Corporate Travel & Expense Management System Project

Project Type: Internal Enterprise CRM Implementation

Target Users: Employees, Managers, Finance Teams

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**. It will enhance **employee experience** with self-service requests, provide **managers visibility** into approvals, empower **finance teams** with audit-ready records, and give **leadership powerful dashboards** for strategic **decision-making**.

1. **Requirement Gathering**

   o Talk to stakeholders (employees, line managers, finance officers, HR).

   o 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**

   o **Admin** (You, managing system setup): Configure Salesforce org, manage user roles, and maintain workflows.

   o **Employees** (Submitters): Create and submit travel requests and expense claims.

o **Managers** (Approvers): Approve/reject high-value travel requests and monitor expense reports.

o **Finance Team** (Processors): Verify claims, process reimbursements, and ensure compliance.

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

3. **Business Process Mapping**

   o 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**

   o In the corporate world, travel and expenses impact budgets, compliance, and employee satisfaction.

   o 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**

   o 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.