

PROJECT REPORT

BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

1 INTRODUCTION

1.1 OVERVIEW

The Employee Travel Approval application in Salesforce is designed to help corporates streamline their travel approval process. It allows employees to request travel, which then goes through an approval process by managers and travel coordinators.

- **Employee Request:** Employees can create travel requests by filling out a form in the salesforce application. The form typically includes information such as travel dates, destination, purpose, and estimated costs.
- **Approval workflow:** Once the travel request is submitted, it goes through an approval workflow. The workflow is customized to match the organization's approval process, which could include multiple levels of approval.

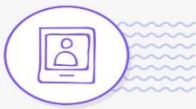
1.2 PURPOSE

Streamlining the travel approval process: With a dedicated travel approval application, employees can submit travel requests online and managers can approve or reject them quickly, without having to go through the hassle of paperwork or emails.

- **Cost control:** A travel approval application can help corporate to keep track of the travel expense and ensure that they are in line with the budget.
- **Compliance:** A travel approval application can help corporate to ensure that all travel requests are in compliance with company policies, regulations and safety guidelines.
- **Employee Satisfaction:** A travel approval application can help to improve the employee experience by providing a more convenient and transparent process for travel request.

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)



Build empathy

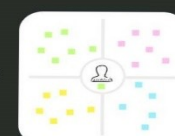
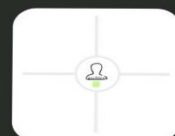
The information you add here should be representative of the observations and research you've done about your users.



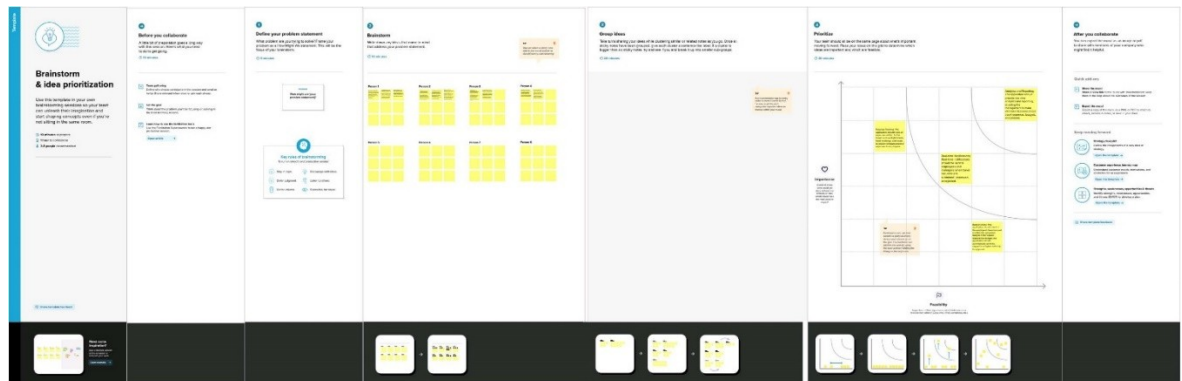
Need some inspiration?

See a finished version of this template to kickstart your work.

[Open example](#)



2.2 IDEATION & BRAINSTORMING MAP



RESULT**3.1 DATA MODEL:**

OBJECT NAME	FIELDS IN THE OBJECT	
Object 1 Travel Approval	Field label	Data type
	Department	Look Up
	Destination State	Text
	Out of State	Check Box
	Purpose of Trip	Text Area
	Trip End Date	Date
	Trip Start Date	Date
	Status	Picklist
	Status Indicator	Formula
	Total Approval Name	Auto Number
	Total Expenses	Roll-Up Summary
Object 2 Department	Department Code	Text
	Department Name	Currency
	Department name	Auto Number
Object 3 Expense Item	Expense Item Number	Auto Number
	Expense Type	Picklist
	Travel Approval	Master-Detail

3.2 ACTIVITY & SCREENSHOT:

Milestone 1- Create Salesforce Org:

Activity-1:

Creating Developer Account

The screenshot shows the Salesforce Developer Edition Sign-up page. The page has a blue background with white text and a white sign-up form on the right. The form includes fields for First Name, Last Name, Email, Username, Password, and Confirm Password. There are also dropdown menus for Role and Company. A checkbox for 'I agree to the Salesforce Terms of Service' is checked. A 'Sign up for free' button is at the bottom of the form. The page also features a list of benefits for building enterprise-quality apps.

Build enterprise-quality apps fast to bring your ideas to life

- Build apps that work drag-and-drop
- Customize your data model with clicks
- Get started with AppExchange
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with a library of any leading-edge web frameworks

Sign up for your Salesforce Developer Edition
A full featured copy of the Platform, for free

Complete this form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name: [text box]
Last Name: [text box]
Email: [text box]
Username: [text box]
Password: [text box]
Confirm Password: [text box]
Role: [dropdown menu]
Company: [text box]
I agree to the Salesforce Terms of Service: ☒

Sign up for free

Already have a Salesforce Developer Environment? [Log in](#)

Activity-2:

Account Activation

The screenshot shows an email from Salesforce with the subject 'Welcome to Salesforce: Verify your account'. The email body contains a 'Verify Account' button and a link to verify the account. The email also includes the username 'santhoshg@gsac.com' and a welcome message.

Welcome to Salesforce: Verify your account

Thanks for signing up with Salesforce! Click below to verify your account. Verify Account To easily log in later, save this URL: <https://thiruvalluvargovernment-2c-dev-ed.develop.my.salesforce.com>

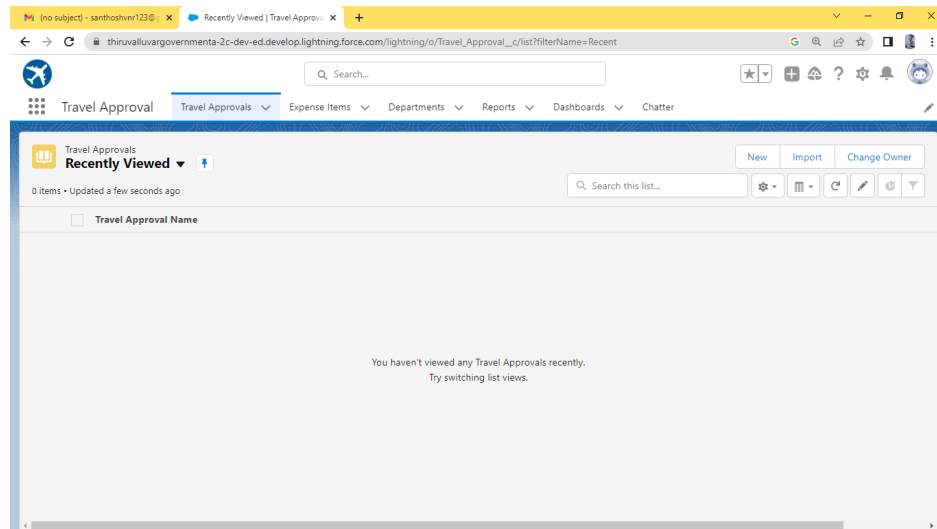
Username: santhoshg@gsac.com

Again, welcome to Salesforce!

Milestone 2- Creating the Application:

Activity-1:

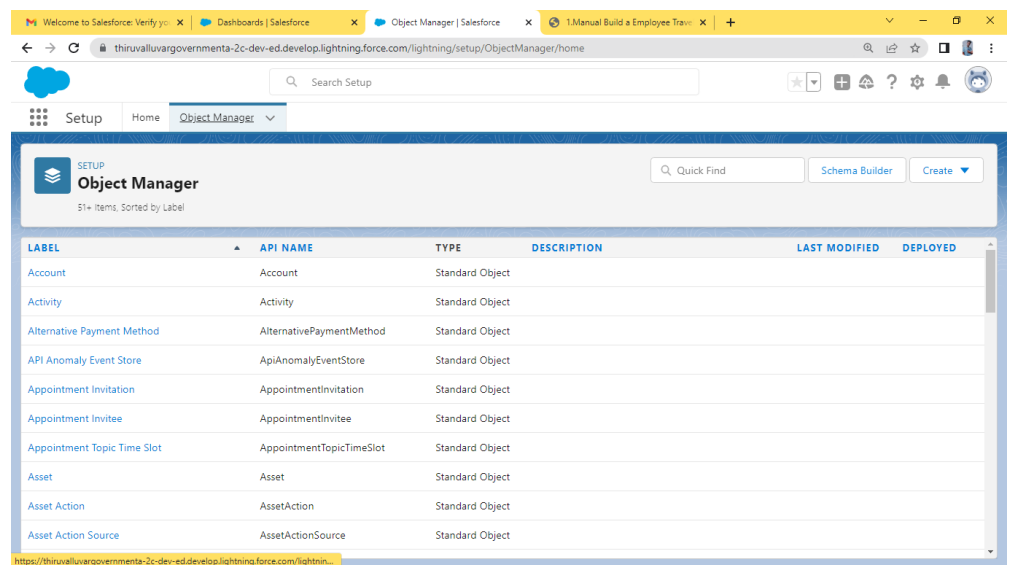
Create the Travel Application



Milestone 3 -What is an object? :

Activity-1:

Custom Object Creation



Activity-2:

Create 3 custom objects and tabs

a) Department

The screenshot shows the Salesforce Setup interface for a custom object named 'Department'. The browser address bar indicates the URL: `thiruvalluvargovernment-2c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HKKU/Details/view`. The page title is 'Department'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' section is active, showing a table of configuration settings. The table has two columns: the first column lists the configuration item, and the second column shows its current value or status. The settings include: Description (empty), API Name (Department__c), Custom (checked), Singular Label (Department), Plural Label (Departments), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), Help Settings (Standard salesforce.com Help Window), and a link to 'Standard salesforce.com Help Window'.

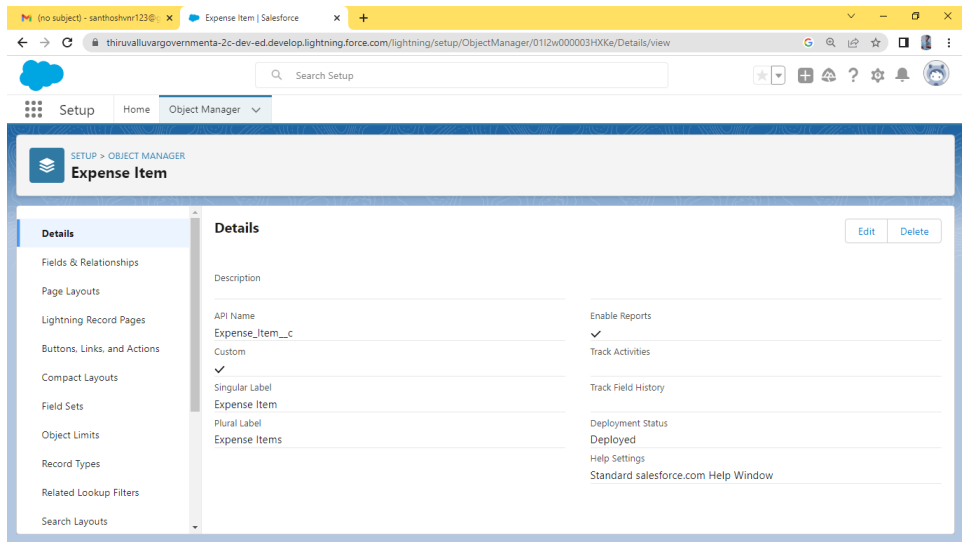
Configuration Item	Value/Status
Description	
API Name	Department__c
Custom	✓
Singular Label	Department
Plural Label	Departments
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window
Standard salesforce.com Help Window	

b) Travel Approval

The screenshot shows the Salesforce Setup interface for a custom object named 'Travel Approval'. The browser address bar indicates the URL: `thiruvalluvargovernment-2c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HKKZ/Details/view`. The page title is 'Travel Approval'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' section is active, showing a table of configuration settings. The table has two columns: the first column lists the configuration item, and the second column shows its current value or status. The settings include: Description (empty), API Name (Travel_Approval__c), Custom (checked), Singular Label (Travel Approval), Plural Label (Travel Approvals), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), Help Settings (Standard salesforce.com Help Window), and a link to 'Standard salesforce.com Help Window'.

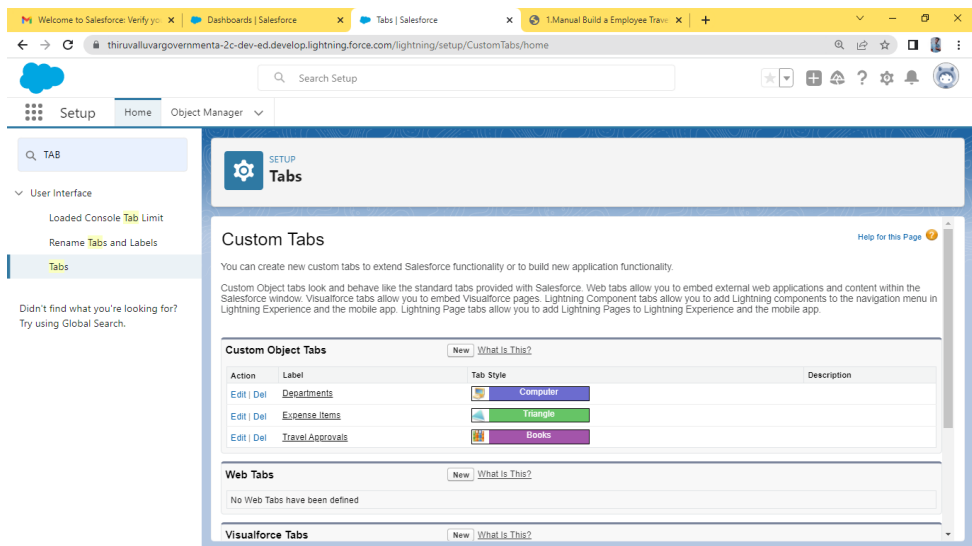
Configuration Item	Value/Status
Description	
API Name	Travel_Approval__c
Custom	✓
Singular Label	Travel Approval
Plural Label	Travel Approvals
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window
Standard salesforce.com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

b) Expense Item



Milestone 4 -What is a Tab? :

Activity-1:



Milestone 5 - Create- Fields & Relationship:

Activity-1:

The screenshot shows the Salesforce Object Manager interface for the 'Department' object. The left sidebar contains a navigation menu with options: Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, and Object Limits. The main content area is titled 'Department' and includes a 'Fields & Relationships' section. This section has a search bar, a 'Quick Find' button, and tabs for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below these, a table lists the fields for the Department object.

Field Label	Field Name	Data Type	Controlling Field	Indexed
Created By	CreatedById	Lookup(User)		
Department Code	Department_Code__c	Text(10) (Unique Case Sensitive)		✓
Department Name	Department_Name__c	Currency(16, 2)		

Activity-2:

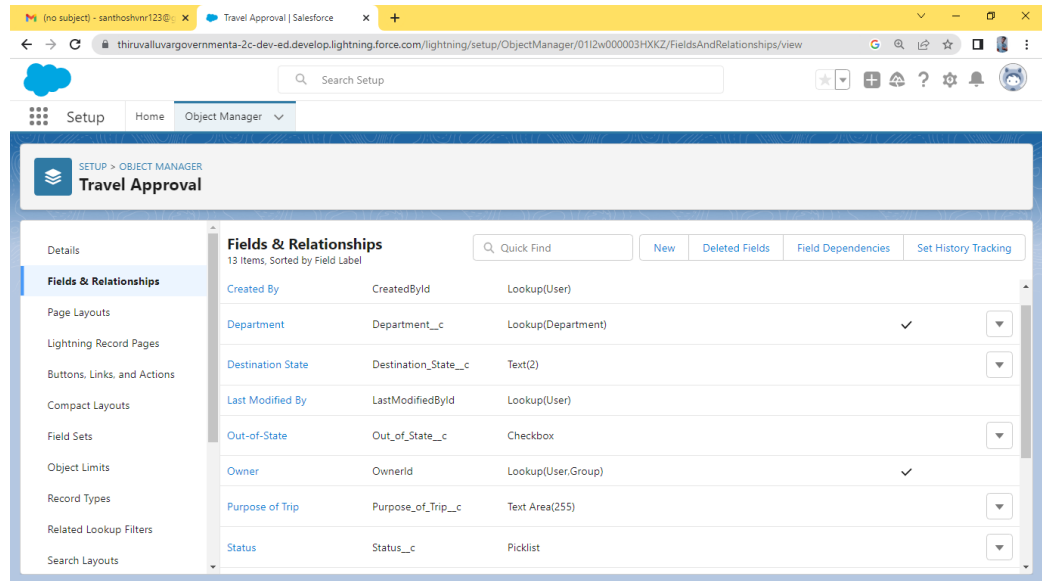
Create the Expense Type field.

The screenshot shows the Salesforce Object Manager interface for the 'Expense Item' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Expense Item' and includes a 'Fields & Relationships' section. This section has a search bar, a 'Quick Find' button, and tabs for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below these, a table lists the fields for the Expense Item object.

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)		✓

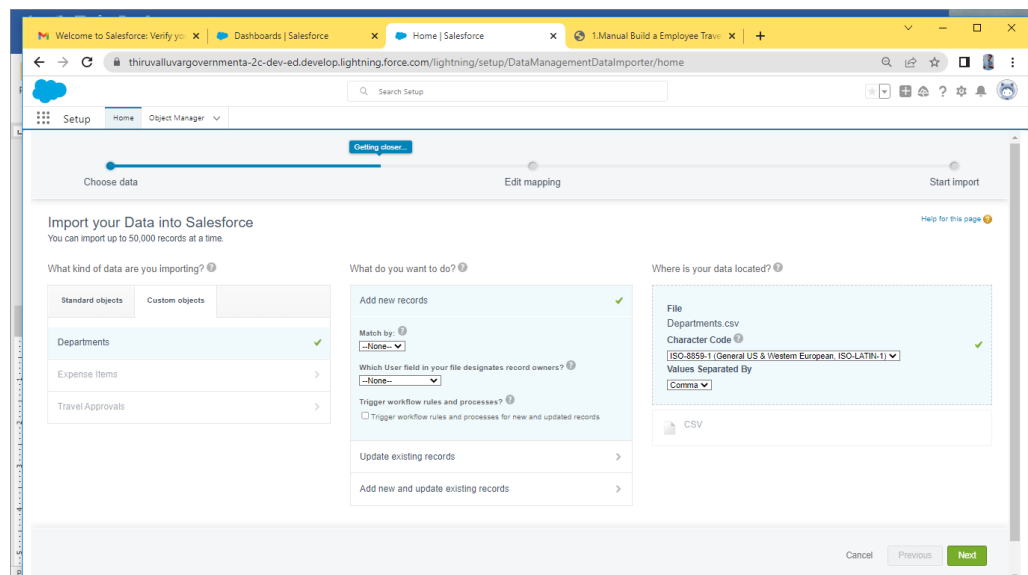
Activity-3:

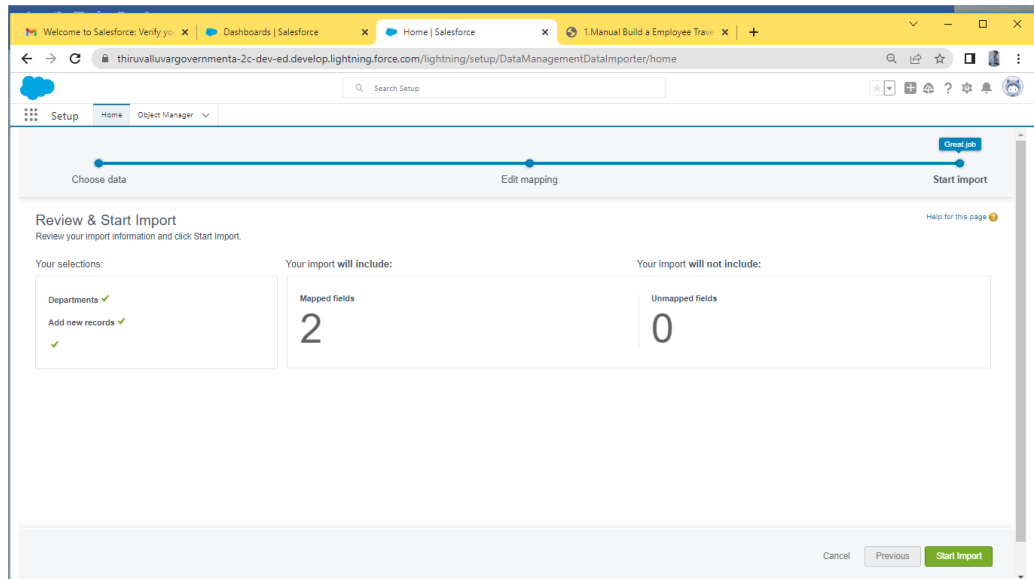
Create the Travel Approval field.



Milestone 6 -Import Departments:

Activity-1:

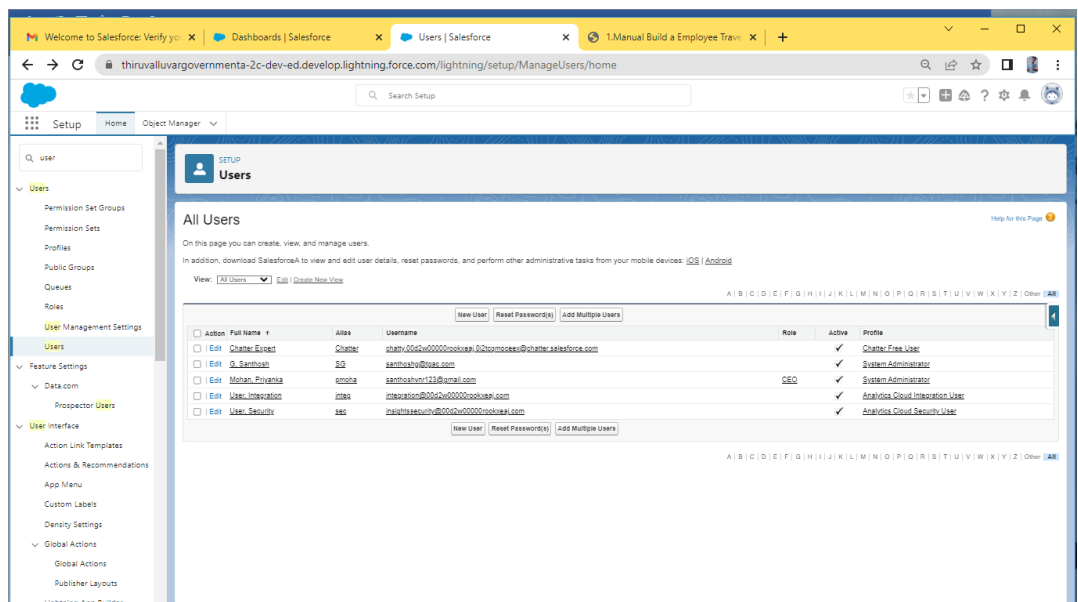




Milestone 7 - Customize User Interface:

Activity-1:

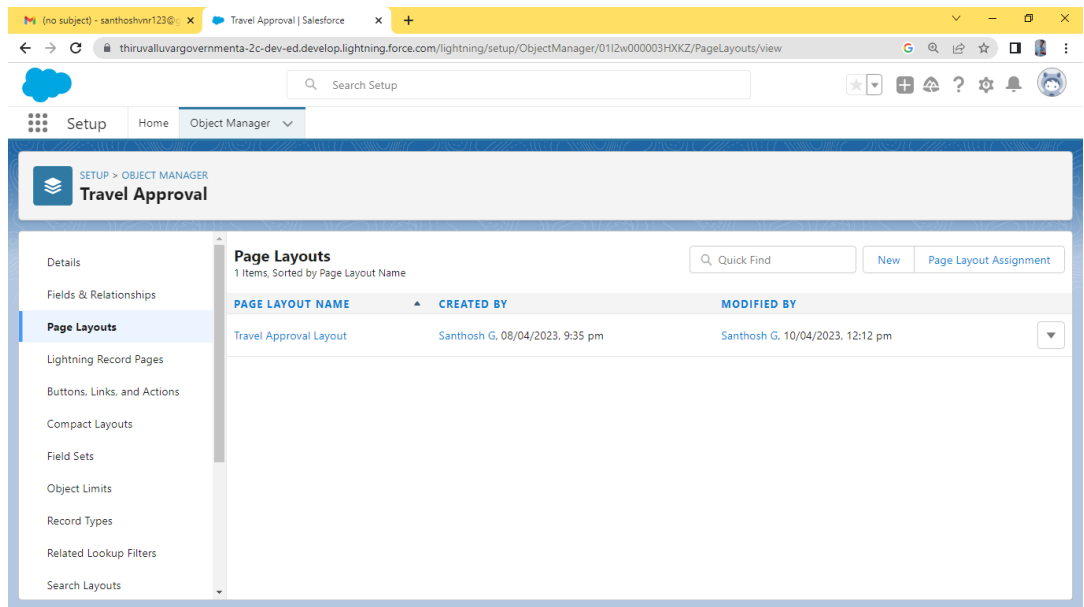
Create User and Setup Approval



Milestone 8 - Use customization:

Activity -1:

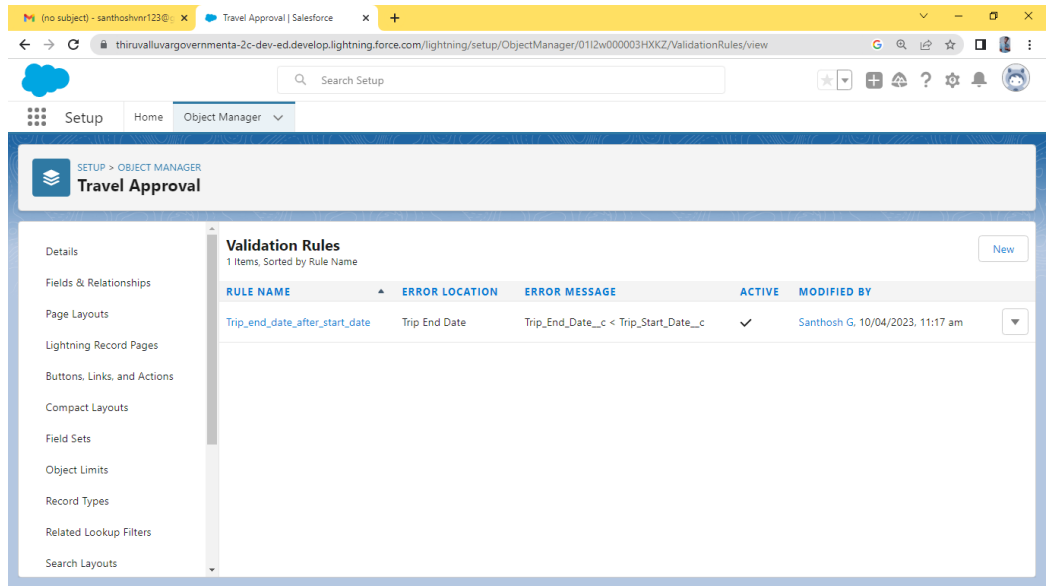
Customize Travel Approval Object Page layout



Milestone 9 - Add Business Logic to Travel App:

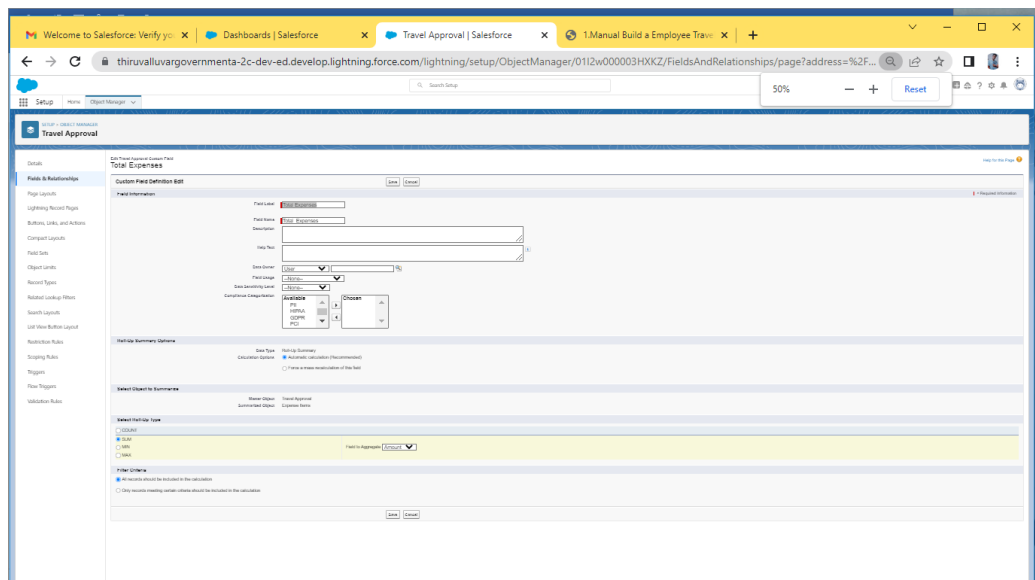
Activity-1:

Create Validation Rule



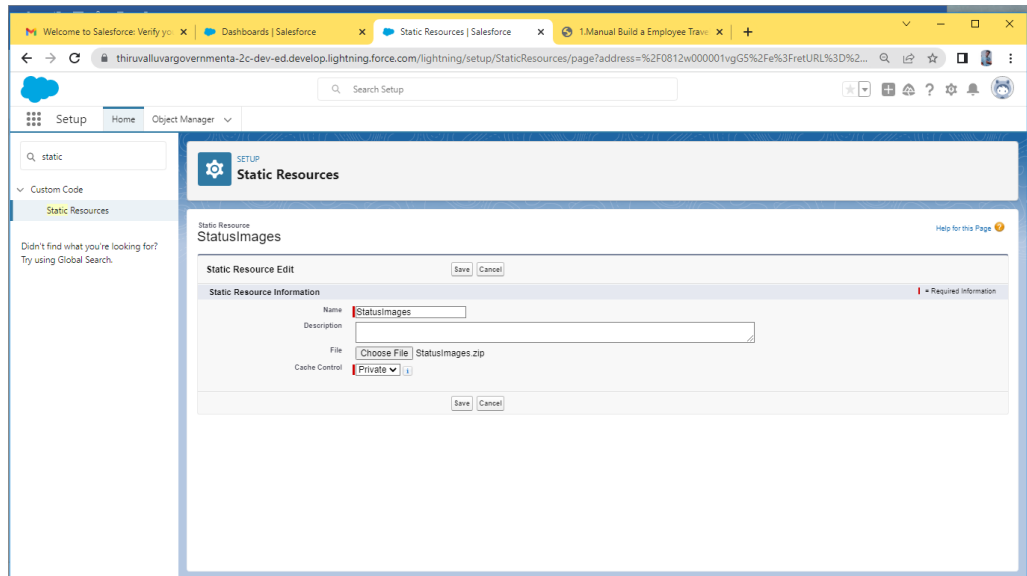
Activity-2:

Create Rollup Summary Fields



Activity-3:

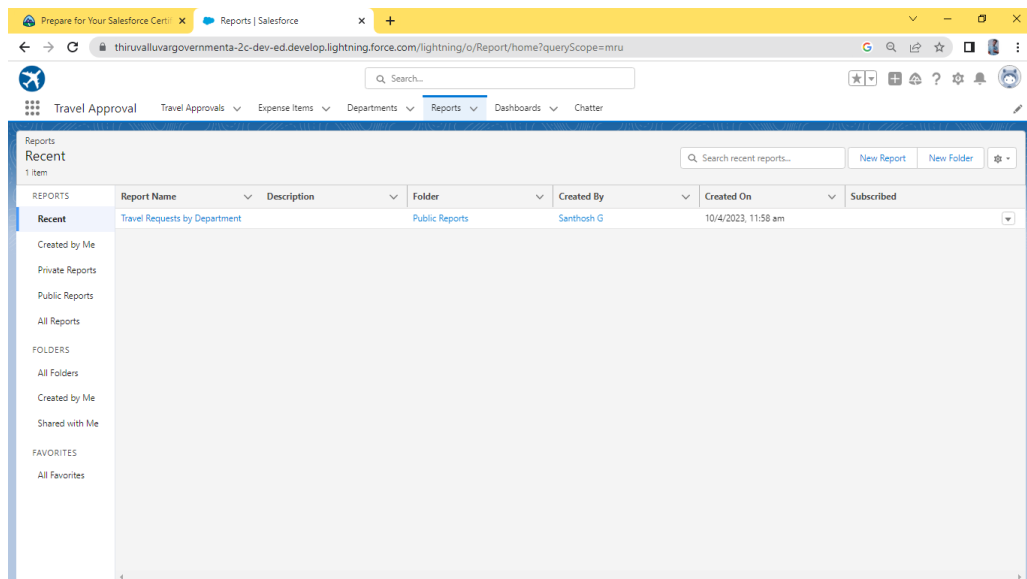
Create Formula Fields



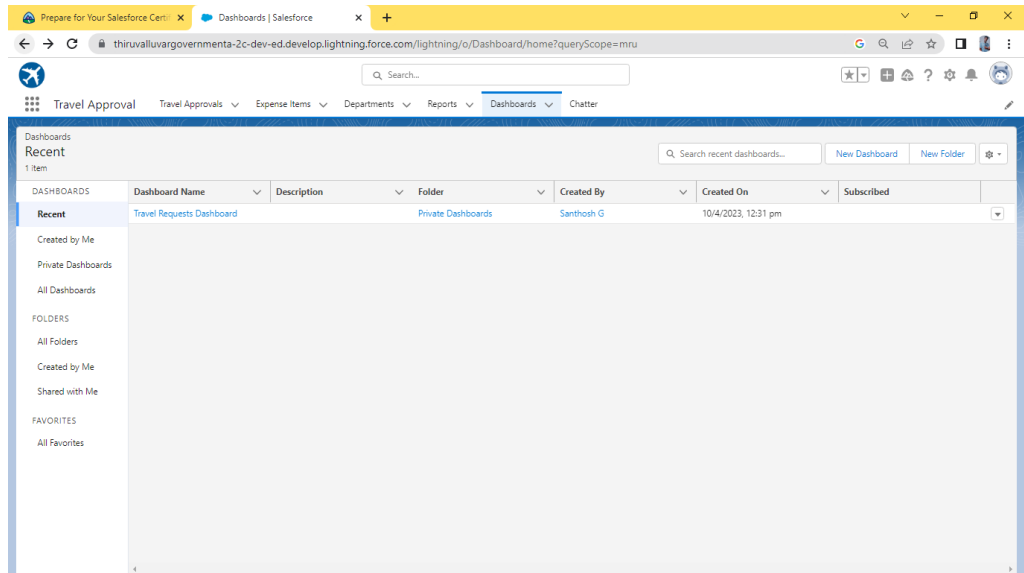
Milestone 10-What are Reports? :

Activity:

Add Report



Milestone 11- Dashboards:



4 Trailhead Profile Public URL

Team Leader	-	https://trailblazer.me/id/sphyem
Team Member 1	-	https://trailblazer.me/id/santo2125
Team Member 2	-	https://trailblazer.me/id/var10
Team Member 3	-	-

5 ADVANTAGES & DISADVANTAGES:

ADVANTAGES:

- **Streamlined Approval Process:** With a travel approval application, the travel approval application, the travel approval process can be

automated and streamlined. This can help to save time and reduces the administrative and employees.

- **Improved Cost Control:** A travel approval application can help to enforce company travel policies and ensure that employees are booking within the budget. This can help to control costs and prevent overspending on travel expenses.
- **Increased visibility and reporting:** A travel approval application can provide greater visibility into travel spending and enable better reporting and analysis. This can help managers to identify trends and make informed decisions about travel policies and budgets.

DISADVANTAGES:

One potential disadvantage of an employee travel approval application for corporates is that it may be time consuming and cumbersome for employees to use. If the application requires employees to input a lot of information or go through multiple steps to get approval for their travel, it may discourage them from using it and lead to lower compliance rates.

6 APPLICATIONS:

Salesforce offers a range of options for building a travel approval applications, for corporates, depending on the specific needs and requirement of the company. Here is an overview of the steps involved in building a travel approval application using salesforce:

- **Define requirements:** Start by defining the requirement for the travel approval application, including workflow, approval processes, reporting and analytics, and integration with other systems.
- **Design data model:** Design the data model for the application, including data objects and fields, relationships between objects, and security and sharing settings.
- **Build user interface:** Build the user interface for the application, including pages, layouts, and components, using the Lightning App Builder.
- **Implement reporting and analytics:** Implement reporting and analytics features to track travel expenses, identify trends, and make informed decisions about future travel requests.

7 **CONCLUSION:**

In Conclusion, a travel approval application in salesforce can offer many benefits for companies looking to streamline their travel request and approval processes. By automating workflows, ensuring compliance with policies and regulations, providing real-time visibility into expenses and budgets, and offering customizable workflows and reporting and analytics, a travel approval application can improve efficiency, reduce costs, and increase employee productivity and satisfaction.

Salesforce provides a range of tools and resources for building custom applications, and with the right expertise and support, companies can build a travel approval application tailored to their specific needs and requirements. Overall, a travel approval application in salesforce can be a valuable investment for companies looking to improve their travel request and approval processes and increase efficiency and compliance.

8 **FUTURE SCOPE:**

The future scope for a travel approval application for corporates in Salesforce is promising, with opportunities for innovation and improvement in several areas. Here are some potential areas for future development:

- **AI-powered automation:** The use of artificial intelligence (AI) and machine learning (ML) could enable even greater automation of travel approval workflows, reducing the need for manual intervention and increasing efficiency.
- **Mobile access:** Offering mobile access to the travel approval application would enable employees and managers to submit and approve travel requests from anywhere, at any time, improving flexibility and convenience.

- **Integration with virtual and augmented reality:** Integrating the application with virtual or augmented reality (VR/AR) technologies could provide a more immersive and interactive experience for travel booking and approval, potentially improving employee engagement and satisfaction.
- **Enhanced reporting and analytics:** Continued development of reporting and analytics features could enable even more detailed tracking of travel expenses and trends, providing deeper insights into travel costs and opportunities for optimization.