
PROJECT REPORT

BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATE

1. INTRODUCTION

1.1 Overview

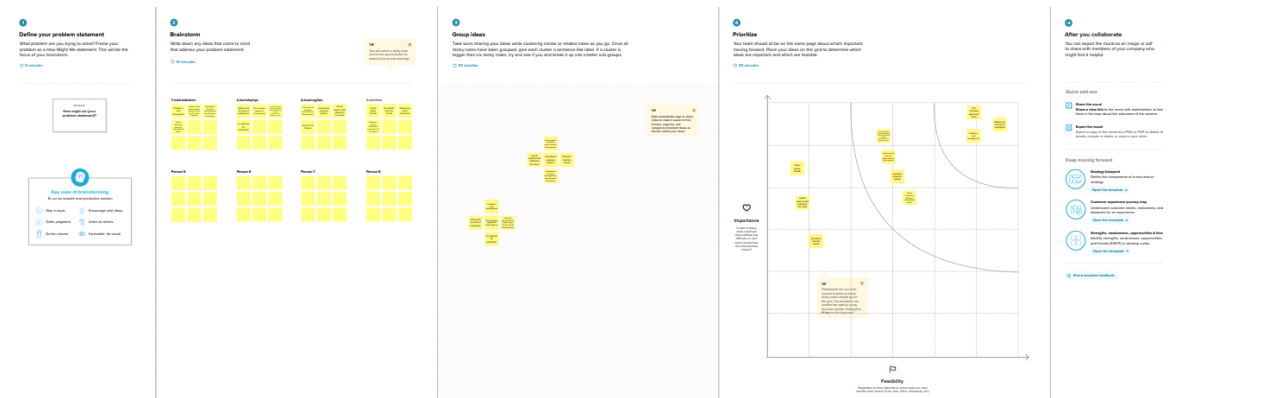
The project aim is to provide real-time knowledge for all the students who have a basic knowledge of salesforce and looking for a Real-time project. This project will also help to those professional who are in cross-technology and wanted to switch to salesforce with the help of this project they will gain knowledge and can include into their resumes as well.

1.2 purpose

The project defines the process and the eligibility for travel within and outside the country on business visits. The company expects the employee to travel exeditonaly and comfortably to meet the business needs. It is also expected that the employee to be consious to the cost to company and avoid wasteful expenses.

2. PROBLEM DEFINITION&DESIGN THINKING

2.1 Empathy Map



3.RESULT

3.1 Data model:

OBJECT NAME	FIELDS IN THE OBJECT	
DEPARTMENT	FIELD LABEL	DATA TYPE
	DEPARTMENT NAME	TEXT(80)

TRAVEL APPROVEL

FIELD LABEL	DATA TYPE
AMOUNT	CURRENCY(18,0)
DEPARTMENT	MASTER-DETAIL(DEPARTMENT)
EXPENSE TYPE	PICKLIST
PURPOSE OF TRIP	TEXT(16)
STATUS	PICKLIST
STATUSINDICATER	FORMULA(TEXT)
TOTAL EXPENSES	ROLL-UP SUMMARY(SUM EXPENSES)
TRAVEL APPROVEL NAME	TEXT(80)
TRIP END DATE	DATE
TRIP START DATE	DATE

EXPENSE ITEMS

	FIELD LABEL	DATA TYPE
	AMOUNT	CURRENCY(18,0)
	EXPENSE ITEM NAME	TEXT(80)
	TRAVEL APPROVAL	MASTER-DETAIL(TRAVEL APPROVAL)

3.2 ACTIVITY & SCREENCHAT

MILESTONE 1- CREATE SALESFORCE ORG

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MILESTONE-2 CREATING THE APPLICATION

App Manager | Salesforce

governmentartsandscienc413-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app manager

Apps

App Manager

Didn't find what you're looking for? Try using Global Search.

Lightning Experience App Manager

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		27/03/2023, 2:53 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	27/03/2023, 2:53 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	27/03/2023, 2:53 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for y...	27/03/2023, 2:56 pm	Lightning	✓
5	Community	Community	Salesforce CRM Communities	27/03/2023, 2:53 pm	Classic	✓
6	Content	Content	Salesforce CRM Content	27/03/2023, 2:53 pm	Classic	✓

Type here to search

35°C Sunny 3:18 AM 4/11/2023

MILESTONE-3 WHAT IS AN OBJECT?

Object Manager | Salesforce x New Custom Object | Salesforce x +

governmentartsandscienc413-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Search Setup

Setup Home Object Manager

SETUP New Custom Object

New Custom Object

Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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](#)

Type here to search

35°C Sunny 3:20 AM 4/11/2023

MILESTONE-4 CREATE-FIELD&RELATIONSHIP

Object Manager | Salesforce x Tabs | Salesforce x +

governmentartsandscienc413-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Search Setup

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit / Del	Departments	Airplane	Department
Edit / Del	Expense Items	Books	
Edit / Del	Travel Approvals	Bank	

Web Tabs

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

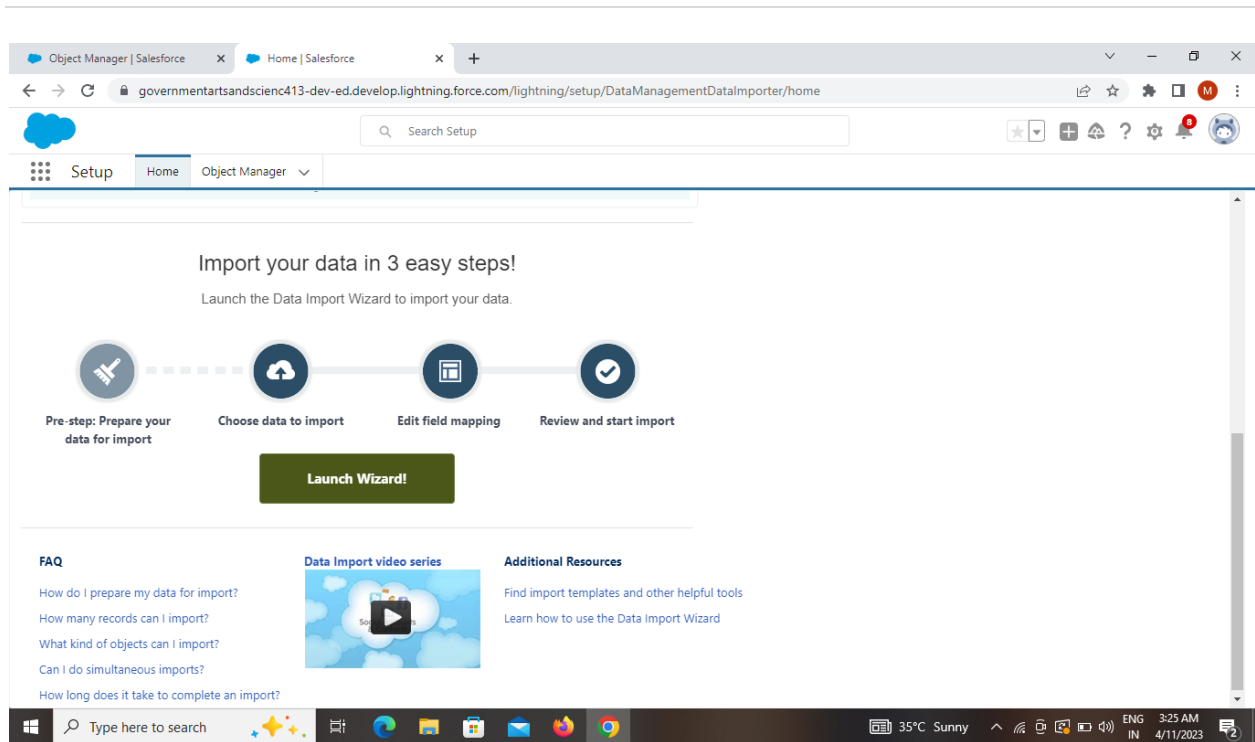
New What Is This?

https://governmentartsandscienc413-dev-ed.develop.lightning.force.com/one/on...

Type here to search

35°C Sunny 3:21 AM 4/11/2023

MILESTONE-5 IMPORT DEPARTMENTS



MILESTONE-6 CUSTOMIZE USER INTERFACE

Users | Salesforce

governmentartsandscienc413-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253...

Search Setup

Setup Home Object Manager

users

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

Feature Settings

- Data.com
 - Prospector Users

Didn't find what you're looking for? Try using Global Search.

New User

User Edit Save Save & New Cancel

General Information

First Name Last Name Alias Email Username Nickname Title Company Department Division

Role <None Specified> User License Force.com - Free Profile Force.com - Free User Active ☒ Marketing User ☐ Offline User ☐ Knowledge User ☐ Flow User ☐ Service Cloud User ☐ Site.com Contributor User ☐ Site.com Publisher User ☐ WDC User ☐ Data.com User Type None

MILESTONE-7 USE CUSTOMIZATION

Travel approval | Salesforce

governmentartsandscienc413-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00004481z/PageLayouts/view

Search Setup

Setup Home Object Manager

SETUP > 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

Page Layouts

1 Items, Sorted by Page Layout Name

Quick Find

New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Travel approval Layout	Mahalakshmi T, 02/04/2023, 3:27 pm	Mahalakshmi T, 06/04/2023, 8:37 pm	<div>EditDelete</div>

javascript:void(0); button Layout

Type here to search

35°C Sunny

ENG 3:34 AM 4/11/2023

MILESTONE-8 ADD BUSSINES LOGIC TO TRAVEL APP

Travel approval | Salesforce

governmentartsandscienc413-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004481z/ValidationRules/view

Search Setup

Setup Home Object Manager

SETUP > 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

List View Button Layout

Validation Rules

1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Rule1	Trip end date	You have exceeded the travel time	✓	Mahalakshmi T, 06/04/2023, 8:43 pm

MILESTONE-10 WHAT ARE REPORTS

New Departments Report | Sales | X

governmentartsandscienc413-dev-ed.develop.lightning.force.com/lightning/r/Report/0002w00000D9OmnEAF/view?queryScope=userFolders

Search...

Travel approval Home Accounts Contacts Departments Travel approvals Expense items Reports Dashboards

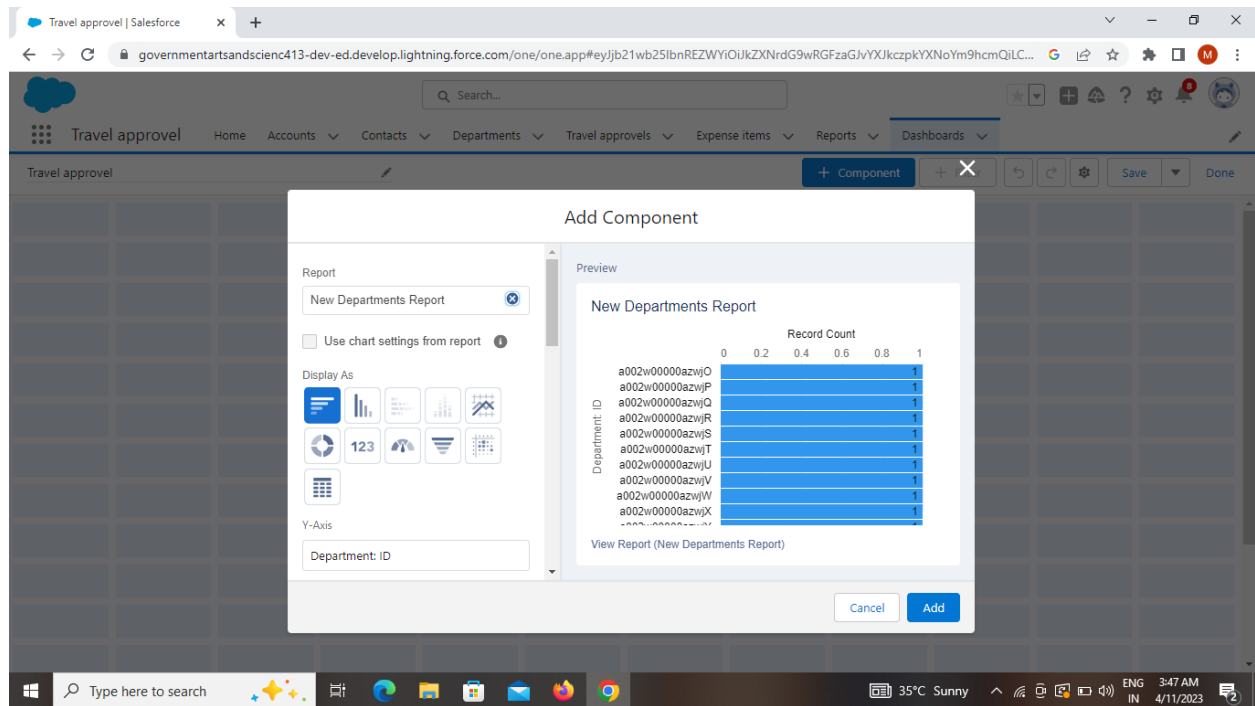
Report: Departments New Departments Report

Enable Field Editing Add Chart Edit

<input type="checkbox"/> Department: ID	<input type="checkbox"/> Department: Department Name
Subtotal	
<input type="checkbox"/> a002w00000b0KLI (1)	physics
Subtotal	
<input type="checkbox"/> a002w00000b0KUW (1)	english
Subtotal	
<input type="checkbox"/> a002w00000b0Kix (1)	gemistry
Subtotal	
<input type="checkbox"/> a002w00000b0Km7 (1)	tamil
Subtotal	
<input type="checkbox"/> a002w00000b0Kmc (1)	computer
Subtotal	
<input type="checkbox"/> a002w00000b0KmH (1)	histry
Subtotal	
Total (22)	

Row Counts Detail Rows Subtotals Grand Total

MILESTONE-11 DASHBOARDS



4. TRIALHEAD PROFILE PUBLIC URL

TEAM LEAD- <https://trailblazer.me/id/mthangavel8>

TEAM MEMBER 1-<https://trailblazer.me/id/kkanishpriya>

TEAM MEMBER 2-<https://trailblazer.me/id/mpraveesh>

TEAM MEMBER 3-<https://trailblazer.me/id/kjamuna>

5.ADVANTAGES&DISADVANTAGE

ADVANTAGES:

More networking opportunities
To meet with prospective clients

DISADVANTAGES:

Need provision for late travel application approvals

6.APPLICATION

Helps for a well planned trip..
Includes both domestic & International Travels..

7.CONCLUSION

Since the travel approval is transparent, the travel by clients will be pleasant and Happy...!!!

8.FUTURE SCOPE

A dramatic increase in the number of vacancies requiring project oriented skills

High Attrition rates(including professionals retiring from jobs)

High demand for project talents, especially in rapidly developing economics such as a India & china.

By 2027, businesses will need 87.7 million professionals in project management roles.