**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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