

Project Report Template

BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

1.INTRODUCTION:

1.1 OVERVIEW

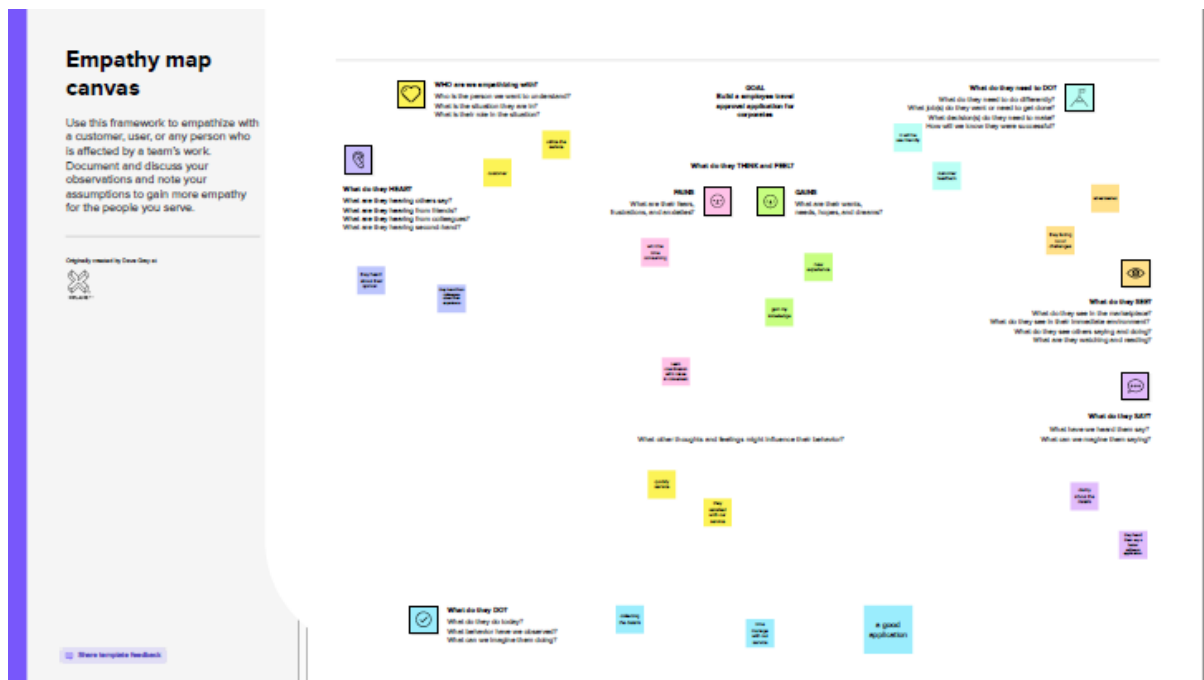
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project.

1.2 PURPOSE

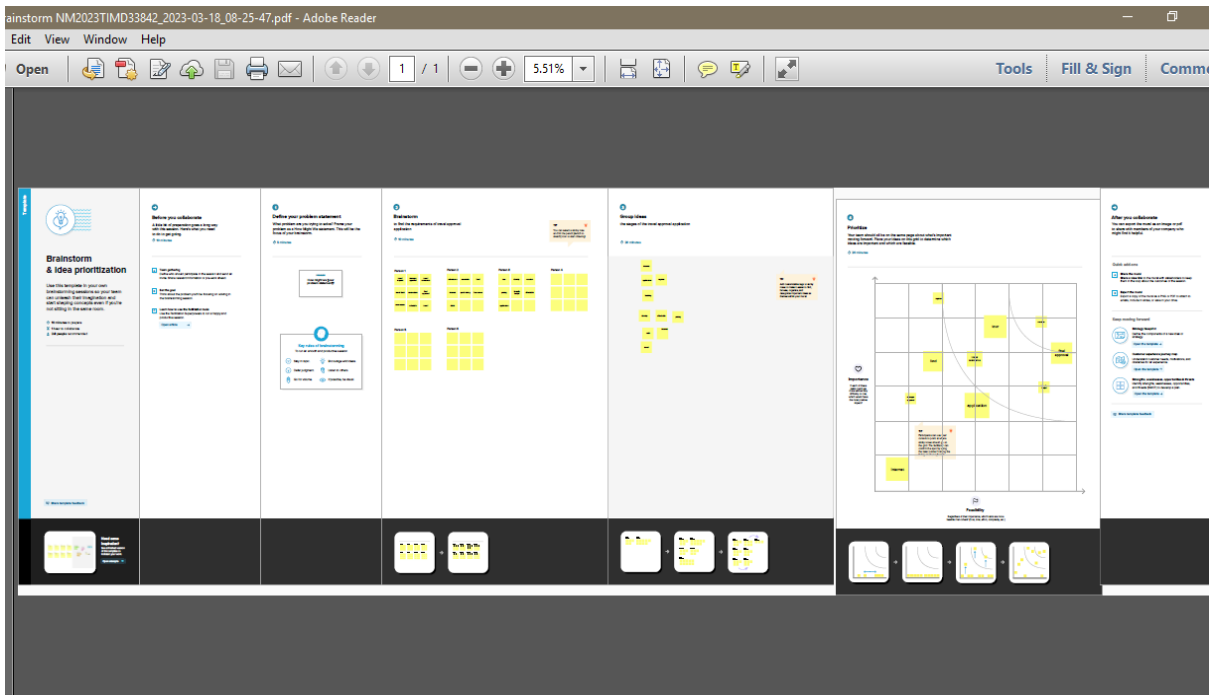
This project will also help to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

2. PROBLEM DEFINITION AND DESIGN THINKING

2.1 Empathy Map



2.2 Ideation and Brainstorming Map



3. RESULT:

3.1 Data model:

Object name	Field in the object	
Department		
	FIELD LABEL	DATA TYPE
	Department code	Text(10)
	Department Name	Text(80)
Travel approval		
	FIELD LABEL	DATA TYPE
	Department	Lookup(Department)
	Destination State	Text(2)
	Out-of -State	Checkbox
	Purpose of Trip	Text Area(255)
	Status	Picklist
	Status Indicator	Formula(Text)
	Total Expenses	Roll-Up Summary (SUM Expenses Item)
	Travel Approval	Auto Number
	Trip End Date	Date
	Trip Start Date	Date
Expense Item		
	FIELD LABEL	DATA TYPE
	Amount	Currency(16,2)
	Expense Item Number	Auto Number
	Expense Type	Picklist
	Travel Approval	Master-Detail(Travel Approval)

3.2 Activity and screenshot:

Milestone 1- Create Salesforce Org:

We have created the developer account and login for Salesforce account.

Milestone 2- Creating the Application:

We have created the Travel Application. For that we have used the lightning experience app manager.

The screenshot shows the 'App Details & Branding' configuration page in the Salesforce App Manager. The left sidebar lists 'App Settings' with 'App Details & Branding' selected. The main content area is divided into 'App Details' and 'App Branding' sections. In 'App Details', the 'App Name' is 'Travel App', the 'Developer Name' is 'Travel_App', and there is a text area for the 'Description'. In 'App Branding', there is an 'Image' upload area, a 'Primary Color Hex Value' set to '#0070D2', and an 'Org Theme Options' checkbox which is currently unchecked. At the bottom, an 'App Launcher Preview' shows a blue icon with 'TA' and the text 'Travel App'.

Section	Field	Value
App Details	App Name	Travel App
	Developer Name	Travel_App
	Description	Enter a description...
App Branding	Image	Upload
	Primary Color Hex Value	#0070D2
Org Theme Options	Use the app's image and color instead of the org's custom theme	<input type="checkbox"/>
App Launcher Preview	Icon	TA
App Launcher Preview	Label	Travel App

Milestone 3- Object :

In this Travel Approval application we need to create three objects:

Department

Travel Approval

Expenses Item

Department

The screenshot shows the Salesforce Setup interface for the 'Department' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar contains a list of setup categories, with 'Object Manager' selected. The main content area is titled 'Department' and displays a 'Details' section. This section is divided into two columns. The left column lists various configuration options, and the right column shows the current settings for the 'Department' object.

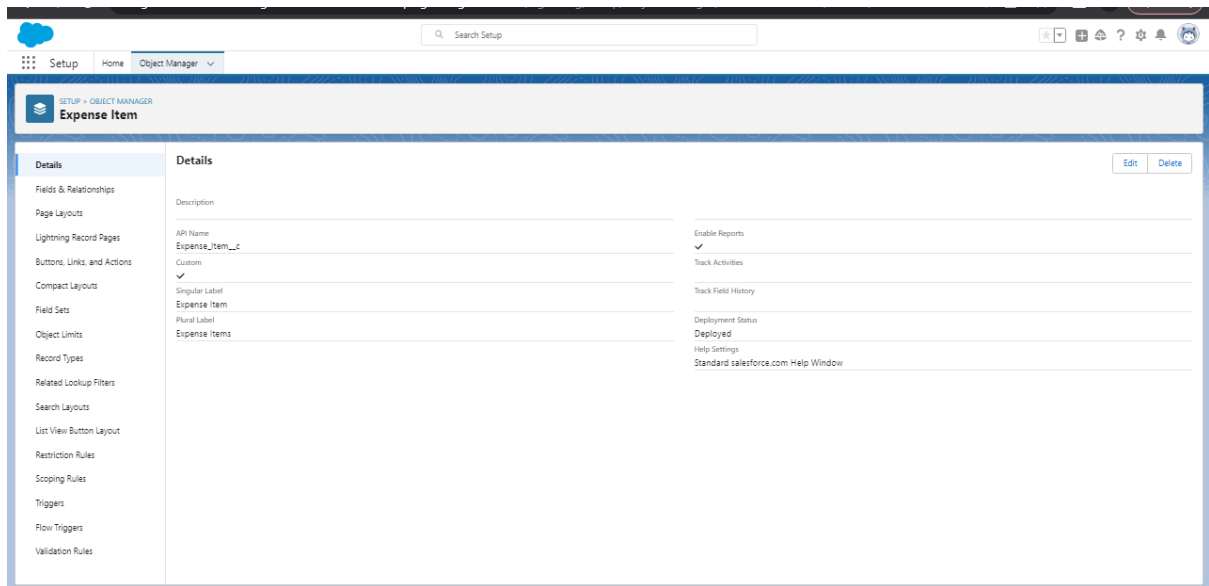
Details	
Description	
API Name	Department__c
Custom	✓
Singular Label	Department
Plural Label	Departments
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Travel Approval

The screenshot shows the Salesforce Setup interface for the 'Travel Approval' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar contains a list of setup categories, with 'Object Manager' selected. The main content area is titled 'Travel Approval' and displays a 'Details' section. This section is divided into two columns. The left column lists various configuration options, and the right column shows the current settings for the 'Travel Approval' object.

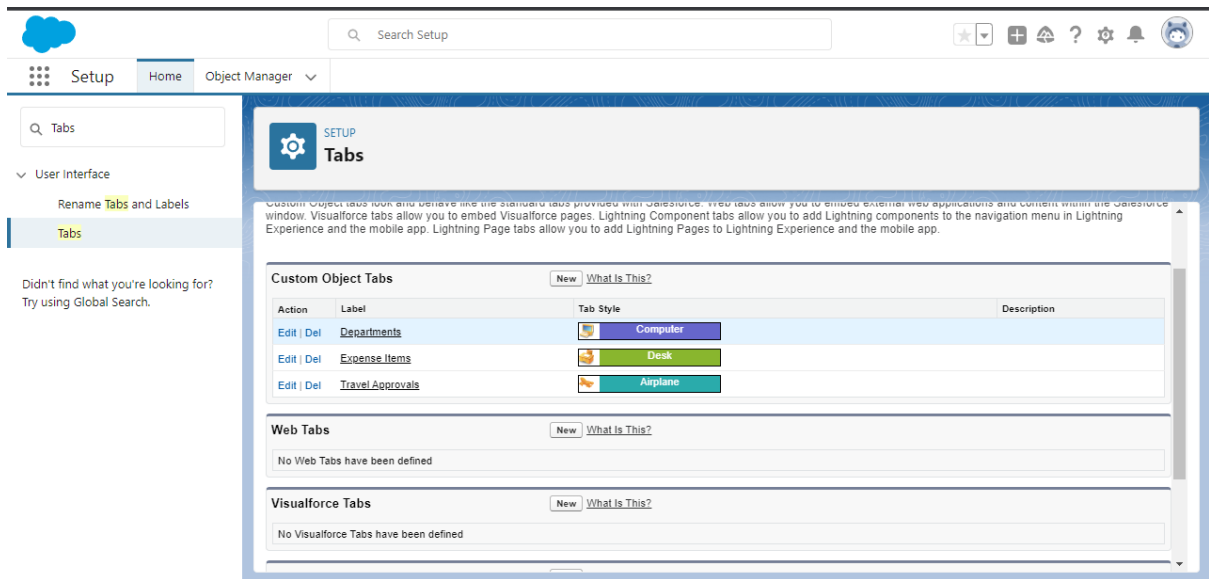
Details	
Description	
API Name	Travel_Approval__c
Custom	✓
Singular Label	Travel Approval
Plural Label	Travel Approvals
Enable Reports	✓
Track Activities	✓
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Expenses Item



Milestone 4 – Tab

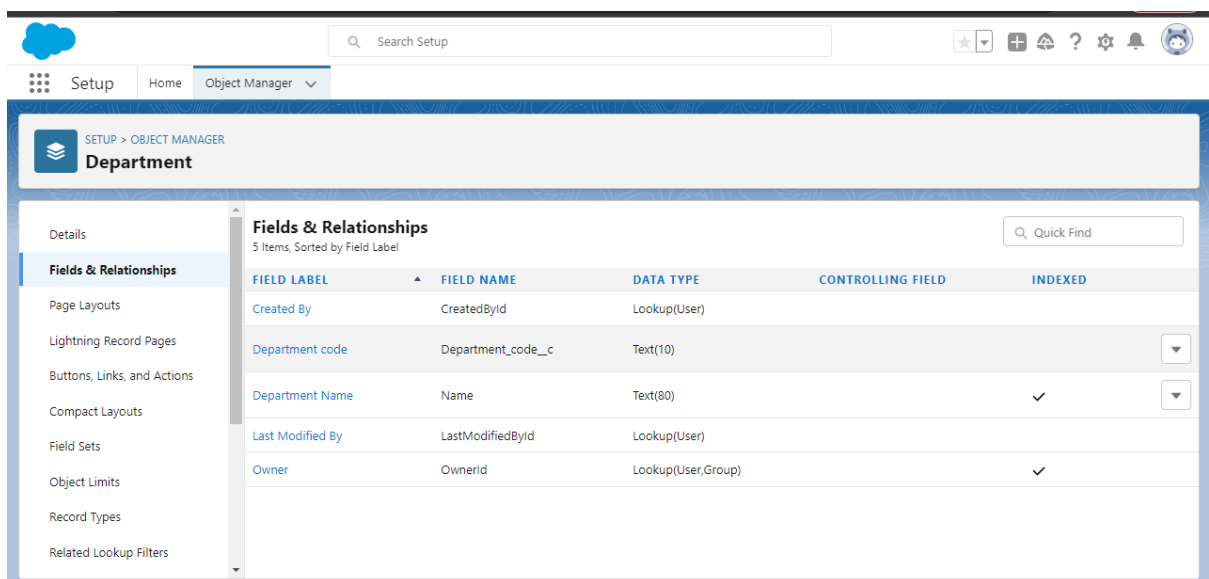
Tab in Salesforce help users to view the information at a glance. It displays the data of objects and other web content in the application.



Milestone 5 – Create- Fields and Relationships:

Fields in Salesforce represents about the columns in relational databases mean. It can store data values which are required for a particular object in a record.

Department



Travel Approval

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Travel Approval

Details

Fields & Relationships

13 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	Lookup(Department)		✓
Destination State	Destination_State__c	Text(2)		
Last Modified By	LastModifiedById	Lookup(User)		
Out of State	Out_of_State__c	Checkbox		
Owner	OwnerId	Lookup(User Group)		✓
Purpose of Trip	Purpose_of_Trip__c	Text Area(255)		
Status	Status__c	Picklist		
Status Indicator	Status_Indicator__c	Formula (Text)		
Total Expenses	Total_Expenses__c	Roll-Up Summary (SUM Expense Item)		
Travel Approval	Name	Auto Number		✓
Trip End Date	Trip_End_Date__c	Date		
Trip Start Date	Trip_Start_Date__c	Date		

Expenses Item

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Expense Item

Details

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

New

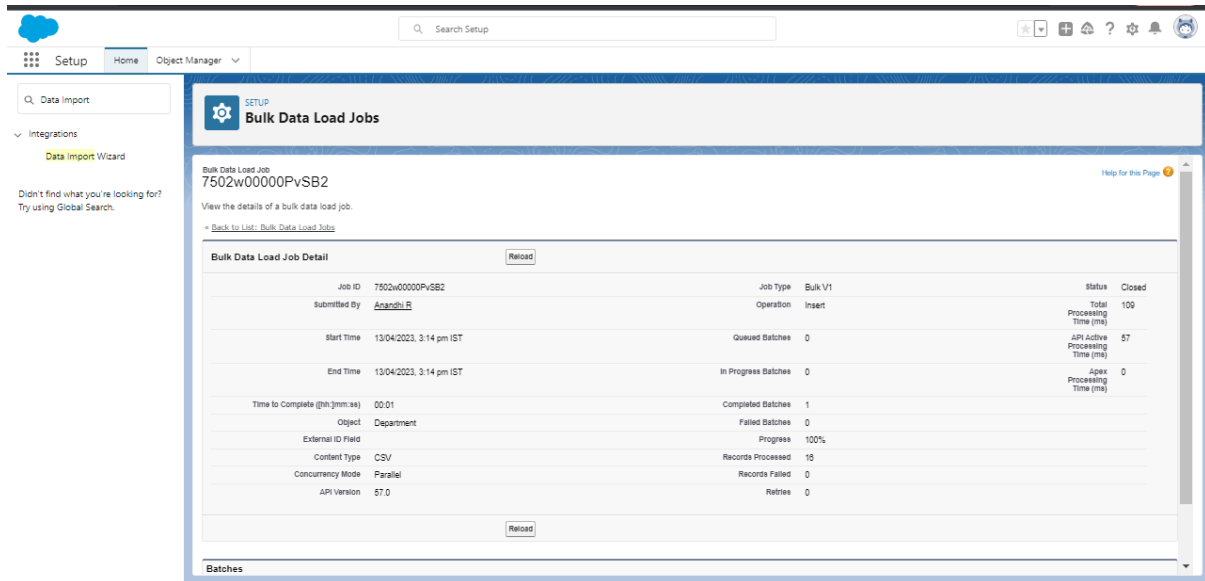
Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Expense Item Number	Name	Auto Number		✓
Expense type	Expense_type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Travel Approval	Travel_Approval__c	Master-Detail(Travel Approval)		✓

Milestone 6 – Import Departments



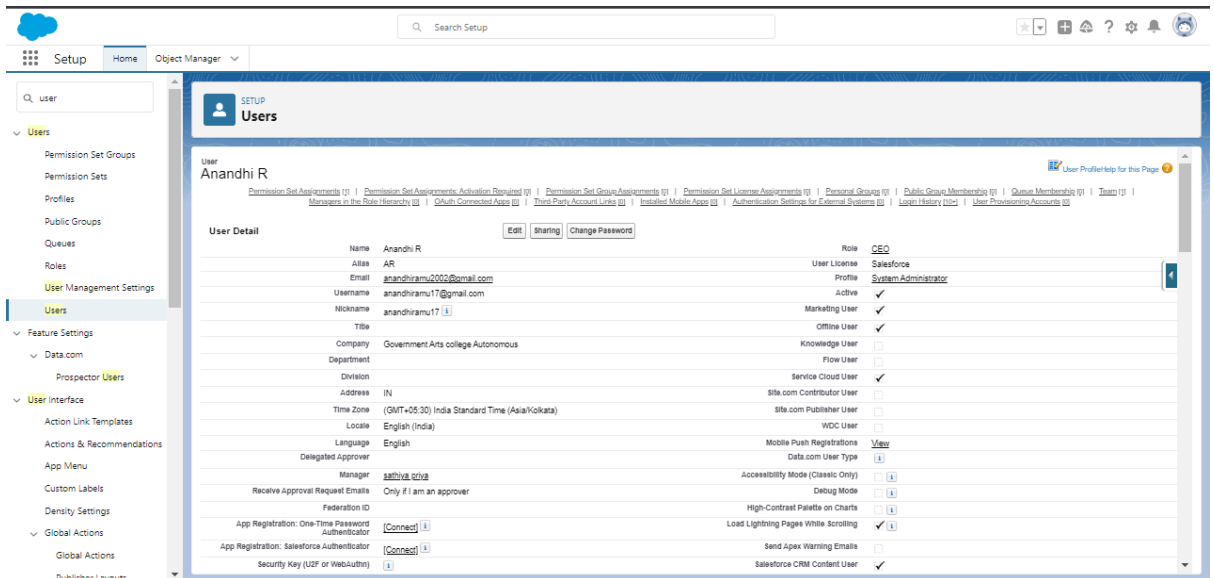
The screenshot shows the Salesforce Setup interface for Bulk Data Load Jobs. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the details for a Bulk Data Load Job with ID 7502w00000PvSB2. The job is submitted by Anandhi R and is currently in a 'Released' state. The job details table shows the following information:

Bulk Data Load Job Detail		Job Type	Bulk V1	Status	Closed
Submitted By	Anandhi R	Operation	Insert	Total Processing Time (ms)	100
Start Time	13/04/2023, 3:14 pm IST	Queued Batches	0	API Active Processing Time (ms)	57
End Time	13/04/2023, 3:14 pm IST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete (@1h3mm:ss)	00:01	Completed Batches	1		
Object	Department	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	16		
Concurrency Mode	Parallel	Records Failed	0		
API Version	57.0	Retries	0		

Below the table, there is a 'Batches' section. The top navigation bar includes a search bar and various utility icons. The left sidebar also includes a 'Data Import Wizard' link under the 'Integrations' section.

Milestone 7- Customize User Interspace

In this Milestone we have setup the users, customizing the page layout.

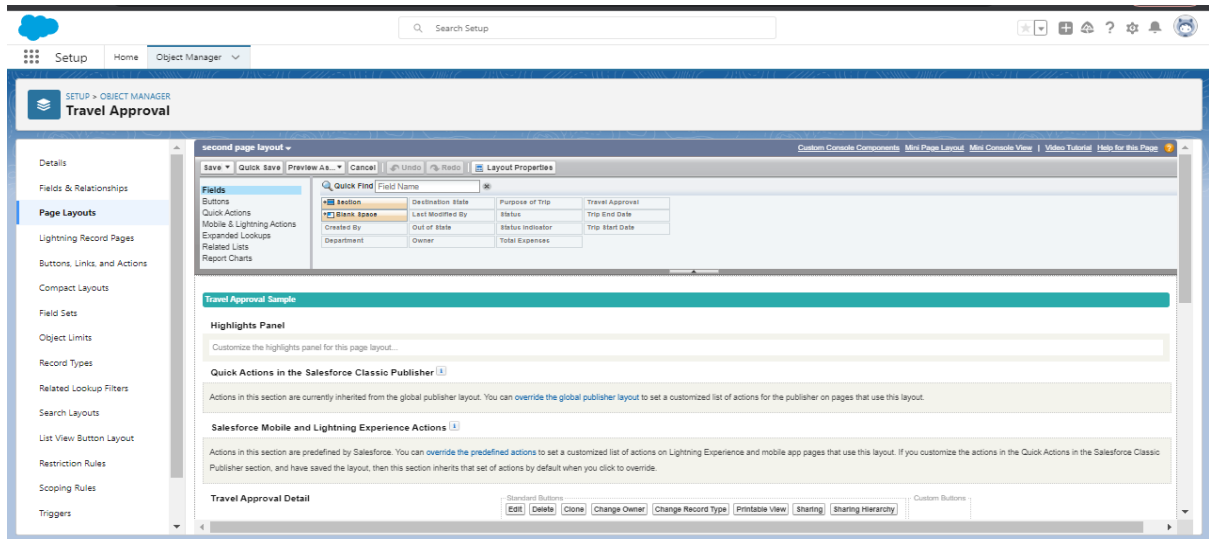


The screenshot shows the Salesforce Setup interface for Users. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the details for a User with Name Anandhi R. The user is currently in a 'Released' state. The user details table shows the following information:

User Detail		Role
Name	Anandhi R	CEO
Alias	AR	User License
Email	anandhiram2002@gmail.com	System Administrator
Username	anandhiram17@gmail.com	Active
Nickname	anandhiram17	Marketing User
Title		Offline User
Company	Government Arts college Autonomous	Knowledge User
Department		Flow User
Division		Service Cloud User
Address	IN	Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver		Data.com User Type
Manager	anandhi.ckid	Accessibility Mode (Classic Only)
Receive Approval Request Emails	Only if I am an approver	Debug Mode
Federation ID		High-Contrast Palette on Charts
App Registration: One-Time Password Authenticator	Connected	Load Lightning Pages While Scrolling
App Registration: Salesforce Authenticator	Connected	Send Apex Warning Emails
Security Key (U2F or WebAuthn)	Connected	Salesforce CRM Content User

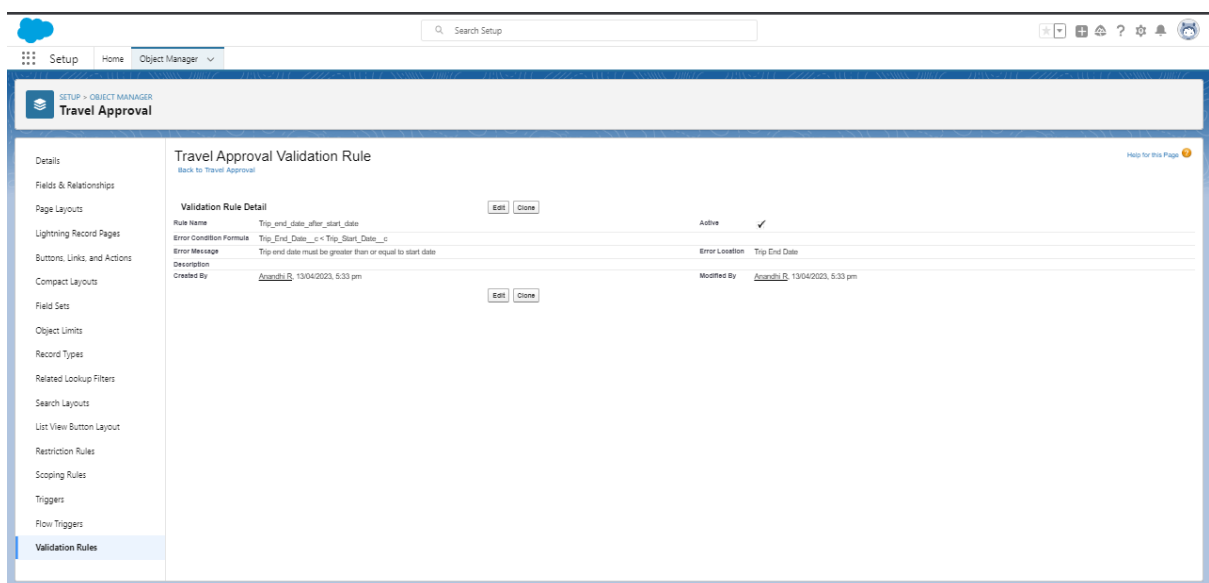
Below the table, there is a 'User Management Settings' section. The top navigation bar includes a search bar and various utility icons. The left sidebar also includes a 'Data.com' link under the 'Feature Settings' section.

Milestone 8 – Use customization



Milestone 9 – Add Business Logic to Travel App

In this Milestone we have created validation rules, rollup summary fields, formula fields, workflows and approval process.



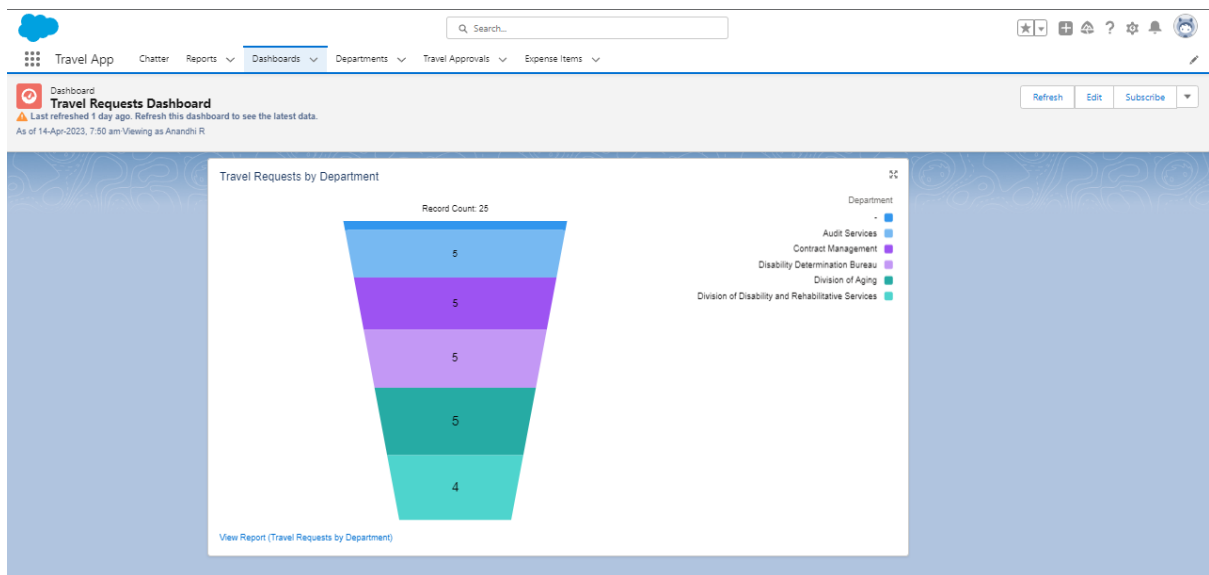
<div> <input type="text" value="Search Setup"/> </div>				
<div> <div>Setup</div> <div>Home</div> <div>Object Manager</div> </div>				
<div> <div> <div> <div>SETUP</div> <div>OBJECT MANAGER</div> </div> </div> <div>Travel Approval</div> </div>				
<div> <div>Details</div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>List View Button Layout</div> <div>Restriction Rules</div> <div>Scoping Rules</div> <div>Triggers</div> <div>Flow Triggers</div> <div>Validation Rules</div> </div>	<div> <div>Fields & Relationships</div> <div>13 Items, Sorted by Field Label</div> <div> <input type="text" value="Quick Find"/> <div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div> </div> </div>			
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD INDEXED
	Created By	CreatedById	Lookup(User)	
	Department	Department__c	Lookup(Department)	✓
	Destination State	Destination_State__c	Text(2)	
	Last Modified By	LastModifiedById	Lookup(User)	
	Out of State	Out_of_State__c	Checkbox	
	Owner	OwnerId	Lookup(User/Group)	✓
	Purpose of Trip	Purpose_of_Trip__c	Text Area(255)	
	Status	Status__c	Picklist	
	Status Indicator	Status_Indicator__c	Formula (Text)	
	Total Expenses	Total_Expenses__c	Roll-Up Summary (SUM Expense Item)	
	Travel Approval	Name	Auto Number	✓
	Trip End Date	Trip_End_Date__c	Date	
	Trip Start Date	Trip_Start_Date__c	Date	

<div> <input type="text" value="Search Setup"/> </div>				
<div> <div>Setup</div> <div>Home</div> <div>Object Manager</div> </div>				
<div> <div> <input type="text" value="Static"/> </div> <div> <div>Custom Code</div> <div>Static Resources</div> </div> <div> <div>Didn't find what you're looking for?</div> <div>Try using Global Search.</div> </div> </div>				
<div> <div> <div> <div>SETUP</div> <div>Static Resources</div> </div> </div> <div>Static Resources</div> <div> <div>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.</div> <div> <div>View: [All]</div> <div>Create New View</div> </div> <div> <div>A</div><div>B</div><div>C</div><div>D</div><div>E</div><div>F</div><div>G</div><div>H</div><div>I</div><div>J</div><div>K</div><div>L</div><div>M</div><div>N</div><div>O</div><div>P</div><div>Q</div><div>R</div><div>S</div><div>T</div><div>U</div><div>V</div><div>W</div><div>X</div><div>Y</div><div>Z</div><div>Other</div><div>All</div> </div> <div> <div> <div>Action</div> <div>Name</div> <div>Namespace Prefix</div> <div>Description</div> <div>MIME Type</div> <div>Size</div> <div>Created By Alias</div> <div>Created Date</div> <div>Last Modified Date</div> <div>Cache Control</div> </div> <div> <div> <div>Edit</div> <div>Del</div> </div> <div>Status/Changes</div> <div>application/vnd-zip-compressed</div> <div>39,130</div> <div>AR</div> <div>14/04/2023</div> <div>14/04/2023, 7:19 am</div> <div>Public</div> </div> </div> </div> </div>				

Milestone 10- Reports

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Travel Requests by Department		Public Reports	Anandhi R	14/4/2023, 7:43 am	

Milestone 11- Dashboard



4. Trailhead Profile Public URL

Team Lead – <https://trailblazer.me/id/mkumar2908>

Team Member 1- <https://trailblazer.me/id/aramu-20bma001>

Team Member 2- <https://trailblazer.me/id/spriya575>

Team Member 3- <https://trailblazer.me/id/pprasanth34>

5. Advantages:

- New experience
- Gain my knowledge
- Quick service

Disadvantages:

- It will be time consuming
- Team coordination will it cause in convenient

6. APPLICATIONS:

The Travel Support System is a small sample application for Natural ONE. As a sample application, its focus is to show Natural ONE functionality rather than being a full-fledged travel support application.

The Travel Support System (TSS) allows as to request and approve business trips. Flights, hotels and even more external information such as cell phone expenses or car rentals can be entered with the trip request. For the destination, weather information can be queried. A manager can do both, request own trips as well as approve trips that have been requested by employees. After the manager has approved single or multiple requests, the manager can print an itinerary or receive the itinerary as a PDF file.

7. CONCLUSION:

Travel Management simplifies the management process in traveling. Fast processing and immediate results with high security. Minimizing women effort and cost efficient databases. Navigation through the site is easy. It becomes increasingly popular destinations in their own right.

8. FUTURE SCOPE:

It is clear that the online travel business is a booming industry and will continue to be so. Rising to the occasion, even small travel agency owners are also looking to go online. For them, an online travel portal can be an ideal fit.