

# BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

## 1 INDRODUCTION:

### 1.1 OVERVIEW

Another research revealed that travelers turn to a wide range of apps more regularly when they have a definite plan of where they need to go. Such users demand to be communicated on a regular basis via push messages, in-app chats, notifications sent before during and after the trip. These expectations present agencies with many opportunities to increase engagement. These years users install tools not only to evaluate their choices but complete the target activity. 81.8% install-to-reserve rate supports this idea, revealing that users rely on a mobile/web solution to make a booking. Even though the value of such a transaction remains unknown, it is stated that the cost to acquire such a user is around \$5.51

Creating business travel approval workflow is one of the most crucial steps in preparing the organization for an efficient and effective Business travel management system. It offers many benefits concerning better traveler experience, reduced work burden for the travel admins desk and savings for the organization. The CFO's usually form a small working group from the respective department; HR and Travel Admin to assess their current business travel workflow and redesign it. However, the best advice can come from Corporate Travel Management Solutions providers who are experts in designing a process based on the best practices and the organization's need for customization. In today's fast-paced world, enabling multiple device interfaces like mobile, laptop and tabs go a long way in offering convenience to the traveler and making the process faster.

### 1.2 PURPOSE

ACHIEVED BY THIS PROJECT

- Boost morale. The promise of a vacation to a hot destination, like San Diego, is usually enough to keep any employee's morale high.
- Relieve stress. The vacations themselves also serve as a form of stress reliable
- Absence makes the heart grow fonder. No matter how fun and welcoming your office is, everyone needs some time away.
- Exposure to new cultures.

**USES:**

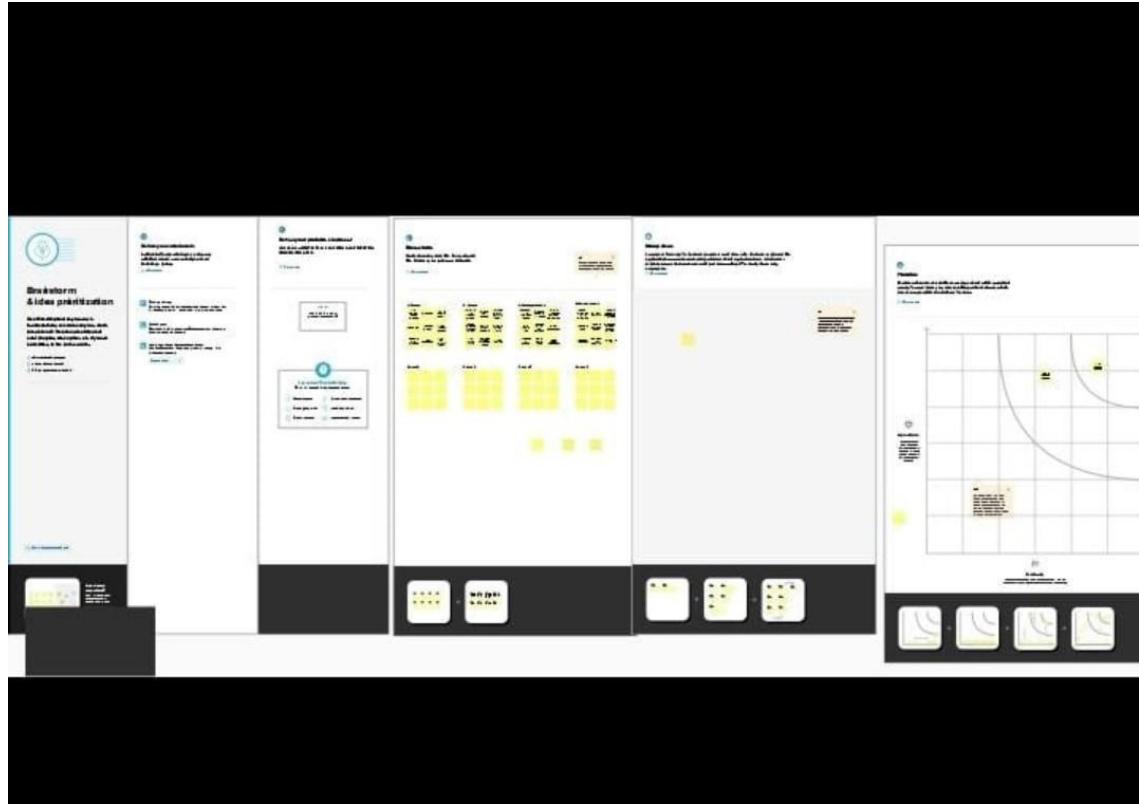
As our employee, you may need to travel for company purposes. This includes trips to:

Meet with clients or partners. Attend events, like conferences, where you'll represent our company. Visit our company's offices in other locations. Conduct research or give talks/ lectures/ presentations on behalf of our company.

## 2 PROBLEM DEFINITION AND DESIGN 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 LABLE	DATA TYPE
	CREATED BY	LOOKUP(USER)
	DEPARTMENT	TEXT(80)
	OWNER	LOCKUP(USER,GROUP)

	TRAVEL REQUESTS	TEXT(67)	
	TRIP END DATE	DATE	
TRAVEL APPROVAL	FIELD LABEL	DATA TYPE	
	CREATED BY	LOOKUP(USER)	
	DEPARTMENT	TEXT(8)	
	DESTINATION	GEOLOCATION	
	DATE		
	OUT OF STATE	GEOLOCATION	
	TRAVEL APPROVAL#	AUTONUMBER	

### 3.2 ACTIVITY AND SCREENSHOT MILESTONES

The image shows two screenshots of the Salesforce interface. The top screenshot is the 'Setup Home' page, featuring a sidebar with links like 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', and 'Optimizer'. The main area has sections for 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs', each with a 'Get Started' button. The bottom screenshot is a 'trips Validation Rule' page, showing a table with columns for 'Rule Name', 'Error Condition Formula', 'Error Message', 'Description', 'Created By', 'Modified By', and 'Active'. The rule name is 'Travel\_end\_date\_after\_start\_date', the formula is 'Trip\_end\_date\_\_c < Trip\_start\_date\_\_c', and the message is 'Trip\_End\_Date\_\_c<Trip\_Start\_Date\_\_C.'. The status is 'Active'. The bottom of the page includes a 'Validation Rule Detail' section with 'Edit' and 'Clone' buttons, and a 'Help for this Page' link.

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

SETUP Home

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

1 items

NAME TYPE OBJECT

salesforce

Search... Search

Switch to Lightning Experience Bakkiyalakshmi... Setup Help Content

Home Chatter Libraries Content Subscriptions departments expensive items travel approvals +

Tell Me More Check Readiness

trips Validation Rule

Back to trips

Help for this Page

Rule Name	Active
Travel_end_date_after_start_date	
Error Condition Formula	Trip_end_date__c < Trip_start_date__c
Error Message	Trip_End_Date__c<Trip_Start_Date__C.
Description	Bakkiyalakshmi_Bakkiyalakshmi_A, 11/04/2023, 10:41 am
Created By	Bakkiyalakshmi_Bakkiyalakshmi_A, 11/04/2023, 10:41 am
Modified By	Bakkiyalakshmi_Bakkiyalakshmi_A, 11/04/2023, 10:41 am

Validation Rule Detail

Edit Clone

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administrator

15:14 10-04-2023

New Custom Object | Salesforce +

drmrgovernmentartsandsci47-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Cloud Search Setup Object Manager

Setup Home Object Manager

SETUP New Custom Object

Enable Licensing

**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

Save Save & New Cancel

This screenshot shows the Salesforce Setup interface for creating a new custom object. The top navigation bar includes links for Setup, Home, and Object Manager. The main page title is "New Custom Object". The configuration form contains several sections: "Object Classification" (with checkboxes for Allow Sharing, Bulk API Access, and Streaming API Access), "Deployment Status" (with a radio button for "Deployed"), "Search Status" (with a checkbox for "Allow Search"), and "Object Creation Options" (with checkboxes for adding notes/attachments and launching the New Custom Tab Wizard). At the bottom right of the form are three buttons: "Save", "Save & New", and "Cancel".

Travel Approval - Lightning App

Lightning App Builder App Settings Pages Travel Approval ? Help

### App Details & Branding

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\_s

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

**App Launcher Preview**

New Tab department You cannot... 4 Ways to... Lightning Recently Visited trips | Sales New Tab

drmgrgovernmentartsandsc-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003cOL6/FieldsAndRelationships

Setup Home Object Manager

SETUP > OBJECT MANAGER department

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

**Fields & Relationships**  
4 Items, Sorted by Field Label

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

https://drmgrgovernmentartsandsc-9a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw000003cOL6/FieldsAndRelationships/LastModifiedBy/view

The screenshot shows the Salesforce Object Manager interface. A new field is being created for the 'travel approval' object. The field is named 'total expenses' with the API name 'total\_expenses'. It has a description and help text. Sharing settings are configured to 'Read Only' and 'ReadWrite'. The 'Allow reparenting' and 'Auto add to custom report type' options are checked. The status bar at the bottom indicates it's 15:48 on 10-04-2023.

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

Field Label: total expenses

Field Name: total\_expenses

Description:

Help Text:

Child Relationship Name: travel\_approvals

Sharing Setting: Select the minimum access level required on the Master record to create, edit, or delete related Detail records.

Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting:  Child records can be reparented to other parent records after they are created

Auto add to custom report type:  Add this field to existing custom report types that contain this entity

The screenshot shows the Salesforce Object Manager interface for the 'Expensive item' object. The details page is displayed, showing fields like API Name ('Expensive\_item\_\_c'), Singular Label ('Expensive item'), and Plural Label ('Expensive items'). Various settings are listed on the right, including 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status' (Deployed), 'Help Settings', and 'Standard salesforce.com Help Window'.

SETUP > OBJECT MANAGER  
Expensive item

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

Description:

API Name: Expensive\_item\_\_c

Custom: ✓

Singular Label: Expensive item

Plural Label: Expensive items

Edit Delete

Enable Reports

Track Activities

Track Field History

Deployment Status: Deployed

Help Settings

Standard salesforce.com Help Window

Salesforce Tabs | drmrgovtartsandscienceco-d-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3...

Setup Home Object Manager

## Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

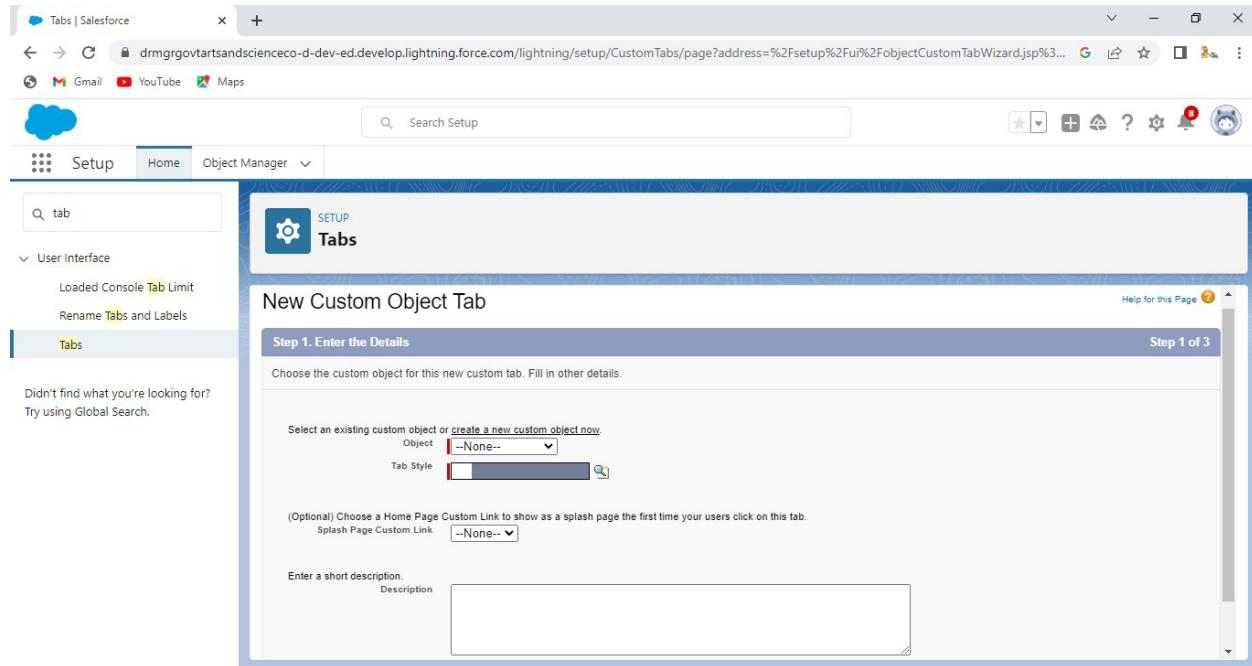
Object: -None- Tab Style:

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: -None-

Enter a short description.

Description:



Salesforce Tabs | drmrgovtartsandscienceco-d-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home

Setup Home Object Manager

## Tabs

### Custom Tabs

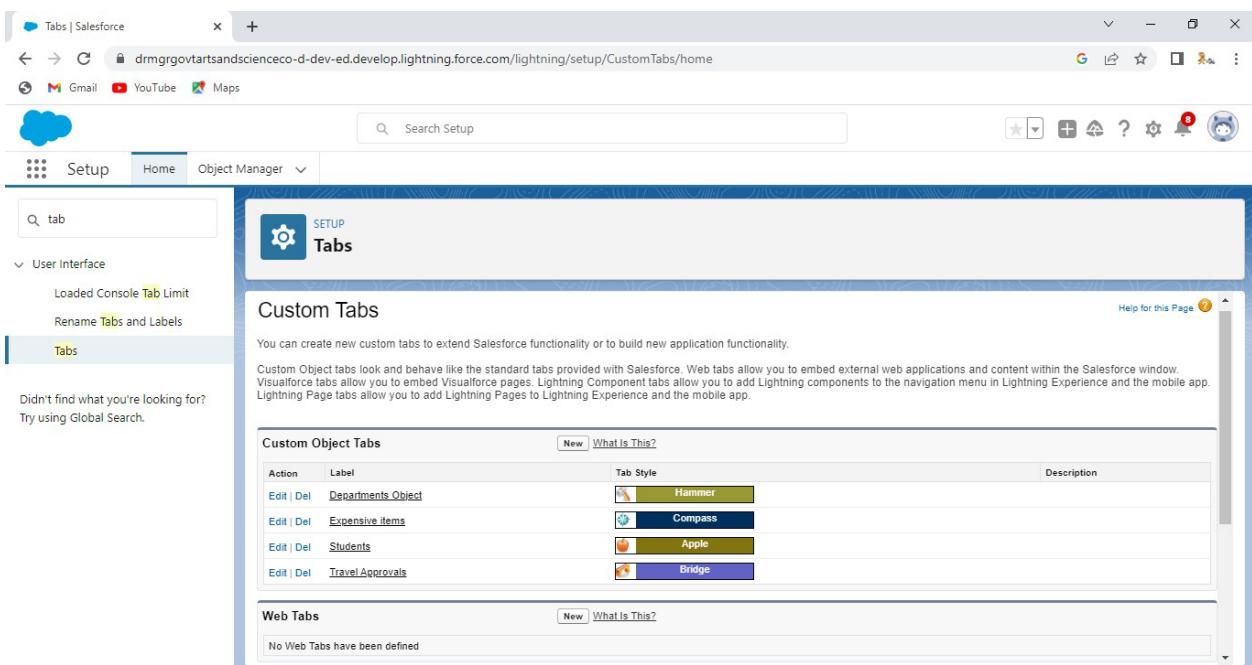
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

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.

Action	Label	Tab Style	Description
Edit   Del	Departments Object	Hammer	
Edit   Del	Expensive Items	Compass	
Edit   Del	Students	Apple	
Edit   Del	Travel Approvals	Bridge	

### Web Tabs

No Web Tabs have been defined



Student | Salesforce

drmrgovtartsandscienceco-d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lw00000441ZkD/Details/view

Gmail YouTube Maps

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Student

**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

**Details**

Description

API Name: Student\_c  
Custom: ✓  
Singular Label: Student  
Plural Label: Students

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

Edit Delete

Home | Salesforce

drmrgovtartsandscienceco-d-dev-ed.develop.lightning.force.com/lightning/setup/DataManagementDataImporter/home

Gmail YouTube Maps

Cloud Search Setup

Setup Home Object Manager

Great job!

Choose data Edit mapping Start import

Review & Start Import  
Review your import information and click Start Import.

Your selections:

- Departments Object ✓
- Add new records ✓
- Departments.csv ✓

Your import will include:

Mapped fields: 1

Unmapped fields: 1

Cancel Previous Start Import

Travel Approval | Salesforce

drmgrgovtartsandscienceco-d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l2w0000043zF8/FieldsAndRelationships/page?address...

Gmail YouTube Maps

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 Restriction Rules Scoping Rules Triggers Flow Triggers Validation Rules

Edit Travel Approval Custom Field Total Expenses

Custom Field Definition Edit

Field Information

Field Label: Total Expenses  
Field Name: Total\_Expenses  
Description:   
Help Text:   
Data Owner: User  
Field Usage: None  
Data Sensitivity Level: None  
Compliance Categorization: Available: HIPAA, GDPR, PCI Chosen:

Roll-Up Summary Options

Data Type: Roll-Up Summary  
Calculation Options:  Automatic calculation (Recommended)  Force a mass recalculation of this field

Select Object to Summarize

Master Object: Travel Approval  
Summarized Object: Students

Select Roll-Up Type

Travel Approval | Salesforce

Static Resources | Salesforce

drmgrgovtartsandscienceco-d-dev-ed.develop.lightning.force.com/lightning/setup/StaticResources/page?address=%2F0812w000002upZp%2Fe%3FretURL%3D%2...

Gmail YouTube Maps

Setup Home Object Manager

Q static

Custom Code Static Resources

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

SETUP Static Resources

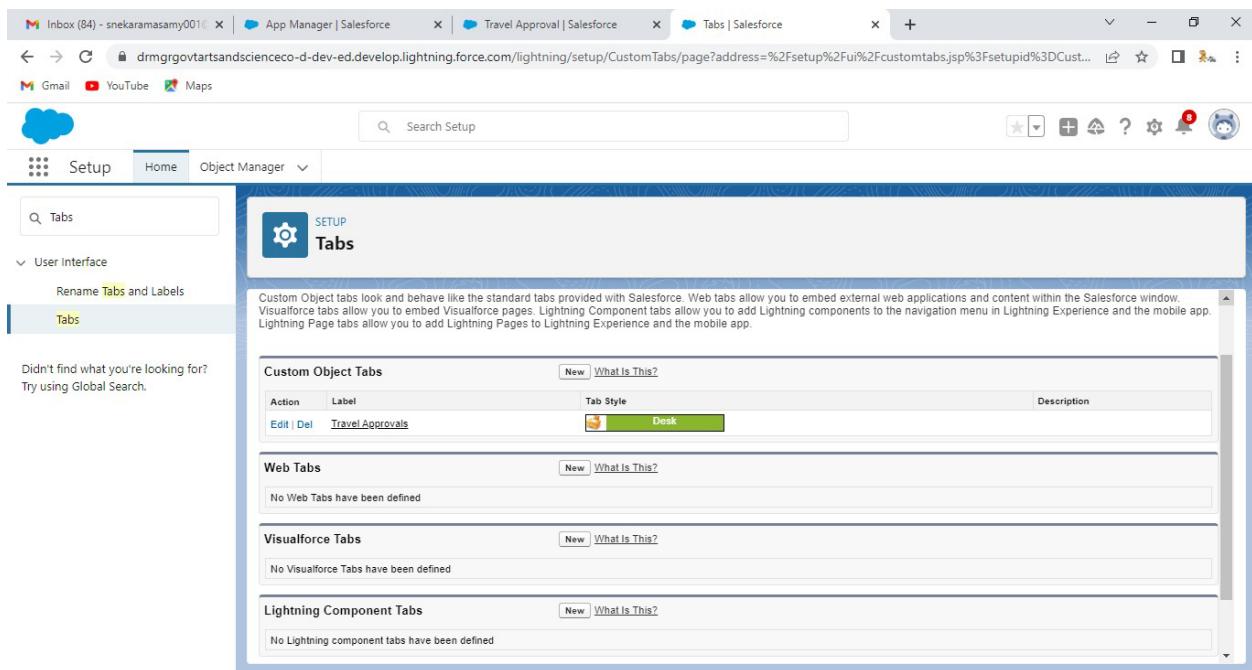
StatusImages

Static Resource Edit

Static Resource Information

Name: StatusImages  
Description:   
File: Choose File StatusImages.zip  
Cache Control: Public

Save Cancel



## 4 TRAILHEAD PROFILE PUBLIC URL

TEAM LEADER: <https://trailblazer.me/id/pperiyasamy3>

TEAM MEMBER 1: <https://trailblazer.me/id/kfranco32>

TEAM MEMBER 2: <https://trailblazer.me/id/moraj76>

TEAM MEMBER 3 : <https://trailblazer.me/id/rppan3>

## **5 ADVANTAGES AND DISADVANTAGES**

Advantages and benefits of workplace travel plans. Operating a workplace travel plan can bring many benefits for your business and your staff. In particular, it will save your business money and reduce the impact it has on the environment eg by reducing CO2 emissions.

METHOD	ADVANTAGES	DISADVANTAGES
Internal recruitment	A quick process Applicants will already know the business	Usually a small pool of applicants
External recruitment	May bring new ideas into the business	Takes time to settle into the business
Recruitment agencies	Find high quality applicants Often a costly option	Can be expensive to use Many fees
Media selection	Can be either cheap or expensive Can reach a wide audience	Potential applicants may not apply

## **6 APPLICATIONS:**

- providing travel
- reimbursing travel

- accommodation (if your employee needs to stay away overnight)
- meals and other 'subsistence' while travelling

## **7 CONCLUSION:**

Travel motivates are the energizer of action, they are diverse and multifaceted.

Consequently, a range of researches and approaches may provide conflicting answers given that the behavior of tourists in pre,during and post travel are varied.

No simple explanation about why people take vacation,thus it is a process of understanding the psychology of tourist based upon the W's and H questions – who,what, where, when,why and how.

Different types of tourist can have different characteristic.

## **8 FUTURE SCOPE:**

This may include extended project work, shorter-term commuting arrangements and business travel. Naturally the scope varies from organisation to organisation depending on a number of factors, e.g. risk appetite, maturity of the program, existing business traveller processes and technology.