

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.

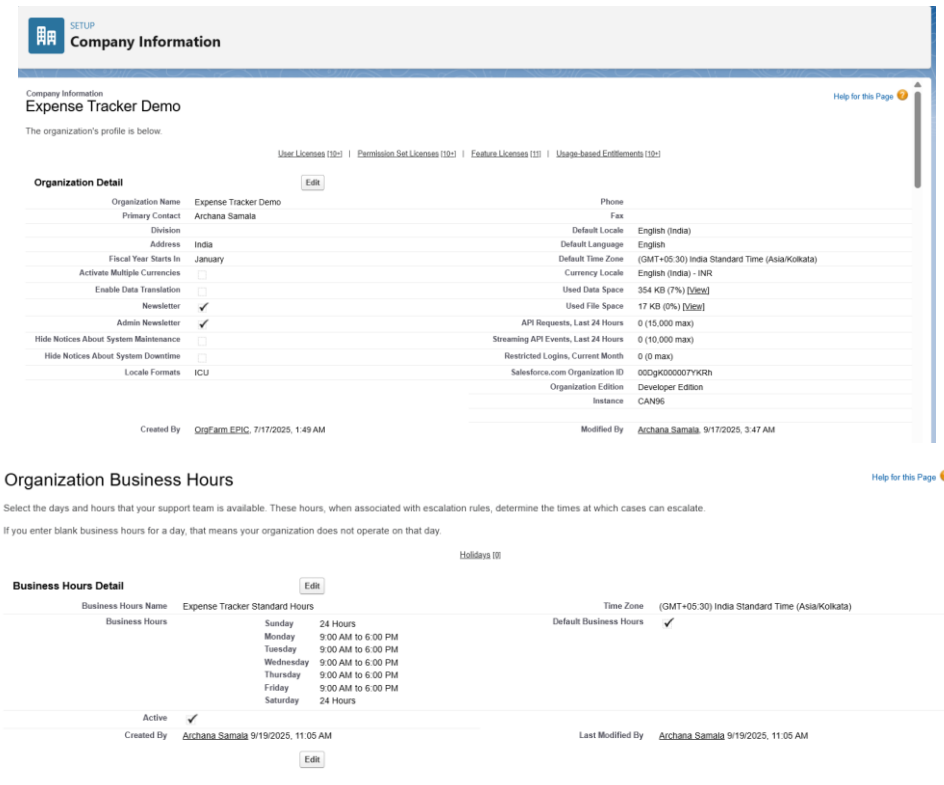
PHASE -2 Org Setup & Configuration

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.



The screenshot shows the 'Company Information' setup page in Salesforce. The organization name is 'Expense Tracker Demo'. The primary contact is 'Archana Samala'. The address is 'India'. The fiscal year starts in 'January'. The default time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The currency locale is 'English (India) - INR'. The page also shows various system settings like 'Enable Data Translation', 'Newsletter', 'Admin Newsletter', 'Hide Notices About System Maintenance', 'Hide Notices About System Downtime', and 'Locale Formats'. The 'Organization Business Hours' section is also visible, showing the business hours for 'Expense Tracker Standard Hours'.

Company Information

Expense Tracker Demo

The organization's profile is below:

User Licenses (100) | Permission Set Licenses (100) | Feature Licenses (10) | Usage-based Entitlements (100)

Organization Detail

Organization Name	Expense Tracker Demo	Phone	
Primary Contact	Archana Samala	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	354 KB (7%) [Info]
Newsletter	<input type="checkbox"/>	Used File Space	17 KB (0%) [Info]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00c9g000007YK6Rh
		Organization Edition	Developer Edition
		Instance	CAN06

Created By: OrgTeam.EPIC 7/17/2025, 1:49 AM

Modified By: Archana Samala 9/17/2025, 3:47 AM

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays (0)

Business Hours Detail

Business Hours Name	Expense Tracker Standard Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours		Default Business Hours	<input checked="" type="checkbox"/>
	Sunday	24 Hours	
	Monday	9:00 AM to 6:00 PM	
	Tuesday	9:00 AM to 6:00 PM	
	Wednesday	9:00 AM to 6:00 PM	
	Thursday	9:00 AM to 6:00 PM	
	Friday	9:00 AM to 6:00 PM	
	Saturday	24 Hours	
Active	<input checked="" type="checkbox"/>		
Created By	Archana Samala 9/19/2025, 11:05 AM	Last Modified By	Archana Samala 9/19/2025, 11:05 AM

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.

User **Budget Manager** [User Profile Help for this Page](#)

[Permission Set Assignments](#) | [Activation Required](#) | [Permission Set Group Assignments](#) | [Permission Set License Assignments](#) | [Personal Groups](#) | [Public Group Membership](#) | [Queue Membership](#) | [Team](#) | [Managers in the Role Hierarchy](#) | [OAuth Apps](#) | [Third-Party Account Links](#) | [Built-in Authenticators](#) | [Installed Mobile Apps](#) | [Authentication Settings for External Systems](#) | [Login History](#) | [User Provisioning Accounts](#)

User Detail [Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	Budget Manager	Role	Salesforce
Alias	bmgr	User License	System Administrator
Email	archanasamata2005@gmail.com Verify	Profile	Active
Username	budget.manager.archana@expensetracker.dev	My Settings	User: Budget Manager - Salesforce - Developer Edition
Nickname	BudgetMgr	Knowledge User	<input type="checkbox"/>
Title		Flow User	<input type="checkbox"/>
Company		Service Cloud User	<input type="checkbox"/>
Department		Site.com Contributor User	<input type="checkbox"/>
Division		Site.com Publisher User	<input type="checkbox"/>
Address		WDC User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Mobile Push Registrations	View
Locale	English (India)	Data.com User Type	Edit
Language	English	Accessibility Mode (Classic Only)	Edit
Delegated Approver		Debug Mode	Edit
Manager		High Contrast Palette on Charts	Edit
Receive Approval Request Emails	Only if I am an approver		
Federation ID			

User **Expense User** [User Profile Help for this Page](#)

[Permission Set Assignments](#) | [Activation Required](#) | [Permission Set Group Assignments](#) | [Permission Set License Assignments](#) | [Personal Groups](#) | [Public Group Membership](#) | [Queue Membership](#) | [Team](#) | [Managers in the Role Hierarchy](#) | [OAuth Apps](#) | [Third-Party Account Links](#) | [Built-in Authenticators](#) | [Installed Mobile Apps](#) | [Authentication Settings for External Systems](#) | [Login History](#) | [User Provisioning Accounts](#)

User Detail [Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	Expense User	Role	Salesforce
Alias	exuser	User License	System Administrator
Email	archanasamata2005@gmail.com Verify	Profile	Active
Username	expense.user.archana@expensetracker.dev	My Settings	User: Expense User - Salesforce - Developer Edition
Nickname	ExpUser	Knowledge User	<input type="checkbox"/>
Title		Flow User	<input type="checkbox"/>
Company		Service Cloud User	<input type="checkbox"/>
Department		Site.com Contributor User	<input type="checkbox"/>
Division		Site.com Publisher User	<input type="checkbox"/>
Address		WDC User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Mobile Push Registrations	View
Locale	English (India)	Data.com User Type	Edit
Language	English	Accessibility Mode (Classic Only)	Edit
Delegated Approver		Debug Mode	Edit
Manager		High Contrast Palette on Charts	Edit
Receive Approval Request Emails	Only if I am an approver		
Federation ID			

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.

Profiles [Help for this Page](#)

[All Profiles](#) [Edit](#) [Delete](#) [Create New View](#)

[New Profile](#) [Add](#)

Action	Profile Name	User License	Custom
Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
Edit Del ...	Budget Manager Profile	Salesforce	<input checked="" type="checkbox"/>

[All Profiles](#) [Edit](#) [Delete](#) [Create New View](#)

[New Profile](#) [Add](#)

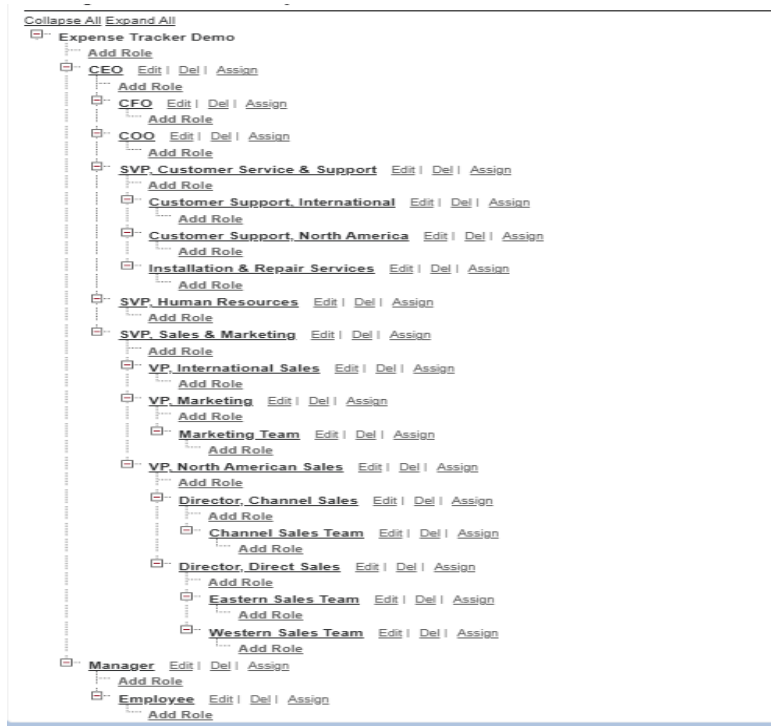
Action	Profile Name	User License	Custom
Edit Clone	Einstein Agent User	Einstein Agent	<input type="checkbox"/>
Edit Del ...	Expense User Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	External Apps Login User	External Apps Login	<input type="checkbox"/>
Edit Clone	External Identity User	External Identity	<input type="checkbox"/>

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.

