

Phase 1: Problem Understanding & Industry Analysis

1. Problem Statement

Organizations need a centralized system to record, categorize, and manage business expenses submitted by employees. Current manual processes lead to delays, errors, and lack of visibility into company spending.

The Expense Tracker App will:

- Allow employees to log expenses under specific categories.
 - Enable managers to approve or reject expenses.
 - Provide a dashboard with monthly spending trends by category.
 - Ensure compliance with company policies through validation rules.
 - Improve budget tracking, transparency, and cost control.
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2. Requirement Gathering

- Create custom objects: Employee, Expense, Category.
 - Employees submit expenses with amount, date, category, and receipt.
 - Manager approval/rejection workflow.
 - Validation rules to prevent wrong data (e.g., negative expense amount).
 - Role-based access (Employees = Submit, Managers = Approve, Admin = Full access).
 - Dashboard showing monthly expenses by category, employee, and department.
 - Reports for finance team to analyze spending patterns.
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3. Stakeholder Analysis

Stakeholder	Role / Interest	Needs
Employees	Submit expenses	Easy form to log expenses & upload receipts
Managers	Approve/reject expenses	Approval workflow, notifications
Finance Team	Monitor company spending	Reports & dashboards for expense trends
Admin / IT Team	Manage system setup & security	Configurable org setup, permissions
Management / Executives	Oversight & cost control	Insights into monthly/quarterly expenses

4. Business Process Mapping

Core Workflow:

Expense Submission → Manager Review → Approval/Rejection → Reporting & Dashboard

- Employee selects category & enters expense details.
 - Expense moves to manager for approval.
 - Approved expenses appear in reports & dashboards.
 - Rejected expenses go back to employee for correction.
 - Dashboards summarize monthly/departmental spending.
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5. Industry-Specific Use Case Analysis

- Corporate Expense Management → Track travel, meals, office supplies.
 - Policy Compliance → Ensure approvals follow company rules.
 - Audit Readiness → Expense logs with manager approvals.
 - Budget Control → Monitor real-time spending by category.
 - Scalability → Support growing employee base without manual overhead.
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6. AppExchange Exploration

Potential Salesforce AppExchange apps to accelerate development:

- Expense Management Apps (e.g., prebuilt expense submission & approval).
 - Approval Process Enhancers (streamlined workflows, reminders).
 - Document/Receipt Upload Apps (secure image/file handling).
 - Dashboard/Reporting Apps (advanced expense analytics).
 - Audit & Compliance Apps (logging, monitoring).
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