**Salesforce Expense Request Approval Process Setup Document**

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**Project Title:** Salesforce Expense Request Approval Process Setup

**Date**: September 16, 2025

**1. Salesforce Org Setup**

* **Create or access Salesforce Org:** Sign up for a Salesforce Developer Edition or log into your company sandbox or production org.
* **Verify Permission Sets and Profiles:** Ensure your user has “System Administrator” or appropriate permissions to create objects, fields, and automation.
* **Enable Lightning Experience (optional):** For modern UI and improved user experience.

**2. Create Custom Objects**

**Expense Report Object**

* Setup → Object Manager → Create → Custom Object
* Label: Expense Report
* Plural Label: Expense Reports
* Object Name: Expense\_Report\_\_c
* Record Name: Auto Number (Format: ER-{00000})
* Optional: Enable Reports, Activities, Allow Lightning Experience

**Expense Item Object**

* Setup → Object Manager → Create → Custom Object
* Label: Expense Item
* Plural Label: Expense Items
* Object Name: Expense\_Item\_\_c
* Record Name: Auto Number (Format: EI-{00000})
* Enable Master-Detail Relationship (Expense Report as parent)

**3. Create Custom Fields on Expense Report**

* **Submitter**
  + Type: Lookup (User)
  + Purpose: To identify the user submitting the expense report.
* **Status**
  + Type: Picklist
  + Values: Draft, Submitted, Approved, Rejected, Returned
* **Total Amount**
  + Type: Currency
  + Purpose: Roll-up summary field to sum related Expense Item amounts.
* **Start Date / End Date**
  + Type: Date
  + Purpose: Duration of the expenses.
* **Submitted Date**
  + Type: Date/Time
  + Purpose: When report was submitted for approval.
* **Description / Notes**
  + Type: Long Text Area
  + Purpose: Additional details about the report.
* **Approved By**
  + Type: Lookup (User)
  + Purpose: Records the final approver.

**4. Create Custom Fields on Expense Item**

* **Type**
  + Type: Picklist
  + Values: Travel, Lodging, Meals, Other
* **Amount**
  + Type: Currency
* **Expense Date**
  + Type: Date
* **Description**
  + Type: Text Area (Long)
* **Expense Report**
  + Type: Master-Detail (Expense Report)

**5. Create Roll-Up Summary on Expense Report**

* Field: Total Amount
* Summarized Object: Expense Item
* Roll-Up Type: SUM of Amount field

**6. Create Tabs for Objects**

* Setup → Tabs → Custom Object Tabs → New
* Create tab for Expense Report
* Create tab for Expense Item
* Assign tab style and make tabs visible to profiles as needed

**7. (Optional) Next Steps After This Setup**

* Configure Approval Processes to automate approval routing.
* Create Validation Rules to ensure data integrity.
* Customize Page Layouts and Lightning Pages for better UX.
* Assign Permissions and Sharing Settings.
* Build Reports and Dashboards to monitor expense activities.