

# EXPENSE TRACKER APP

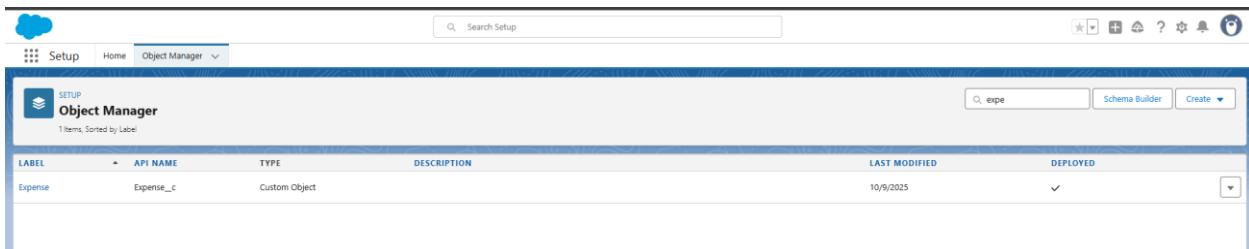
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## Phase 3: Data Modeling & Relationships

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



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### 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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
Approval Status	Approval_Status__c	Picklist		
Category	Category__c	Picklist		
Created By	CreatedBy	Lookup(User)		
Description	Description__c	Text Area(255)		
Employee	User__c	Lookup(User)		
Employee	Employee__c	Lookup(User)		
Expense Date	Expense_Date__c	Date		
Expense Name	Name	Auto Number		
Last Modified By	LastModifiedBy	Lookup(User)		
Manager Approval	Manager_Approval__c	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		

### 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

The screenshot shows the Salesforce Object Manager interface for the 'Expense' object. The left sidebar lists various configuration options under 'Page Layouts'. The main area is titled 'Expense Layout' and contains a grid of fields. The fields listed are:

	Category	Employee	Manager Approval
+ Section	Category	Expense Date	Owner
+ Blank Space	Created By	Description	Expense Name
Amount	Employee	Expense Name	
Approval Status	Last Modified By		

Below the layout editor, there are sections for 'Expense Sample', 'Highlights Panel' (with a note to customize), 'Quick Actions in the Salesforce Classic Publisher' (with a note about overriding global publisher actions), and 'Salesforce Mobile and Lightning Experience Actions' (with a note about predefined actions and overriding them).

#### 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

SETUP > OBJECT MANAGER

## Expense

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

**Compact Layouts**

Field Sets

Object Limits

Compact Layouts				
2 Items, Sorted by Label				
LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Expense Compact Layout	Expense_Compact_Layout	✓	Bhavana Kodathala	10/9/2025, 12:36 AM
System Default	SYSTEM			

### 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

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

## Expense

Details

Fields & Relationships

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**Record Types**

Related Lookup Filters

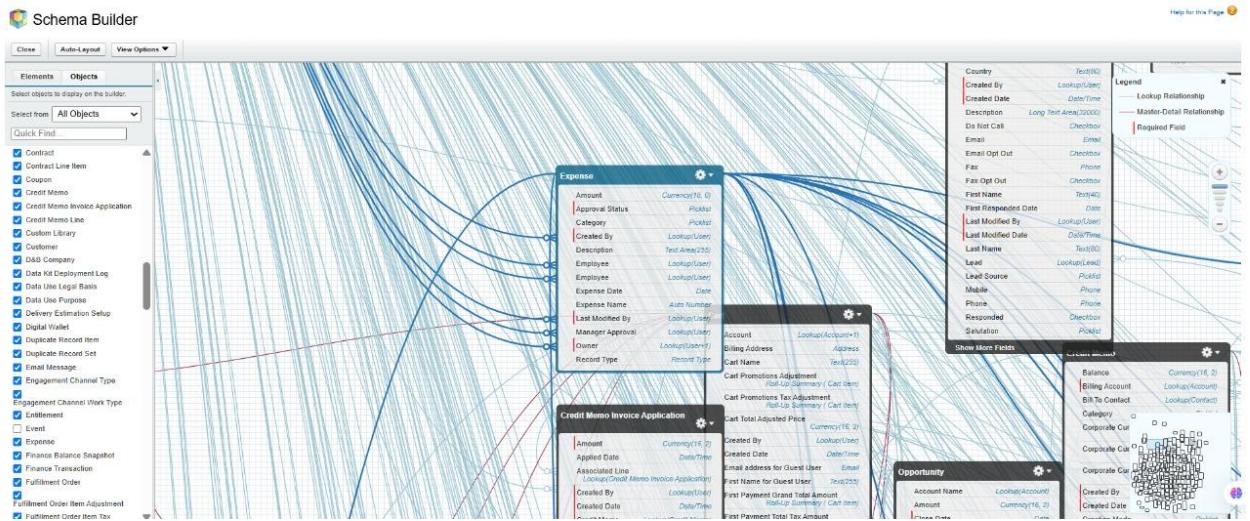
Search Layouts

Record Types				
3 Items, Sorted by Record Type Label				
RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY	
Food Expense		✓	Bhavana Kodathala, 10/9/2025, 12:43 AM	▼
Other Expense		✓	Bhavana Kodathala, 10/9/2025, 12:43 AM	▼
Travel Expense	Expenses related to travel	✓	Bhavana Kodathala, 10/9/2025, 12:42 AM	▼

## 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

The screenshot shows a Salesforce expense record creation page. At the top right, there is a note: "\* = Required Information". The page has a header "Information". The fields are as follows:

- Expense Name: (empty)
- Owner: John Manager
- Expense Date: 10/9/2025
- Category: Food
- Amount: \$1,000
- Employee: Emily Employee
- Description: (empty)
- \*Approval Status: Approved
- Employee: Emily Employee
- Manager Approval: John Manager

At the bottom, there are three buttons: Cancel, Save & New, and Save.

### 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