

BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

1. INTRODUCTION:

1.1 Overview:

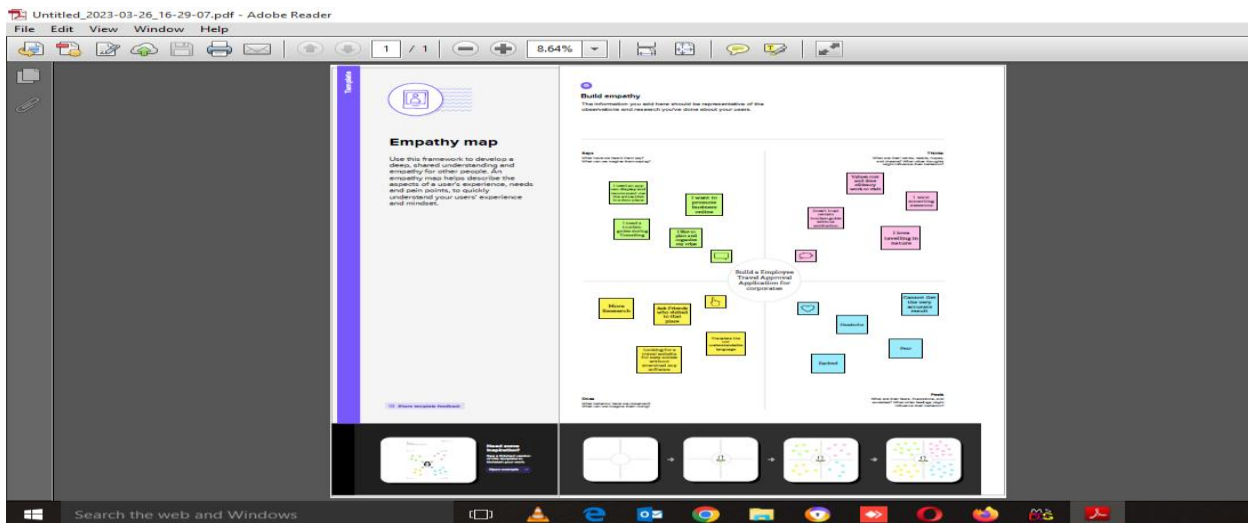
Corporate travel is an integral part of the business world, as companies need to travel to meet clients, attend conferences and meetings, and explore new markets. However, managing employee travel can be a cumbersome task for the HR and travel departments. That's why many corporates have started using employee travel approval applications to streamline the process.

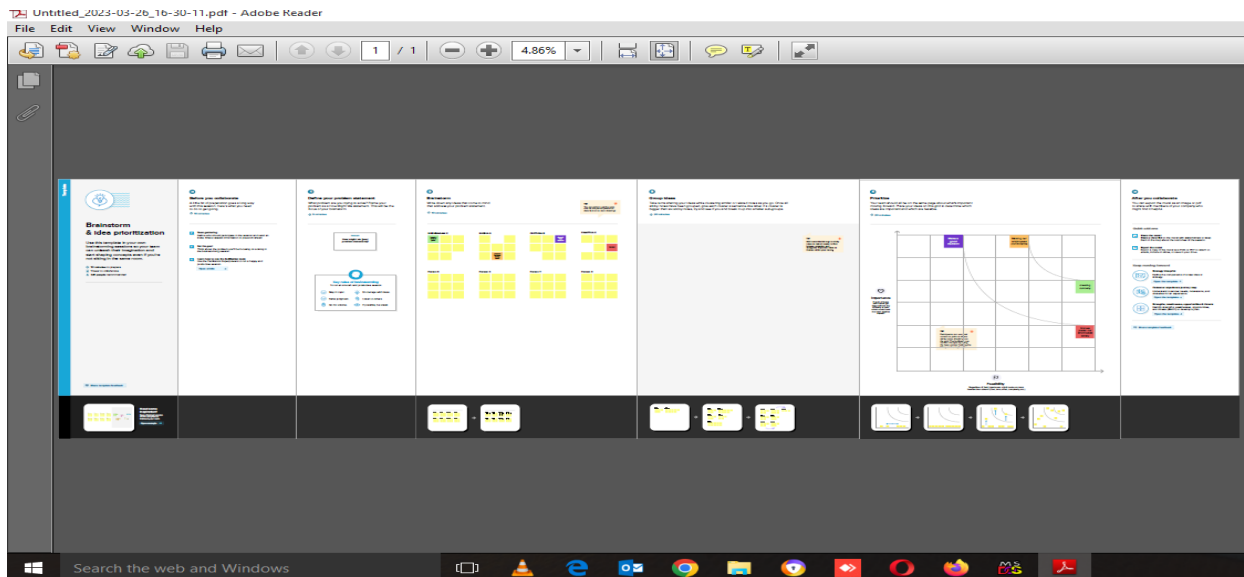
1.2 Purpose:

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

2. Problem Definition & Design Thinking:

2.1 Empathy map:



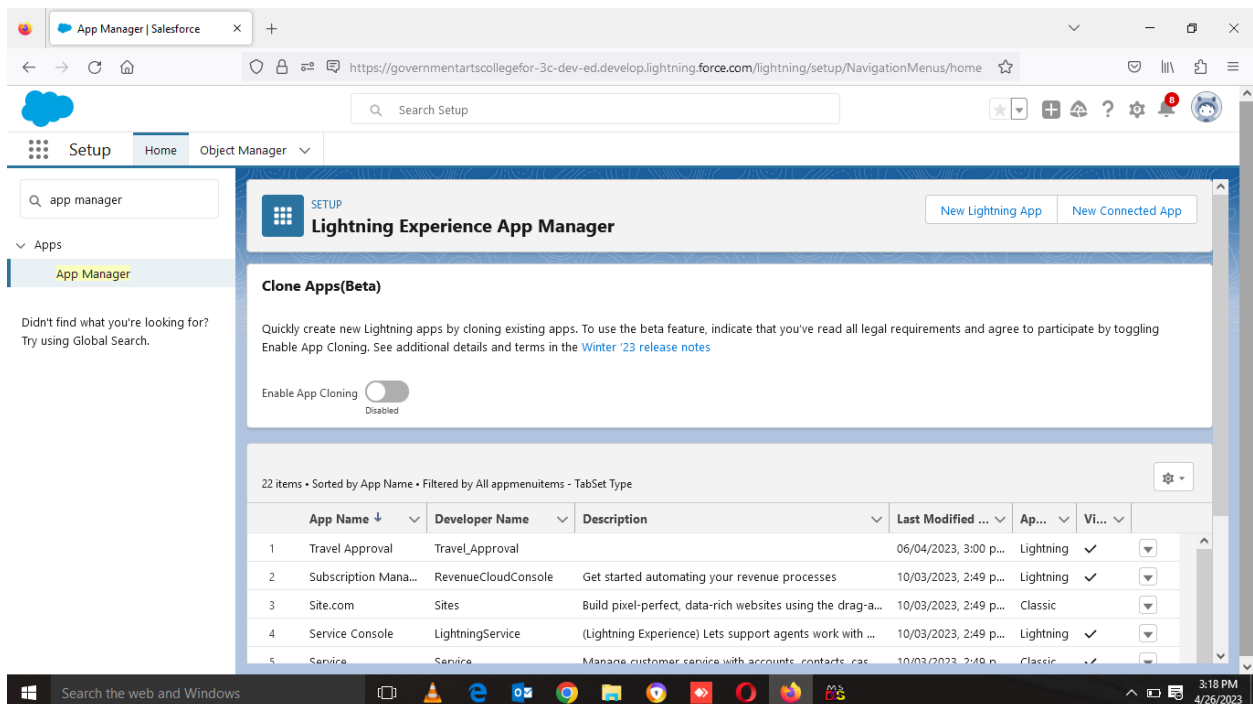
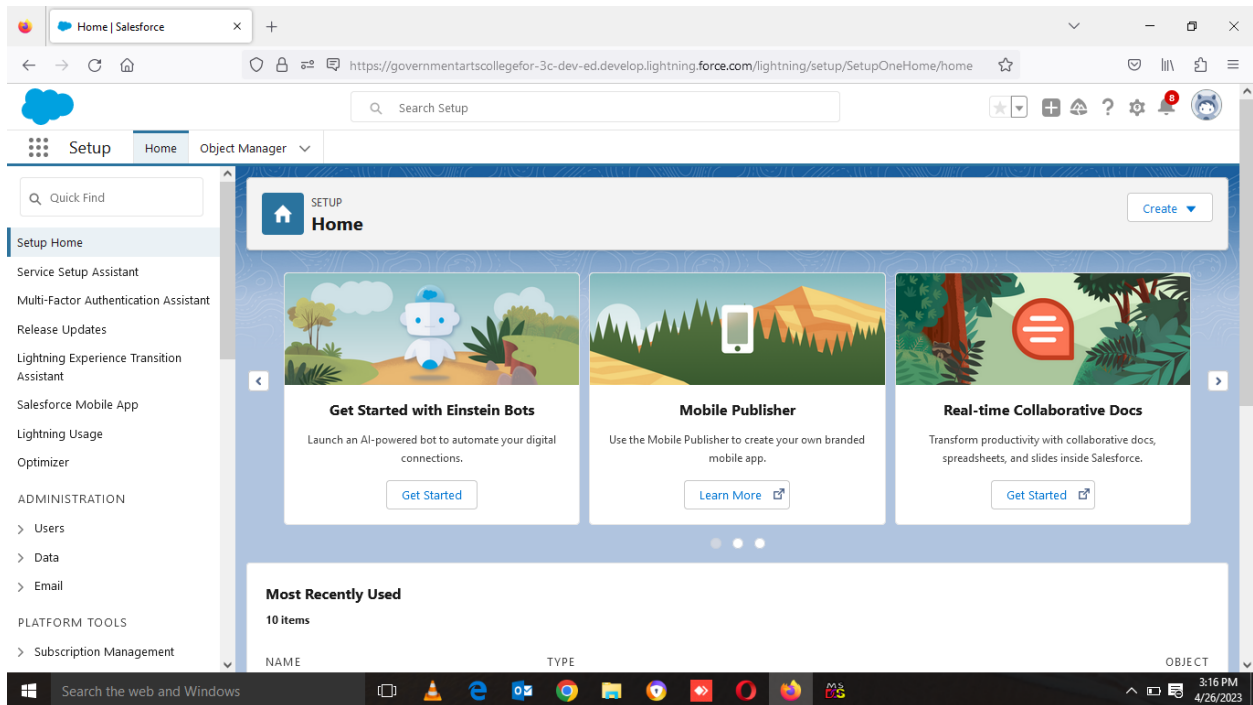


3. RESULT:

3.1 Data model:

Object name	Fields in the object	
Travel Approval	Field label	Data type
	Enter amount	currency
	Expense	Pick list
	Travel approval	Master-Detail Relationship
Expense Item	Field label	Data type
	Total Expenses	Roll-Up summery
	Status Indicator	Formula

3.2 Activity & Screenshot:



Windows 10 taskbar at the bottom shows the time as 3:17 PM on 4/26/2023. The browser window displays the Salesforce Setup page for Custom Tabs. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a section for 'Custom Object Tabs' with a table listing various tabs and their styles.

Action	Label	Tab Style	Description
Edit Del	Attendees	Chakboard	
Edit Del	Departments	Books	
Edit Del	Events	Ticket	
Edit Del	Expense Items	Train	
Edit Del	Seekaters	Alarm clock	
Edit Del	Travel Approvals	Camera	
Edit Del	Vendors	Building	

Windows 10 taskbar at the bottom shows the time as 3:49 PM on 4/26/2023. The browser window displays the Salesforce Setup page for Object Manager. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Object Manager' and includes a 'Quick Find' search bar. Below the title, there is a section for 'Fields & Relationships' with a table listing various fields and their types.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total Expense	Total_Expense_c	Roll-Up Summary (SUM Expense Item)		▼
Total Expenses	Total_Expenses_c	Roll-Up Summary (SUM Expense Item)		▼
Travel Approval #	Name	Auto Number		✓

Expense Item | Salesforce

https://governmentartscollegefor-3c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w00...

Setup Home Object Manager

SETUP > OBJECT MANAGER
Expense Item

Details

Fields & Relationships
7 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Expense	Expense_c	Picklist		
Expense Item Name	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Status Indicator	Status_Indicator_c	Formula (Text)		
Travel Approval	Travel_Approval_c	Master-Detail(Travel Approval)		✓

Search the web and Windows

3:49 PM 4/26/2023

Users | Salesforce

https://governmentartscollegefor-3c-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

user

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
User Interface
Action Link Templates
Actions & Recommendations

SETUP
Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

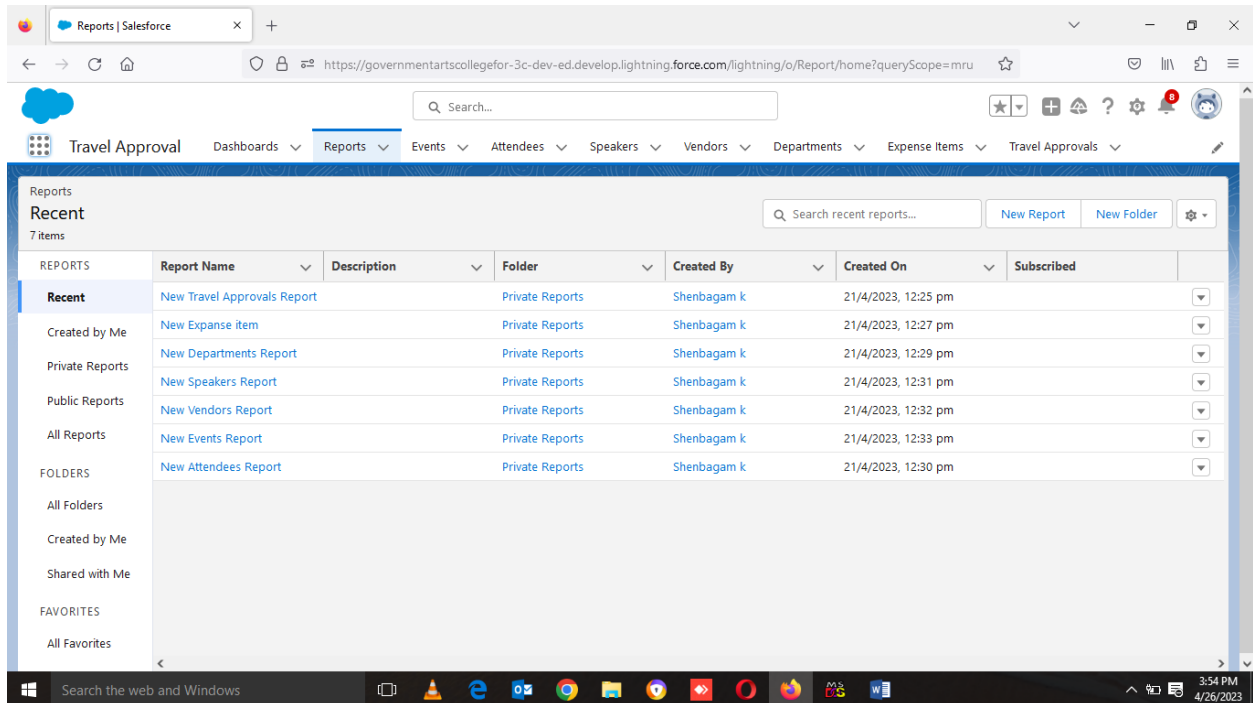
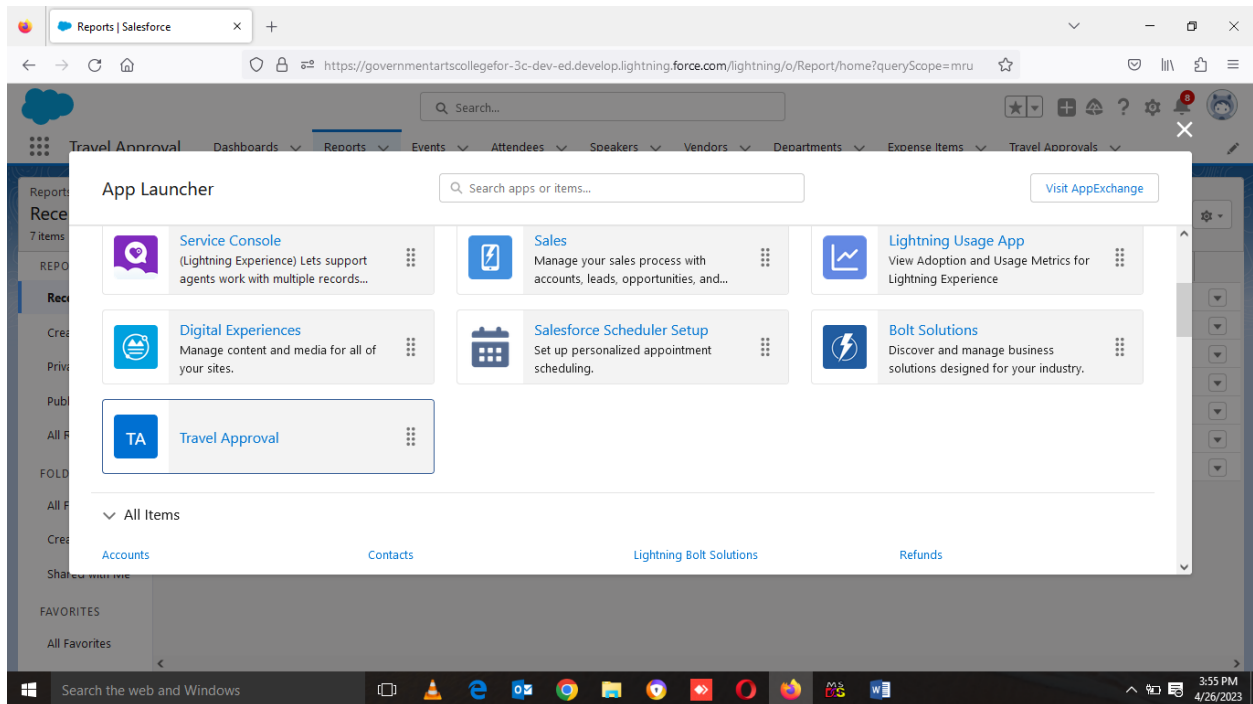
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chattv00d2v00000rjvw4ead,nqhty6grn4xv@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	S. Shenbagam	Sik	shenbagamracw@college.com		✓	System Administrator
<input type="checkbox"/> Edit	K. Shenbagam	sk	shenbagam04@gmail.com	CEO	✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2v00000rjvw4ead.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d2v00000rjvw4ead.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Search the web and Windows

3:51 PM 4/26/2023



4. Trailhead Profile Public URL:

Team Lead-<https://trailblazer.me/id/shenk36>

Team Member 1-<https://trailblazer.me/id/snehas59>

Team Member 2-<https://trailblazer.me/id/chitb2>

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

5. ADVANTAGES:

- ❖ The process is tedious and time consuming task.
- ❖ Easiest way.
- ❖ Save time for both employees and managers.
- ❖ Reduces the Workload.
- ❖ Provides greater control and security over employee travel.

DISADVANTEGES:

- ❖ The process includes 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.
- ❖ Poor communication.

6. 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.

- ❖ The application saves time for both the employee and the travel manager by automating the travel request and approval process. This allows the HR department and travel managers to focus on more strategic task.

7. 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.

8. 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.