SALESFORCE CAPSTONE PROJECT

PHASE - 1: Problem Understanding & Industry Analysis

TITLE: Smart Budget & Expense Tracker

Background of the Project

Effectively managing personal and organizational expenses is a common challenge. Traditional methods like spreadsheets are error-prone, lack automation, and don't provide real-time insights, making it difficult to track spending, adhere to budgets, and receive timely notifications. Salesforce offers a scalable **Expense Tracker** application, leveraging its CRM and low-code automation, to help users monitor expenses against predefined budgets.

Objective of the Project

This Salesforce project aims to create a Personal Expense Tracker. It will offer an easy-to-use interface for logging expenses (amount, date, category), link expenses to budgets, calculate total expenses per budget using roll-up summaries, and automate notifications when expenses exceed budget thresholds via Flows. The project will also evaluate AppExchange financial management solutions against the custom build.

Industry Relevance

Expense management is a **cross-industry requirement**. Whether in healthcare, education, retail, or IT services, organizations must track costs against allocated budgets. A Salesforce-based expense tracker can serve as a **lightweight financial management tool**, showcasing how CRM platforms can extend beyond customer data management to operational efficiency.

Requirement Gathering

The goal is to understand what the Expense Tracker should do. For this project, the main requirements are:

- Ability to record expenses with fields like **Amount, Date, and Category**.
- A way to link expenses to a **Budget**.
- Automatic calculation of the total expenses for each budget.
- A **threshold field** in the Budget object to define budget limits.
- Automation to **send alerts when expenses exceed the threshold**.

Stakeholder Analysis

- **End Users**: Individuals or employees who enter and track expenses.
- **Budget Owners/Managers**: People who set budget thresholds and monitor spending.

Business Process Mapping

- A **Budget** is created with a threshold amount.
- Users add **Expense records** (e.g., Travel, Food, Supplies) and link them to the budget.
- The **roll-up summary field** on Budget automatically updates the total expenses.
- A **Flow** checks if total expenses exceed the budget threshold.
- If exceeded, an **email alert** is sent to the budget owner/manager.

Industry-Specific Use Case Analysis

- **IT/Consulting**: Track project-related costs.
- **Retail**: Monitor store-level expenses.
- **Healthcare**: Manage department or grant budgets.
- **Education**: Track expenses for events or programs.
- **Startups/SMEs**: Simple budget control without heavy financial software.

AppExchange Exploration

- Salesforce AppExchange already has apps for expense management (like **Concur Expense, Certinia, or Accounting Seed**).
- These apps offer advanced features such as integrations with payment systems, approval processes, and analytics.
- For this project, I am going to focus on building a **lightweight version** to learn Salesforce fundamentals.

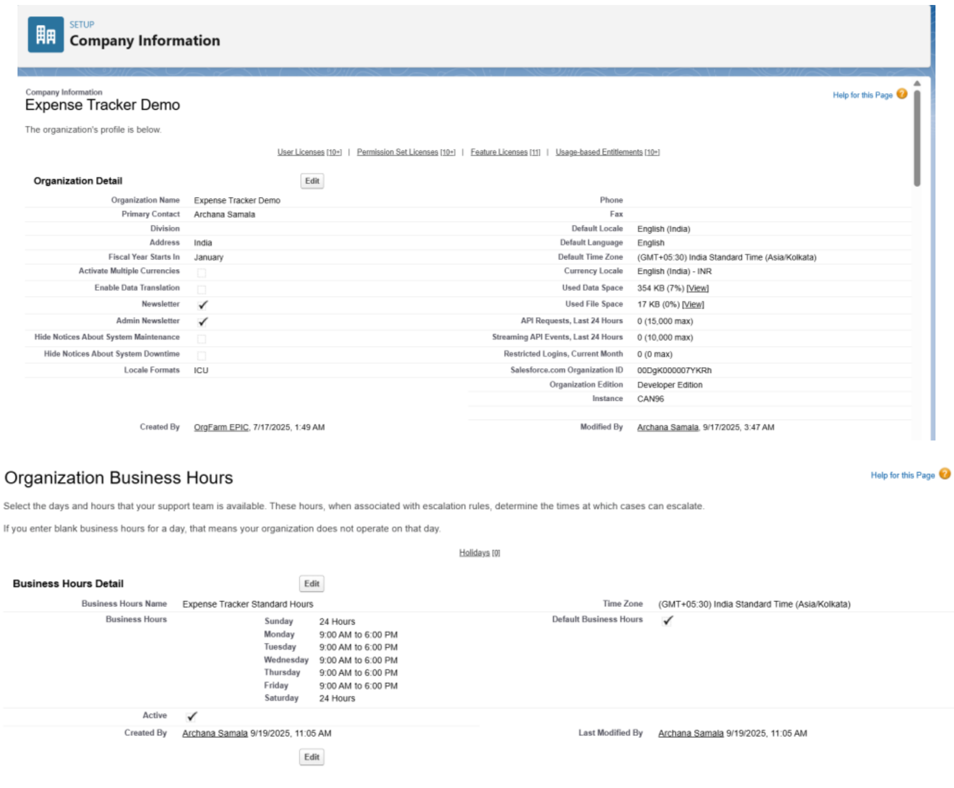
PHASE -2 Org Setup & Configuration

1. Salesforce Edition

- Use a **Developer Edition Org**.
- It provides all features needed for development and testing.
- This Org will serve as the main development environment for the project.

2. Company Profile Setup

- Navigate to **Setup → Company Information**
- Organization Name → *Expense Tracker Demo*
- Default Time Zone → Local time zone (e.g., GMT+05:30 Asia/Kolkata)
- Currency Locale → INR or USD
- It ensures data such as currency and time align with business needs.

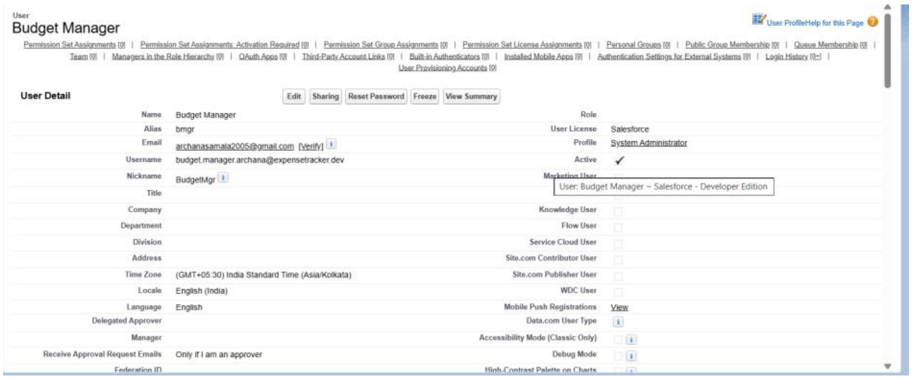


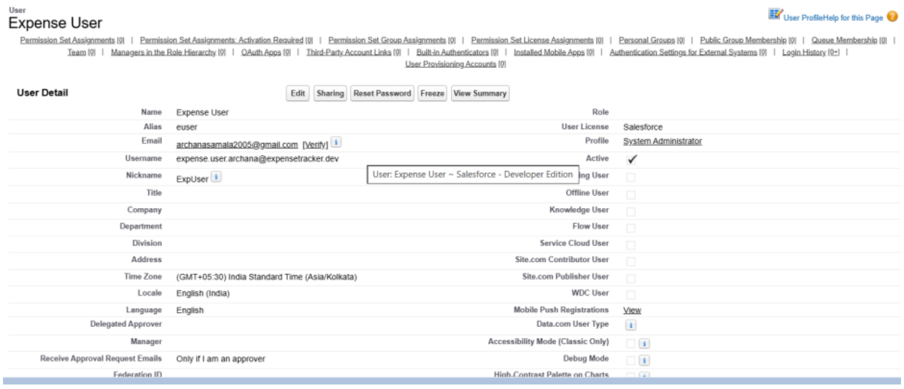
3. User Setup & Licenses

Creating of Users: Setup → **Users → New User**

I have created two users:

- *Budget Manager* → Responsible for budgets and thresholds.
- *Expense User* → Logs daily expenses.



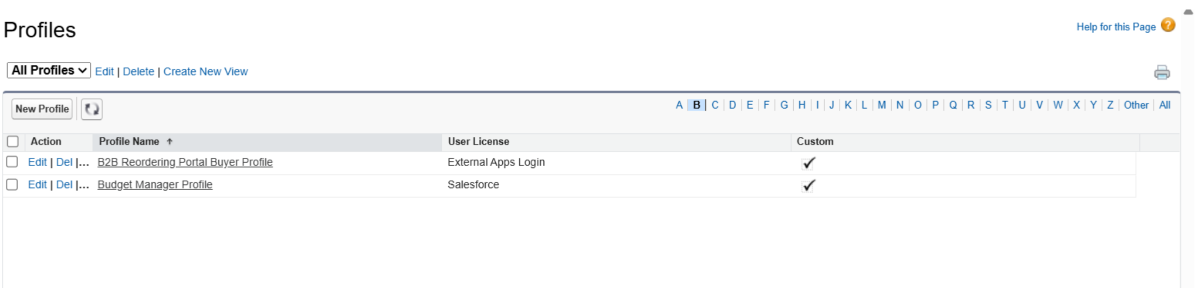


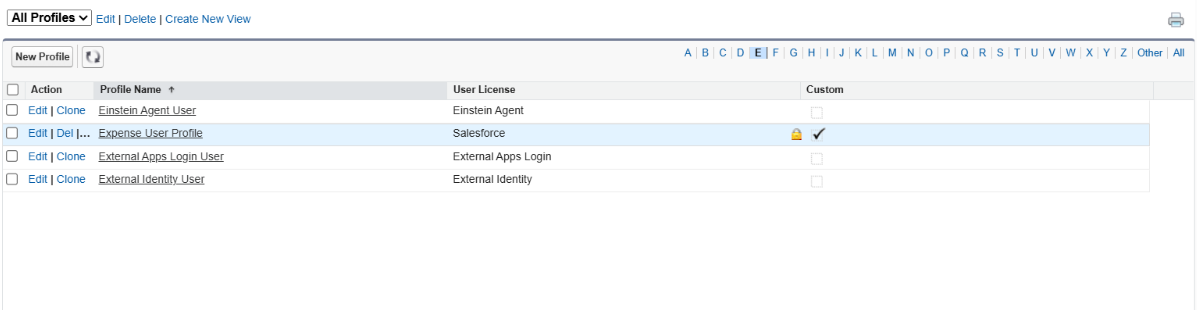
4. Profiles

Creating of Profiles for the Users: Setup → Profiles → Clone Standard User Profile

Created Profiles:

- **Budget Manager Profile** → Full access to Budgets and Expenses.
- **Expense User Profile** → Create and view Expenses, Read-only on Budgets.



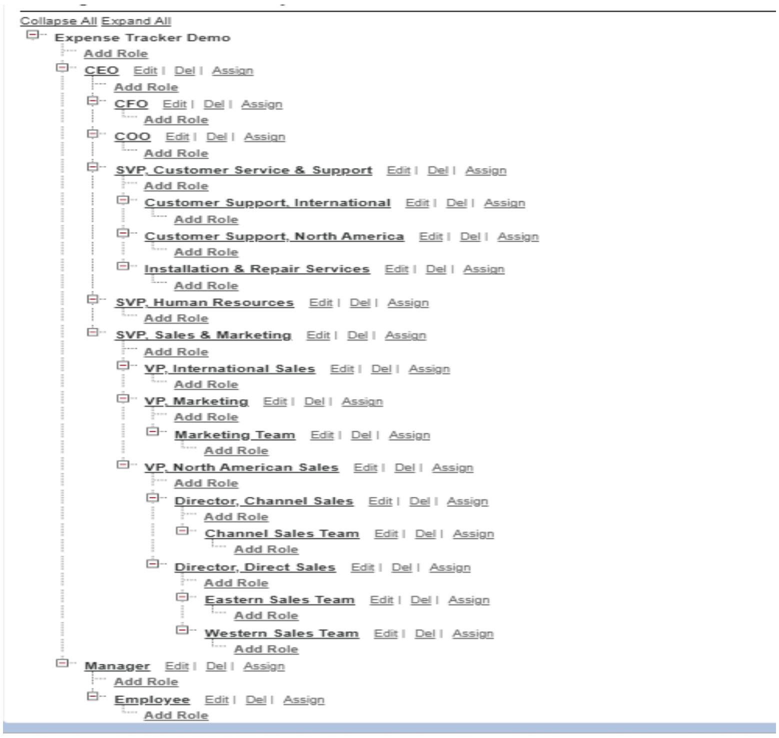


5. Roles: I have created Roles for the users Manager and the User.

Setup → **Roles → New Role**

- Manager (Budget Manager)
- Employee (Expense User)

Allows data visibility to flow upwards (Managers see Employee records).



6. Permission Sets

Setup → **Permission Sets → New Permission Set**

- Create *Expense Reporter* permission set.
- Assign additional access like Reports & Dashboards.
- Permission Sets provides flexibility without modifying profiles.

7. Organization-Wide Defaults (OWD): I have created OWD as follows:

Setup → **Sharing Settings → Organization-Wide Defaults**.

- **Budget Object:** Private (only owner and above can see).
- **Expense Object:** Controlled by Parent (inherits Budget visibility).

It Ensures data security and privacy.

8. Sharing Rules: To setup Sharing rules, go to Setup -> **Sharing Rules -> New Rule**

- Create a rule that allows Managers to view all Budgets owned by Employees.
- Expands access where collaboration is needed.

9. Login Access Policies

Setup → **Login Access Policies**.

- Enable Admin login as any user (for testing).
- Optionally restrict Expense User login hours (e.g., 9 AM – 6 PM).

Adds both flexibility (testing) and security (restricted access).

10. **Developer Org Setup**

- **Action:** Configure Developer Org as the central workspace.
    - Install useful tools (optional): Salesforce Inspector Chrome extension.
    - Login into the developer org where it helps do all tasks that are required during the project implementation.
- **Purpose:** Provides a safe environment to experiment, test, and validate configurations.