

# PHASE-2

## Expense Tracker Project

### Phase 2: Org Setup & Configuration

This phase focuses on laying the foundation for a smooth **Expense Tracker system** by configuring organizational settings, user roles, and data access to ensure accountability and maintainability.

#### Organization Details

The screenshot displays the 'New Custom Object' configuration page in Salesforce. The 'Custom Object Information' section is active, showing the following details:

- Label:** Expense (Example: Account)
- Plural Label:** Expenses (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** Expense (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:** ☒ Open the standard Salesforce.com Help & Training window
- Content Name:** --None--

A yellow banner at the top of the page reads: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)".

- **Organization Name:** Expense Tracker Management
- **Primary Contact:** Finance Admin
- **Address:** Hyderabad, Telangana, India
- **Default Locale:** English (India)
- **Default Language:** English
- **Time Zone:** India Standard Time (GMT+05:30, Asia/Kolkata)
- **Currency Locale:** INR (English - India)
- **Multiple Currencies:** Enabled

Ensures users experience Salesforce in their local context for expense submissions, approvals, and escalations.

## Expense Approval Business Hours & Holidays

Setup

Home

Object Manager

Almost done

Choose data

Edit mapping

Start import

Edit Field Mapping: Expenses

Help for this page

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
<a href="#">Change</a>	Expense Type	expense_type	Rent	Miscellaneous	Entertainment
<a href="#">Change</a>	Expense Date	expense_date	2018-01-01	2018-01-04	2018-01-07
<a href="#">Change</a>	Expense Amount	expense_amount	100	200	300

Cancel

Previous

Loading

- **Business Hours Name:** Expense Approval Working Hours
- **Schedule:** Monday to Friday – 9 Hours
- **Default Business Hours:** Enabled
- **Active:** Yes
- **Holidays Configured:** 2 Holidays – All Day

Overdue approvals escalate only during active working days, avoiding unnecessary alerts on holidays.

## Fiscal Year & Financial Reporting Setup

Setup Home Object Manager

Choose data Edit mapping Start import

Almost done

### Edit Field Mapping: Expenses

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
<a href="#">Change</a>	Expense Type	expense_type	Rent	Miscellaneous	Entertainment
<a href="#">Change</a>	Expense Date	expense_date	2018-01-01	2018-01-04	2018-01-07
<a href="#">Change</a>	Expense Amount	expense_amount	100	200	300

Cancel Previous Loading

- Custom Fiscal Year aligned with company reporting.  
Ensures dashboards and reports reflect accurate quarterly and annual expense data.

## User Profiles for Expense Management

Setup Home Object Manager

Choose data Edit mapping Start import

Almost done

### Edit Field Mapping: Expenses

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

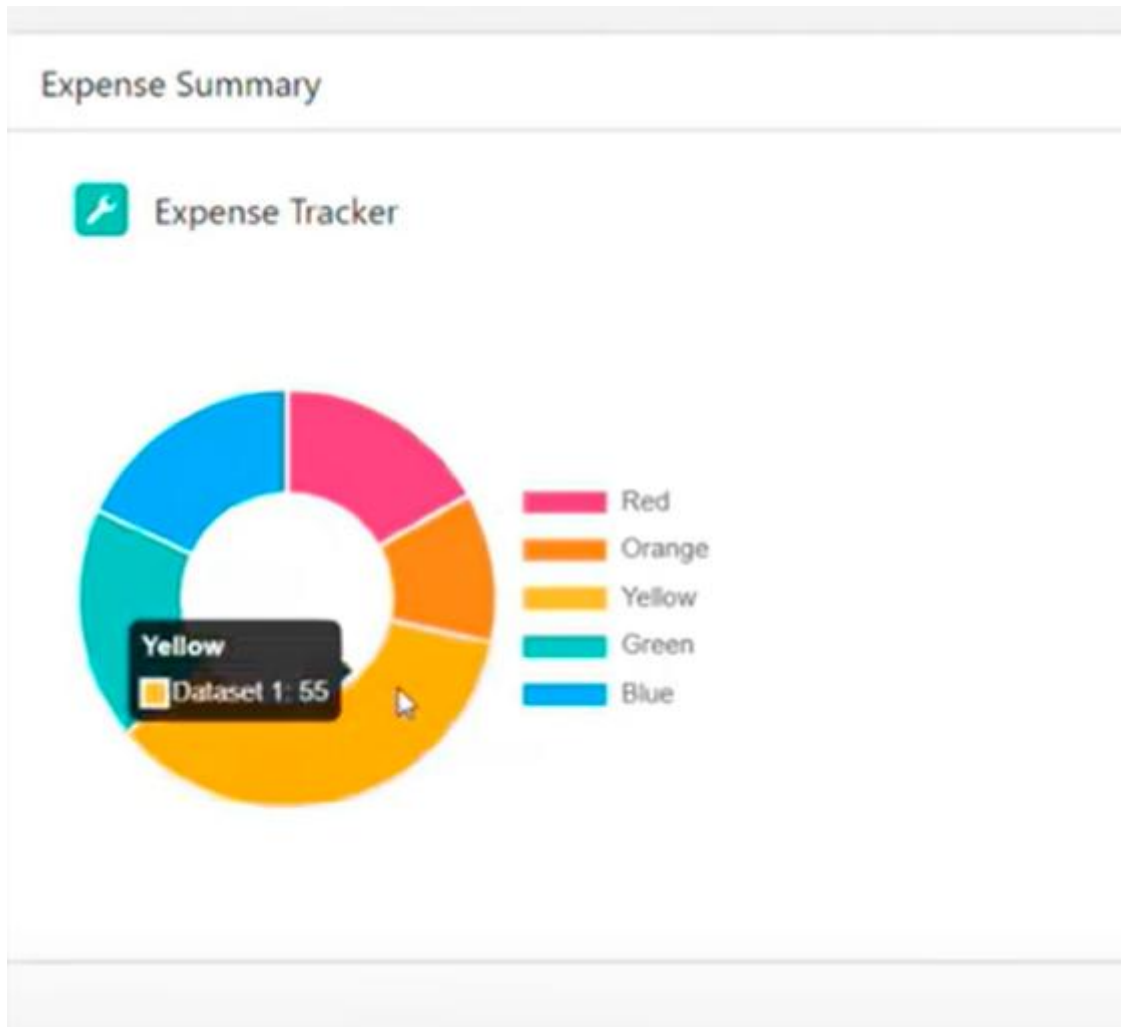
Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
<a href="#">Change</a>	Expense Type	expense_type	Rent	Miscellaneous	Entertainment
<a href="#">Change</a>	Expense Date	expense_date	2018-01-01	2018-01-04	2018-01-07
<a href="#">Change</a>	Expense Amount	expense_amount	100	200	300

Cancel Previous Loading

- **Expense Admin:** Full access to configure automation, dashboards, and security.
- **Expense Manager:** Manage approvals, escalations, and monitor expense records.

- **Expense Employee:** Submit and track their own expenses.
  - **Expense Executive:** View-only access to dashboards and reports for insights.
- 

## Roles & Expense Visibility



- **Executive:** Can view all expense reports and analytics.
  - **Manager:** Can view, approve, and escalate team expenses.
  - **Employee:** Can view and submit only their own expenses.
- 

## Permission Sets for Extended Access

- **Reporting Access:** Access to dashboards/reports.
  - **Escalation Management:** Enables managers to escalate overdue approvals.
-

## Expense Record Security (OWD)

- Set to **Private** for Expense records:

The screenshot displays a Salesforce record page for Expense records. It features a top section with a 'Transaction Committed' status and a description. Below this is a 'SCREEN: Date Range' section with two date fields: 'Start Date' (1 September 2020) and 'End Date' (30 September 2024). A 'Selected Navigation Button: NEXT' is also visible. The bottom section repeats the 'Transaction Committed' status and description.

**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 2020

**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.

- - Employees see only their submitted expenses.
    - Managers see their team's expenses for approval.
    - Executives get reporting visibility through the role hierarchy.
-

## DevOps & Deployment for Expense Tracker

### 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.

- **Version Control:** All metadata tracked in Git.
- **Salesforce CLI (SFDX):** For scripting, retrieving, and deploying metadata.
- **CI/CD Pipeline:** Automated testing and deployment using GitHub Actions or Copado.

Ensures scalability, reduces errors, and maintains long-term system health.