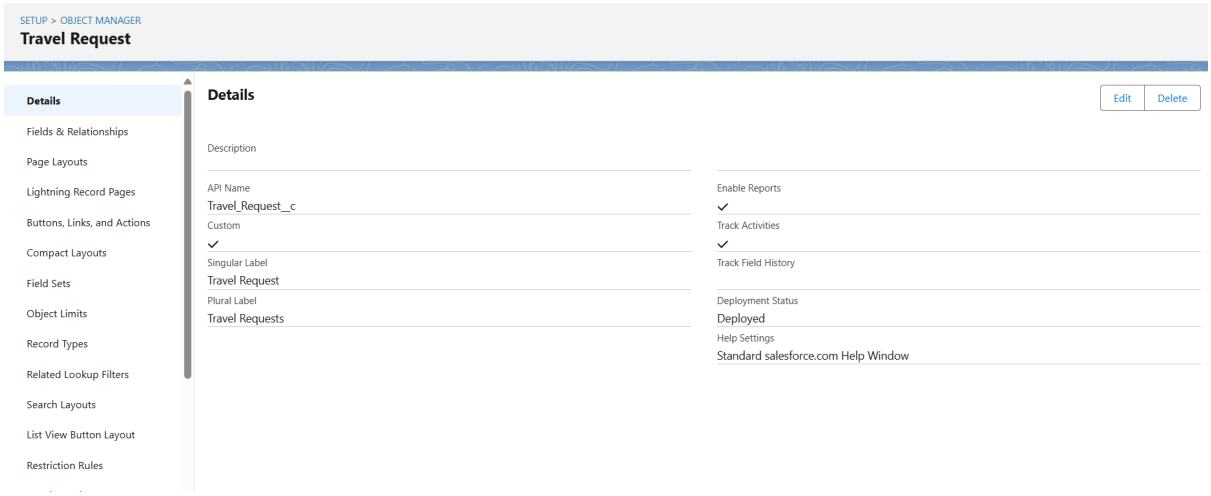
Corporate Travel & Expense Management System Project

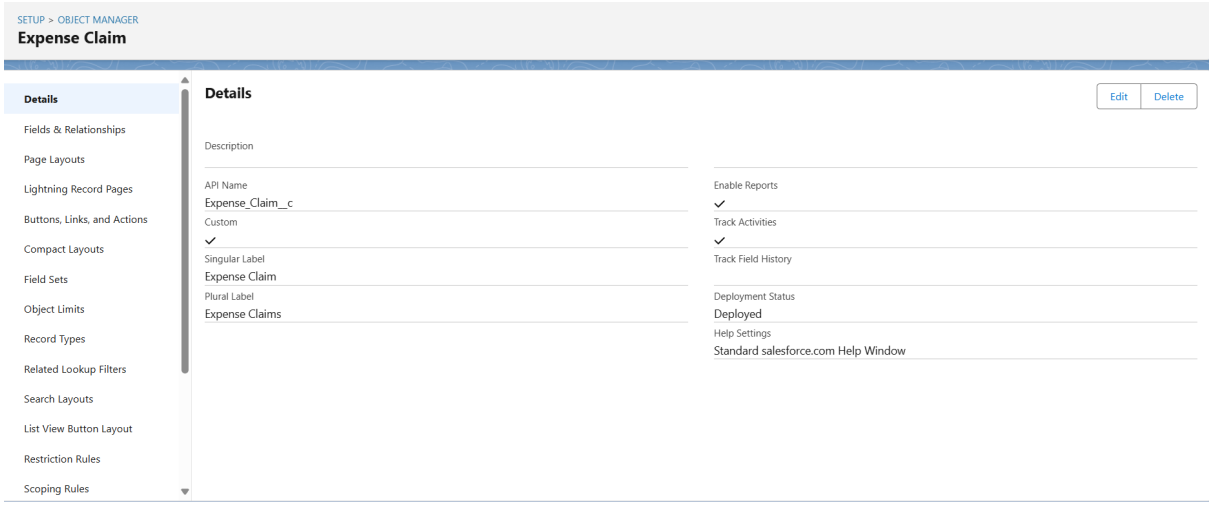
Phase 3: Data Modelling & Relationships

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

1. Standard & Custom Objects

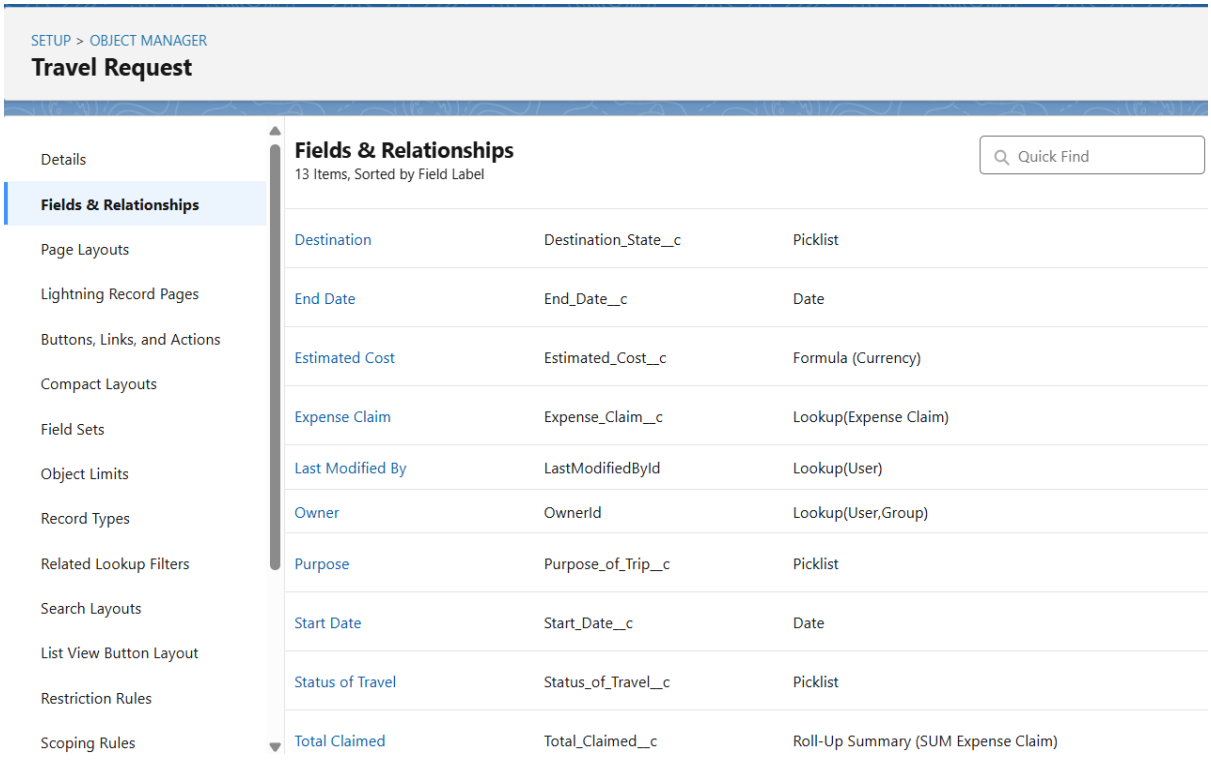
- ***Standard*:** User (Employees, Managers, Finance).
- ***Custom***:
  - ✓ Travel Request (parent)
  - ✓ Expense Claim (child)



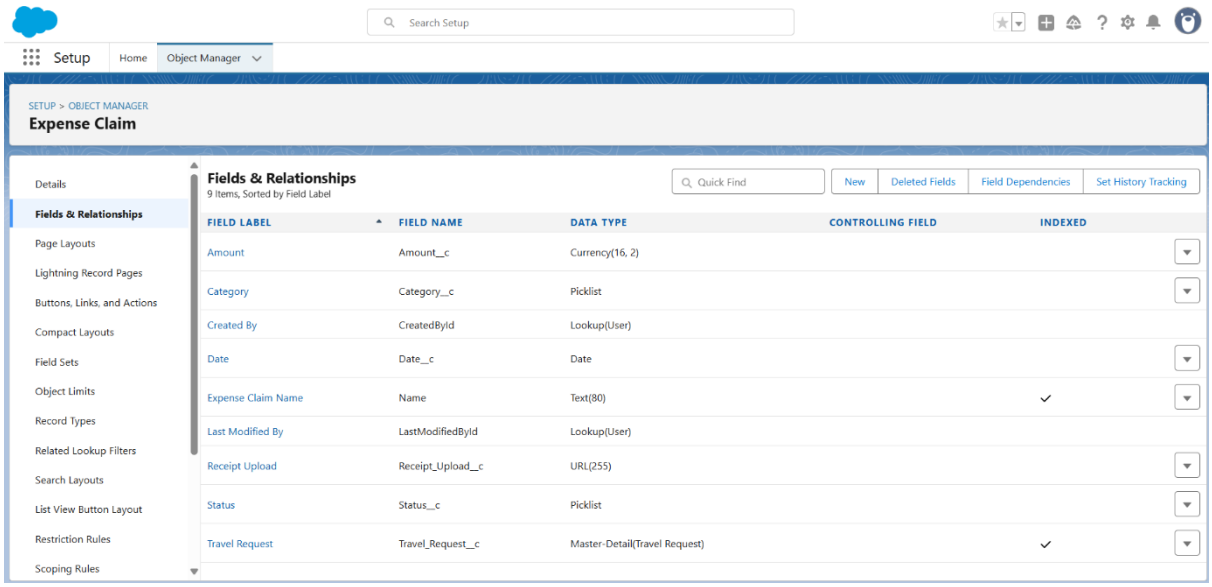


2. Fields

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

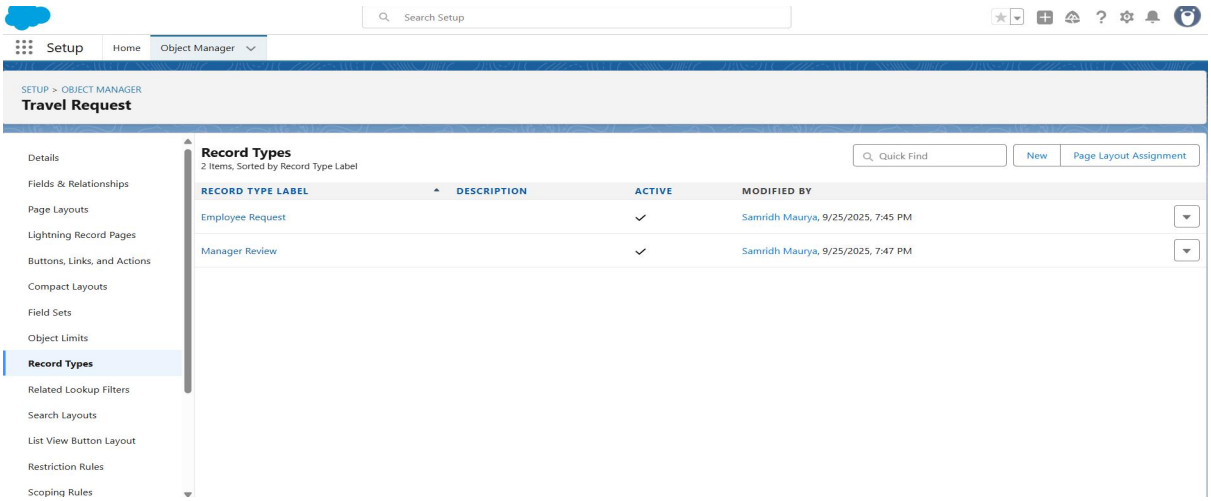


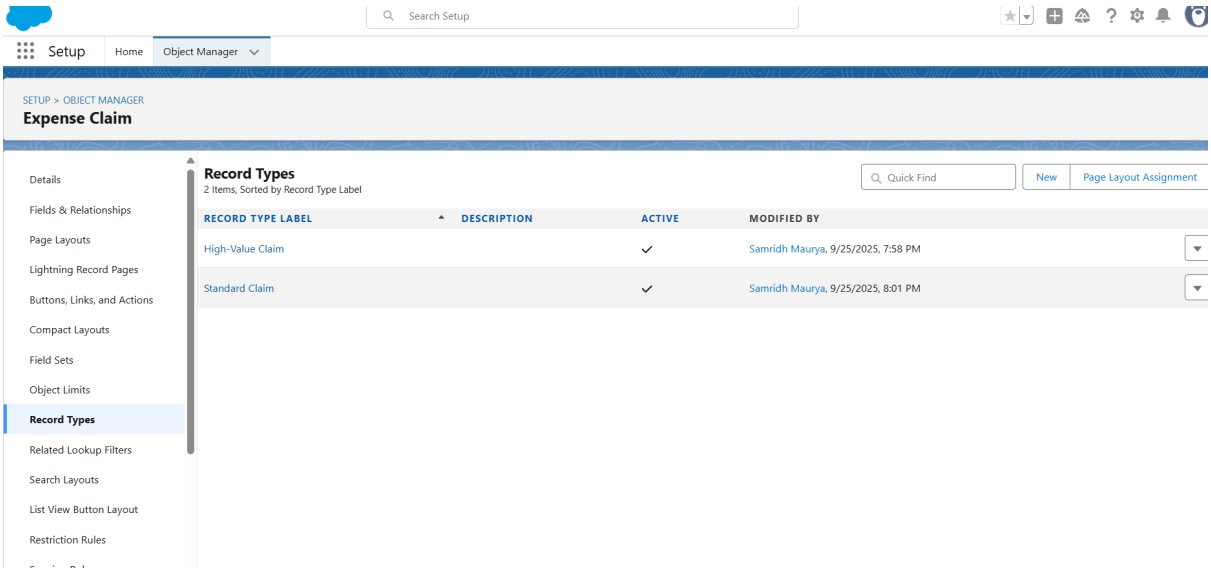
- ***Expense Claim***
  - Travel Request (Lookup → Travel Request)
  - Category (Picklist: Travel, Hotel, Meals, Misc, Other)
  - Amount (Currency)
  - Date (Date)
  - Status (Picklist: Submitted, Approved, Reimbursed, Rejected)
  - Receipt (Files Related List)



3. Record Types

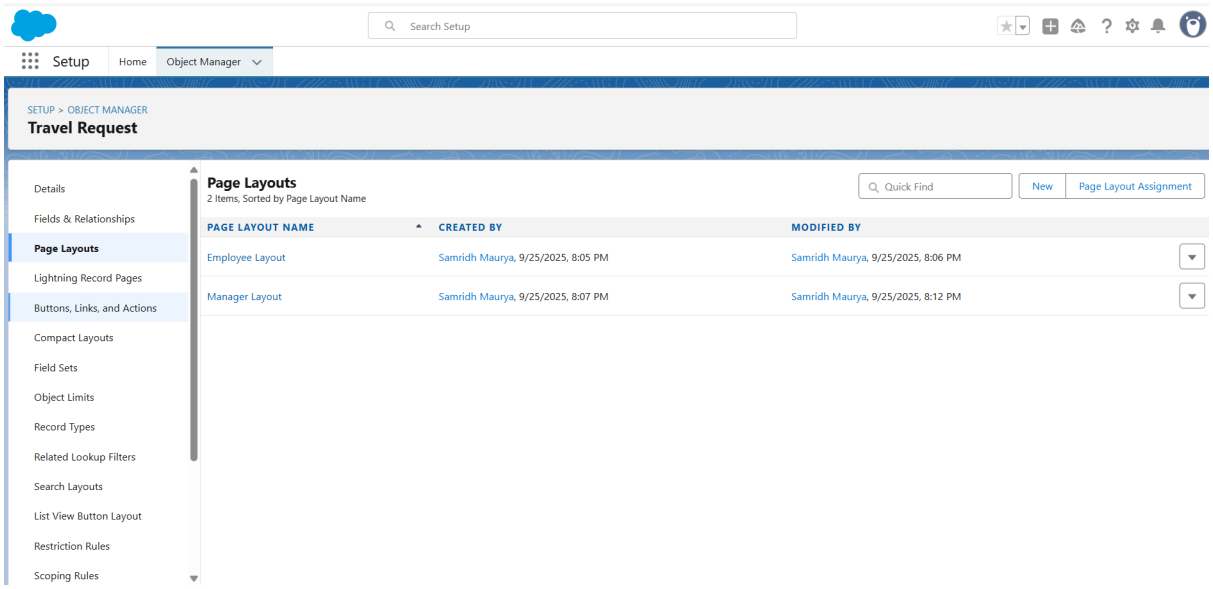
- ***Travel Request*** → "Employee Request" vs "Manager Review".
- ***Expense Claim***→ **"**Standard Claim" vs "High-Value Claim" (Finance approval required).





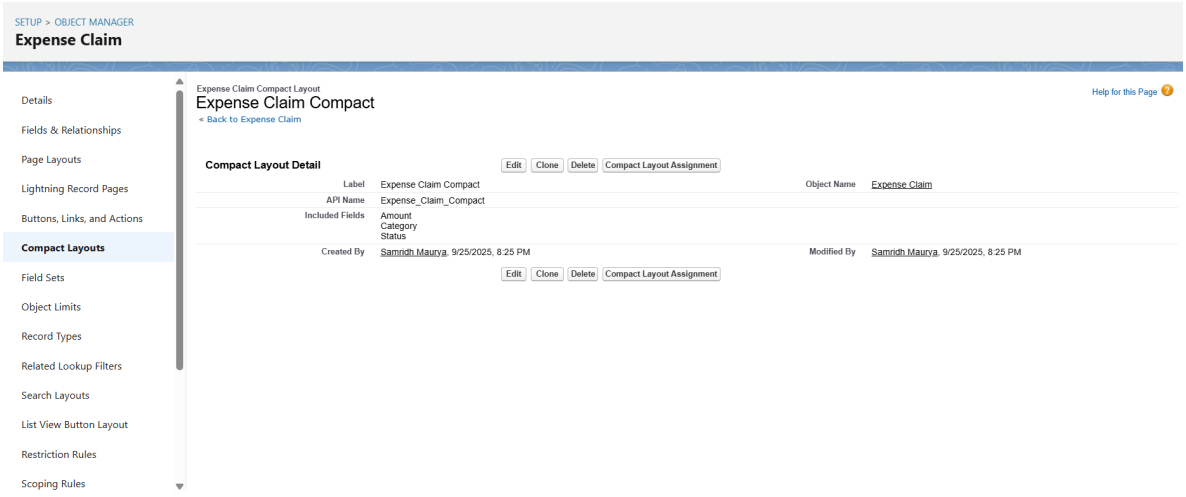
4. Page Layouts

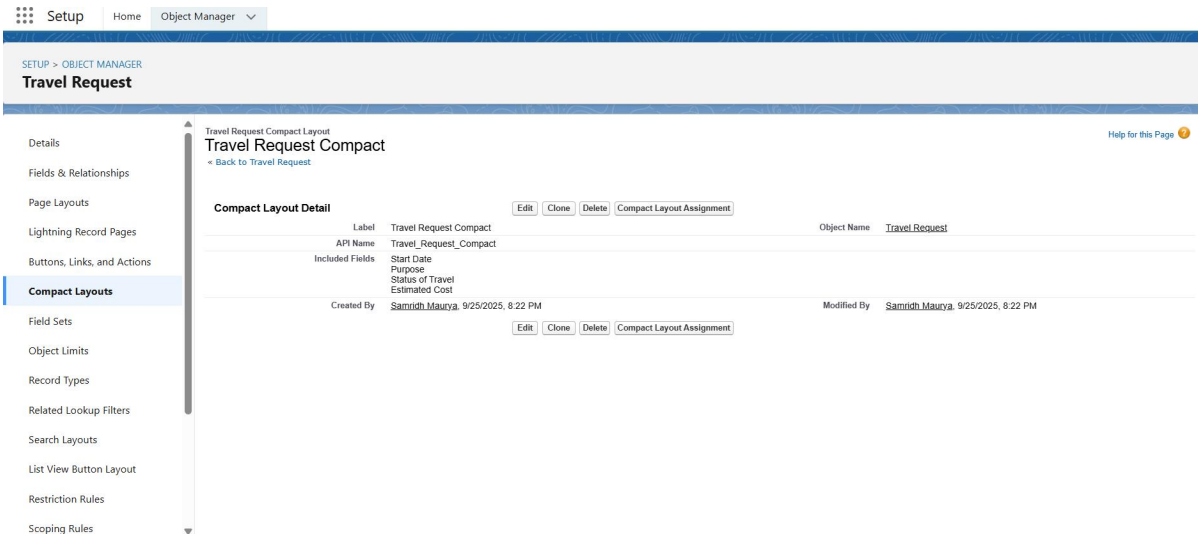
- **Employee layout** → Simple fields (Purpose, Dates, Cost).
- **Manager layout** → Includes approval section & variance.
- **Finance layout** → Shows expense claims, reimbursement details.



5. Compact Layouts

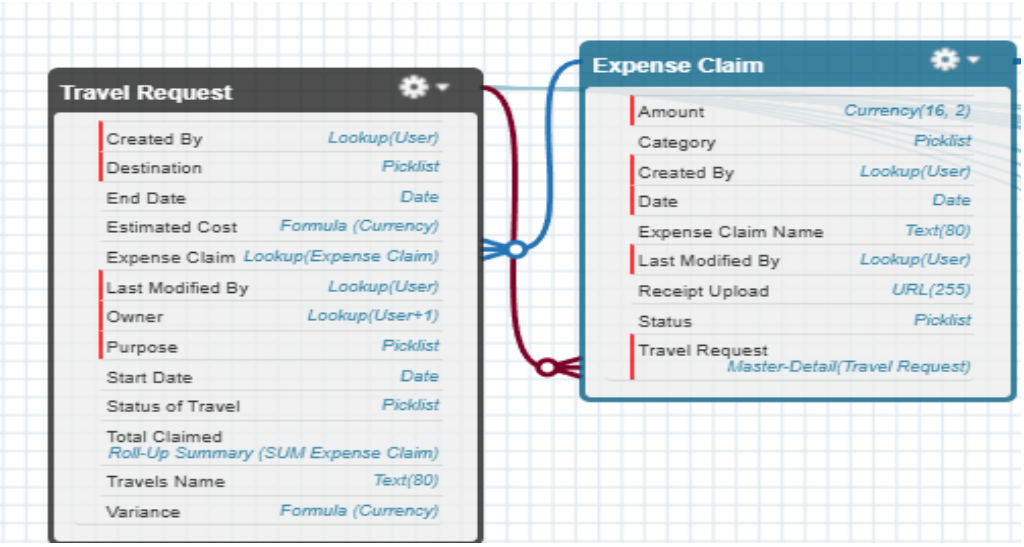
- ***Travel Request*** → Purpose, Start Date, Status, Estimated Cost.
- ***Expense Claim*** → Category, Amount, Status.





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.