


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).
- **Travel Request** (custom object, `Travel_Request__c`).
- **Expense Claim** (custom object, `Expense_Claim__c`).

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

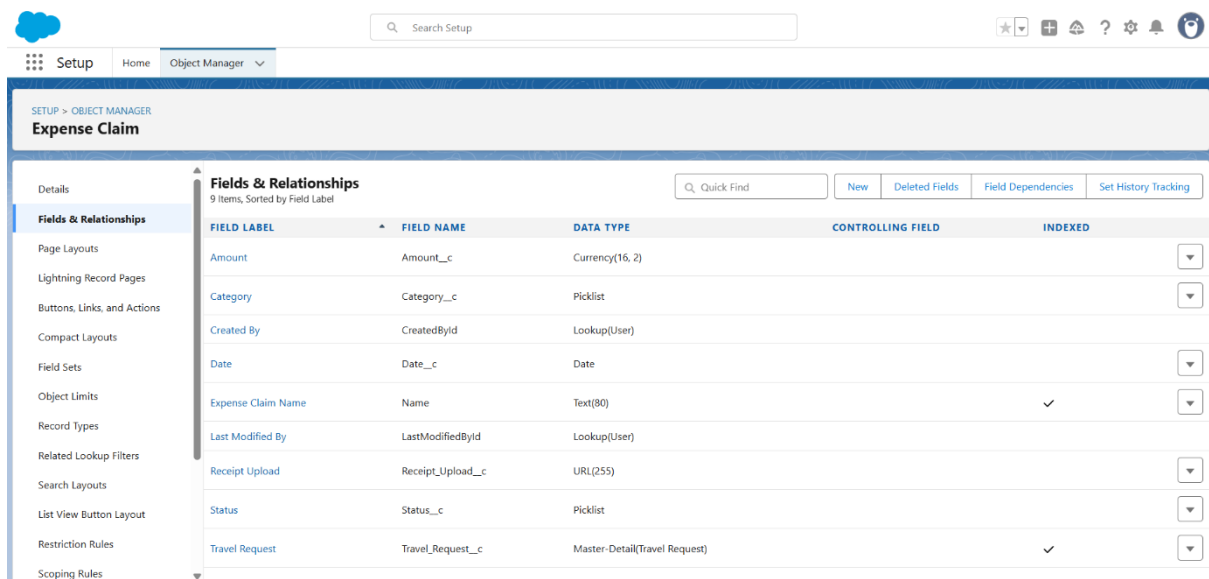
2. Fields

- *Travel Request (Travel_Request__c)*
 - Purpose → Picklist (**Purpose__c**).
 - Start Date → Date (**Start_Date__c**).
 - End Date → Date (**End_Date__c**).
 - Estimated Cost → Currency/Formula (**Estimated_Cost__c**).
 - Status → Picklist (**Status_of_Travel__c**, with values: Submitted, Approved, Rejected, Completed).

SETUP > OBJECT MANAGER			
Travel Request			
Details	Fields & Relationships 13 Items, Sorted by Field Label		
Fields & Relationships	<input type="text" value="Quick Find"/>		
Page Layouts	Destination	Destination_State__c	Picklist
Lightning Record Pages	End Date	End_Date__c	Date
Buttons, Links, and Actions	Estimated Cost	Estimated_Cost__c	Formula (Currency)
Compact Layouts	Expense Claim	Expense_Claim__c	Lookup(Expense Claim)
Field Sets	Last Modified By	LastModifiedById	Lookup(User)
Object Limits	Owner	OwnerId	Lookup(User,Group)
Record Types	Purpose	Purpose_of_Trip__c	Picklist
Related Lookup Filters	Start Date	Start_Date__c	Date
Search Layouts	Status of Travel	Status_of_Travel__c	Picklist
List View Button Layout	Total Claimed	Total_Claimed__c	Roll-Up Summary (SUM Expense Claim)
Restriction Rules			
Scoping Rules			

- *Expense Claim (Expense_Claim__c)*
 - Travel Request → Lookup to Travel_Request
(**Travel_Request__c**).

- Category → Picklist (**Category__c**, values: Travel, Hotel, Meals, Misc, Other).
- Amount → Currency (**Amount__c**).
- Date → Date (**Date__c**).
- Status → Picklist (**Status__c**, values: Submitted, Approved, Reimbursed, Rejected).
- **Receipt Upload** → Files Related List (standard Salesforce ContentDocumentLink).



The screenshot shows the Salesforce Setup interface for the 'Expense Claim' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Amount (Currency), Category (Picklist), Created By (Lookup), Date (Date), Expense Claim Name (Text), Last Modified By (Lookup), Receipt Upload (URL), Status (Picklist), and Travel Request (Master-Detail).

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 (Travel_Request__c)**
 - ✓ Employee Request → **Employee_Request**
 - ✓ Manager Review → **Manager_Review**
- **Expense Claim (Expense_Claim__c)**

✓ *Standard Claim* → ***Standard_Claim***

✓ *High-Value Claim* → ***High_Value_Claim***

The first screenshot shows the 'Travel Request' object in the 'Object Manager' section. The 'Record Types' table lists two active record types: 'Employee Request' and 'Manager Review', both created by Samridh Maurya on 9/25/2025.

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 second screenshot shows the 'Expense Claim' object. The 'Record Types' table lists two active record types: 'High-Value Claim' and 'Standard Claim', both created by Samridh Maurya on 9/25/2025.

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** (Travel_Request__c-Employee_Layout).
- **Manager layout** (Travel_Request__c-Manager_Layout).
- **Finance layout** (Expense_Claim__c-Finance_Layout).

Setup | Home | Object Manager

Search Setup

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

Page Layouts
2 Items, Sorted by Page Layout Name

Q, Quick Find

New

Page Layout Assignment

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*** → Fields: Purpose__c, Start_Date__c, Status__c, Estimated_Cost__c.
- ***Expense Claim*** → Fields: Category__c, Amount__c, Status__c.

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

Expense Claim Compact Layout

[Back to Expense Claim](#)

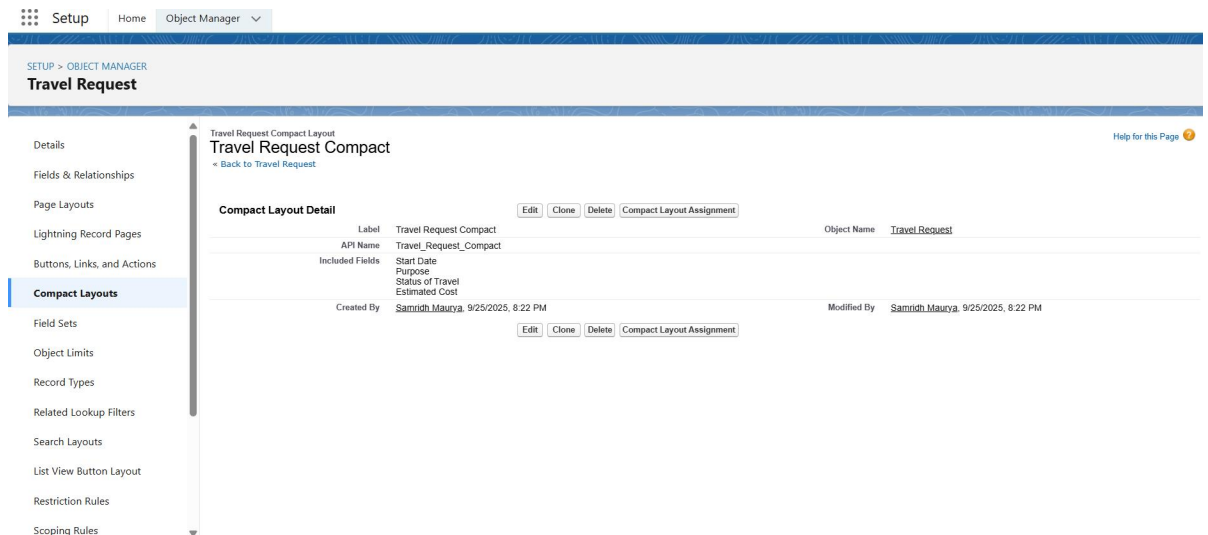
Help for this Page

Compact Layout Detail

Edit Clone Delete Compact Layout Assignment

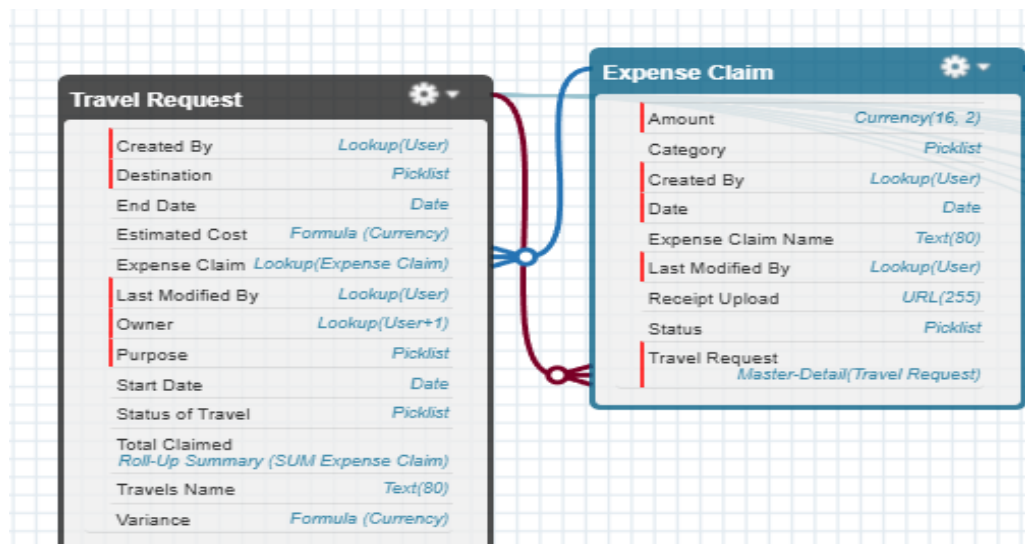
Label	Expense Claim Compact	Object Name	Expense Claim
API Name	Expense_Claim_Compact		
Included Fields	Amount Category Status		
Created By	Samridh Maurya, 9/25/2025, 8:25 PM	Modified By	Samridh Maurya, 9/25/2025, 8:25 PM

Edit Clone Delete Compact Layout Assignment



6. Schema Builder

- **Relationship: Travel_Request__c (Parent) → Expense_Claim__c (Child) via lookup field Travel_Request__c.**
- **Lookup is required → prevents orphan Expense Claims.**



7. Lookup vs Master-Detail

- Implemented as **Lookup Relationship** (Expense_Claim__c.Travel_Request__c).
 - ***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.
-