


Corporate Travel & Expense Management System Project

Phase 3: Data Modelling & Relationships

 **Goal:** Design the data structure (objects, fields, and relationships) for Travel & Expense.

1. Standard & Custom Objects

- **Standard:** User (Employees, Managers, Finance).
- **Custom:**
 - ✓ Travel Request (parent)
 - ✓ Expense Claim (child)

SETUP > OBJECT MANAGER

Travel Request

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

Restriction Rules

Details

Description

API Name

Travel_Request__c

Custom

✓

Singular Label

Travel Request

Plural Label

Travel Requests

Enable Reports

✓

Track Activities

✓

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

SETUP > OBJECT MANAGER

Expense Claim

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

Restriction Rules

Scoping Rules

Details

Description

API Name
Expense_Claim__c

Custom
✓

Singular Label
Expense Claim

Plural Label
Expense Claims

Enable Reports
✓

Track Activities
✓

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

EditDelete

2. Fields

- *Travel Request*
 - Purpose (Picklist)
 - Start Date (Date)
 - End Date (Date)
 - Estimated Cost (Currency / Formula if auto-calculated)
 - Status (Picklist: Submitted, Approved, Rejected, Completed)

Travel Request

Details

Fields & Relationships

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Scoping Rules

Fields & Relationships

13 Items, Sorted by Field Label

Q Quick Find

Destination	Destination_State__c	Picklist
End Date	End_Date__c	Date
Estimated Cost	Estimated_Cost__c	Formula (Currency)
Expense Claim	Expense_Claim__c	Lookup(Expense Claim)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Purpose	Purpose_of_Trip__c	Picklist
Start Date	Start_Date__c	Date
Status of Travel	Status_of_Travel__c	Picklist
Total Claimed	Total_Claimed__c	Roll-Up Summary (SUM Expense Claim)

○ *Expense Claim*

- Travel Request (Lookup → Travel Request)
- Category (Picklist: Travel, Hotel, Meals, Misc, Other)
- Amount (Currency)
- Date (Date)
- Status (Picklist: Submitted, Approved, Reimbursed, Rejected)
- Receipt (Files Related List)

Cloud logo | Search Setup | Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Expense Claim

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 | Restriction Rules | Scoping Rules

Fields & Relationships
9 Items, Sorted by Field Label

Q, Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(16, 2)		
Category	Category__c	Picklist		
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		
Expense Claim Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Receipt Upload	Receipt_Upload__c	URL(255)		
Status	Status__c	Picklist		
Travel Request	Travel_Request__c	Master-Detail(Travel Request)		✓

3. Record Types

- **Travel Request** → “Employee Request” vs “Manager Review”.
- **Expense Claim** → “Standard Claim” vs “High-Value Claim” (Finance approval required).

Cloud logo | Search Setup | Setup | Home | Object Manager

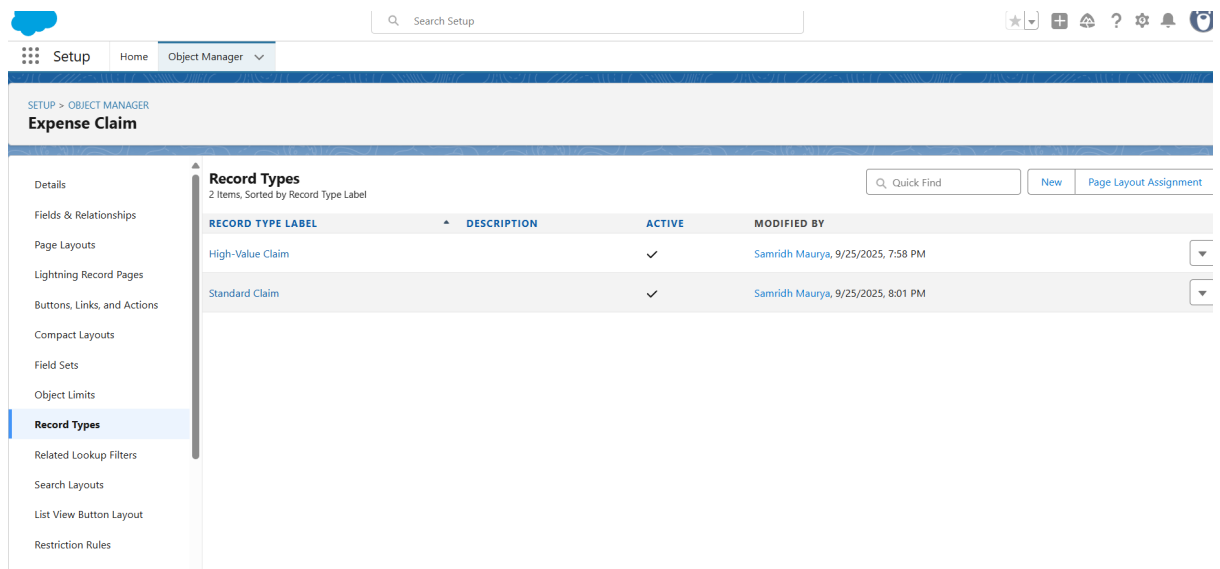
SETUP > OBJECT MANAGER
Travel Request

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 | Restriction Rules | Scoping Rules

Record Types
2 Items, Sorted by Record Type Label

Q, Quick Find | New | Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Employee Request		✓	Samridh Maurya, 9/25/2025, 7:45 PM
Manager Review		✓	Samridh Maurya, 9/25/2025, 7:47 PM

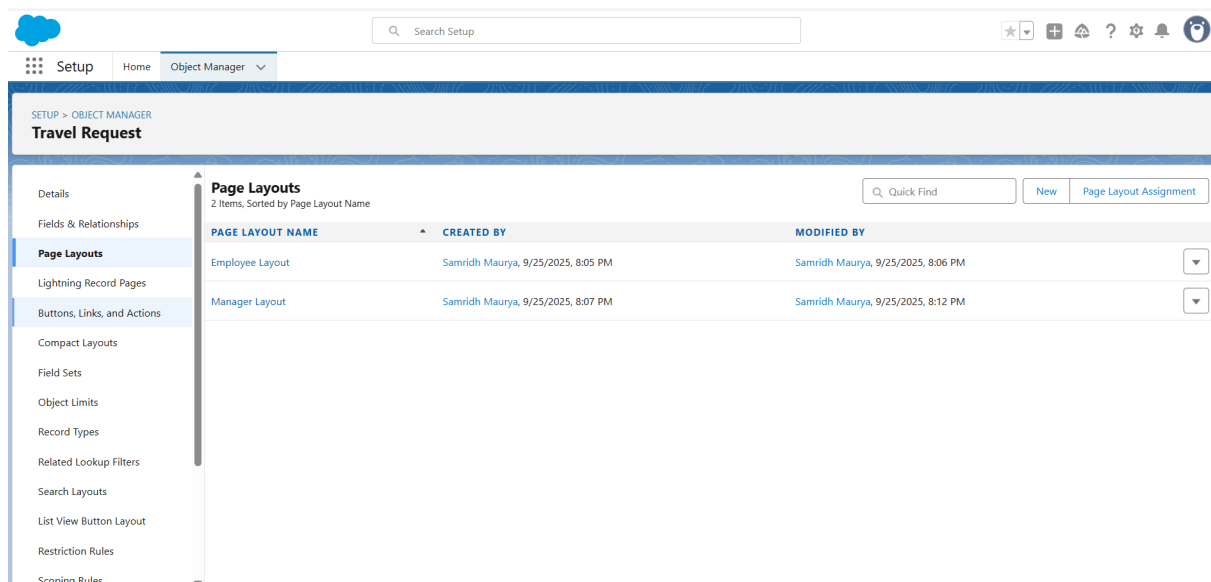


The screenshot shows the Salesforce Setup interface for the 'Expense Claim' object. The left sidebar lists various setup options, with 'Record Types' selected. The main content area displays a table of record types for 'Expense Claim'.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
High-Value Claim		✓	Samridh Maurya, 9/25/2025, 7:58 PM
Standard Claim		✓	Samridh Maurya, 9/25/2025, 8:01 PM

4. Page Layouts

- **Employee layout** → Simple fields (Purpose, Dates, Cost).
- **Manager layout** → Includes approval section & variance.
- **Finance layout** → Shows expense claims, reimbursement details.



The screenshot shows the Salesforce Setup interface for the 'Travel Request' object. The left sidebar lists various setup options, with 'Page Layouts' selected. The main content area displays a table of page layouts for 'Travel Request'.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Employee Layout	Samridh Maurya, 9/25/2025, 8:05 PM	Samridh Maurya, 9/25/2025, 8:06 PM
Manager Layout	Samridh Maurya, 9/25/2025, 8:07 PM	Samridh Maurya, 9/25/2025, 8:12 PM

5. Compact Layouts

- ***Travel Request*** → Purpose, Start Date, Status, Estimated Cost.
- ***Expense Claim*** → Category, Amount, Status.

The image displays two screenshots of the Salesforce Schema Builder interface, specifically the 'Compact Layouts' section for two objects: 'Expense Claim' and 'Travel Request'.

Expense Claim Compact Layout:

- Object Name:** Expense Claim
- Label:** Expense Claim Compact
- API Name:** Expense_Claim_Compact
- Included Fields:** Amount, Category, Status
- Created By:** Samridh Maurya, 9/25/2025, 8:25 PM
- Modified By:** Samridh Maurya, 9/25/2025, 8:25 PM

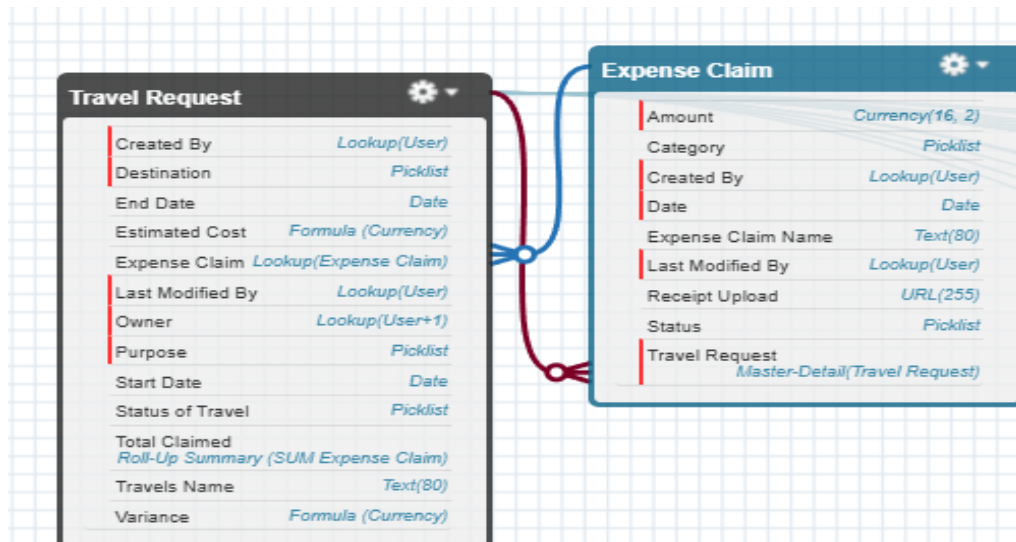
Travel Request Compact Layout:

- Object Name:** Travel Request
- Label:** Travel Request Compact
- API Name:** Travel_Request_Compact
- Included Fields:** Start Date, Purpose, Status of Travel, Estimated Cost
- Created By:** Samridh Maurya, 9/25/2025, 8:22 PM
- Modified By:** Samridh Maurya, 9/25/2025, 8:22 PM

Both screenshots show a sidebar with navigation options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, **Compact Layouts** (selected), Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.

6. Schema Builder

- **Travel Request (Parent)** → Expense Claim (Child, Lookup).
- **Lookup field required** → no orphan expense claims



7. Lookup vs Master-Detail

- Use **Lookup** (not Master-Detail).
 - **Reason:** Expense Claims may need independent sharing/security while linked to a Travel Request.

8. Junction Objects

- Not needed now.
- Could be used later if:
 - One claim links to multiple travel requests.
 - A request is split into multiple budget allocations.

9. External Objects

- If finance uses an **ERP/Accounting system**, link via Salesforce Connect.

- Example: sync reimbursement status from ERP into Expense Claim records.
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