


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)

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)
- **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)

SETUP > OBJECT MANAGER

Travel Request

Details	Fields & Relationships 13 Items, Sorted by Field Label			Quick Find
Fields & Relationships				
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				

3. Record Types

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

4. Page Layouts

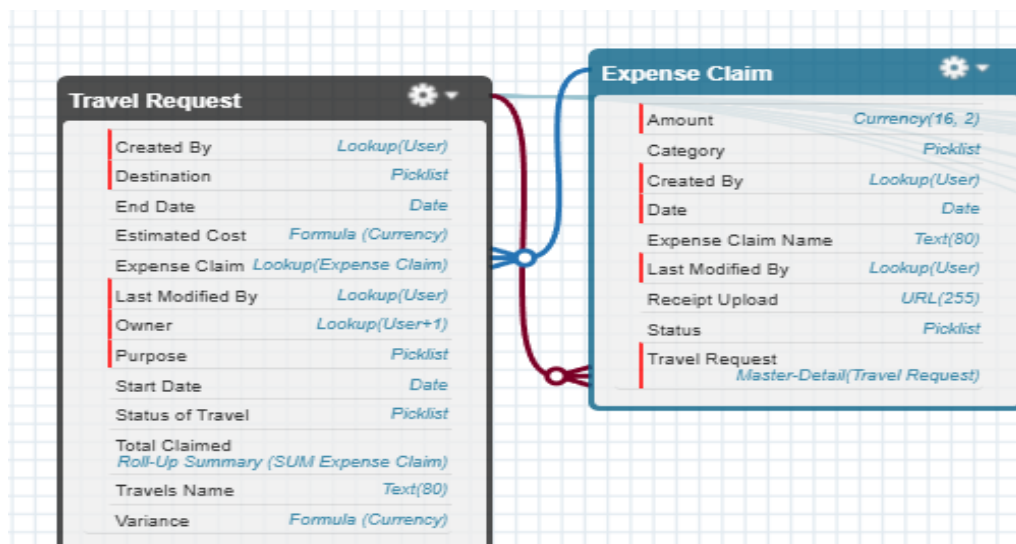
- **Employee layout** → Simple fields (Purpose, Dates, Cost).
- **Manager layout** → Includes approval section & variance.
- **Finance layout** → Shows expense claims, reimbursement details.

5. Compact Layouts

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

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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