

BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

Introduction

1.1 Overview

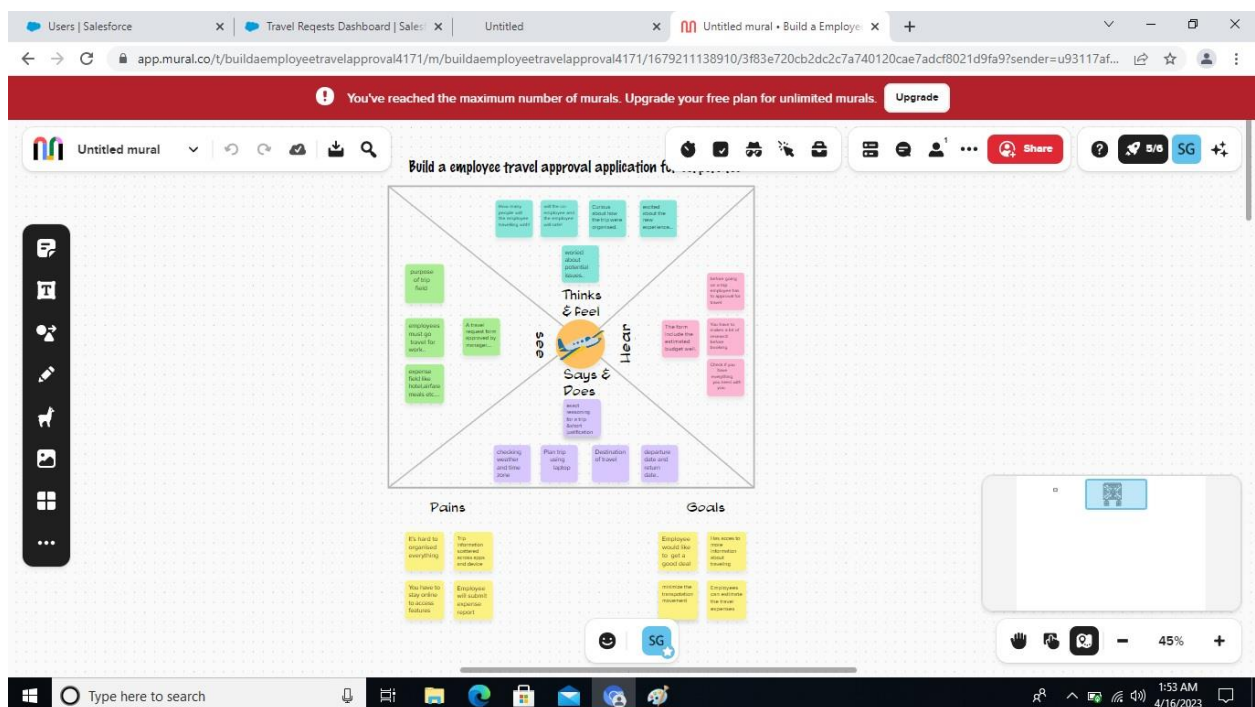
The project aim is to provide real-time knowledge for all the students who have basic knowledge of salesforce and Looking for a real-time project. This project helps in sending your travel approval requests to your manager in place of emails.

1.2 Purpose

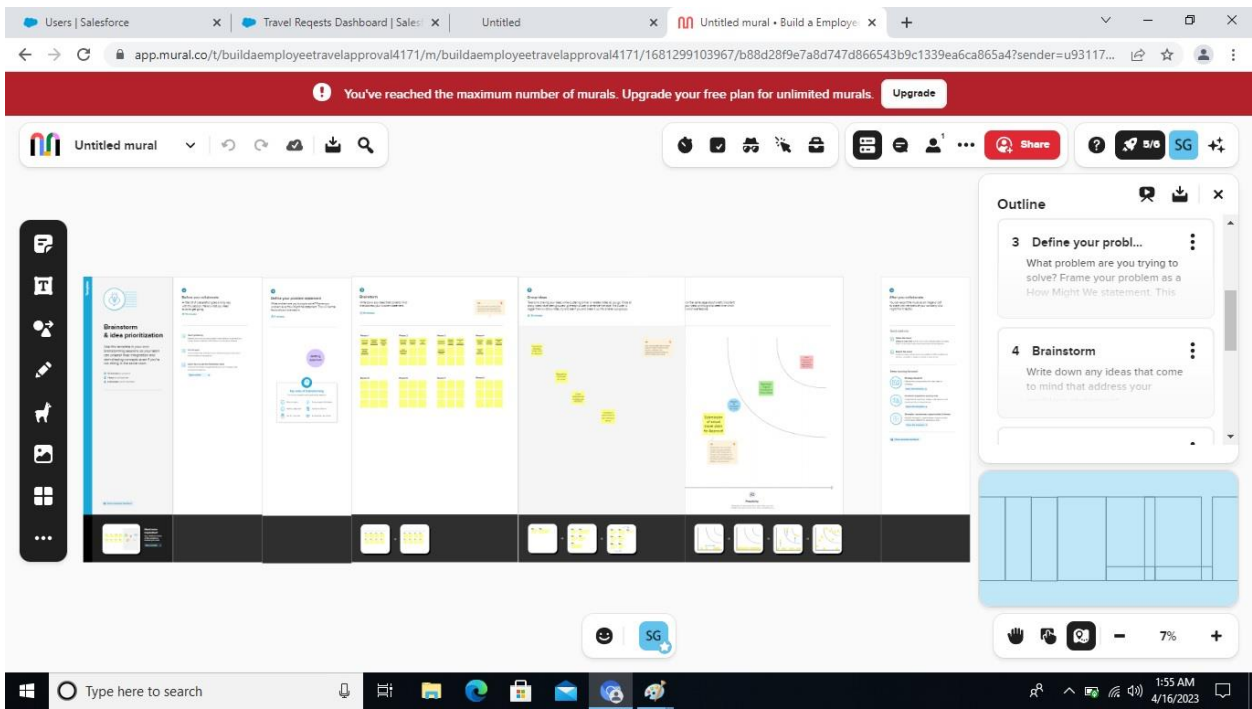
If your employees are traveling for work frequently, then a business travel request form is very essential for your company. It gives you and finance manager an idea about the business trip and travel expenses.

➤ PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy map



2.2 Ideation and brainstorming



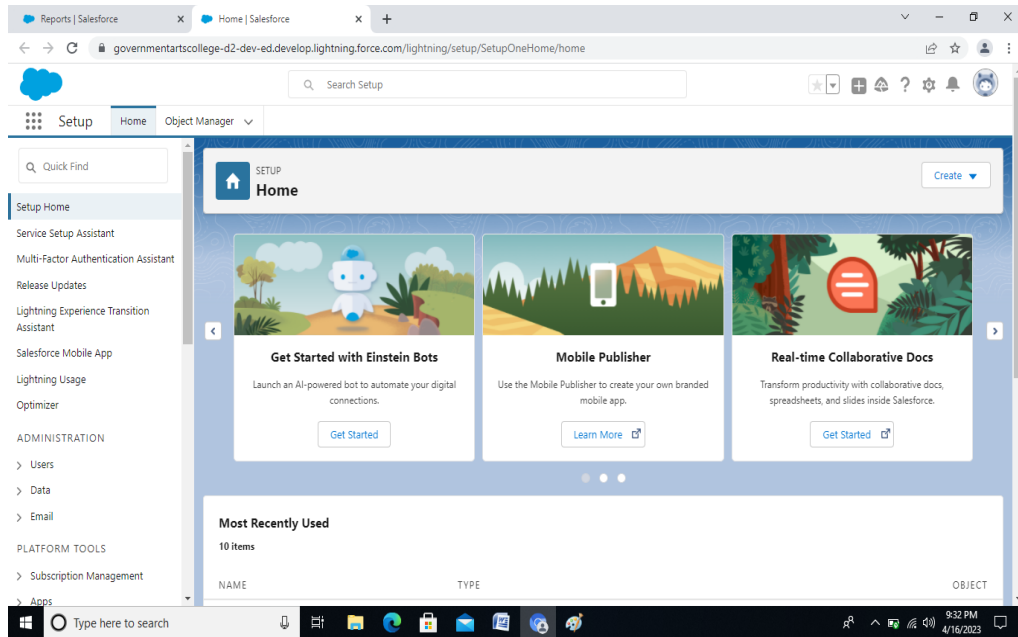
➤ Result

Object Name	Fields in the object		
Obj:1 TRAVEL APPROVAL			
	Data type	Field label	
	Master detail relationship	Travel approval	
Obj:2 EXPENSE FIELD			
	Data type	Enter values	
	picklist	Airfare, Hotel, Rentalcars, Meals, Others	
Obj:3 AMOUNT			
	Data type	Length	Decimal place
	Currency	16	2

3.2 Activity & Screenshot:

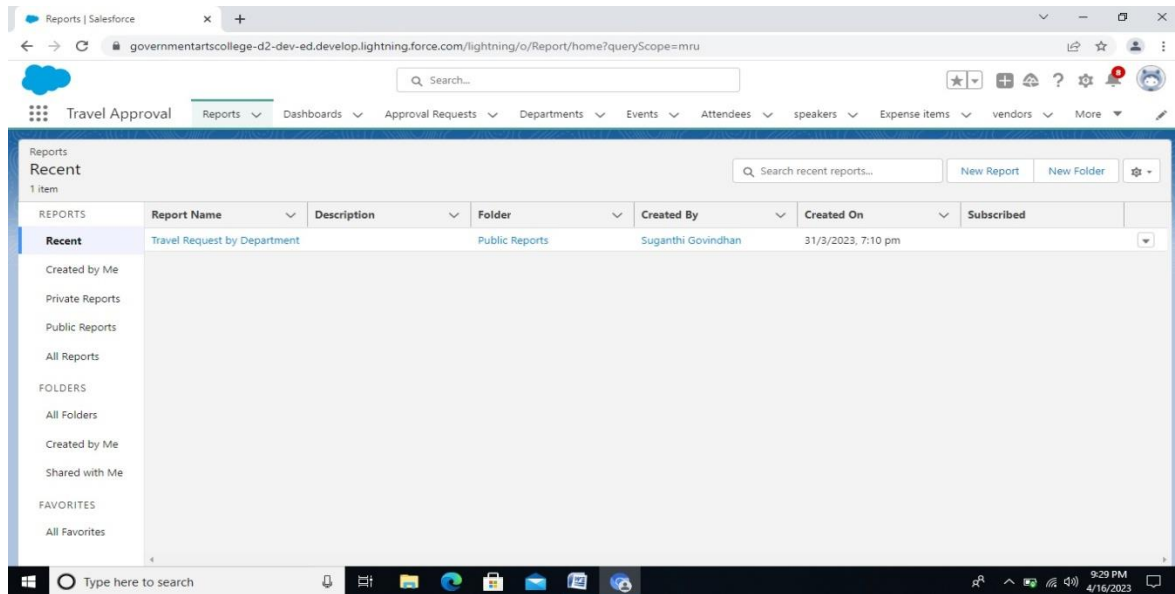
Milestone:1

Activity:1



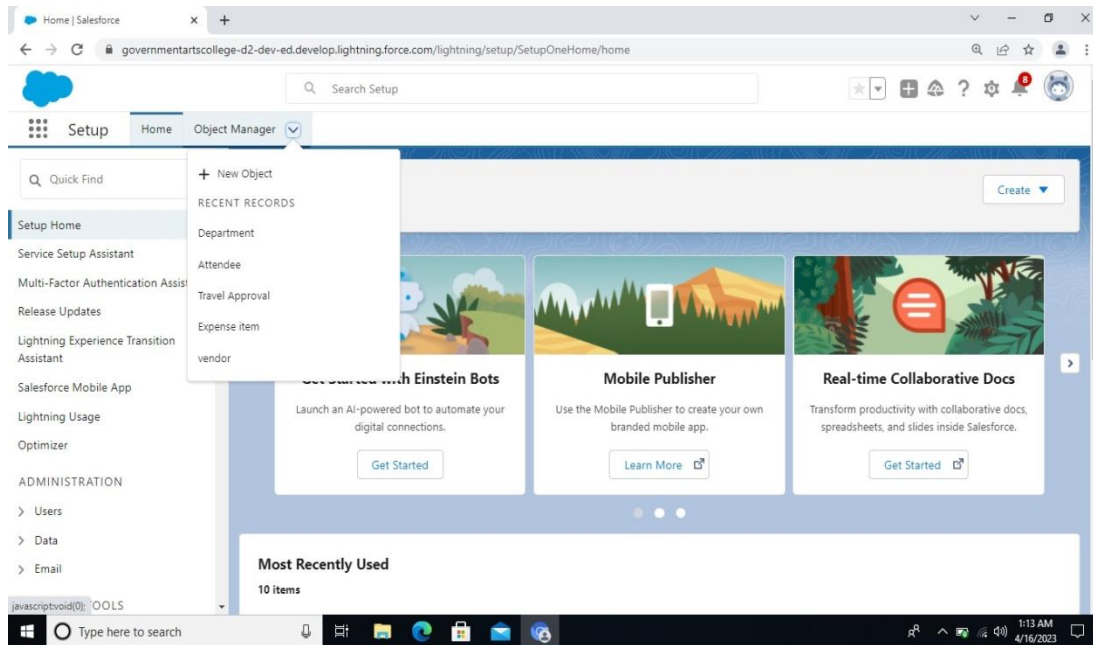
Milestone:2

Activity:1



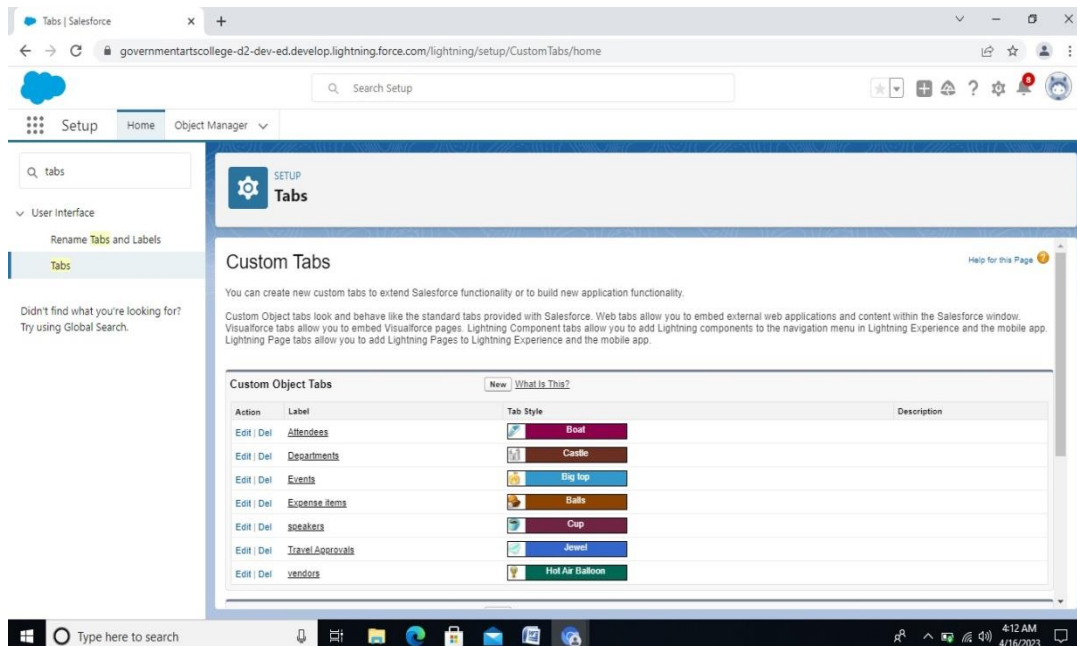
Milestone:3

Activity:1



Milestone:4

Activity:1



Milestone:4

Activity:1

Travel Approval | Salesforce

governmentartscollege-d2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003k6qZ/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

Travel Approval

Details

Fields & Relationships

14 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)		
Expense Item	Expense_Item__c	Roll-Up Summary (SUM Expense Item)		
Expense Type	Expense_Type__c	Picklist		
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	StatusIndicator__c	Formula (Text)		
Travel Approval #	Name	Auto Number		✓
Trip End date	Trip_End_date__c	Date		
Trip start Date	Trip_start_Date__c	Date		

Type here to search

1:36 AM 4/16/2023

Activity:2

Department | Salesforce

governmentartscollege-d2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003k5SP/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

Department

Details

Fields & Relationships

6 Items, Sorted by Field Label

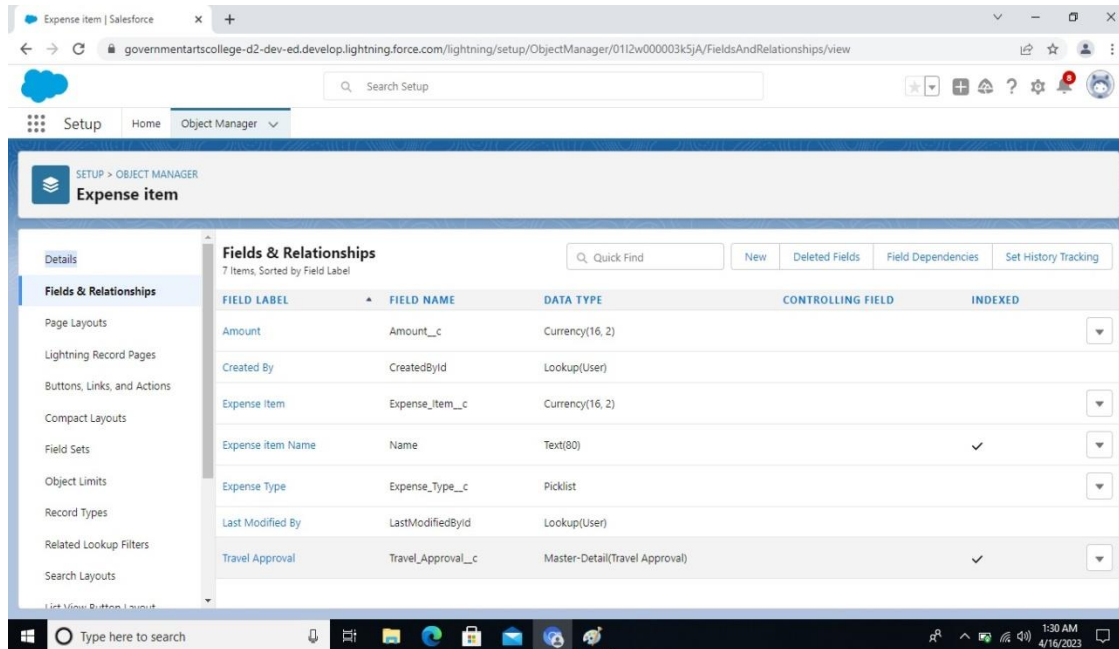
Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department	Department__c	Lookup(Department)		✓
Department Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Travel Approval	Travel_Approval__c	Lookup(Travel Approval)		✓

Type here to search

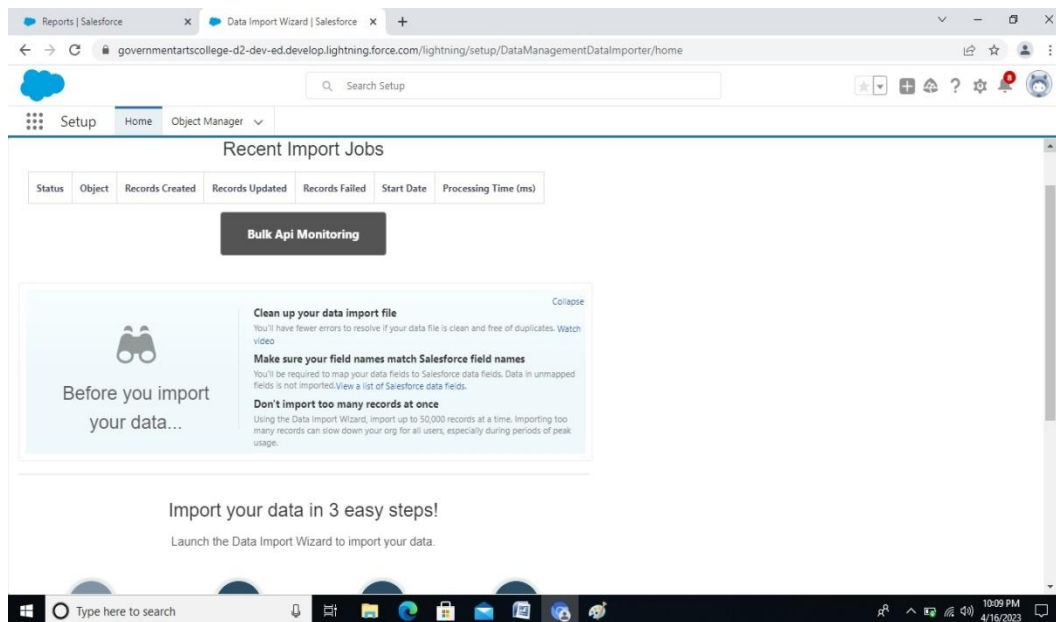
1:28 AM 4/16/2023

Activity:3



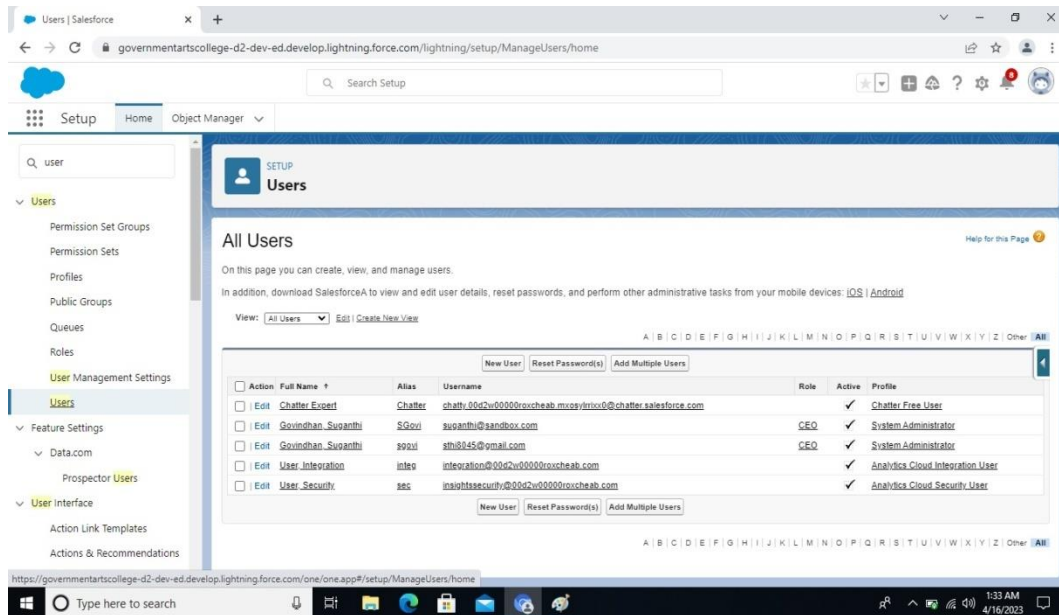
Milestone5:

Activity1:



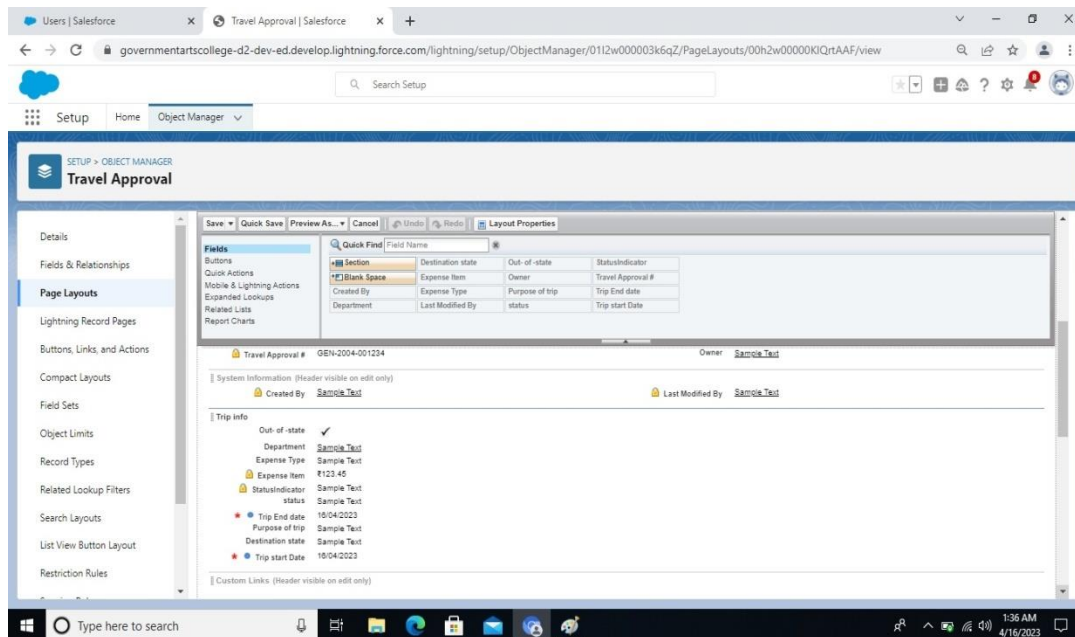
Milestone 6:

Activity 1:



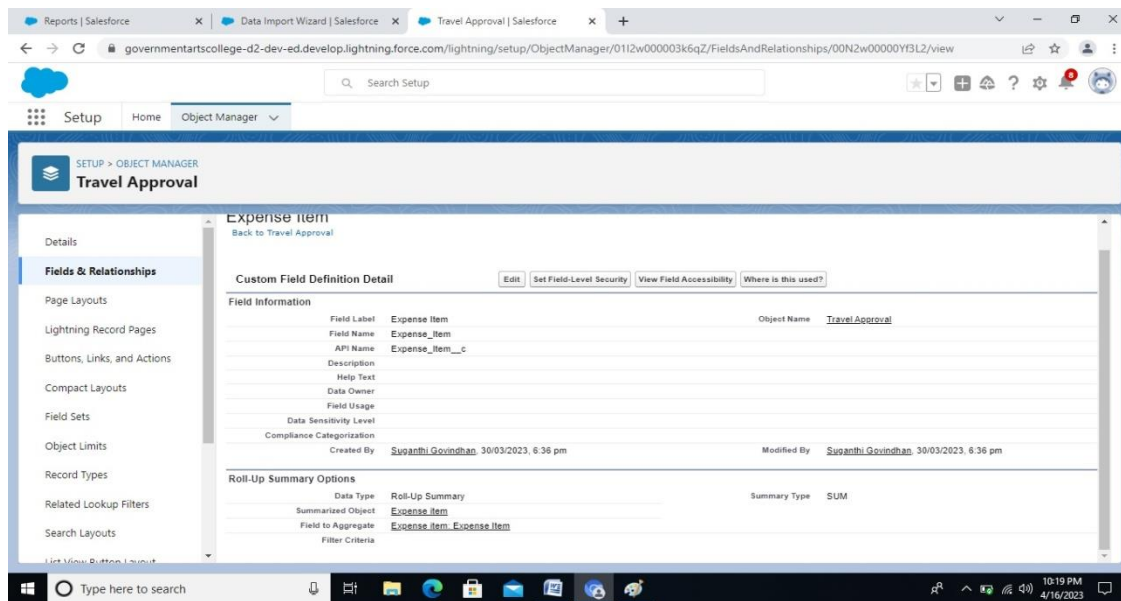
Milestone 7:

Activity 1:

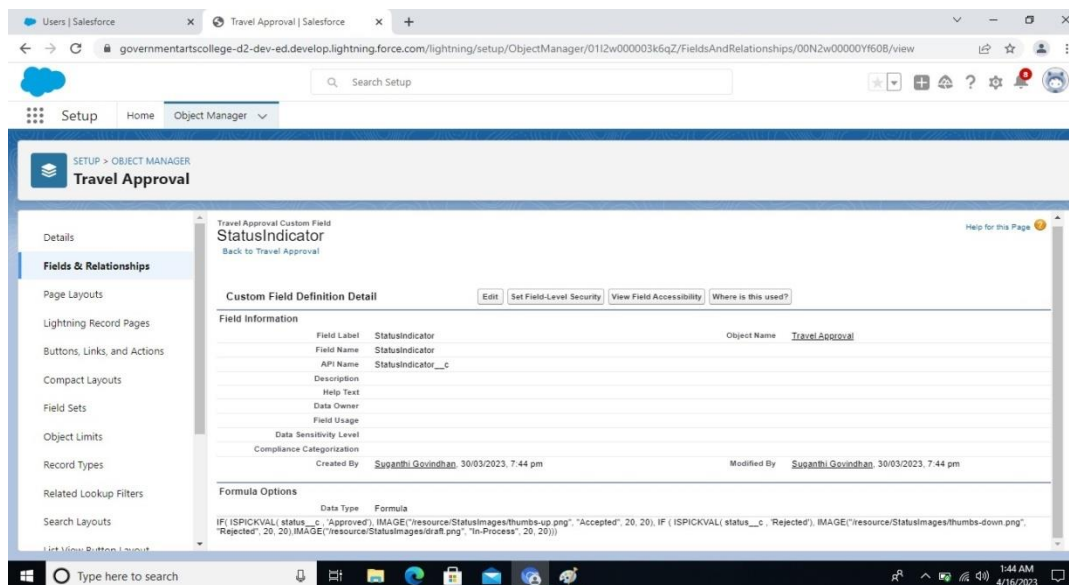


Milestone 8:

Activity 1:

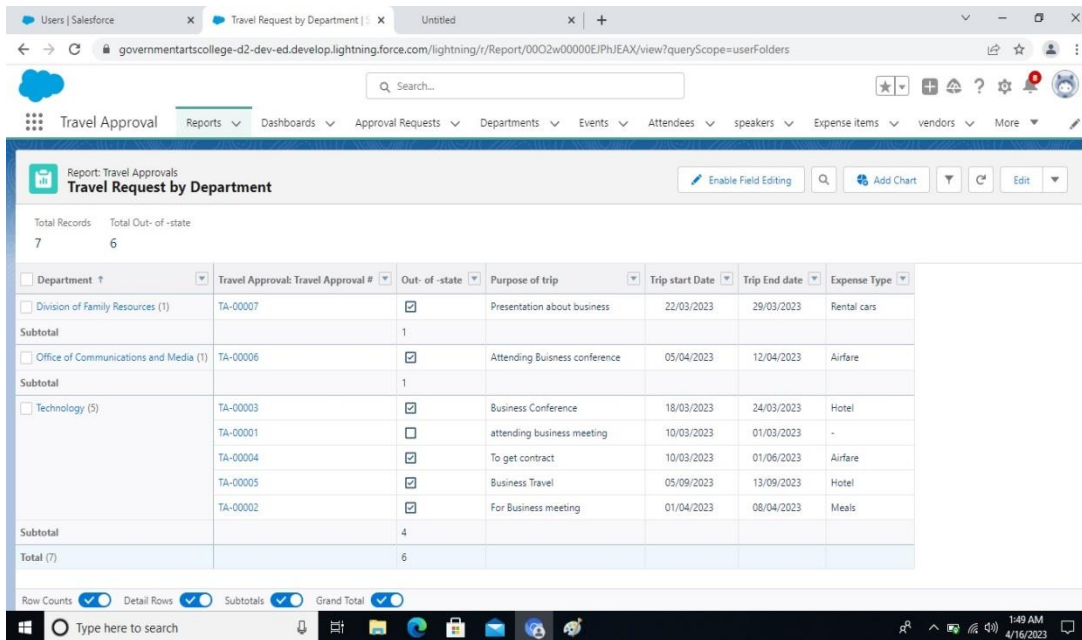


Activity 2:



Milestone 10:

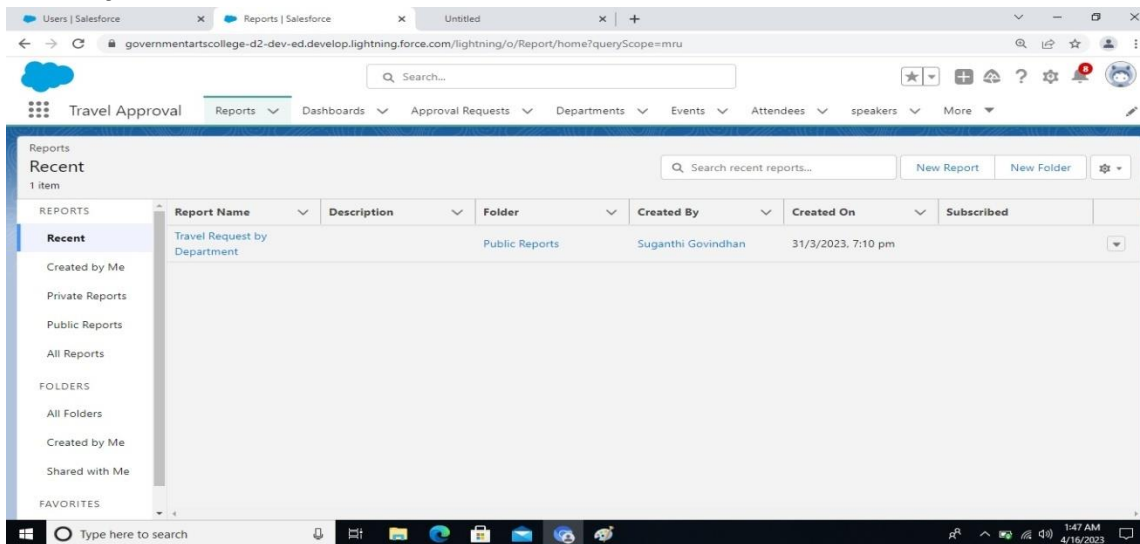
Activiyt 1:



The screenshot shows a Salesforce report titled "Travel Request by Department". The report is filtered by "Department" and "Out-of-state". The data is organized into a table with columns for Department, Travel Approval #, Out-of-state status, Purpose of trip, Trip start Date, Trip End date, and Expense Type. The report shows 7 total records and 6 out-of-state records. The data is grouped by Department: Division of Family Resources (1), Office of Communications and Media (1), and Technology (5). Each group has a subtotal row. The report also includes a "Row Counts" section at the bottom with checkboxes for "Detail Rows", "Subtotals", and "Grand Total".

Department	Travel Approval #	Out-of-state	Purpose of trip	Trip start Date	Trip End date	Expense Type
Division of Family Resources (1)	TA-00007	<input checked="" type="checkbox"/>	Presentation about business	22/03/2023	29/03/2023	Rental cars
Subtotal		1				
Office of Communications and Media (1)	TA-00006	<input checked="" type="checkbox"/>	Attending Business conference	05/04/2023	12/04/2023	Airfare
Subtotal		1				
Technology (5)	TA-00003	<input checked="" type="checkbox"/>	Business Conference	18/03/2023	24/03/2023	Hotel
	TA-00001	<input type="checkbox"/>	attending business meeting	10/03/2023	01/03/2023	-
	TA-00004	<input checked="" type="checkbox"/>	To get contract	10/03/2023	01/06/2023	Airfare
	TA-00005	<input checked="" type="checkbox"/>	Business Travel	05/09/2023	13/09/2023	Hotel
	TA-00002	<input checked="" type="checkbox"/>	For Business meeting	01/04/2023	08/04/2023	Meals
Subtotal		4				
Total (7)		6				

Activity 2:

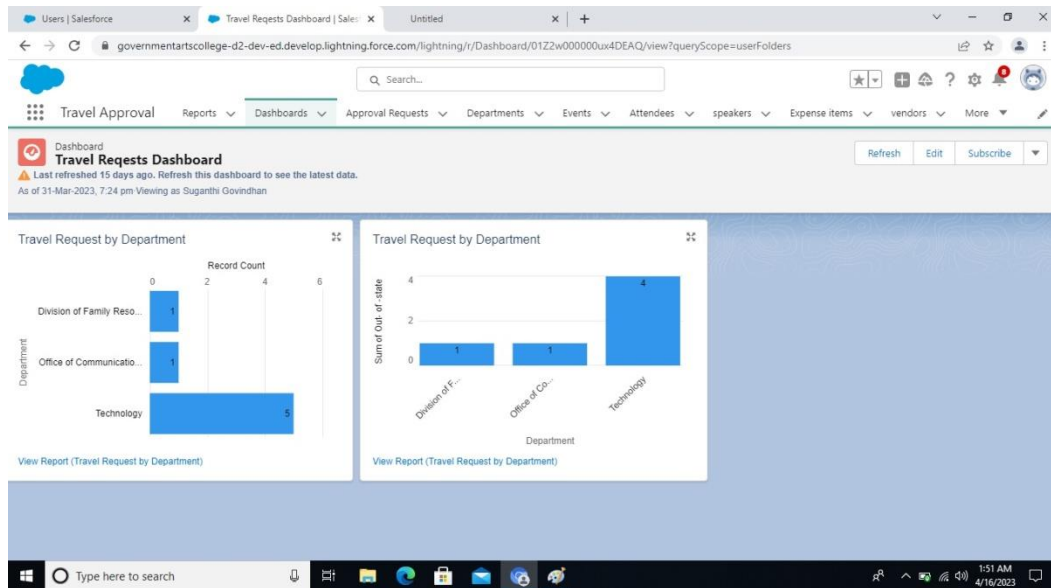


The screenshot shows the Salesforce Reports page. The "Recent" section displays a list of reports. The report "Travel Request by Department" is listed with a description of "Public Reports", created by "Suganthi Govindhan", and created on "31/3/2023, 7:10 pm". The report is also listed under the "FOLDERS" section with a description of "All Folders".

Report Name	Description	Folder	Created By	Created On	Subscribed
Travel Request by Department	Public Reports	Public Reports	Suganthi Govindhan	31/3/2023, 7:10 pm	

Milestone 11:

Activity 1:



4. Trailhead Profile Public URL:

Team Lead:(G. Suganthi) - <https://trailblazer.me/id/sgovindhan1>

Team member 1: (T. Sakthipriya) - <https://trailblazer.me/id/saktt4>

Team member 2:(T.R. Sowndharya)

<http://trailblazer.me/id/sowtr1>

Team member 3:(T. Nandhitha) -

<https://trailblazer.me/id/vnandhu1>

5. Advantages and disadvantages

Advantages:

- Approval on time
- Customized approval workflows
- Increased compliance and reduced costs
- Faster processing time

Disadvantages

- It isn't easy to manage expenses with a traditional expense approval process where spreadsheets and emails are used
- Things are slow in manual expense approval process
- Without proper approval and planning, there are chances for last minute chaos
- Without a travel approval workflow, you have no control over costs and could overshoot the budget

6.Applications

- Purpose of Travel
- Destination
- Duration of the stay
- Total expenditure involved in the trip
- Mention our details in the comments, such as expenses incurred by a team member who joined you on the trip

7. conclusion

A travel request app helps gather employee trip details and allows you to reject or approve their travel and reimburse their expenses.

8. Future Goals

Your employees travel request management with automated software can streamline process, and with such as modernized process, annual forecasting of spends on traveling can also be

managed. After analyzing yearly travel requests, the mamagement team can actual travel requirements.