

BUILD AN EMPLOYEE TRAVEL **APPROVAL APPLICATION FOR** **CORPORATES**

Project Presented By

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INTRODUCTION

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 cumbersome task for the HR and travel departments. That's why Many corporates have started Using employ travel approval applications to streamline the process.

Purpose :

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

THEORETICAL ANALYSIS

Creation Of Department Object For Travel Approval App

For this Travel Approval we need to create 5 objects Department, Employee Detail, Expense, Expense Items, and Travel Approval. The below steps will assist you in creating those objects.

Steps To Create Department Object:

- 1) Click on the gear icon and then select Setup.*
- 2) Click on the object manager tab just beside the home tab.*
- 3) After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.*
- 4) On the Custom Object Definition page, create the object as follows:*
- 5) Label: Department*
- 6) Plural Label: Departments*
- 7) Record Name: Department Name*
- 8) Check the Allow Reports checkbox*
- 9) Check the Allow Search checkbox*
- 10) Click Save.*

In the same way create 4 more objects Employee Detail, Expense, Expense Items, and Travel Approval

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

5 Label Example: Account

6 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

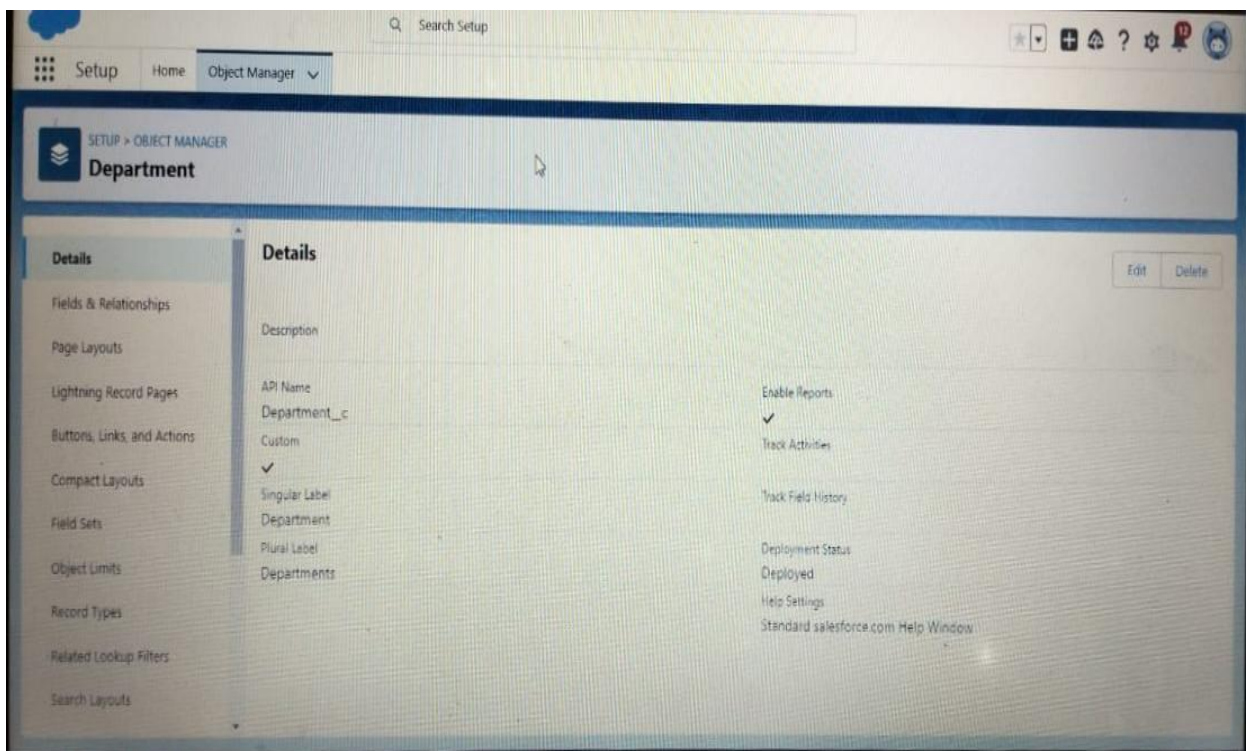
Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

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 Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

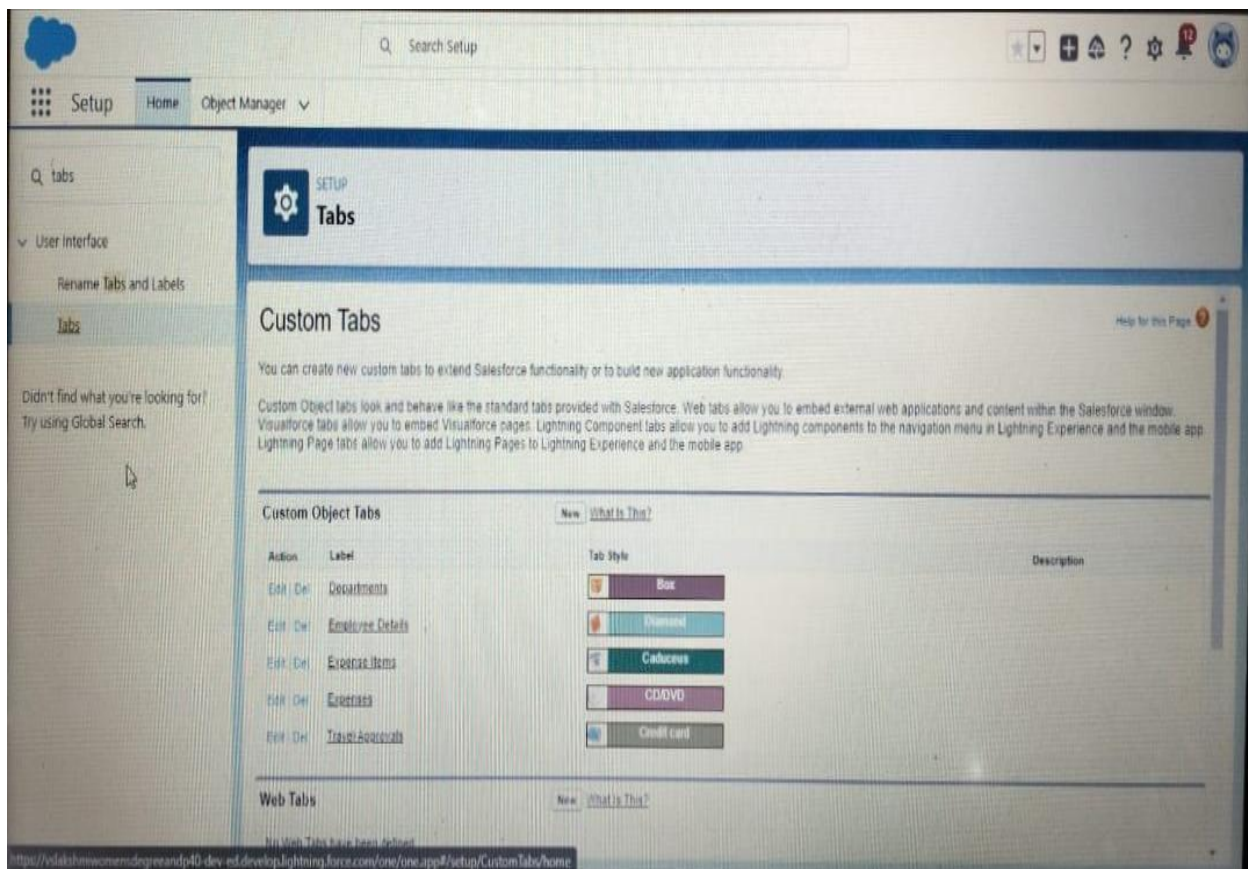
7 Record Name Example: Account Name



Custom Tab Creation

Now create a custom tab. Click the Home tab.

1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Department.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save
6. In the same way create Tabs for all Custom Objects – Employee Detail, Expense, Expense Items, Travel Approval.

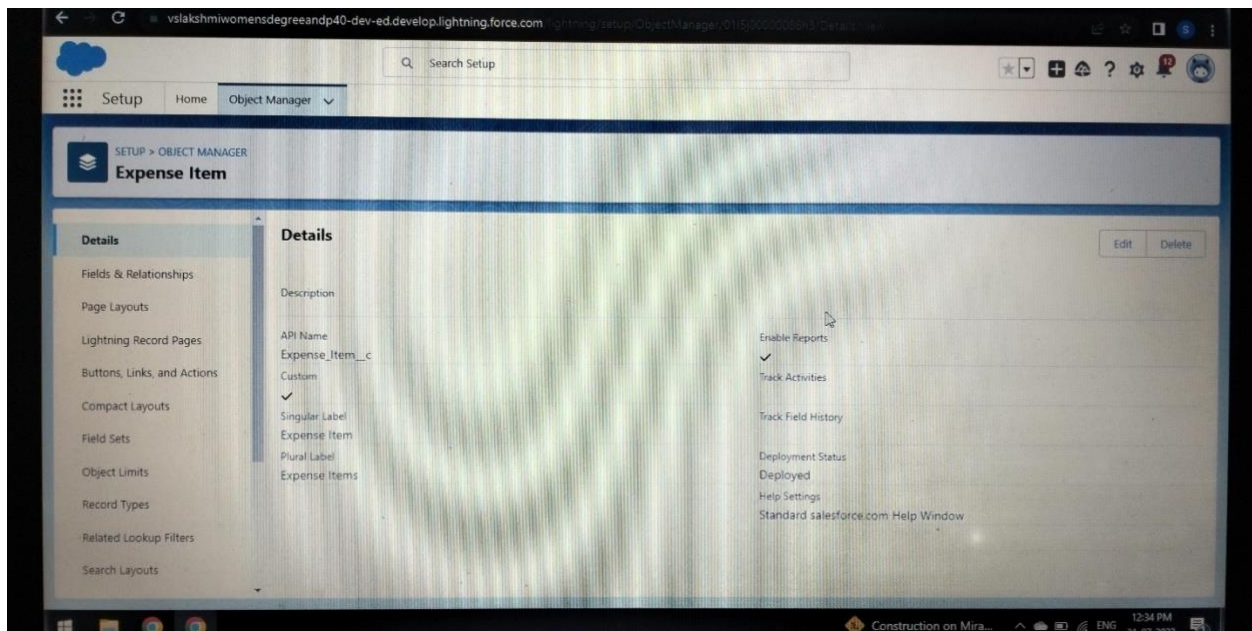


Lightning App :

Apps in Salesforce are a group of tabs that helps the application function by working together as a unit. It has a name, a logo , and a particular set of tabs. The simplest tab usually has just two tabs.

Fields and Relationship :

An object relationship in Salesforce is a two way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.



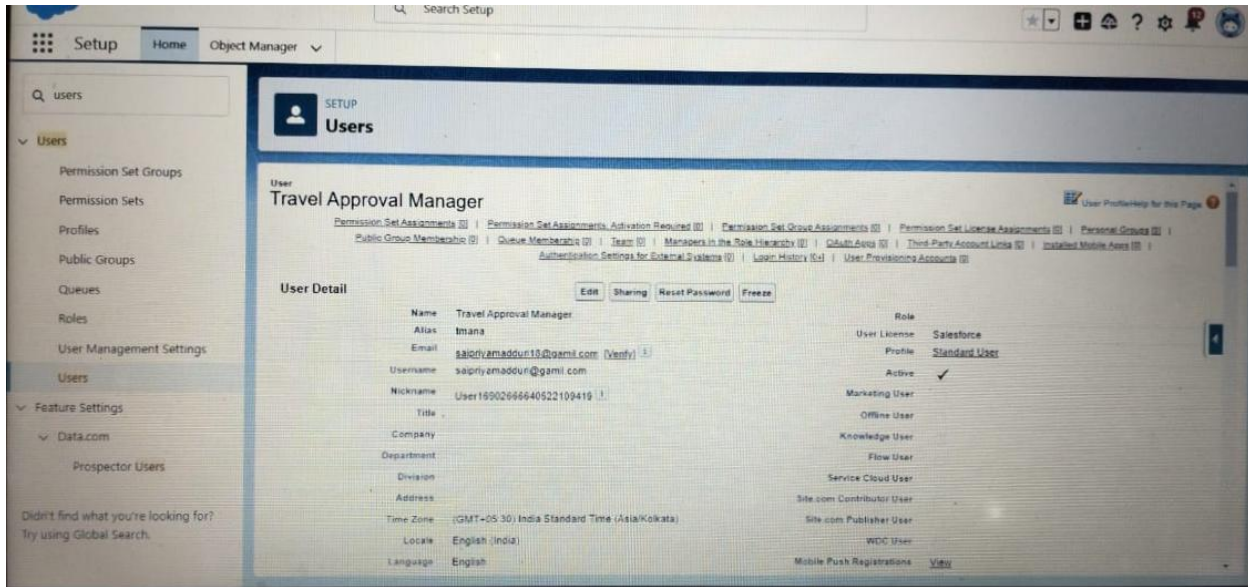
Import Departments :

Departments can be used to categorize records such as accounts , employees , and items. Departments usually indicate groupings of records according to management responsibility. To import Department records, select classification as the import type, and department as the record type.

Before you can import Departments, an administrator, or another user with permission to enable features, must go to setup > company > enable features , and on the company subtab ,check the departments box and click save.

Users :

A user is anyone who logs in to salesforce. Users are employees at your company , such as sales reps , managers , and IT specialist , who need access to the company's records. Every user in salesforce has a user account.



Use Customization :

Customize means adapting products or services to suit specific needs. In customer service, Customization is essential to offer exceptional service and built customer loyalty. Live agent offers easy customization options for tailored experiences, including custom roles and personalized e-mail replies.

User Adoption :

We need to understand user adaption and navigation. How to interact with databases and their records.

Reports and Dashboards :

A report is a list of records that meet the criteria you define. It's displayed in salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Report: Travel Approval with Departments
Travel Approval Report

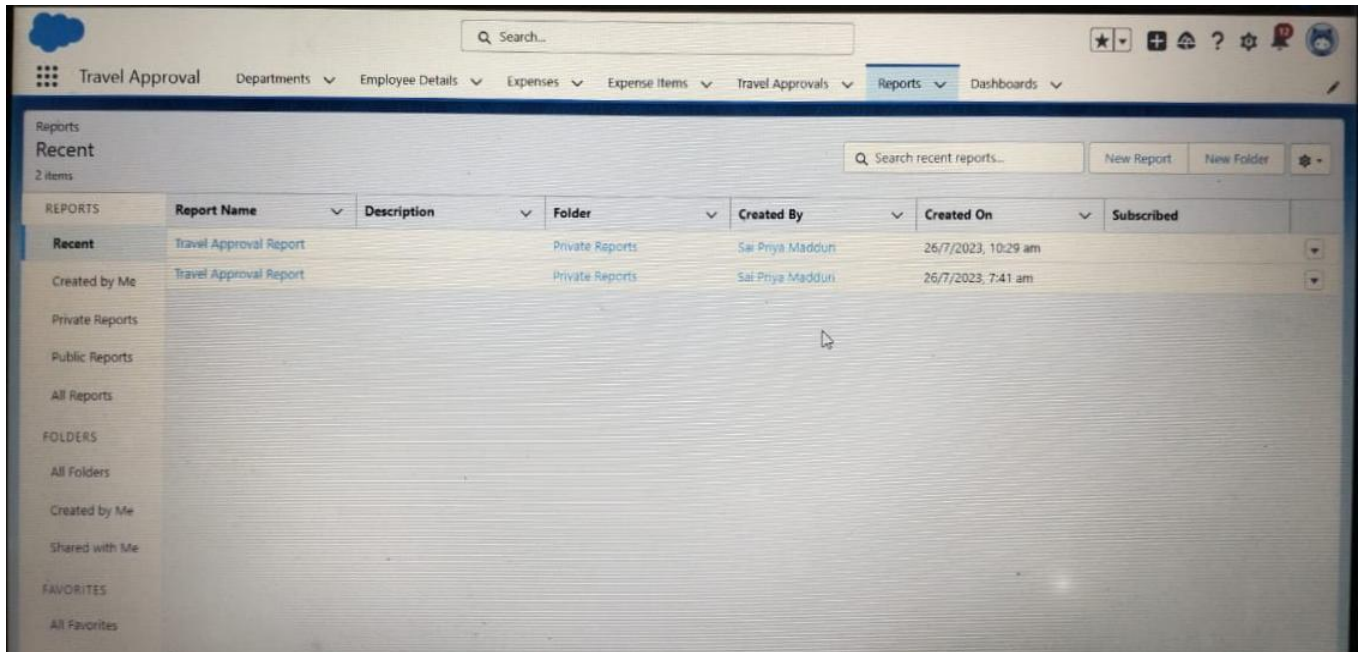
Enable Field Editing

Total Records
2

Department Name	Created By: Full Name	Created Date	Department	Department ID	District	Last Modified By: Full Name	Last Modified Date	Owner: Full Name	School website
travel management (1)	Sai Priya Madduri	26/07/2023	priya	a005j00000MUIH0	east	Sai Priya Madduri	26/07/2023	Sai Priya Madduri	https://www.travel.com
Subtotal									
travel school (1)	Sai Priya Madduri	26/07/2023	sch	a005j00000MUIH5	east	Sai Priya Madduri	26/07/2023	Sai Priya Madduri	
Subtotal									
Total (2)									

Row Counts: Detail Rows Subtotals Grand Total

RESULT



Search...

Travel Approval Departments Employee Details Expenses Expense Items Travel Approvals Reports Dashboards

Reports

Recent

2 items

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Travel Approval Report		Private Reports	Sai Priya Madduri	26/7/2023, 10:29 am	
Created by Me	Travel Approval Report		Private Reports	Sai Priya Madduri	26/7/2023, 7:41 am	

Private Reports

Public Reports

All Reports

FOLDERS

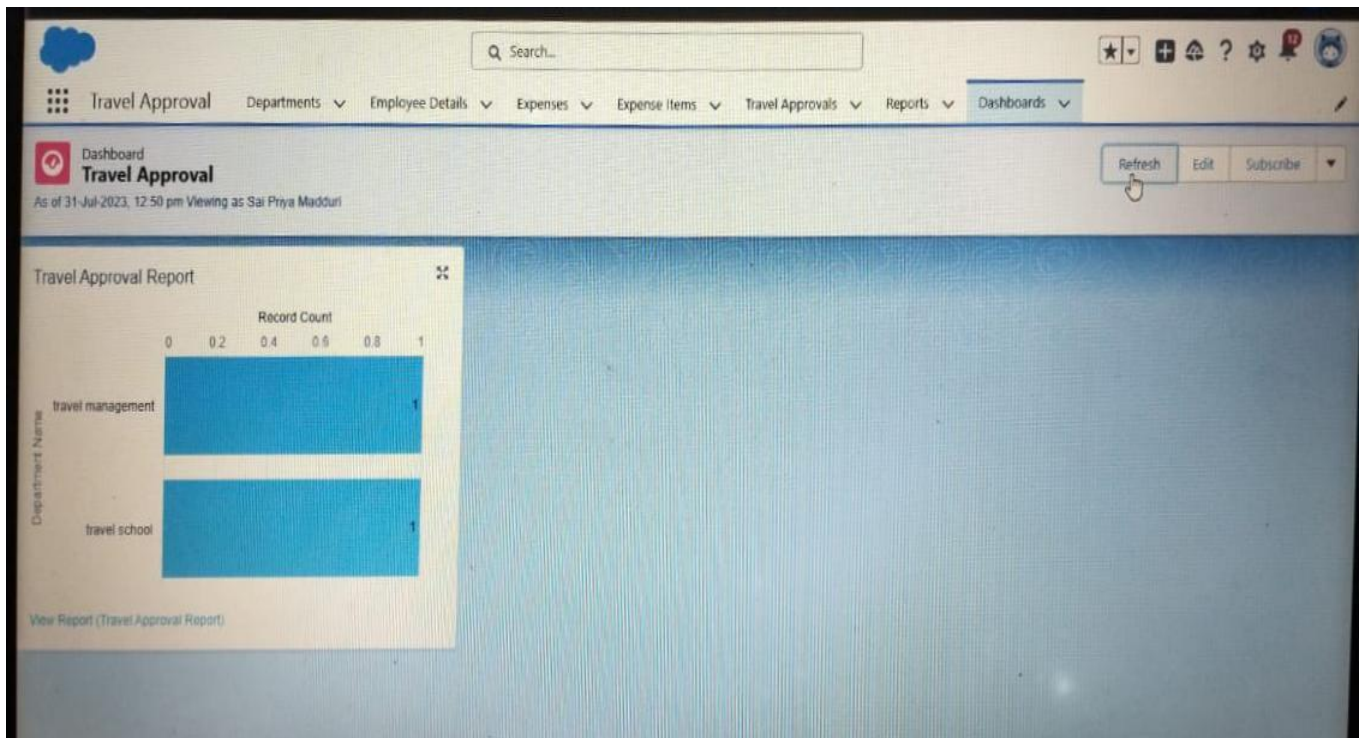
All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites



ADVANTAGES

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

DISADVANTAGES

- *The process include 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*

APPLICATIONS

The application ensures that travel requests comply with the company's travel policies which reduces the risk of non-complaint 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.

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

CONCLUSION

An employee travel approval application 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.

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 fulfil all the needs of the users.*

Overall, the future of travel approval application using Salesforce is very promising, and we can expect to see continued growth and development in the coming years as new technologies and capabilities emerge.