Expense Tracker Project (Phase 7: Integration & External Access – Future Scope)

Goal

The goal of this project is to build a **Salesforce-based Expense Tracker** that automates expense submission, approvals, and tracking. Future enhancements through integration and external access will further streamline processes, improve communication, and provide real-time visibility to employees, managers, and finance teams.

Problem Statement

Currently, expense management is internal to Salesforce. Organizations could further benefit from **online payment integration, external access for employees, and real-time notifications**. Implementing these features would reduce delays, improve transparency, and make the system more accessible.

Phase 7: Integration & External Access (Future Scope)

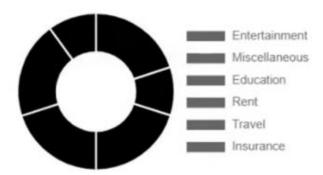Although not implemented in the current version, Phase 7 could focus on:

- **Integration with Payment Gateway APIs:** Allow employees to submit expenses and reimbursements directly through online payment systems.

- **External Access via OAuth:** Enable employees to securely access the Expense Tracker through a dedicated portal or mobile app.

- **Platform Events and Notifications:** Provide real-time alerts to managers and finance teams for new expense submissions, approvals, or reimbursements.

Conclusion

Phase 7 would enhance the **Expense Tracker Project** by enabling **online payments, secure external access, and real-time notifications**, making the system more accessible, responsive, and efficient. This future scope ensures improved usability, faster processing, and better control over organizational expenses.

Expense Summary

Expense Tracker

Entertainment
Miscellaneous
Education
Rent
Travel
Insurance

Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.

SCREEN: Date Range
Date: Start_Date
Label: Start Date
Value at run time: 1 September 2024

Date: End_Date
Label: End Date
Value at run time: 30 September 2024

Selected Navigation Button: NEXT

Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.