

# EXPENSE TRACKER APP

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## Phase 9: Reporting, Dashboards & Security Review

**Project:** Expense Tracker

**Goal:** Create reports, dashboards, and apply security settings for safe and insightful operations..

### 1. Reporting

Purpose:

To monitor spending, approvals, and employee expense patterns through Salesforce reports.

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#### A. Key Reports to Build

Report Name	Purpose
Expenses by Category	Sum of Amount grouped by Category
Pending Approvals	List of all expenses awaiting approval
Monthly Expense Trend	Track monthly total expenses
Employee Expense Summary	Total spending per employee
Overdue Expenses	Expenses past due date or marked overdu

#### B. Create “Expenses by Category” Report

Navigation:

📌 App Launcher → Reports → New Report

Steps:

1. Choose **Report** Type: **Expenses**.  
(If not visible: Setup → Object Manager → Expense → Edit → Check “Allow Reports”).
2. Click Continue to open Report Builder.
3. In the left field panel, add these columns:
  - Name (Expense Number)

- Employee\_\_c
  - Expense\_Date\_\_c
  - Category\_\_c
  - Amount\_\_c
  - Approval\_Status\_\_c
4. Drag Category\_\_c to “Group Rows”.
  5. On the Amount\_\_c column → click ▼ → Summarize → Sum.
  6. Filters tab →
    - Show → All Expenses
    - Date Field → Expense\_Date\_\_c
    - Range → All Time / This Fiscal Year
  7. Click Run, verify totals.
  8. Click Save & Run, name it Expenses by Category, save in Expense Tracker Reports folder.

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu is expanded to 'Reports & Dashboards' > 'Report Types'. The main content area is titled 'Custom Report Types' and shows a report type named 'Tours with Properties and Clients'. Below the title, there are buttons for 'Preview Layout', 'Edit Layout', 'Clone', and 'Delete'. A 'Close' button is also present. The report type details are displayed in a card format, including fields like Display Name, API Name, Description, Created By, Store ID, Deployment Status, and Modified By. To the right, the 'Object Relationships' section shows a Venn diagram with two overlapping circles, A and B, representing the relationship between the source object and the related object. Below the diagram, there is a table with columns 'Source Object' and 'Included Fields'.

**Custom Report Types**

**Tours with Properties and Clients**

Below is the information for this custom report type. You can click the buttons on this to preview or update information for the custom report type

**Details**

**Display Name:** Tours with Properties and Clients

**API Name:** Tours\_with\_Properties\_and\_Clients

**Description:** Tours with Properties and Clients

**Create Date:** Afiya Firdose Pamidi, 9/26/25, 4:46 PM

**Store ID:** other

**Deployment Status:** Deployed

**Modified By:** Afiya Firdose Pamidi, 9/26/25, 4:46 PM

**Object Relationships**

Tours (A)

... with at least one related record from A

**Fields**

Source Object	Included Fields
Tours	15

### C. Create Custom Report Type

Purpose: To combine Expense and Employee (User) info in a single report.

Navigation:

📌 Setup → Report Types → New Custom Report Type

Steps:

1. Primary Object: Expense
2. Report Type Label: *Expenses with Employee Info*
3. Click Next → Save.
4. Click Edit Layout, drag related fields from Employee(User) lookup.
5. Save Layout.

### 2. Dashboards

Purpose:

Visualize spending and approvals for quick management insight.

Navigation:

📌 App Launcher → Dashboards → New Dashboard

Steps:

1. Name: Expense Tracker Dashboard.
2. Folder: Public Dashboards or Expense Tracker Reports.
3. Add Components:
  - Pie Chart: from “Expenses by Category” report.
  - Bar Chart: “Employee Expense Summary”.
  - Table: “Pending Approvals”.
  - Line Chart: “Monthly Expense Trend”.
4. Resize and arrange as desired → Click Save + Done.

## Dynamic Dashboards

Use Dynamic Dashboards so each user sees only their own expenses.

Steps:

1. In Dashboard Properties → View Dashboard As: *The logged-in user*.
2. Save and activate.
3. **Security Review**

### A. Organization-Wide Defaults (Sharing Settings)

Purpose: Control data visibility.

Navigation:

 Setup → Sharing Settings


Steps:

1. Find Expense object.
2. Set Default Internal Access: Private.
3. Set Default External Access: Private (if Community/Portal used).
4. Save Settings.

### B. Field Level Security (FLS)

Purpose: Restrict sensitive fields (like Manager Notes or Internal Comments).

Navigation:

 Setup → Object Manager → Expense → Fields & Relationships

Steps:

1. Click the field you want to secure (e.g., Manager \_Comments \_\_c).
2. Click Set Field-Level Security.
3. Uncheck visibility for profiles (e.g., Employee, Agent).
4. Save.

### C. Login IP Ranges

Purpose: Restrict logins to specific office network IPs.

Navigation:

📌 Setup → Profiles → Select profile (e.g., Expense Manager) → Login IP Ranges

Steps:

1. Click New.
2. Enter Start & End IP addresses of office network.
3. Save.  
Now users outside these IPs cannot log in.

#### D. Session Settings

Purpose: Increase security by shortening idle timeout.

Navigation:

📌 Setup → Session Settings

Steps:

1. Locate "Timeout Value" → set to 30 minutes.
2. Click Save.

#### E. Audit Trail

Purpose: **Track configuration changes and user activity.**

Navigation:

📌 **Setup** → View Setup Audit Trail