
SFT
USER MANUAL

Contents

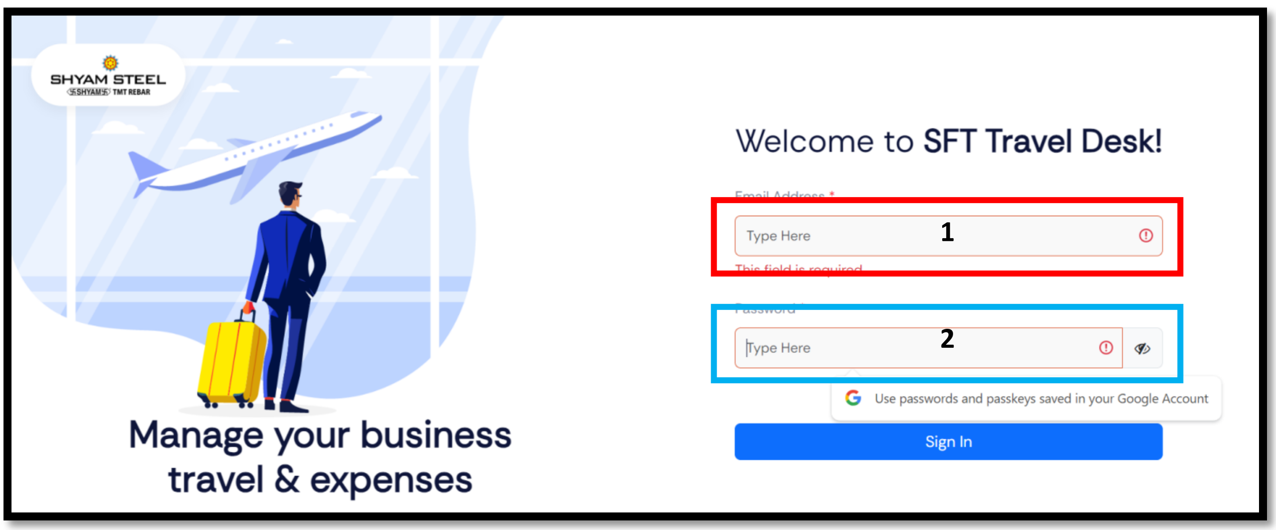
USER MANUAL SFT TRAVEL DESK

Welcome to the SFT Travel Desk, a comprehensive solution designed to manage the entire travel process for employees across the company. Our platform offers a user-friendly dashboard that allows users to keep track of their travel plans, expenses, and approvals. From booking to expense reporting, the SFT Travel Desk streamlines every aspect of business travel, ensuring a seamless and efficient experience for all employees.

1 PRIMARY ENTITIES

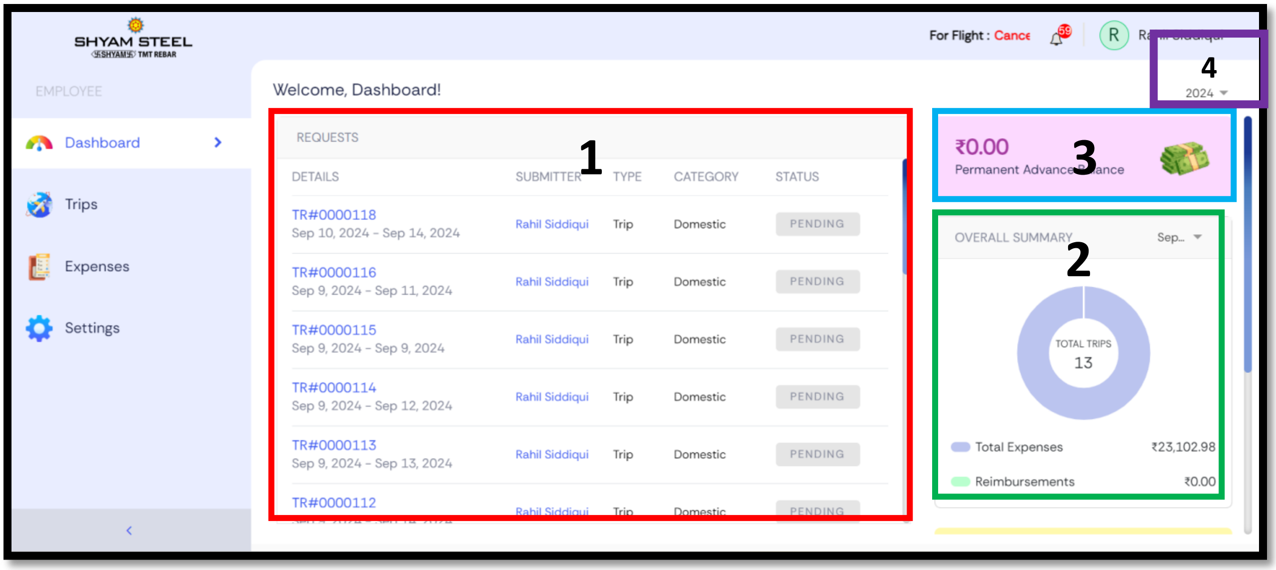
- User-employee
- Admin
- Travel desk manager
- Reporting manager

2 LOGIN



The above image shows the login page that users encounter upon opening their profile. Depending on their role, users can enter their credentials to gain access. Additionally, there is a call to action explaining the login process.

3 DASHBOARD



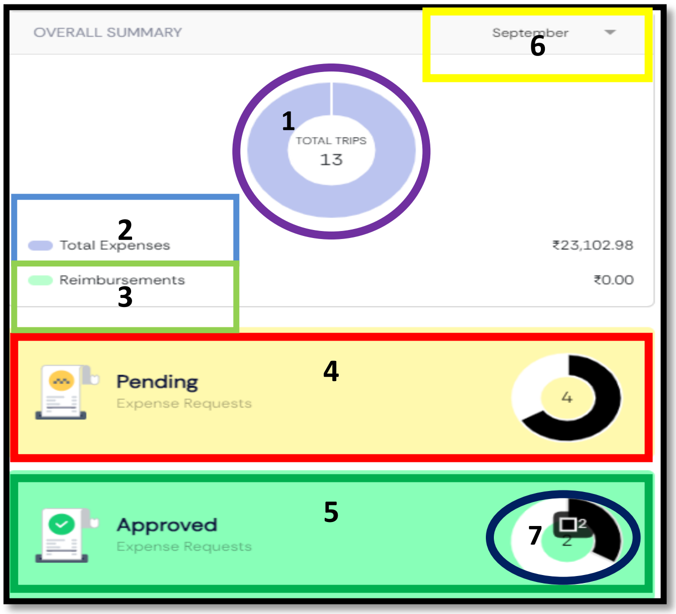
After logging in, the first thing the user encounters is the dashboard page, which contains details about various aspects of their account and activities.

1. previous reimbursement requests
2. Overall summary
3. Permanent advance balance
4. Financial year filter

3.1 Requests

This section displays the trips requested by the user in a tabular format. The table includes several columns with detailed information about each trip, such as the start date, end date, and trip number. It also shows the submitter, who is the user going on the trip, and categorizes the trip as either domestic or international. Additionally, the table provides the status of approval, which is completed by the reporting manager. This organized layout ensures that users can easily track and manage their travel requests and approvals.

3.2 Overall summary



This section contains the overall summary like

1. Total Trips
2. Total expenses
3. Amount that was reimbursed
4. Expense requests that are pending
5. Expense requests that were approved
6. Month filter
7. Additionally users can hover into the pie chart to obtain additional details

Users can dynamically filter the data by selecting a specific month using the month filter (6). Once a month is selected, the visualization will automatically update to reflect the data for that chosen period. This feature allows for a more tailored and insightful view of the information.

3.3 Payment advance balance

- This section displays the advance travel balance, which is allocated based on the user's grade as determined by the reporting manager.
- After completing a trip, users can upload the relevant documents, and the amount to be reimbursed will be reflected under total expenses in the overall summary dashboard. Once the

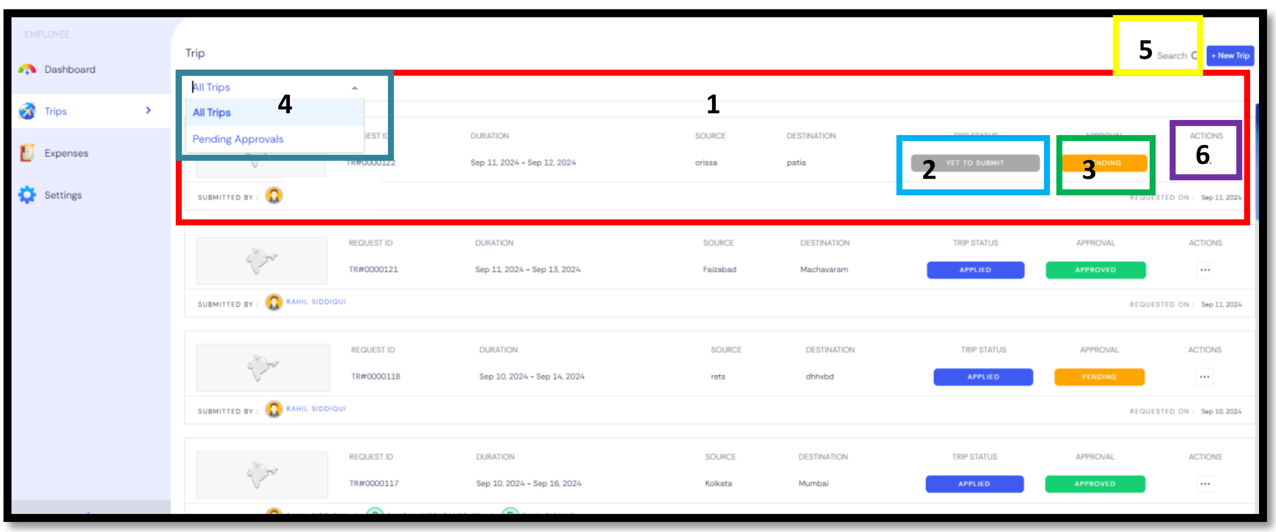
reimbursement amount is approved by the reporting manager, it is deducted from the permanent advance balance.

This process ensures that users have a clear and organized view of their travel finances, from advance allocation to final reimbursement.

3.4 Financial year filter

The financial year filter is conveniently located at the top right corner of the dashboard. Users can select a different financial year using this filter, and the dashboard will dynamically update to reflect the data for the chosen period. This feature allows users to easily switch between different financial years, providing a tailored and comprehensive view of the financial data relevant to their needs. By adjusting the financial year filter, users can gain insights into trends and patterns over various fiscal periods, enhancing their ability to make informed decisions.

4 TRIPS

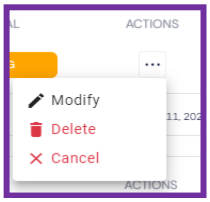


Trip Management Module

This module provides users with detailed information about their travel plans. It includes specifics such as the departure city (source), arrival city (destination), reimbursement status (trip status), and approval status.
Key features include:

1. Trip Details: View comprehensive information about each trip, including departure and arrival cities.

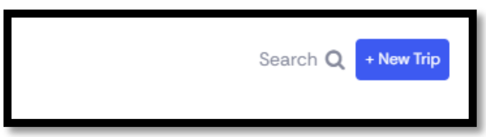
2. Reimbursement Status: Check the current status of your reimbursement requests.
3. Approval Status: Monitor the approval status of your trips.
4. Trip filter: dropdown filter to retrieve records based on approval
5. Search bar: allows user to search for previous records
6. Actions:



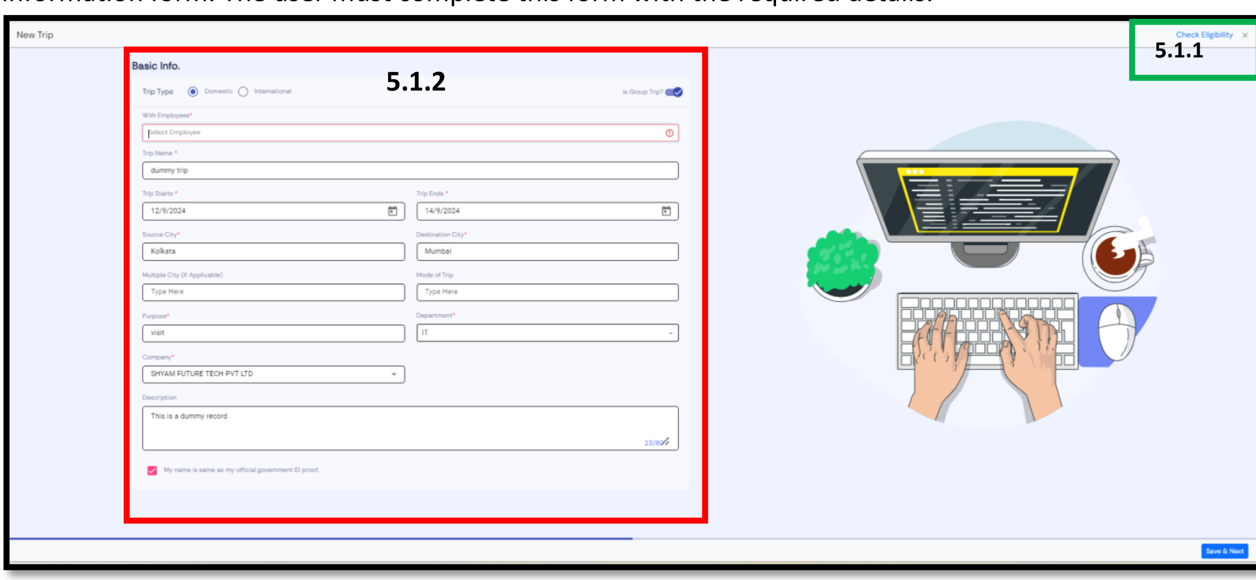
- Modify: Update existing travel records.
- Edit: Make changes to trip details.
- Delete: Remove a travel record.

Additionally, users can create new trips and apply for reimbursements directly from this section.

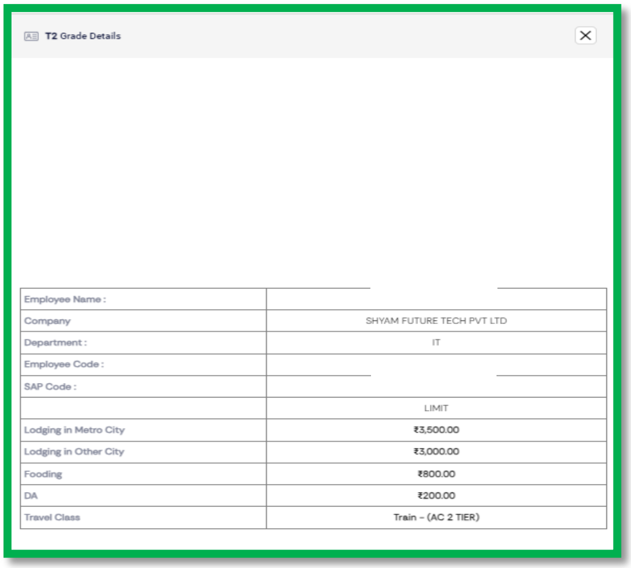
4.1 Adding a trip



To add a new trip, click on the **+New Trip** button located at the top right corner of the window, next to the search bar. Upon clicking this button, the user will be redirected to a new page featuring a basic information form. The user must complete this form with the required details.



4.1.1 Check eligibility

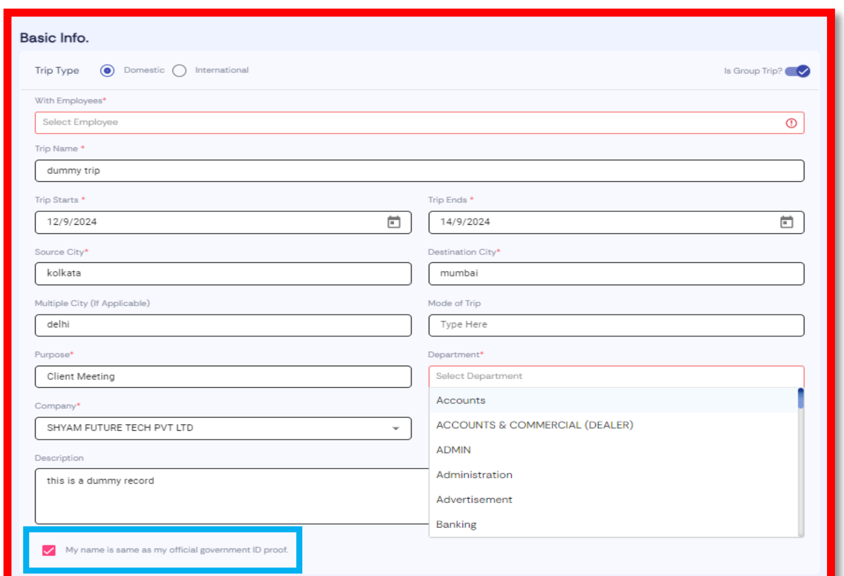


T2 Grade Details

Employee Name :	
Company	SHYAM FUTURE TECH PVT LTD
Department :	IT
Employee Code :	
SAP Code :	
	LIMIT
Lodging in Metro City	₹3,500.00
Lodging in Other City	₹3,000.00
Fooding	₹800.00
DA	₹200.00
Travel Class	Train – (AC 2 TIER)

Upon clicking the Check Eligibility button, a table will appear on the right side of the window. This table will display the user's details and the reimbursement limit, which is determined by the user's grade as assigned by their reporting manager.

4.1.2 Basic Info.



This form requires the user to fill in essential details, including:

- Trip Name
- Start Date
- End Date

- Source City
- Destination City
- Department
- Purpose of the Trip
- Company Name
- Mandatory checkbox

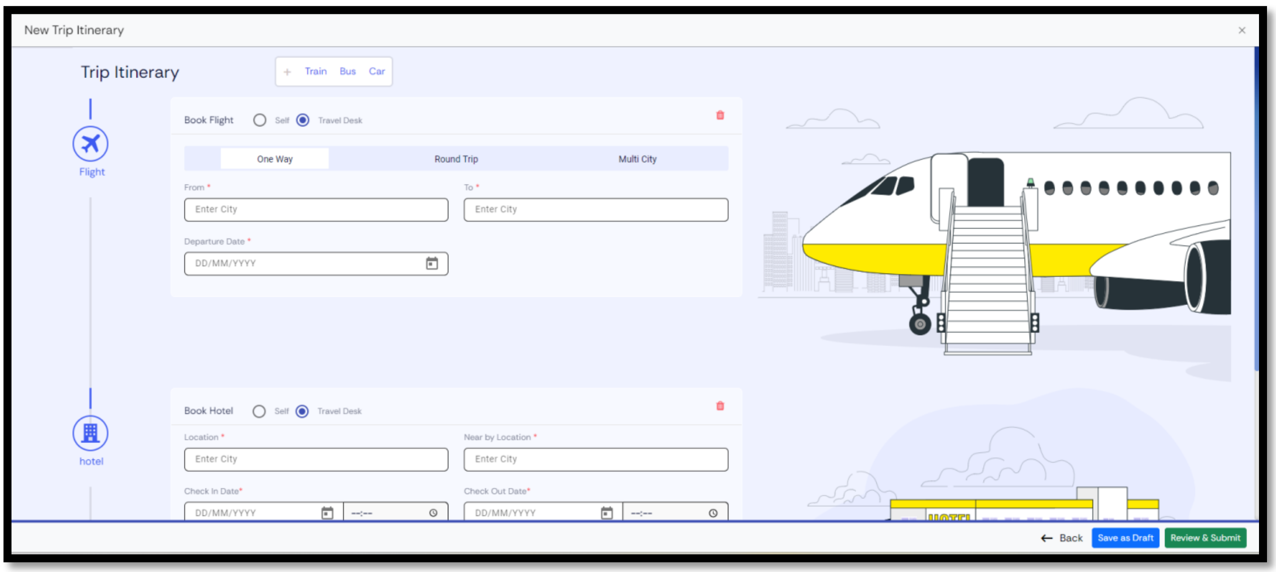
Note: The mandatory checkbox is necessary inorder to proceed

Additionally, the form offers several advanced functionalities:

- Trip Type: A radio button that allows the user to select the type of trip, either domestic or international.
- Group Trip: This feature enables the user to request a group trip if they are traveling with colleagues. When this option is selected, a multi-select dropdown appears, allowing the user to choose other employees who will be part of the trip.

These features ensure that all necessary information is captured to facilitate a smooth and efficient trip request process.

4.1.3 Trip itenary page

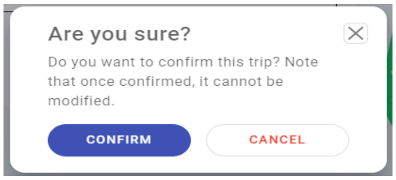


This page enables users to plan their trip itinerary with flexibility. Users have the option to either book their travel arrangements themselves or have them booked by the travel desk. From this page, users can book flights, trains, hotels, cars, and buses.

Key features include:

- **Booking Options**: Users can choose between booking a one-way trip, a round trip, or a combination (e.g., one way by train and return by flight).

- **Accommodation**: Users can add multiple hotels to their itinerary if they are visiting multiple locations, accommodating various business scenarios.

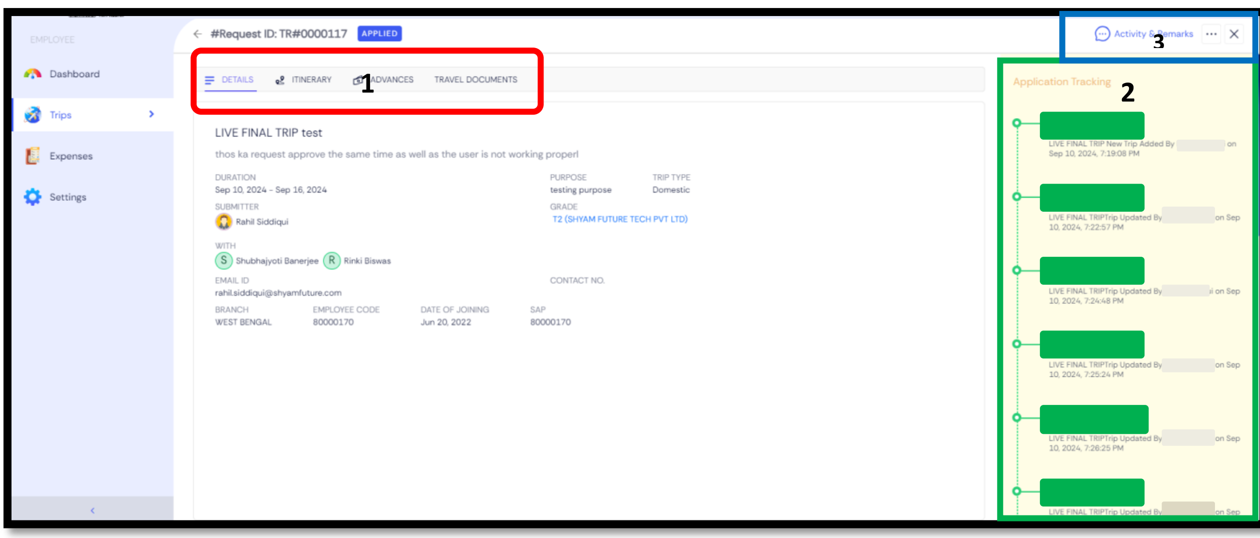


Once the user has filled in all the required details based on their specific requirements, they have two options:

- **Save as Draft**: This allows the user to save their progress and return to it later for further editing or completion.
- **Review and Submit**: This option enables the user to proceed to the next step.

Upon clicking Review and Submit, a confirmation prompt will appear on the screen. The user must validate this prompt to confirm their submission. This step ensures that all entered information is correct and complete before the request is officially submitted.

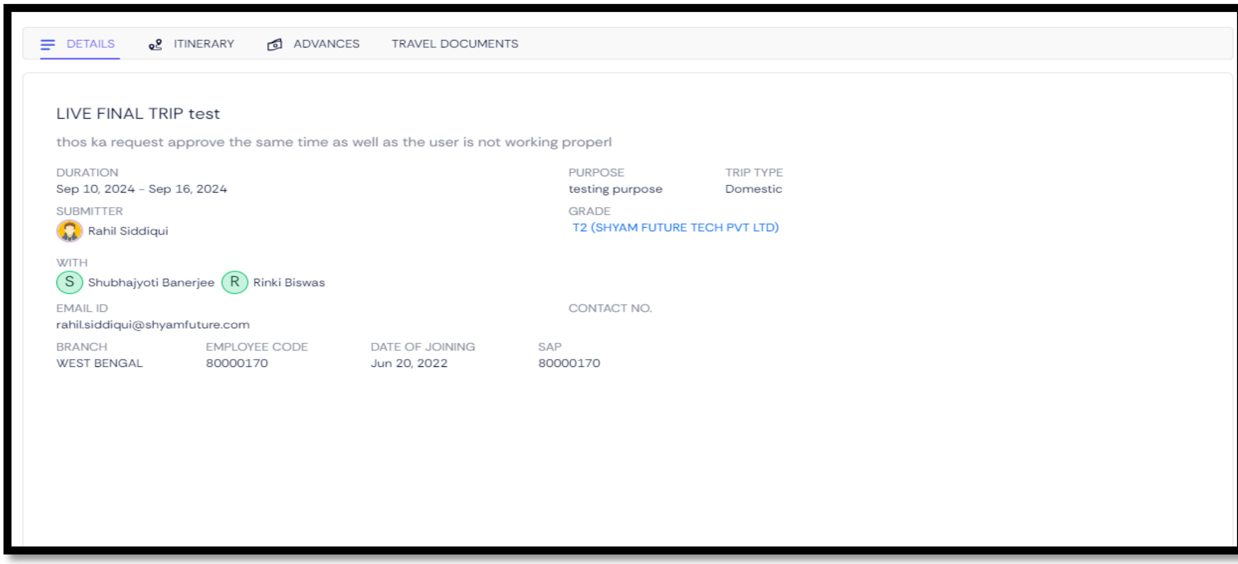
4.2 Trip details



1. Upon selecting a record, the user will be redirected to a new page that contains four distinct sub-modules. These sub-modules provide comprehensive details about each trip the user has undertaken. The information includes user details, itinerary details, advance reimbursement requests, and travel documents.
2. Additionally, the page features an application tracker on the right side of the window. This tracker provides real-time notifications and updates about the specific trip, ensuring the user stays informed about the status and any changes related to their travel plans.

3. Furthermore, the user has the option to add additional remarks if needed. This allows for any extra information or notes to be included, ensuring that all relevant details are captured and easily accessible.

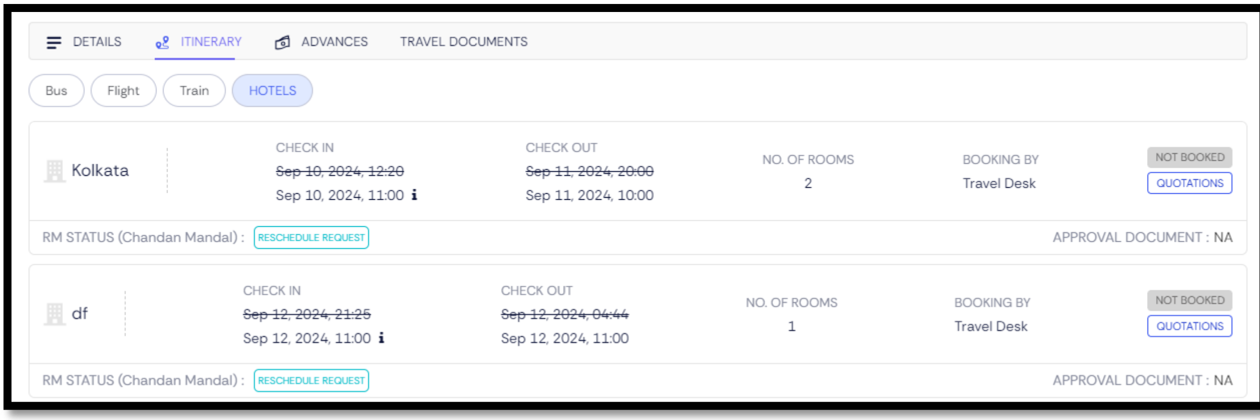
4.2.1 Details



This page provides a comprehensive overview of user details, encompassing a wide range of essential information. It includes the user's email ID, trip duration, purpose of the meeting, and type of trip. Additionally, it details the employee's grade, branch, employee code, date of joining, and SAP ID.

By consolidating all these details in one place, the page ensures that users have easy access to all relevant information. This organized layout not only enhances the user experience but also facilitates efficient management of travel-related tasks. Whether it's for administrative purposes or personal reference, having all this information readily available is invaluable for both the user and the organization.

4.2.2 Itenary

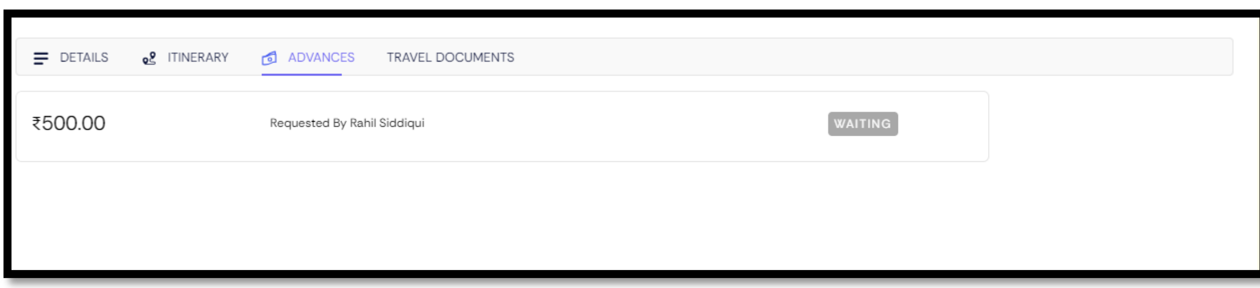


This page offers a detailed overview of your entire travel itinerary, covering all aspects such as hotels, trains, flights, buses, and cars. For an enhanced user experience, the information is neatly categorized, allowing users to easily navigate through different sections like trains, buses, cars, and hotels by using the switch bar. This intuitive design ensures that users can quickly find and manage the specific details they need. Users can effortlessly switch between categories to view and manage their bookings, ensuring that every aspect of their travel is organized and easily accessible.

In addition to viewing itinerary details, users have several interactive options. They can download their tickets directly from the page, request rescheduling of their travel plans, and check the approval status of their requests. These features ensure that users have all the necessary tools to manage their trips efficiently and effectively.

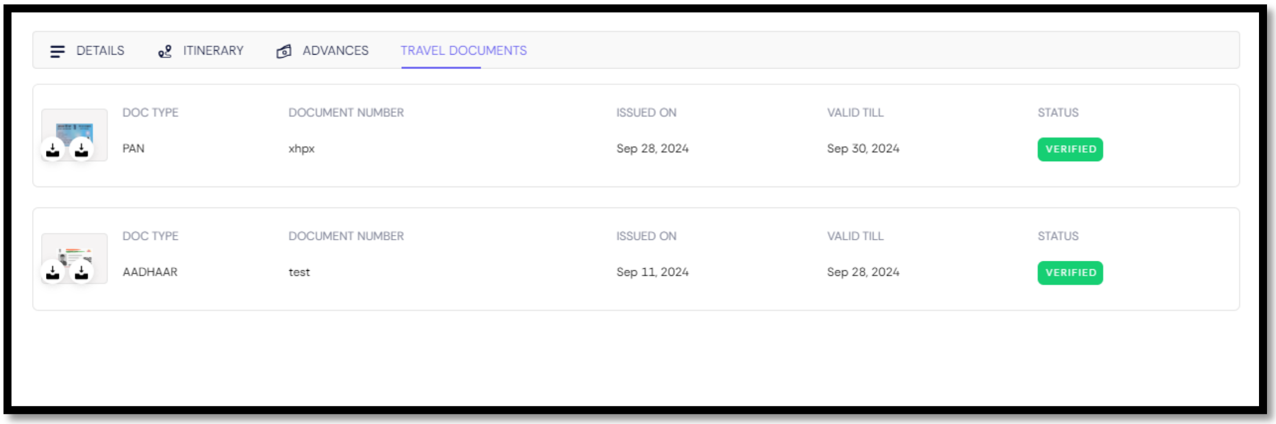
Moreover, the page is designed to be user-friendly, offering a seamless experience for managing travel logistics. Whether it’s making adjustments to travel plans or simply staying informed, this page provides all the functionalities needed to ensure a smooth and hassle-free travel experience.

4.2.3 Advances



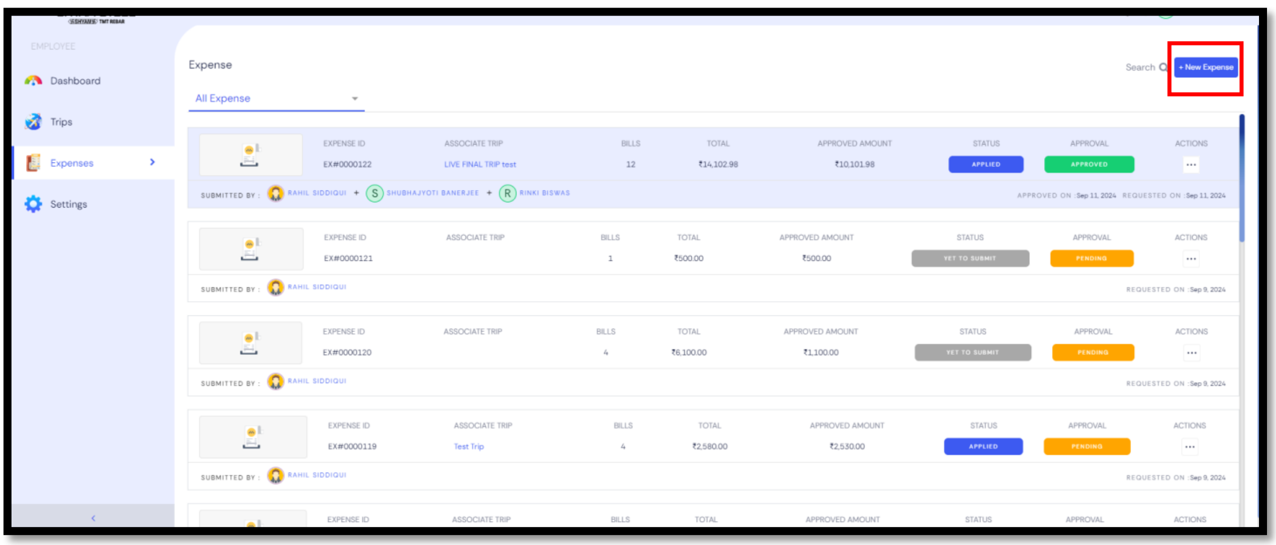
This page provides a detailed overview of all reimbursement requests submitted by the user. It includes information on each request, such as the date of submission, the type of expense, the amount requested, and the current status of the request (waiting, approved, or rejected). This organized layout allows users to easily track their reimbursement claims, ensuring transparency and facilitating efficient financial management. Additionally, users can view any comments or feedback provided by the approvers, making it easier to address any issues or provide additional information if needed.

4.2.4 Travel expenses



This page provides a comprehensive repository of all travel documents submitted by the user, including passports, visas, and other essential travel-related paperwork. Each document's verification status is clearly displayed, allowing users to easily track which documents have been approved, are pending review, or require further action. This organized and transparent system ensures that users are always informed about the status of their travel documentation, facilitating a smoother and more efficient travel planning process.

5 EXPENSES

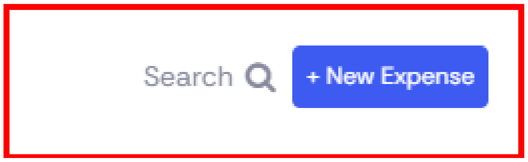


The Expenses module is designed to meticulously track and manage user expenses across various trips. Within this module, users can also submit reimbursement requests, ensuring a streamlined process for financial management.

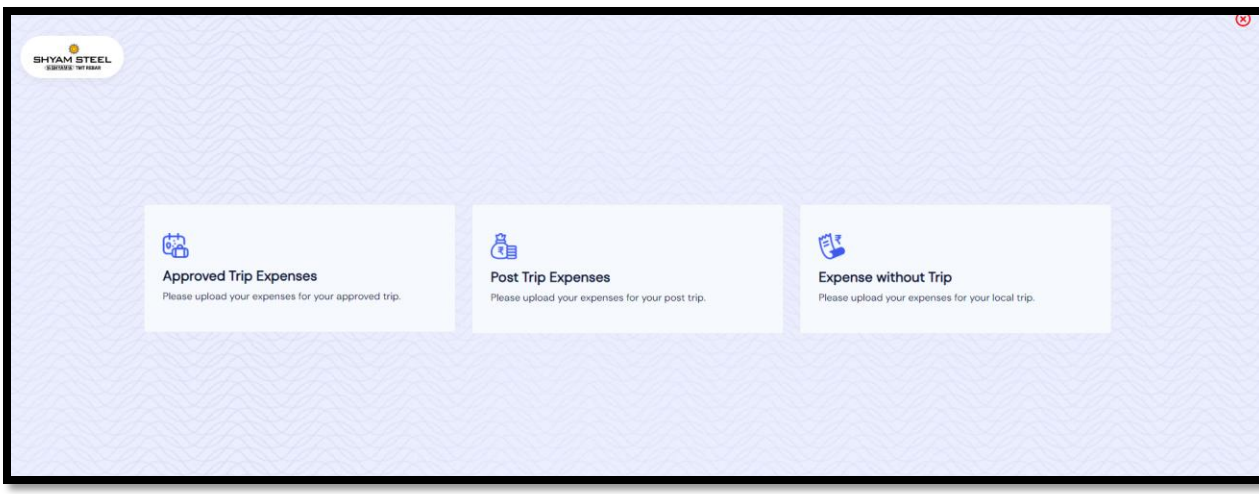
Each record on this page provides a detailed breakdown of expenses, including the expense ID, associated trip, number of bills submitted for that trip, total amount requested for reimbursement, and the total amount approved. Additionally, it displays the current status of the reimbursement application and the approval status of each request. An action button is also available, allowing users to perform necessary actions such as editing or resubmitting requests, log bike/car details, view reports etc.

This comprehensive layout ensures that users have a clear and organized view of their expenses, facilitating efficient tracking and management of financial transactions related to their trips.

5.1 Adding a new expense

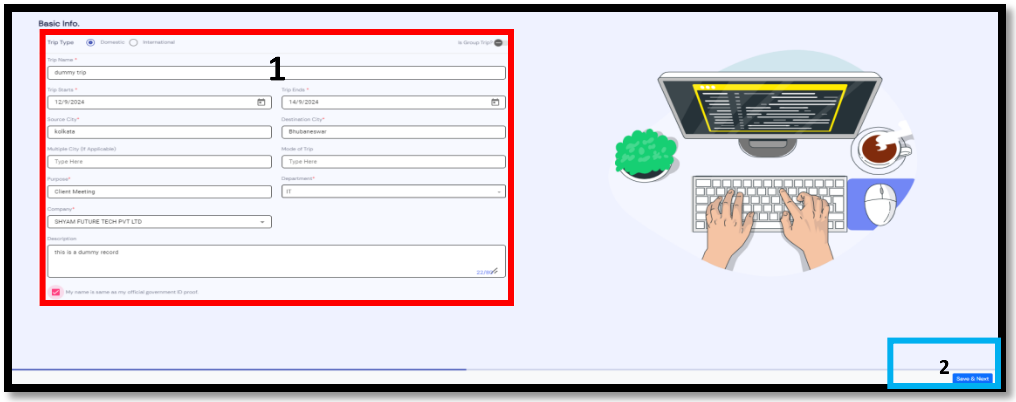


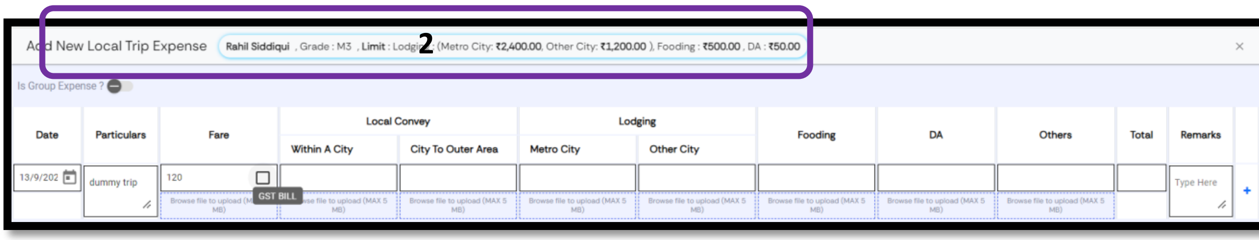
To add a new expense, click on the +New Expense button located at the top right corner of the window, next to the search bar. Upon clicking this button, the user will be redirected to a new page containing the categories below specifically designed for entering expense details.user can choose between any of this three categories Based on user requirements



1. Upon selecting any of these three categories, users will be redirected to a basic information form. This form requires users to fill in all mandatory details accurately. Each field marked as mandatory must be completed to proceed further.

2. Once the user has entered all the necessary information, they need to click on the mandatory checkbox to confirm that all required fields have been filled. After this confirmation, the user can move to the next page to continue with the process by clicking on **Save & next**

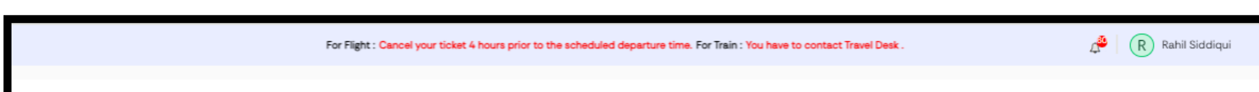




1. After completing the basic information form, users will be redirected to a detailed expense input form. Here, they can enter various expenses under different categories such as food, lodging, local transportation, and more. Users also have the option to upload relevant documents pertaining to expenses for reimbursements later on. To do this, users need to click on the checkbox that appears after inputting the expense. Once the checkbox is clicked, a small window will open where users can upload their document. After uploading, an info icon will appear beside the checkbox, which users can click to view the document
2. At the top of this form, users will see their total travel allowance displayed prominently.

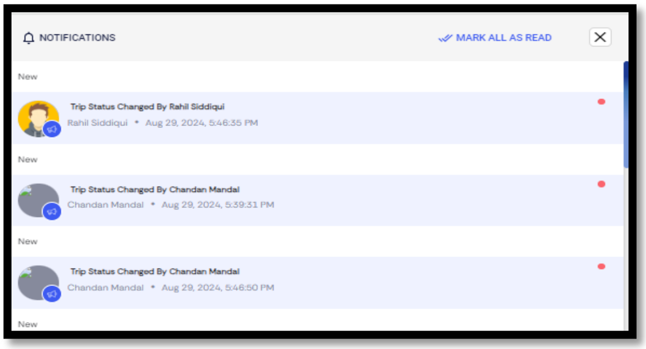
Upon completion users can click on save and next button to submit the expense record successfully

6 TOOLBAR



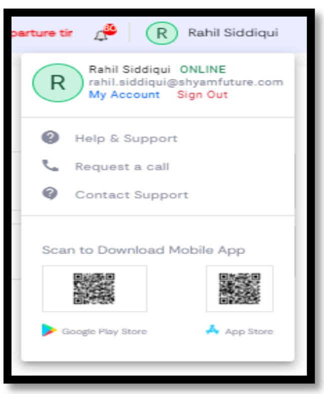
The toolbar, located at the top of the page, provides several key functionalities. It prompts options for initiating cancellation processes for both train and flight bookings. Additionally, there is a notification panel that keeps users informed about important updates and alerts. Lastly, a user support panel is available to assist with any queries or issues, ensuring a smooth and efficient user experience.

6.1 Notification panel



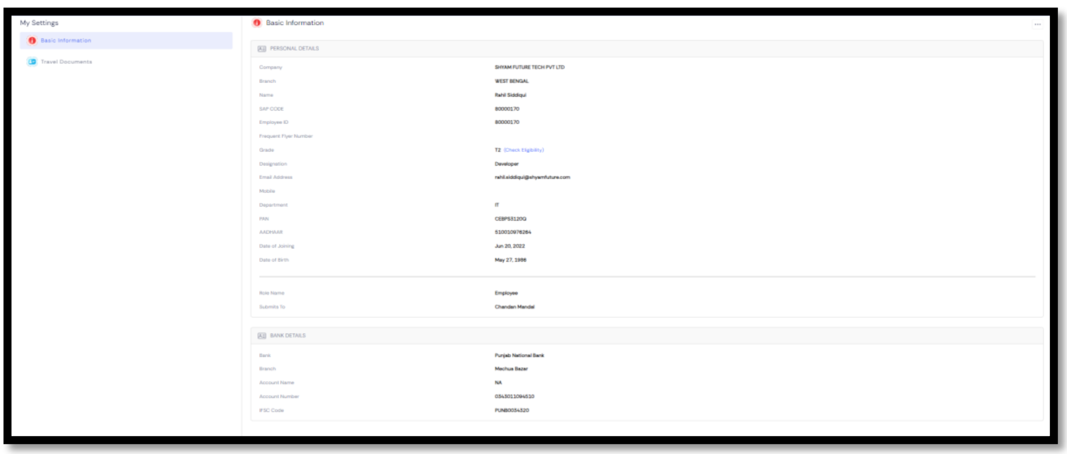
The notification panel provides real-time updates on the status of trips, which can be updated by either the user or their reporting manager. This includes information such as upcoming travel dates, changes to itineraries, and any cancellations or delays. By keeping all relevant parties informed, the notification panel ensures that everyone is aware of the latest developments, helping to streamline communication and coordination for travel plans.

6.2 Support panel



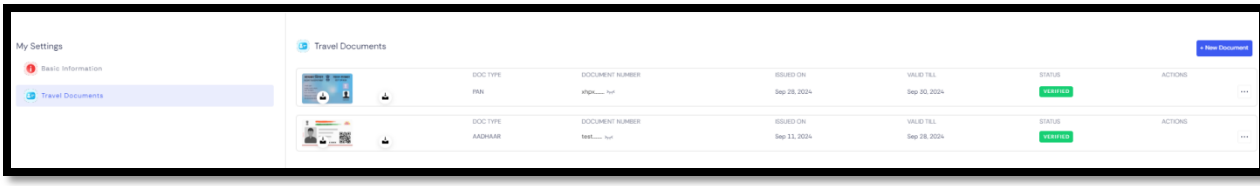
Users have several options to access support based on their needs. They can request a call, browse through support articles, or contact support directly. In case of an emergency, users can immediately call support for urgent assistance. Additionally, they can view support documents that provide the relevant email addresses for specific issues. For more personalized help, users can contact the support desk by providing their mobile number and specifying the urgency of their situation. This comprehensive support system ensures that users receive timely and appropriate assistance for any issues they may encounter

7 SETTINGS



7.1 Basic information page

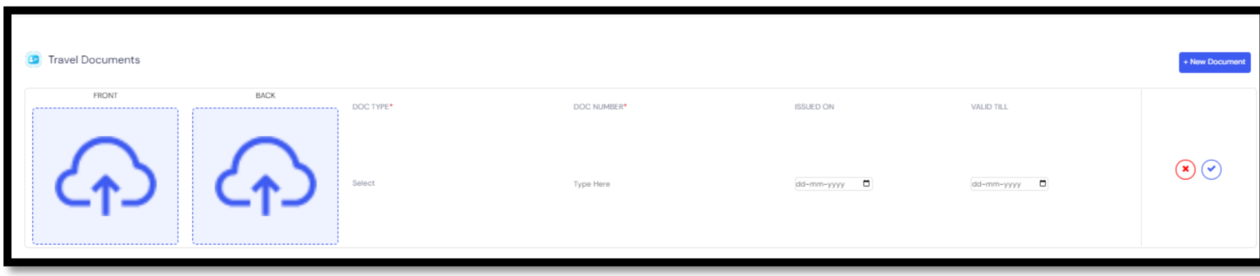
This page contains comprehensive user information, including personal details like name, address, and contact information, as well as sensitive financial data such as bank account numbers and transaction history.



7.2 Travel documents

This page serves as a repository for all the travel documents that the user has uploaded, such as passports, visas, and travel itineraries. Users have the flexibility to manage their documents by uploading new ones, as well as editing or deleting existing documents. This functionality ensures that users can keep their travel information up-to-date and organized efficiently

7.2.1 New document



To upload new documents, users can simply drag and drop the files into the designated area on the page. Once the document is uploaded, users need to provide additional details such as the document number and its validity period. This ensures that each document is properly identified and tracked for its expiration date. This streamlined process makes it easy for users to keep their travel documents organized and up-to-date