

Travel Easy – An Application for Travel Approval and Monitoring Expenses

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Abstract - The TravelEasy web application is a cloud-based travel and expense management system developed to streamline the process of business travel planning, approval, and reimbursement. Designed with flexibility and automation in mind, it enables employees to easily submit both individual and group travel requests through a user-friendly interface. The application utilizes Salesforce as its backend, leveraging custom objects, Lightning Web Components (LWC), and Flows to automate approval workflows and manage data effectively. Managers and finance teams can track requests in real time, approve or reject them based on policy rules, and monitor associated expenses with ease. One of the key features of Travel Easy is its expense management capability, where users can log categorized expenses under approved trips. Overall, TravelEasy improves efficiency, enhances transparency, and reduces manual effort across the organization's travel and expense operations.

Key Words: Travel approval, Salesforce, Managers

1. INTRODUCTION (Size 11, Times New roman)

The main objective of the TravelEasy web application is to create an integrated and automated platform that manages the entire lifecycle of corporate travel and expense activities. The system is designed to simplify the process for employees to raise travel requests, input essential trip details, add group members (if applicable), and estimate expenses before travel begins. It allows users to categorize and record travel-related expenses such as accommodation, meals, transportation, and other costs—while maintaining proper documentation through receipt uploads. One of the core goals is to eliminate the inefficiencies of manual request handling, scattered communication, and paper-based approvals by introducing a structured, digital workflow powered by Salesforce automation tools such as Flows, Apex logic, and Lightning Web Components. For managers and finance administrators, the application provides a centralized dashboard to view incoming travel requests, analyze estimated vs. actual expenses, and approve or reject submissions with just a few clicks. Automated notifications and approval routing ensure that processes are completed on time, without the need for constant follow-ups or reminders. The system also includes features like virtual card expense simulation, reimbursement status tracking, and audit-friendly logging of actions and approvals, which promote transparency and accountability across the organization. Ultimately, TravelEasy aims to improve employee experience, enhance financial oversight, and help companies implement a standardized, secure, and efficient approach to managing business travel and related expenses.

2. Literature Survey

John Smith, et.al.,...[1], in their paper “Design and Implementation of an Automated Travel Expense Management

System”, focused on building an efficient digital solution for streamlining travel expense handling in organizations. They emphasized the significance of integrating user-friendly interfaces to simplify the submission and review of travel requests and expense claims. The study highlighted that ensuring secure data handling through encryption and access controls is essential to protect sensitive financial information. Their system design incorporated automation in key workflows, such as approval routing and expense validation, reducing manual effort and processing delays. The authors concluded that implementing such an automated framework not only enhances operational efficiency but also improves user satisfaction by offering transparency, speed, and ease of use throughout the travel management lifecycle.

David Lee, et.al.,...[3], in their paper “Enhancing Expense Reporting Through Mobile Applications”, examined the role of mobile platforms in simplifying and accelerating the expense reporting process. They emphasized how mobile applications significantly improve user engagement and convenience by allowing employees to submit expenses on the go, reducing delays and minimizing manual data entry. Their findings revealed that mobile-first design leads to better compliance with company policies, quicker approvals, and enhanced user satisfaction. Applied to the TravelEasy system, these insights reinforce the importance of responsive design and mobile compatibility, enabling employees to upload expense receipts, track approval status, and manage reimbursements directly from their smartphones. This mobile-enabled workflow ensures real-time updates and seamless integration with backend systems, ultimately streamlining the entire expense management lifecycle.

3. Existing system

Before the implementation of the TravelEasy system, the organization relied heavily on a manual and fragmented process for managing travel requests and expense tracking. Employees were required to submit travel requests and expense claims through emails or Excel spreadsheets, which often led to confusion and miscommunication. The approval process typically occurred through lengthy email chains or offline discussions, resulting in delays. There was no centralized system to track the status of approvals or integrate travel planning with expense monitoring. As a result, it was difficult for employees and managers to have visibility into ongoing or trips, and reimbursements were often delayed or duplicated. The system also lacked support for mobile access or external users. Furthermore, there were no dashboards to analyze travel trends or costs, leading to inefficiencies and difficulty in ensuring policy compliance. The absence of automation and real-time updates made the process slow and hard to audit.

DISADVANTAGES

- Lack of Centralized Tracking
- Delayed Approvals

- No Real-Time Visibility
- Absence of Reporting & Automation

4. Proposed system

TravelEasy also offers real-time visibility into the status of travel requests and expenses through interactive dashboards and reports, which provide valuable insights into travel trends, cost optimization, and policy compliance. The system features an intuitive calendar widget that displays booked travel dates and allows users to quickly create new travel requests. An animated travel timeline visually tracks the approval status of each request, while a boarding pass generator provides users with a printable, styled pass for approved trips. Furthermore, TravelEasy supports mobile access, allowing users to manage their travel and expenses on the go. By automating approval workflows, providing real-time notifications, and enabling seamless communication, TravelEasy reduces administrative overhead, accelerates approval cycles, and enhances transparency. With full integration for both internal employees and external users, the system offers a flexible, scalable, and secure solution that ensures travel and expense management is efficient, compliant, and easy to use.

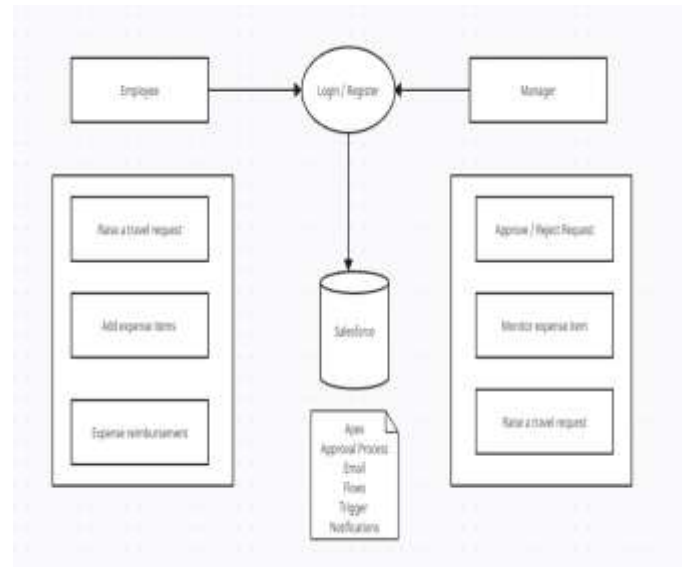


Fig -1: Figure

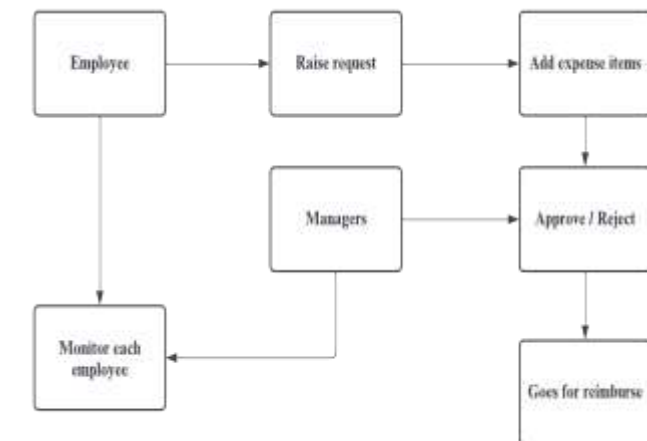
The system implementation of the "TravelEasy" Travel and Expense Management Application is designed to empower employees and organizations by providing a streamlined platform to manage travel approvals, expense tracking, and reimbursements effectively. By integrating essential features such as profile-based access, a 3-tier approval workflow, automated notifications, and expense policy enforcement, the platform enhances operational efficiency, transparency, and compliance. Employees can easily submit travel requests, add expense items, and monitor approval status, while managers can review, approve, or reject requests with clarity and accountability. The system also supports automatic email updates, budget enforcement, and access control, ensuring that every process aligns with organizational policies. This implementation not only simplifies internal processes but also fosters better communication and decision-making across departments, offering a centralized and reliable solution for managing business travel and expenses.

6. CONCLUSIONS

In conclusion, the proposed system, "TravelEasy – A Web-Based Travel and Expense Management Platform," offers a comprehensive and efficient solution to overcome the limitations of traditional manual travel request and expense processes within organizations. By providing a centralized digital platform, the system streamlines the submission, approval, and monitoring of travel requests and associated expenses. It facilitates transparent workflows, ensuring timely approvals through a structured three-tier approval mechanism and automated reimbursement tracking, reducing delays and inconsistencies. The platform empowers employees with a clear, user-friendly interface to manage their travel needs while equipping managers and administrators with real-time insights for informed decision-making. Integrated features like expense policy enforcement, request limits, and automated notifications ensure compliance and reduce administrative overhead. By enhancing visibility, accountability, and accessibility, TravelEasy not only improves operational efficiency but also aligns with modern enterprise goals of digital transformation, cost optimization, and employee satisfaction. Future enhancements such as analytics dashboards, mobile compatibility upgrades, and integration with corporate travel partners can further extend the platform's

5. System Architecture

The TravelEasy system architecture is designed to ensure seamless interaction between employees, managers, and administrators for efficient travel request management, expense tracking, and reimbursements. Administrators can configure policies, set expense limits, and manage user roles and permissions. The backend ensures smooth data processing and real-time updates, while the frontend, built using Salesforce Lightning Web Components (LWC), provides a responsive and user-friendly interface. The centralized database stores all travel and expense data, approval records, and user information, ensuring data integrity and enabling seamless communication between the system's components.



capabilities. Overall, TravelEasy has the potential to significantly improve internal travel management systems and set a standard for streamlined, scalable, and policy-compliant travel and expense solutions in organizations.

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