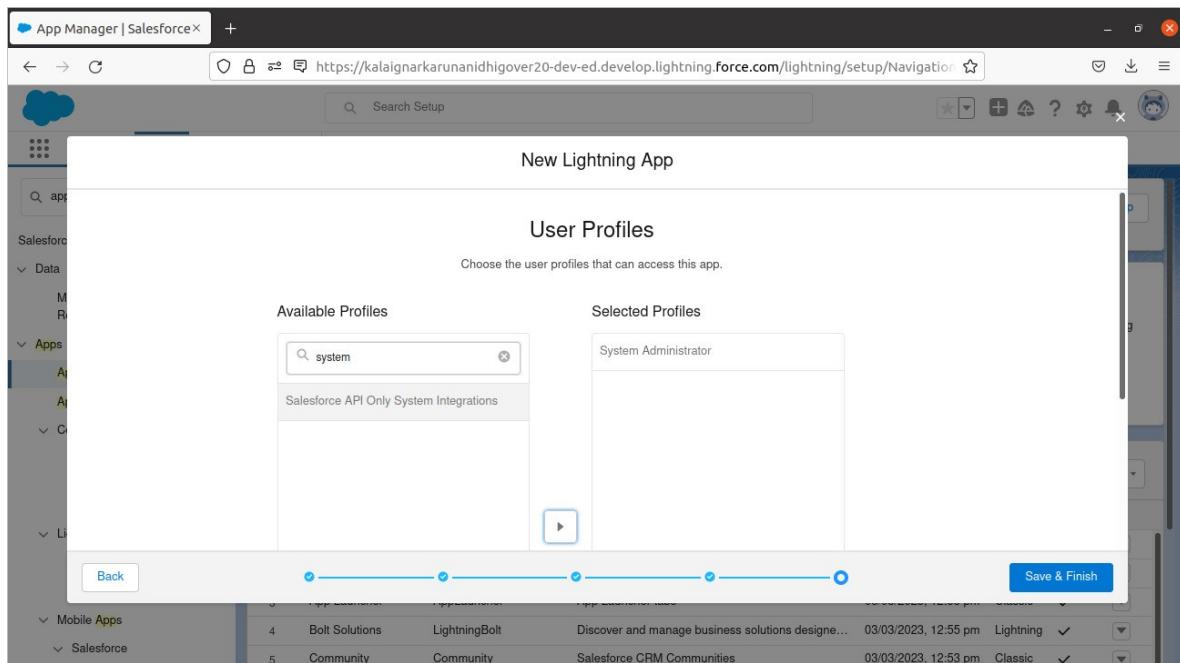
Search Setup

Salesforce Data Model Reports Apps Communities Lightning Bolt Solutions LightningBolt Discover and manage business solutions designed... 03/03/2023, 12:53 pm Classic

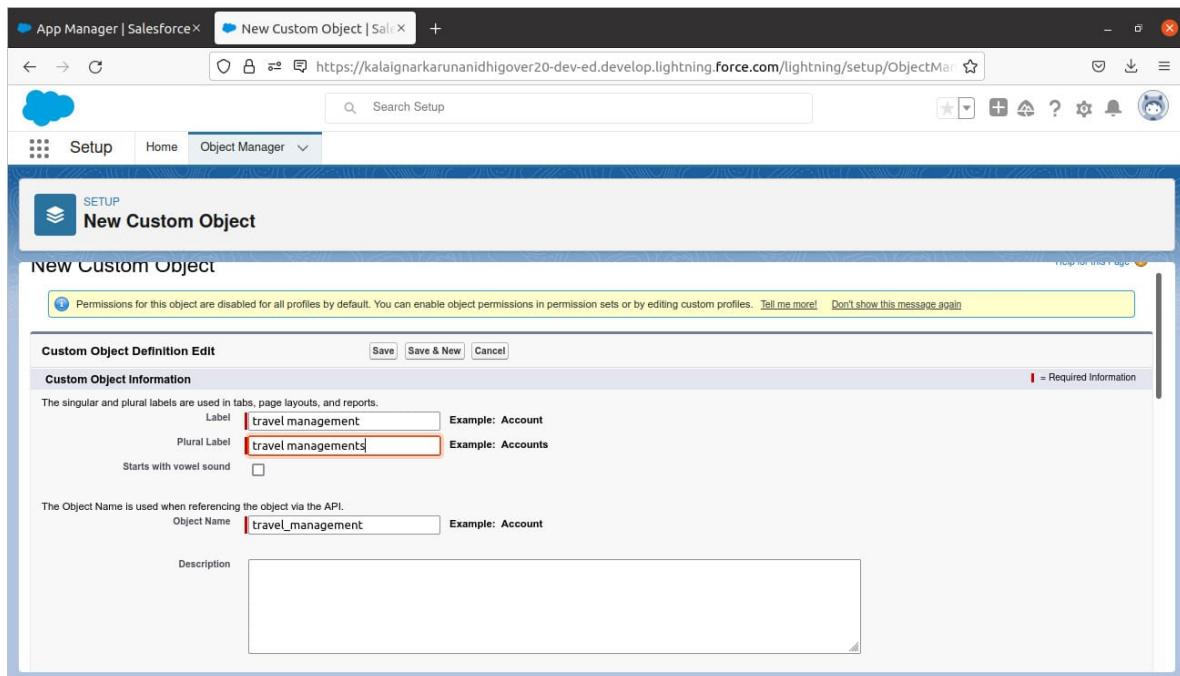
Mobile Apps

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What is an object?



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App Manager | Salesforce New Custom Object | Sales... +

https://kalaignarkarunanidhigover20-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager

Setup Home Object Manager

SETUP New Custom Object

Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status
 In Development
 Deployed

Search Status
When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

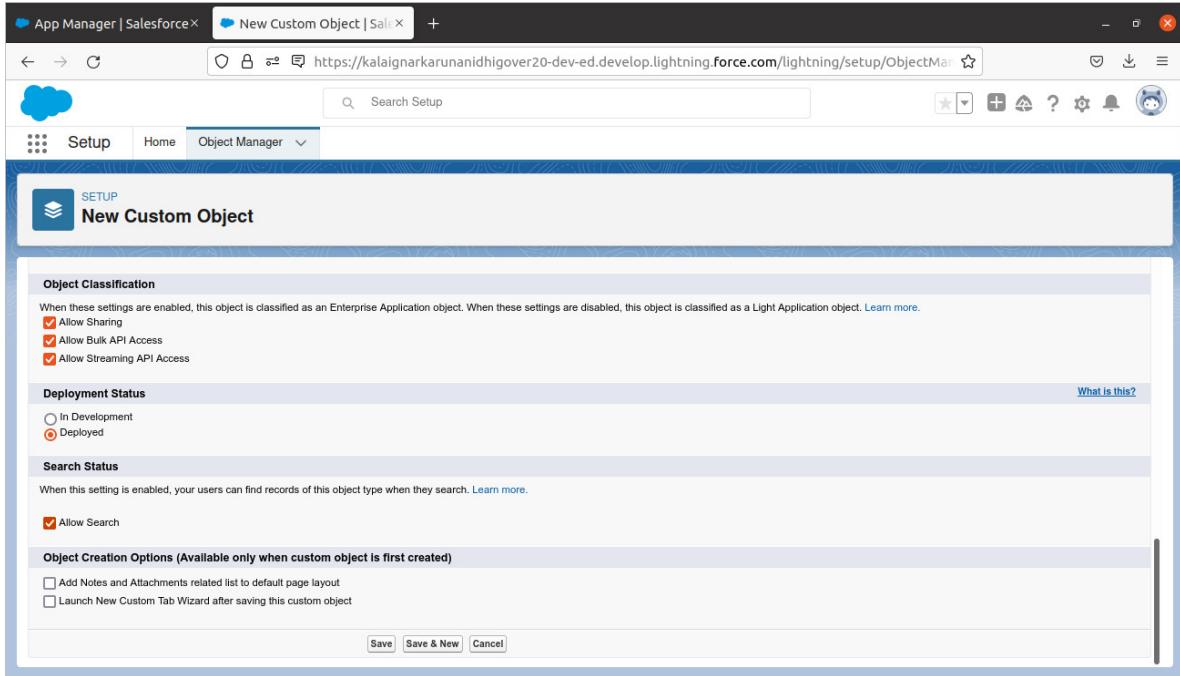
Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

Buttons

Save Save & New Cancel



New Custom Object | Sales... WhatsApp Guided Projects +

https://kalaignarkarunanidhigover20-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager

Setup Home Object Manager

SETUP New Custom Object

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Example: Account
Plural Label: Example: Accounts
Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

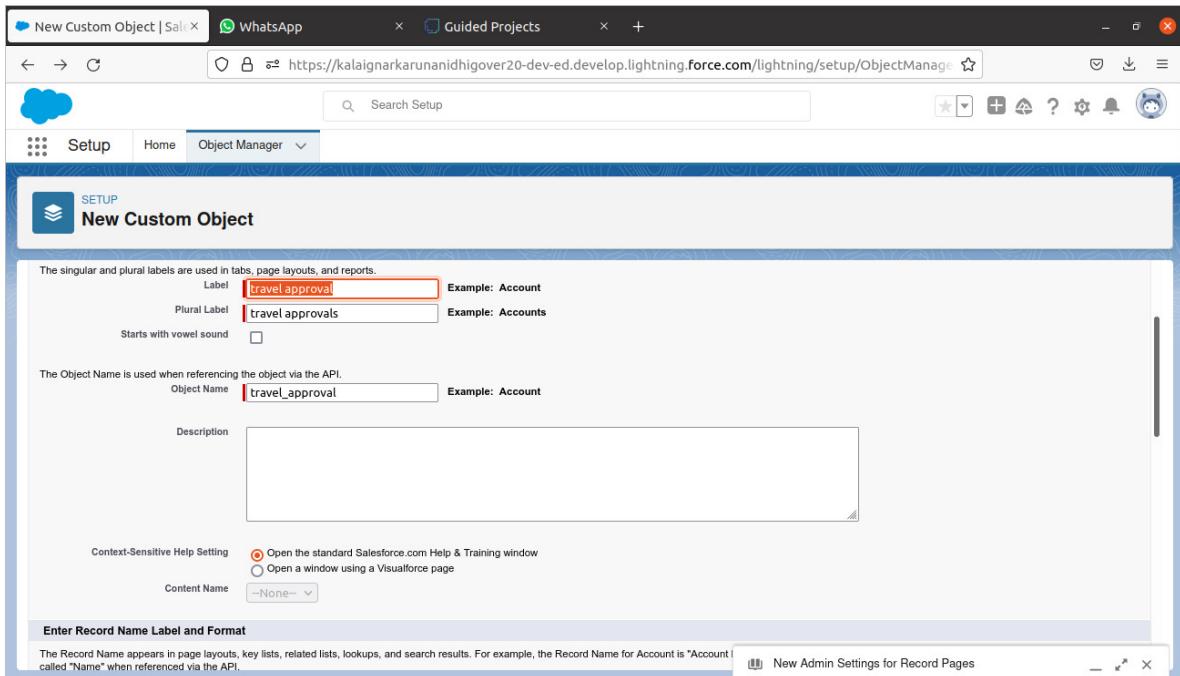
Description:

Context-Sensitive Help Setting
 Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account" called "Name" when referenced via the API.

New Admin Settings for Record Pages



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The screenshot shows the Salesforce Setup interface with the title "New Custom Object". The "Object Name" field is set to "travel_approval". The "Record Name" field is set to "travel approval Name". The "Data Type" is "Auto Number" and the "Display Format" is "TA-{00000} What Is This?". The "Starting Number" is set to 1.

What is Tab ?

The screenshot shows the Salesforce Setup interface with the title "Tabs". It lists several user profiles and their tab settings:

User Profile	Default On
Marketing User	Default On
Minimum Access - Salesforce	Default On
Partner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Salesforce API Only System Integrations	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

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The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. A search bar at the top left shows 'tabs'. The main content area is titled 'SETUP Tabs' and lists various standard tabs with checkboxes. Most checkboxes are checked, except for 'travel approval (travel_approval)'. A note below the list says 'Didn't find what you're looking for? Try using Global Search.' At the bottom right are 'Previous', 'Save', and 'Cancel' buttons.

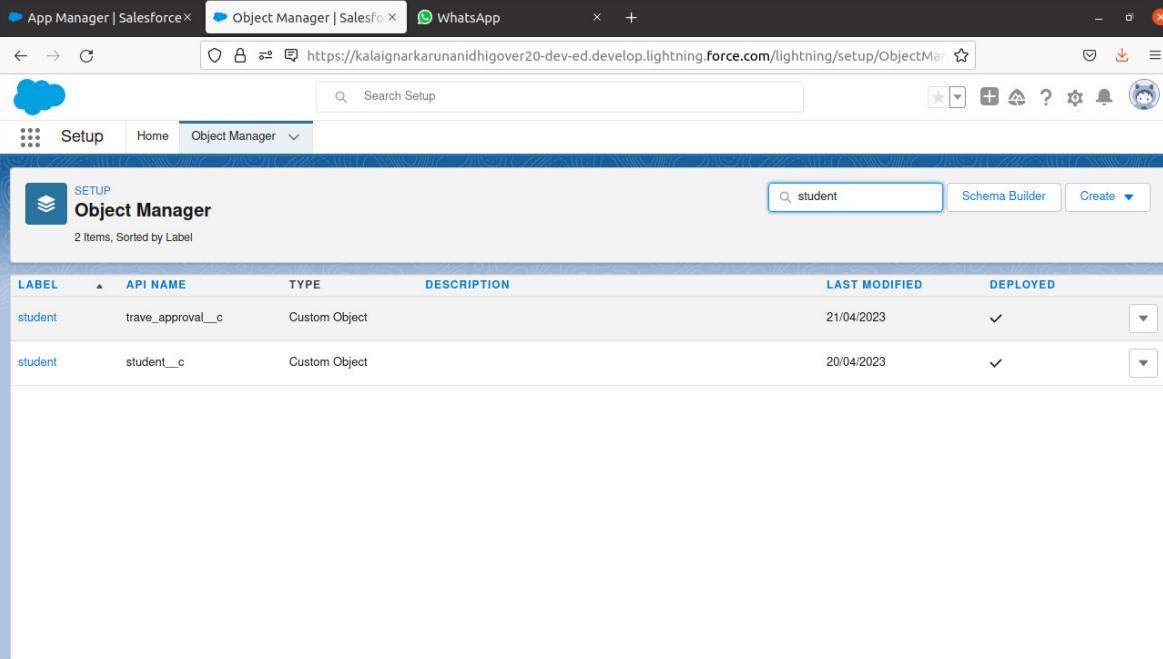
Tab Name	Status
Analytics Studio (standard__Insights)	✓
Sales Console (standard__LightningSalesConsole)	✓
Service Console (standard__LightningService)	✓
Sales (standard__LightningSales)	✓
Lightning Usage App (standard__LightningInstrumentation)	✓
Digital Experiences (standard__SalesforceCMS)	✓
Queue Management (standard__QueueManagement)	✓
Data Manager (standard__DataManager)	✓
Subscription Management (standard__RevenueCloudConsole)	✓
Salesforce Scheduler Setup (standard__LightningScheduler)	✓
Bolt Solutions (standard__LightningBolt)	✓
travel approval (travel_approval)	✗

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under 'User Interface'. A search bar at the top left shows 'tabs'. The main content area is titled 'SETUP Tabs' and displays a form for creating a new custom tab. It asks to choose a custom object, with 'travel management' selected in the dropdown. Below that, it asks for a 'Tab Style' and shows a color swatch. An optional section for a 'Splash Page Custom Link' is set to 'None'. A text input field for 'Description' is empty. At the bottom right are 'Next' and 'Cancel' buttons.

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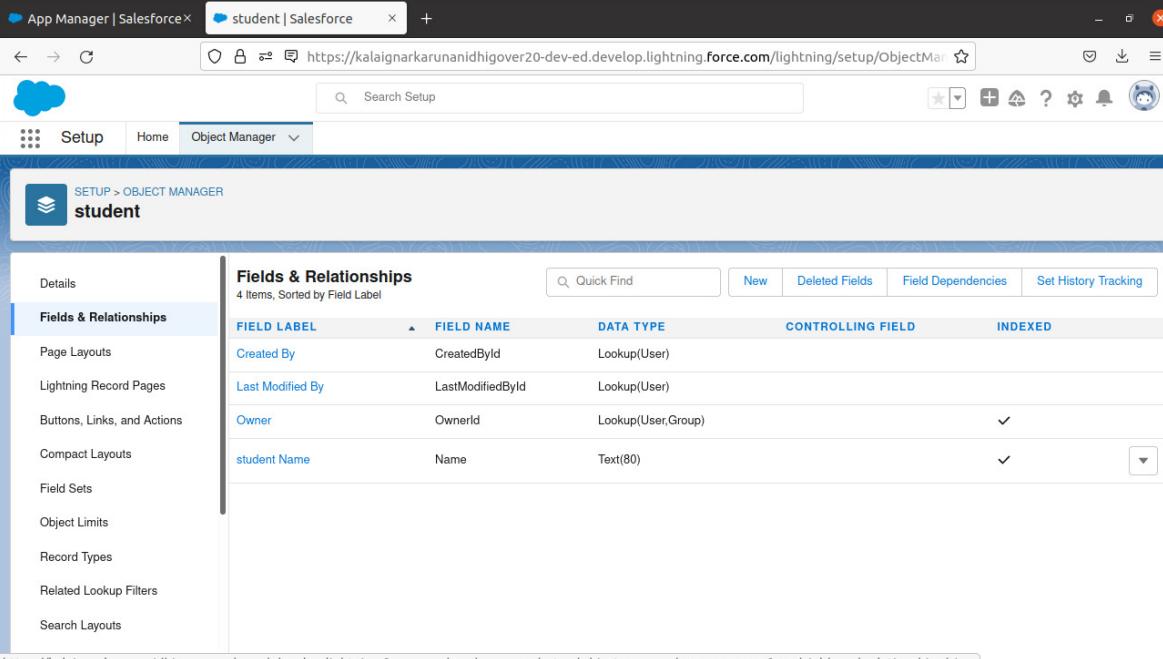
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Create - Fields & Relationships :



The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for App Manager, Object Manager, and WhatsApp. The URL in the address bar is https://kalaignarkarunanidhigover20-dev-ed.lightning.force.com/lightning/setup/ObjectManager. The main area is titled "Object Manager" with a subtitle "2 Items, Sorted by Label". A search bar contains the text "student". Below the search bar are buttons for Schema Builder and Create. A table lists two items:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
student	trave_approval__c	Custom Object		21/04/2023	✓
student	student__c	Custom Object		20/04/2023	✓



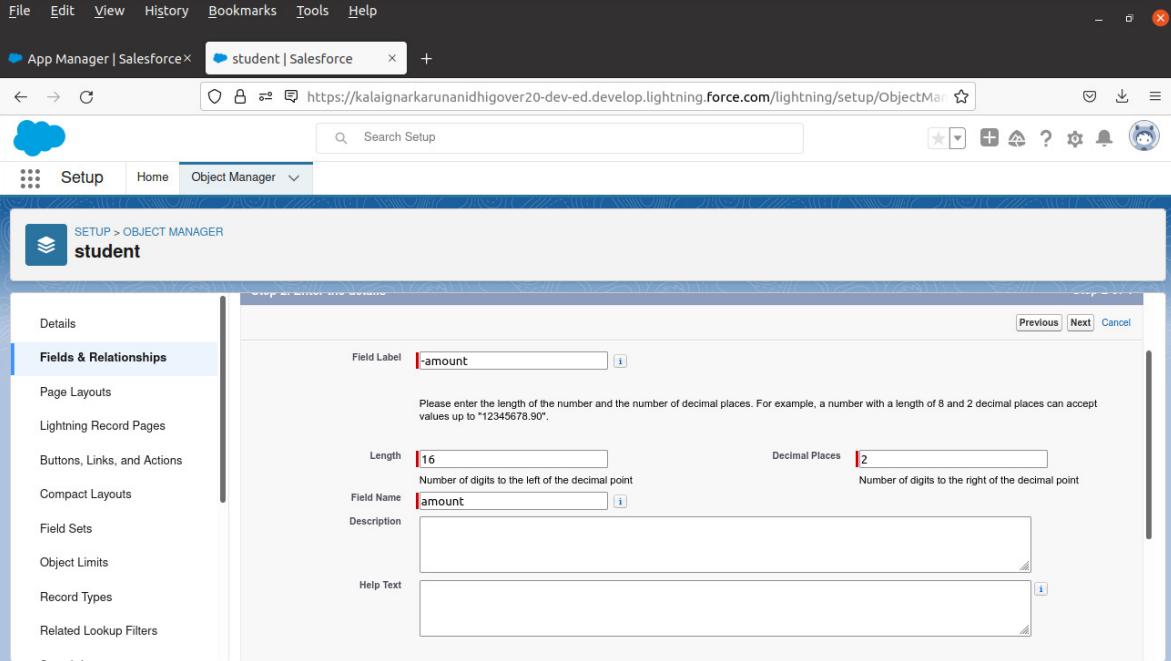
The screenshot shows the Salesforce Object Manager interface for the "student" object. The URL in the address bar is https://kalaignarkarunanidhigover20-dev-ed.lightning.force.com/lightning/setup/ObjectManager/student. The main area is titled "student" with a subtitle "4 Items, Sorted by Field Label". On the left, a sidebar lists various setup categories: Details, Fields & Relationships (which is 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 "Fields & Relationships" section has a table with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)	✓	
student Name	Name	Text(80)	✓	

At the bottom of the page, the URL is https://kalaignarkarunanidhigover20-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager/01iw000004EfWM/FieldsAndRelationships/view.

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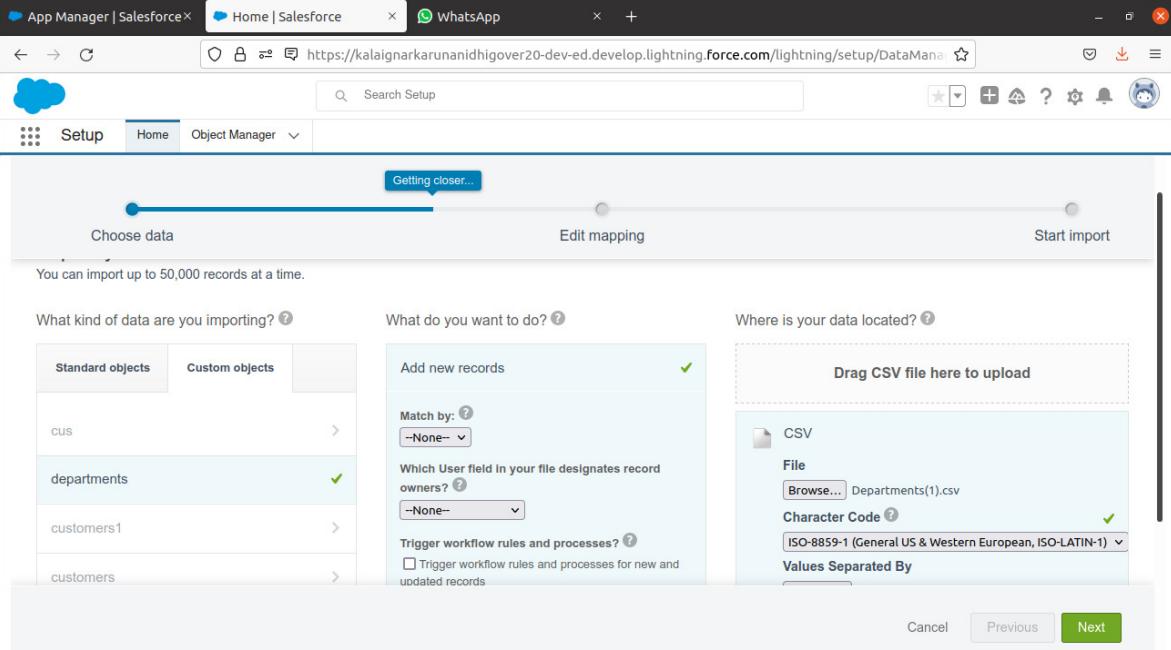
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The screenshot shows the Salesforce Setup interface in the Object Manager. A new field is being created with the following details:

- Field Label:** amount
- Length:** 16
- Decimal Places:** 2
- Field Name:** amount
- Description:** (empty)
- Help Text:** (empty)

Import Departments :



The screenshot shows the Data Import Wizard in progress, currently at the "Choose data" step. The process is indicated by a progress bar at the top.

Choose data **Getting closer...** **Edit mapping** **Start import**

You can import up to 50,000 records at a time.

What kind of data are you importing? Standard objects
CUS
departments
customers1
customers

What do you want to do? Add new records
Match by: -None-
Which User field in your file designates record owners? -None-
Trigger workflow rules and processes?
 Trigger workflow rules and processes for new and updated records

Where is your data located?
Drag CSV file here to upload
CSV
File
Browse... Departments(1).csv
Character Code ISO-8859-1 (General US & Western European, ISO-LATIN-1)
Values Separated By

Cancel Previous Next

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The screenshot shows the Salesforce Data Importer interface. At the top, there's a progress bar with three steps: 'Choose data' (blue), 'Edit mapping' (green), and 'Start import' (grey). A blue callout bubble above the second step says 'Almost done'. Below the progress bar, the title 'Edit Field Mapping: departments' is displayed. A note below it states: 'Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.' A table titled 'CSV Header' shows the mapping between CSV columns and Salesforce fields:

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	department Name	Department Name	Audit Service	Contract Man	Division of Finance
Map	Unmapped ⓘ	Department Code	405-01	405-02	405-03

At the bottom right of the mapping screen, there are 'Cancel', 'Previous', and 'Next' buttons. The URL in the browser address bar is <https://kalaignarkarunanidhigover20-dev-ed.develop.lightning.force.com/lightning/setup/DataManager>.

The screenshot shows the 'Review & Start Import' step of the Data Importer. On the left, a sidebar lists 'Your selections:' including 'departments' (checked), 'Add new records' (checked), and 'Departments(1).csv' (checked). The main area displays a confirmation message in a modal window:

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.

At the bottom right of the modal is a green 'OK' button. The background of the main screen shows the 'Edit mapping' step with a greyed-out progress bar. The URL in the browser address bar is <https://kalaignarkarunanidhigover20-dev-ed.develop.lightning.force.com/datalimporter/datalimporter.app#>.

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Customize User Interface :

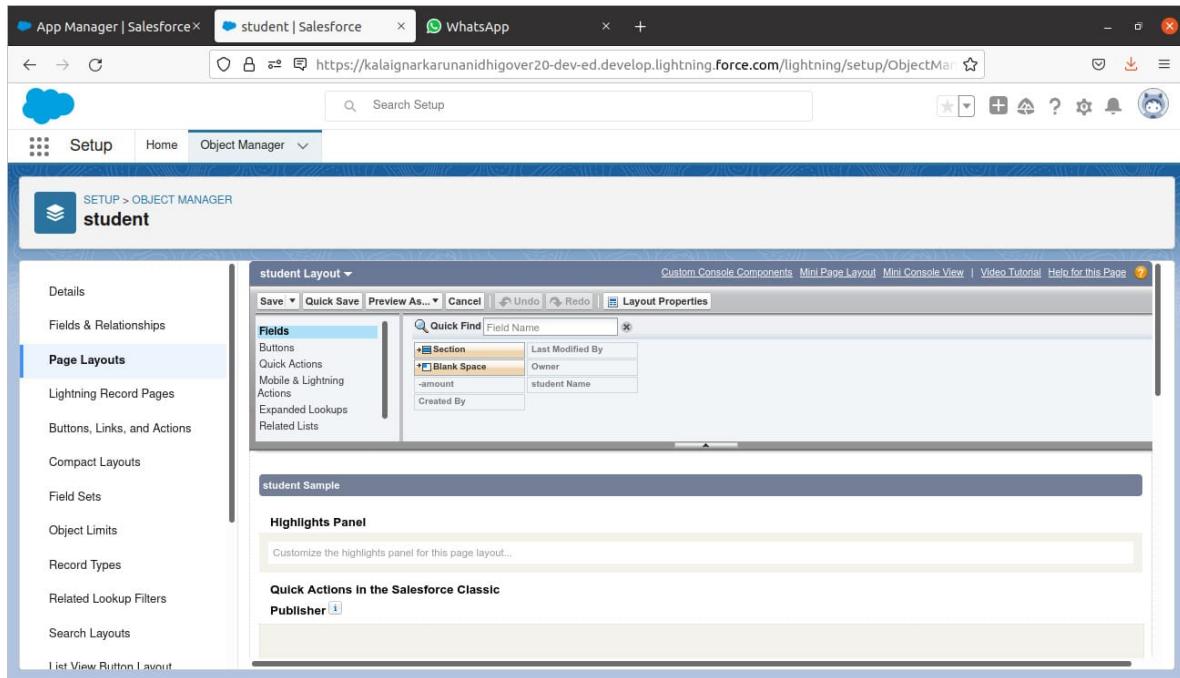
The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing sections like App Manager, Users, and Object Manager. Under the Users section, 'User Management Settings' is selected, and 'Users' is also highlighted. The main content area displays the 'User Detail' for a user named 'kayal@vizhi sakthi'. The user's details include Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Role (CEO), User License (Force.com - Free), Profile (Force.com - Free User), Active status (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Mobile Push Registrations.

Use customization :

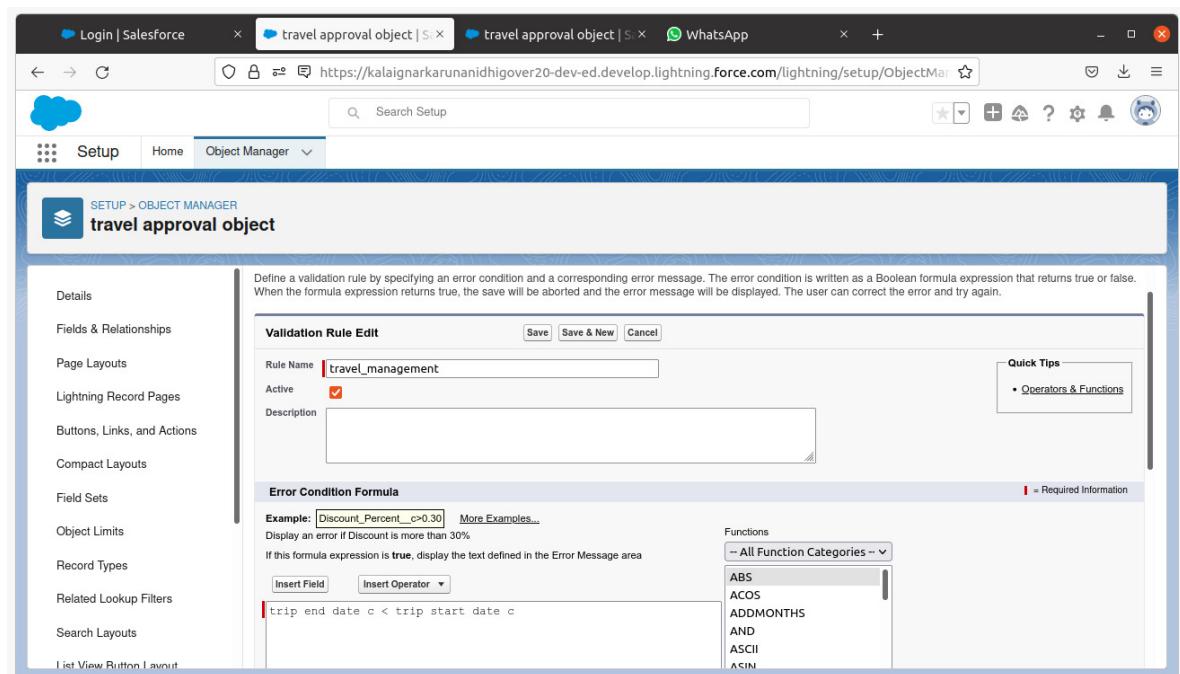
The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing sections like App Manager, student, and Object Manager. Under the student section, 'Page Layouts' is selected. The main content area displays the 'Page Layouts' list for the 'student' object. It shows one item: 'student Layout' created by 'Kayalvizhi S' on 20/04/2023 at 7:42 pm, last modified by 'Kayalvizhi S' on 20/04/2023 at 7:52 pm. The page layout is sorted by 'Page Layout Name'. The sidebar also lists other customization options like Details, Fields & Relationships, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.

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Add Business Logic to Travel App :



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The screenshot shows the Salesforce Object Manager interface. The left sidebar has 'Fields & Relationships' selected. The main area is titled 'travel approval object New Custom Field'. It's Step 2 of 5, titled 'Enter the details'. The 'Field Label' is 'total expenses' and the 'Field Name' is 'total_expenses'. There are fields for 'Description' and 'Help Text' which are currently empty. At the bottom right of the form are 'Previous', 'Next', and 'Cancel' buttons.

The screenshot shows the Salesforce Object Manager interface. The left sidebar has 'Fields & Relationships' selected. The main area is titled 'travel approval object New Custom Field'. It's Step 3 of 5, titled 'Define the summary calculation'. Under 'Select Object to Summarize', 'travel approval object' is the Master Object and 'expense items' is the Summarized Object. Under 'Select Roll-Up Type', 'SUM' is selected. A yellow highlight covers the 'Field to Aggregate' dropdown set to 'None'. Under 'Filter Criteria', 'All records should be included in the calculation' is selected. At the bottom right of the form are 'Previous', 'Next', and 'Cancel' buttons.

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The screenshot shows the Salesforce Setup interface for managing static resources. The left sidebar has a search bar and navigation links for Custom Code and Static Resources. The main content area is titled "Static Resources" and contains a sub-section titled "Static Resources". It provides instructions on using static resources to upload content for Visualforce pages. A table lists a single resource named "statusimages" with details: Action (Edit | Del), Name (statusimages), Namespace Prefix (None), Description (None), MIME Type (application/zip), Size (1,10,789 KB), Created By Alias (None), Created Date (22/04/2023), Last Modified Date (22/04/2023, 12:33 pm), and Cache Control (Private). A "New" button is visible at the top right of the table.

The screenshot shows the Salesforce Setup interface for creating a new custom object named "travel approval object". The left sidebar includes links for 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, and List View Button Layout. The main content area is titled "travel approval object" and shows "Step 4. Add to page layouts". It displays field details: Field Label (status), Data Type (Picklist), Field Name (status), and Description (rejected). Below this, it asks to select page layouts for the field. Two checkboxes are checked: "Add Field" and "Page Layout Name", with "travel approval object Layout" selected. A note says: "When finished, click Save & New to create more custom fields, or click Save if you are done." Navigation buttons at the bottom include Previous, Save & New, Save, and Cancel.

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The screenshot shows the Salesforce Object Manager interface for creating a new custom field named "travel approval object". The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Record Types. The main area is titled "New Custom Field" and "Step 5. Add to page layouts". It shows the field's configuration: Field Label "Status Indicator", Data Type "Formula", and Field Name "Status_Indicator". A note says the field will be added as the last field in the first 2-column section of the page layout. Under "Add Field Page Layout Name", "travel approval object Layout" is selected. Buttons at the bottom include "Previous", "Save & New", "Save", and "Cancel". A status bar at the bottom right says "New Admin Settings for Record Pages".

The screenshot shows the detailed configuration of the "status" field. The left sidebar includes "Fields & Relationships". The main area shows the field name "status" with a value "rejected" in the description field. Other settings include "Restrict picklist to the values defined in the value set" checked, "Help Text" (empty), "Required" (unchecked), "Auto add to custom report type" (checked), and "Default Value" (empty). A note at the bottom explains formula syntax. Navigation buttons "Previous", "Next", and "Cancel" are at the bottom right.

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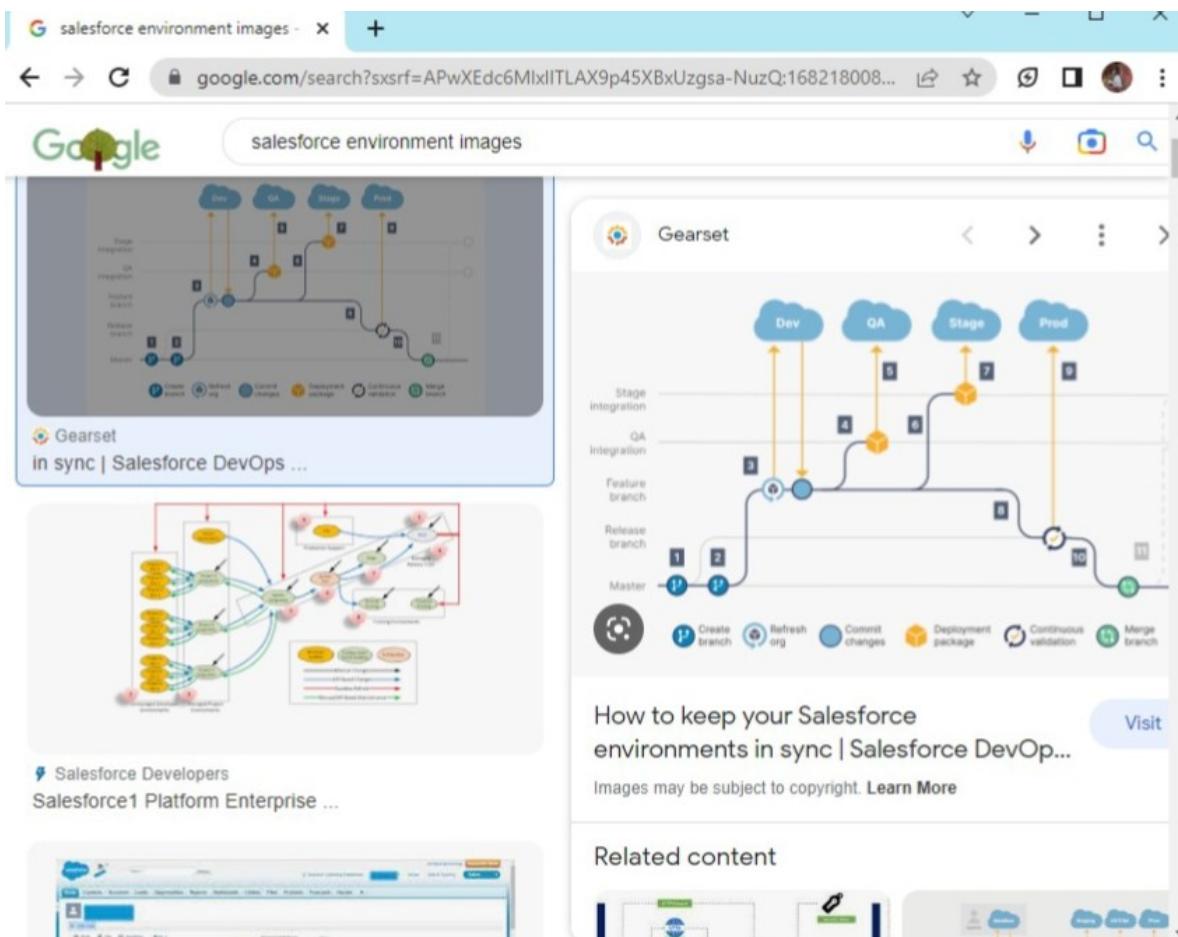
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What are Reports ?

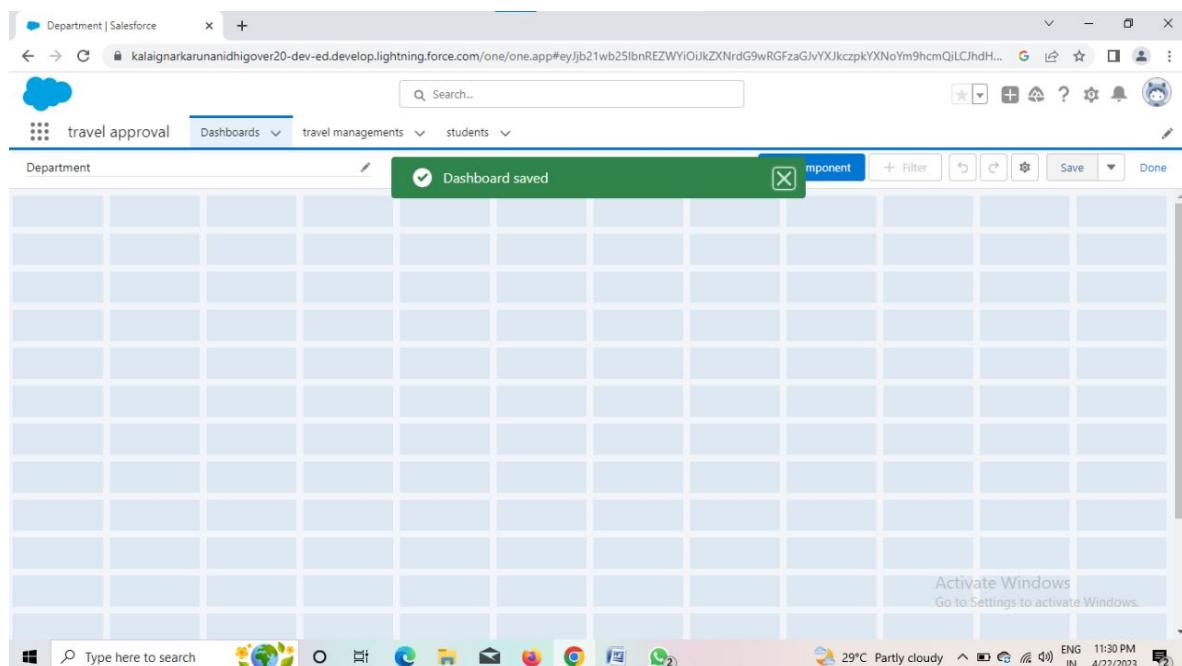
The screenshot shows the Salesforce Report Builder interface. At the top, there's a header bar with a back arrow, forward arrow, refresh icon, and a URL bar showing the current page. Below the header is a navigation bar with icons for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Reports (which is currently selected), and More. A search bar labeled "Search..." is also present. The main content area is titled "Create Report". On the left, there's a sidebar with a "Category" section containing "Recently Used" and a list of categories: All, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, and Campaigns. The "All" category is currently selected. To the right of the sidebar, there's a search bar with the text "deps" and a list of report types under "Report Type Name": Departments, Departments with Travel approvals and Students, and Students with Travel approvals and Departments.

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Dashboards :



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4. Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/ksakthi21>
Team Member 1 - <https://trailblazer.me/id/kavimeena>
Team Member 2 - <https://trailblazer.me/id/kalam97>
Team Member 3 - <https://trailblazer.me/id/jpiya>

5. ADVANTAGES :

- * The process tedious and time consuming task
- * Easiest way
- * Saves time for both employes and managers
- * The entire process is digitized and streamlined
- * Reduces the workload
- * Increased Transparency
- * Provides greater control and security over employee travel

DISADVANTAGES:

- * The process includes too many levels of approval that make tedious and confusing
- * Regular Maintenance
- * Internet connection problem is there
- * Poor connection leads to trouble and anxiety
- * Lack of leadership
- * It can be costly sometimes
- * Poor communication

6. APPLICATIONS:

- * The application ensures that travel requests comply with the company's travel policies which reduces the risk of non-compliant expenses and unnecessary travel.
- * The application helps reduce travel costs by allowing the company to track expenses and stay within budget. This also helps the company negotiate better deals with travel vendors.

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**The application saves time for both the employee and the travel request and approval process. This allows the HR department and travel managers to focus on more strategic tasks.*

7. CONCLUSION :

An employee travel approval applications is a valuable tool for corporate travel management. It streamlines the travel request and approval process ensures policy compliance, and provides transparency to all parties involved. A well-designed application can save time and money, making it an essential tool for corporate that frequently travel for business.

8. FUTURE SCOPE:

- * In future it will be really a useful one in the application of travel approval.*
- * It is trusted to be in future everyone will utilize this.*
- * The customer will set good service and make it trustworthy.*
- * Hope it would fulfill all the needs of the users.*

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