

Expense Tracker – Full Documentation

1 Problem Understanding & Analysis

Problem: Employees need a way to submit expenses, and the company wants to track them easily.

Requirements:

- Track Expense Name, Amount, Date, Category, Status.
 - Flag high expenses (>500) for review automatically.
 - Simple UI for creating/viewing expenses.
 - Basic reporting to see total expenses by category.
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2 Org Setup & Configuration

1. Use a **Salesforce Developer Org**.

The screenshot shows the Salesforce interface for the 'Expenses' object. At the top, there's a header with a coffee cup icon and the title 'Expense Tracker'. Below it, a toolbar with buttons for 'New', 'Import', 'Change Owner', 'Printable View', and 'Assign Label'. A search bar says 'Search this list...' with a magnifying glass icon. To the right of the search bar are three small icons: a gear, a refresh, and a pencil. The main area displays a table with three rows of expense data. Each row has a checkbox in the first column and a link in the second column. The table has scroll bars on the right and bottom.

	Expense Name ↑
1	Cafe Date
2	Flight to Delhi
3	Lunch

2. All configurations will be done in the default org.
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3 Data Modeling & Relationships

Step 1: Create Custom Object – Expense

1. Setup → **Object Manager** → **Create** → **Custom Object**
2. Details:
 - **Label:** Expense
 - **Plural Label:** Expenses

- **Record Name:** Expense Name (Text)
- Check **Allow Reports, Allow Activities**

3. Save

Step 2: Add Custom Fields

- Setup → Object Manager → Expense → **Fields & Relationships** → New

Field Label Data Type Notes

Amount Currency 16,2

Date Date

Category Picklist Travel, Food, Office, Other

Status Picklist Submitted, Approved, Rejected, Need Approval

- Save each field.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING
Amount	Amount_c	Currency(16, 2)	
Category	Category_c	Picklist	
Created By	CreatedBy	Lookup(User)	
Date	Date_c	Date	
Expense Name	Name	Text(80)	
Last Modified By	LastModifiedBy	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Status	Status_c	Picklist	

Step 3: Create a Tab for Expense

1. Setup → **Tabs** → New → **Custom Object Tab**
2. Object: Expense
3. Choose a tab style

4. Save → This creates **Expenses tab** in App Launcher
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Process Automation – Record-Triggered Flow

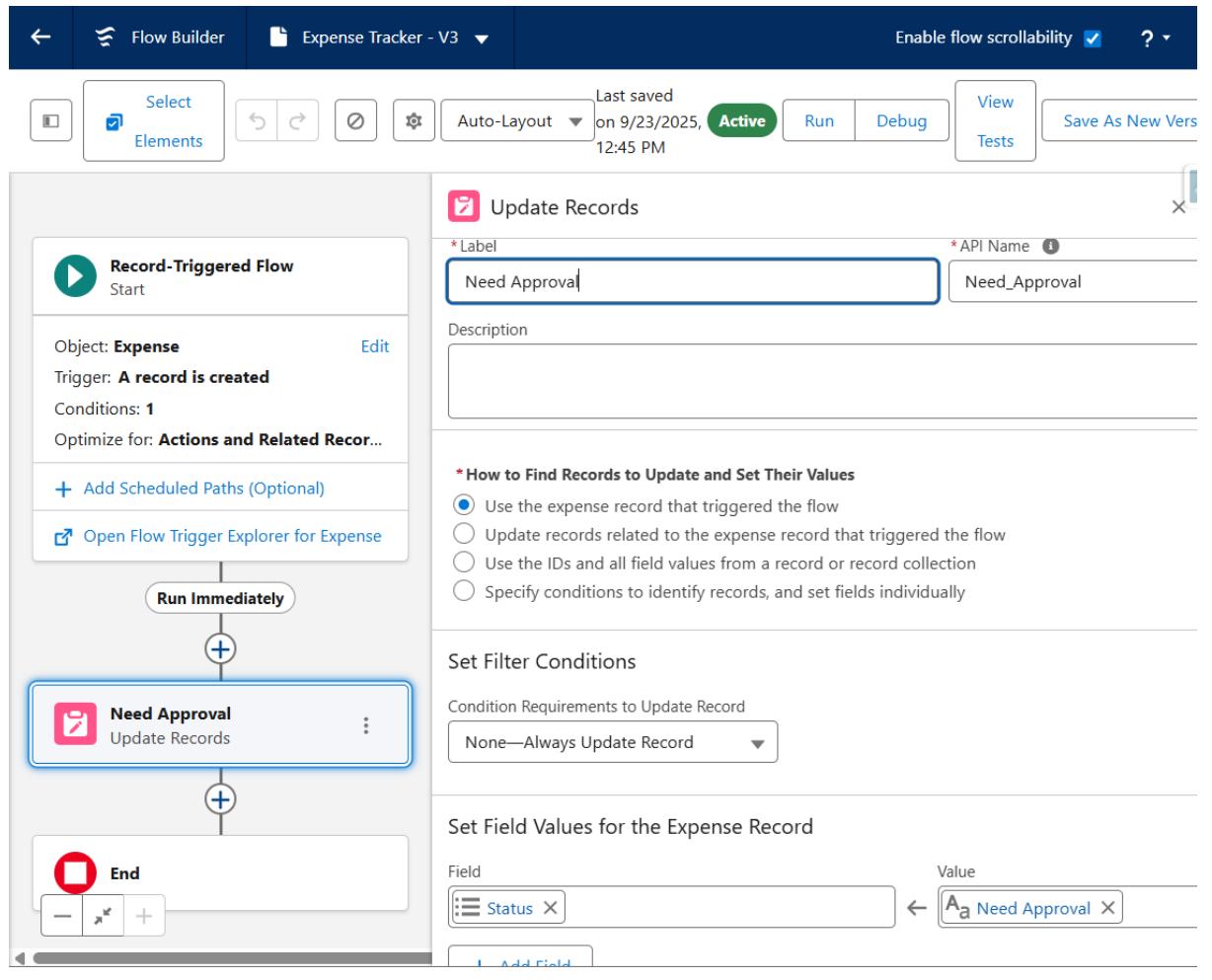
Goal: Automatically set Status = Need Approval for high expenses (>500).

Step 1: Create Flow

1. Setup → **Process Automation** → **Flows** → **New Flow** → **Record-Triggered Flow**
2. Object: **Expense**
3. Trigger: **A record is created**
4. Condition: **Amount__c > 500**
5. Optimize for: **Actions and Related Records**
6. Run the Flow: **After the record is saved**

Step 2: Update Records

1. Click + → **Update Records**
2. Label: Update Status to Need Approval
3. Which records to update → **The record that triggered the flow**
4. Set Field Values → **Status__c = Need Approval**
5. Connect Start → Update → End
6. Save & Activate



User Interface Development – Lightning App Page

Step 1: Create App Page

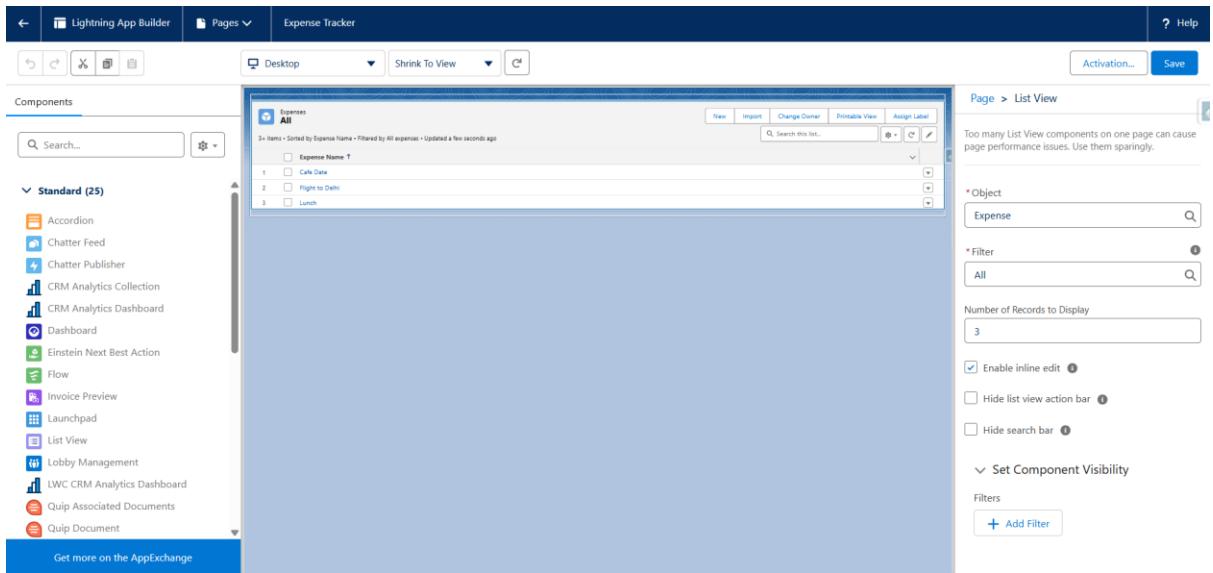
1. Setup → App Builder → New → App Page
2. Name: Expense Tracker
3. Layout: One Region → Finish

Step 2: Add Components

1. Drag List View → Object: Expense → Default List View
 - Allows viewing records and creating new ones

Step 3: Save & Activate

- Save → Activate → Set as Org Default



7 Data Management

1. Go to Expenses Tab → New
2. Create sample expenses:

Expense Name Amount Date Category Status

Flight to Delhi	600	Today	Travel	Submitted (Flow updates to Need Approval)
Lunch	150	Today	Food	Submitted
Office Supplies	300	Today	Office	Submitted

8 Reports & Dashboards

Step 1: Create Report

1. Setup → Reports → New Report → Expense
2. Group by: Category
3. Summarize: Amount (Sum)
4. Save → Expense Report

Step 2: Create Dashboard

1. Setup → Dashboards → New Dashboard
2. Name: Expense Dashboard
3. Add Component:
 - o Chart → Source: Expense Report → Chart Type: Pie → Group by: Category

4. Save & View

The screenshot shows a Salesforce Lightning App Page titled "Expense Report". At the top, there is a header with a green icon, the title "Report: Expenses Expense Report", and several buttons: "Enable Field Editing", "Search", "Add Chart", "Edit", and a dropdown menu. Below the header, the page displays summary statistics: "Total Records 4" and "Total Amount ₹2,450.00". A table follows, showing expense details categorized by type:

Category	Amount
Travel (1)	₹600.00
Subtotal	₹600.00
Food (1)	₹150.00
Subtotal	₹150.00
Other (2)	₹700.00
	₹1,000.00
Subtotal	₹1,700.00
Total (4)	₹2,450.00

At the bottom of the page, there are four toggle switches labeled "Row Counts", "Detail Rows", "Subtotals", and "Grand Total".

9 Testing Steps

1. Go to Expenses Tab → New
2. Create a record with Amount > 500 → Status should automatically be Need Approval
3. Test Apex helper in Developer Console
4. Check Report & Dashboard → Expense totals by Category

Summary of Features

- Custom Object: Expense
- Fields: Amount, Date, Category, Status
- Flow automation: Flag high expenses
- Apex helper: Small logic for messages
- Lightning App Page: List View + optional chart
- Reports & Dashboard: Expense summary by category

