Salesforce Expense Request Approval Process Setup Document
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Project Title: Salesforce Expense Request Approval Process Setup
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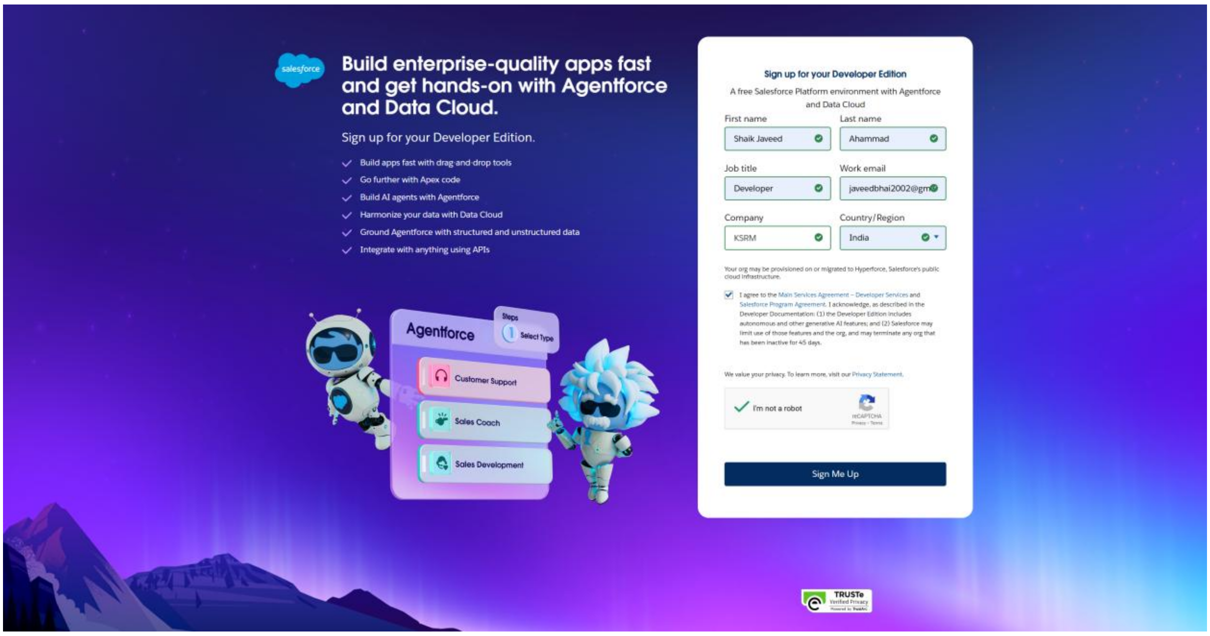
1. Salesforce Org Preparation

- Sign up for a Salesforce Developer Edition org, or log in to your company's sandbox/production environment.
- Confirm that your user profile or assigned permission set includes "System Administrator" or the required permissions to create objects, fields, and automation.
- (Optional) Enable Lightning Experience for a modern interface and enhanced usability.

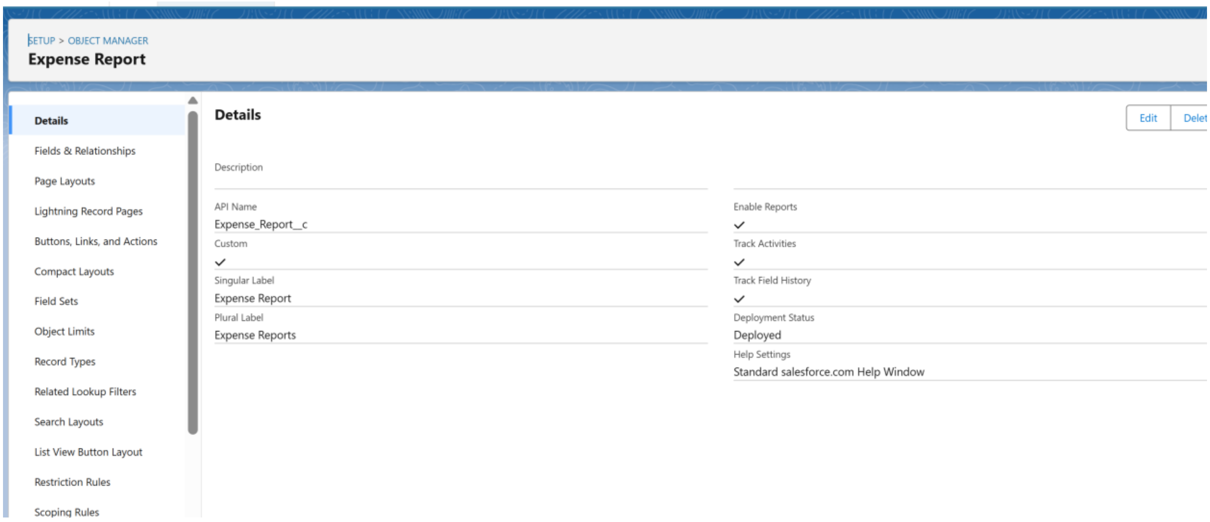


2. Create Custom Objects

Expense Report

- Path: Setup → Object Manager → Create → Custom Object
- Label: Expense Report
- Plural Label: Expense Reports

- Object Name: Expense_Report__c
- Record Name: Auto Number (Format: ER-{00000})
- Options: Enable for Reports, Activities, and Lightning Experience



Expense Item

- Path: Setup → Object Manager → Create → Custom Object
- Label: Expense Item
- Plural Label: Expense Items
- Object Name: Expense_Item__c
- Record Name: Auto Number (Format: EI-{00000})
- Relationship: Master-Detail with Expense Report (parent)

3. Custom Fields on Expense Report

- **Submitter**: Lookup (User) → identifies the user submitting the report.
- **Status**: Picklist → Draft, Submitted, Approved, Rejected, Returned.
- **Total Amount**: Currency → Roll-up summary of related Expense Item amounts.
- **Start Date / End Date**: Date → span of expenses.
- **Submitted Date**: Date/Time → tracks when report enters approval process.
- **Description / Notes**: Long Text Area → stores additional details.
- **Approved By**: Lookup (User) → captures final approver.

4. Custom Fields on Expense Item

- **Type**: Picklist → Travel, Lodging, Meals, Other.
- **Amount**: Currency.
- **Expense Date**: Date.
- **Description**: Long Text Area.
- **Expense Report**: Master-Detail → links to parent Expense Report.

5. Roll-Up Summary on Expense Report

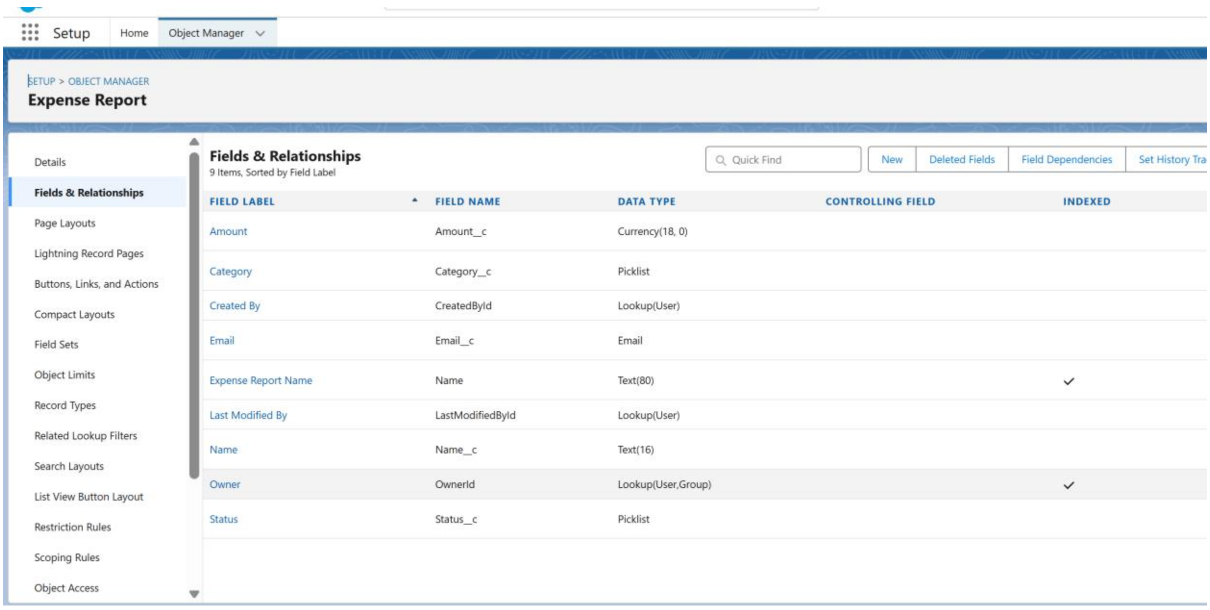
- Field: **Total Amount**
- Summarized Object: Expense Item
- Roll-Up Type: SUM of Amount field

6. Create Tabs

- Path: Setup → Tabs → Custom Object Tabs → New
- Create **Expense Report** tab
- Create **Expense Item** tab
- Assign tab styles and adjust visibility for selected profiles

7. Next Steps (Optional)

- Configure approval processes to automate routing and notifications.
- Add validation rules to maintain data quality.
- Customize page layouts and Lightning record pages for better user experience.
- Define permissions and sharing settings by role or profile.
- Build reports and dashboards for tracking expense submissions and approvals.


Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Expense Report
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Fields & Relationships
9 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tra
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Amount
Amount__c
Currency(18, 0)
Category
Category__c
Picklist
Created By
CreatedById
Lookup(User)
Email
Email__c
Email
Expense Report Name
Name
Text(80)
Last Modified By
LastModifiedById
Lookup(User)
Name
Name__c
Text(16)
Owner
OwnerId
Lookup(User,Group)
Status
Status__c
Picklist