Expense Tracker – Full Documentation

1️⃣ Problem Understanding & Analysis

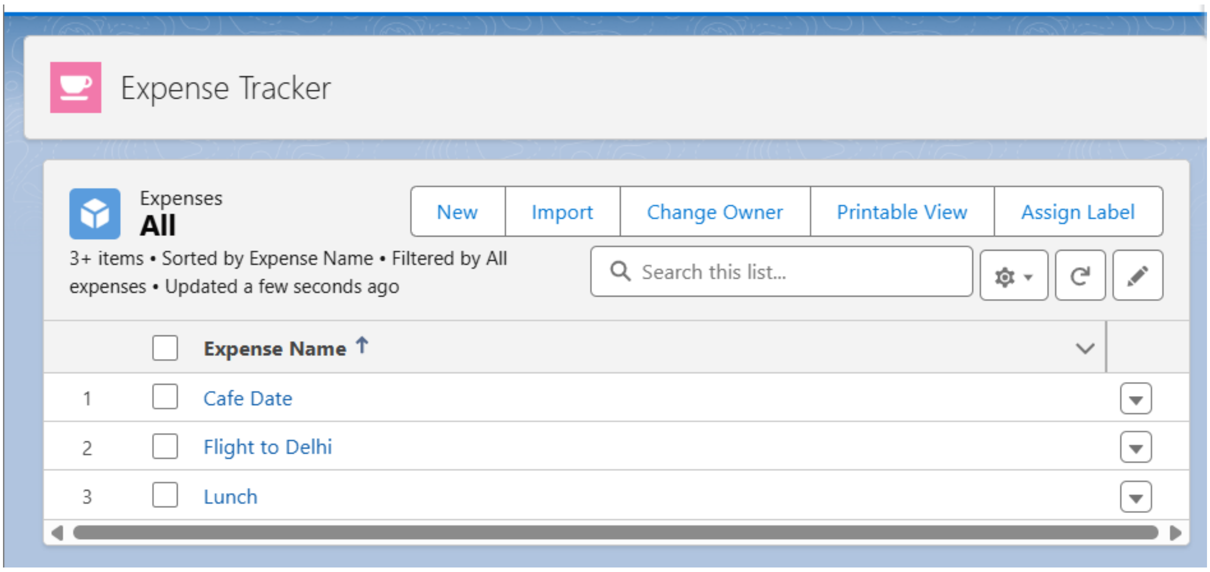
Problem: Employees need a way to submit expenses, and the company wants to track them easily.

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.

2️⃣ Org Setup & Configuration

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



2. All configurations will be done in the default org.

3️⃣ 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**

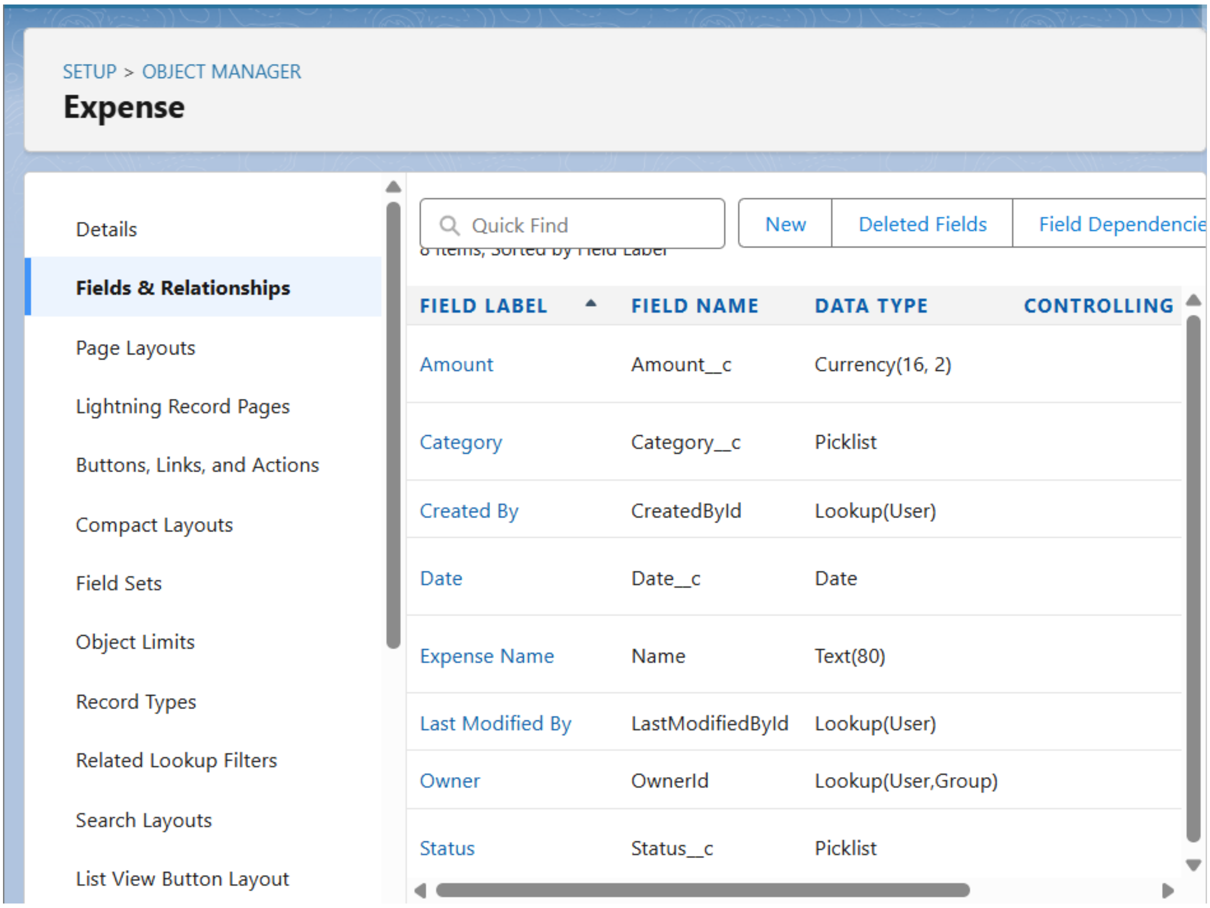
3. Save

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.



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

4️⃣ Process Automation – Record-Triggered Flow

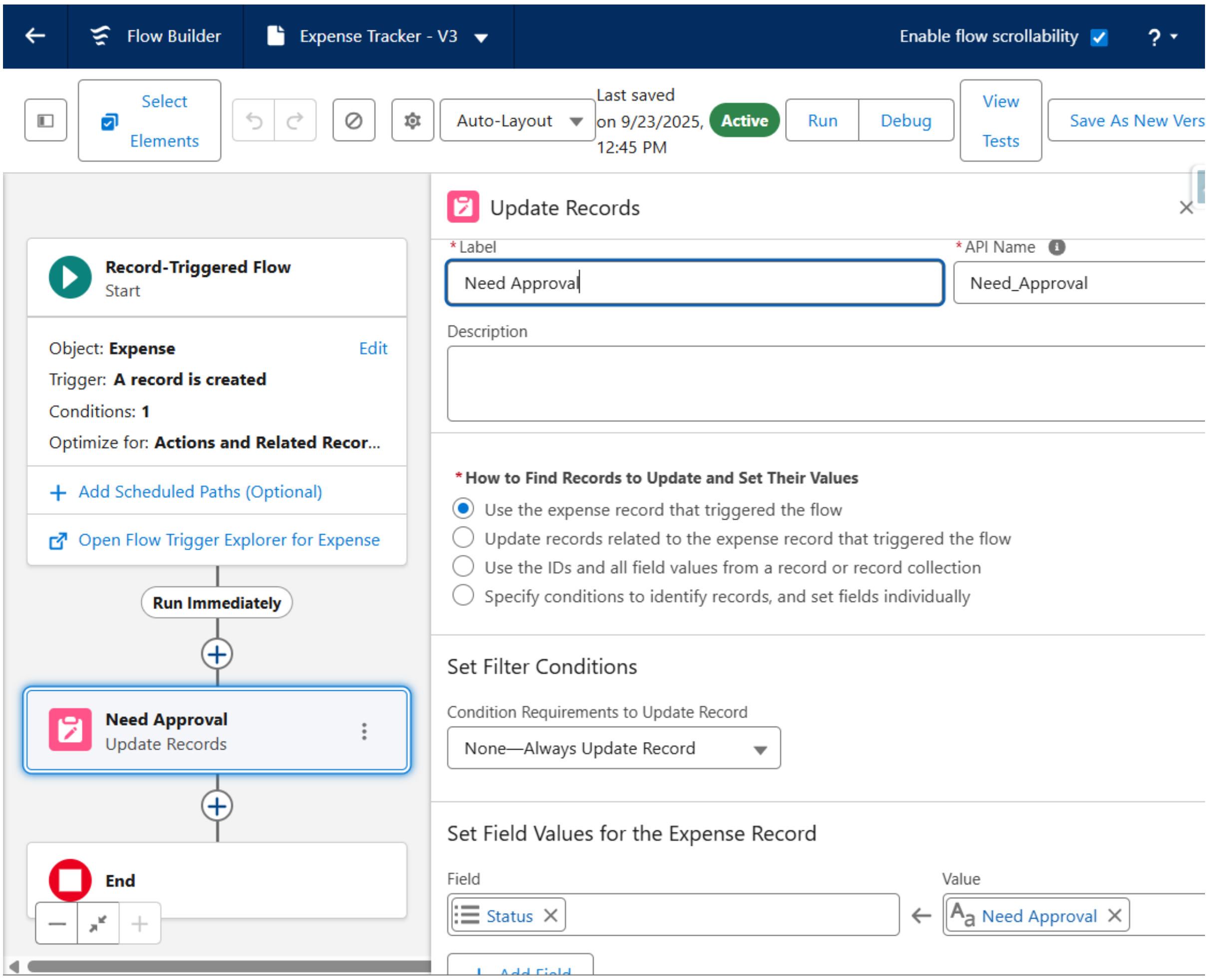
Goal: Automatically set Status = Need Approval for high expenses (>500).

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

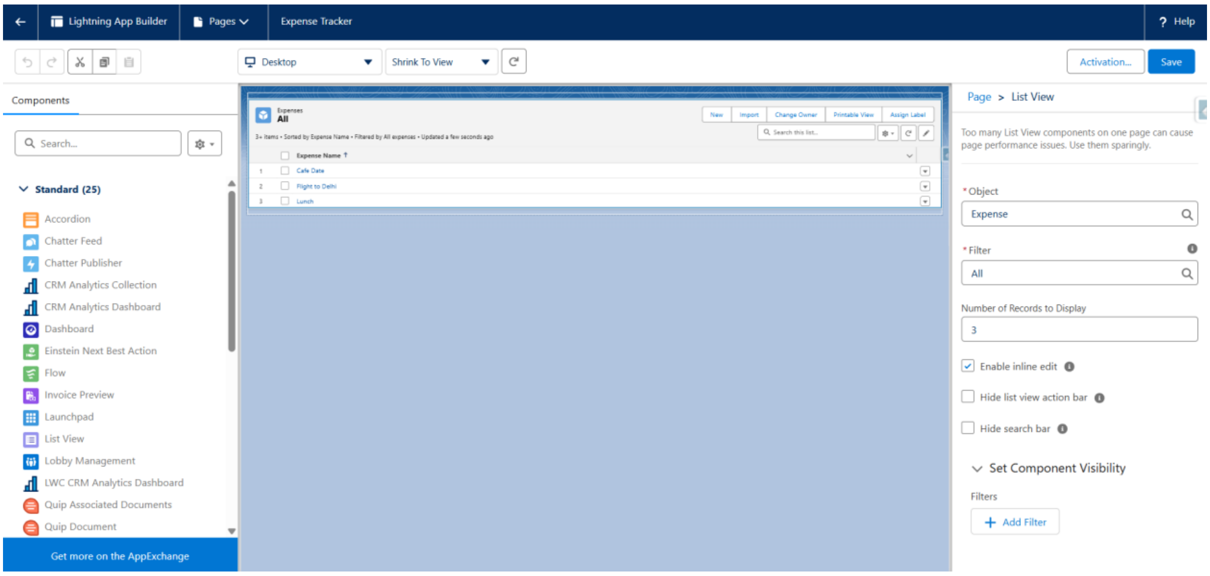
1. Setup → **App Builder** → **New** → **App Page**
2. Name: Expense Tracker
3. Layout: One Region → Finish

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



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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

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8 Reports & Dashboards

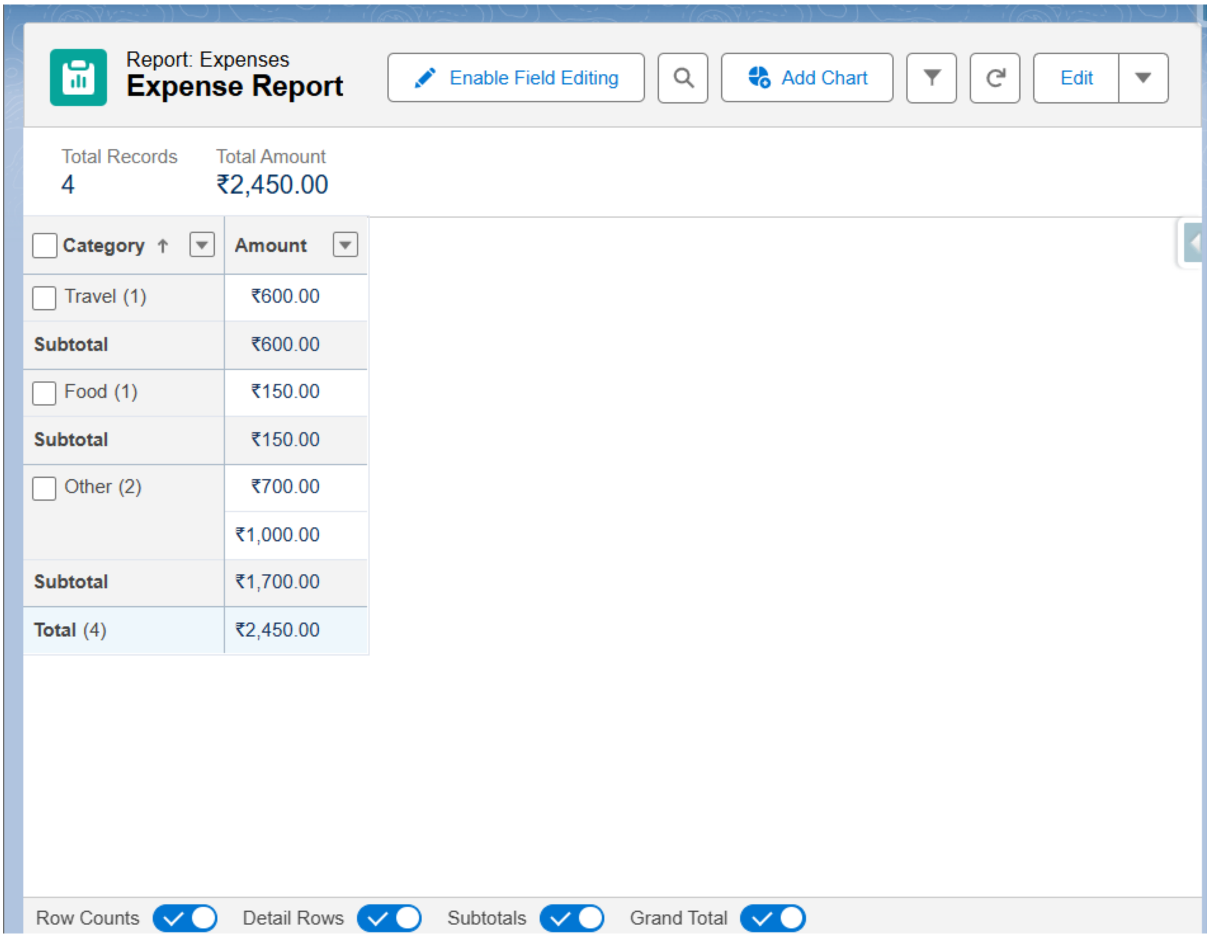
Step 1: Create Report

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:
   - Chart → Source: Expense Report → Chart Type: Pie → Group by: Category

4. Save & View



9️⃣ 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