

Salesforce Campaign Expense Recorder: Empowering Your Marketing Campaign Management

Welcome to Salesforce Campaign Expense Recorder!

The Salesforce Campaign Expense Recorder is your go-to solution for seamlessly tracking and managing expenses associated with marketing campaigns. Designed to enhance your campaign management experience, this innovative application provides a robust set of features to empower your teams in logging ad spends, event costs, and more. This document will guide you through the various aspects of the Campaign Expense Recorder application.

Advantages:

- Cutting-edge Technology Stack:
 - Utilizes the Lightning Experience for a modern and user-friendly interface.
 - Compatible with the Salesforce mobile app, ensuring flexibility in usage.
- Real-time Insights:
 - Gain actionable data for informed decision-making on your campaign budgets and expenses.
- Seamless Integration:
 - Native Salesforce application for effortless implementation and integration into your existing Salesforce environment.
- Customizable Configurations:
 - Tailor the Campaign Expense Recorder to align precisely with your unique campaign management needs.

Key Features:

1. Smart Campaign Budget Management

- Enhances the standard Campaign object with five crucial fields for better budget tracking:
 - Total Campaign Budget (Currency)
 - Remaining Campaign Budget (Formula - Currency)
 - Total Expense Amount (Roll-Up Summary)
 - Pending Expense Amount (Roll-Up Summary)
 - Cancelled Expense Amount (Roll-Up Summary)

2. Campaign Expense Management

- Allows users to create and manage campaign-related expenses efficiently.
- Equipped with market-standard information fields and categories for comprehensive expense tracking.
- Includes pre-built validation rules to maintain data quality.

3. Integrated Reporting

- Leverages the standard Salesforce Reports tab for quick access to detailed information on campaigns and expenses.
- Provides valuable insights through customizable reports.

Salesforce Campaign Expense Recorder Tabs Overview:

Campaigns:

- Home page of the Campaign Expense Recorder, offering quick access to essential campaign information.
- Features sections such as Total Campaign Budget, Remaining Campaign Budget, and more.

Campaign Expenses:

- Allows users to create and manage campaign-related expenses.
- Supports file uploads, approval processes, and reporting for better control and insights.

Reports:

- Leverages the standard Salesforce Reports tab to provide quick access to detailed campaign and expense information.

Get Started with Salesforce Campaign Expense Recorder!

Explore the power of efficient campaign management, accurate budget tracking, and insightful reporting with the Salesforce Campaign Expense Recorder. For any assistance or further information, refer to the provided documentation or reach out to our support team at connect@techventivesolutions.com.

Empower your marketing teams for success with Salesforce Campaign Expense Recorder!

