

PROJECT REPORT TEMPLATE

1. INTRODUCTION

1.1. OVERVIEW

The project is focused on creating a custom travel approval application in Salesforce, a popular customer relationship management (CRM) platform. The travel approval app aims to automate and streamline the travel approval process for a business, allowing employees to submit travel requests, which are routed for approval through appropriate channels. The app includes features such as custom objects and fields for data management, reporting and dashboards for data visualization and insights, and customization options to tailor the app to specific business requirements. The project involves creating custom objects, fields, reports, and dashboards in Salesforce, configuring approval processes, and developing a user-friendly interface for employees to submit and track travel requests. The goal of the

project is to optimize the travel approval process, improve data accuracy and accessibility, and enable informed decision-making for travel management.

1.2.PURPOSE

The purpose of the travel approval app project in Salesforce is to automate and streamline the travel approval process for a business, resulting in several benefits:

- Efficient travel approval process: The app allows employees to submit travel requests online, which are then routed through appropriate approval channels, eliminating the need for manual paperwork or email-based approvals. This streamlines the travel approval process, reducing delays and ensuring timely approvals.
- Improved data accuracy and accessibility: The app includes custom objects and fields for capturing travel request details, ensuring accurate and consistent data entry. The data is stored securely in Salesforce, making it easily accessible for reporting, analysis, and decision-making purposes.
- Enhanced reporting and data visualization: The app enables the creation of custom reports and dashboards, providing insights and visualizations of travel data. This helps

in monitoring travel expenses, analyzing travel patterns, and identifying areas for cost optimization.

- Customization to business requirements: The app can be customized to meet specific business requirements, such as incorporating unique approval workflows, adding custom fields, or modifying the user interface. This flexibility allows the app to be tailored to the unique needs of the business.
- Improved compliance and auditability: The app includes approval processes that ensure compliance with company policies and procedures. The automated and documented travel
- approval process provides transparency and auditability, enhancing compliance and risk management.

Overall, the travel approval app in Salesforce helps businesses optimize their travel approval process, improve data accuracy and accessibility, enable data-driven decision-making, and enhance compliance and auditability, resulting in increased efficiency and cost savings.

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.

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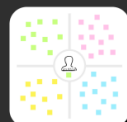
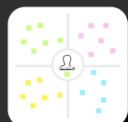
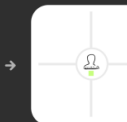
Need some inspiration?
See a finished version of this template to kickstart your work.

[Open example](#)




Build empathy

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



2.2.IDEATION & BRAINSTORMING MAP

Template



Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

🕒 10 minutes to prepare
👥 1 hour to collaborate
👤 2-8 people recommended

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Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

🕒 10 minutes

Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.

Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#) →

1

Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

🕒 5 minutes

Our company needs to establish a consistent process for approving employee travel requests to ensure that they align with our budget and business goals.

Key rules of brainstorming

To run a smooth and productive session

- Stay in topic.
- Encourage wild ideas.
- Defer judgment.
- Listen to others.
- Go for volume.
- If possible, be visual.

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

🕒 10 minutes

Hariharan

- Set a clear travel policy
- Standardize the approval process
- Create an online travel request
- Use technology to streamline the process

Dineshkumar

- Communicate the travel policy process clearly
- Analyze travel data
- Encourage cost-saving measures
- Establish a pre-approval process

Haris Pandey

- Consider a travel budget
- Create a centralized travel desk
- Offer training and support
- Review and update the travel policy regularly

Parthiban

- Consider alternative travel options
- Implement a tiered approval system
- Allow for exceptions
- Offer incentives for cost savings

Santhoshkumar

- Track and monitor travel expenses
- Provide clear feedback
- Evaluate travel vendors
- Ensure compliance with legal and regulatory requirements


TIP

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

Need some inspiration?

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

[Open example](#) →



3

Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you and break it up into smaller sub-groups.

20 minutes



4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

20 minutes



5

After you collaborate

You can export the mural as an image or pdf to share with members of your company who might find it helpful.

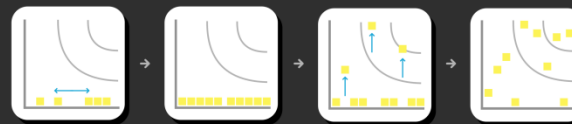
Quick add-ons

- Share the mural**
Share a view link to the mural with stakeholders to keep them in the loop about the outcomes of the session.
- Export the mural**
Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save in your drive.

Keep moving forward

- Strategy blueprint**
Define the components of a new idea or strategy.
[Open the template →](#)
- Customer experience journey map**
Understand customer needs, motivations, and obstacles for an experience.
[Open the template →](#)
- Strengths, weaknesses, opportunities & threats**
Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.
[Open the template →](#)

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3.RESULT

3.1.DATA MODEL:

<i>Object Name</i>	<i>Field in the Object</i>	
<i>1)Department</i>	<i>Field Label</i>	<i>Data Type</i>
	<i><u>Department</u></i> <i><u>code</u></i>	<i><u>Text(10)</u></i>
	<i><u>Departmnet</u></i> <i><u>Name</u></i>	<i><u>Text(80)</u></i>

2)Travel Approval

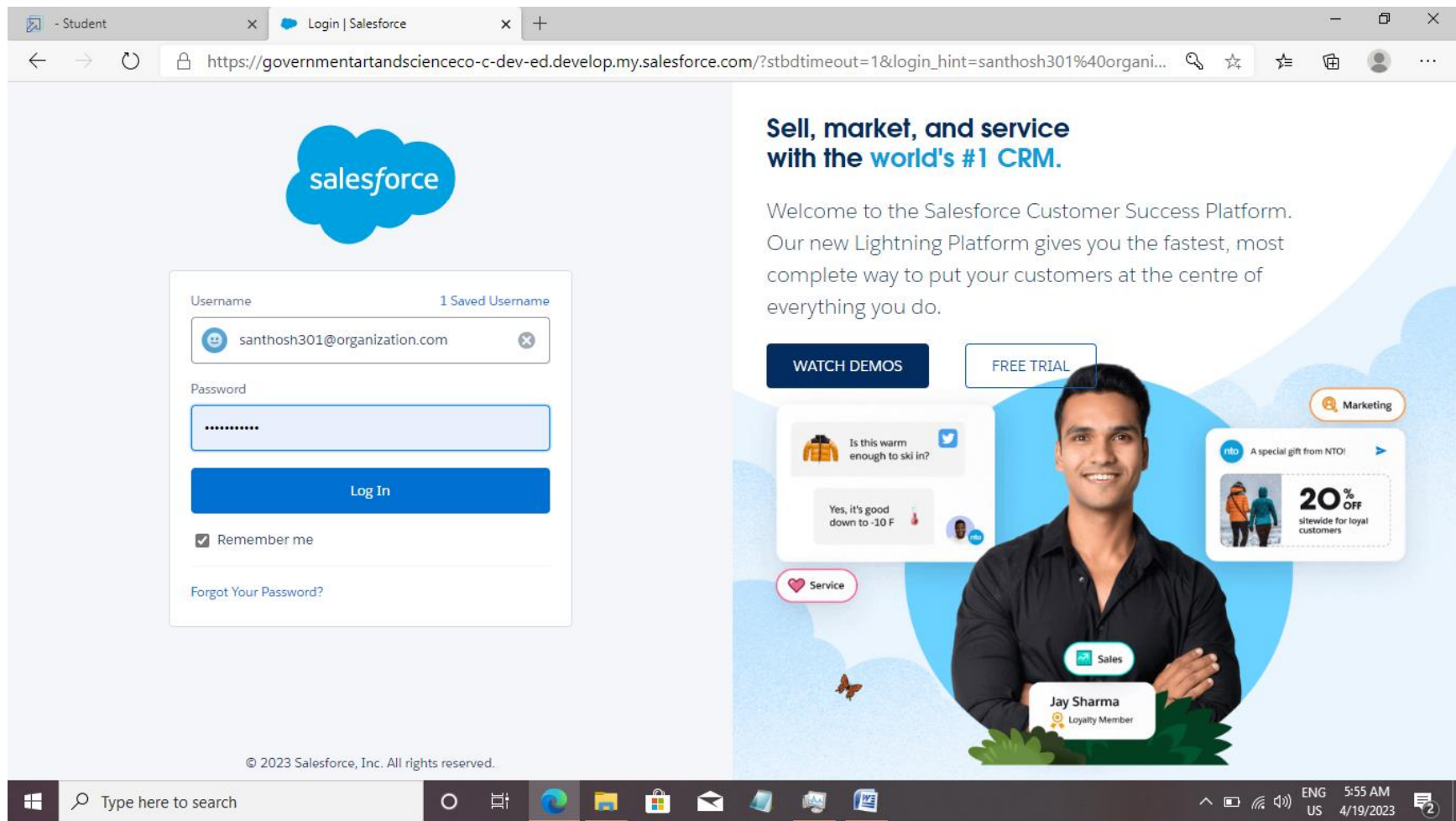
<i>Field Label</i>	<i>Data Type</i>
<i>1)Department</i>	<i>Lookup (Department)</i>
<i>2)Destination State</i>	<i>Text(2)</i>
<i>3)Out of State</i>	<i>Checkbox</i>
<i>4)Purpose of trip</i>	<i>Text(255)</i>
<i>5)Status</i>	<i>Picklist</i>
<i>6)Status Indicator</i>	<i>Formula</i>
<i>7)Total Expenses</i>	<i>Roll-Up Summary</i>
<i>8)Travel Approval #</i>	<i>Auto Number</i>
<i>9)Trip Start Date</i>	<i>Date</i>
<i>10)Trip End Date</i>	<i>Date</i>

3)Expense Items

<i>Field Label</i>	<i>Data Type</i>
<i>1)Amount</i>	<i>Currency(16,2)</i>
<i>2)Expense Item Number</i>	<i>Auto Number</i>
<i>3)Expense Type</i>	<i>Picklist</i>
<i>4)Travel Approval</i>	<i>Master-Detail (Travel Approval)</i>

3.2.Activity & Screenshot

1. Activity-1(Create Salesforce Account)



The screenshot shows a web browser window with the Salesforce login page. The browser's address bar displays the URL: `https://governmentartandscienceco-c-dev-ed.develop.my.salesforce.com/?stbtimeout=1&login_hint=santhosh301%40organi...`. The page features the Salesforce logo at the top left. Below it, there is a login form with fields for 'Username' (containing 'santhosh301@organization.com') and 'Password' (masked with dots). A 'Log In' button is positioned below the password field. A 'Remember me' checkbox is checked, and a link for 'Forgot Your Password?' is located at the bottom of the form. To the right of the login form, a large promotional banner for the Salesforce Customer Success Platform is displayed. The banner includes the text 'Sell, market, and service with the world's #1 CRM.' and 'Welcome to the Salesforce Customer Success Platform. Our new Lightning Platform gives you the fastest, most complete way to put your customers at the centre of everything you do.' Below this text are two buttons: 'WATCH DEMOS' and 'FREE TRIAL'. The banner also features a central image of a man, Jay Sharma, identified as a 'Loyalty Member'. Surrounding him are several floating cards: one for 'Marketing' with a '20% OFF' discount, one for 'Service' with a 'Yes, it's good down to -10 F' message, and one for 'Sales' with a 'A special gift from NTO!' message. The bottom of the browser window shows the Windows taskbar with various application icons and the system clock indicating 5:55 AM on 4/19/2023.

2. Activity-2(Account Activation)

The screenshot shows the Salesforce Setup Home page in a web browser. The browser's address bar displays the URL: `https://governmentartandscienceco-c-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home`. The page features a top navigation bar with a search bar labeled "Search Setup" and a "Create" button. Below this, a sidebar on the left contains a "Quick Find" search bar and a list of navigation items: "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", "Optimizer", "ADMINISTRATION" (with sub-items "Users", "Data", "Email"), and "PLATFORM TOOLS" (with sub-items "Subscription Management", "Apps").

The main content area is titled "SETUP Home" and includes a "Create" button. It displays three featured cards:

- Get Started with Einstein Bots**: Launch an AI-powered bot to automate your digital connections. Includes a "Get Started" button.
- Mobile Publisher**: Use the Mobile Publisher to create your own branded mobile app. Includes a "Learn More" button.
- Real-time Collaborative Docs**: Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce. Includes a "Get Started" button.

Below these cards, there is a section titled "Most Recently Used" showing "10 items". A table header is visible with columns for "NAME", "TYPE", and "OBJECT".

The Windows taskbar at the bottom shows the search bar "Type here to search", several application icons, and system status information including "ENG US", "5:56 AM", and "4/19/2023".

3. Activity-3(Create the Travel Application)

The screenshot displays the Salesforce Dashboards interface. The browser address bar shows the URL: `https://governmentartandscienceco-c-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru`. The Salesforce navigation bar includes the 'Travel Approval' app and a menu with 'Dashboards', 'Reports', 'Chatter', 'Departments', 'Travel Approvals', and 'Expense Items'. The main content area is titled 'Dashboards' and shows a 'Recent' section with 1 item. A table lists the dashboard details:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Travel Requests Dashboard		Private Dashboards	Santhoshkumar S	19/3/2023, 2:30 am	

The left sidebar contains navigation links for 'DASHBOARDS' (Recent, Created by Me, Private Dashboards, All Dashboards), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES' (All Favorites). The Windows taskbar at the bottom shows the search bar and system tray with the date and time: 5:56 AM, 4/19/2023.

Description:

The Travel Approval Lightning app is a user-friendly, visually appealing Salesforce application designed to streamline the travel approval process. It includes custom objects for managing travel requests, expenses, and departments, allowing for easy submission, review, and approval of travel requests. The app provides a seamless user experience with a modern and intuitive interface, making it convenient for employees to request travel, track expenses, and manage approvals in an efficient and organized manner.

4. Activity-4(Three Custom Object Creation)

Department Object:

The screenshot shows the Salesforce 'Department Object' setup page. The browser address bar displays the URL: <https://governmentartandscienceco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003QqAl/Deta...>. The page header includes a search bar labeled 'Search Setup' and navigation tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Department Object' and features a left-hand navigation menu with options like '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 currently selected, showing fields for 'Description', 'API Name' (Department__c), 'Custom' (checked), 'Singular Label' (Department), 'Plural Label' (Departments), 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (Deployed), 'Help Settings', and 'Standard salesforce.com Help Window'. The 'Edit' and 'Delete' buttons are visible in the top right corner of the details section. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

Description:

Department: The Department custom object is used to define different departments within the organization. It may include information such as department name, manager, and budget allocation. This custom object allows for easy categorization and tracking of travel requests and expenses by department, ensuring accurate reporting and budget management.

Travel Approval Object:

The screenshot shows the Salesforce Setup interface for the 'Travel Approval' object. The browser address bar displays the URL: `https://governmentartandscienceco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003QqAv/Deta...`. The page title is 'Travel Approval'. The left sidebar contains a navigation menu with the following items: 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 currently selected. The main content area displays the following information:

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	

The bottom of the screen shows the Windows taskbar with the search bar and system tray.

Description:

Travel Approval: The Travel Approval custom object is used to capture and track travel requests submitted by employees. It may include information such as travel dates, destination, purpose, and estimated expenses. This custom object allows for efficient submission, review, and approval of travel requests, ensuring compliance with organizational policies and budget constraints.

Expense Item Object:

The screenshot shows the Salesforce Object Manager interface for the 'Expense Item' object. The browser address bar indicates the URL: <https://governmentartandscienceco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003QqBA/Det...>. The Salesforce navigation bar includes 'Setup', 'Home', and 'Object Manager'. The breadcrumb trail is 'SETUP > OBJECT MANAGER' followed by 'Expense Item', which is circled in purple. The main heading is 'Expense Items'. The left 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, Restriction Rules, and Scoping Rules. The 'Details' section is active, showing fields like Description, API Name (Expense_Item__c), Custom (checked), Singular Label (Expense Item), Plural Label (Expense Items), and a list of settings: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window. 'Edit' and 'Delete' buttons are in the top right of the details section. The Windows taskbar at the bottom shows the search bar and system tray with the date 4/10/2023.

Expense Item | Salesforce

https://governmentartandscienceco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003QqBA/Det...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Expense Item

Expense Items

Edit Delete

Details

Description

API Name
Expense_Item__c

Custom
✓

Singular Label
Expense Item

Plural Label
Expense Items

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Type here to search

ENG US 11:40 PM 4/10/2023

Description:

Expense Items: The Expense Items custom object is used to capture and track individual expenses associated with a travel request. It may include information such as expense category, description, amount, and receipt attachment. This custom object allows for easy recording and tracking of expenses incurred during travel, ensuring timely reimbursement and accurate expense reporting.

By creating these custom objects in Salesforce, the Travel Approval app can provide a comprehensive solution for managing travel requests, expenses, and approvals, helping organizations streamline their travel approval process and ensure efficient travel management across departments.

• Activity-5(Create Custom Tabs For Objects)

The screenshot displays the Salesforce 'Custom Tabs' configuration page. The left sidebar contains navigation links like Home, Chatter, Libraries, Content, Subscriptions, Departments, Travel Approvals, and Expense Items. The main content area is titled 'Custom Tabs' and provides an overview of how to create custom tabs. Below the overview, there are four sections for different tab types: Custom Object Tabs, Web Tabs, Visualforce Tabs, and Lightning Component Tabs. The 'Custom Object Tabs' section is highlighted with a red box and contains a table with the following data:

Action	Label	Tab Style	Description
Edit Del	Departments	Books	
Edit Del	Expense Items	Credit card	
Edit Del	Travel Approvals	Airplane	

The other sections (Web Tabs, Visualforce Tabs, and Lightning Component Tabs) currently show 'No [Tab Type] Tabs have been defined'.

Description:

- Creating tabs for the Travel Approval app in Salesforce is a simple and effective way to provide users with easy access to different functionalities of the app. Tabs are visual elements that allow users to navigate between different objects or components within an app. For the Travel Approval app, tabs can be created for different custom objects such as Travel Requests, Expenses, and Departments, as well as for standard objects like Contacts or Accounts, depending on the specific needs of the app. These tabs can be customized to display relevant information and actions for each object or component. Tabs can be added to the app's navigation bar, providing users with quick access to important features and data. They can be customized with different icons, labels, and colors to visually differentiate between different tabs and make the app more user-friendly. By creating tabs for the Travel Approval app, users can easily navigate between different functionalities, view and manage travel requests, expenses, and departments in a convenient and organized manner, improving the overall user experience and productivity within the app.

1. Activity-6(Create Field & Relationships)

Department Field & Relationship:

Department | Salesforce

https://governmentartandscienceco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003QqAl/Field...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Department

Department Fields

Fields & Relationships
5 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 Code	Department_Code__c	Text(10) (Unique Case Sensitive)		✓
Department Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Type here to search

ENG 11:40 PM US 4/10/2023

Description:

- To create field relationships for the Department object, we need to identify the relationship between fields in different objects. In this case, we can create a lookup relationship between the Department object and any other object that needs to reference the department.
- For example, if we have an Employee object, we can create a lookup field in the Employee object that references the Department object. This allows us to link employee records with their corresponding department record.
- The Department object itself can have fields like Dep Code and Dep Name, which can be used to uniquely identify and describe each department. By creating these fields as required fields, we can ensure that every department record has a code and name associated with it.

Travel Approval Field & Relationships:

Travel Approval | Salesforce

https://governmentartandscienceco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003QqAw/Field...

Setup Home Object Manager

SETUP > OBJECT MANAGER
Travel Approval

Travel Approval Fields

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		

Travel Approval | Salesforce

https://governmentartandscienceco-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003QqAw/Field...

Setup Home Object Manager

SETUP > OBJECT MANAGER
Travel Approval

Travel Approval Fields

Fields & Relationships
13 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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		

Description:

- To create field relationships for the Travel Approval object, we can establish relationships with other objects in Salesforce. Field relationships allow us to link records in different objects together, which can be useful for creating dependencies and capturing related information.
- For example, we can create a lookup relationship between the Travel Approval object and the Employee object. This allows us to associate travel approval records with the employee who submitted the request. We can also create fields in the Travel Approval object that reference fields in other objects, such as the Department object or the Expense Items object, to capture additional information related to the travel approval.
- By establishing field relationships, we can create a more comprehensive and interconnected data model within our Travel Approval app, allowing for better tracking and management of travel requests and associated information.

Expense Items Field & Relationships:

The screenshot shows the Salesforce Object Manager interface for the 'Expense Item' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and others. The main area is titled 'Expense Items Fields' and displays a table of fields and their relationships. Two purple boxes highlight specific columns: 'FIELD LABEL' and 'DATA TYPE'.

Expense Item

Expense Items Fields

Fields & Relationships
6 Items, Sorted by Field Label

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)		✓

Windows taskbar at the bottom shows the search bar, task icons, and system tray with date/time: 11:40 PM, 4/10/2023.

• Acitivity-7(Import Departments)

This screenshot shows the Salesforce 'Departments' list view. The interface includes a top navigation bar with tabs for 'Travel Approval', 'Dashboards', 'Reports', 'Chatter', 'Departments', 'Travel Approvals', and 'Expense Items'. The 'Departments' tab is active. Below the navigation bar, there's a search bar and a list of 16 departments. The list is sorted by 'Department Name' and filtered by 'All departments'. The departments listed are:

- 1 ☐ Audit Services
- 2 ☐ Contract Management
- 3 ☐ Disability Determination Bureau
- 4 ☐ Division of Aging
- 5 ☐ Division of Disability and Rehabilitative Services
- 6 ☐ Division of Family Resources
- 7 ☐ Division of Finance
- 8 ☐ Division of Mental Health and Addiction
- 9 ☐ Human Resources
- 10 ☐ Legislative Services
- 11 ☐ Office of Communications and Media
- 12 ☐ Office of Early Childhood and Out-of-School Learning
- 13 ☐ Office of General Counsel
- 14 ☐ Office of Medicaid Policy and Planning

The bottom of the screen shows a Windows taskbar with the search bar and system tray.

This screenshot shows the same Salesforce 'Departments' list view, but with a different selection of departments. The list is sorted by 'Department Name' and filtered by 'All departments'. The departments listed are:

- 3 ☐ Disability Determination Bureau
- 4 ☐ Division of Aging
- 5 ☐ Division of Disability and Rehabilitative Services
- 6 ☐ Division of Family Resources
- 7 ☐ Division of Finance
- 8 ☐ Division of Mental Health and Addiction
- 9 ☐ Human Resources
- 10 ☐ Legislative Services
- 11 ☐ Office of Communications and Media
- 12 ☐ Office of Early Childhood and Out-of-School Learning
- 13 ☐ Office of General Counsel
- 14 ☐ Office of Medicaid Policy and Planning
- 15 ☐ Quality and Compliance Office
- 16 ☐ Technology

The bottom of the screen shows a Windows taskbar with the search bar and system tray.

Description:

- Importing data into the Department object in Salesforce allows you to quickly and efficiently populate the object with records from an external data source. This can be done using Salesforce's data import tools, such as the Data Import Wizard or through a third-party data integration tool.
- To import data into the Department object, you need to prepare your data in a compatible format, such as a CSV (Comma Separated Values) file, Excel spreadsheet, or other supported file types. You can then use the Data Import Wizard or another data integration tool to map the fields in your data source to the corresponding fields in the Department object.
- During the import process, you can specify how to handle duplicates, such as by updating existing records or skipping duplicate records. You can also set validation rules to ensure data integrity and accuracy during the import process.
- Importing data into the Department object allows you to quickly populate the object with relevant information, such as department codes, department names, and other relevant data, enabling you to efficiently manage and track departments within your Salesforce org.

• Activity-8(Create User And Setup Approvals)

The screenshot displays the Salesforce 'All Users' page. The page title is 'All Users' and it includes a search bar and a 'Switch to Lightning Experience' button. The main content area shows a list of users with the following columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d2w00000rox2wear.ubgg6upbafao@chatter.salesforce.com		✓	Chatter Free User
Edit	Executive_Eric	eexec	santhosh3093@gmail.com	CEO	✓	System Administrator
Edit	Gelli_Ganesh	ggell	jamsanthosh030@organization.com	HR Manager		Standard Platform User
Edit	Manager_HR	hmana	jamsanthosh03@organization.com	HR Manager		Standard Platform User
Edit	S_Santhoshkumar	SS	santhosh301@organization.com		✓	System Administrator
Edit	User_Integration	integ	integration@00d2w00000rox2wear.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d2w00000rox2wear.com		✓	Analytics Cloud Security User

The page also includes a sidebar with navigation links and a top navigation bar. The sidebar contains links for 'Home', 'Chatter', 'Libraries', 'Content', 'Subscriptions', 'Departments', 'Travel Approvals', 'Expense Items', and 'Salesforce Mobile Quick Start'. The top navigation bar includes a search bar, a 'Switch to Lightning Experience' button, and a 'Content' dropdown menu.

Description:

- Creating users for the Travel Approval app in Salesforce involves setting up user accounts and profiles that have the appropriate permissions and access levels to use and interact with the app.
- First, you need to create user accounts for each individual who will be using the Travel Approval app. User accounts typically include information such as the user's name, email address, username, and password. You can create user accounts manually or by importing user data from an external source.
- Next, you can assign profiles to the user accounts. Profiles define the permissions and access levels that a user has within Salesforce, including access to objects, fields, and other features. You can create custom profiles or use existing profiles that align with the roles and responsibilities of the users in the Travel Approval app.
- When creating users for the Travel Approval app, it's important to consider the specific permissions and access levels that each user needs to perform their job functions effectively. For example, travel request approvers may need higher access levels to review and approve travel requests, while regular users may only need read-only access to view their own travel requests.
- By creating users with the appropriate profiles and permissions, you can ensure that each user in the Travel Approval app has the necessary access and functionality to perform their tasks efficiently and effectively, while also maintaining data security and integrity within your Salesforce org.

Activity-9(Customize Travel Approval Object Page layout)

The screenshot shows the Salesforce Page Layout Editor for the Travel Approval object. The interface includes a sidebar with navigation options and a main area displaying the page layout. A purple box highlights the Information and Trip Info sections.

Information (Header visible on edit only)

Travel Approval #	GEN-2004-001234	Owner	Sample Text
Status	Sample Text	Department	Sample Text
Total Expenses	₹123.45		
Status Indicator	Sample Text		

Trip Info

Purpose of Trip	Sample Text	Out of State	<input checked="" type="checkbox"/>
Trip Start Date	11/04/2023	Destination State	Sample Text
Trip End Date	11/04/2023		

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-------------	------------------	-------------

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Description:

- Customizing the page layout for the Travel Approval object in Salesforce allows you to tailor the appearance and functionality of the Travel Approval record pages to suit the specific needs and workflows of your organization.
- With page layout customization, you can control which fields, related lists, and buttons are displayed on the Travel Approval record pages. You can rearrange the order of fields and related lists, determine field properties such as visibility, read-only, or required, and customize the buttons that appear on the record page. This allows you to create a personalized view of the Travel Approval record that is optimized for the needs of your users and processes.
- For example, you can customize the page layout to display relevant fields such as travel destination, travel dates, and purpose of travel prominently on the page, while hiding less relevant fields. You can also include related lists such as travel expenses and approval history to provide a comprehensive view of the Travel Approval record. Additionally, you can customize buttons such as "Submit for Approval" or "Cancel Travel Request" to streamline the approval process and align with your organization's workflows.
- By customizing the page layout for the Travel Approval object, you can create a user-friendly and efficient interface for managing travel requests, ensuring that users have easy access to the information and functionality they need to effectively manage and track travel approvals within your Salesforce org.

Activity-10(Create Validation Rule)

The screenshot shows the Salesforce interface for configuring a Validation Rule. The browser tabs include 'Student', 'Salesforce Travel Approval.', 'NM_Arts_Project_Report_Sales', 'Travel Approval | Salesforce', and 'Travel Approval Validation Rule'. The URL is <https://governmentartandscienceco-c-dev-ed.develop.my.salesforce.com/03d2w000000VuusAAC?appLayout=setup&noS1Redirect...>. The page title is 'Travel Approval Validation Rule' with a 'Back to Travel Approval' link. The 'Validation Rule Detail' section shows the rule is active and configured with the following details:

Validation Rule Detail			
Rule Name	Trip_end_date_after_start_date	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Trip_End_Date__c < Trip_Start_Date__c		
Error Message	Trip end date must be greater than or equal to start date	Error Location	Trip End Date
Description			
Created By	Santhoshkumar S, 19/03/2023, 1:50 am	Modified By	Santhoshkumar S, 19/03/2023, 1:50 am

The left sidebar contains navigation links for Home, Chatter, Libraries, Content, Subscriptions, Departments, Travel Approvals, and Expense Items. Below these are sections for 'Lightning Experience Transition Assistant' and 'Salesforce Mobile Quick Start'. The 'Administer' section lists various system management tasks like Release Updates, Manage Users, Manage Apps, Manage Territories, Company Profile, Data Classification, Privacy Center, and Security Controls. The bottom of the screen shows the Windows taskbar with the search bar and system tray.

Description:

Creating a validation rule for the Travel Approval object in Salesforce allows you to define and enforce data validation criteria to ensure that only valid and accurate data is entered into the object.

To create a validation rule for the Travel Approval object, you can follow these steps:

- Navigate to the Setup menu in Salesforce.
- In the left-hand sidebar, under "Platform Tools," click on "Object Manager."
- In the Object Manager, locate and click on the "Travel Approval" object.
- In the "Object" page, click on "Validation Rules" in the left-hand sidebar.
- Click on the "New" button to create a new validation rule.
- Provide a name and description for the validation rule to help identify its purpose.
- In the "Error Condition Formula" section, define the validation rule using a formula that specifies the criteria for valid data. For example, you can use formula functions, operators, and fields to create a formula that validates the values entered in specific fields, checks for required fields, or validates the format of data.
- In the "Error Message" section, provide a custom error message that will be displayed to users when the validation rule is triggered.
- Choose the appropriate "Error Location" option, which determines where the error message will be displayed (e.g., field level or record level).
- Click on the "Save" button to create the validation rule.

Once the validation rule is created, it will be applied to all new and updated records in the Travel Approval object, and any data that does not meet the validation criteria will trigger the error message defined in the validation rule. This helps to ensure that only valid and accurate data is entered into the Travel Approval object, maintaining data integrity and consistency in your Salesforce org.

Activity-11(Reports)

Report: Travel Approvals
Travel Request by Month

Total Records: 72

Trip End Date	Out of State	Travel Approval: Travel Approval #	Department	Status	Destination State	Trip Start Date
January 2019 (4)	(3)	TA-00013	Division of Family Resources	Approved	TX	04/01/2019
		TA-00039	Division of Finance	Approved	TX	10/01/2019
		TA-00072	Office of General Counsel	Approved	TX	04/01/2019
		Subtotal				
	(1)	TA-00002	Disability Determination Bureau	Approved	OK	10/01/2019
		Subtotal				
February 2019 (1)	(1)	TA-00062	Division of Family Resources	Approved	FL	12/02/2019
		Subtotal				
March 2019 (4)	(2)	TA-00017	Legislative Services	Approved	TX	06/03/2019
		TA-00063	Office of Medicaid Policy and Planning	Rejected	TX	10/03/2019
		Subtotal				
		Grand Total				

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

Report: Travel Approvals
Travel Request by Department

Total Records: 72
Total Out of State: 54

Department	Travel Approval: Travel Approval #	Status	Out of State	Destination State	Trip Start Date	Trip End Date
Audit Services (5)	TA-00024	Approved	<input checked="" type="checkbox"/>	OK	09/03/2019	09/03/2019
	TA-00032	Approved	<input checked="" type="checkbox"/>	OK	07/06/2019	07/06/2019
	TA-00040	Approved	<input checked="" type="checkbox"/>	FL	08/07/2019	08/07/2019
	TA-00044	Approved	<input checked="" type="checkbox"/>	OK	11/04/2019	11/07/2019
	TA-00049	Approved	<input checked="" type="checkbox"/>	OK	07/06/2019	07/06/2019
	Subtotal		5			
Contract Management (3)	TA-00009	Approved	<input checked="" type="checkbox"/>	OK	05/11/2019	05/11/2019
	TA-00034	Approved	<input checked="" type="checkbox"/>	GA	02/09/2019	02/09/2019
	TA-00066	Approved	<input type="checkbox"/>	TX	07/04/2019	07/04/2019
	TA-00067	Approved	<input checked="" type="checkbox"/>	CA	07/05/2019	07/06/2019
	TA-00070	Approved	<input type="checkbox"/>	TX	04/04/2019	04/04/2019
	Subtotal		3			
	Grand Total					

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

Description:

Creating reports for the Travel Approval app in Salesforce allows you to gain insights and analyze data related to travel requests, approvals, expenses, and other relevant metrics. Reports provide visual representations of data that can help you make informed decisions and track the performance of your travel approval process.

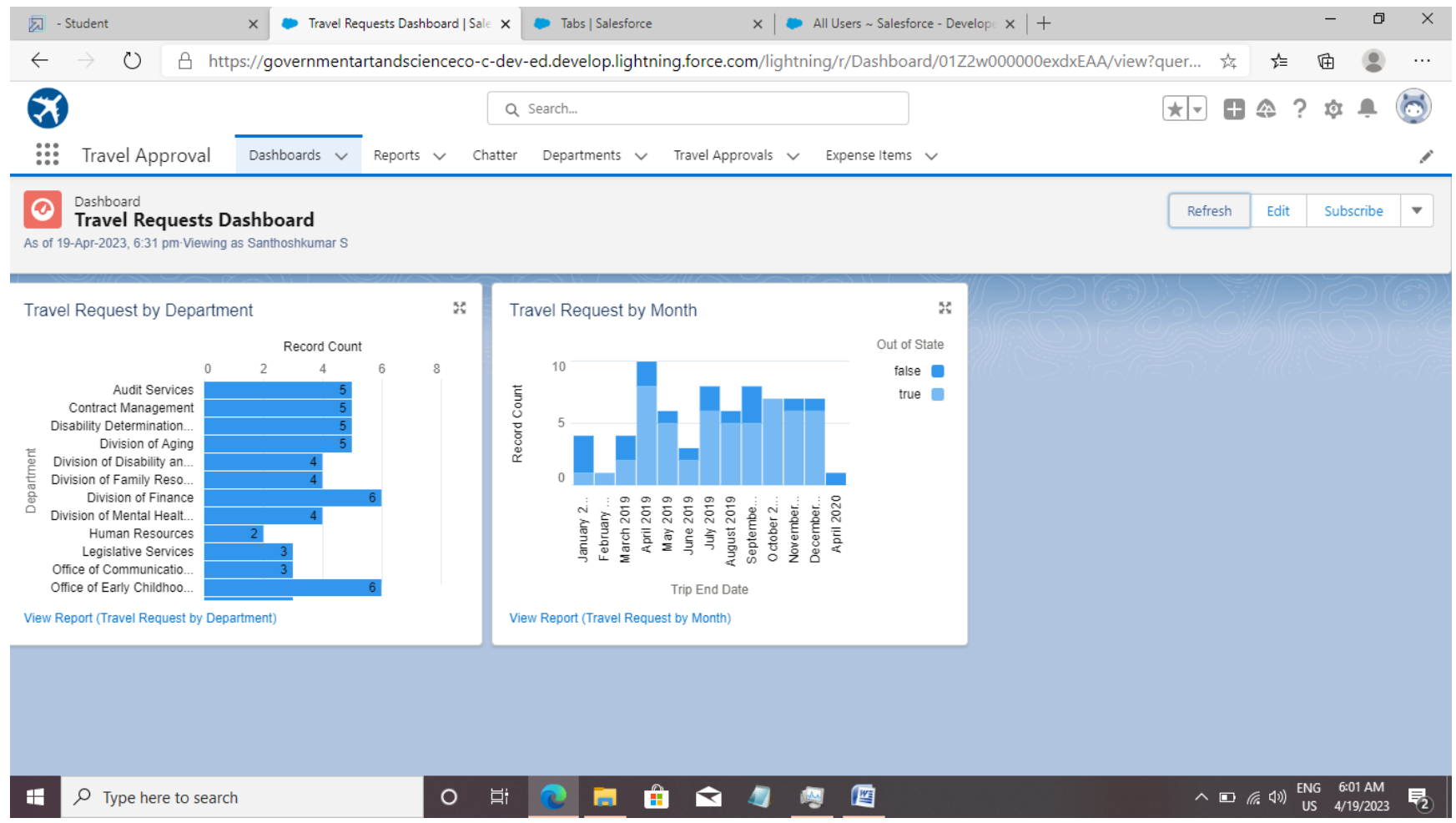
To create reports for the Travel Approval app, you can follow these steps:

- Navigate to the Reports tab in Salesforce.
- Click on the "New Report" button to create a new report.
- Choose the appropriate report type that aligns with the data you want to analyze. For example, you can select "Travel Request" or "Expense Item" as the report type to create reports based on those objects.
- Click on the "Create" button to start building your report.
- In the report builder, you can customize the report layout, add or remove columns, apply filters, and group data as needed. You can also choose from various report formats, such as tabular, summary, matrix, or chart.
- Drag and drop fields from the report type into the report builder to add them to your report. You can also apply aggregate functions, such as sum, average, or count, to calculate and display summary data.
- Apply filters to refine your report data based on specific criteria, such as date range, status, or owner.
- Customize the report appearance by adding report headers, footers, and titles, as well as choosing different chart types, colors, and styles.
- Click on the "Save" button to save your report and make it accessible to other users.

Once your report is created, you can run and view it to see the data in the report format you've chosen. You can also schedule reports to be emailed to specific users or groups at regular intervals, and share reports with other users or make them available in Salesforce dashboards for real-time monitoring. Reports provide valuable insights into your Travel Approval app data, helping you make data-driven decisions and optimize your travel approval process.

Activity-12(Dashboards)

Create The Travel Approval DashBoards:



Description:

Creating dashboards for the travel approval app in Salesforce is an essential step towards visualizing and analyzing the data generated by the travel approval process. Dashboards allow users to curate data from reports using charts, tables, and metrics, providing a comprehensive overview of travel-related information in a visually appealing and easily understandable format.

To create dashboards for the travel approval app, users can follow these steps:

- Navigate to the Dashboards tab within the Salesforce platform.
- Click on the "New Dashboard" button to create a new dashboard.
- Give the dashboard a name that reflects its purpose or content, such as "Travel Approvals Dashboard."
- Click on the "+Component" button to add components to the dashboard. Users can select the reports they have created in the travel approval app to populate the dashboard with relevant data.
- Choose the desired data visualization type, such as charts, tables, or metrics, based on the information that needs to be presented. Users can customize the appearance, size, and layout of the components to suit their preferences.
- Users can also apply filters to the dashboard components, allowing for different data perspectives to be applied to a single dashboard. Filters can be based on various criteria, such as travel dates, approval status, destination, or employee.
- Save the dashboard to make it accessible to other users in the Salesforce org.

Once the dashboard is created, it can be shared with relevant stakeholders, such as travel managers, finance teams, or executives, to provide them with real-time insights into the travel approval process. Dashboards can help identify trends, patterns, and anomalies in travel data, track key metrics, and make data-driven decisions to optimize the travel approval process, monitor compliance, and control costs.

4.Trailhead Profile Public URL

Team Lead -<https://trailblazer.me/id/sants60>

Team Member 1 -<https://trailblazer.me/id/dkumar2124>

Team Member 2 -<https://trailblazer.me/id/parts19>

Team Member 3 -<https://trailblazer.me/id/harig87>

Team Member 4 -<https://trailblazer.me/id/hpandy21>

5.Advantages & Disadvantages

Advantages of the travel approval app in Salesforce:

- Streamlined Travel Approval Process: The travel approval app in Salesforce automates and streamlines the travel approval process, ensuring that all travel requests are routed through the appropriate channels for approval, reducing manual effort and potential errors.
- Centralized Data Management: With custom objects and fields in Salesforce, the travel approval app allows for centralized data management, making it easy to track and manage travel requests, approvals, and expenses in one place, improving data accuracy and accessibility.
- Customization and Scalability: Salesforce provides extensive customization options, allowing the travel approval app to be tailored to specific business requirements. Additionally, Salesforce is a scalable platform that can handle increasing volumes of data and users as the business grows.
- Reporting and Dashboards: The travel approval app in Salesforce allows for creating reports and dashboards to visualize data and gain insights into travel patterns, expenses, and approvals, helping businesses make informed decisions and optimize their travel management process.

Disadvantages of the travel approval app in Salesforce:

- **Cost:** Salesforce is a paid platform, and implementing a custom travel approval app may involve additional costs, such as licensing fees, customization fees, and maintenance fees, which may not be feasible for small businesses with limited budgets.
- **Complexity:** Salesforce is a complex platform with a steep learning curve, requiring expertise in Salesforce configuration, customization, and administration. Developing and maintaining a custom travel approval app may require skilled resources or external consultants, adding to the overall complexity.
- **User Adoption:** Like any new software application, user adoption may be a challenge. Employees may require training and support to learn how to use the travel approval app effectively, and resistance to change may impact the success of the implementation.
- **Dependence on Salesforce Platform:** The travel approval app is built on the Salesforce platform, and any limitations or changes in Salesforce may affect the functionality and performance of the app. Businesses may need to stay updated with Salesforce releases and ensure compatibility with the app.
- **Overall,** the advantages of the travel approval app in Salesforce outweigh the disadvantages, but careful consideration of the specific business requirements, budget, and resources is necessary before implementing the app.

6)APPLICATIONS:

The travel approval app in Salesforce can be applied across various industries and organizations where travel approvals are required. Some of the areas where this solution can be applied include:

- **Corporate organizations:** Large corporations with multiple departments and employees frequently traveling for business purposes can benefit from the travel approval app. It helps in streamlining the travel approval process, ensuring compliance with company policies, and providing insights into travel expenses.
- **Small and medium-sized enterprises (SMEs):** SMEs with limited resources can utilize the travel approval app to automate their travel approval process, reduce paperwork, and improve data accuracy. It can also help in monitoring and optimizing travel expenses, which can be critical for cost-conscious SMEs.
- **Non-profit organizations:** Non-profit organizations often have employees or volunteers traveling for various purposes, such as fundraising events, conferences, or fieldwork. The travel approval app can help in managing travel approvals, ensuring compliance, and tracking expenses for accountability and transparency.

- Educational institutions: Educational institutions, such as universities and research organizations, may have faculty, staff, or students traveling for conferences, workshops, or research projects. The travel approval app can streamline the travel approval process, capture travel-related data, and facilitate reporting for budgeting and reimbursement purposes.
- Healthcare organizations: Healthcare organizations, such as hospitals or medical research institutions, may have staff traveling for conferences, training, or research purposes. The travel approval app can help in managing travel approvals, tracking expenses, and ensuring compliance with organizational policies and regulations.
- In summary, the travel approval app in Salesforce can be applied across various industries and organizations where travel approvals are required, helping in streamlining processes, improving data accuracy, enabling data-driven decision-making, and enhancing compliance and auditability.

7)CONCLUSION

In conclusion, the travel approval app in Salesforce is a comprehensive solution that enables organizations to automate and streamline their travel approval process. Through this app, users can create travel requests, submit them for approval, track expenses, and generate reports for better visibility and decision-making. The app offers several benefits, including improved efficiency, reduced paperwork, enhanced compliance, and better expense management. It can be applied across various industries and organizations, including corporate, SMEs, non-profit, educational, and healthcare sectors. Overall, the travel approval app in Salesforce is a valuable tool for organizations seeking to optimize their travel approval process and manage travel-related expenses effectively.

8)FUTURE SCOPE:

The travel approval app in Salesforce has potential for future enhancements and improvements. Some possible areas for future scope and enhancements could include:

- **Mobile App:** Developing a mobile application for the travel approval app would allow users to create and manage travel requests on-the-go, increasing flexibility and convenience.
- **Integration with Travel Booking Platforms:** Integrating the travel approval app with popular travel booking platforms, such as Expedia or Booking.com, could streamline the process of booking flights, hotels, and other travel-related services directly from the app.
- **Advanced Reporting and Analytics:** Enhancing the reporting and analytics capabilities of the app by incorporating advanced features such as predictive analytics, data visualization, and custom dashboards could provide deeper insights into travel data and facilitate better decision-making.
- **Machine Learning and AI-based Approvals:** Implementing machine learning and AI-based algorithms to automate the travel approval process, by analyzing travel history, expense patterns, and other relevant data, could expedite the approval process and reduce manual intervention.
- **Enhanced Security Features:** Strengthening the security features of the app to ensure data privacy, compliance with regulations such as GDPR, and protection against cyber threats, could enhance the overall security posture of the travel approval process.
- **User Experience (UX) Enhancements:** Continuously improving the user experience of the app by incorporating user feedback, conducting usability studies, and implementing user-centric

design principles could lead to a more intuitive and user-friendly interface, resulting in higher user adoption and satisfaction.

- Customization and Configuration: Allowing for greater customization and configuration options within the app to meet specific organizational requirements, such as adding custom fields, workflows, and approval processes, would enhance the app's flexibility and adaptability.
- Integration with Expense Management Tools: Integrating the travel approval app with popular expense management tools, such as Concur or Expensify, could automate the process of capturing and reconciling travel expenses, reducing manual effort and improving accuracy.

These are some potential areas for future scope and enhancements in the travel approval app in Salesforce, which could further optimize and streamline the travel approval process, enhance user experience, and provide more advanced reporting and analytics capabilities.