

# PROJECT REPORT ON

## BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATIONS FOR CORPORATES

### • INTRODUCTION

#### 1.1 Overview

The Employee Travel Approval Application is a system developed using Salesforce that automates the travel approval process for employees in corporate organizations. The system provides a streamlined and efficient method for employees to submit their travel requests and for managers to approve or reject those requests.

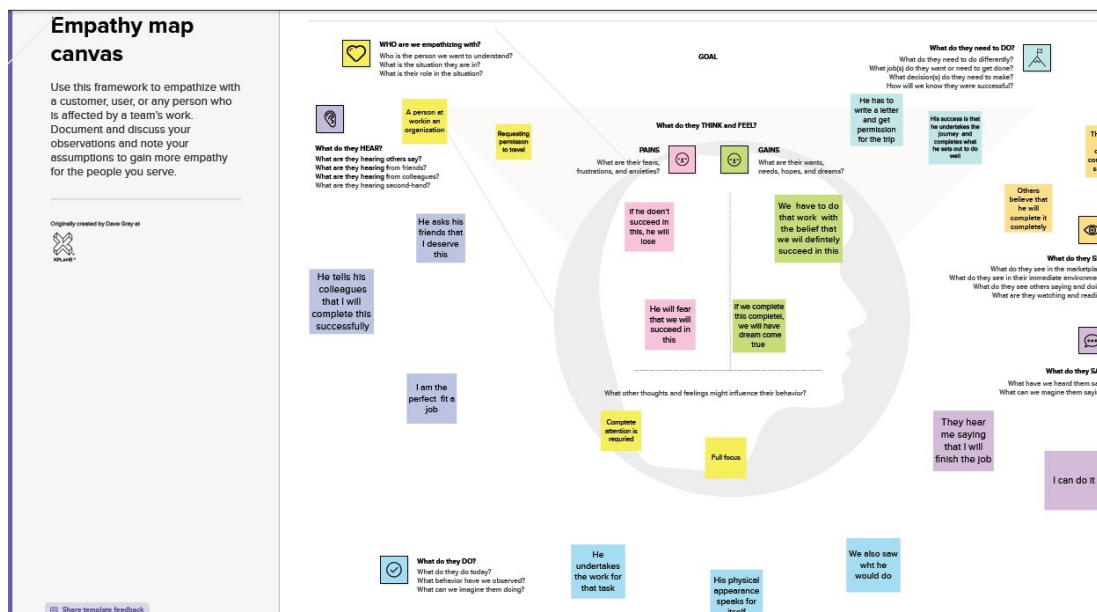
#### 1.2 Purpose

The primary purpose of this project is to provide a digital solution to the manual and paper-based travel approval process for corporate organizations. The Employee Travel Approval Application automates the process of travel request submission, approval, and tracking, enabling employees and managers to manage the process more efficiently.

### • PROBLEM DEFINITION & DESIGN THINKING

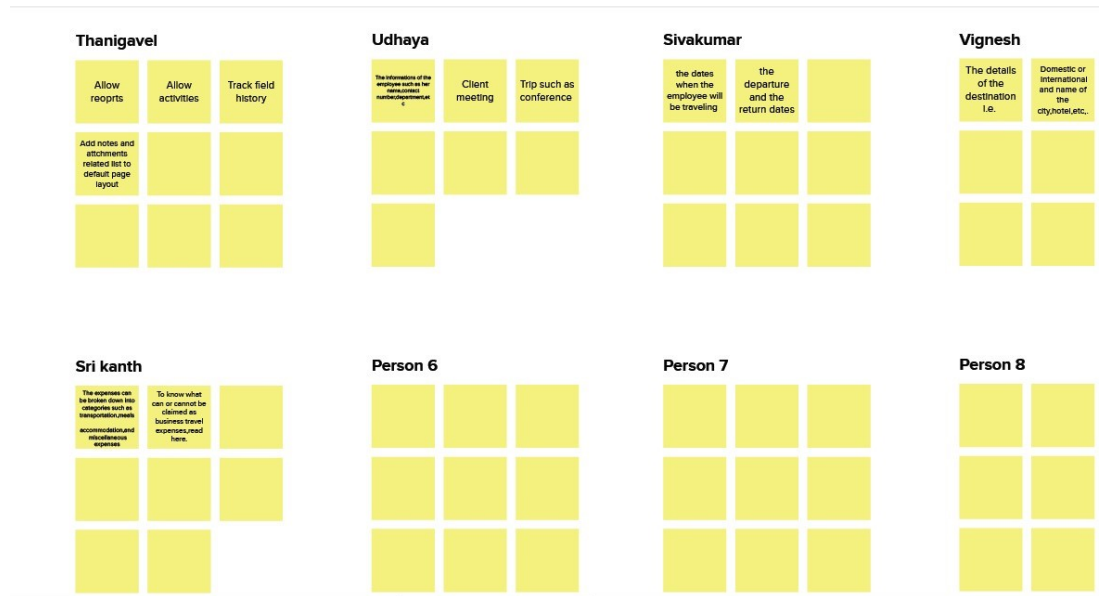
#### 2.1 Empathy Map

(Paste the empathy map screenshot)



## 2.2 Ideation & Brainstorming Map

(Paste the Ideation & brainstorming map screenshot)



## • RESULT

### 3.1 Data Model:

Object name	Fields in the Object	
Object 1	Field label	Data type
	Travel Approval	Currency
	Expense	Picklist
Object 2	Field label	Data type
	Travel Apprval	Master-Detail relationship

### 3.2 Activity and Screenshot

## Milestone 1

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar and navigation tabs for Setup, Home, and Object Manager. The main content area is titled 'New Custom Object' under the 'SETUP' header. A yellow banner at the top of the main area states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'. Below this is the 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Information' section includes fields for 'Label' (travel approval), 'Plural Label' (travel approvals), 'Starts with vowel sound' (unchecked), 'Object Name' (travel\_approval), and a 'Description' text area. A 'Context-Sensitive Help Setting' is at the bottom with two radio buttons: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'.

## Milestone 2

The screenshot shows the Salesforce Setup interface with a browser window open. The browser address bar shows a URL from 'governmentartcollegeform54-dev-ed.develop.lightning.force.com'. The Setup page is titled 'Tabs' under the 'SETUP' header. A left sidebar shows a search for 'tabs' and a list of options under 'User Interface', with 'Rename Tabs and Labels' and 'Tabs' visible. The main content area is 'Step 1. Enter the Details' for creating a new custom tab. It prompts the user to 'Choose the custom object for this new custom tab. Fill in other details.' and includes a dropdown for 'Object' (travel approval), a 'Tab Style' selector (Apple), an optional 'Splash Page Custom Link' dropdown (None), and a 'Description' text area. 'Next' and 'Cancel' buttons are at the bottom right.

## Milestone 3

travel approval | Salesforce | Home | Salesforce | Object creator | Home | Salesforce

governmentartscollegeform54-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i000000frKJ/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
travel approval

Step 2. Enter the details Step 2 of 4

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

Field Label: travel approval

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 16

Decimal Places: 2

Field Name: travel\_approval

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

## Milestone 4

travel approval | Sales | Home | Salesforce | Object creator | Home | Salesforce | WhatsApp | 05 Build\_a\_Employee |

governmentartscollegeform54-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i000000frKJ/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
travel approval

travel approval  
New Relationship

Step 6. Add custom related lists Step 6 of 6

Field Label: Account

Data Type: Master-Detail

Field Name: Account

Description:

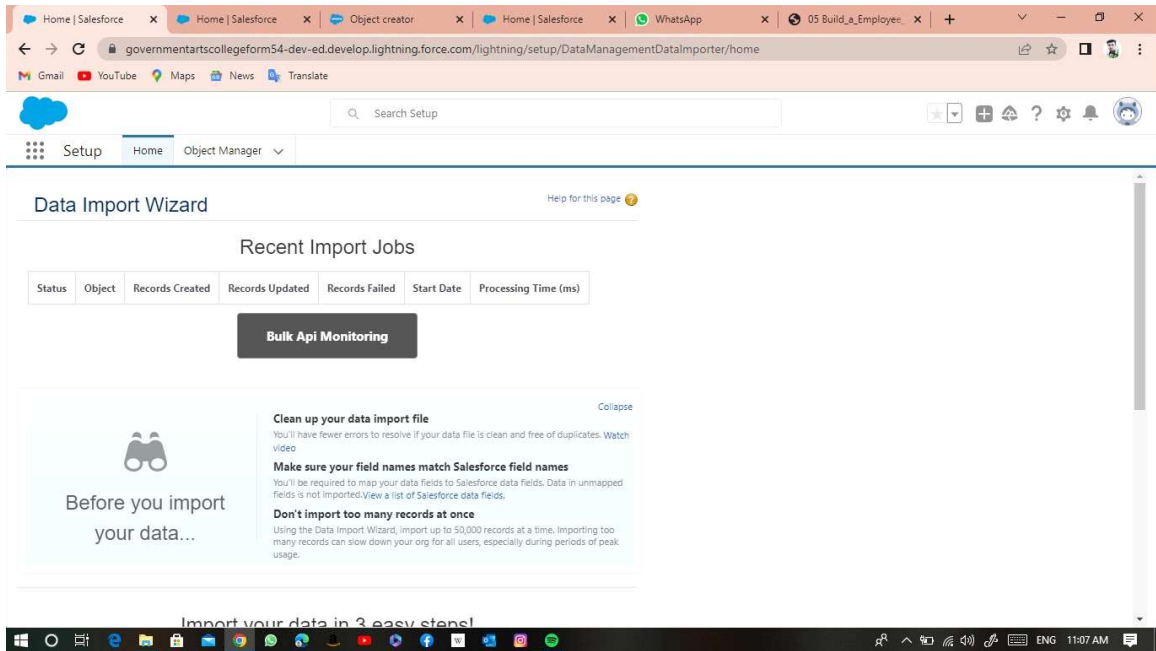
Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label: travel approvals

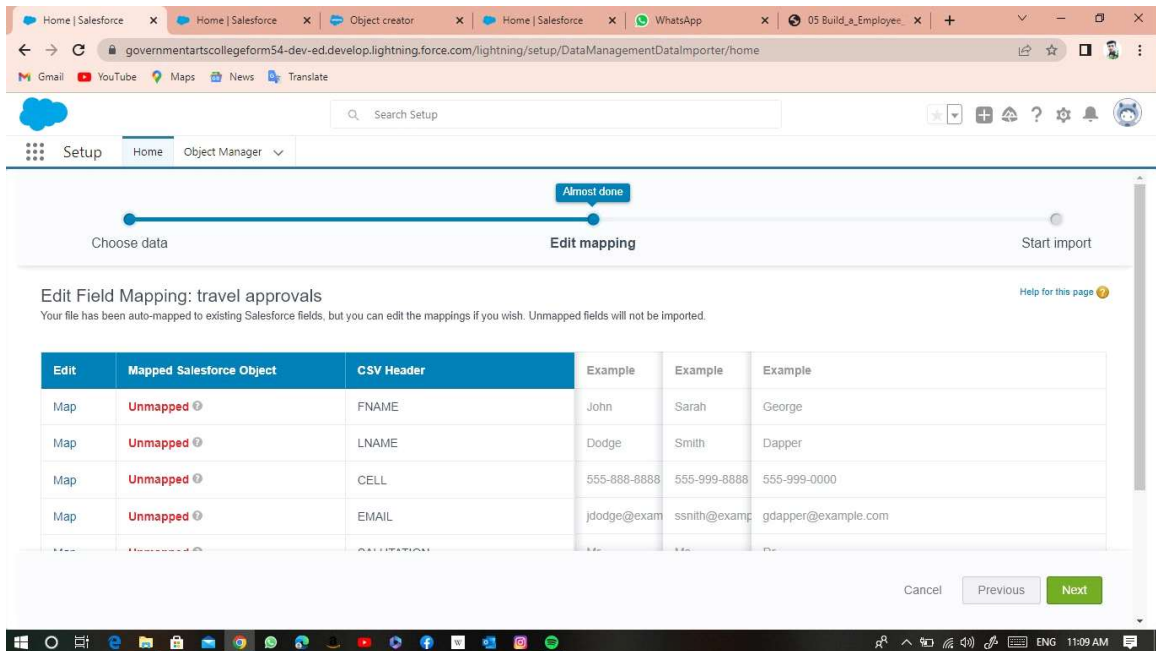
These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	Account (Marketing) Layout
<input checked="" type="checkbox"/>	Account (Sales) Layout
<input checked="" type="checkbox"/>	Account (Support) Layout
<input type="checkbox"/>	Account Layout

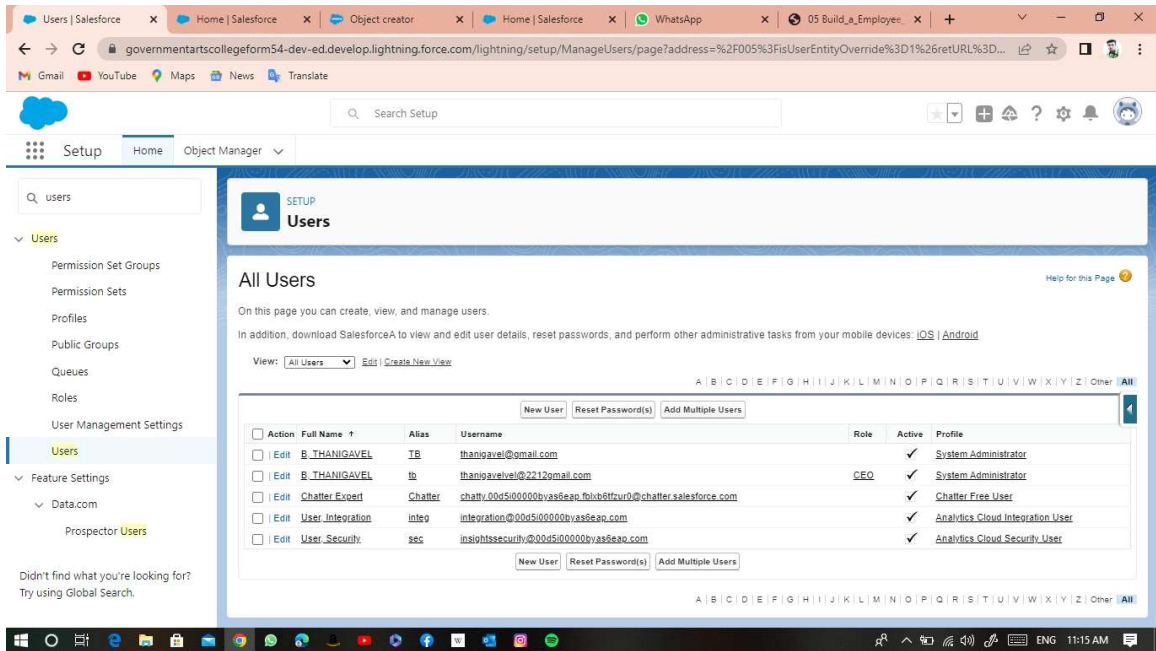
## Milestone 5



## Milestone 6



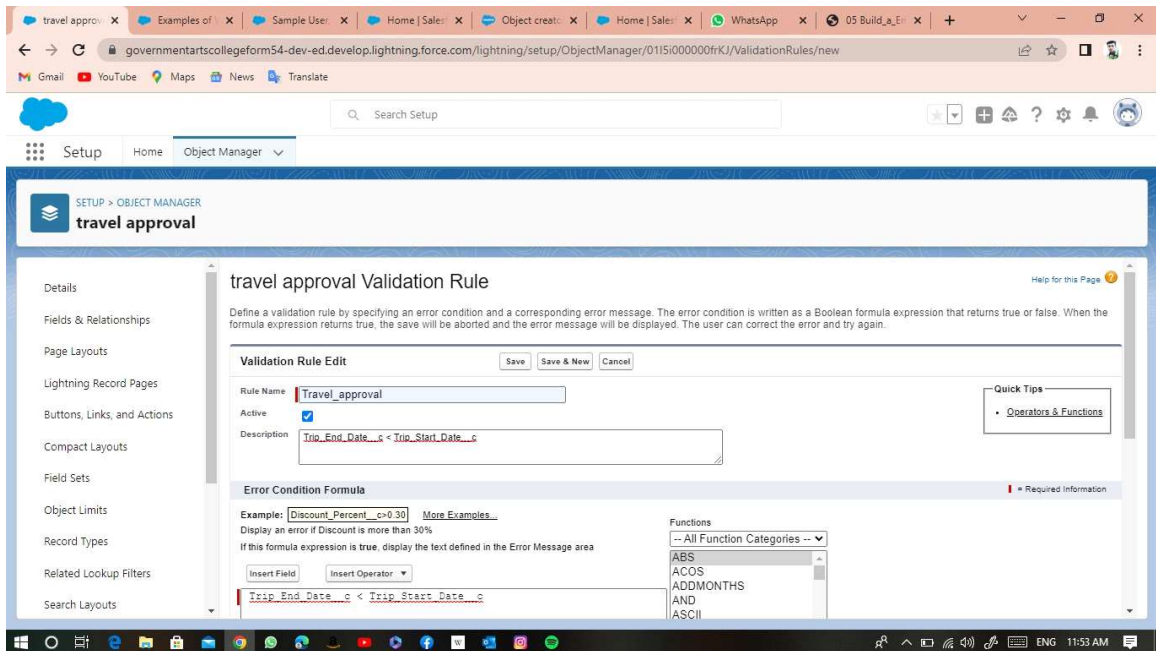
## Milestone 7



The screenshot shows the Salesforce Setup interface with the 'Users' section selected in the left sidebar. The main content area is titled 'All Users' and includes a search bar and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The following table represents the data shown in the screenshot:

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	B. THANIGAVEL	TB	thanigavel@gmail.com		✓	System Administrator
<a href="#">Edit</a>	B. THANIGAVEL	Tb	thanigavel@2212@gmail.com	CEO	✓	System Administrator
<a href="#">Edit</a>	Chatter Expert	Chatter	chatter.00050000000000000000000000000000@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	User Integration	Integ	integration@00050000000000000000000000000000@salesforce.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	security@00050000000000000000000000000000@salesforce.com		✓	Analytics Cloud Security User

## Milestone 8



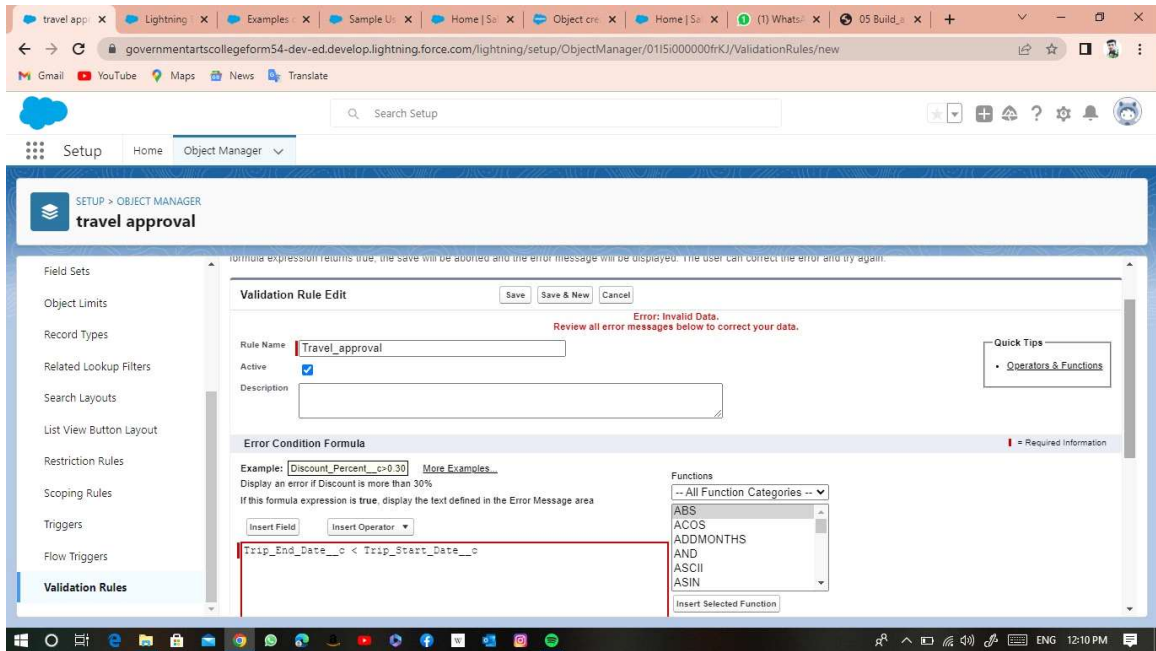
The screenshot shows the Salesforce Setup interface with the 'Validation Rules' section selected in the left sidebar. The main content area is titled 'travel approval Validation Rule' and includes a 'Validation Rule Edit' form. The form has the following fields:

- Rule Name:** Travel\_approval
- Active:** ☒
- Description:** Trip\_End\_Date\_\_c < Trip\_Start\_Date\_\_c
- Error Condition Formula:** Trip\_End\_Date\_\_c < Trip\_Start\_Date\_\_c

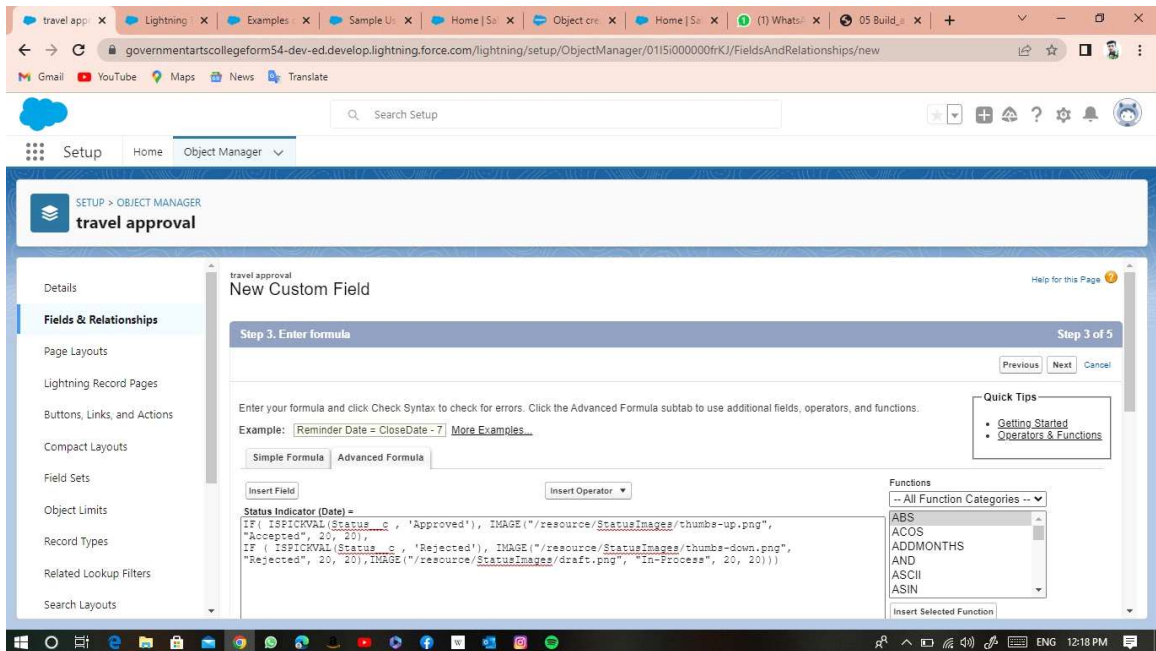
The 'Error Condition Formula' section includes an example: `Discount_Percent__c > 0.30` and a note: 'Display an error if Discount is more than 30%. If this formula expression is true, display the text defined in the Error Message area.' The 'Functions' list on the right includes ABS, ACOS, ADDMONTHS, AND, and ASCII.

## Milestone 9





## Milestone 10



- **TRAILHEAD PROFILE PUBLIC URL**

Team Lead – <https://trailblazer.me/id/thanb10>

Team member 1 - <https://trailblazer.me/id/sivas308>

Team member 2 - <https://trailblazer.me/id/uthat2>

Team member 3 - <https://trailblazer.me/id/vigat>

- 

- **ADVANTAGES AND DISADVANTAGES**

(List of advantages and disadvantages of the proposed solution)

Increased efficiency: The system streamlines the travel approval process, reducing the time and resources required for manual processing and communication.

Real-time updates: The system provides real-time updates on the status of the travel approval request, enabling employees to respond quickly to any updates or changes in the process.

Customizable and flexible: The system can be customized to meet the specific needs of different corporate organizations, providing a tailored solution to meet their travel request requirements.

Improved visibility: The system provides a centralized location for storing and managing travel request information, enabling managers to track employee travel activities more easily.

Disadvantages:

Technical complexity: Implementing a CRM system requires technical expertise and ongoing maintenance, which can be a challenge for some users.

Cost: Developing and implementing a CRM system can be expensive, requiring resources for software development, hardware, and technical support.

User adoption: Some users may be resistant to using a new system, which could affect user adoption rates.



- **APPLICATIONS**

(The areas where this solution can be applied)

The Employee Travel Approval Application has applications for various users, including employees, managers, and corporate travel coordinators. The system can be used by employees to submit their travel requests, enabling them to track the status of their requests. Managers can use the system to approve or reject travel requests and monitor travel activities, while corporate travel coordinators can use the system to manage travel bookings and expenses.

- **CONCLUSION**

(Conclusion summarizing the entire work and findings)

In conclusion, the Employee Travel Approval Application is a valuable tool for corporate organizations seeking to streamline and automate their travel approval process. While there are potential drawbacks, such as cost and technical complexity, the advantages of the system, such as increased efficiency, real-time updates, customization, and improved visibility, outweigh the disadvantages. Overall, the system is an effective solution for managing employee travel activities in corporate organizations.

- **FUTURE SCOPE**

(Enhancements that can be made in the future)

The future scope of this project is significant, with potential enhancements and features that could be added to the system, such as:

Integration with travel booking systems: The system could be developed to integrate with travel booking systems, enabling employees to book their travel directly through the system.

Integration with expense management systems: The system could be developed to integrate with expense management systems, enabling employees to submit their expenses directly through the system.

Mobile application: A mobile application could be developed to complement the web-based system, providing employees with on-the-go access to their travel request information.

Machine learning capabilities: The system could be developed to include machine learning capabilities, such as predictive analytics, to provide insights on employee

travel trends.

Integration with safety and security systems: The system could be enhanced to integrate with safety and security systems, providing a more secure and efficient travel request process.