Expense Tracker CRM

Phase 1: Problem Understanding & Industry Analysis

Requirement Gathering

- Expense logging with category, amount, and payment method.
- Budget tracking and alerts for overspending.
- Approval workflows for manager/team expenses.
- Real-time dashboards and reports for insights.
- Multi-user access for personal and team tracking.

Stakeholder Analysis

- **Employees/Users:** Log expenses, track budgets.
- **Managers:** Approve/reject expenses, monitor team spending.
- **Finance Teams:** Analyze expenses, generate reports.
- **Salesforce Admins:** Customize objects, workflows, dashboards.

Business Process Mapping

- Expense Added → Category Assigned → Budget Validation → Alert/Notification → Manager Approval → Dashboard Updated → Reports Generated

Industry Use Case Analysis

- Manual spreadsheets or third-party apps lack integration and automation.
- Competitors like Concur or Abacus are costly and not fully Salesforce-native.
- Salesforce-native solution provides integrated expense tracking, approvals, and reporting.

AppExchange Exploration

- Existing apps: Concur, Expense Manager, Abacus.
- Limitations: Expensive, limited customization, no native Salesforce automation.
- Opportunity: Lightweight Salesforce-native Expense Tracker with approvals, alerts, and dashboards.

AppExchange Exploration

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