

Project flow :

The primary goal of the Employee Travel Approval Application in Salesforce for corporates is to optimize and streamline the management of employee travel requests and approvals. The project aims to provide a user-friendly and efficient solution that automates approval workflows, ensures real-time visibility and notifications, and simplifies expense tracking and reimbursement. User training and support are essential for ensuring adoption, and the application should be scalable and highly customizable to meet evolving organizational needs. Overall, the project's focus is on enhancing productivity, cost control, and compliance with corporate policies in the realm of travel management.

Project Scope • User Registration

(Milestone 1):

Establish a registration portal to input and verify employee details, managers, approvers, and administrative personnel.

• Tabs Creation (Milestone 2):

Tabs will be configured to segment and simplify access to different sections of the application, such as travel requests, approvals, feedback, and reporting.

• App Creation (Milestone 3):

The Employee Travel Approval Application will be launched, serving as the primary hub for submitting, reviewing, and approving corporate travel.

• Fields & Relationships (Milestone 4):

Custom fields and relationships will be defined to capture travel details like destination, dates, expenses, and justifications. Relationships between employees, managers, and travel modules will be structured to streamline the approval chain.

• Profile Configuration (Milestone 5):

User profiles will be set up to dictate roles, access permissions, and interaction levels within the application.

• Role and Role Hierarchy (Milestone 6):

The platform will structure role-based access controls to specify who can view, edit, or approve travel requests, with hierarchies such as junior employees, senior employees, team leads, and department heads.

• Users Management (Milestone 7):

Users will be added and configured based on their roles within the organization. This step involves determining the

Sharing Rules (Milestone 8):

Predefined criteria will inform sharing rules, ensuring data is appropriately shared and accessed, maintaining confidentiality where needed.

• User Adoption Strategies (Milestone 9):

Tools, training sessions, and guides will be introduced to ensure users can efficiently utilize the application. Feedback loops will be set up to continually enhance user experience.

• Reports Generation (Milestone 10):

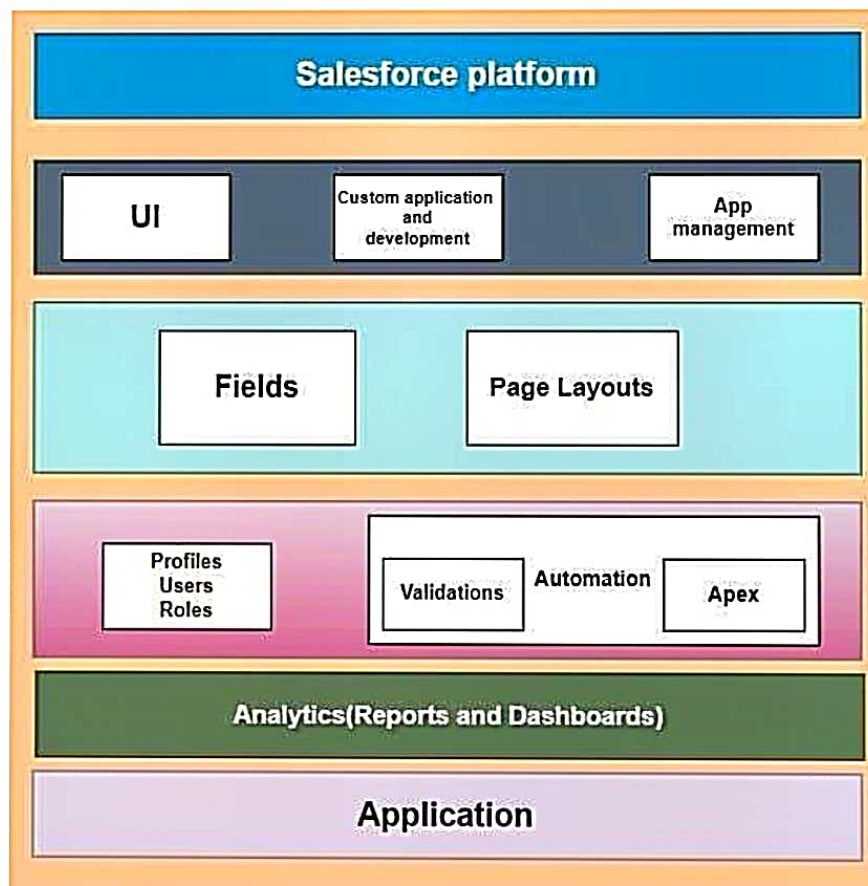
Custom reports will be developed, offering stakeholders insights into travel trends, expenses, approval durations, and policy adherence.

• Dashboards Development (Milestone 11):

Visual dashboards will be designed, showcasing KPIs, travel analytics, and summary reports for a swift overview and decision-making.

- The project is set to deliver a unified solution for corporates, turning the travel approval process into a strategic, transparent, and efficient function.

2.3 Technical Requirements



2.4 Functional Requirements

- **User Registration and Authentication:** Provide a registration

and login system for employees, approvers, and administrators to access the application securely.

- **Travel Request Submission:** Allow employees to submit travel requests, providing essential details such as travel dates, destinations, purpose, and estimated expenses.
- **Customizable Approval Workflows:** Support the configuration of approval workflows, including the ability to set approval criteria, create multi-level approval hierarchies, and define routing rules.
- **Real-time Notifications:** Automate email notifications to keep employees informed about the status of their travel requests and notify approvers when their input is required.
- **Expense Tracking:** Enable employees to record and track travel-related expenses, categorizing them for easy reference and reimbursement.
- **Approval Management:** Provide a dashboard for approvers to review and approve travel requests, with the ability to leave comments or request additional information.
- **Reporting and Analytics:** Offer a suite of reporting tools to generate insights into travel expenses, approval trends, and policy compliance. These reports should be customizable and accessible to authorized users.
- **Mobile Accessibility:** Ensure that the application is accessible on mobile devices, allowing users to submit requests and perform approvals on the go.
- **Security and Access Control:** Implement robust security measures and role-based access control to protect sensitive travel data and ensure that only authorized personnel can access, edit, and approve travel requests.
- **Integration Capabilities:** Support integration with other corporate systems, such as accounting and HR software, to streamline expense tracking, data sharing, and synchronization of travel data.
- **User Training and Support:** Provide training materials and support resources for users and approvers to ensure they can navigate and utilize the application effectively.
- **Scalability and Customization:** Design the application to be highly scalable, allowing it to adapt to the evolving needs of the organization. Ensure it can be customized to accommodate specific workflows and policies.
- **Compliance Features:** Include features to ensure compliance with corporate and regulatory policies, including the ability to capture and store necessary documentation for audits.
- **Budget Management:** Implement tools for tracking and managing travel budgets, helping organizations stay within financial limits.

- **Expense Reimbursement:** Facilitate the expense reimbursement process by allowing approvers to verify expenses and trigger reimbursement to employees.
- **User Profiles and Roles:** Define user profiles and roles to determine who can perform specific actions within the application.
- **Approval History and Audit Trail:** Maintain an audit trail and history of all travel requests, approvals, and changes for transparency and accountability.
- **Notifications and Reminders:** Send automated reminders and notifications to users for pending actions, approvals, and upcoming trips.
- **Document Management:** Provide a repository for storing travelrelated documents, such as itineraries, receipts, and approvals.
- **Multi-platform Support:** Ensure compatibility with various web browsers and devices, enhancing user accessibility.

3.PREPARATION DATA MODELING

Objects:

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types:

1.Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

In This Application We Use 9 Standard Objects:

1. Account
2. Contact.
3. Opportunity
4. Lead.
5. Case
6. Task and Event
7. User
8. Product
9. Custom Object.

2.Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application

In This Application We Use 5 Custom Objects:

1. Employee Details
2. Expense
3. Expense Item
4. Travel Approval