# 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, manages 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
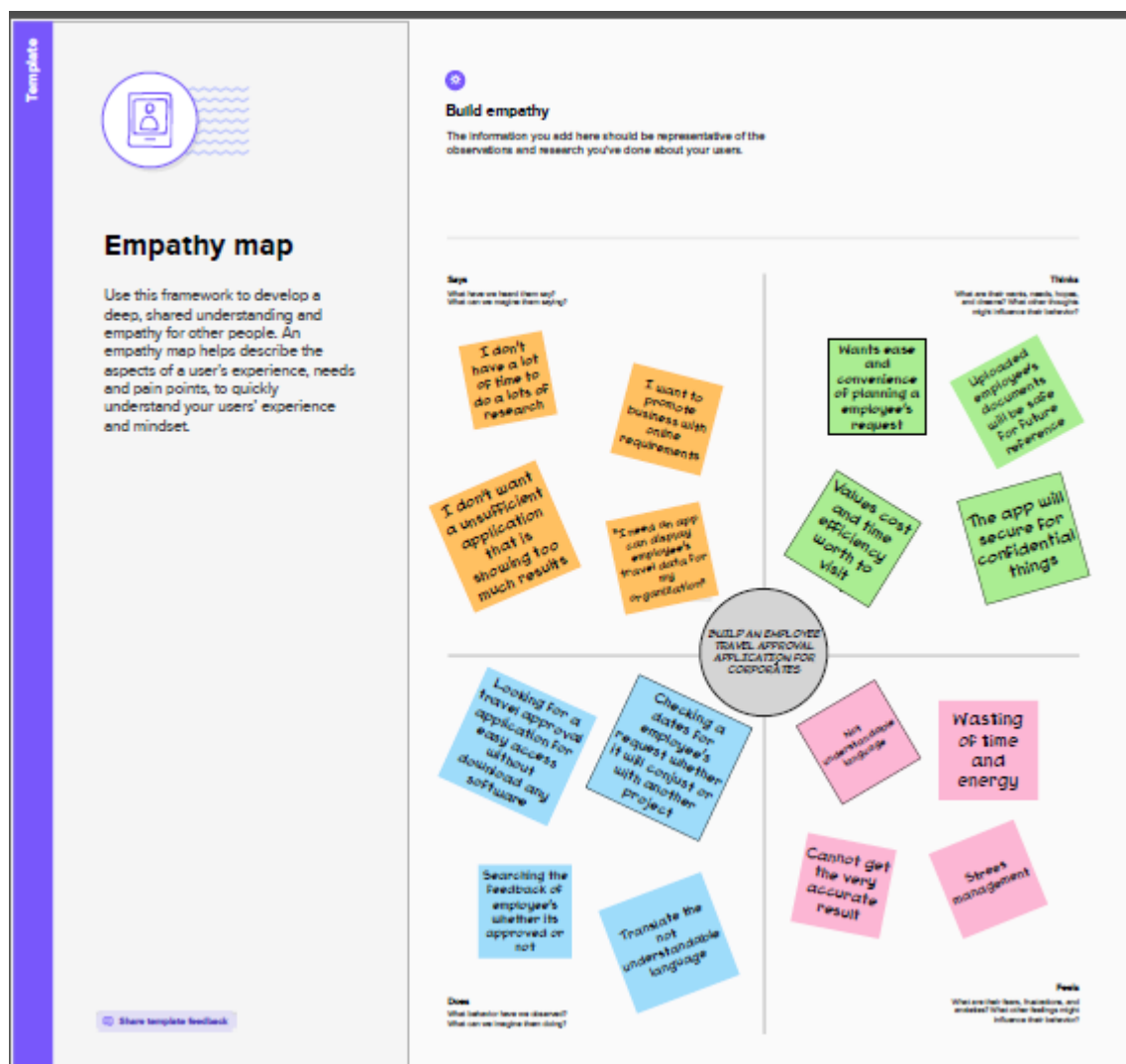
## 2.2 IDEATION & BRAINSTORMING MAP SCREENSHOT
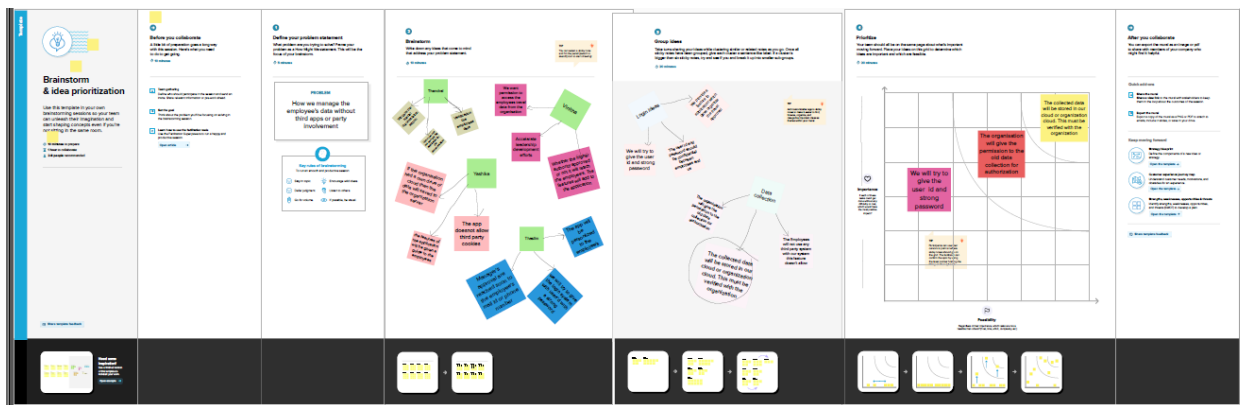
# 3. RESULT

## 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
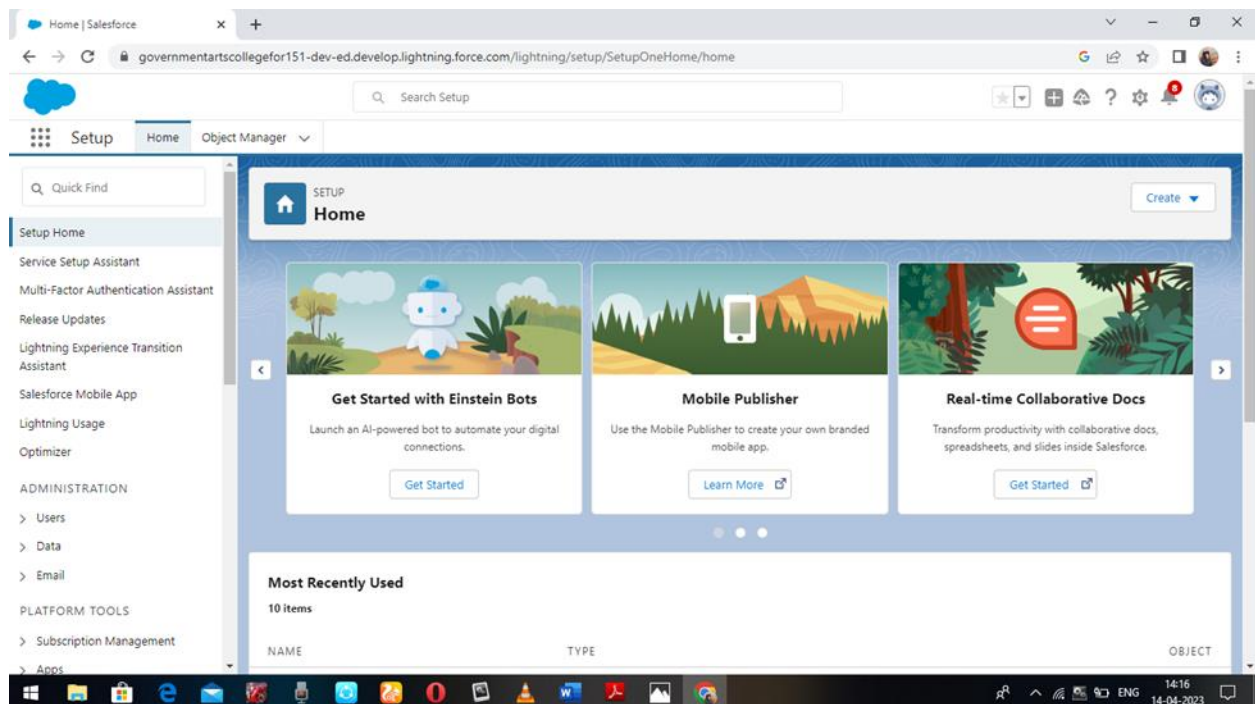
# MILE STONE-2

## 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.
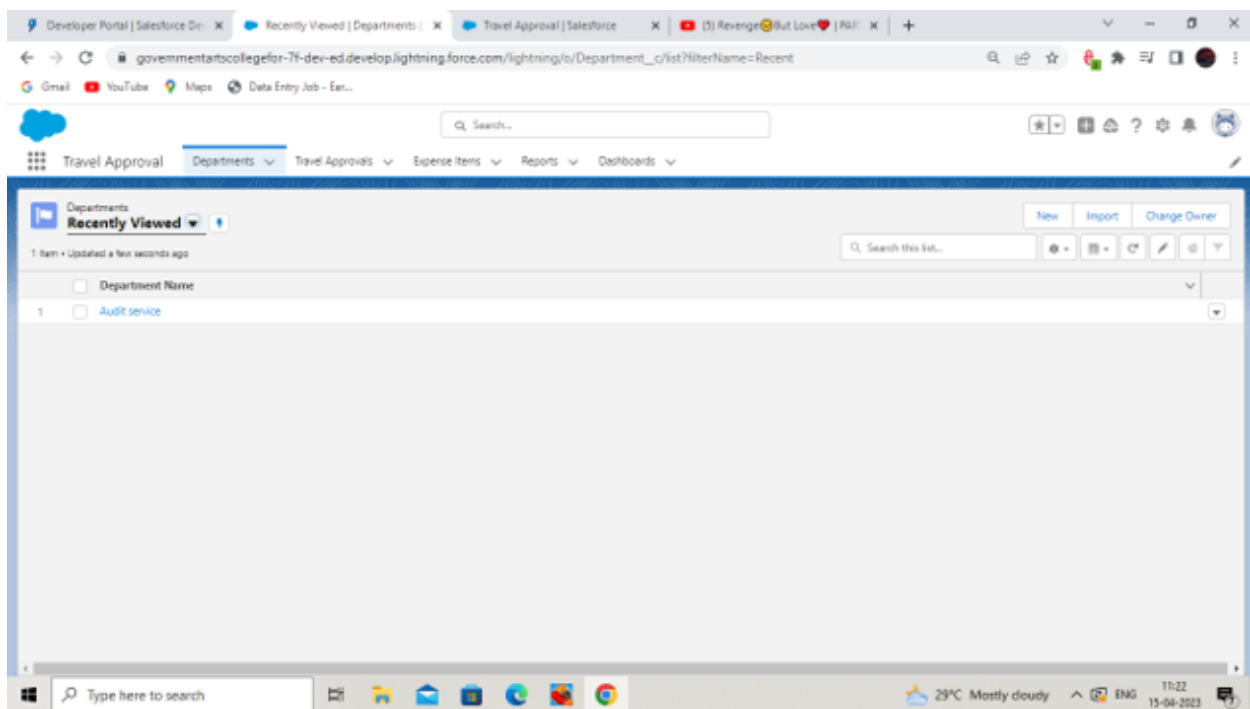


From setup enter app manager in quick find box and select app manager. Click new lightning app. Enter app name travel approval and necessary custom object. Select profile as system administrator and click finish. Finally Travel approval application is created

# 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
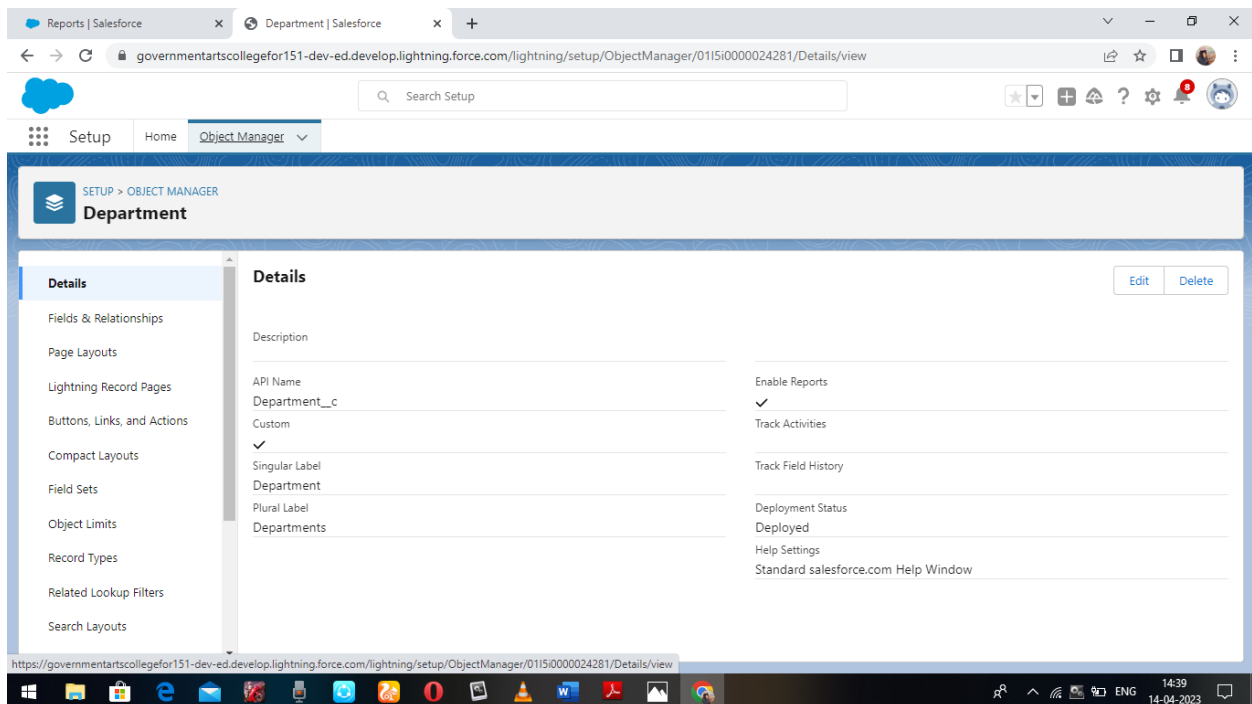
# CREATE TRAVEL APPROVAL OBJECT
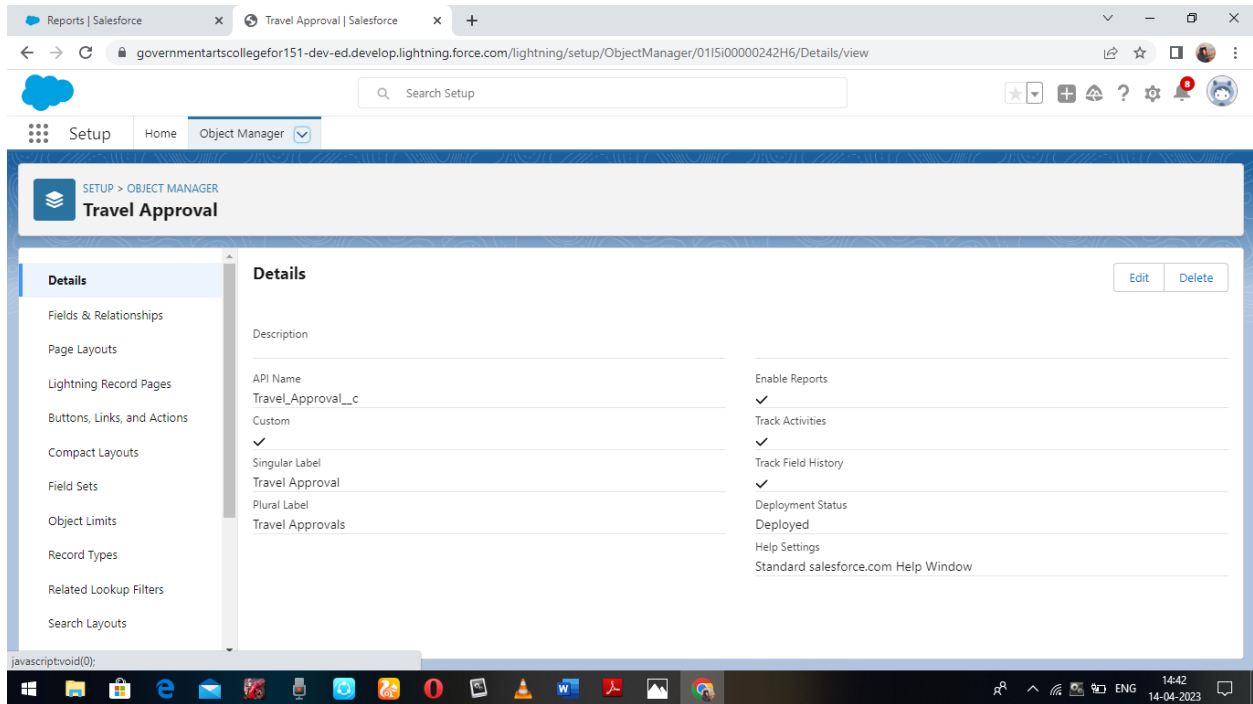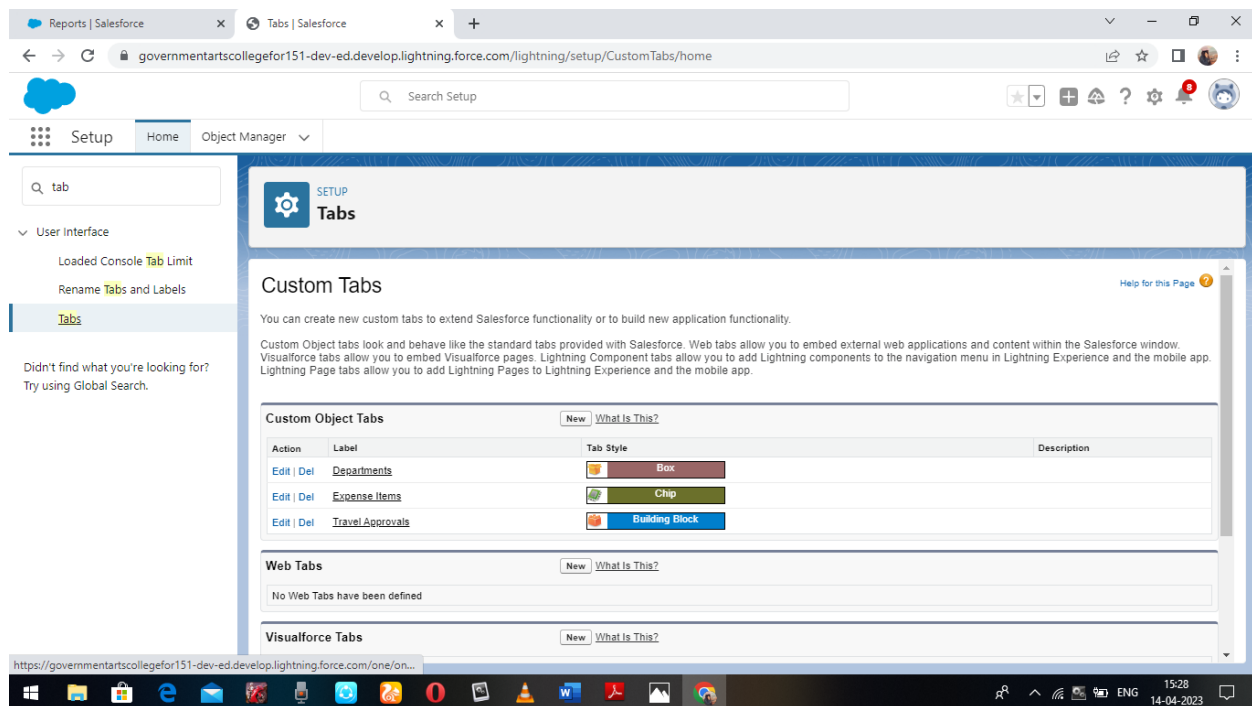
# CREATE EXPENSE ITEM OBJECT
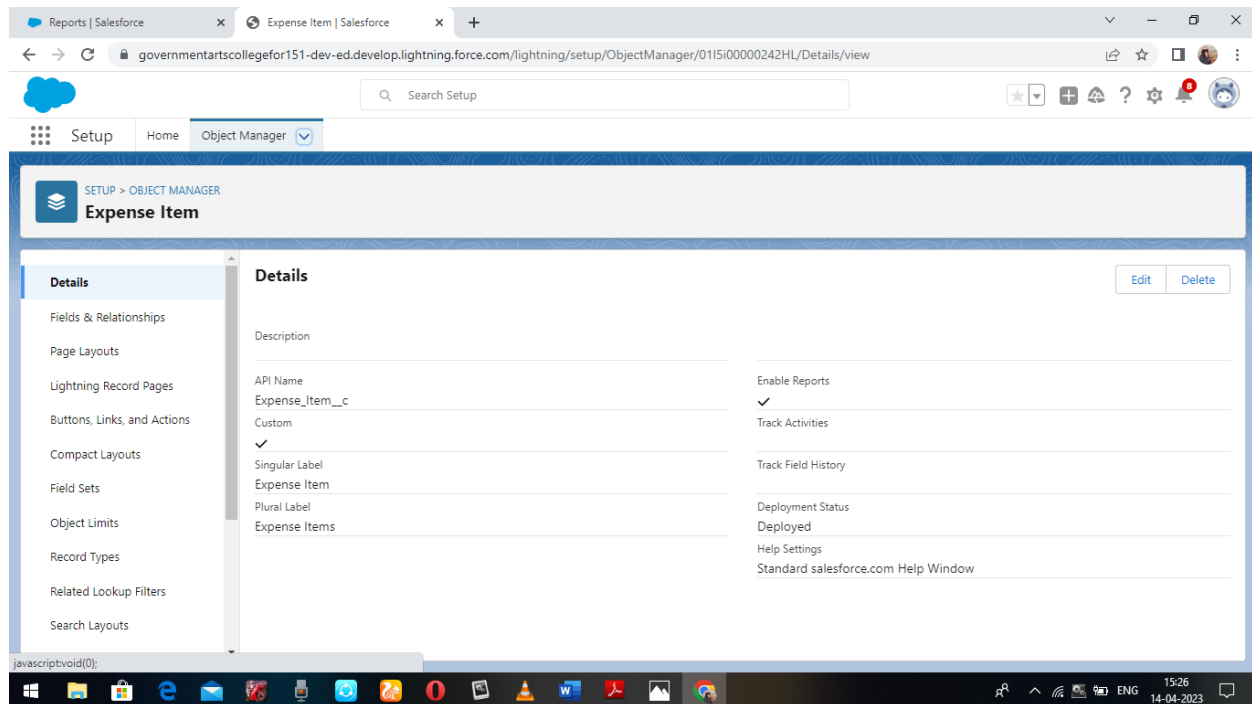


First, I have to create custom objects. From setup page click object manager, click create, click on custom object. Enter the department object click allow report, search and save. In this we have to create travel approval and expense item.

# 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.
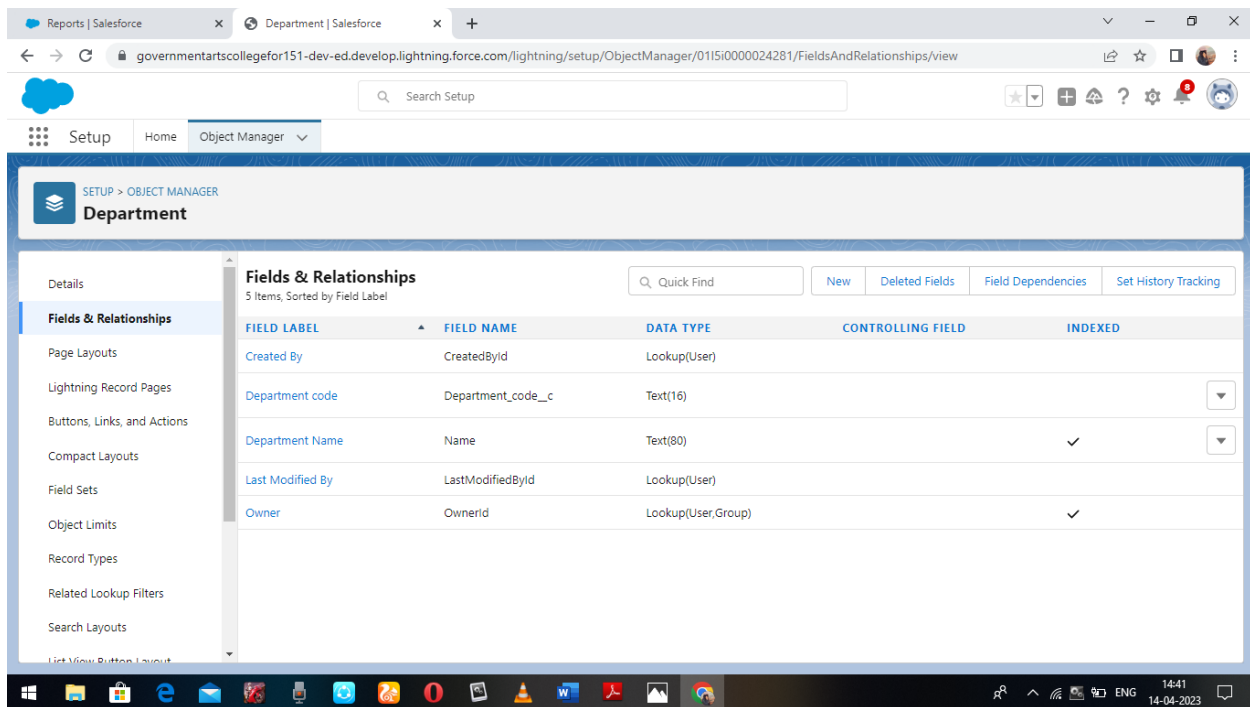


Click home tab and select tabs under custom objects click new for objects choose already create a custom object department, travel approval, expense item. Select anyone tab style. Then create a custom tab.

# 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.

Setup    Home    Object Manager ⌄

SETUP > OBJECT MANAGER
**Travel Approval**

Details

**Fields & Relationships**

**Fields & Relationships**
13 Items, Sorted by Field Label

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

| 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 | | | ▼ |
| Owner | OwnerId | Lookup(User,Group) | | ✓ | |
| Purpose of Trip | Purpose_of_Trip__c | Text Area(255) | | | ▼ |
| Status | Status__c | Picklist | | | ▼ |

Quick Find    New    Deleted Fields    Field Dependencies    Set History Tracking

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.
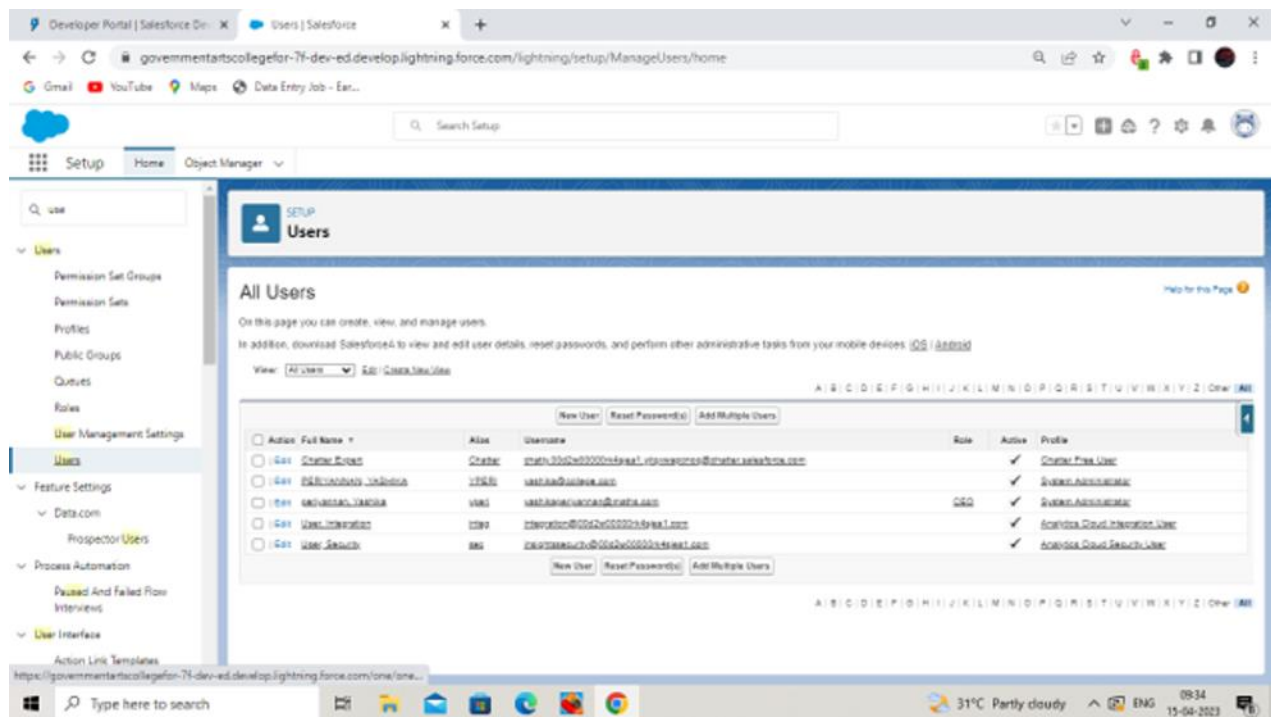
# MILES STONE -6

## IMPORT DEPARTMENTS
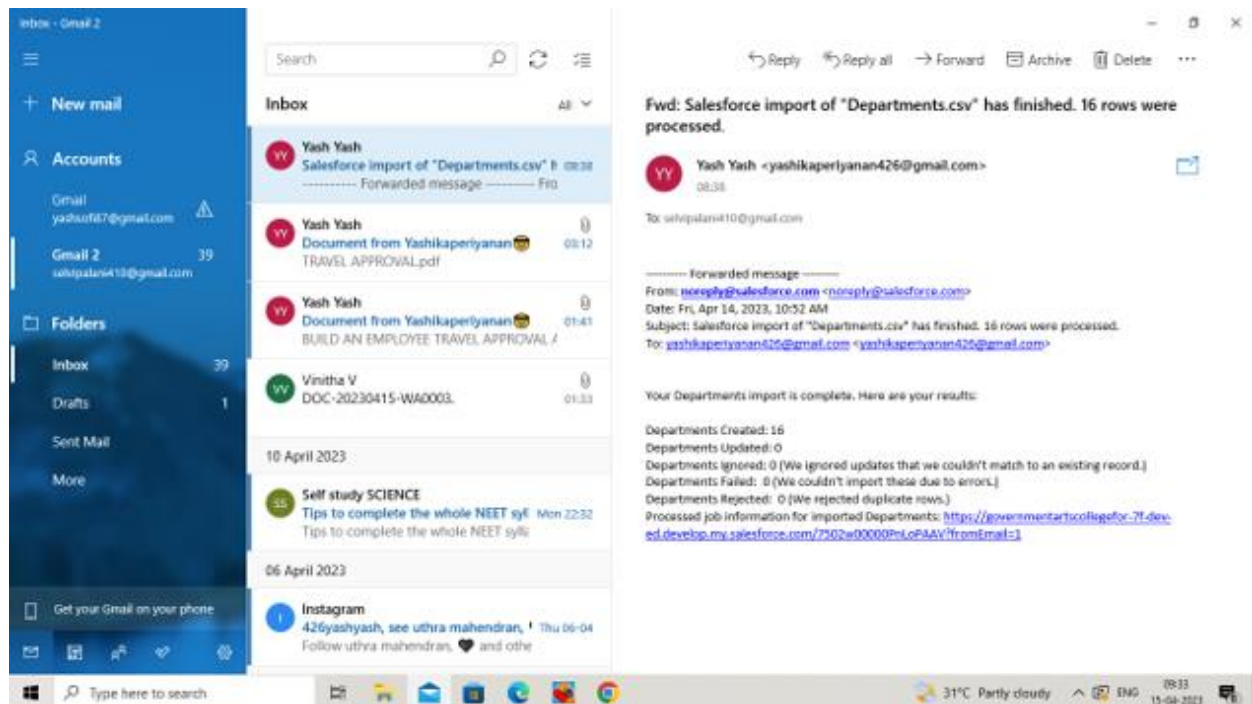


    Select on home tab select data import wizard and click launch wizard click custom object tab select department object select add new record and drag and drop the departments CSV file click next, click data import, click on then the records imported successfully.

# MILES STONE-7

## 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
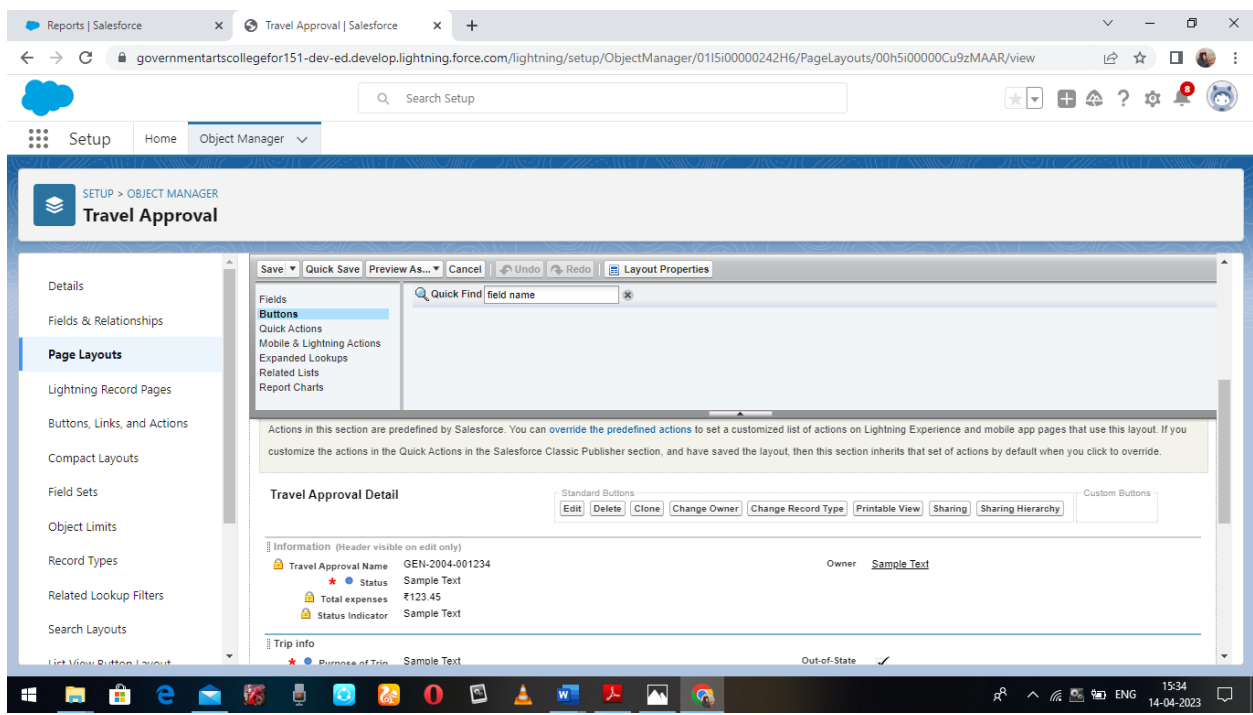


    From travel approval object click page layout click edit. Drag section from the below the information section.

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
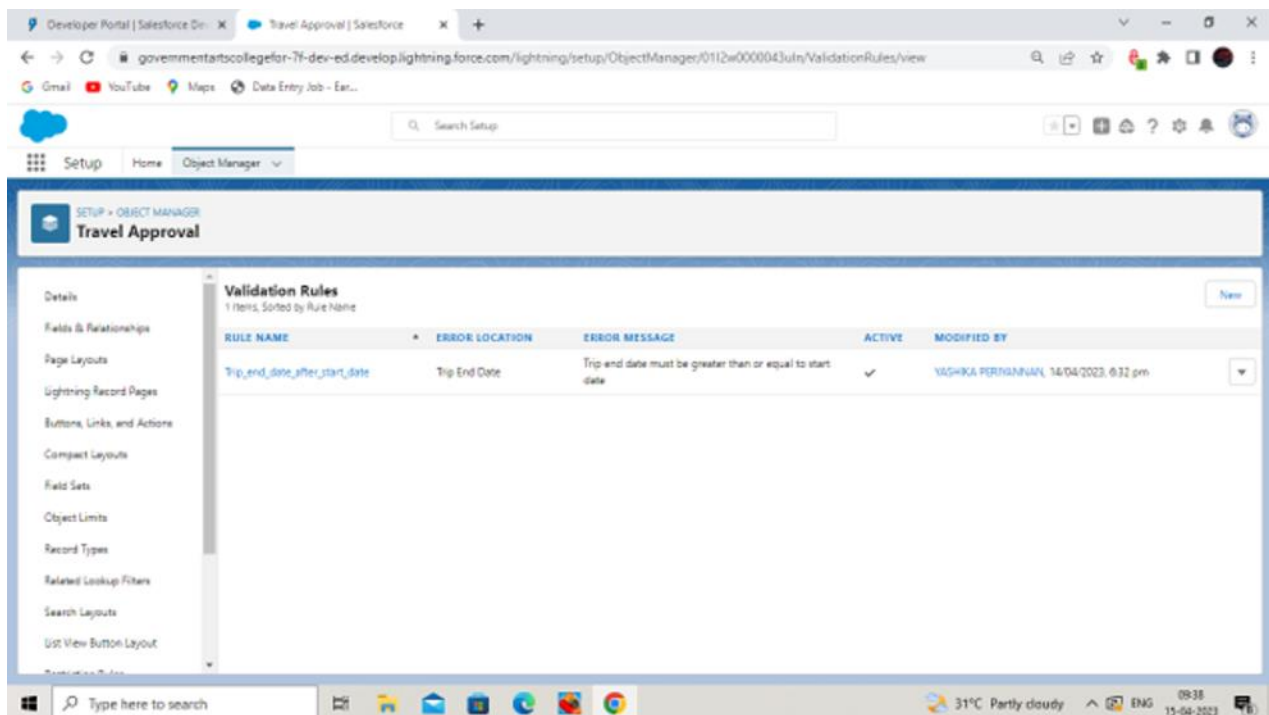


      Select travel approval object click validation rule and  enter the error condition formula .Select field and pick trip end date as the location of error .

## 2.CREATE ROLL UP SUMMARY FIELDS
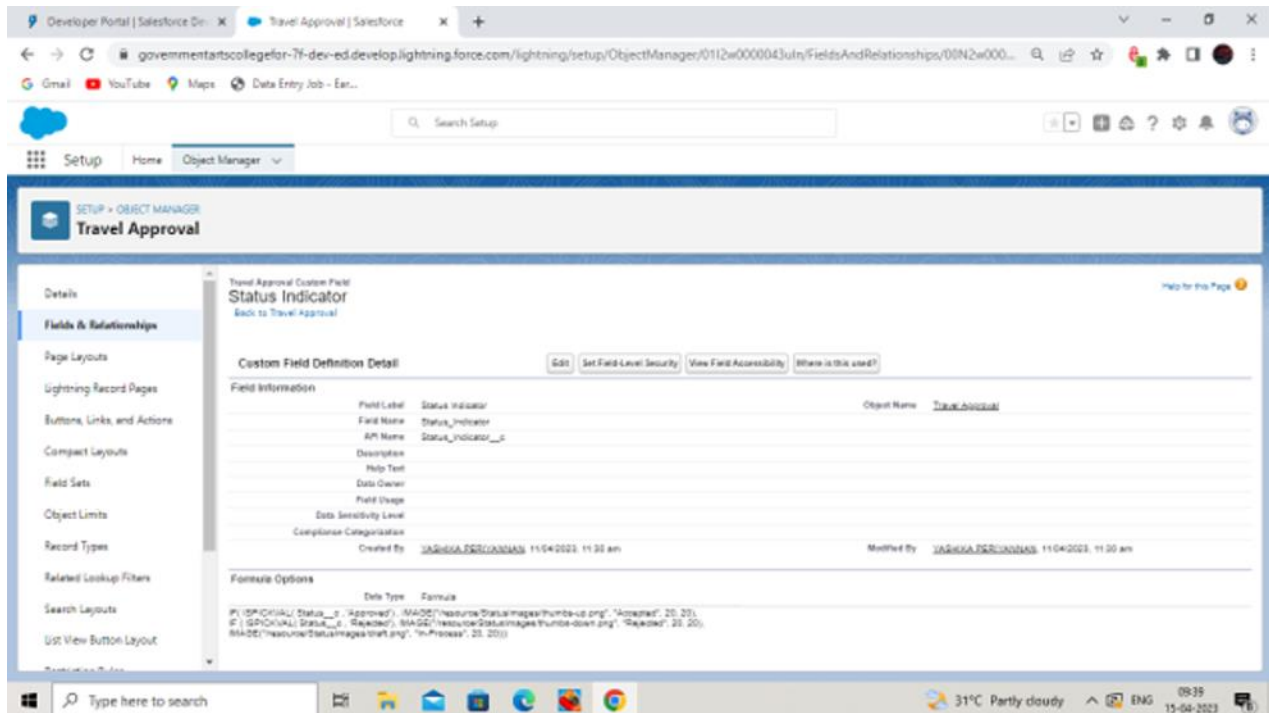


From travel approval object click fields click new. Data type as rollup summary field label as a Expense item. Rollup type sum. Field amount and click save.
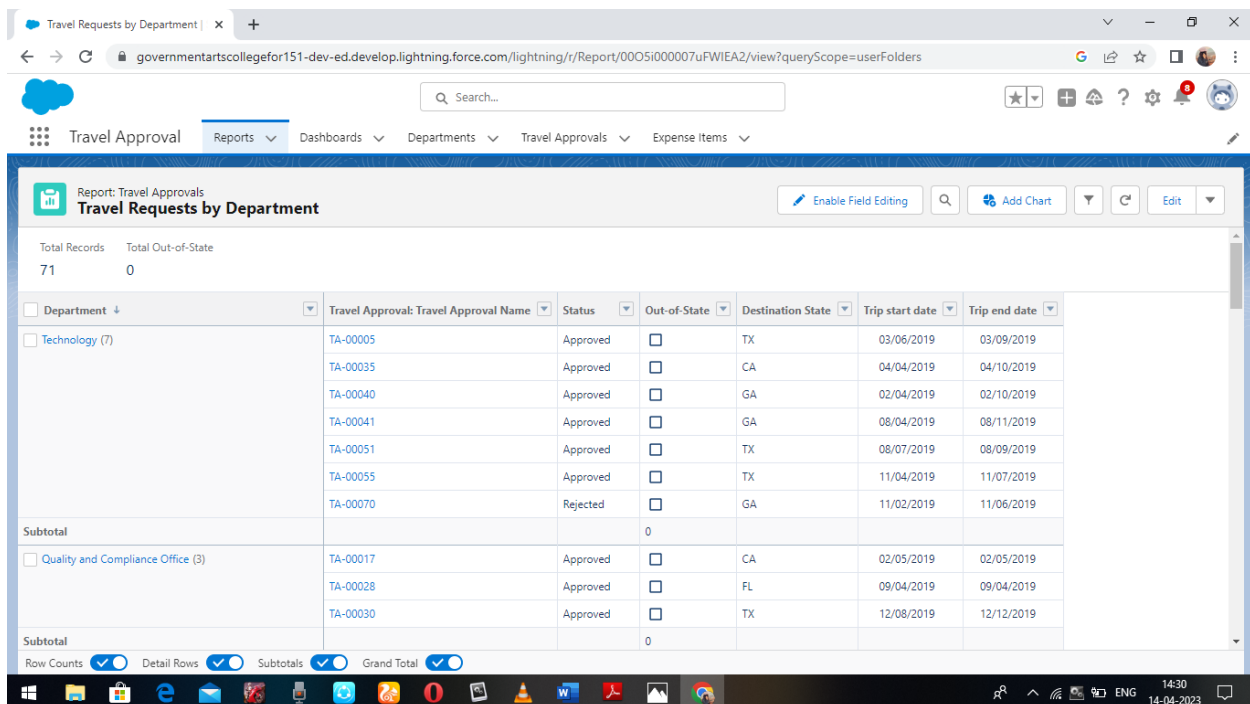
# 3.CREATE FORMULA FIELDS
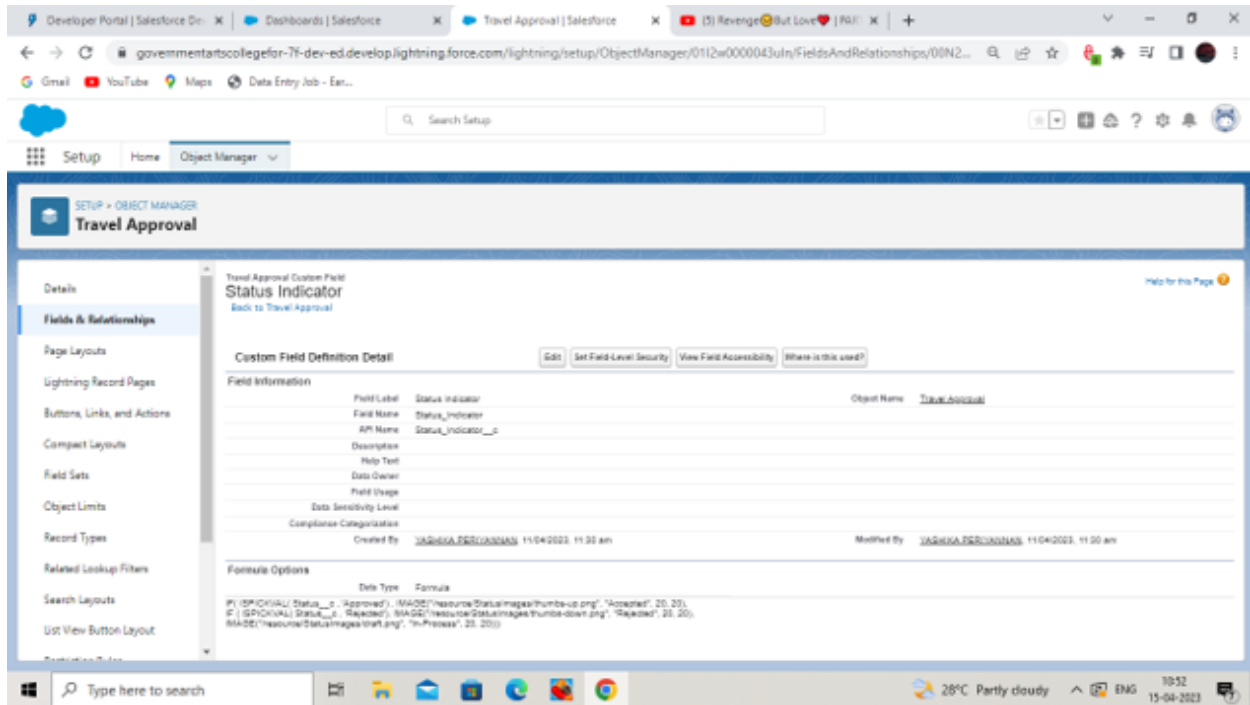


From home tab select static resources click new. Name status images and select the file click save. And create a status indicator field in travel approval object. Data type as a formula. Enter the status formula and click save.

# 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.

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.
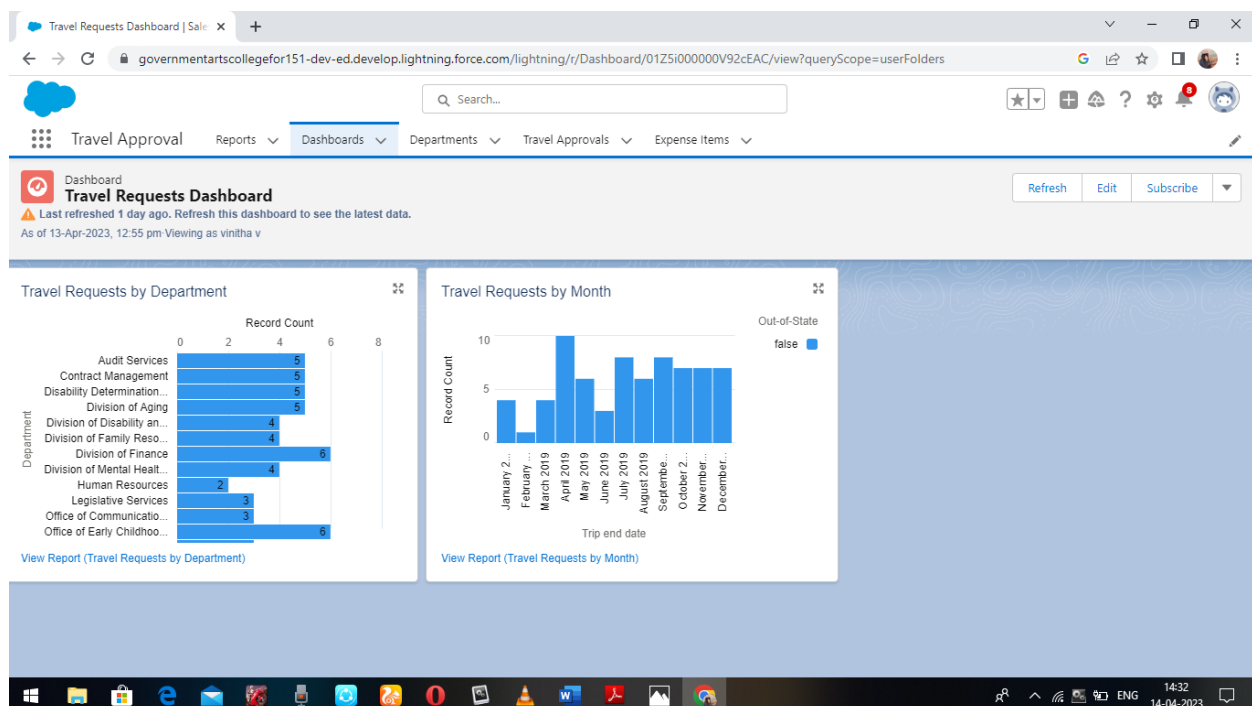


Click on dashboard tab from the travel approval application, click new dashboard and give dashboard name, click +component select report which you created for the data visualization select any of the chart, table etc…

# 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.