

# Corporate Travel & Expense Management System Project

---

## Phase 1: Problem Understanding & Industry Analysis

◆ **Project Overview:** This project aims to build a Salesforce solution that simplifies corporate travel and expense management by replacing manual emails and spreadsheets with automated workflows, ensuring faster approvals, policy compliance, and real-time expense insights.

### 1. Requirement Gathering

- Talk to stakeholders (employees, line managers, finance officers, HR).
- Example requirements:
  - Allow employees to submit travel requests (e.g., flight booking, hotel stay).
  - Track expense claims with receipt uploads.
  - Managers should be able to approve/reject requests.
  - Prevent claims from exceeding company budget policies.
  - Generate monthly reimbursement reports per department.

### 2. Stakeholder Analysis

- **Admin** (you, managing system setup): Configure Salesforce org, manage user roles, and maintain workflows.
- **Employees** (submitters): Create and submit travel requests and expense claims.
- **Managers** (approvers): Approve/reject high-value travel requests and monitor expense reports.
- **Finance Team** (processors): Verify claims, process reimbursements, and ensure compliance.

- **HR/Support** (issue handlers): Resolve employee travel-related queries and manage travel policy adherence.

### 3. Business Process Mapping

- Draw a flow:

Employee submits travel/expense request → Automated workflow routes to Manager → Manager approves/rejects → Finance verifies and processes reimbursement → HR tracks compliance → Dashboard auto-updates for management.

### 4. Industry-specific Use Case Analysis

- In the corporate world, travel and expenses impact budgets, compliance, and employee satisfaction.
- So, we need to:
  - Track all **travel requests and expense claims** centrally.
  - Automate **approval flows** to prevent policy violations.
  - Ensure **finance compliance** with audit-ready records.
  - Notify employees and managers about **status updates** (approved, rejected, reimbursed).
  - Provide management with **real-time dashboards** for better cost control.

### 5. AppExchange Exploration

- Look for “**Travel & Expense Management**” apps. Some exist (like Concur, Expensify, FinancialForce), but we’ll build a **simpler custom solution** in Salesforce to learn the end-to-end implementation process.
-