

GOVERNMENT ARTS COLLEGE FOR WOMEN SALEM-8

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BUILD AN EMPLOYEE TRAVEL APPROVAL APPLICATION FOR CORPORATES

1 INTRODUCTION

1.1 OVERVIEW

Build an employee travel approval application for corporations is to provide a more streamlined, automated, and, efficient process for managing employee travel requests. The application allows employees to submit the travel requests through a user-friendly interface while, managers can review and approve these requests from a centralized platform.

1.2 PURPOSE

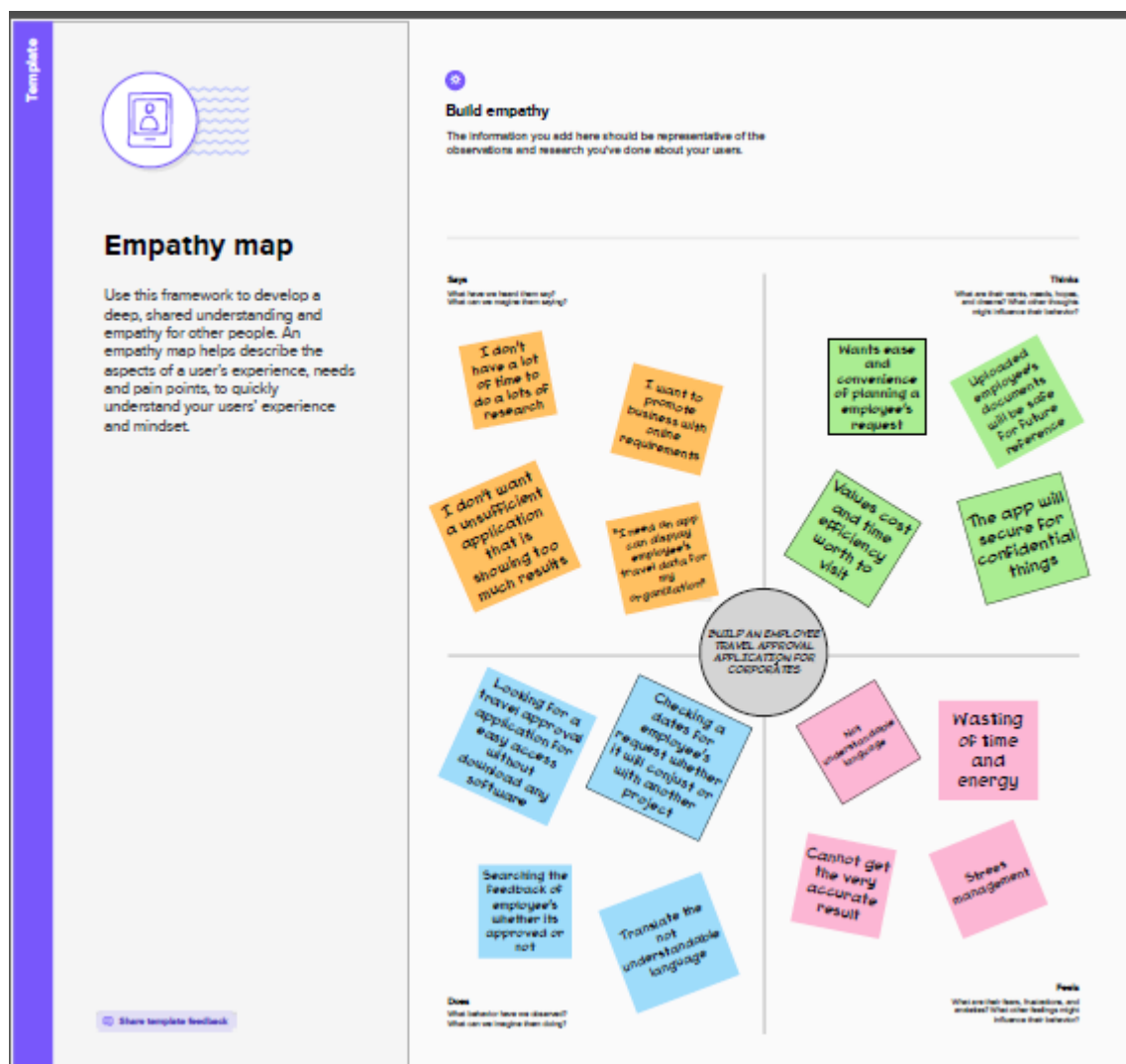
The purpose of building an employee travel approval application for corporations is to create a more efficient and cost-effective travel management process, ensuring compliance with policies, improving communication and decision-making, and increasing employee satisfaction.

1.3 OBJECTIVE

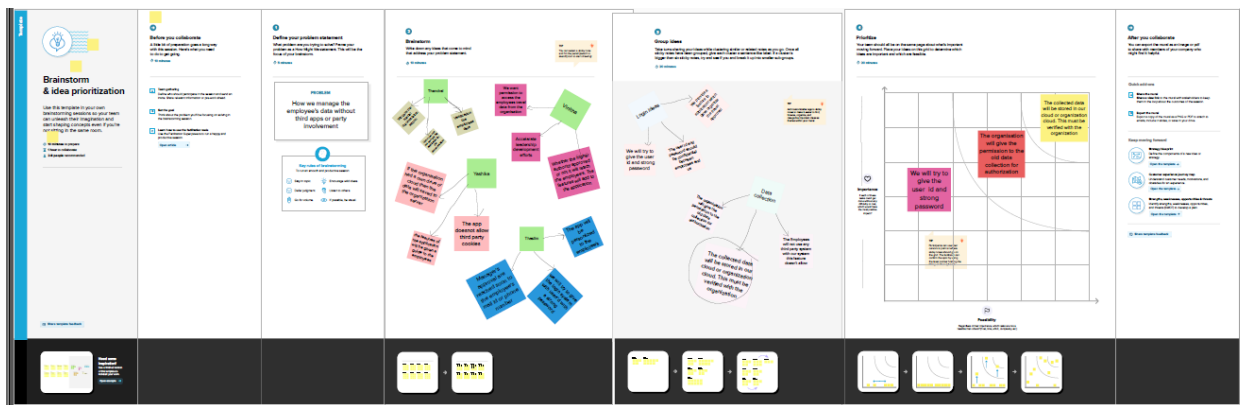
- * This project gives best experience in salesforce.
- * This project gives real time knowledge of salesforce.
- * To create travel approval application is helpful for corporates Employees
- * This project helps to me how to create travel approval application in salesforce.
- * In working my project,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

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP



2.2 IDEATION & BRAINSTORMING MAP SCREENSHOT



3. RESULT

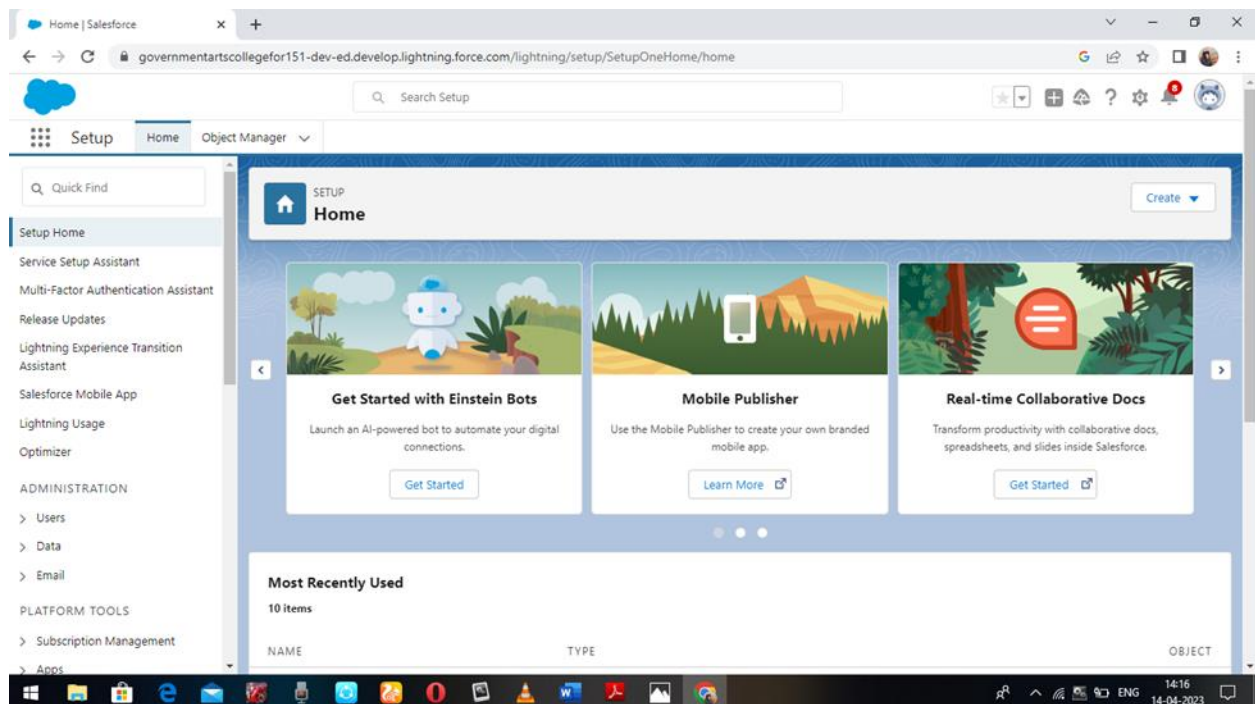
3.1 DATA MODEL

Object Name	Fields in the object	
1.Department	Field Label	Data type
	Department Code	Text
2.Expense Item	Field Label	Data Type
	Amount	Currency
	Expense Type	Picklist
	Travel Approval	Master-Detail Relationship
3.Travel Approval	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 ACTIVIITY & SCREENSHOT

MILES STONE -1

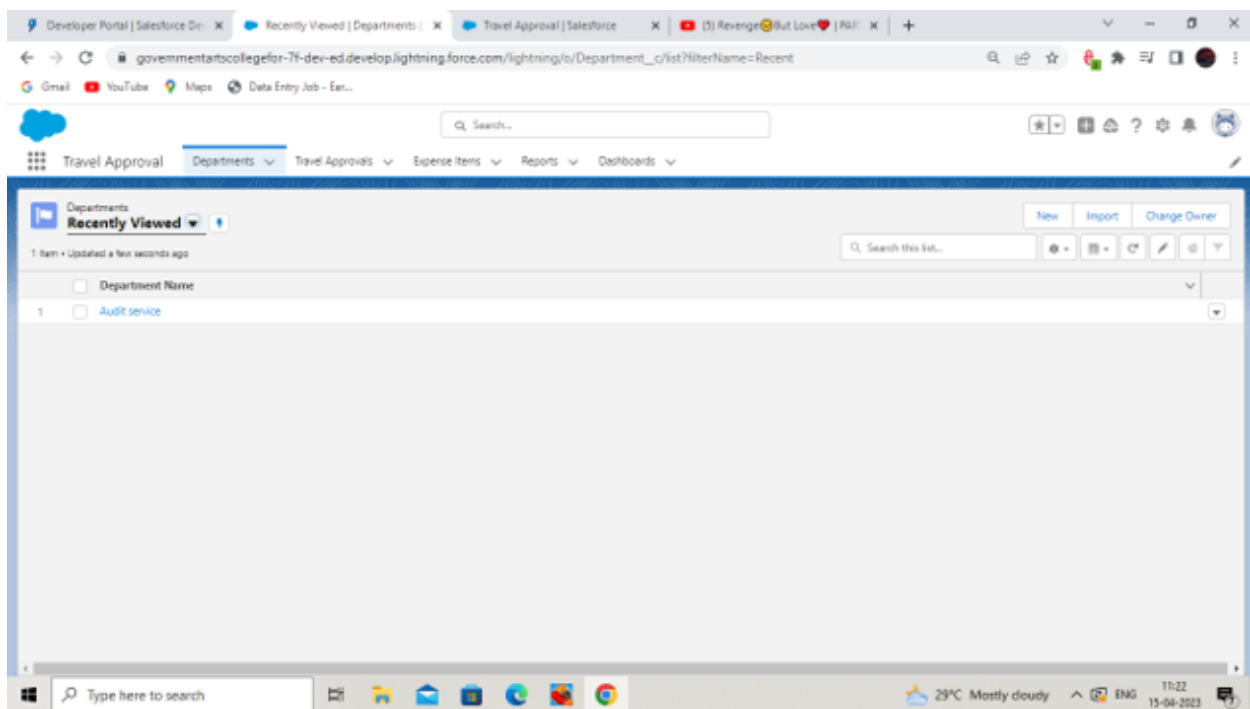
CREATE SALESFORCE ORG



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.



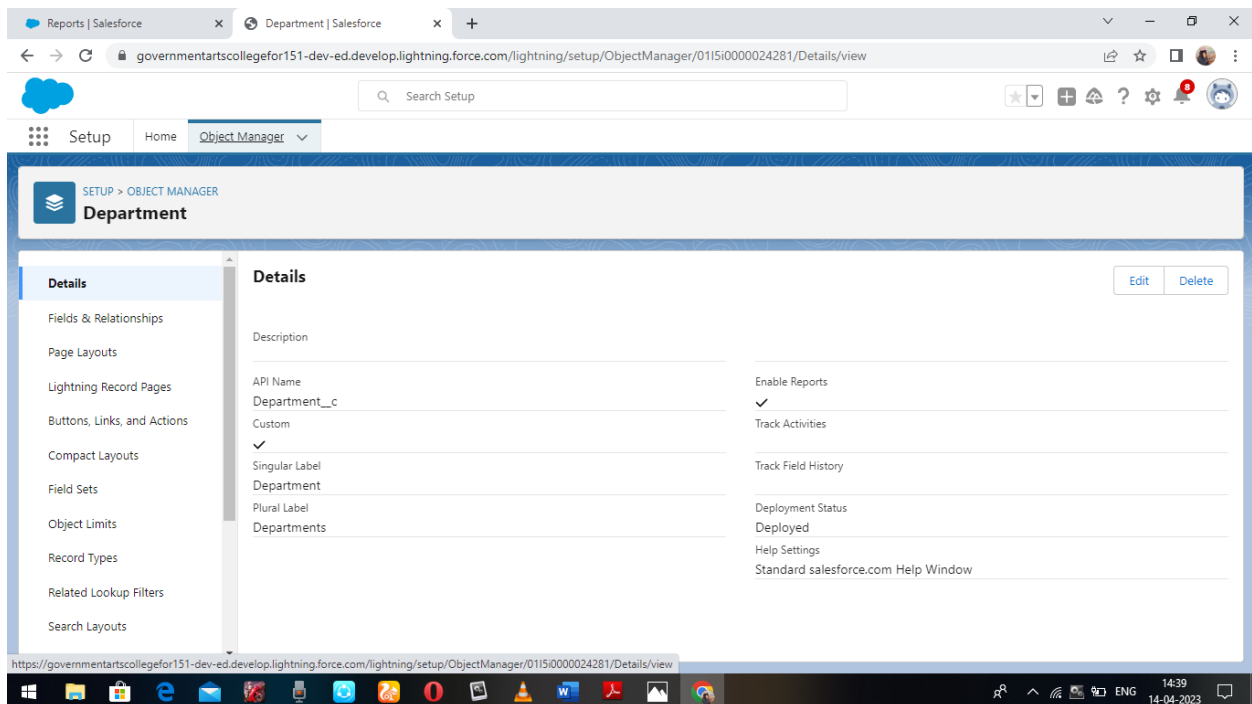
From setup enter app manager in quick find box and select app manager. Click new lightning app. Enter app name travel approval and necessary custom object. Select profile as system administrator and click finish. Finally Travel approval application is created

MILES STONE -3

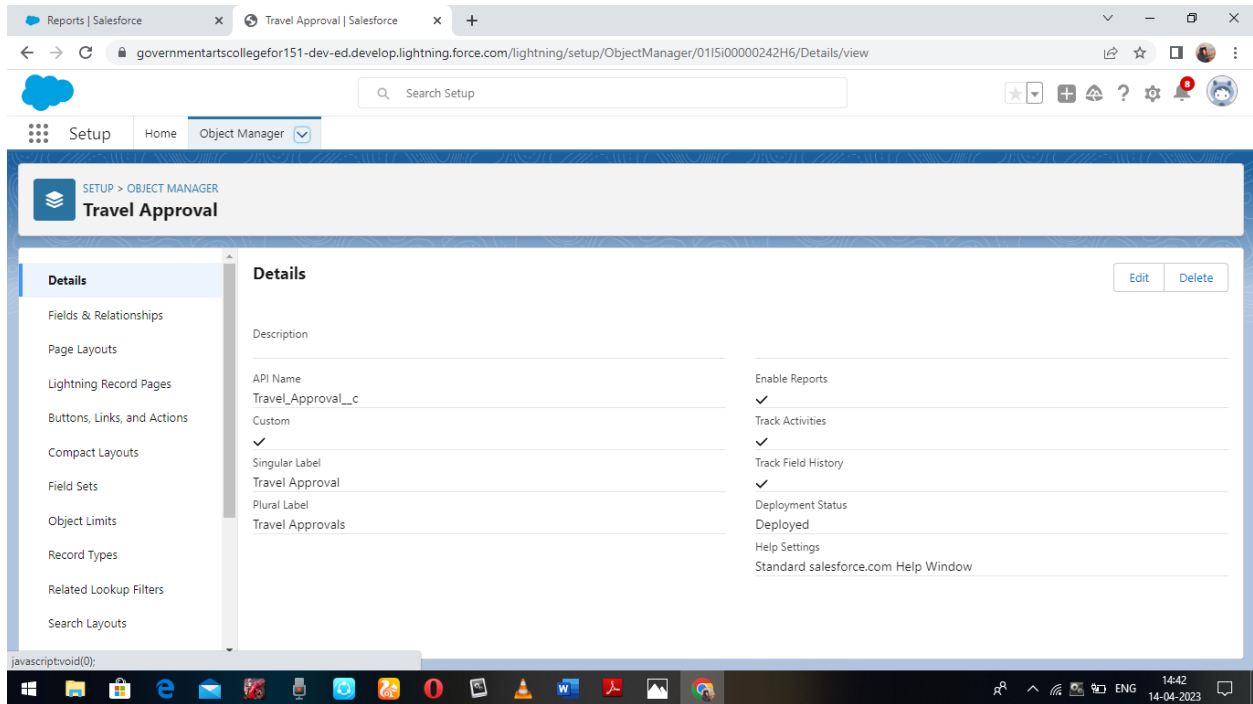
CUSTOM OBJECT CREATION

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

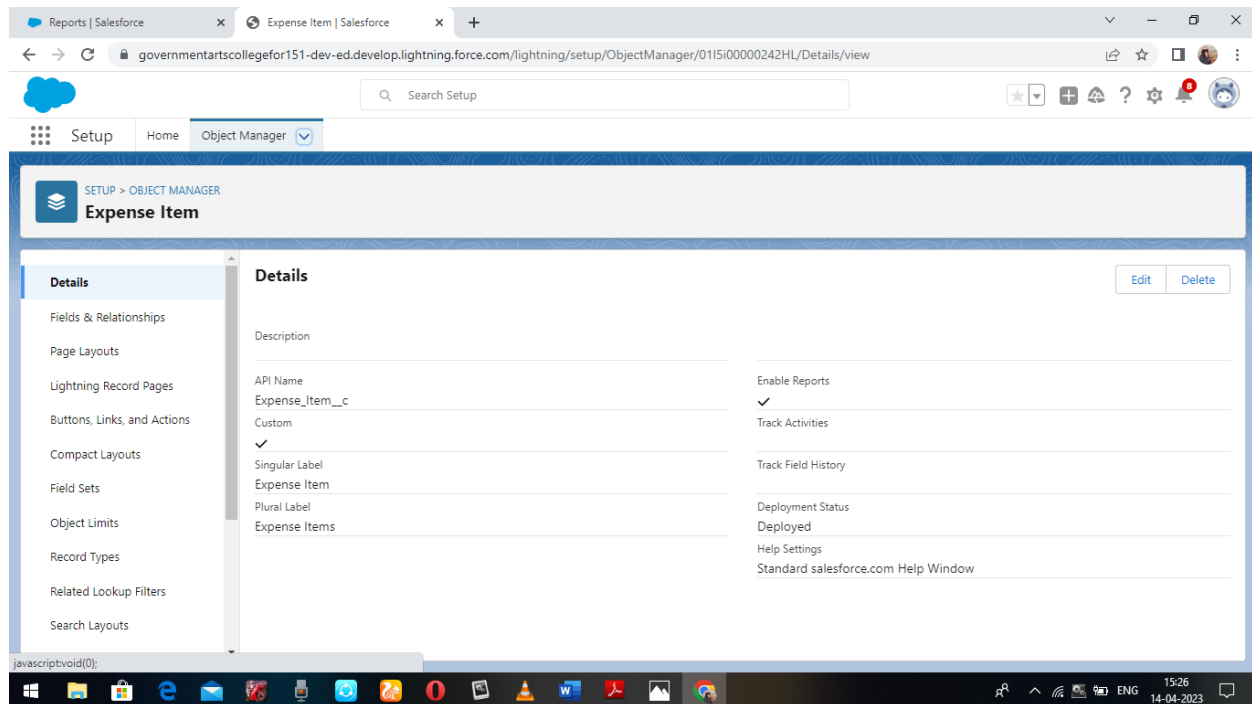
CREATE DEPARTMENT OBJECT



CREATE TRAVEL APPROVAL OBJECT



CREATE EXPENSE ITEM OBJECT

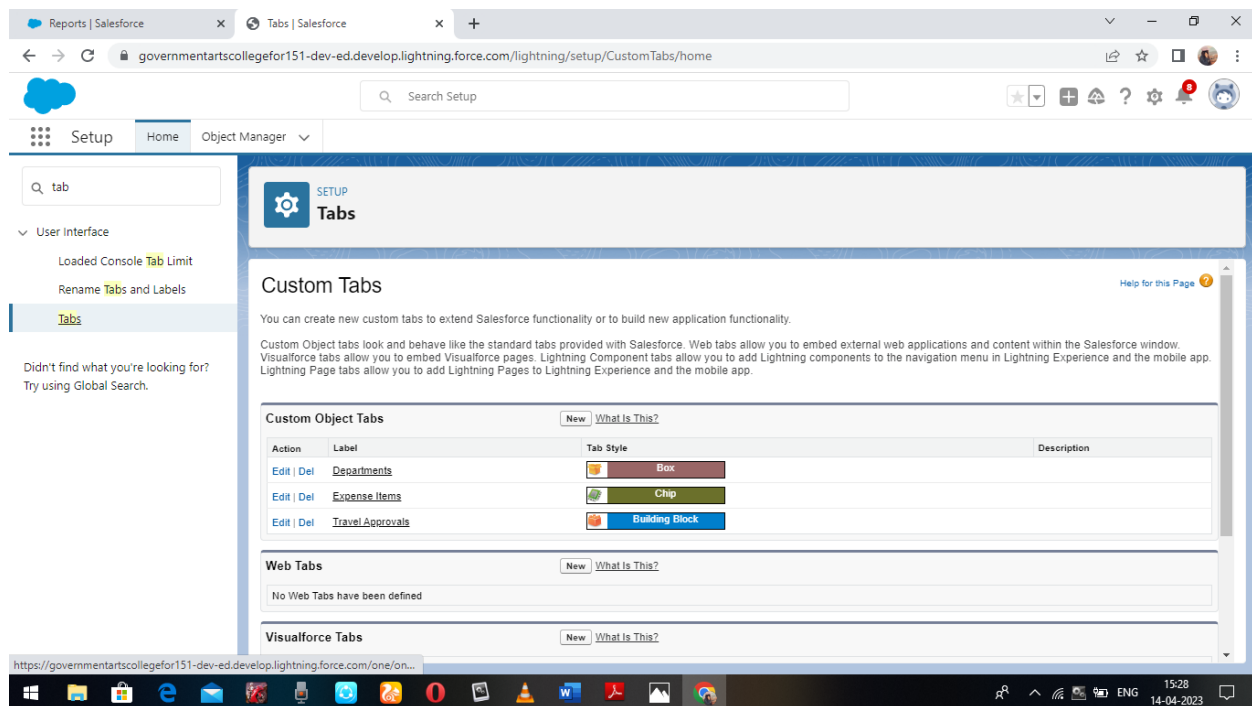


First, I have to create custom objects. From setup page click object manager, click create, click on custom object. Enter the department object click allow report, search and save. In this we have to create travel approval and expense item.

MILES STONE -4

CREATE CUSTOM TAB

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

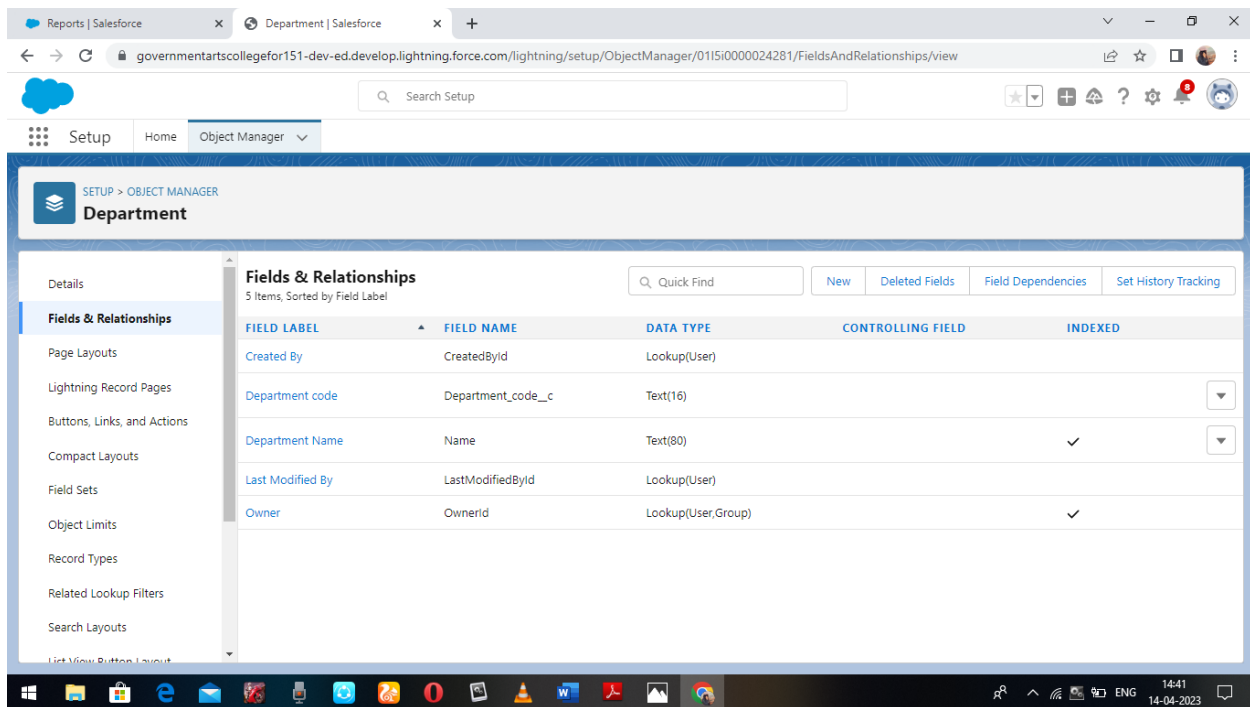


Click home tab and select tabs under custom objects click new for objects choose already create a custom object department, travel approval, expense item. Select anyone tab style. Then create a custom tab.

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 list of fields. The table below summarizes the fields shown:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department code	Department_code__c	Text(16)		
Department Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Reports | Salesforce

Travel Approval | Salesforce

+

governmentartscollegefor151-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011500000242H6/FieldsAndRelationships/view

Search Setup

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	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		
Owner	OwnerId	Lookup(User,Group)		✓
Purpose of Trip	Purpose_of_Trip__c	Text Area(255)		
Status	Status__c	Picklist		

14:42

14-04-2023

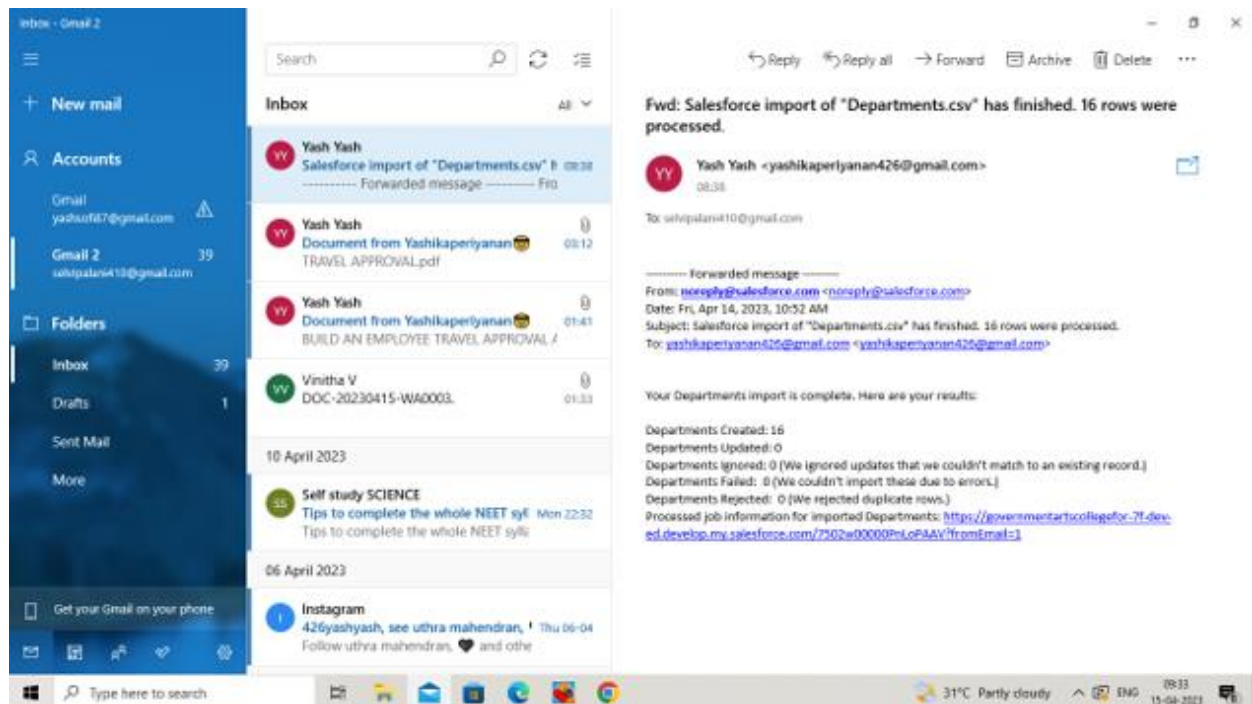
The screenshot displays the Salesforce Object Manager interface for the 'Expense Item' object. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area shows a table of fields with the following data:

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)		✓

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.

MILES STONE -6

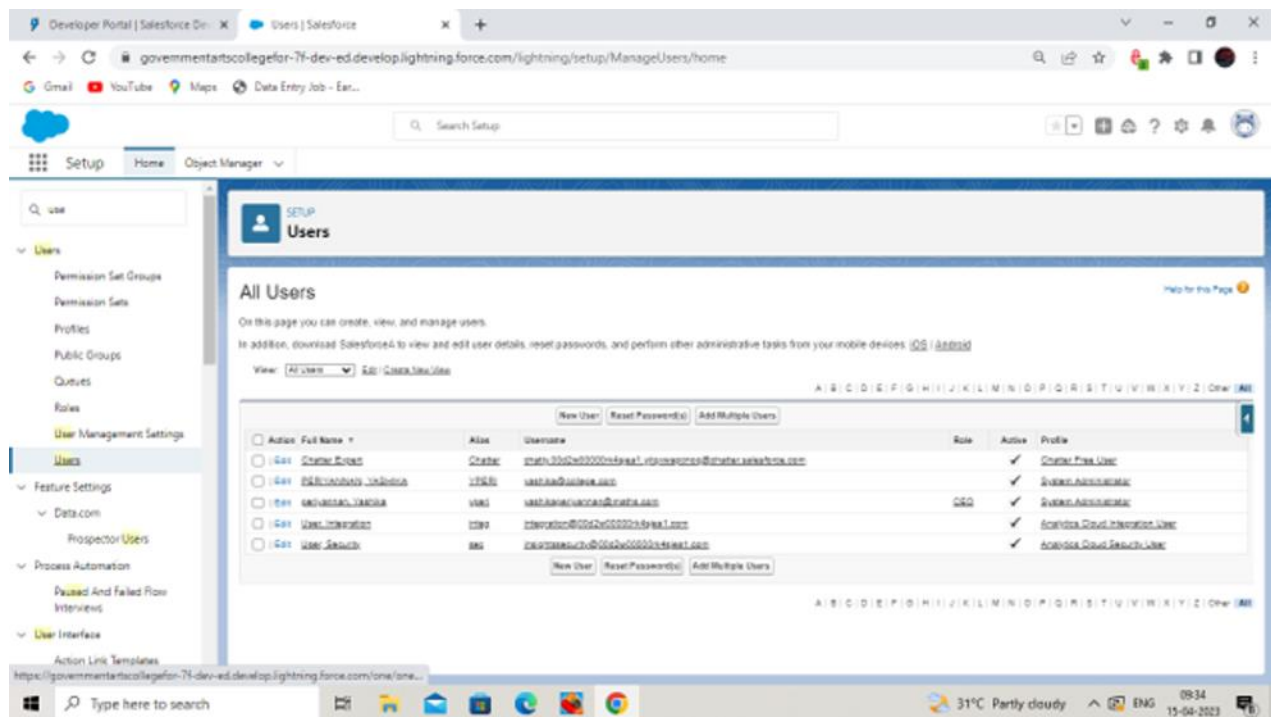
IMPORT DEPARTMENTS



Select on home tab select data import wizard and click launch wizard click custom object tab select department object select add new record and drag and drop the departments CSV file click next, click data import, click on then the records imported successfully.

CUSTOMIZE USER INTERFACE

A user is anyone who logs into salesforce



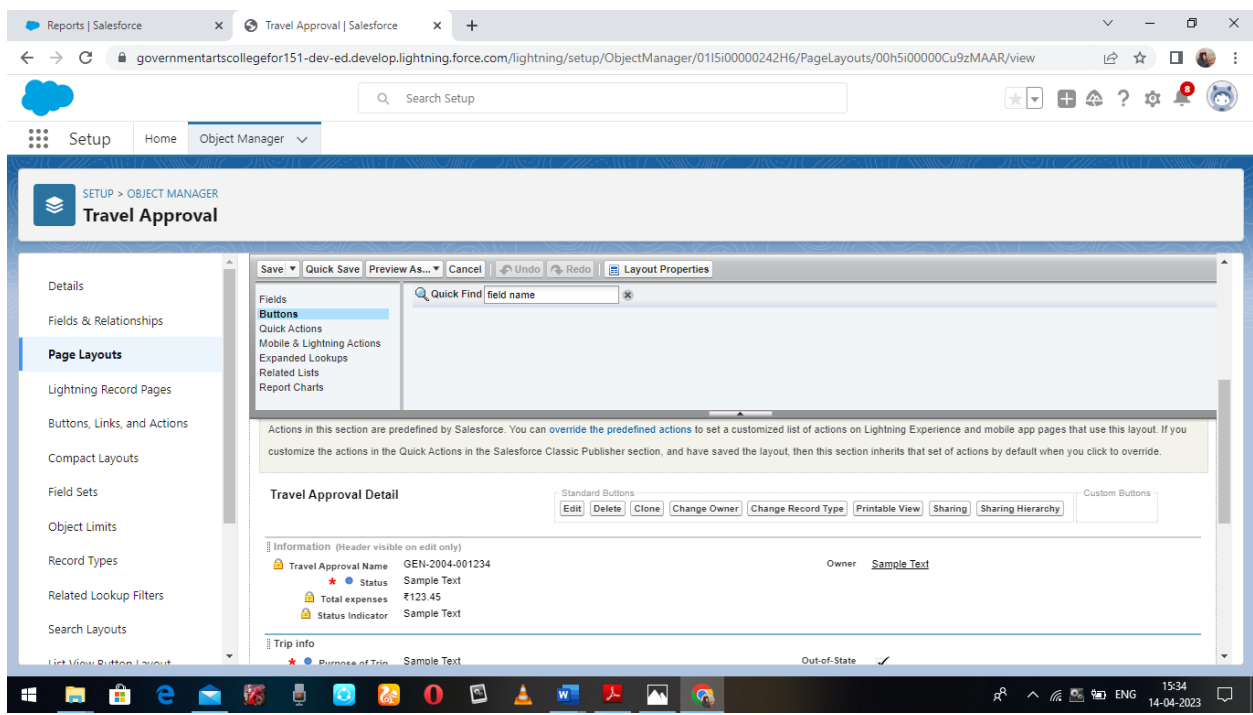
From home page select users click new give name and enter email, user name, role as CEO, profile as system administrator and license as sales force click save. User will be created.

MILES STONE -8

USE CUSTOMISATION

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

CUSTOMIZE TRAVEL APPROVAL PAGE LAYOUT



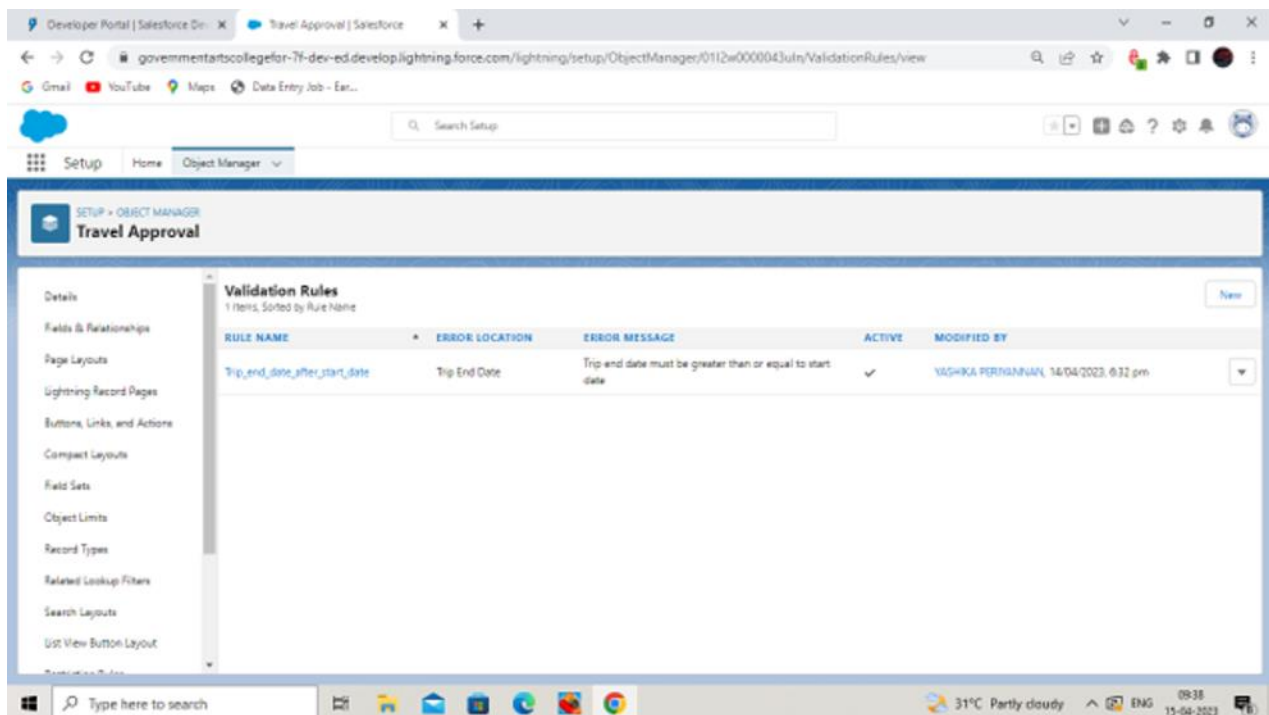
From travel approval object click page layout click edit. Drag section from the below the information section.

Section name as trip info Drag purpose of a trip, trips start date, trips start date, trip end date fields in the trip info section. Drag out of state, destination, date right side of trip of section. Drag department left hand column of trip info section. Drag department left hand column of trip info section to the right- hand column click save.

MILE STONE -9

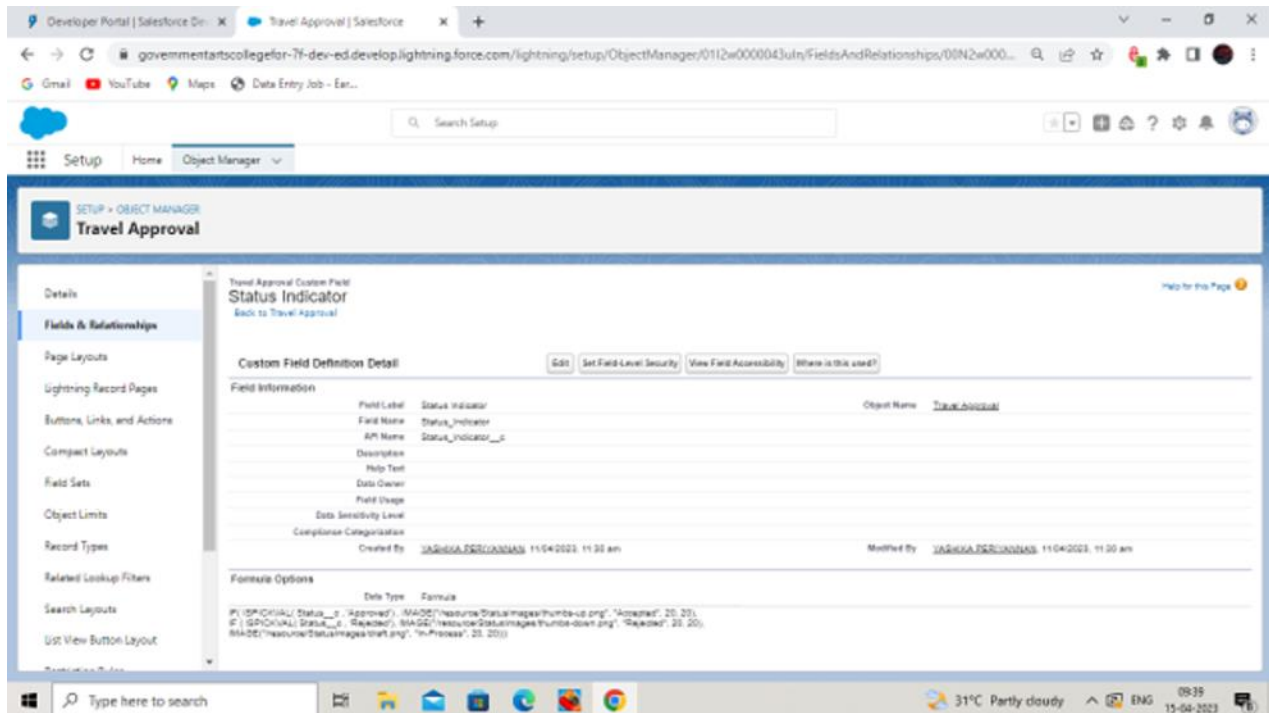
ADD BUSINESS LOGIC TO TRAVEL APP

1.CREATE VALIDATION RULE



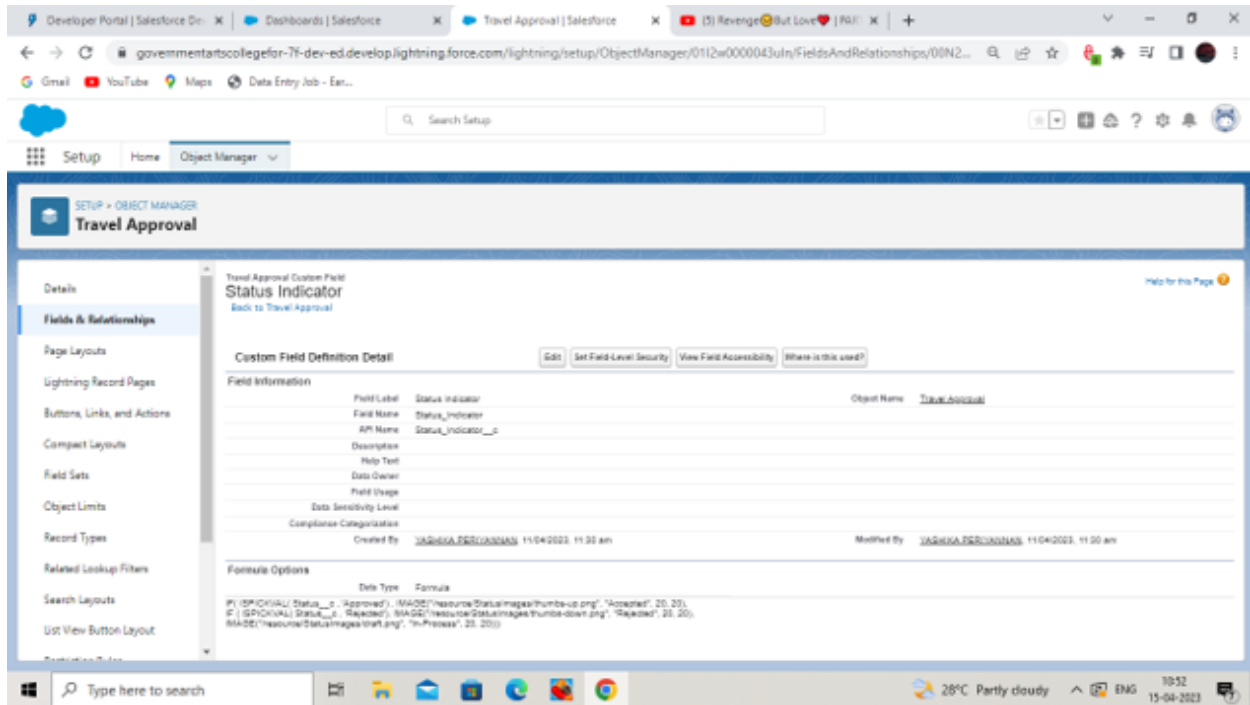
Select travel approval object click validation rule and enter the error condition formula .Select field and pick trip end date as the location of error .

2.CREATE ROLL UP SUMMARY FIELDS



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

3.CREATE FORMULA FIELDS

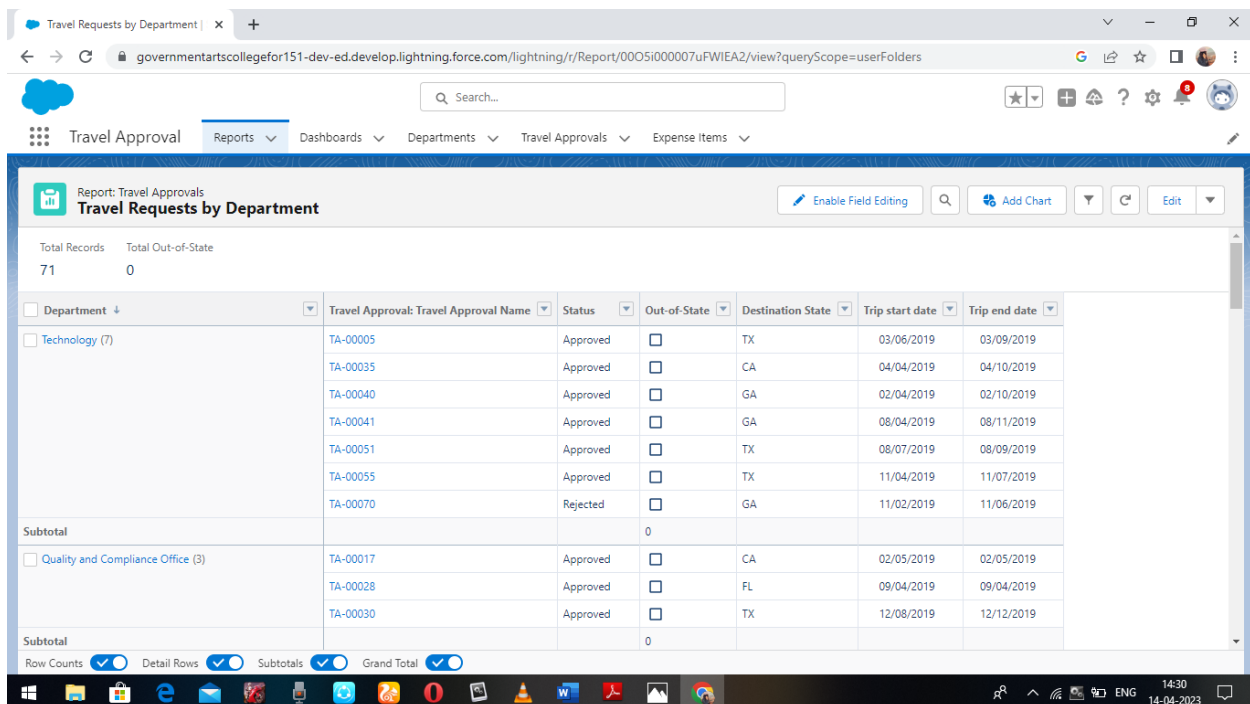


From home tab select static resources click new. Name status images and select the file click save. And create a status indicator field in travel approval object. Data type as a formula. Enter the status formula and click save.

MILES STONE -10

REPORTS

Reports in salesforce in 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.



The screenshot shows a Salesforce report interface. The browser address bar indicates the URL is `governmentartscollegefor151-dev-ed.develop.lightning.force.com/lightning/r/Report/0005i000007uFWIEA2/view?queryScope=userFolders`. The Salesforce navigation bar shows the user is in the 'Travel Approval' app, viewing a 'Reports' page. The report title is 'Report: Travel Approvals' and 'Travel Requests by Department'. It includes summary statistics: 'Total Records: 71' and 'Total Out-of-State: 0'. The report table has columns for Department, Travel Approval Name, Status, Out-of-State, Destination State, Trip start date, and Trip end date. The data is grouped by Department, with 'Technology (7)' and 'Quality and Compliance Office (3)' visible. At the bottom, there are controls for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are currently checked.

Department	Travel Approval: Travel Approval Name	Status	Out-of-State	Destination State	Trip start date	Trip end date
Technology (7)	TA-00005	Approved	<input type="checkbox"/>	TX	03/06/2019	03/09/2019
	TA-00035	Approved	<input type="checkbox"/>	CA	04/04/2019	04/10/2019
	TA-00040	Approved	<input type="checkbox"/>	GA	02/04/2019	02/10/2019
	TA-00041	Approved	<input type="checkbox"/>	GA	08/04/2019	08/11/2019
	TA-00051	Approved	<input type="checkbox"/>	TX	08/07/2019	08/09/2019
	TA-00055	Approved	<input type="checkbox"/>	TX	11/04/2019	11/07/2019
	TA-00070	Rejected	<input type="checkbox"/>	GA	11/02/2019	11/06/2019
Subtotal			0			
Quality and Compliance Office (3)	TA-00017	Approved	<input type="checkbox"/>	CA	02/05/2019	02/05/2019
	TA-00028	Approved	<input type="checkbox"/>	FL	09/04/2019	09/04/2019
	TA-00030	Approved	<input type="checkbox"/>	TX	12/08/2019	12/12/2019
Subtotal			0			

The screenshot shows a Salesforce report titled "Travel Requests by Month". The report is displayed in a web browser window. The report header includes a search bar and several action buttons: "Enable Field Editing", "Add Chart", "Filter", "Share", and "Edit". The report shows a total of 71 records. The data is organized into a table with columns: "Trip end date", "Out-of-State", "Travel Approval: Travel Approval Name", "Department", "Status", "Destination State", and "Trip start date". The table is filtered by month, showing data for January, February, and March 2019. The data is grouped by month, with subtotals for each month. The table shows that all travel requests are approved and have a status of "Approved". The destinations are primarily in Texas (TX) and Florida (FL). The departments include Disability Determination Bureau, Division of Family Resources, Division of Finance, Office of General Counsel, Legislative Services, and Audit Services.

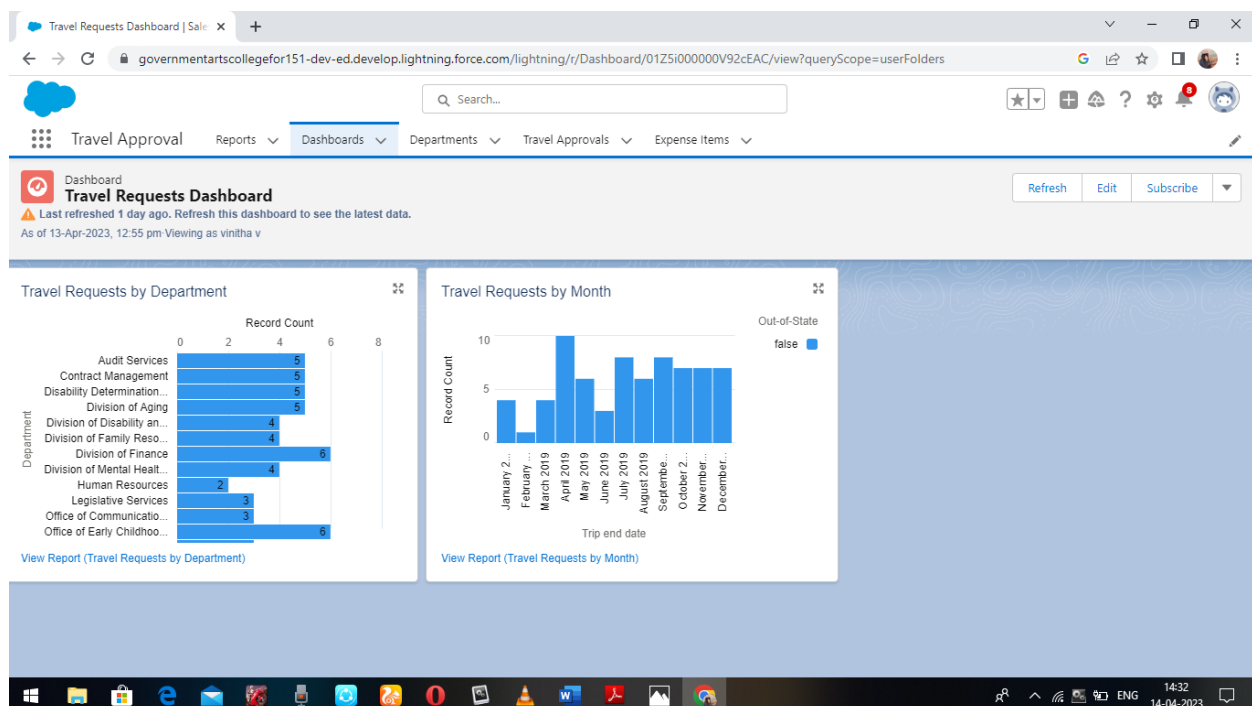
Trip end date	Out-of-State	Travel Approval: Travel Approval Name	Department	Status	Destination State	Trip start date
January 2019 (4)	(4)	TA-00001	Disability Determination Bureau	Approved	OK	10/01/2019
		TA-00012	Division of Family Resources	Approved	TX	04/01/2019
		TA-00038	Division of Finance	Approved	TX	10/01/2019
		TA-00071	Office of General Counsel	Approved	TX	04/01/2019
	Subtotal					
Subtotal						
February 2019 (1)	(1)	TA-00061	Division of Family Resources	Approved	FL	12/02/2019
	Subtotal					
Subtotal						
March 2019 (4)	(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

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

MILE STONE-11

CREATE TRAVEL APPROVALS 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.



Click on dashboard tab from the travel approval application, click new dashboard and give dashboard name, click +component select report which you created for the data visualization select any of the chart, table etc...

4. TRAILHEAD PROFILE PUBLIC URL

TEAM LEAD

YASHIKA P- <https://trailblazer.me/id/yperiyannan>

TEAM MEMBER 1

THASLIM A- <http://trailblazer.me/id/taskar>

TEAM MEMBER 2

THENDRAL E- <https://trailblazer.me/id/thene16>

TEAM MEMBER 3

VINITHA V- <https://trailblazer.me/id/viniv13>

5 ADVANTAGES AND 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

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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 of a travel approval application on the salesforce platform. First, we have to create empathy map and ideation brainstorming map.

Then create travel application and then create custom object, custom tab and fields and relationship. Next, we have to import department and create user, customize travel approval object page layout and add business logic and finally we've to create reports and dashboards.

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 employee.