PHASE-1: Expense Tracker Project

Problem Statement

- Employees currently log expenses in spreadsheets or emails.
- Approvals are delayed due to lack of automation.
- No visibility into company-wide spending.
- Managers cannot track pending approvals.
- No consolidated dashboards for insights.

Solution Framework

- Build a centralized Expense Tracker on Salesforce.
- Automate approvals using Flows / Approval Processes.
- Email notifications for submissions, approvals, and rejections.
- Dashboards showing spending by category, user, approval status.
- Escalate overdue approvals to higher managers.

Requirement Gathering

- Workshops with Employees & Managers → identify pain points.
- Stakeholder Interviews → define expectations (automation, reporting).
- Document Analysis → review spreadsheets & expense forms.
- Functional Requirements: Log expenses, Approval workflow, Validation rules.
- Non-Functional Requirements: Easy interface, Security, Scalability.

Stakeholder Analysis

Stakeholder Group	Key Interest	Influence
Employees	Easy logging & quick approvals	High
Managers	Visibility of expenses	High
Finance Team	Accurate expense records	High
Admins	Configure automation	Medium
Executives	Spending insights	High

Current vs Proposed Process

- Current (As-Is): Expenses in Excel/email, Manual approvals, No reminders, No analytics.
- Proposed (To-Be): Salesforce Expense object, Automated approval workflow, Escalations, Real-time dashboards.

Use Case Analysis

- Approval Delays → Automated Flows & reminders.
- Visibility Issues → Manager dashboards.
- Policy Violations → Validation rules.

- Audit Challenges → Centralized expense records.

AppExchange Exploration

- Email/SMS Notification Apps → reminders.
- Receipt Management Apps → upload bills.
- Finance Integrations → sync with ERP.
- Evaluation: Functional Fit, Salesforce Integration, Cost, User Reviews.

Automation Design

- Record-Triggered Flow: Notify on expense submission.
- Approval Process: Route to manager.
- Escalation Rule: Pending > 3 days → escalate.
- Email Templates: Send auto-updates.

Reports & Dashboards

- Reports: Expenses by Category, Approved vs Rejected, Monthly Trends, Expenses per Employee.
- Dashboards: Pie chart (Category-wise), Bar chart (Approval Status), Line chart (Monthly Trend).

Testing & Deployment

- Testing: Create test data, Verify workflows, Check validation rules, Review dashboards.
- Deployment: Deploy from sandbox, Train employees, Monitor adoption & optimize.