

BUILD A EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

1. INTRODUCTION

1.1 Overview

Travel approval is allows to request and approve business trips. It was a approval of official travel in advance by an appropriately delegated officer, utilizing the appropriate form or system.

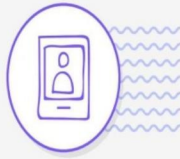
1.2 Purpose

The main objective of pre-trip approval is to control undesirable travel buying behaviors of employees and cost. The approver verifies the travel approval for the policy of the corporate and decides to approve or decline.

The application is designed to give management an overview of the intended business trip from both a cost and strategic point of view.

2. Problem Definition & Design Thinking

2.1Empathy 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.

[Share template feedback](#)



Build empathy

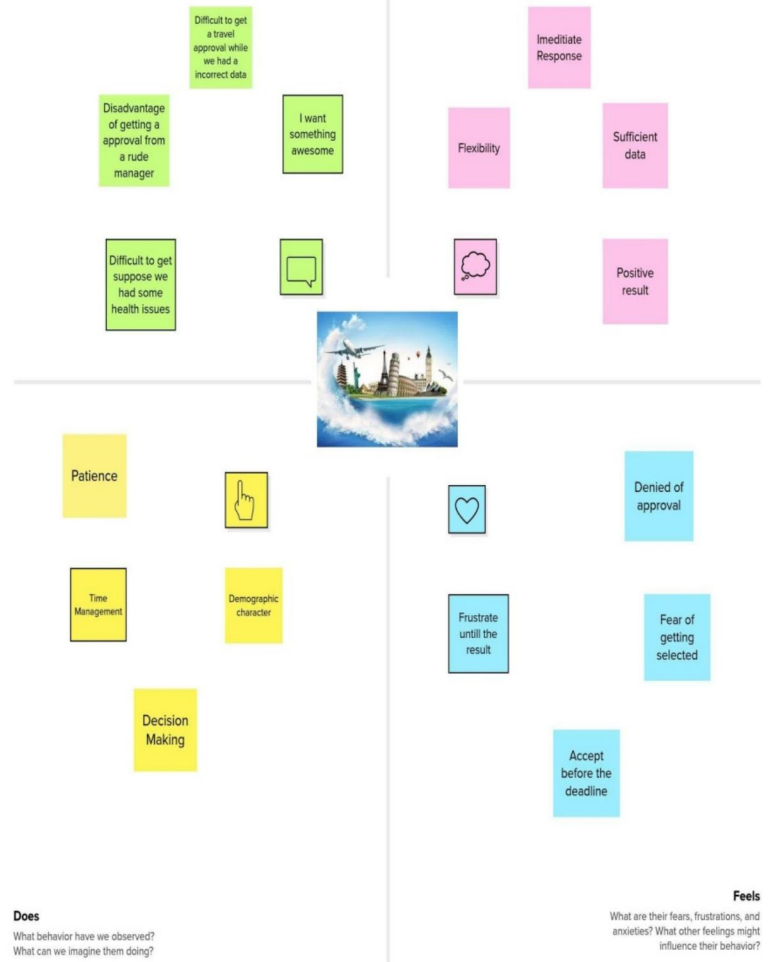
The information you add here should be representative of the observations and research you've done about your users.

Says

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

Thinks

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



Does

What behavior have we observed?
What can we imagine them doing?

Feels

What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?

2.2 Ideation & Brainstorming Map

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



Key rules of brainstorming

To run an 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

Prince X

flexibility for employee's rules

proposed informations are destination

priority alertment

avoid misunderstanding rules

Sangarammal A

maintaining receipts

multilevel approvals and notifications

travel request form in soft copy

automation and integration

Sathya K

travel and expense workflow

Ensure employees safety

request for knowledge management

faster processing and reduce costs

Udhaya Pon Aishwarya M

Gather employee trip details

Records prepared in audits

Advanced digital system

customized approval workflows

Activate Windows
Go to Settings to activate Windows.



3. DATA MODEL

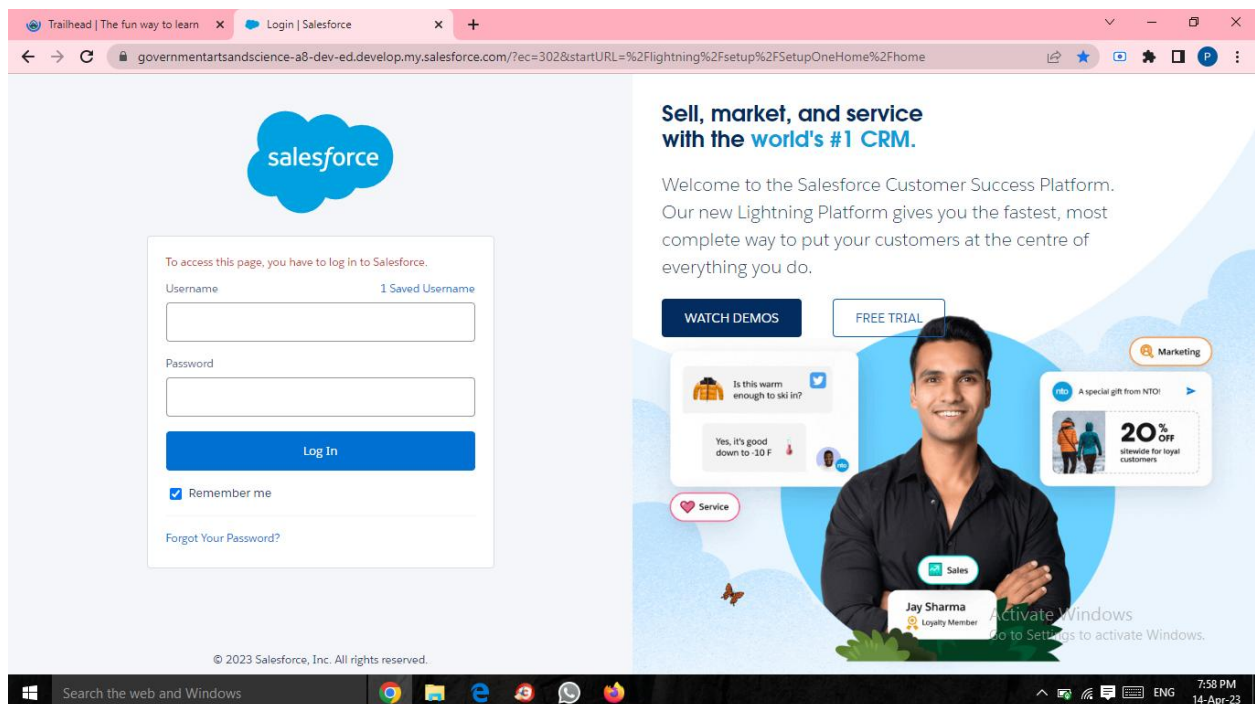
Object Name	Fields in the object		
Department	Field label	Data Type	
	Department Code	Text	
	Department Name	Text	
Travel Approval	Field label	Data Type	
	Travel Approval	Master Detail Relationship	
	Department	Lookup	
	Destination State	Text	
	Out of State	Checkbox	
	Purpose of Trip	Text Area	
	Status	Picklist	
	Trip Start Date	Date	
	Trip End Date	Date	

Expense Item	Field label	Data Type	
	Expense Item No	Auto Number	
	Expense Type	Picklist	
	Amount	Currency	

3.2 Activity & Screenshot

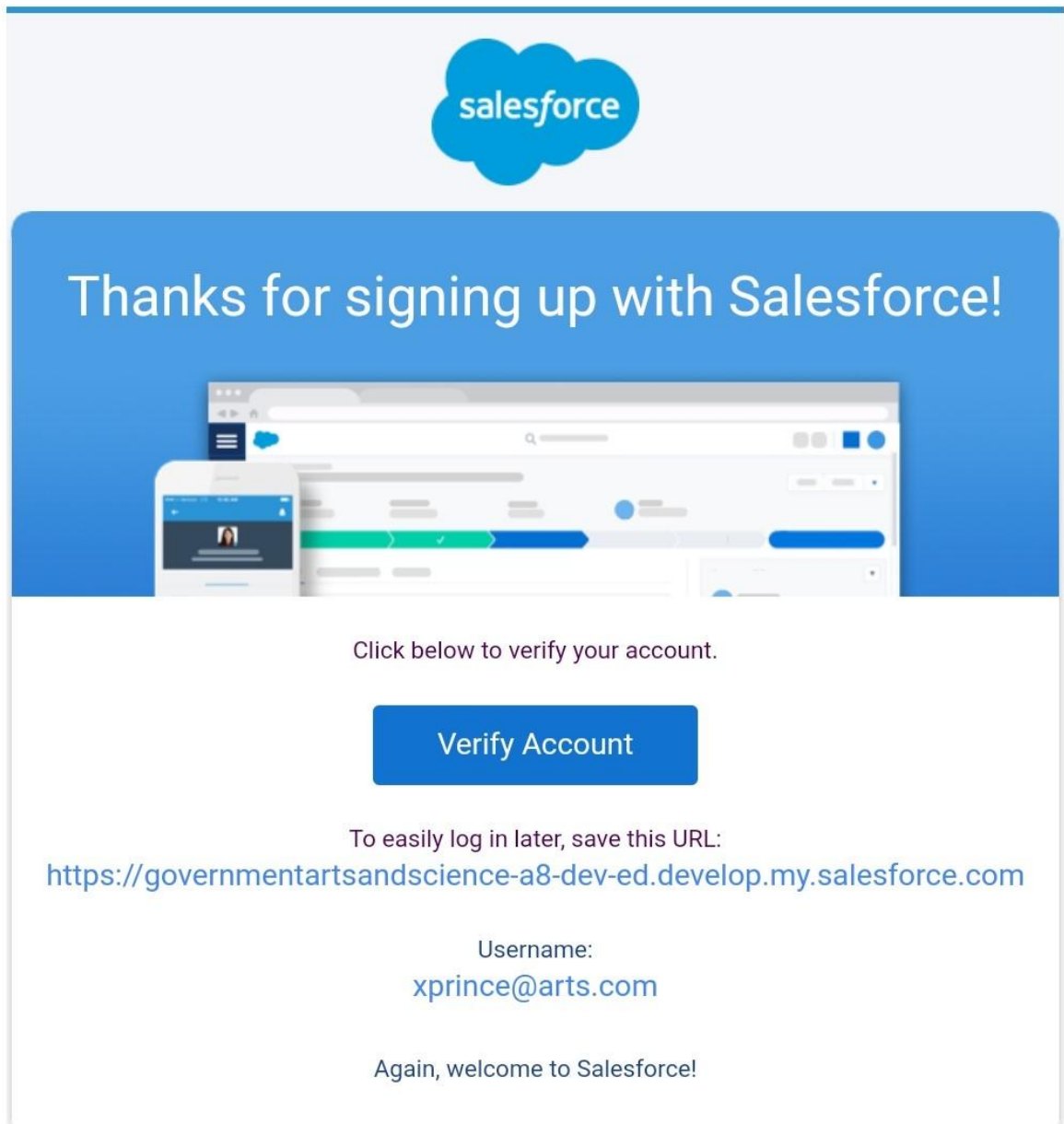
CREATING AN SALESFORCE ACCOUNT

We went to the website developers.salesforce.com and signed up by giving our details. LOGIN TO SALESFORCE ACCOUNT we gave our username and password which we created in the last step and logged in into the salesforce account.





developer@salesfor... 3 days ago
to me ▾



Account Activation for salesforce account and log in process

CREATING THE TRAVEL APPROVAL APPLICATION

In the quick find box we typed app manage and went inside it and new lightning app and created a travel approval application by giving the details.

Setup Home

Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
[Get Started](#)

Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
[Learn More](#)

Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
[Get Started](#)

Most Recently Used
10 items






NAME	TYPE	OBJECT
Amount	Custom Field Definition	Expense Item
Expense Item	Custom Object Definition	
TravelApproval	Custom Field Definition	Expense Item
Expense Type	Custom Field Definition	Expense Item
TravelApproval	Custom Field Definition	TravelApproval
Out-of-State	Custom Field Definition	TravelApproval
Trip End Date	Custom Field Definition	TravelApproval
Status	Custom Field Definition	TravelApproval
Purpose of Trip	Custom Field Definition	TravelApproval
Trip Start Date	Custom Field Definition	TravelApproval








The home page for the setup page is a first step for the app creation.

OBJECT CREATION

For this travel approval app, we created three objects namely

- Department
- Travel approval
- Expense Item

 **Department | Salesfor...** 




Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

 **Department**

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

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Field

Quick Find

5 Items, sorted by Field Label

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)		✓

✕ All | Departments | Sal...
-ed.develop.lightning.force.com

Q Search...

Travel Approval Reports Dashboards Departments TravelApprovals Expense Items More

Departments
All

16 items • Sorted by Department Name • Filtered by All departments • Updated a few seconds ago

Q Search this list...

<input type="checkbox"/>	Department Name ↑
1	<input type="checkbox"/> Audit Services
2	<input type="checkbox"/> Contract Management
3	<input type="checkbox"/> Disability Determination Bureau
4	<input type="checkbox"/> Division of Aging
5	<input type="checkbox"/> Division of Disability and Rehabilitative Services
6	<input type="checkbox"/> Division of Family Resources
7	<input type="checkbox"/> Division of Finance
8	<input type="checkbox"/> Division of Mental Health and Addiction
9	<input type="checkbox"/> Human Resources
10	<input type="checkbox"/> Legislative Services
11	<input type="checkbox"/> Office of Communications and Media
12	<input type="checkbox"/> Office of Early Childhood and Out-of-School Learning
13	<input type="checkbox"/> Office of General Counsel
14	<input type="checkbox"/> Office of Medicaid Policy and Planning
15	<input type="checkbox"/> Quality and Compliance Office
16	<input type="checkbox"/> Technology

The Department object and fields are using enter the department code and department name.

- Travel approval object is used for purpose of the travel and details.



Search Setup



Setup

Home

Object Manager



SETUP > OBJECT MANAGER

TravelApproval

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Record Types

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List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Field

13 Items, Sorted by Field Label

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		▼
Purpose of Trip	Purpose_of_Trip__c	Text Area(255)		▼
Status	Status__c	Picklist		▼
Status Indicator	StatusIndicator__c	Formula (Text)		▼
Total Expenses	Total_Expenses__c	Roll-Up Summary (SUM Expense Item)		▼
Travel Approval #	Name	Auto Number	✓	▼
TravelApproval	TravelApprovals__c	Master-Detail(TravelApprovals)	✓	▼
Trip End Date	Trip_End_Date__c	Date		▼
Trip Start Date	Trip_Start_Date__c	Date		▼

Travel approval fields

SETUP > OBJECT MANAGER
TravelApproval

Details

Fields & Relationships

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Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

TravelApproval Layout

Custom Console Components Mini Page Layout Mini Console View Video Tutorial Help for this Page

Save

Quick Save

Preview As...

Cancel

Undo

Redo

Layout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning

Actions

Expanded Lookups

Related Lists

Quick Find Field Name

Section

Destination State

Status

Travel Approval #

Blank Space

Last Modified By

Status Indicator

Trip End Date

Created By

Out-of-State

Total Expenses

Trip Start Date

Department

Purpose of Trip

TravelApproval

TravelApproval Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce

Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning

Experience Actions

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

TravelApproval Detail

Standard Buttons

Edit

Delete

Clone

Change Owner

Change Record Type

Printable View

Custom Buttons

Information (Header visible on edit only)

Travel Approval # GEN-2004-001234

TravelApproval Sample Text

Status Sample Text

Total Expenses ₹123.45

Status Indicator Sample Text

Trip Info

Purpose of Trip Sample Text

Trip End Date 11/04/2023

Trip Start Date 11/04/2023

Destination State Sample Text

Out-of-State ✓

Department Sample Text

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.

Related Lists

Travel Approval Layout for the travel object

TAB CREATION

In the quick find box we typed tabs and went inside it and clicked new and we gave the required details to create custom tabs.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with a close icon, a lock icon, the text "Tabs | Salesforce", the URL "ed.develop.lightning.force.com", a share icon, a bookmark icon, and a menu icon. Below this is a search bar with the text "Search Setup". The main navigation area includes "Setup", "Home", and "Object Manager". The left sidebar shows a search for "Tab" and a list of items under "User Interface": "Loaded Console Tab Limit", "Rename Tabs and Labels", and "Tabs" (which is highlighted). Below the sidebar, a message says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Custom Tabs" and includes a "Help for this Page" link. The text explains that custom tabs can be created to extend Salesforce functionality. It then lists four types of custom tabs: Custom Object Tabs, Web Tabs, Visualforce Tabs, and Lightning Component Tabs. Each type has a "New" button and a "What Is This?" link. The "Custom Object Tabs" section shows a table with four entries: "Departments" (Books style), "Expense Items" (Handsaw style), "TravelApprovals" (Airplane style), and "Travel Approvals" (Box style). The other three sections (Web Tabs, Visualforce Tabs, and Lightning Component Tabs) all show "No [type] Tabs have been defined".

× **Tabs | Salesforce** ed.develop.lightning.force.com

Search Setup

Setup Home Object Manager

Q Tab

User Interface

- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs**

Didn't find what you're looking for? Try using Global Search.

Custom Tabs

Help for this Page

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	Departments	Books	
Edit Del	Expense Items	Handsaw	
Edit Del	TravelApprovals	Airplane	
Edit Del	Travel Approvals	Box	

Web Tabs New What Is This?

No Web Tabs have been defined

Visualforce Tabs New What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs New What Is This?

No Lightning component tabs have been defined

Lightning Page Tabs New What Is This?

No Lightning Page Tabs have been defined



[Travel Approval](#)
[Reports](#)
[Dashboards](#)
[Departments](#)
[TravelApprovals](#)
[Travel Approvals](#)
[More](#)

	Travel Approvals	All Records	New	Change Owner	Import	Printable View		
100+ items • Sorted by Travel Approvals • Filtered by All travel approvals • Updated a few seconds ago	Search this list...							
	Travel Approvals ↑	Department	De...	Purpose of Trip	Trip Sta...	Trip E...	Stat...	
1	a082w00000eOA4a	Legislative Servic...	OK	Kautzer, Fisher an...	07/04/2...	14/04...	App...	
2	a082w00000eOA...	Contract Manage...	FL	Kerluke, Watsica ...	08/05/2...	14/05...	App...	
3	a082w00000eOA4c	Division of Disabil...	FL	Wintheiser-DuBuq...	06/11/2...	12/11...	App...	
4	a082w00000eOA...	Audit Services	TX	Keeling-Raynor	28/02/2...	06/03...	App...	
5	a082w00000eOA4e	Disability Determi...	OK	Weber-Herman	06/03/2...	07/03...	Rej...	
6	a082w00000eOA4f	Office of Commun...	CA	Wolff-Schumm	09/07/2...	13/07...	App...	
7	a082w00000eOA...	Legislative Servic...	OK	Sauer, Franecki an...	14/06/2...	26/06...	Rej...	
8	a082w00000eOA4h	Office of Commun...	FL	Streich LLC	12/01/2...	19/01...	Rej...	
9	a082w00000eOA4i	Legislative Servic...	GA	Klocko, Gutkowsk...	19/09/2...	21/09...	App...	
10	a082w00000eOA4j	Contract Manage...	OK	Ward Group	11/05/2...	11/05...	App...	
11	a082w00000eOA4k	Human Resources	FL	Purdy, Halvorsen ...	30/07/2...	30/07...	App...	
12	a082w00000eOA4L	Office of Commun...	FL	White-Kutch	14/06/2...	15/06...	App...	
13	a082w00000eOA4I	Legislative Servic...	CA	Wiza Group	27/02/2...	01/03...	App...	
14	a082w00000eOA...	Disability Determi...	OK	Runolfsson, Bogis...	01/10/2...	01/10...	App...	
15	a082w00000eOA...	Human Resources	GA	Fadel, Bradtke an...	30/11/2...	05/12...	App...	
16	a082w00000eOA...	Division of Disabil...	OK	Homenick, Waters...	03/04/2...	06/04...	Rej...	
17	a082w00000eOA4n	Office of Commun...	CA	Crooks-Connelly	19/08/2...	18/08...	App...	
18	a082w00000eOA...	Technology	FL	Schoen, Mitchell a...	13/03/2...	20/03...	App...	
19	a082w00000eOA...	Division of Disabil...	OK	Herzog Group	23/01/2...	26/01...	App...	
20	a082w00000eOA...	Human Resources	FL	Senger-Schumm	27/04/2...	05/05...	App...	
21	a082w00000eOA...	Technology	TX	Hegmann and Sons	10/04/2...	14/04...	Rej...	
22	a082w00000eOA...	Division of Finance	CA	Abernathy, Beatty ...	09/03/2...	09/03...	Rej...	
23	a082w00000eOA...	Office of Commun...	FL	Bashirian and Sons	30/05/2...	30/05...	App...	
24	a082w00000eOA...	Contract Manage...	TX	Mertz-Mertz	22/12/2...	01/01...	App...	
25	a082w00000eOA4r	Division of Disabil...	GA	Dicki-Rath	07/07/2...	07/07...	App...	
26	a082w00000eOA...	Division of Aging	OK	Tromp Group	23/04/2...	28/04...	App...	
27	a082w00000eOA4s	Division of Mental...	GA	Windler Group	15/11/2...	20/11...	App...	
28	a082w00000eOA...	Audit Services	FL	Leuschke-Lakin	09/08/2...	15/08...	Rej...	
29	a082w00000eOA4t	Office of Early Chi...	TX	Satterfield and So...	13/07/2...	19/07...	App...	
30	a082w00000eOA...	Division of Aging	GA	Homenick, Blanda...	05/11/2...	11/11...	App...	
31	a082w00000eOA4u	Division of Mental...	TX	Sanford, Kuhic an...	19/12/2...	19/12...	App...	
32	a082w00000eOA...	Disability Determi...	CA	Weimann, Larson ...	22/03/2...	22/03...	App...	
33	a082w00000eOA4v	Disability Determi...	FL	Mitchell-Gibson	20/10/2...	22/10...	App...	
34	a082w00000eOA...	Technology	TX	Romaguera, Mulle...	06/03/2...	09/03...	App...	
35	a082w00000eOA...	Division of Aging	FL	Altenwerth-Crooks	17/02/2...	20/02...	App...	
36	a082w00000eOA...	Office of General ...	TX	Lehner, Robel and...	21/11/2...	26/11...	App...	
37	a082w00000eOA4x	Technology	CA	Jaskolski-Murray	21/07/2...	31/07...	App...	
38	a082w00000eOA...	Office of Commun...	TX	Hodkiewicz LLC	07/03/2...	19/03...	App...	
39	a082w00000eOA4y	Division of Family ...	GA	Nitzsche, Reichert...	08/09/2...	20/09...	App...	
40	a082w00000eOA...	Division of Aging	FL	Hoeger-Crist	06/08/2...	14/08...	App...	
41	a082w00000eOA4z	Office of Commun...	OK	Jacobi-Ferry	02/06/2...	12/06...	App...	
42	a082w00000eOA...	Technology	FL	Kling Inc	25/04/2...	27/04...	App...	
43	a082w00000eOA...	Technology	FL	Kutch-Ebert	31/07/2...	21/08...	App...	
44	a082w00000eOA...	Division of Aging	GA	Huels-Kihn	05/03/2...	14/03...	App...	
45	a082w00000eOA...	Division of Aging	OK	Spinka Group	24/01/2...	24/01...	App...	
46	a082w00000eOA...	Technology	TX	Kunde, O'Reilly an...	19/11/2...	29/11...	App...	
47	a08							

For the Travel Approval object details

✕

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Expense Item | Salesforce

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ed.develop.lightning.force.com



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🔔



🔍


Search Setup

⋮

Setup

Home

Object Manager



SETUP > OBJECT MANAGER

Expense Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Field

🔍 Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

6 Items, sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(16, 2)		▼
Created By	CreatedBy	Lookup(User)		
Expense Item Number	Name	Auto Number		✓ ▼
Expense Type	Expense_Type__c	Picklist		▼
Last Modified By	LastModifiedById	Lookup(User)		
TravelApproval	TravelApproval__c	Master-Detail(TravelApproval)		✓ ▼

Expense Item Fields and Relationship details

Edit E-00001

Expense Item Number

E-00001

* Amount

₹50.00

* Expense Type

Airfare

TravelApproval

TA-00001

Created By

Prince X, 06/04/2023, 7:15 am

Last Modified By

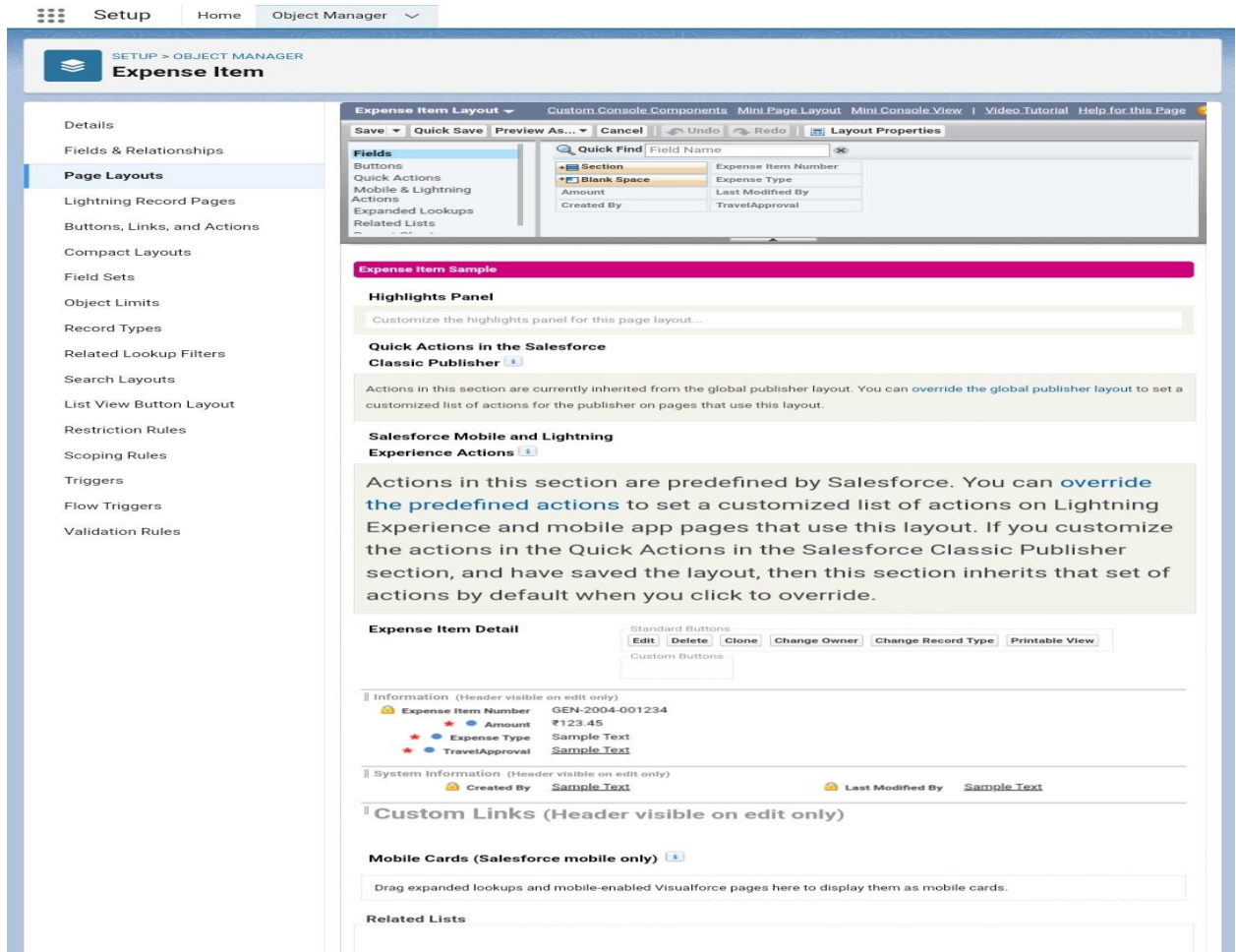
Prince X, 11/04/2023, 7:22 pm

Cancel

Save & New

Save

Expense Item Details for new data



For Expense Item Details for page layouts

IMPORT THE DATA FROM THE FILEDEPARTMENT

Before import we extracted the file Department from the zip file through the given link.

In quick find box we searched for data import and opened it and selected data import wizard and selected the required details and uploaded the department .csv file and it showed the bulk report summary that we imported.

×

🔒

Data Import Wizard | S...

🔗

🔖

⋮

🔍 Search Setup

Setup

Home

Object Manager

Data Import Wizard

Get Started | Help for this page

Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
--------	--------	-----------------	-----------------	----------------	------------	----------------------

Bulk Api Monitoring

Import your data in 3 easy steps!

Launch the Data Import Wizard to import your data.

🔧

Pre-step: Prepare your data for import

☁️

Choose data to import

📊

Edit field mapping

✅

Review and start import

Launch Wizard!

FAQ

How do I prepare my data for import?

How many records can I import?

What kind of objects can I import?

Can I do simultaneous imports?

How long does it take to complete an import?

Data Import video series

Additional Resources

Find import templates and other helpful tools

Learn how to use the Data Import Wizard

CUSTOMIZING USER INTERFACE

In quick find box we searched for users and we created a new user and assigned the position as the CEO



SETUP
Users

User

Prince X

User Profile Help for this Page

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Connected Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0+\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

Edit Sharing Reset Password Freeze

Name	Prince X	Role	CEO
Alias	px	User License	Salesforce
Email	xavierprince58@gmail.com	Profile	System Administrator
Username	prince.xprince@arts.com	Active	<input checked="" type="checkbox"/>
Nickname	xprince	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator		Send Apex Warning Emails	<input type="checkbox"/>
Security Key (U2F or WebAuthn)		Salesforce CRM Content User	<input checked="" type="checkbox"/>
Lightning Login		Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate]	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
		Make Setup My Default Landing Page	<input type="checkbox"/>
		Quick Access Menu	<input checked="" type="checkbox"/>
		Development Mode	<input type="checkbox"/>
		Show View State in Development Mode	<input type="checkbox"/>
		Cache Diagnostics	<input type="checkbox"/>
		Allow Forecasting	<input type="checkbox"/>
		Call Center	
		Phone	
		Extension	
		Fax	
		Mobile	
		Email Encoding	Unicode (UTF-8)
		Employee Number	
		Used Data Space	0 B [View]
		Used File Space	0 B [View]
		Last Login	

Set Groups

Sets

is

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d Apps OAuth Usage

Usage

or Users

Contact Requests

Service Incident

ent

tion

Failed Flow

emplates

commendations

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Layouts

p Builder

tension

sole Tab Limit

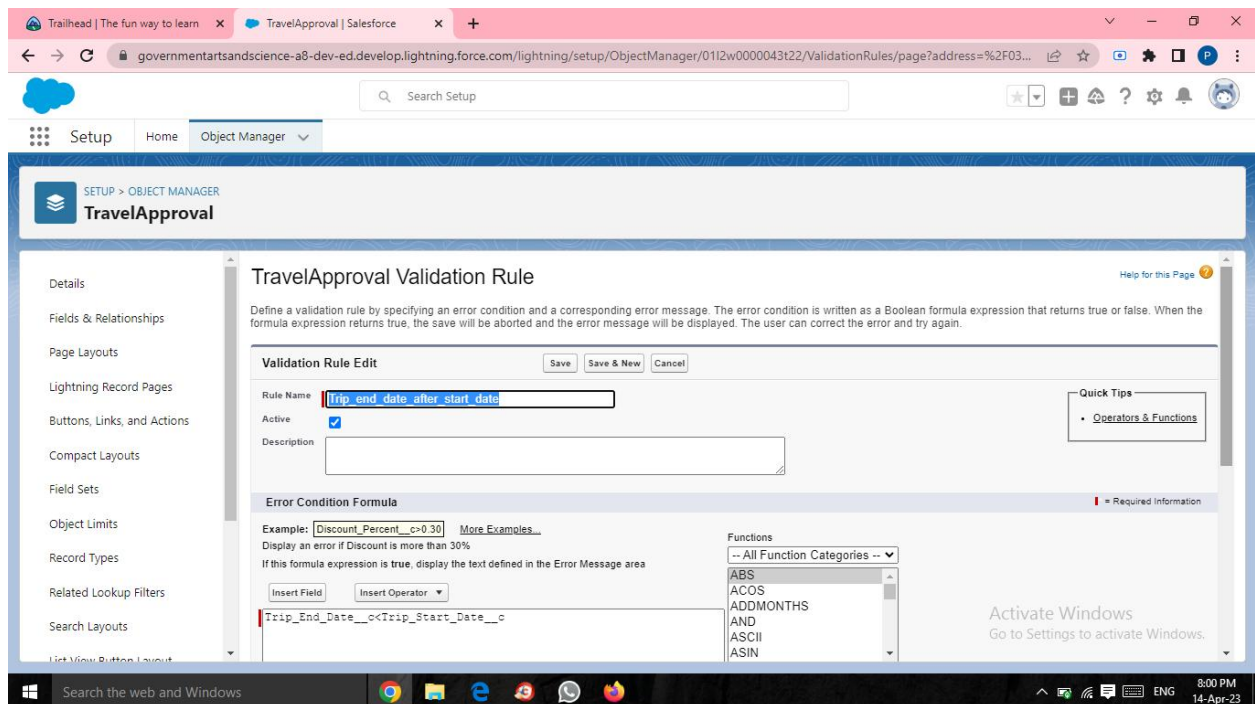
Customize User Interface and Setup details

USE CUSTOMIZATION

In the object manager, Travel approval we edited the page layout and we dropped the fields (Purpose of trip, Trip start date, Trip end date, out of state, Destination State, Department) into Trip Info and saved it

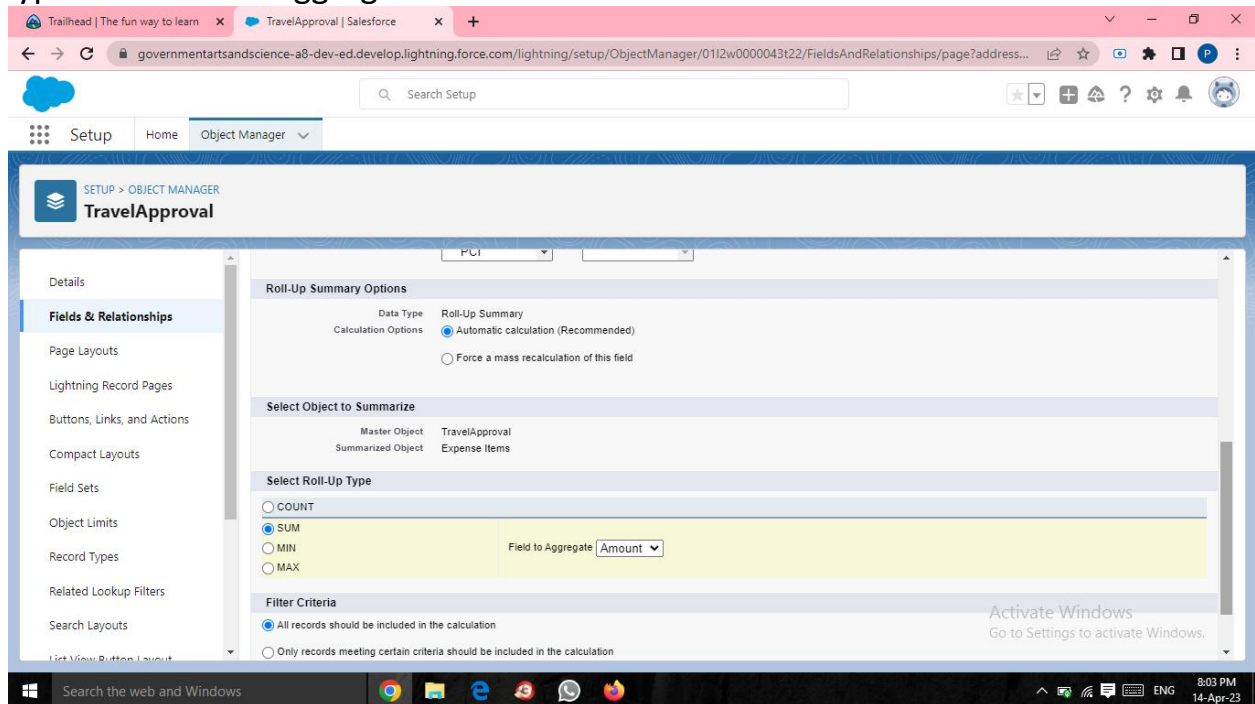
ADDING BUSINESS LOGIC TO TRAVEL APP VALIDATION RULE

In Travel approval object, we created a validation rule to ensure that the Trip end date is greater than or equal to Trip start date.



ROLL SUMMARY FIELD CREATION

In the Travel approval object, we created a field called Total expenses of data type Roll up summary and the roll up type as sum and summarized object as Expense type and fields to aggregate as amount and we saved it.



CREATE FORMULA FIELDS

In the quick find box, we searched for static resources and gave the zip file that we downloaded earlier and created a field Status indicator of data type Formula and created a formula.

REPORT CREATION

In travel approval app, we went inside the report tab and selected new reports and created a reports.

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Reports | Salesforce

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🔍 Search...

Travel Approval

Reports

Dashboards

Departments

TravelApprovals

Expense Items

More

Reports

Recent

3 items

🔍 Search recent reports...

New Report

New Folder

⚙️

REPORTS	Report Name	Descript...	Folder	Created By	Created On	Sub...
Recent	New					
Created by Me	TravelApprovals Report		Private Reports	Prince X	3/4/2023, 12:25 pm	⌵
Private Reports		Which flows run, what's the status of each interview, and how long do users take to complete the screens?				
Public Reports	Sample Flow Report: Screen Flows		Public Reports	Automated Process	9/3/2023, 7:04 pm	⌵
All Reports						
FOLDERS						
All Folders	Travel Requests by Department		Public Reports	Prince X	4/4/2023, 11:12 am	⌵
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Report for travel approval details



Search...



Travel Approval

Reports

Dashboards

Departments

TravelApprovals

Expense Items

More



Report: TravelApprovals

Travel Requests by Department

Enable Field Editing



Add Chart



Edit



Total Records

301

<input type="checkbox"/> Department ↑	TravelApprovals: TravelApprovals	Status	Destination State	Trip Start Date	Trip End Date
<input type="checkbox"/> Audit Services (16)	a032w00000V9W9L	Rejected	FL	09/08/2019	15/08/2019
	a032w00000V9W9V	Approved	TX	28/02/2019	06/03/2019
	a032w00000V9WA1	Approved	TX	30/04/2019	10/05/2019
	a032w00000V9WAK	Approved	OK	27/12/2019	10/01/2020
	a032w00000V9WAT	Approved	FL	21/09/2019	06/10/2019
	a032w00000V9WAW	Approved	OK	03/09/2019	03/09/2019
	a032w00000V9WAY	Approved	CA	20/03/2019	10/04/2019
	a032w00000V9WB7	Approved	OK	08/07/2019	09/07/2019
	a032w00000V9WBX	Approved	FL	07/08/2019	07/08/2019
	a032w00000V9WBx	Approved	FL	18/02/2019	20/02/2019
	a032w00000V9WC1	Approved	OK	04/11/2019	07/11/2019
	a032w00000V9WCI	Rejected	FL	31/05/2019	04/06/2019
	a032w00000V9WCQ	Approved	OK	08/07/2019	08/07/2019
	a032w00000V9WCV	Rejected	CA	22/11/2019	28/11/2019
	a032w00000V9WCI	Approved	FL	15/04/2019	15/04/2019
	a032w00000V9WDu	Rejected	CA	07/04/2019	19/04/2019
Subtotal					
<input type="checkbox"/> Contract Management (20)	a032w00000V9W9J	Approved	TX	22/12/2019	01/01/2020
	a032w00000V9W9T	Approved	FL	08/05/2019	14/05/2019
	a032w00000V9W9b	Approved	OK	11/05/2019	11/05/2019
	a032w00000V9WAG	Approved	CA	23/09/2019	29/09/2019
	a032w00000V9WAd	Approved	FL	28/08/2019	28/08/2019
	a032w00000V9WAl	Rejected	GA	30/03/2019	04/04/2019
	a032w00000V9WB4	Approved	GA	30/01/2019	30/01/2019
	a032w00000V9WBA	Approved	GA	09/02/2019	09/02/2019
	a032w00000V9WCM	Approved	FL	29/01/2019	29/01/2019
	a032w00000V9WCN	Approved	FL	20/02/2019	24/02/2019
	a032w00000V9WD5	Approved	CA	31/03/2019	02/04/2019
	a032w00000V9WDM	Approved	TX	18/01/2019	18/01/2019
	a032w00000V9WDR	Approved	TX	04/07/2019	04/07/2019
	a032w00000V9WDU	Approved	CA	05/07/2019	08/07/2019
	a032w00000V9WDV	Rejected	TX	17/10/2019	20/10/2019
	a032w00000V9WDa	Approved	TX	04/04/2019	04/04/2019
	a032w00000V9WDI	Approved	FL	20/06/2019	23/06/2019
	a032w00000V9WDq	Approved	FL	14/04/2019	05/05/2019
	a032w00000V9WDz	Approved	CA	17/06/2019	20/06/2019
	a032w00000V9WE2	Approved	GA	30/10/2019	02/11/2019
Subtotal					
<input type="checkbox"/> Disability Determination Bureau (19)	a032w00000V9W9E	Approved	OK	01/10/2019	01/10/2019

Travel approval reports data collections

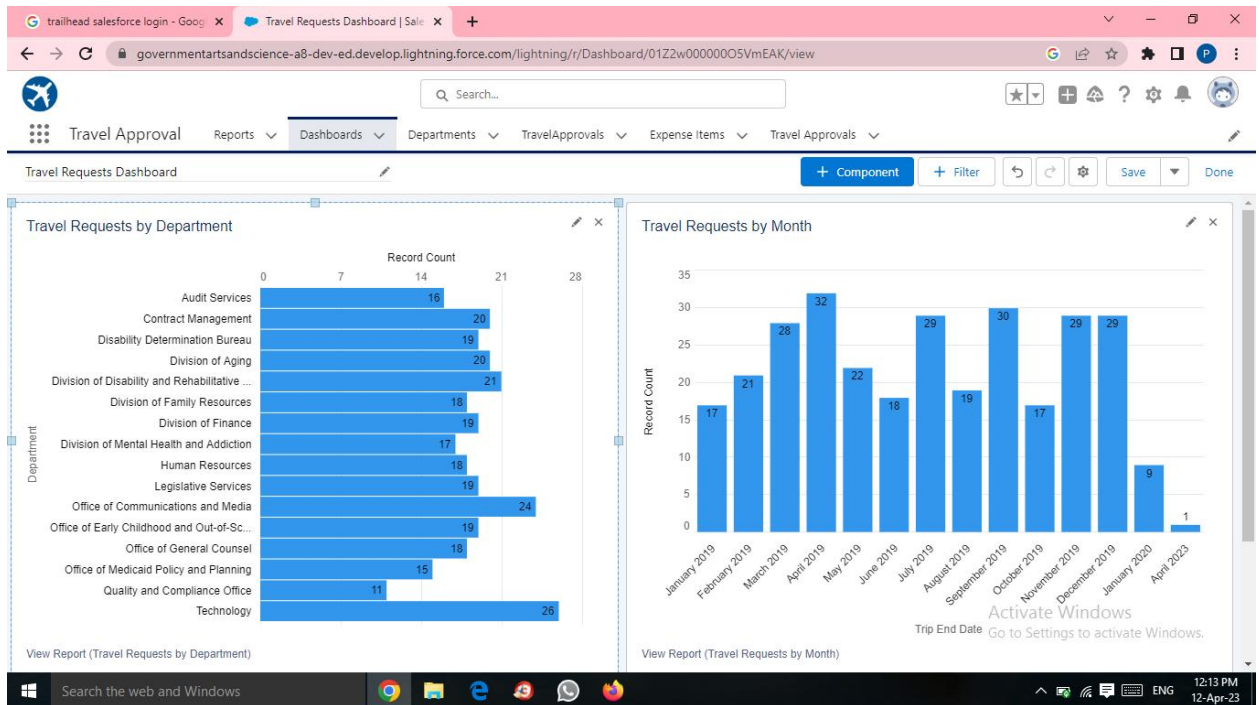
DASHBOARD CREATION

In the travel approval app, we went inside the dashboard tab and created a dashboard containing two graphs.

The screenshot shows the Salesforce Dashboards interface. At the top, there's a navigation bar with a close button, a lock icon, the title 'Dashboards | Salesforce', a share icon, a bookmark icon, and a menu icon. Below this is a search bar and a row of icons including a globe, a star, a plus, a cloud, a question mark, a gear, a bell, and a user profile. The main navigation bar includes 'Travel Approval', 'Reports', 'Dashboards' (selected), 'Departments', 'TravelApprovals', 'Expense Items', and 'More'. The 'Dashboards' section is active, showing a list of recent dashboards. The 'Recent' dashboard is titled 'Travel Requests Dashboard' and was created on 3/4/2023 at 1:52 pm by Prince X. The dashboard is currently empty.

DASHBOARDS	Dashboard ...	Description	Folder	C.	Created On	Subscribed
Recent	Travel Requests Dashboard		Private Dashboards	Prince X	3/4/2023, 1:52 pm	

Dashboards for curate data from reports using charts, tables and metrics.



Travel Approvals Dashboard

4.Trailhead Profile Public URL

Team Lead –X.PRINCE - <https://trailblazer.me/id/prinx1>

Team Member 1

M.UDHAYA PON AISHWARYA - <https://trailblazer.me/id/uaishwarya>

Team Member 2 – A.SANGARAMMAL- <https://trailblazer.me/id/sanga175>

Team Member 3 –K.SATHYA- <https://trailblazer.me/id/sathk29>

5.Advantages & Disadvantages

ADVANTAGES:

1. Tracking Approvals
2. Proposed for destination
3. Travel expenses claim
4. Records prepared in audits

DIS ADVANTAGES:

1. Unsure for employee's safety.
2. Faster process
3. Limits of autonomy
4. Reduces Employee Moral

6.Applications

Travel Approval application will help users quickly send a travel request through mobile for using emails. Travel App allows and approve business trips.

7.CONCLUSION

Travel approval application is a purpose for trip and status. Then the trip start date and trip end date are used a records of data.

The expense item for a travel cost and hotel charges. The dashboard is reflection of her records in charts.

8.*Future Scope*

The travel approval agency sector worldwide need for suitable travel options in according in their wants and capabilities. In addition, they help them plan trips to domestic or international destinations, accommodation, transport, insurance and fares.

Emerging technologies will provide visitor with easy way to access equipments.