**1.Project Title : Smart Expense Tracker**

**2.Problem Statement :**

In most organizations, expense management is still carried out manually. Employees are required to enter expense details into spreadsheets or internal systems, which is time-consuming and error-prone. Lack of automation leads to delays in reimbursements, difficulty in auditing, and poor visibility into overall spending patterns.

There is a need for a system that simplifies expense tracking, provides structured storage, and allows easy analysis without relying on manual processes**.**

**3.Industry Analysis :**

The expense management industry is evolving rapidly with digital transformation initiatives. Organizations worldwide are shifting from manual processes to automated systems to improve efficiency.

* Market Size: The global expense management software market is expected to grow significantly, driven by the demand for automation in finance and HR operations.
* Trends:
  + Cloud-based applications for accessibility.
  + Mobile and web apps for easy expense submission.
  + Dashboards and reporting for financial insights.
* Use Cases Across Industries:
  + IT & Consulting – Frequent travel and client billing.
  + Healthcare – Staff reimbursements and operational costs.
  + Retail & Hospitality – Vendor and supplier management.

**4.Challenges Faced :**

1. Manual entry of expenses leads to errors and inconsistencies.
2. Lack of real-time visibility into organizational spending.
3. Difficulty in categorizing and analyzing expenses.
4. Slow reimbursement process impacting employee satisfaction.
5. No centralized platform for uploading and storing receipts.

**5.Objectives :**

* To design a Salesforce application that streamlines expense entry and tracking.
* To provide a centralized platform for storing and managing expense data.
* To enable employees to upload receipts and enter details easily through a Lightning Web Component (LWC).
* To provide dashboards and reports for better financial insights.
* To minimize errors and delays in expense reporting and approvals.

**6.Key Features :**

1. Upload Receipts (LWC)
   * Employees can upload receipts (image or PDF) as supporting documents.
   * Preview before submission.
2. Manual Expense Entry (Apex + LWC)
   * Users can manually enter details like vendor, date, amount, and category.
   * Data stored in a custom Salesforce object Expense\_\_c.
3. Expense Review Form (LWC)
   * Clean interface for employees/managers to edit, validate, and approve expenses.
4. Centralized Storage (Salesforce Database)
   * All expenses stored in Expense\_\_c with fields like Vendor, Amount, Date, and Category.
   * Receipts attached to the record for reference.