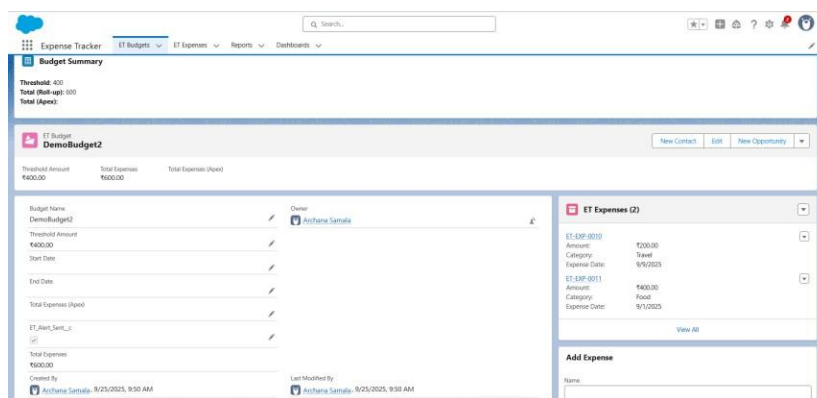


User Interface Development

The main objective of this phase was to build an intuitive, user-friendly interface for the **Expense Tracker** application using **Salesforce Lightning components**. The focus was on improving navigation, record visibility, and interactivity.

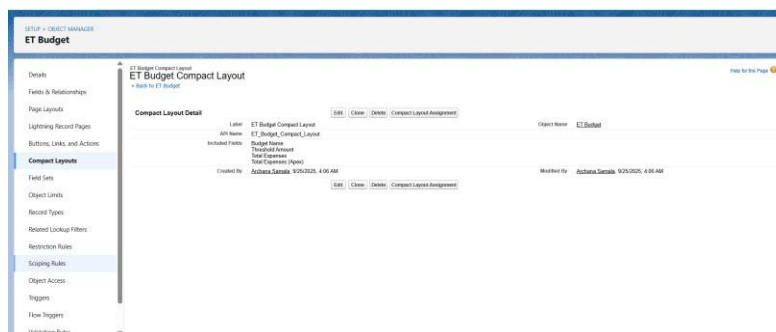
1. Lightning App Builder and Tabs

- Created a new **Lightning App** named **Expense Tracker** using the App Manager.
- Selected the **standard navigation style** and added tabs for **ET Budget** and **ET Expense**.
- Assigned the app to relevant profiles: **System Administrator**, **ET_Manager_Profile**, and **ET_Employee_Profile**.



2. Lightning Record Pages

- Template used:** Header and Tabs.
- Highlights Panel:** Showed key fields such as Threshold_Amount__c, Total_Expenses__c, Total_Expenses_Apex__c, Amount__c, Expense_Date__c, and Category__c.
- Details Tab:** Displayed all record details.
- Related Tab:** Showed related expense records.
- Created and assigned a **Compact Layout** so that the Highlights Panel clearly displays key budget information.



3. Lightning Web Components (LWCs)

Three custom LWCs were developed to enhance interactivity:

1. **budgetSummary**

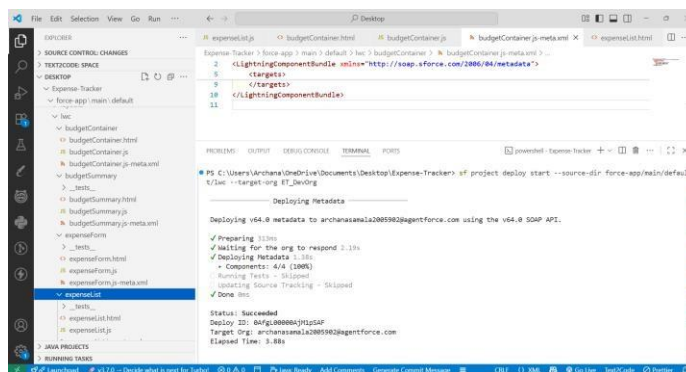
- Displays the budget's threshold and total expenses.
- Key fields are shown in a **Lightning Card** for quick visibility.

2. **expenseList**

- Displays all expenses associated with a budget.
- Utilizes the **getRelatedListRecords** wire adapter.
- Shows a table with **Date, Category, Amount, and Name** of each expense.

3. **expenseForm**

- Allows users to add new expenses under a budget.
- Dispatches an event after record creation to refresh the expense list.
- Includes input fields for **Name, Amount, Date, and Category**.



4. Deploying LWCs

- All components were saved under force-app/main/default/lwc in **VS Code**.
- Deployed to the Salesforce org using CLI:

`sf project deploy start --source-dir force-app/main/default/lwc --target-org ET_DevOrg`

- Added components to the **ET Budget Record Page** via App Builder:
 - budgetSummary in the header or right panel.
 - expenseList in the Related tab or main area.
 - expenseForm in a sidebar or utility region.
- Tested each component to ensure correct data display and functional expense creation.

Expense Tracker

ET BudgetsET ExpensesReportsDashboards

Search

Budget Summary

Threshold: 400
Total (Budget): 000
Total (Spent):

ET Budget

DemoBudget2

New ContactAddNew Opportunity

Threshold Amount: 400.00

Total Expenses: 700.00

Total Expenses (Spent):

Budget Name: DemoBudget2

Threshold Amount: 400.00

Start Date:

End Date:

Total Expenses (Spent):

ET_Amt_Spent_1:

Total Expenses: 700.00

Created By: Arthura Sample 8/15/2025, 9:50 AM

Last Modified By: Arthura Sample 8/15/2025, 9:50 AM

Owner: Arthura Sample

ET Expenses (2)

ET-EXP-0019
Amount: 500.00
Category: Travel
Expense Date: 8/10/2025

ET-EXP-0011
Amount: 200.00
Category: Food
Expense Date: 8/10/2025

Show All

Add Expense

Name: