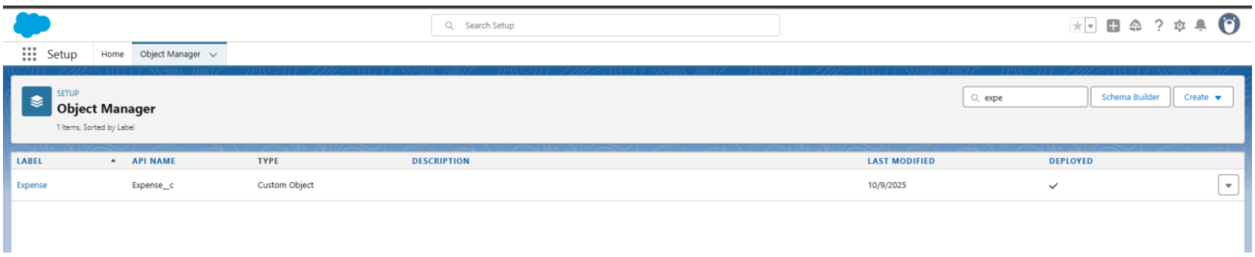
EXPENSE TRACKER APP

Phase 3: Data Modeling & Relationships

Goal: Build the data structure for the Expense Tracker project, including custom objects, fields, relationships, layouts, and validation.

Step 1 — Create Expense Object

1. Navigation: Setup → Object Manager → Create → Custom Object
2. Label: Expense
    - Plural: Expenses
    - Object Name/API: Expense__c
3. Record Name: Auto Number
    - Display Format: EXP-{0000}
    - Starting Number: 1
4. Optional: Description: Expense Tracker object
5. Save

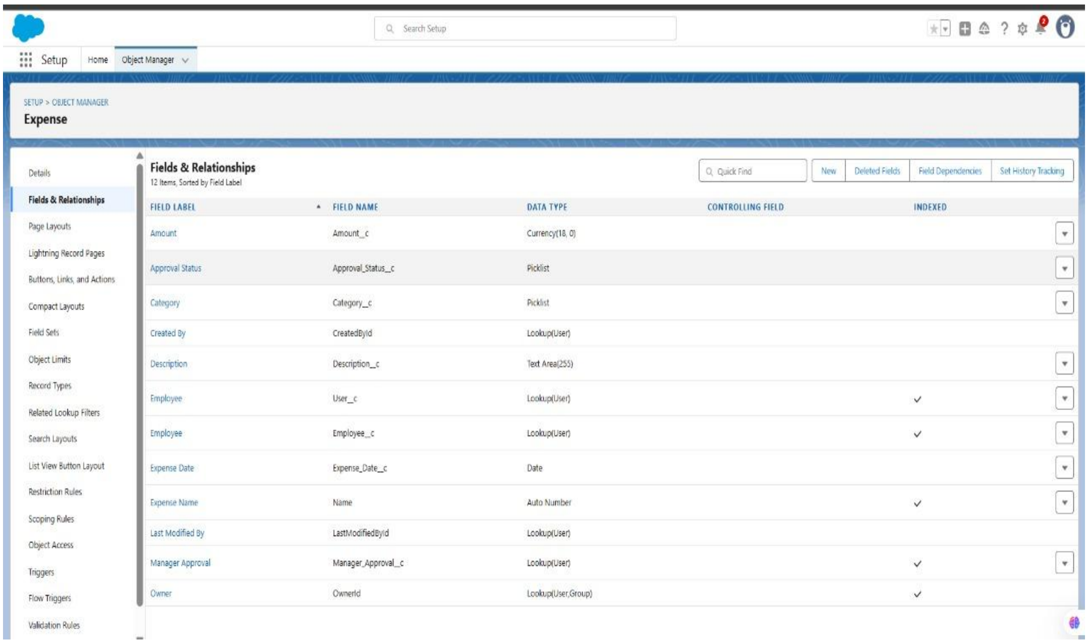


Step 2 — Add Fields to Expense Object

1. Navigation: Setup → Object Manager → Expense → Fields & Relationships → New
2. Mandatory Fields:
    - Amount: Currency (Required)

- Expense Date: Date (Required)
- Category: Picklist (Travel, Food, Other)
- Expense Number: Auto Number (Already created)
- Description: Text Area (Optional)
- Employee: Lookup(User) (Required)
- Approval Status: Picklist (Pending, Approved, Rejected)

3. Click Save after creating each field



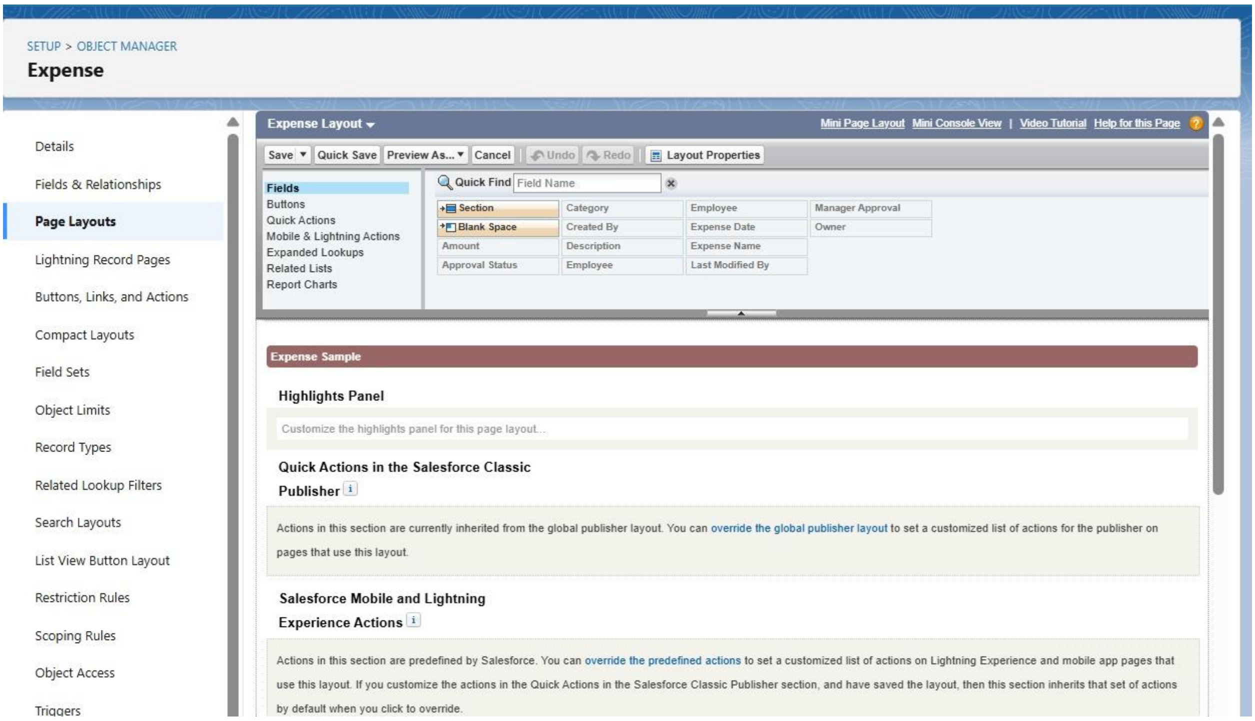
Step 3 — Relationships

1. Expense ↔ User
   - Type: Lookup
   - Lookup Field Name: Employee
   - Required: Checked (every expense must be linked to a user)
   - Rationale: Each expense is submitted by a single employee
2. Optional: Manager Approval Lookup
   - Type: Lookup(User)

- Used for Approval Process if Manager approval is required

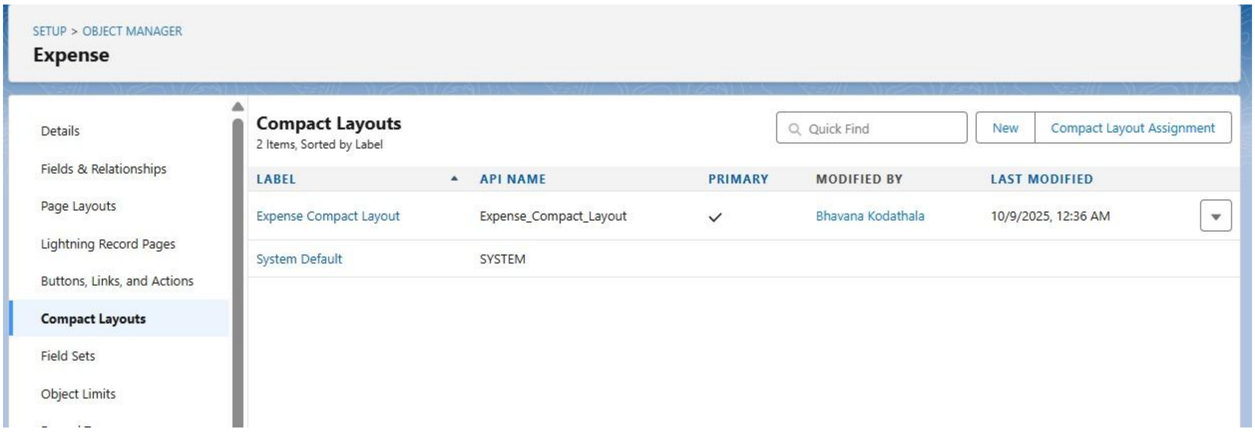
Step 4 — Page Layouts

1. Navigation: Setup → Object Manager → Expense → Page Layouts → Edit Expense Layout
2. Add fields to layout:
   - Expense Number, Amount, Expense Date, Category, Employee, Description, Approval Status
3. Related Lists: None (for now)
4. Save



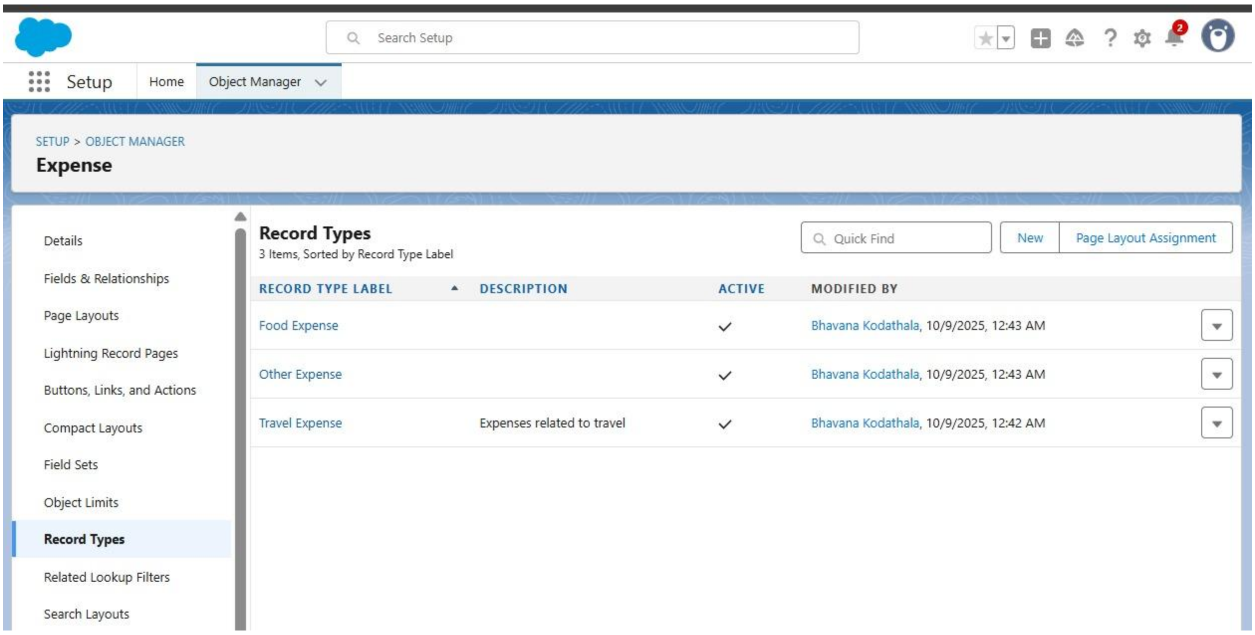
Compact Layout (for mobile)

1. Setup → Object Manager → Expense → Compact Layouts → New
2. Fields: Expense Number, Amount, Expense Date, Approval Status
3. Save → Compact Layout Assignment → Assign to all profiles



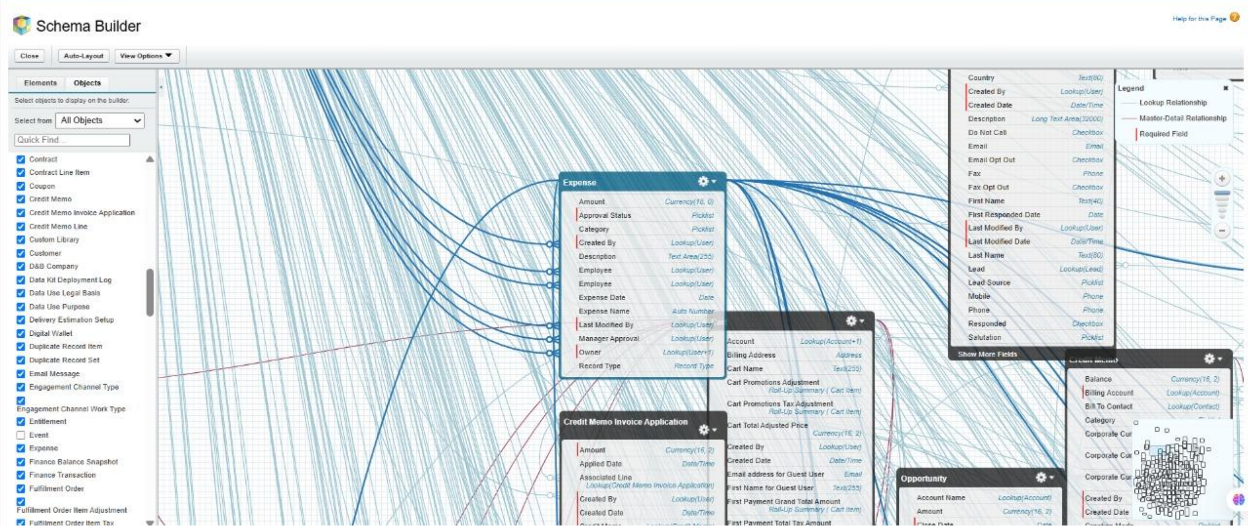
Step 5 — Record Types

1. Navigation: Setup → Object Manager → Expense → Record Types → New
2. Create Record Types:
   - Travel Expense
   - Food Expense
   - Other Expense
3. Assign to Employee Profile and Manager/Admin Profile
4. Select Page Layout (use existing Expense Layout or custom if needed)
5. Save



Step 6 — Schema Builder

1. Navigation: Setup → Schema Builder
2. Drag Expense object to canvas
3. Add User object
4. Verify relationships:



   - Employee Lookup: Expense → User
   - Optional: Manager Approval Lookup
5. Arrange objects for clarity and Save layout

Step 7 — Field-Level Security & Profile Access

1. Navigation: Setup → Object Manager → Expense → Fields → Set Field-Level Security
2. Make fields Visible for:
   - Employee Profile → Can create/edit
   - Manager / Admin Profile → Can view/edit
3. Setup → Profiles → Expense Employee Profile → Object Settings → Expense → Edit
   - Grant Read, Create, Edit (Delete optional)
4. Save

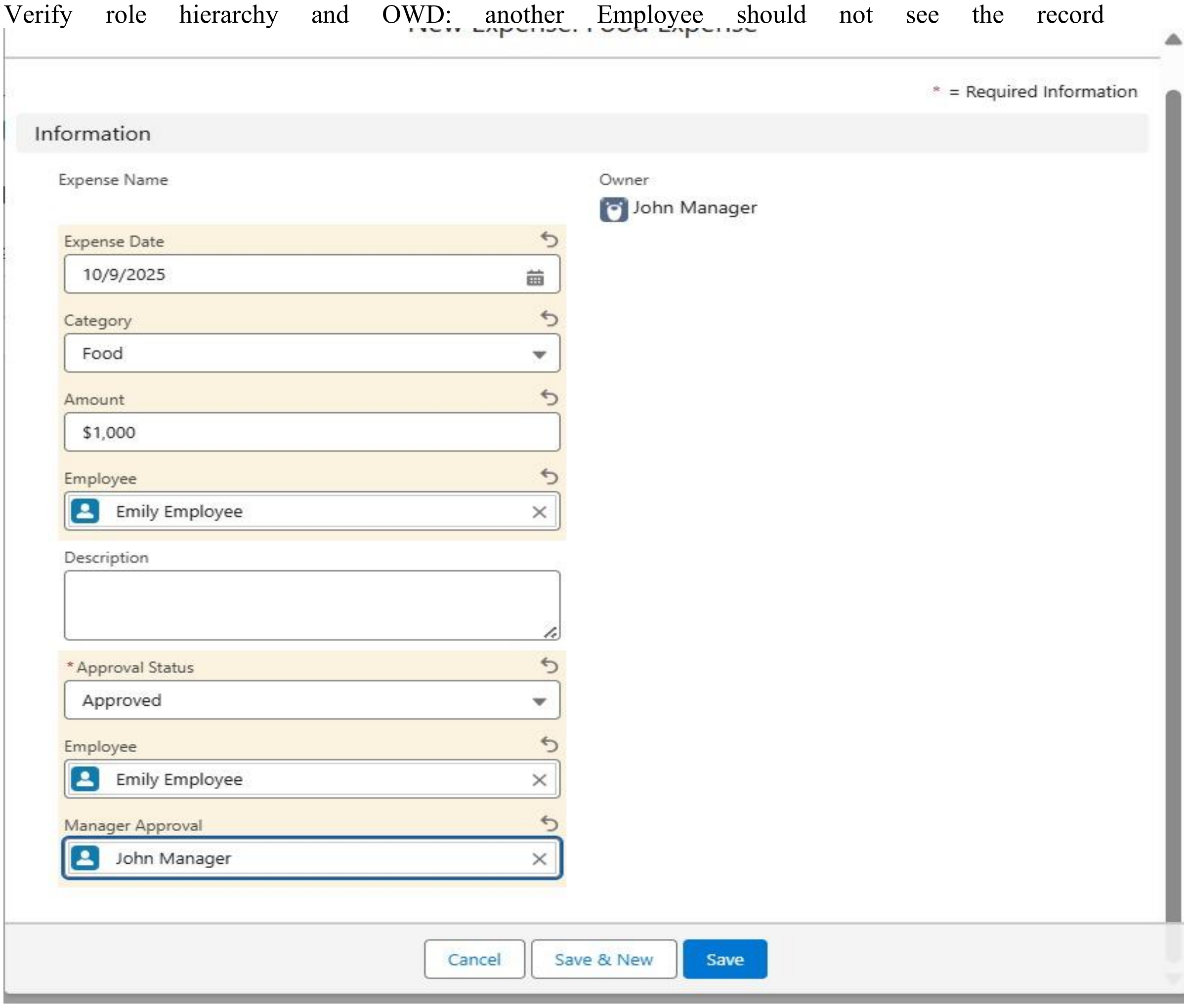
Step 8 — Quick Test

1. Log in as Employee → create a test expense record

2. Log in as Manager → confirm the record is visible

Test Approval Status workflow (if configured)

3. Verify role hierarchy and OWD: another Employee should not see the record



✅ Phase 3 Complete

- Expense object created with all necessary fields
- Relationships to User object established
- Page layouts and compact layouts configured
- Record types (optional) set up
- Field-level security and profile access verified
- Quick test confirms proper creation, visibility, and optional approval workflow