Expense Tracker Salesforce Project:

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

- Talk to employees, managers, finance teams, and leadership to understand problems in the current expense process.
- Identify needs like:
  - Easy expense submission with receipt upload
  - Quick approvals
  - Notifications and reminders
  - Reports and dashboards
  - Integration with accounting systems.
- Note compliance rules like tax policies and audit trails.

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2. Stakeholder Analysis

Find out who is involved and what they expect:

Stakeholder	Expectation
Employees	Simple way to submit expenses
Managers	Easy approval process
Finance Team	Accurate data and reports
Admins/Salesforce Team	Easy to configure and manage
Leadership	Clear spending insights

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3. Business Process Mapping

Understand how the current process works and plan the new one.

Current Process (As-Is):
Manual – Employees email receipts → Manager checks → Finance team processes → Records updated manually.

Proposed Process (To-Be):
Salesforce automated flow – Employee submits expense → Automatic notification to manager → Approval → Finance notified → Records updated → Dashboard tracking.

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4. Industry-Specific Use Case Analysis

Identify use cases based on business needs:

- **Employee:** Submit expense with receipt from mobile.
- **Manager:** Approve or reject multiple requests easily.
- **Finance Team:** Generate reports and ensure compliance.
- **Leadership:** Track spending trends.

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5. AppExchange Exploration

- Check Salesforce **AppExchange** for ready-made apps like *Expensify*, *Concur*, or *Certify*.
- Compare features, costs, and decide:
  - **Buy**: Use an existing app.
  - **Build**: Create a custom expense tracker in Salesforce.
