

GOVERNMENT ARTS COLLEGE FOR WOMEN

SALEM-8

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BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

1. INTRODUCTION

1.1 OVERVIEW

Every travel organization requires a travel approval application. This department deals with the approval of travel requests. It also allows for prime levels of control and oversight over travel bookings, policy and budget. The approval process is usually often lengthy and requires a lots of paper work. This travel application will help them in keeping track of the complete travel approval process.

1.2 PURPOSE

A travel application helps gather employee trip details and allows you to reject or approve their travel and reimburse their expenses. Travel applications provide you all helps that your travel needs, such as location details, ticket booking cost, restaurant details, ticket booking facility, facility to book accommodation, taxi, and explore local experiences. Tourists can also decide when to visit this location, with the updates provided on whether.

1.3 OBJECTIVE :

- This project gives real time knowledge of salesforce.
- This project gives best experience in salesforce.
- To create travel approval application is helpful for corporate employees.
- This project helps to me how to create travel approval application in salesforce.
- In working my project, I learn what is the benefits of using salesforce.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 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.

Says
What have we heard them say?
What can we imagine them saying?

Benefits of create travel application for employees?

What is travel approval app?

What is the procedure for build an employee travel application?

What are the required documents?

Check the travel application website

What is travel formalities?

What are the problems for travel?

Why do we need travel application for employees?

It this application safety for employees?

How the employees reach travel application?



Employees application safe and secure.

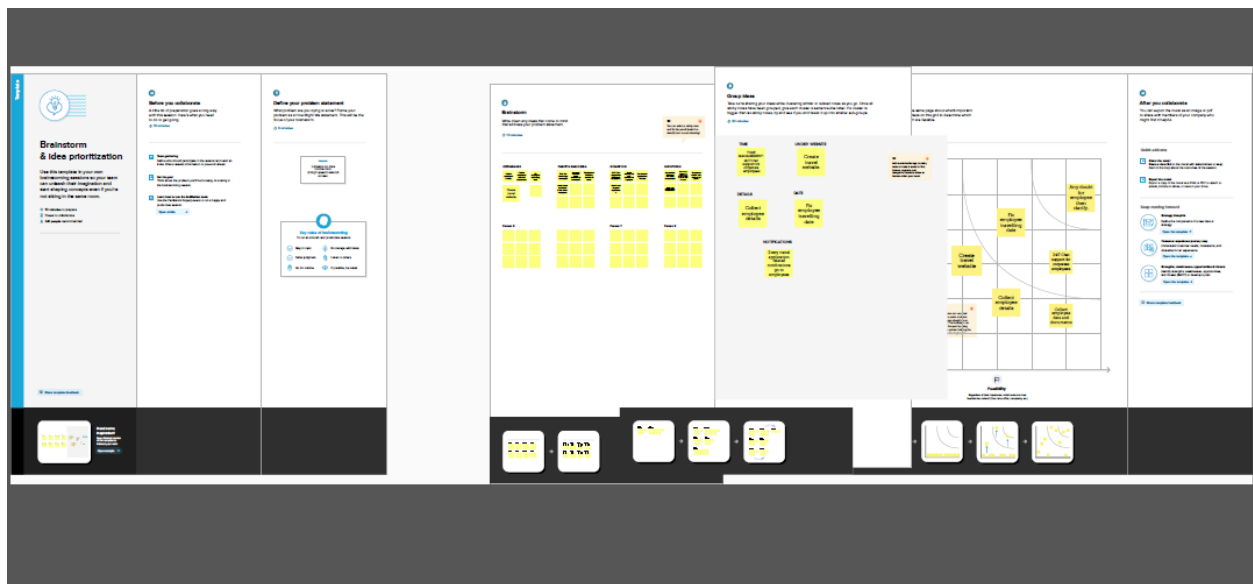
It is useful for corporate employees

Feedback of employers after using the application.

Thinks
What are their wants, needs, hopes, dreams?
What other thoughts influence their behavior?

BUILD AN EMPLOYEE APPROVAL APPLICATION FOR CORPORATES

2.2 IDEATION & BRAINSTORMING MAP SCREENSHOT



3. RESULT

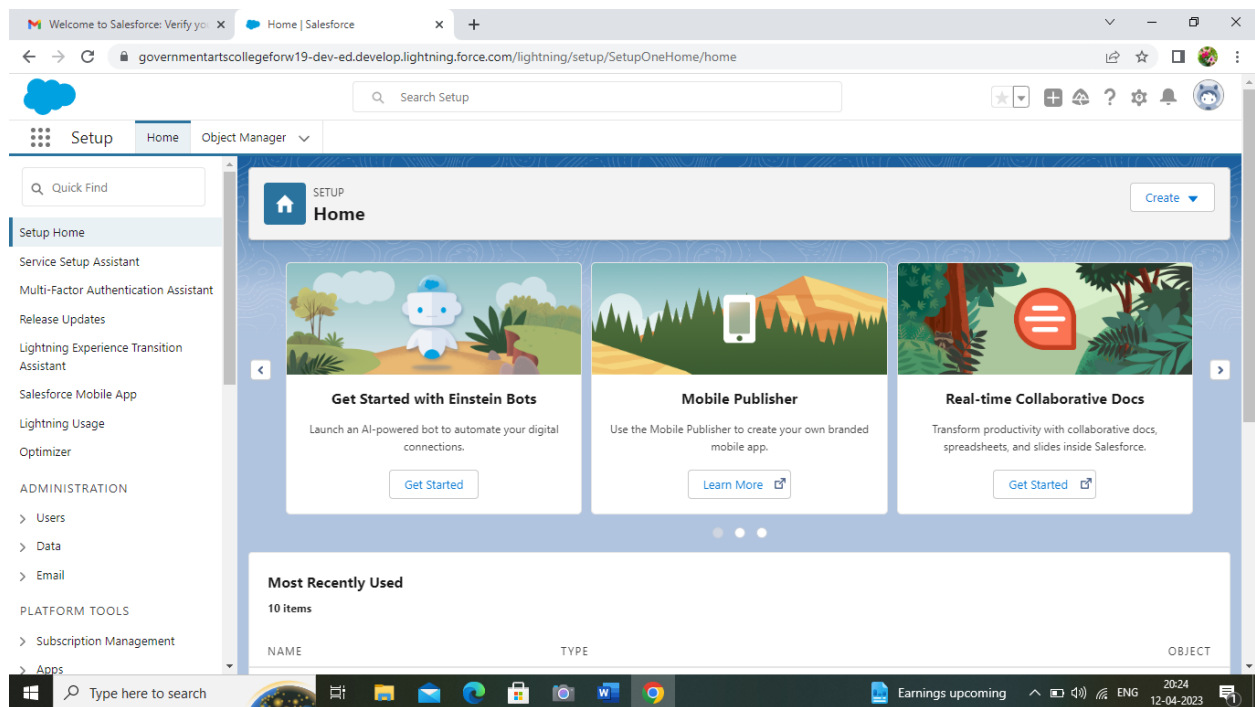
3.1 Data Model:

Object Name	Fields in the object																				
1.Department	<table><tr><th>Field Label</th><th>Data type</th></tr><tr><td>Department Code</td><td>Text</td></tr></table>	Field Label	Data type	Department Code	Text																
Field Label	Data type																				
Department Code	Text																				
2.Expense Item	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Amount</td><td>Currency</td></tr><tr><td>Expense Type</td><td>Picklist</td></tr><tr><td>Travel Approval</td><td>Master-Detail Relationship</td></tr></table>	Field Label	Data Type	Amount	Currency	Expense Type	Picklist	Travel Approval	Master-Detail Relationship												
Field Label	Data Type																				
Amount	Currency																				
Expense Type	Picklist																				
Travel Approval	Master-Detail Relationship																				
3.Travel Approval	<table><tr><th>Field Label</th><th>Data Type</th></tr><tr><td>Department</td><td>Lookup Relationship</td></tr><tr><td>Destination State</td><td>Text</td></tr><tr><td>Out-of-State</td><td>Checkbox</td></tr><tr><td>Purpose of Trip</td><td>Text Area</td></tr><tr><td>Status</td><td>Picklist</td></tr><tr><td>Status indicator</td><td>Formula</td></tr><tr><td>Total Expenses</td><td>Roll- Up summary</td></tr><tr><td>Trip Start Date</td><td>Date</td></tr><tr><td>Trip End Date</td><td>Date</td></tr></table>	Field Label	Data Type	Department	Lookup Relationship	Destination State	Text	Out-of-State	Checkbox	Purpose of Trip	Text Area	Status	Picklist	Status indicator	Formula	Total Expenses	Roll- Up summary	Trip Start Date	Date	Trip End Date	Date
Field Label	Data Type																				
Department	Lookup Relationship																				
Destination State	Text																				
Out-of-State	Checkbox																				
Purpose of Trip	Text Area																				
Status	Picklist																				
Status indicator	Formula																				
Total Expenses	Roll- Up summary																				
Trip Start Date	Date																				
Trip End Date	Date																				

3.2 ACTIVITY & SCREENSHOT

Mile Stone : 1

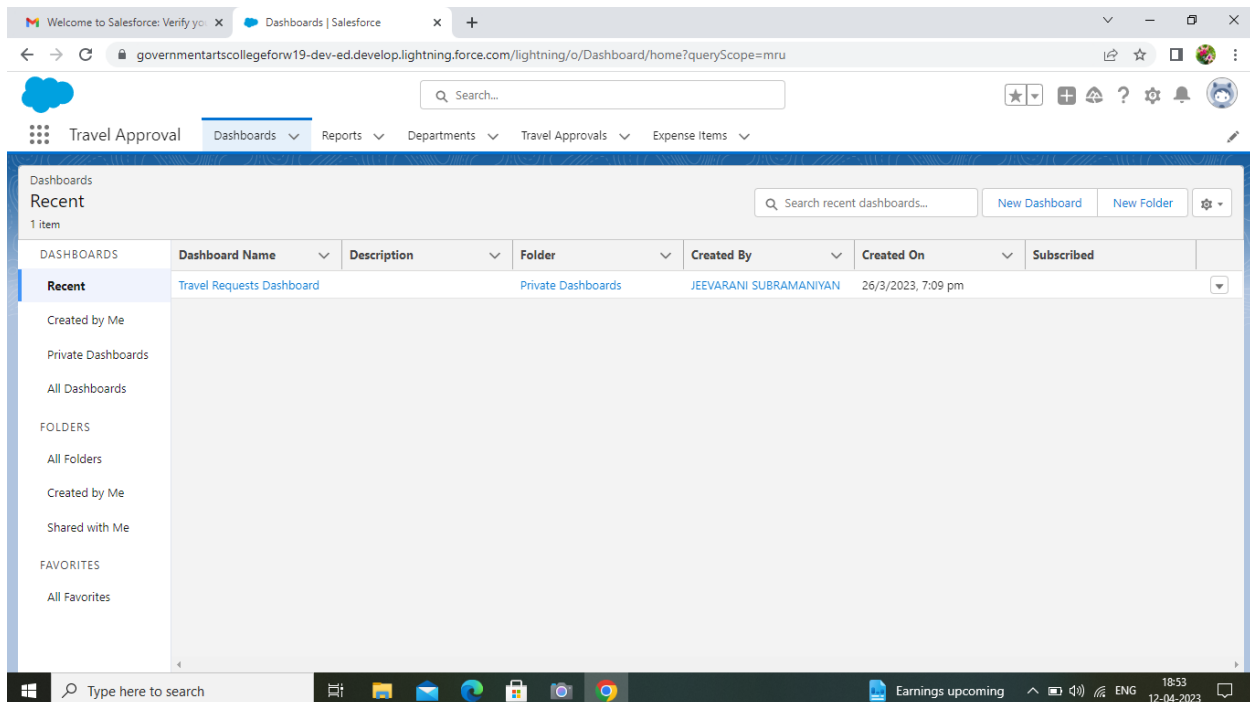
Create Salesforce Org:



Mile Stone:2

Create the Travel Application:

The App Manager is your go to place for managing apps for lightning experience . It shows all your connected apps and salesforce apps.



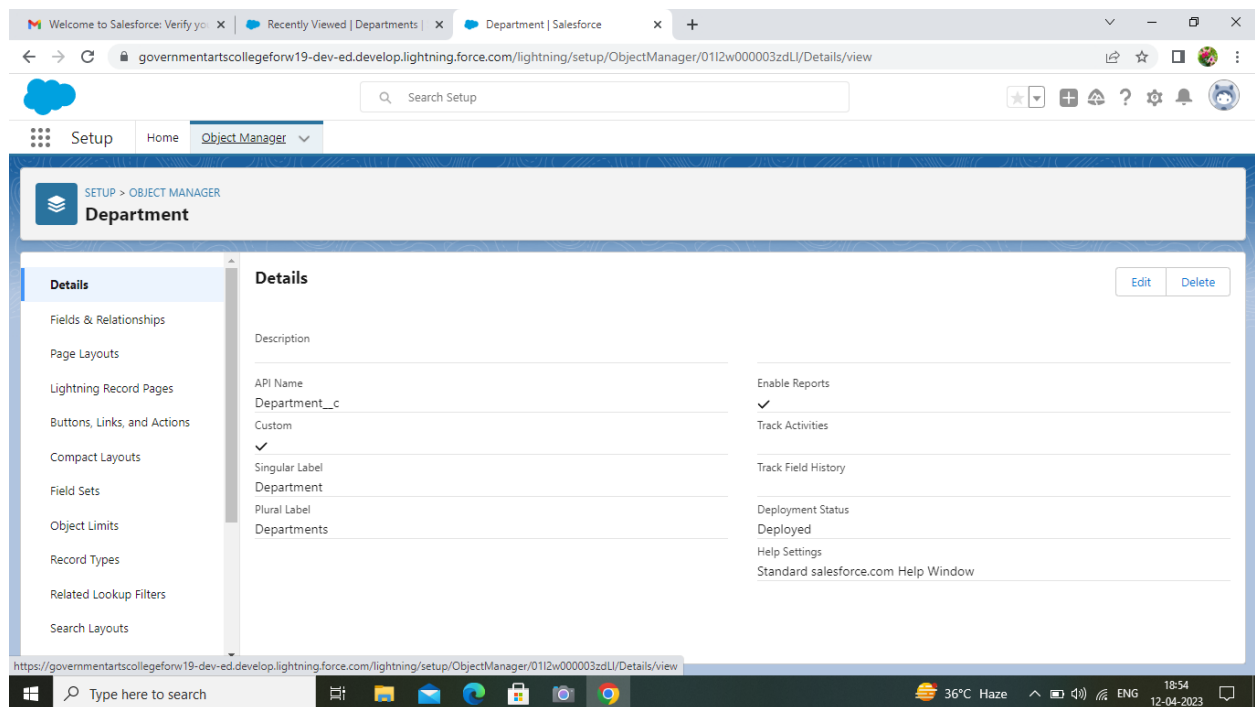
From setup, enter app manager in quick find box and select app manager . Click new lightning app. Enter app name travel approval and select necessary custom object . Select profile as system administrator and click finish. Finally Travel approval application is created.

Mile Stone :3

Custom object creation:

Objects are database tables that permit you to store data that is specific to an organization.

Create Department object



Create Travel Approval Object :

The screenshot shows the Salesforce Object Manager interface for a custom object named "Travel Approval". The browser address bar indicates the URL: `governmentartscollegeforw19-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003zdOQ/Details/view`. The Salesforce navigation bar at the top includes "Setup", "Home", and "Object Manager".

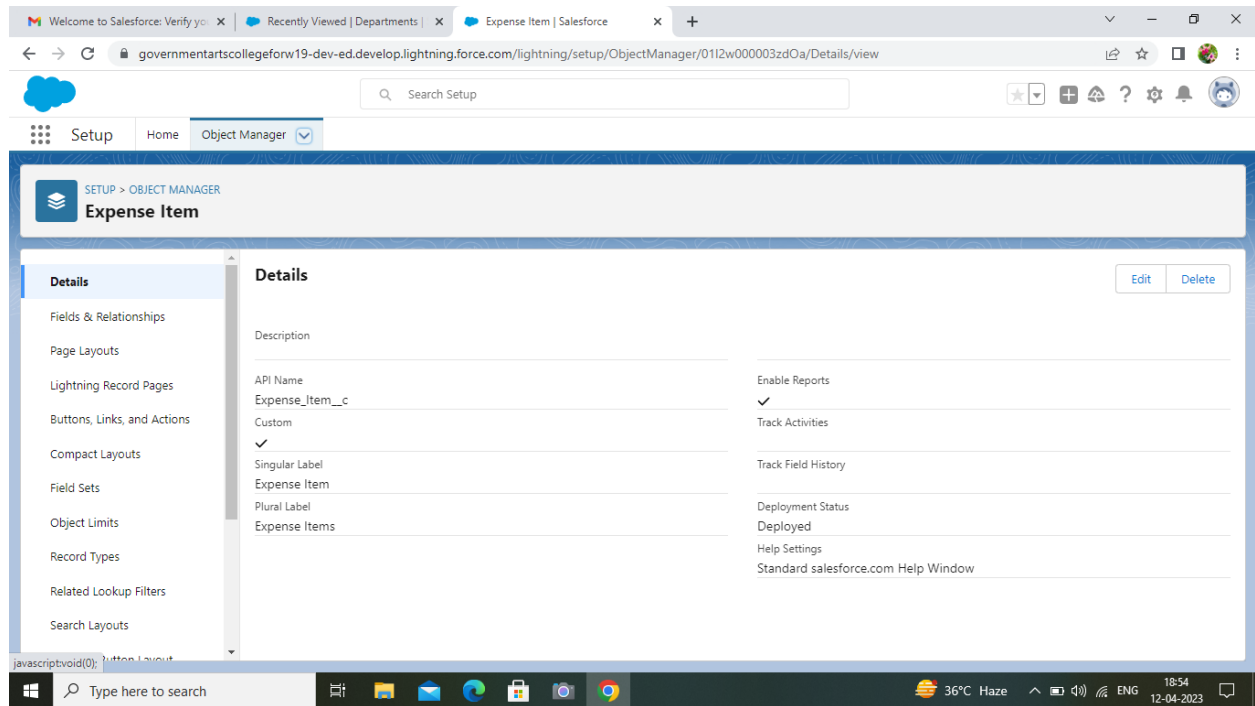
The main content area is titled "Travel Approval" and includes a left-hand navigation menu with the following options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The "Details" section is currently selected.

The "Details" section displays the following information:

- Description:** (Empty text area)
- 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`

At the top right of the details section, there are "Edit" and "Delete" buttons. The bottom of the screen shows a Windows taskbar with the search bar, application icons, and system tray information including the date and time (18:54, 12-04-2023).

Create expense item object :

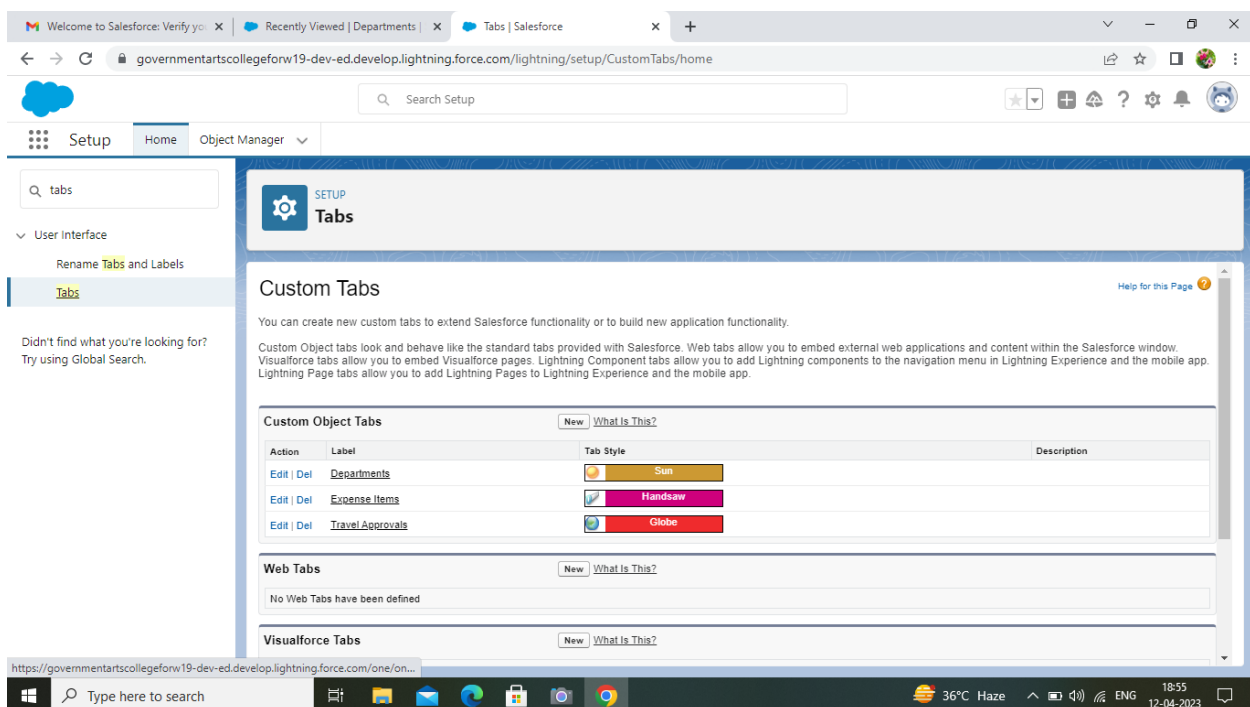


First, I have to create custom objects. From setup page click object manager , click create, click on custom object. Enter the label name Department and plural label name Departments .click on allow report, allow search and save. In this way we have to create travel approval and expense item object.

Mile Stone : 4

Create custom Tab:

Tabs in salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

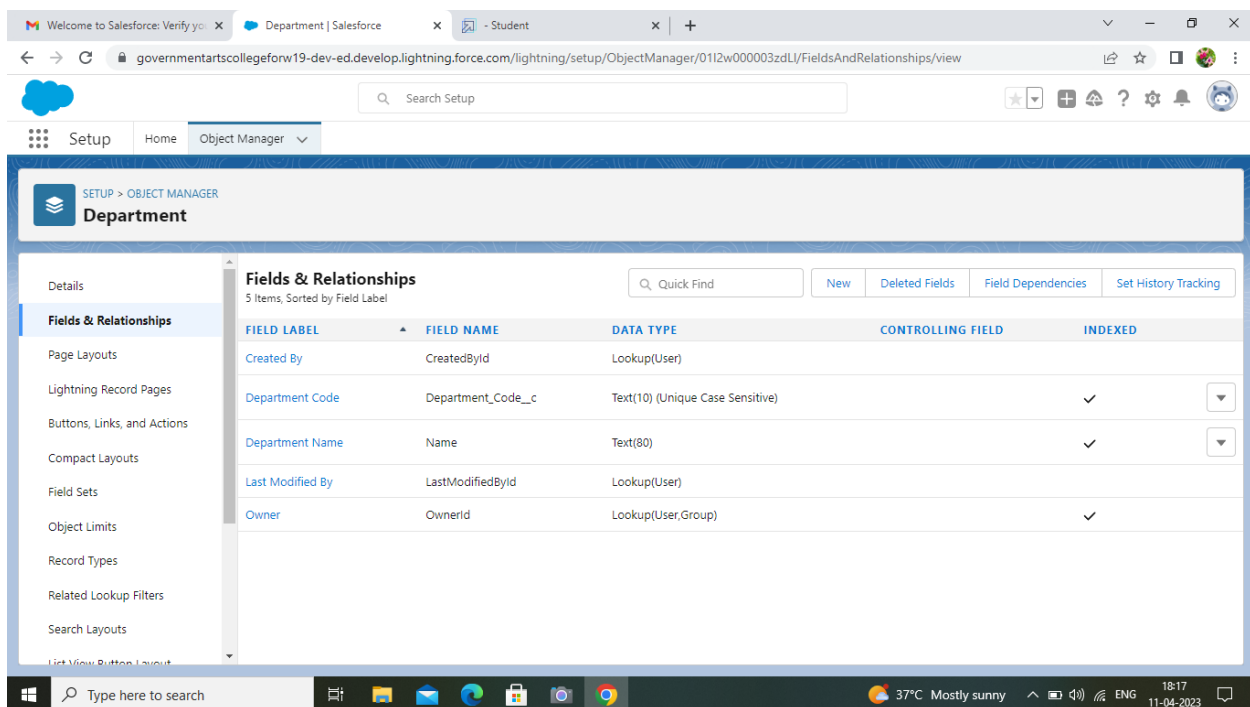


Click the home tab and select Tabs. Under custom objects tabs, click new. For objects choose already create a custom objects department, travel approval, expense item . For Tab style, select any icon. Click next and save.

Mile Stone :5

Create -Fields & Relationship:

Fields in salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record. There are two types of fields in salesforce.



The screenshot shows the Salesforce Setup interface for the 'Department' object. The 'Fields & Relationships' section is active, displaying a table of 5 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: 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)), and Owner (OwnerId, Lookup(User,Group)).

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)		✓

Welcome to Salesforce: Verify your identity | Expense Item | Salesforce | Student

governmentartscollegeforw19-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003zdOa/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Expense 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
List View Button Layout

Fields & Relationships
6 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 Item Name	Name	Text(80)		✓
Expense Type	Expense_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Travel Approval	Travel_Approval__c	Master-Detail(Travel Approval)		✓

Type here to search

37°C Mostly sunny 18:17 11-04-2023

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

Fields & Relationships
13 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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		
Status Indicator	Status_Indicator__c	Formula (Text)		

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

Fields & Relationships
13 Items, Sorted by Field Label

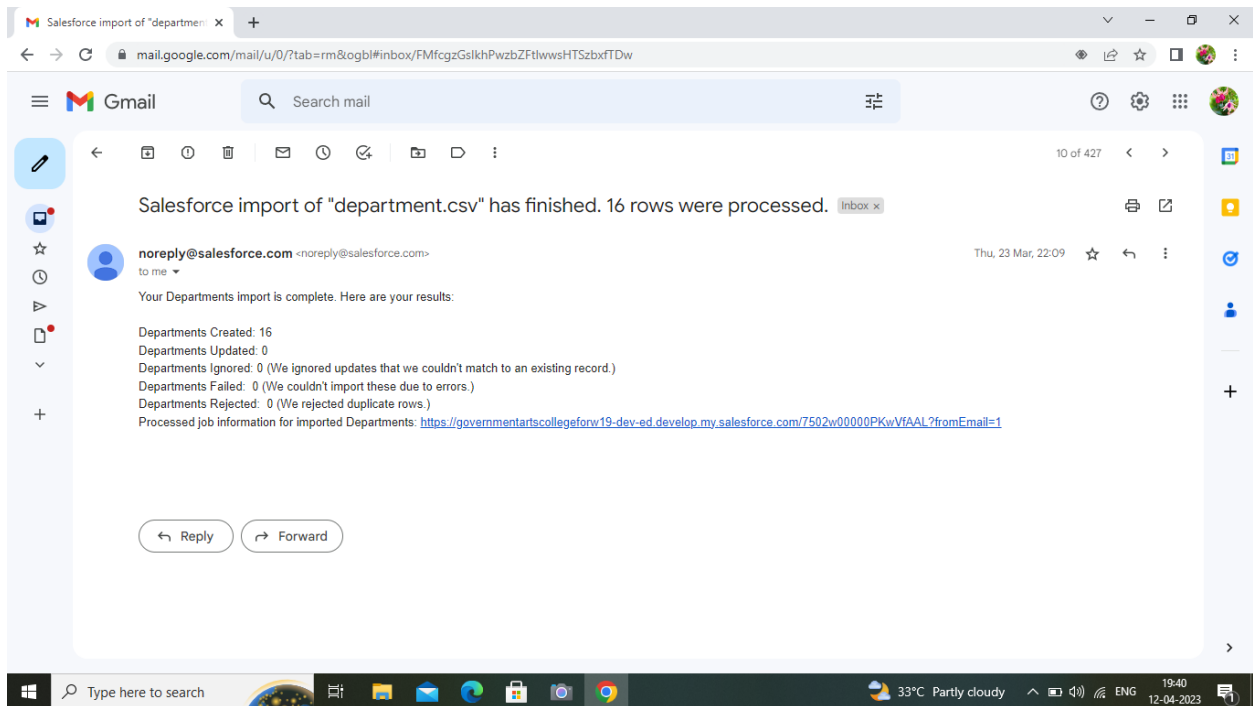
Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

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 Start Date	Trip_Start_Date__c	Date	▼
Trip End Date	Trip_End_Date__c	Date	▼

Select the required object. Click fields and relationship and click new. Select required data type for fields and enter field label and click next and save. In this way create every field and relationship.

Mile Stone :6

Import Departments:

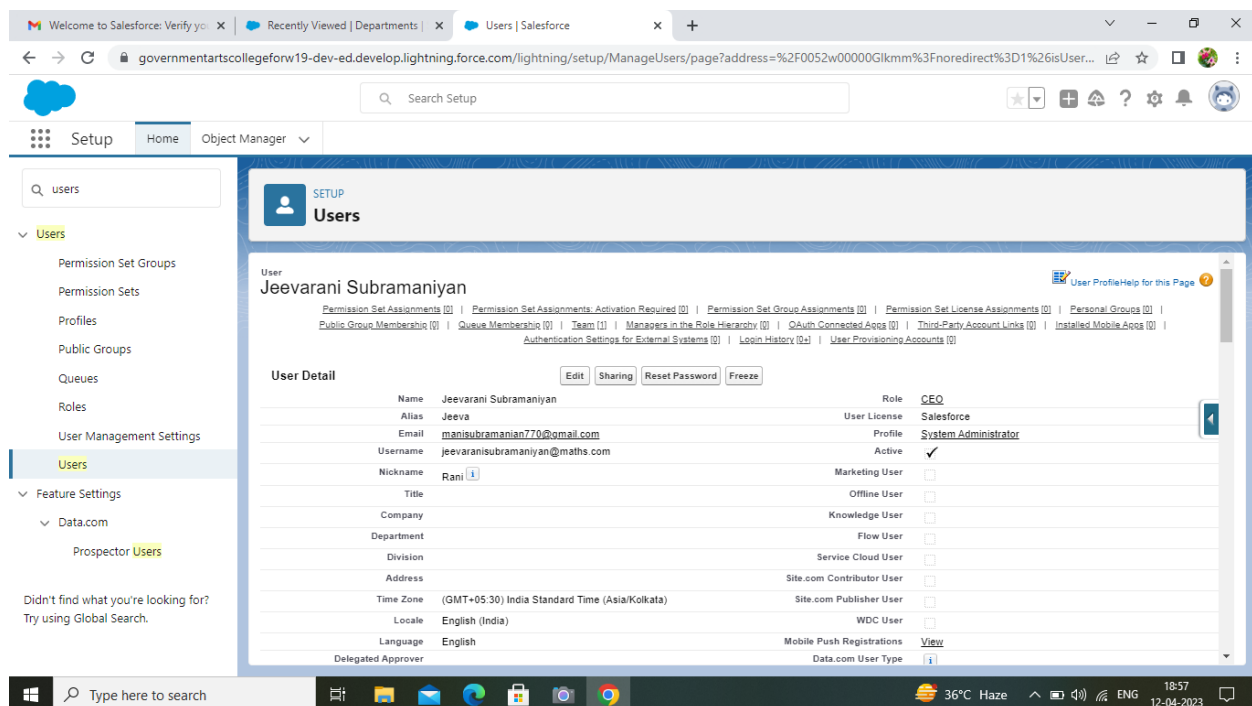


From home tab select data import wizard and click launch wizard. Click custom object tab select department object. Next select add new records. Drag and drop the Departments.csv file. Select Next. Click start import. Click ok then the records imported successfully.

Mile Stone:7

Customize User interface:

A user is anyone who logs into salesforce.



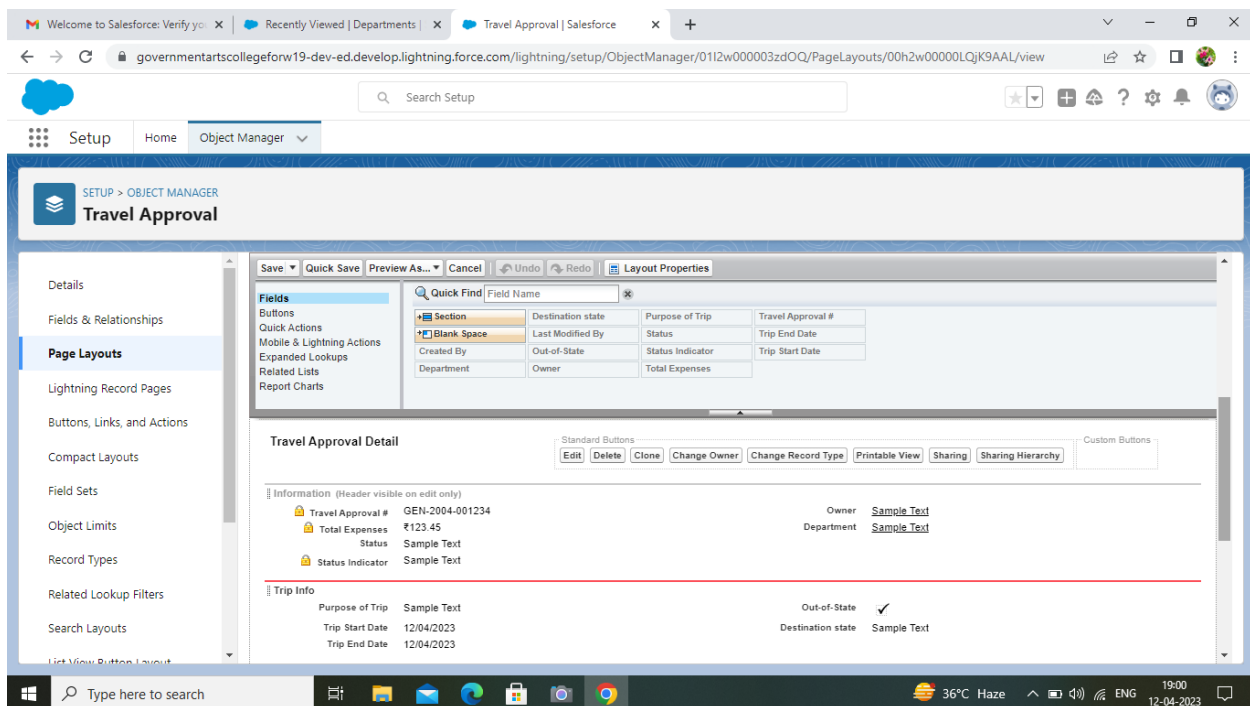
From home page select users. Click new user. Enter name, email, user name, role as CEO, profile as system administrator and license as sales force. Click save . User will be created .

Mile Stone :8

Use customization:

Customization refers to custom software development and coding to add robust features to your CRM platform.

Customize Travel Approval Page Layout:

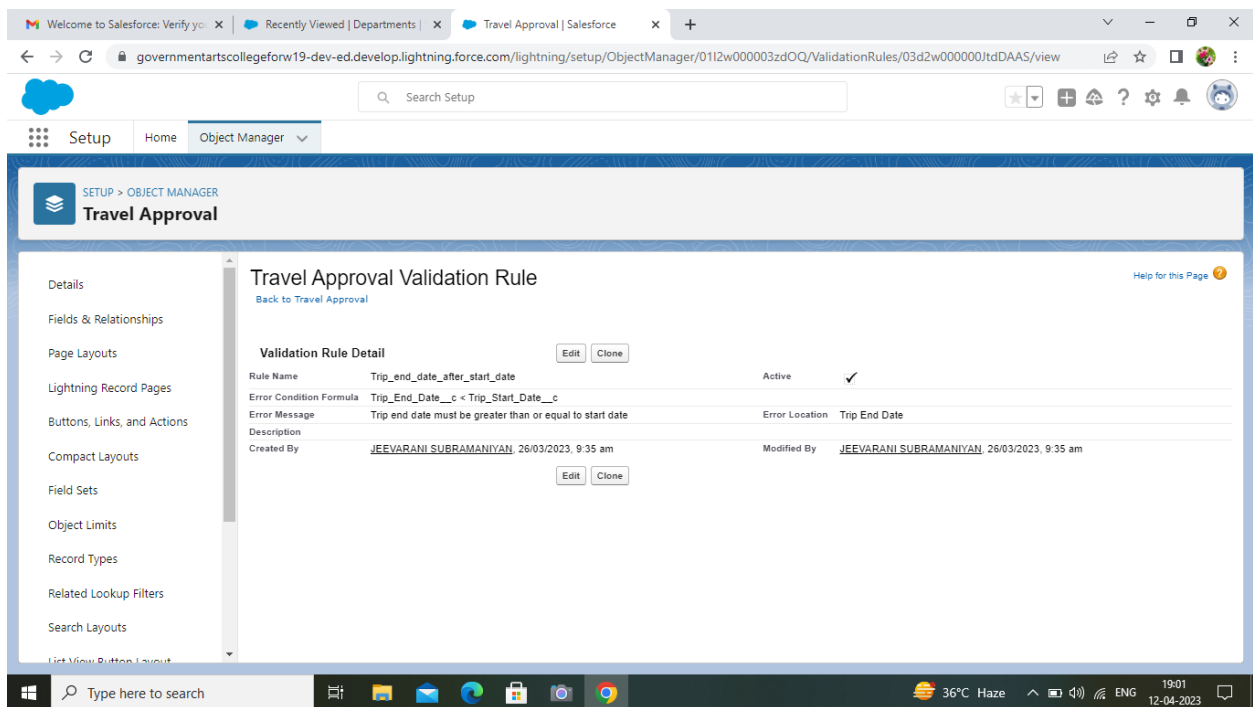


From travel approval object click page layout click edit. Drag section from the below the information section . Section name as Trip info. Drag purpose of trip, Trips start date , Trip end date fields in the trip info section. Drag out of state, destination date right hand column of the Trip info section. Drag department left hand column of trip info section to the right-hand column click save.

Mile Stone : 9

Add Business Logic to Travel App:

1.Create Validation Rule:



Select travel approval object click validation rule and enter the error condition formula. Select field and pick trip end date as the location for error.

2.Create Roll up summary Fields :

The screenshot shows the Salesforce Setup interface for the 'Travel Approval' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays the 'Custom Field Definition Detail' for a new field named 'Total Expenses'.

Field Information

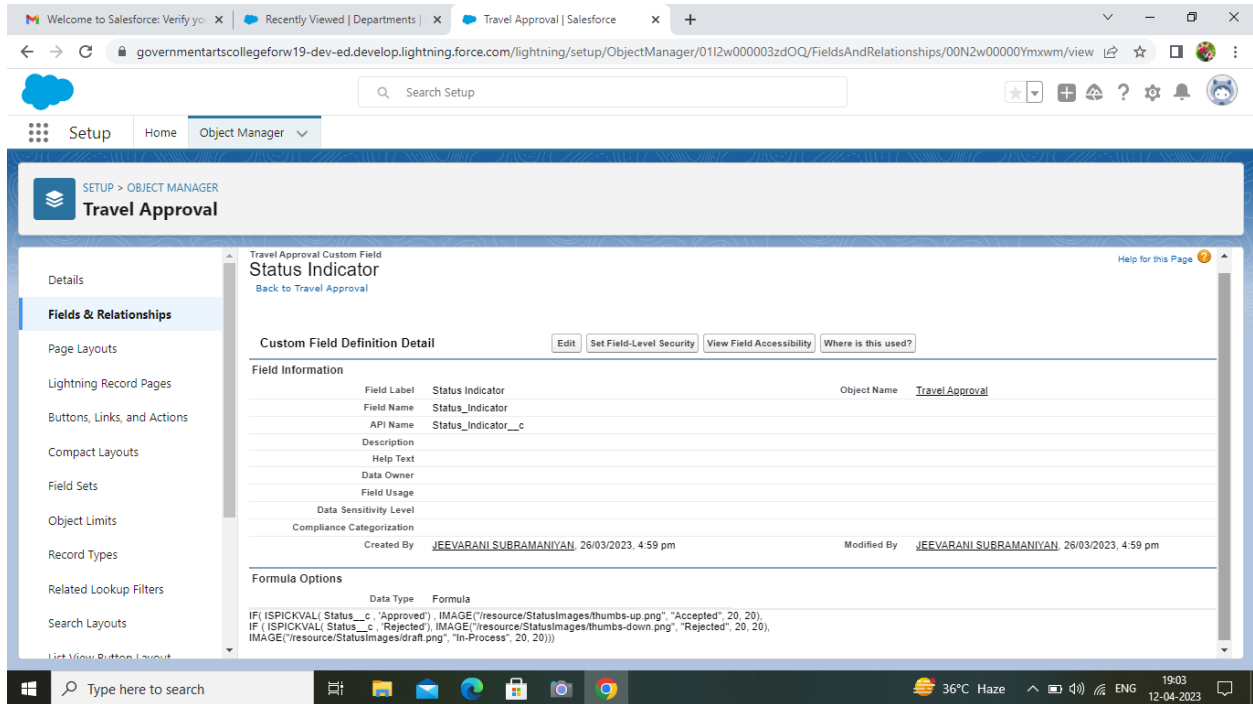
Field Label	Total Expenses	Object Name	Travel Approval
Field Name	Total_Expenses		
API Name	Total_Expenses__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	JEEVARANI SUBRAMANIAN	Modified By	JEEVARANI SUBRAMANIAN
	26/03/2023, 9:59 am		26/03/2023, 9:59 am

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	SUM
Summarized Object	Expense Item		
Field to Aggregate	Expense Item Amount		
Filter Criteria			

From travel approval object click fields click new .
Data type as rollup summary field label as total expenses .
Summarized object as Expense item. Rollup type sum . Field
amount and click save.

3.Create Formula Fields:



From home tab select static resources click new. Name status images and select the file click save. And create a status indicator field in travel approval object . Data type as formula . Enter the status indicator formula and click save.

Mile Stone:10

Reports:

Reports in salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records

are displayed as a table that can be filtered or grouped based on any field.

Report: Travel Approvals
Travel Requests by Department

Total Records: 71
Total Out-of-State: 0

Department	Travel Approval: Travel Approval #	Status	Out-of-State	Destination state	Trip Start Date	Trip End Date
Audit Services (5)	TA-00023	Approved	<input type="checkbox"/>	OK	09/03/2019	09/03/2019
	TA-00031	Approved	<input type="checkbox"/>	OK	07/08/2019	07/09/2019
	TA-00039	Approved	<input type="checkbox"/>	FL	08/07/2019	08/07/2019
	TA-00043	Approved	<input type="checkbox"/>	OK	11/04/2019	11/07/2019
	TA-00048	Approved	<input type="checkbox"/>	OK	07/08/2019	07/08/2019
Subtotal			0			
Contract Management (5)	TA-00008	Approved	<input type="checkbox"/>	OK	05/11/2019	05/11/2019
	TA-00033	Approved	<input type="checkbox"/>	GA	02/09/2019	02/09/2019
	TA-00065	Approved	<input type="checkbox"/>	TX	07/04/2019	07/04/2019
	TA-00066	Approved	<input type="checkbox"/>	CA	07/05/2019	07/08/2019
	TA-00069	Approved	<input type="checkbox"/>	TX	04/04/2019	04/04/2019
Subtotal			0			

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

Report: Travel Approvals
Travel Requests by Month

Total Records: 71

Trip End Date	Out-of-State	Travel Approval: Travel Approval #	Department	Status	Destination state	Trip Start Date
January 2019 (4)	<input type="checkbox"/> (4)	TA-00012	Division of Family Resources	Approved	TX	04/01/2019
		TA-00001	Disability Determination Bureau	Approved	OK	10/01/2019
		TA-00038	Division of Finance	Approved	TX	10/01/2019
		TA-00071	Office of General Counsel	Approved	TX	04/01/2019
Subtotal						
Subtotal						
February 2019 (1)	<input type="checkbox"/> (1)	TA-00061	Division of Family Resources	Approved	FL	12/02/2019
Subtotal						
March 2019 (4)	<input type="checkbox"/> (4)	TA-00016	Legislative Services	Approved	TX	06/03/2019
		TA-00022	Division of Finance	Approved	GA	09/03/2019
		TA-00023	Audit Services	Approved	OK	09/03/2019

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

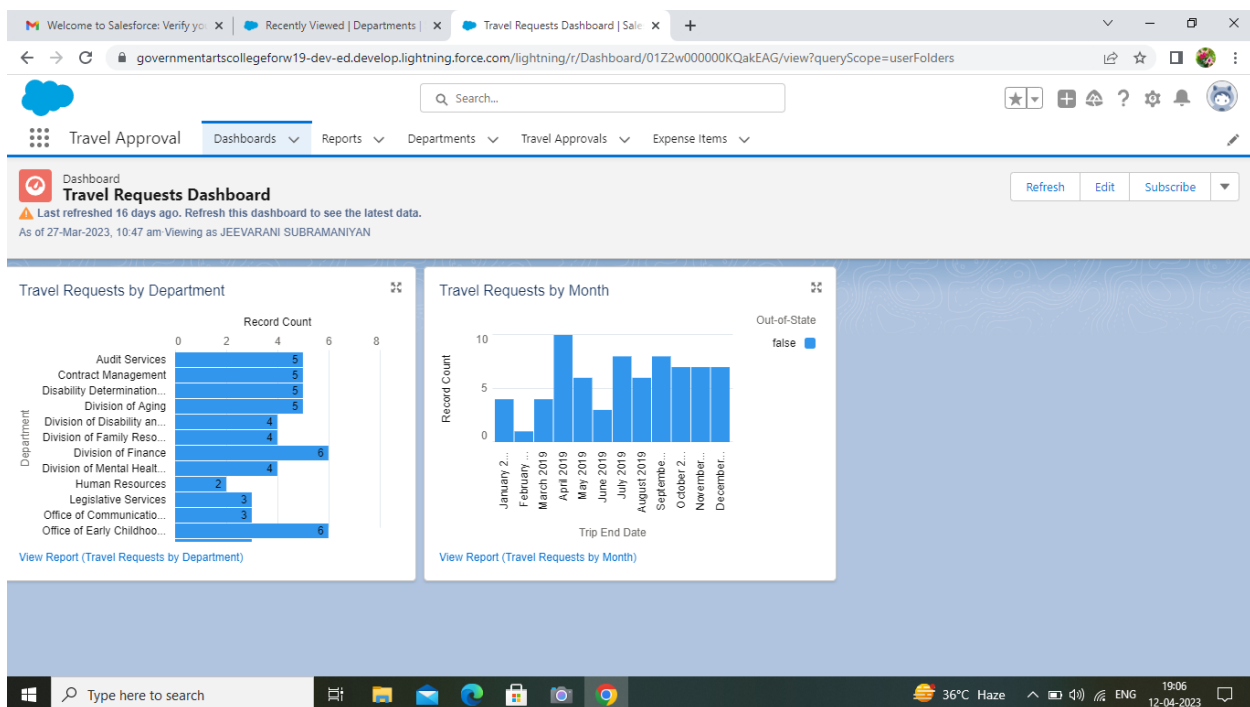
Click travel approval app select report. Click new report select the required report type and click start report. Customize your report and save or run it .Create travel request by month and travel request by department reports.

Mile Stone:11

Dashboard :

Dashboards let you curate data from reports using charts, tables, and matrices. If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

Create Travel Approvals Dashboard :



Click on Dashboard tab from the travel approval application, click on new dashboard. Give dashboard name ,

Click on + component, select the report which you created.
For the data visualization select any of the chart, table etc...

4 TRAILHEAD PROFILE PUBLIC URL

TEAM LEAD

JEEVARANI.S – <https://trailblazer.me/id/subra183>

TEAM MEMBER 1

FASHIYA RASULBE.A - <https://trailblazer.me/id/arasulbe14>

TEAM MEMBER 2

GAYATHRI.S – <https://trailblazer.me/id/ggayu17>

TEAM MEMBER 3

GOMATHI.R – <https://trailblazer.me/id/gravikumar8>

5. ADVANTAGES & DISADVANTAGES

ADVANTAGES :

1. Travel approval application is useful for employees.
2. Travel application is one place to get every service regarding travelling.
3. Travel application is tourist places, ticket booking, hotel booking, restaurant details and transportation booking you can put all these things at a place by used.
4. Travel approval will be required for domestic travel for more than five nights, any overseas travel and any dual-purpose travel.
5. Travel app will help users quickly send a travel request through a travel app.

DISADVANTAGES :

1. All users pay amount before creating a travel application.
2. Every travel application applied for travelling, then international air transport associations must be given the approval.

6. APPLICATIONS :

1. Travel application is used for every person in life.
2. This application is used for every type of travelling areas.
3. Travel app will help users quickly send a travel request through a travel app.
4. Travel apps help users to research destinations, find good flight and accommodation deals and book services.
5. This application gives a happiness and peaceful life for every user.

7. CONCLUSION :

Here we've presented the look on the salesforce platform which might provide the users with the specified travel assistant and also for the upper authorities to required care of the expenses at a point of your time through multilevel approvals of the travel request. Here the user can upload the bills to the cloud any time which is more efficient and productive. Travel approval

application allows us to arrange and monitor travel plans and expense reports for our organization using sales force platform.

8. FUTURE SCOPE :

1. An increasing number of smart phone users depend on travel apps. More than 71% of them conduct weakly searches for new destinations.
2. Travel apps with notification and alerts are very famous. Close to 45% of users find travel status updates to be a convenient feature .
3. Travel and tourism industry is becoming futuristic by inculcating new travel trends in its ecosystem making it more feasible for the public. Tourism in India provides jobs to 42.673 million people which is 8.1% of the total employment.
4. Use Travel application then all users go to all countries in the world.