

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

- Collected requirements from employees, managers, and finance team.
- Identified the need for a centralized system to handle travel requests, approvals, and expenses.
- **Key requirements:**
 - Simple form for employees to submit travel requests.
 - Automated approval notifications for managers.
 - Ability to log expenses against approved trips.
 - Department-wise and organization-wide reporting.

2. Stakeholder Analysis

- **Employees:** Submit travel requests and expense claims.
- **Managers/Approvers:** Approve or reject requests based on budget and necessity.
- **Finance/Admin:** Track expenses, generate reports, and ensure compliance.
- **System Administrators:** Configure, manage, and maintain the Travel Approval App.

3. Business Process Mapping

- **Current Process (Existing System):**
 - Travel requests handled via emails, paper forms, or spreadsheets.
 - Delays due to manual tracking and lack of centralized data.
- **Proposed Process (Using Salesforce App):**
 - Employees submit requests in Salesforce.
 - Managers receive automated approval tasks.
 - Expenses linked directly to approved requests.
 - Reports and dashboards provide real-time insights.

4. Industry-specific Use Case Analysis

- **IT/Software Companies:** Frequent client visits, onsite travel approvals.
- **Educational Institutions:** Faculty travel for seminars, workshops, and conferences.
- **Corporate Organizations:** Employee travel for training, meetings, and business expansion.
- **Healthcare Industry:** Doctors and medical staff travel for workshops and conferences.
- **Common challenge:** Manual tracking leads to delays, higher costs, and lack of transparency.

- **Proposed system:** Improves efficiency, transparency, and cost tracking across industries.

5. AppExchange Exploration

- Explored Salesforce **AppExchange** for existing travel and expense management solutions.
- Found apps like **Concur Travel & Expense** and **Expensify** for Salesforce.
- Identified limitations in existing apps for specific organizational needs.
- Decided to **build a custom Travel Approval App** tailored to department-wise workflows and reporting requirements.