EXPENSE TRACKER APP

Phase 6: User Interface Development — Salesforce Expense Tracker

Goal: Make the Expense Tracker user-friendly using Lightning App Builder, Record Pages, Tabs, LWC components, and navigation.

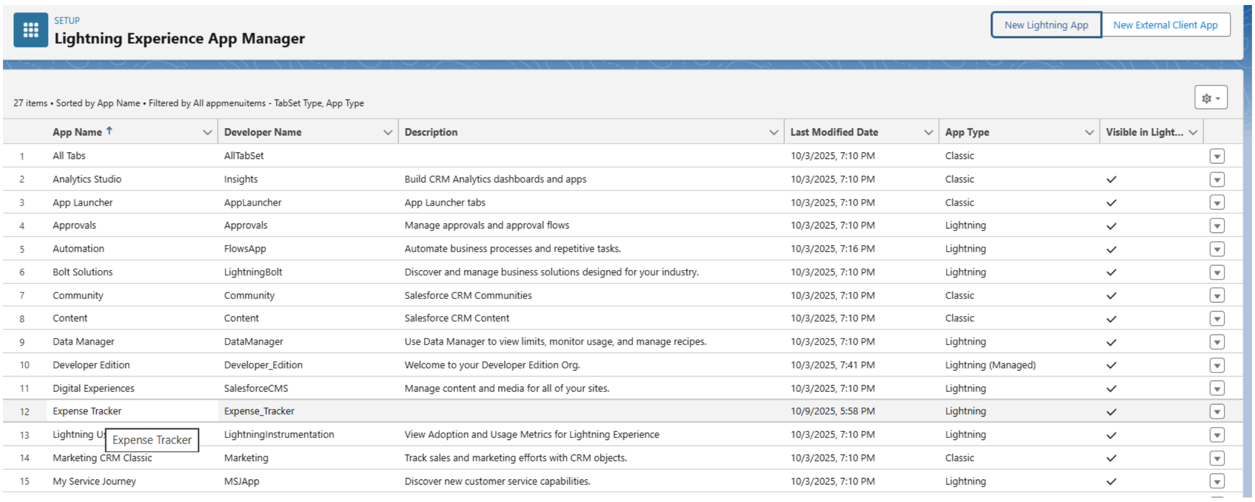
Step 1 — Create Lightning App

Purpose: Group all Expense Tracker tabs and pages into one app.

Navigation:
Setup → App Manager → New Lightning App

Configuration Steps:

1. Click New Lightning App.
2. Enter App Name: Expense Tracker.
3. Upload logo (optional) → Click Next.
4. Navigation Items: Add the following tabs:
   - Expenses
   - Reports
5. Utility Bar (Optional): Add Quick Action New Expense.
6. Click Finish.


SETUP
Lightning Experience App Manager
New Lightning App | New External Client App

27 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name	Developer Name	Description	Last Modified Date	App Type	Visible in Light...
1	All Tabs	AllTabSet		10/3/2025, 7:10 PM	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	10/3/2025, 7:10 PM	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	10/3/2025, 7:10 PM	Classic	✓
4	Approvals	Approvals	Manage approvals and approval flows	10/3/2025, 7:10 PM	Lightning	✓
5	Automation	FlowsApp	Automate business processes and repetitive tasks.	10/3/2025, 7:16 PM	Lightning	✓
6	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	10/3/2025, 7:10 PM	Lightning	✓
7	Community	Community	Salesforce CRM Communities	10/3/2025, 7:10 PM	Classic	✓
8	Content	Content	Salesforce CRM Content	10/3/2025, 7:10 PM	Classic	✓
9	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	10/3/2025, 7:10 PM	Lightning	✓
10	Developer Edition	Developer_Edition	Welcome to your Developer Edition Org.	10/3/2025, 7:41 PM	Lightning (Managed)	✓
11	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	10/3/2025, 7:10 PM	Lightning	✓
12	Expense Tracker	Expense_Tracker		10/9/2025, 5:58 PM	Lightning	✓
13	Lightning Us Expense Tracker	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	10/3/2025, 7:10 PM	Lightning	✓
14	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	10/3/2025, 7:10 PM	Classic	✓
15	My Service Journey	MSJApp	Discover new customer service capabilities.	10/3/2025, 7:10 PM	Lightning	✓

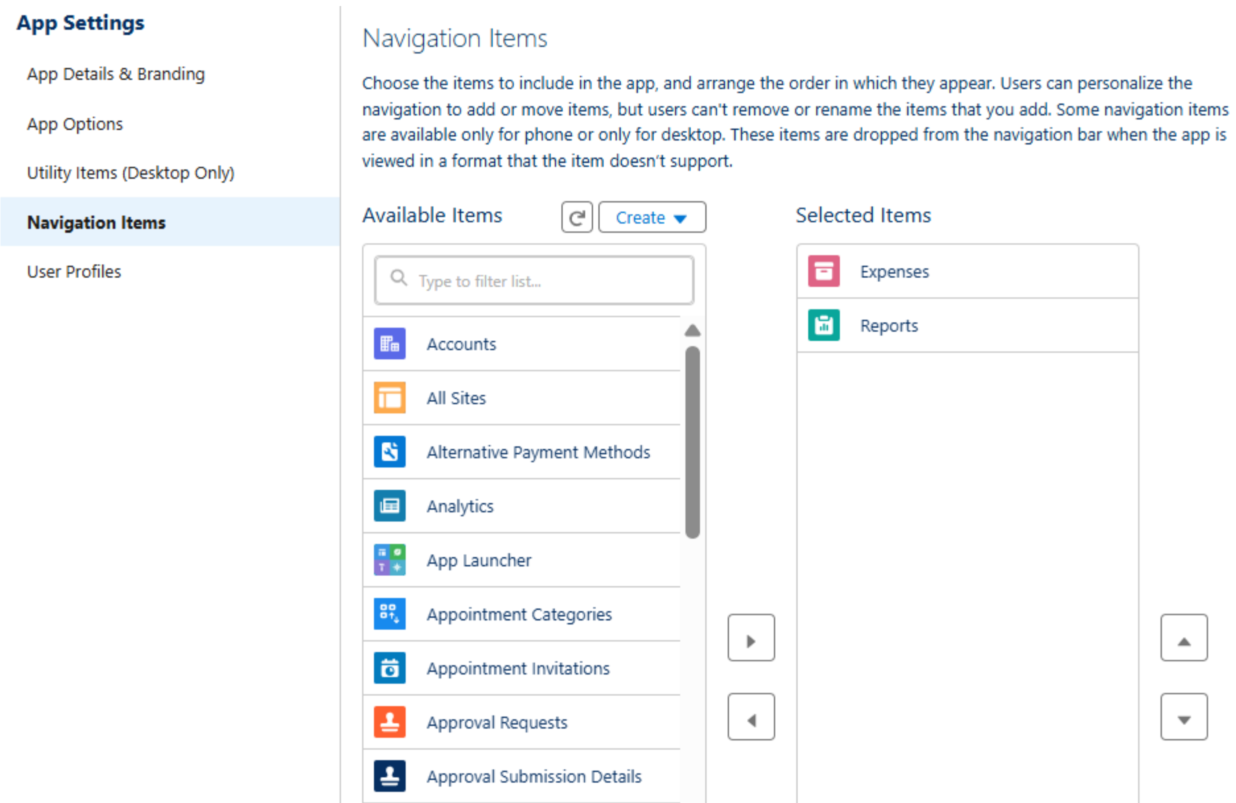
Step 2 — Configure Tabs

Purpose: Ensure users can easily navigate objects.

Navigation:
Setup → Object Manager → Expense → Tabs

Steps:

1. Create a Custom Object Tab for Expense if not already present.
2. Add the Expenses tab to the Lightning App.
3. Optionally add tabs for Reports or other related objects.
4. Verify the tabs appear correctly in the Expense Tracker App.



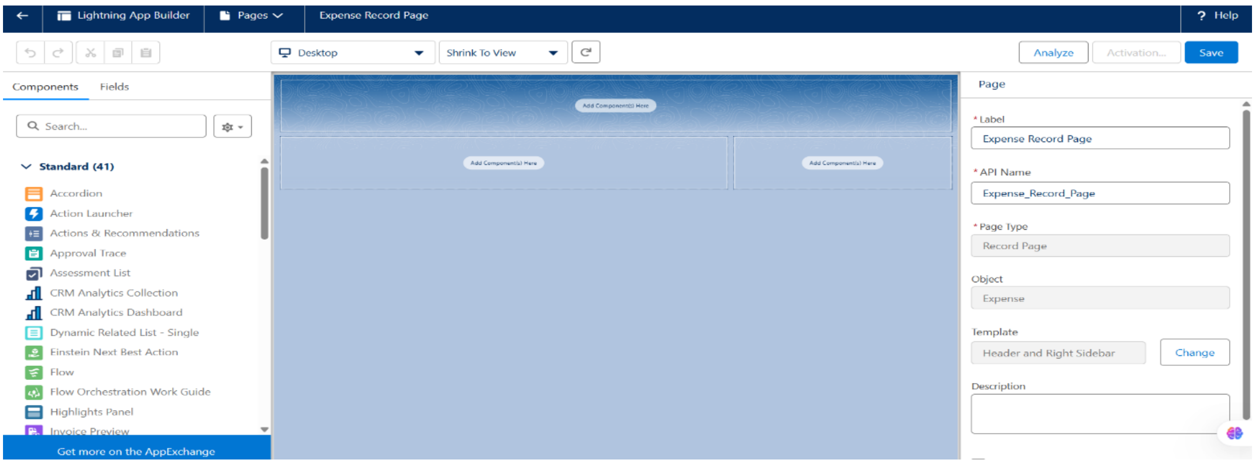
Step 3 — Customize Record Pages

Purpose: Display relevant fields and related information.

Navigation:
Setup → Object Manager → Expense → Lightning Record Pages → Edit

Steps:

1. Click New if no default page exists.
2. Select Header + Right Sidebar (or any template) → Next.
3. Drag & drop fields onto the page:
    - Expense Number (Name)
    - Amount (Amount__c)
    - Expense Date (Expense_Date__c)
    - Category (Category__c)
    - Employee (Employee__c lookup)
    - Description (Description__c)
    - Approval Status (Approval_Status__c)
4. Add Related Lists (optional):
    - Approvals
    - Tasks
5. Add Quick Actions:
    - Submit for Approval
    - Edit Expense
6. Click Activate → Assign as Org Default.



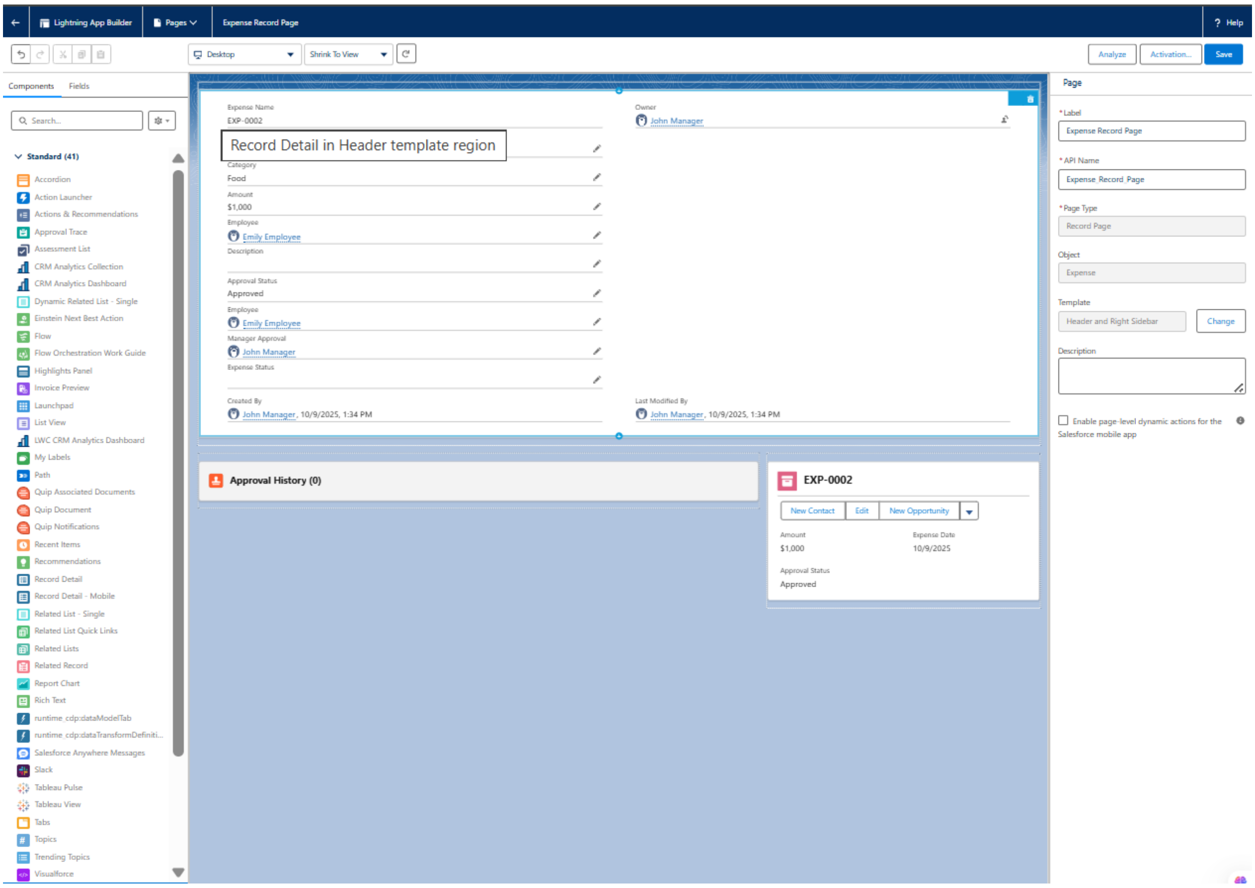
Step 4 — Home Page Layout

Purpose: Provide a dashboard view for managers and employees.

Navigation:
Setup → Lightning App Builder → Home Page → Edit

Steps:

1. Add Dashboard Components:
   - Total Expenses
   - Pending Approvals
   - Recent Expenses
2. Optionally, add Reports Chart or List View components.
3. Save & activate.



Step 6 — Lightning Web Components (LWC)

Purpose: Build interactive components for searching, viewing, or approving expenses.

Example Components:

1. expenseList — Display all expenses in a datatable.

2. expenseApproveButton — Allow manager to approve selected expense.

Navigation:

- Use VS Code with Salesforce Extensions or Developer Console.

Suggested Steps:

1. Create Apex Controller (ExpenseController) with @AuraEnabled methods:

    - Fetch all expenses

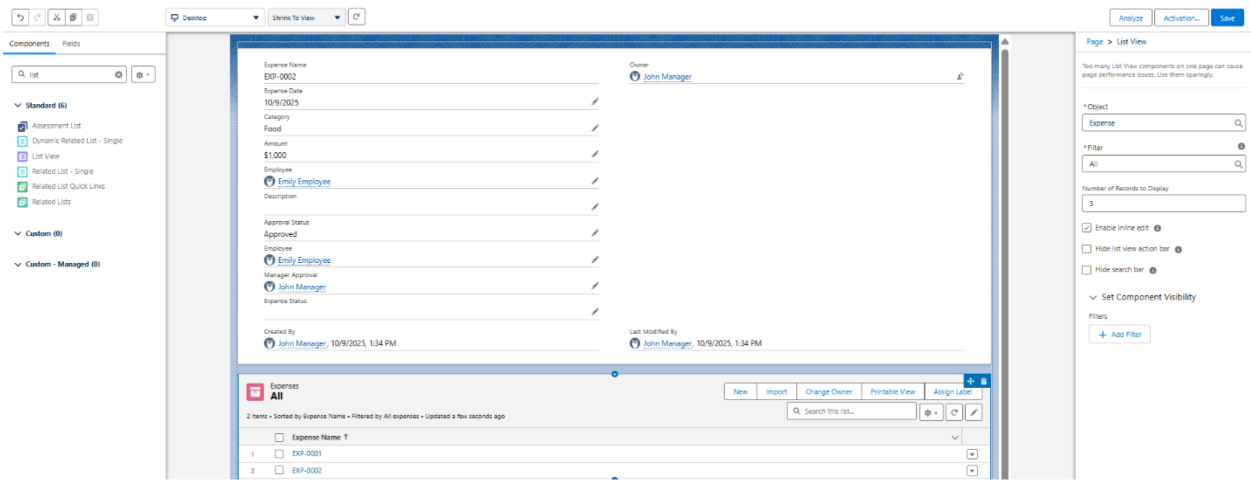
    - Approve a specific expense

2. Create expenseList LWC:

    - Use @wire to fetch all expenses

    - Display in lightning-datatable

3. Add imperative Apex in expenseApproveButton LWC to update Approval Status.



Step 7 — Wire Adapters & Imperative Apex Calls

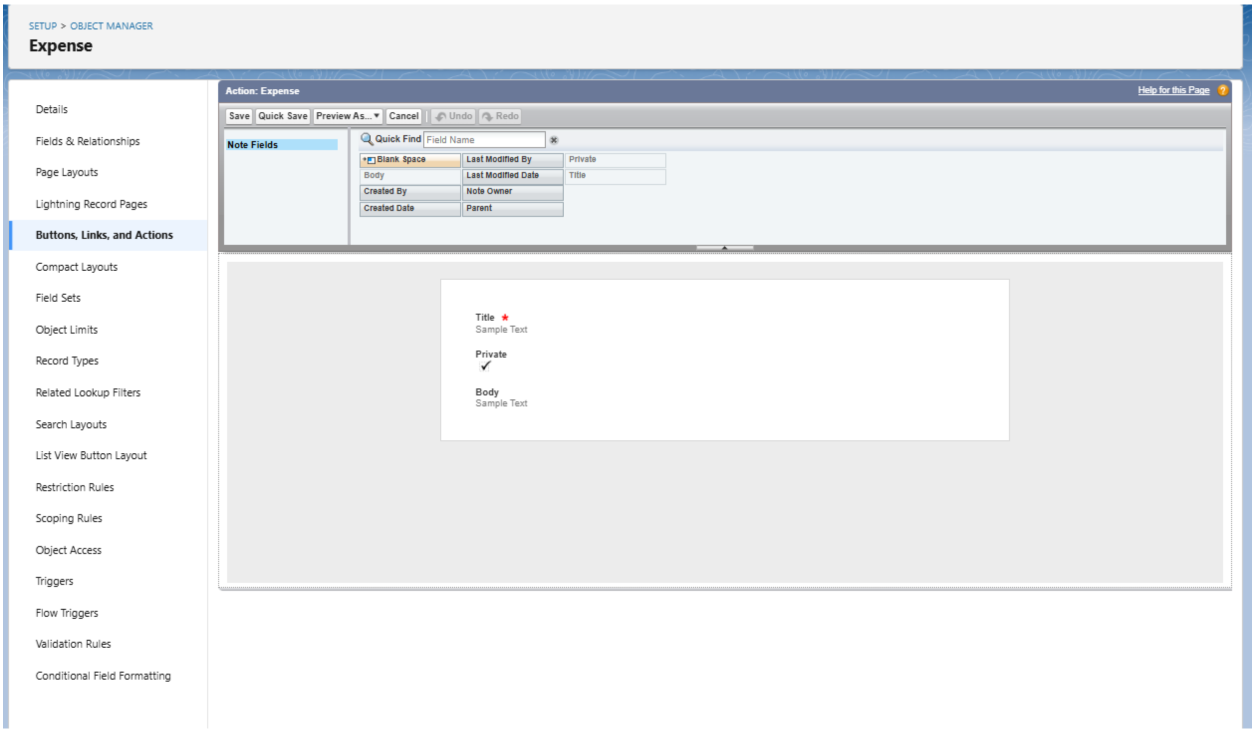
Purpose: Dynamically fetch or update records.

Implementation:

1. Use @wire for automatically fetching expense records.

2. Use imperative Apex calls to update fields like Approval Status when a button is clicked.

3. Embed LWCs on Expense Record Page or Home Page for interactivity.



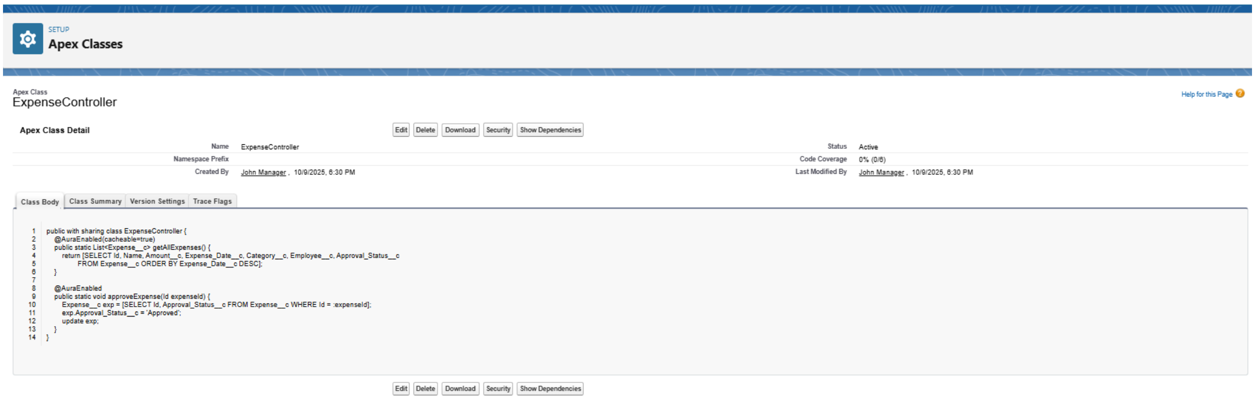
Step 8 — Navigation Service (Optional)

Purpose: Automatically navigate users after actions.

Example Use Case:
After an expense is approved, redirect to:

- Expense record page
- Home page
- Dashboard

Implementation:
Use NavigationMixin in LWC**:**



Step 9 — Testing

Steps:

1. Log in as an Employee:
   - Verify ability to create new expenses via Lightning App.
   - Submit expense for approval.
2. Log in as Manager:
   - Verify the approval button is visible.
   - Approve or reject expenses.
3. Confirm that LWCs display updated data dynamically.
4. Check navigation and quick actions.