Travel Management App Based on Salesforce Platform

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Abstract

Travel Management App allow us to organize our data and monitor our travel plans and expense and across all the organization. Customize Reports and Dashboards provide complete view of reports for our team in Salesforce. When time make all the difference in closing and winning deals, this system provide us the perfect solution as a supervisor to timely approve and monitor travel plans and expenses for our team, making them more effectively. Get a clear view of estimated travel expenses for each travel request travel requests and expenses.

The need of the travel management app is to simplify the way organisations manage and justify business travel.Employees save time by searching and expensing trips in the same platform, increasing productivity and eliminating end user frustration. Managers get complete visibility of expenses.Managing pre-book Travel Requests, Multilevel Approvals, & Expense Reporting got easier & efficient in Salesforce. Get automated email, chatter, & mobile notifications. Manage travel authorization & expenses from any device anywhere.Pre-built Reports and Dashboards provides complete view of travel requests and expenses..

Keywords

Salesforce , Travel Management App , Travel Request, Travel Expense , Expense Request, Expense Items, Salesforce 1, Gantt Chart, CRM, Sales Cloud.

I. Introduction

"Travel management App" provide us different services and benefits, which help us to ensure that departments and employees spend sensibly. while away for business travel, whether to attend meetings, conferences or visit other corporate office. Travel costs and expenses often make up a sizeable portion of a organization annual year budget, so having a good strategy is important to protecting the bottom line. Though travel is often necessary, there are ways to secure lower prices to make it as economical as possible. Travel management is the process of securing the lowest possible rates for corporate travel, as well as tracking employee expenses on meals, ground transportation, lodging and other things acquring. Organization can do this internally through the accounting or human resources department. Alternately, they might give this responsibility to a travel management company.

A. Background history related to project

Managing business trip has become a complicated process with lots of overhead before, during, and after the trip. Communication get lost in emails and leads to lack of compliance with corporate policies and employee dissatisfaction . so to reduce these overhead we added some features .These features are
Automate Pre-Book Approval Process and integrate with SF1. Associate travel request to account, contact, lead, opportunity, or events.Notifications via Workflow, Chatter, and Email. Effectively Manage Your Team Travel Schedule & Estimated Expenses via any device while on the road.Multilevel Approvals and Travel Assistance NotificationTeam Travel Schedule - 360 degree view of your team's travel plans and approvals (Pre-built Reports and Dashboards) provides complete view of travel requests and expenses.
 Between the paragraphs 6 points space has to be left before and after the paragraph.

B. Supported technologies :- SALESFORCE

Salesforce is a customer relationship management solution that brings companies and customers together and provide business to business processes. It is one integrated CRM platform that provides your departments different services including marketing, sales, commerce, and service — a single shared view of every

customer. It provide companies with an interface for different case management and task management. customer relationship management (CRM)
A CRM is a tool that companies uses for enhancing their relationships with customers. A Customer Relationship Management like Salesforce supports businesses sequentially acquiring new customers and creating customers. Salesforce also assists firms in analyzing the data that they collect.

II. Cloud Architecture

It is a module in the Salesforce CRM that helps the different sales team majorly to efficient access of data over the cloud that includes the contacts, Billing address,mailing address , and accounts of various customers that have bought the product from the company. It assists the managers, leader, team and the sales team of that organisation to connect with the customers and provide direction toward more sales.
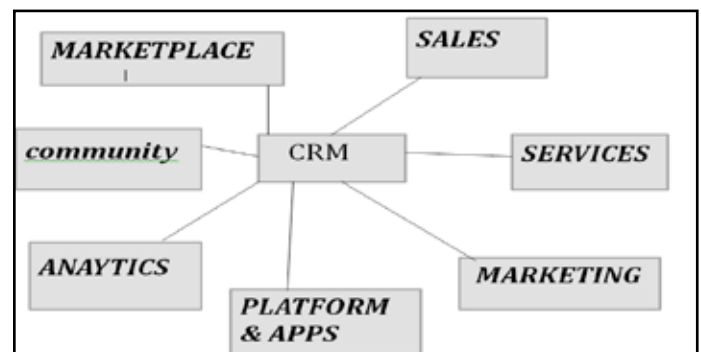

Fig. 1: Cloud Architecture provided by Salesforce.

III. Working Of The Designed System

Need different Visual Force Pages. Creating various objects in database as needed and different fields and records. we need Approval Process which send the email alert to the approver which can approver or reject the request. we need to associate multiple objects with different relationship.
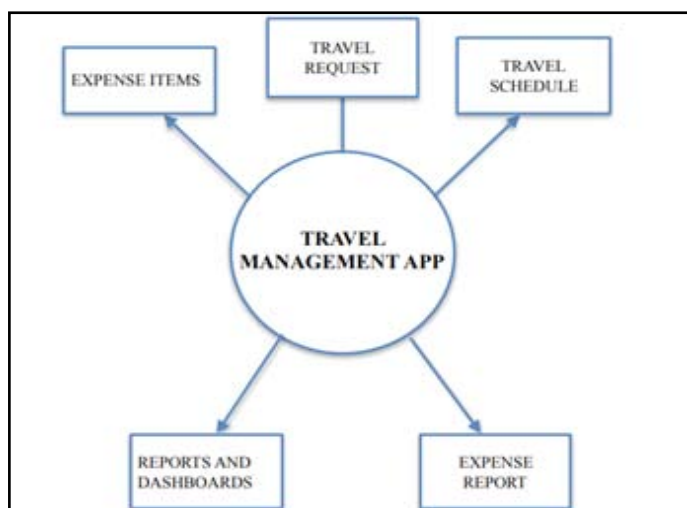
Fig. 2: Data Flow Diagram of the System

A. Sales Cloud

Give complete information of the customers and users including communication, discussion, contact phone number and email. Give alerts on active leads and helps to create reports and dashboards which can be used for further information. This leads can take faster decisions. Helps simplifying the approval process for the user and automate any business process using simple drag and drop facilities.
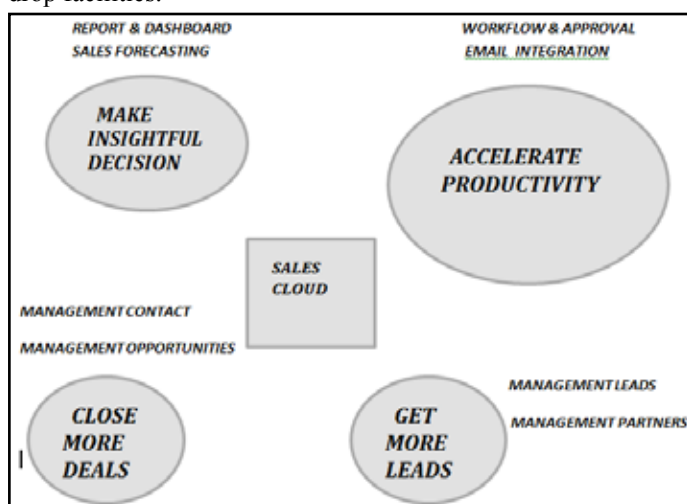

Fig. 3: Sales Cloud Architecture provided by Salesforce.

IV. Conclusion

Here we have presented the design of a travel management system on Salesforce Platform which can provide the users with the required travel assistant and also for the higher authorities to take care of the expensis at any point of time through multilevel approvals of the travel request. Here the user can upload the bills to cloud any time which is more efficient and productive. Travel Management System allow us to organise and monitor travel plans and expense reports for our organisation using Salesforce Platform. When it makes all the difference in closing and winning of any deal , this app provides you that perfect solution as a manager to timely approve the request and monitor travel plans and expenses for our organisation, making them more efficient to use. Get a clear view of estimated travel expenses for each travel request and across all the organisation. Pre-built Reports and Dashboards provide complete view of travel requests and expenses.we also have approval process for the approval and

rejection of our request.

V. AcknowledgEment

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