Functional & Technical Requirements

Functional Requirements

FR No.	Functional Requirement (Epic)	Sub Requirement (Story / Sub-Task)
FR-1	User Management	**User Registration:** Allow employees to register and log into the system. **User Roles:** Define roles (employees, managers, travel administrators) with different permissions. **User Profiles:** Capture and manage user profiles, including contact details.
FR-2	Travel Request Submission	**Travel Request Form:** Provide an intuitive form for employees to submit travel requests. **Expense Entry:** Allow users to enter estimated expenses, including flights, accommodation, meals, and incidentals. **Travel Dates:** Specify departure and return dates, including the option for flexible schedules. **Attachments:** Enable the attachment of supporting documents, such as itineraries or conference detail
FR-3	Approval workflow	**Workflow Automation:** Implement an automated approval process with defined workflows. **Manager Assignment:** Automatically route requests to the appropriate manager based on criteria like department or project. **Notifications:** Send notifications to managers and employees at various stages of the approval process. **Delegation**: Allow managers to delegate their approval authority when they are unavailable.
FR-4	Approval Management	**Manager Dashboard**: Provide managers with a dashboard to view and manage pending travel requests. **Request Review:** Allow managers to review travel details, expense estimates, and supporting documents. **Approval/Rejection:** Enable managers to approve or reject requests with comments. **Escalation:** Implement escalation processes for unattended requests or those exceeding certain thresholds

FR-5	Expense Tracking	**Expense Tracking:** Record actual expenses incurred during the trip. **Receipt Upload:** Allow users to upload expense receipts for verification. **Expense Categories:** Categorize expenses (e.g., transportation, lodging, meals) for reporting. **Expense Reconciliation:** Compare estimated and actual expenses for cost control.
FR-6	Reporting and Analytics	**Reporting Tools:** Develop custom reports and dashboards to monitor travel request status and expenses. **Analytics:** Implement data analytics for insights into travel patterns, expenses, and approval efficiency. **Export:** Allow users to export reports for offline use or sharing

Technical Requirements

TR No.	Technical Requirement	Description
TR-1	Salesforce Environment	Utilize Salesforce's Enterprise or Unlimited edition to ensure scalability and access to advanced features.
TR-2	Development language	Develop using Salesforce's proprietary programming language, Apex, for server-side logic.
TR-3	Security	- Implement role-based access control (RBAC) to control who can access and modify data. - Encrypt sensitive data both in transit and at rest. - Utilize Salesforce Shield for enhanced security, including event monitoring and field-level encryption.
TR-4	Integration	- Use REST and SOAP APIs for integration with external systems, such as finance and expense management tools. - Implement Single Sign-On (SSO) solutions for seamless and secure access.
TR-5	Customization	Allow administrators to customize and configure the application, including approval workflows, fields, and user profiles.
TR-6	Mobile Accessibility	- Ensure that the application is accessible via the Salesforce mobile app for on-the-go request submission and tracking. - Develop a custom mobile app using Salesforce Mobile SDK for more tailored mobile functionality.