

BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

1. INTRODUCTION

1.1 OVERVIEW

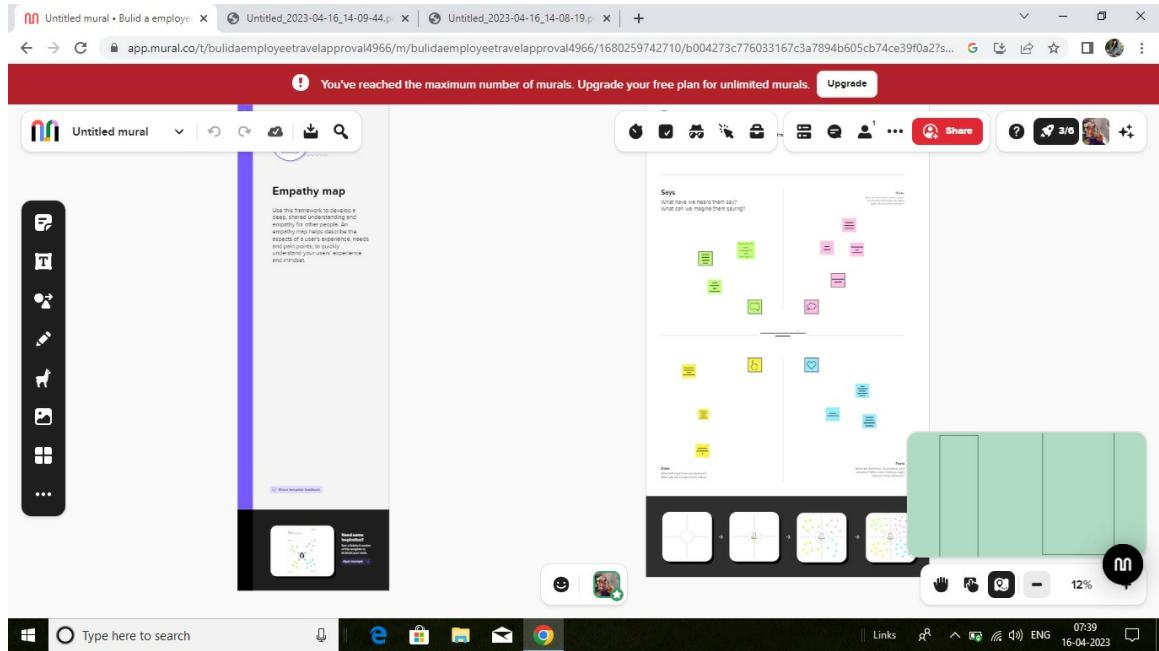
Corporate travel is an integral part of the business world , as companies need to travel to meet clients, attend conferences and meetings, and explore new markets. However, managing employee travel can be a cumbersome task for the HR and travel departments.

1.2 Purpose

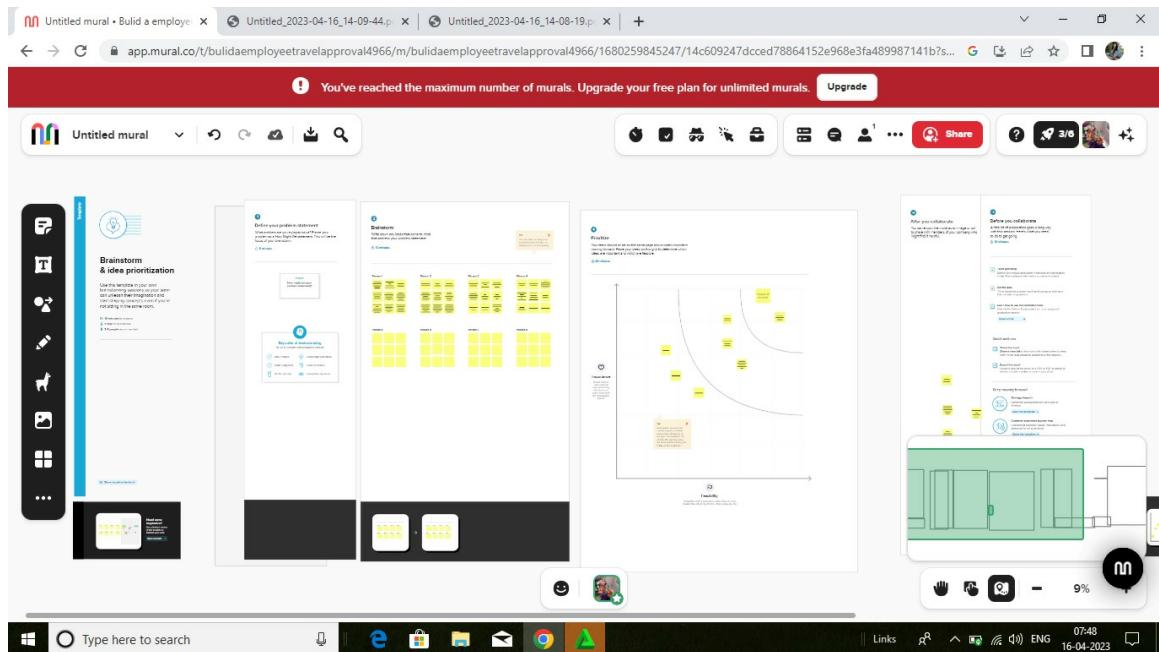
The application saves time for both the employee and the travel manager by automating the travel request and approval process. The application ensures that travel request comply with the company's travel policies, which reduces the risk of non-compliant expenses and unnecessary travel

2. PROBLEM DEFINITION AND DESING THINKING

2.1 EMPATHY MAP



2.2 IDEATION AND BRAINSTORMING MAP



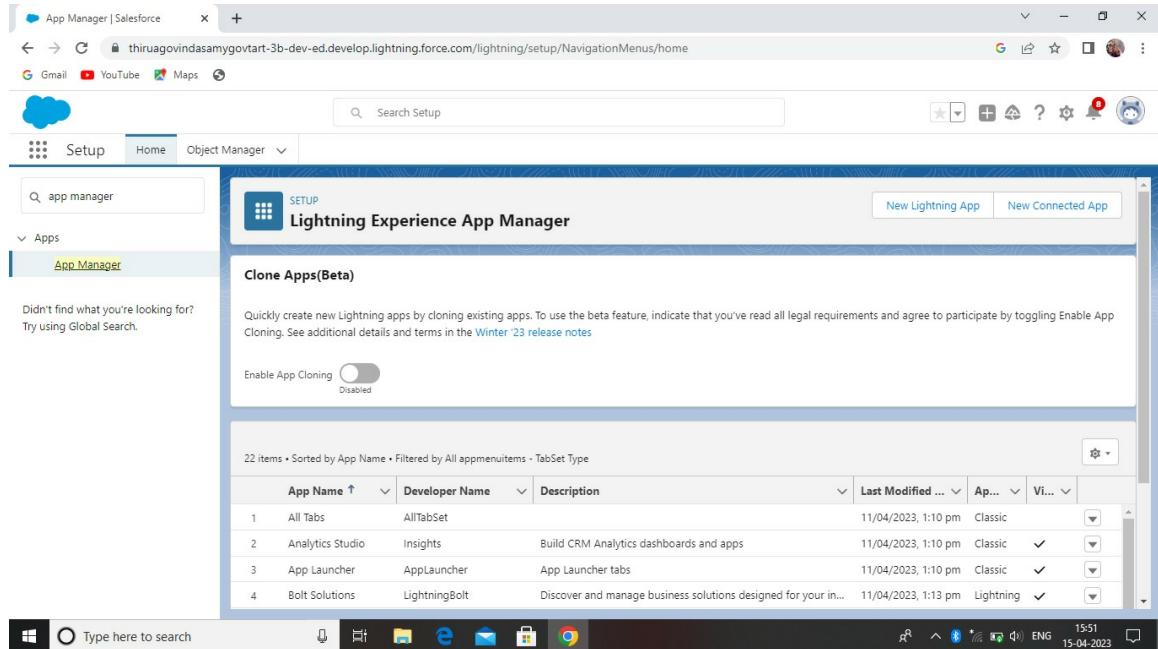
3. RESULT

3.1 DATA MODEL

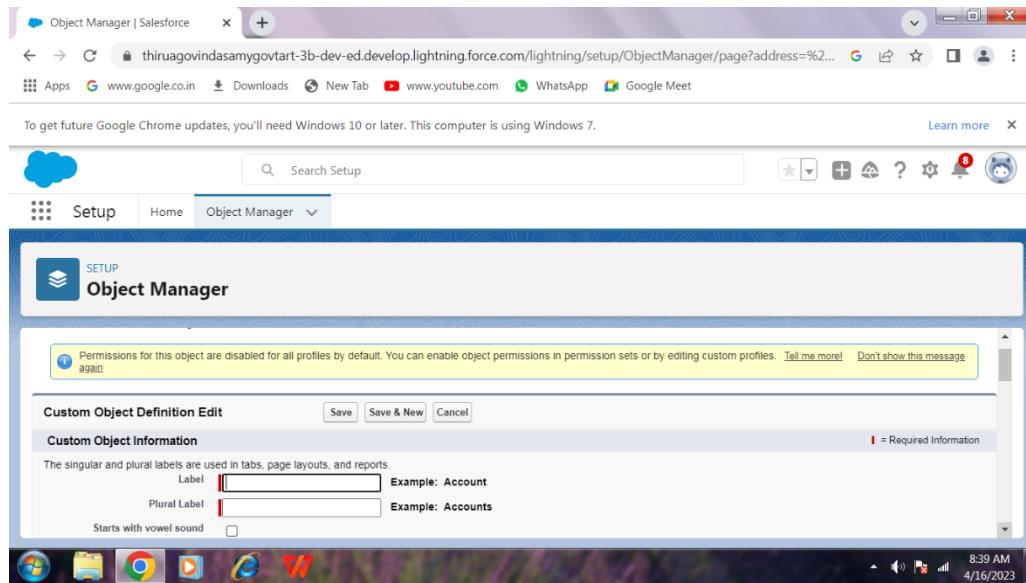
Object name	Fields in the object	
Department	Field label	Data type
	Days Remaining	Text
Travel Approval	Field label	Data type
	Total Expenses	Roll- up summary
Expense Item	Field label	Data type
	Status Indicator	Picklist

3.2 ACTIVITY AND SCREENSHOT

Activity-1



Custom object creation



Department

Department | Salesforce

thiruagovindasamygovtart-3b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i000001mxSr/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Department

Details

Description

API Name: Department__c
Custom: ✓
Singular Label: Department
Plural Label: Departments

Enable Reports: ✓
Track Activities
Track Field History
Deployment Status: Deployed
Help Settings
Standard salesforce.com Help Window

https://thiruagovindasamygovtart-3b-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/015i000001mxSr/LightningPages/view

15:53 15-04-2023

Department

Edit Delete

Travel Approval

Travel Approval | Salesforce

thiruagovindasamygovtart-3b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i000001mxY6/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Travel Approval

Details

Description

API Name: Travel_Approval__c
Custom: ✓
Singular Label: Travel Approval
Plural Label: Travel Approvals

Enable Reports: ✓
Track Activities
Track Field History
Deployment Status: Deployed
Help Settings
Standard salesforce.com Help Window

https://thiruagovindasamygovtart-3b-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/015i000001mxY6/CompactLayouts/view

15:54 15-04-2023

Travel Approval

Edit Delete

Expense Item

The screenshot shows the Salesforce Setup interface with the title "Expense Item | Salesforce". The URL in the address bar is <https://thiruagovindasamygovtart-3b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5000001mxYa/Details/view>. The page displays the "Expense Item" object details. On the left, a sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main "Details" section shows the API Name as "Expense_Item__c", which is a Custom type. It also lists Singular Label ("Expense Item") and Plural Label ("Expense Item"). To the right, there are sections for Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window. At the bottom of the page, the URL is again shown as <https://thiruagovindasamygovtart-3b-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01I5000001mxYa/PageLayouts/view>.

Tabs

The screenshot shows the Salesforce Setup interface with the title "Tabs | Salesforce". The URL in the address bar is <https://thiruagovindasamygovtart-3b-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home>. The page displays the "Custom Tabs" section. On the left, a sidebar shows a search bar with "tabs" and a "User Interface" section with "Rename Tabs and Labels" and "Tabs" selected. The main area shows a heading "Custom Tabs" with a "Help for this Page" link. Below it, a note says "You can create new custom tabs to extend Salesforce functionality or to build new application functionality." It explains three types of tabs: Custom Object tabs (e.g., Departments, Expense Item, Travel Approvals), Visualforce tabs, and Lightning Component tabs. A table titled "Custom Object Tabs" lists three entries: "Edit | Del" for "Departments" (Tab Style: Bank), "Edit | Del" for "Expense Item" (Tab Style: Car), and "Edit | Del" for "Travel Approvals" (Tab Style: Cell phone). A "Web Tabs" section below shows a note: "No Web Tabs have been defined".

The screenshot shows the Salesforce Object Manager interface for the 'student' object. The left sidebar lists various customization options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area is titled 'Fields & Relationships' and displays a table of fields:

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)		
Owner	OwnerId	Lookup(User,Group)		✓
student Name	Name	Text(80)		✓

Use Customization

The screenshot shows the Salesforce Object Manager interface for the 'Travel Approval' object. The left sidebar lists customization options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area is titled 'Page Layouts' and shows the 'Travel Approval Detail' layout configuration:

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Travel Approval Detail

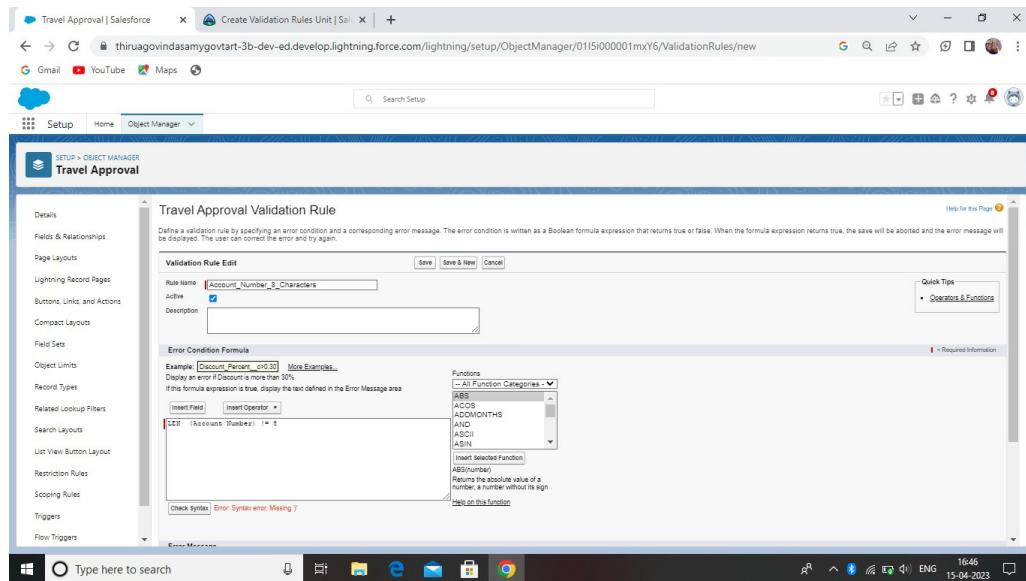
Standard Buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy

Custom Buttons:

- Information (Header visible on edit only): * Travel Approval Name, Owner: Sample Text
- System Information (Header visible on edit only): Created By: Sample Text, Last Modified By: Sample Text
- Custom Links (Header visible on edit only):

Mobile Cards (Salesforce mobile only): Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Create Validation Rule



Create Formula Fields

Fields & Relationships

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)		
Status Indicator	Status_Indicator__c	Text(3)		
Total Expenses	Total_Expenses__c	Roll-Up Summary (MIN TravelApproval field)		
Travel Approval Name	Name	Text(80)		

Dashboards

Sample Flow Report: Screen Flows

0%

[View Report \(Sample Flow Report: Screen Flows\)](#)

4. TRAILHEAD PROFILE PUBLIC URL

Team Lead -

<https://trailblazer.me/id/B97F08CE241A336B4554311B052D09F8>

Team Member 1 -

<https://trailblazer.me/id/kumae2>

Team Member 2 -<https://trailblazer.me/id/krajiii>

Team Member 3 -

<https://trailblazer.me/id/A8B44509A4CD1C7A9D442C6097DE6F8>

5. ADVANTAGES

- a. The process is tedious and time consuming task
- b. Saves time for both employees and managers
- c. Provides greater control and security over employee travel

DISADVANTAGES

- a. Regular Maintenance

- b. Internet Connection problem is there
- c. Poor communication
- d. Poor connection leads to trouble

6. APPLICATIONS

- a. Collecting data for marketing
- b. Planning your operations
- c. Improving interactions and communications

7. CONCLUSION

Salesforce is a great platform and easy to use, powerful, quick as well as good community. The project aim is to provide real time knowledge for all the students who have basic knowledge of salesforce and looking for a real time project.

8. FUTURE SCOPE

Scope of education means range of view, outlook, field or opportunity of activity, operation and application of education. Education has a wider meaning and application.

