EXPENSE TRACKER APP

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.

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”).

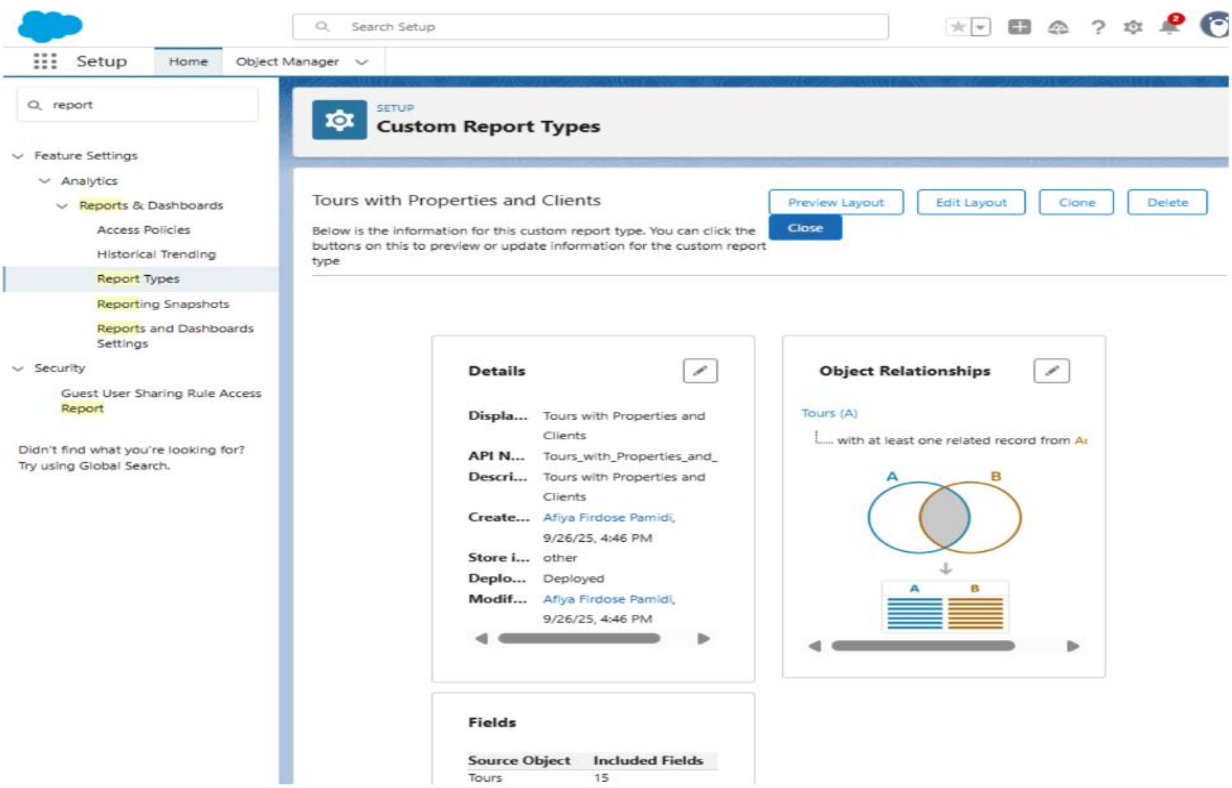
2. Click Continue to open Report Builder.

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.



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