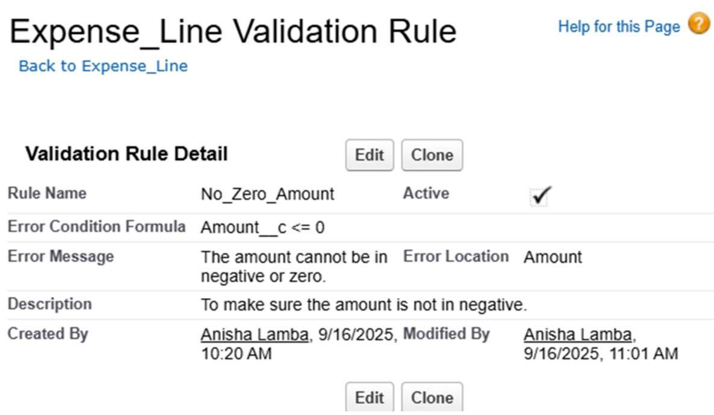
Phase 4: Process Automation (Admin)

PROJECT TITLE:-

Expense On a Page: An expense approval & insight system.
Industry: Finance / Corporate Expense Management.
Target User: Employees, Managers, and Finance Teams.

VALIDATION RULE:-

1. Making a validation rule for *Amount field* on the *Expense_Line* custom object to ensure that the amount enter is greater than zero before saving the record on the object.
    - *Rule Name:* No Zero Amount
    - *Active:* Enabled
    - *Description:* To make sure the amount is not in negative or zero.
    - *Error Condition Formula:* Amount__c <= 0
    - *Error Message:* The amount cannot be in negative or zero.
    - *Error Location:* Field (Amount)



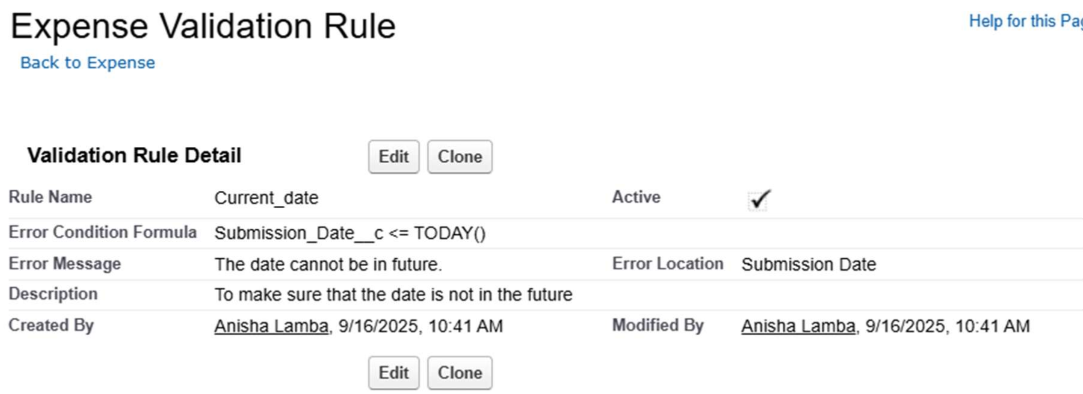
Expense_Line Validation Rule
Help for this Page
Back to Expense_Line

Validation Rule Detail — Edit | Clone

Rule Name	No_Zero_Amount	Active	✓
Error Condition Formula	Amount__c <= 0		
Error Message	The amount cannot be in negative or zero.	Error Location	Amount
Description	To make sure the amount is not in negative.		
Created By	Anisha Lamba, 9/16/2025, 10:20 AM	Modified By	Anisha Lamba, 9/16/2025, 11:01 AM

Edit | Clone

2. Making a validation rule for the *Submission Date* field on the *Expense* custom object, that validates that the submission date is not in the future and is in the present before a record is saved.
    - *Rule Name:* Current date
    - *Active:* Enabled
    - *Description:* To make sure that the date is not in the future
    - *Error Condition Formula:* Submission_Date__c > TODAY()
    - *Error Message:* The date cannot be in future.
    - *Error Location:* Field (Submission Date)



Expense Validation Rule

Back to Expense

Help for this Pag

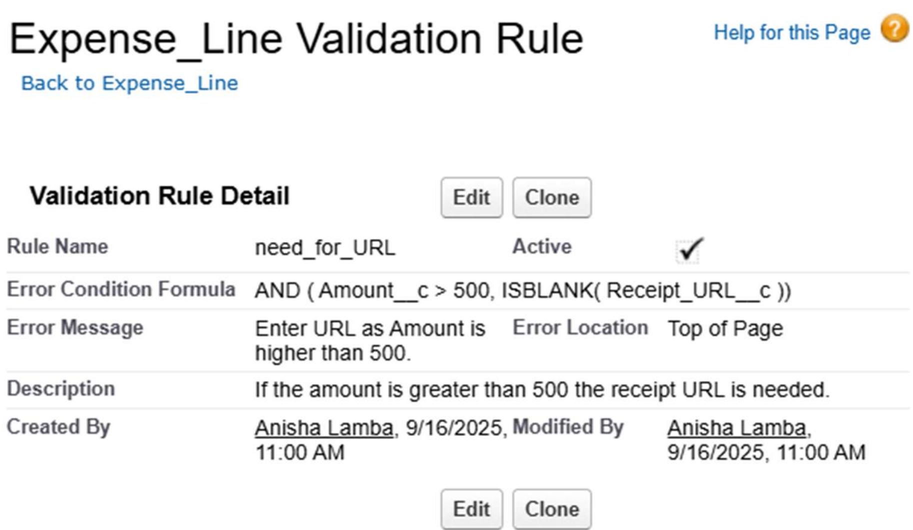
Validation Rule Detail Edit Clone

Rule Name	Current_date	Active	✓
Error Condition Formula	Submission_Date__c <= TODAY()		
Error Message	The date cannot be in future.	Error Location	Submission Date
Description	To make sure that the date is not in the future		
Created By	Anisha Lamba, 9/16/2025, 10:41 AM	Modified By	Anisha Lamba, 9/16/2025, 10:41 AM

Edit Clone

3. Making a Validation Rule for the *Expense_Line* custom object, that validates that if the *Amount* is greater than 500 then the *Receipt URL* needs to be given.

- *Rule Name:* need for URL
- *Active:* Enabled
- *Description:* If the amount is greater than 500 the receipt URL is needed.
- *Error Condition Formula:* AND (Amount__c > 500, ISBLANK(Receipt_URL__c))
- *Error Message:* Enter URL as Amount is higher than 500.
- *Error Location:* Top of Page



Expense_Line Validation Rule

Back to Expense_Line

Help for this Page

Validation Rule Detail Edit Clone

Rule Name	need_for_URL	Active	✓
Error Condition Formula	AND (Amount__c > 500, ISBLANK(Receipt_URL__c))		
Error Message	Enter URL as Amount is higher than 500.	Error Location	Top of Page
Description	If the amount is greater than 500 the receipt URL is needed.		
Created By	Anisha Lamba, 9/16/2025, 11:00 AM	Modified By	Anisha Lamba, 9/16/2025, 11:00 AM

Edit Clone

WORKFLOW RULES:-

1. Creating a Workflow Rules for *Expense* object, for when the *status of a record is Approved and the total amount is greater than 10000* there is an Email Alert sent to Finance Team.

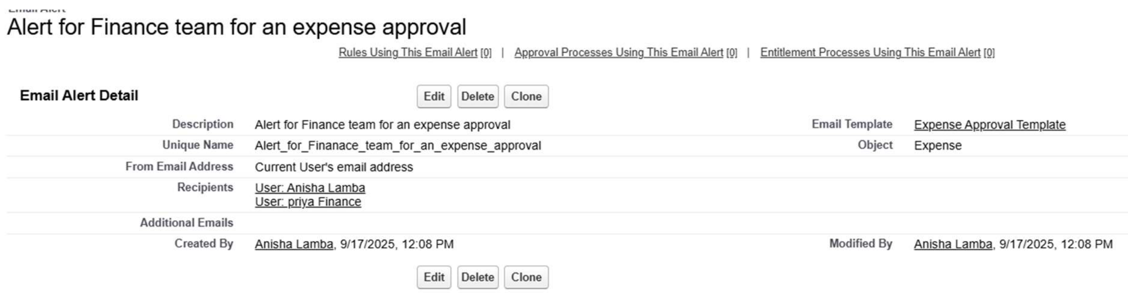
   (a) *Creating a custom Email Template-*
   Email Template Name: Expense Approval Template
   Description: This email needs to be sent to the Finance Team when the record is approved
   Related Entity Type: Expense
   Folder: Private Email Templates

   (Message Content)
   Subject: Expense Approved.
   Html Value:
   Hello Finance Team,

   Expense {{{Expense__c.Name}}} submitted
   by {{{Expense__c.Employee__c}}}
   has been approved for a total of {{{Expense__c.Total_Amount__c}}}.

   Thank You,
   Expense Management Team.

   (b) *Creating a new Email Alert-*
   Description: Alert for Finance team for an expense approval
   Unique Name: Alert_for_Finanace_team_for_an_expense_approval
   Object: Expense
   Email Template: Expense Approval Template
   Recipient Type: User



Alert for Finance team for an expense approval

Rules Using This Email Alert [0] | Approval Processes Using This Email Alert [0] | Entitlement Processes Using This Email Alert [0]

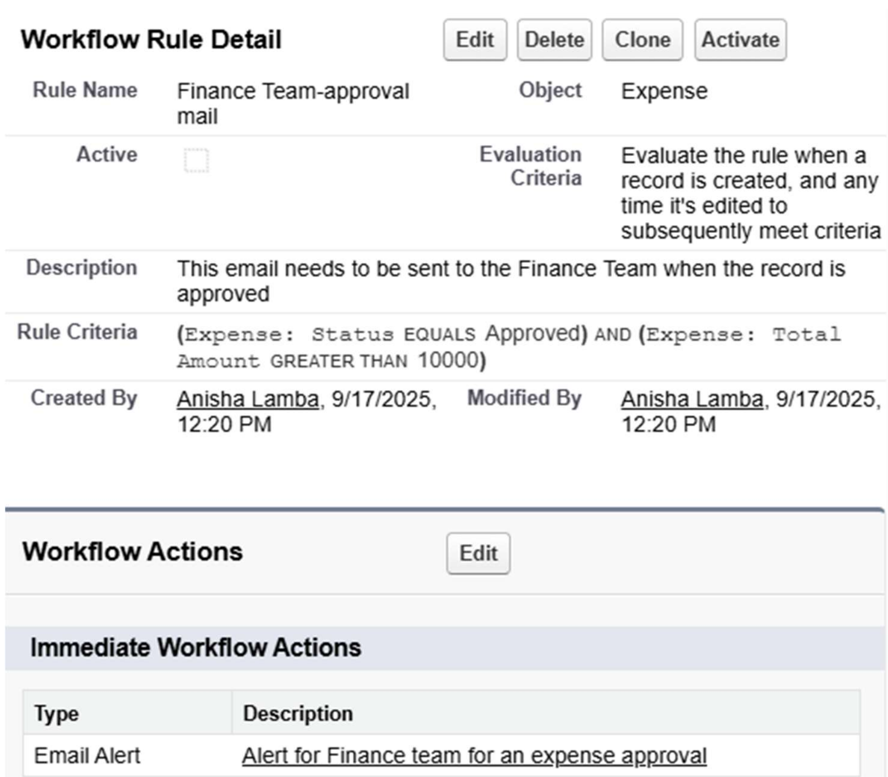
Email Alert Detail Edit Delete Clone

Description	Alert for Finance team for an expense approval	Email Template	Expense Approval Template
Unique Name	Alert_for_Finanace_team_for_an_expense_approval	Object	Expense
From Email Address	Current User's email address		
Recipients	User: Anisha Lamba User: priya Finance		
Additional Emails			
Created By	Anisha Lamba, 9/17/2025, 12:08 PM	Modified By	Anisha Lamba, 9/17/2025, 12:08 PM

Edit Delete Clone

(c) *Creating a Worklflow Rule –*
Object: Expense
Rule Name: Finance Team-approval mail
Description: This email needs to be sent to the Finance Team when the record is approved
Evaluation Criteria: Evaluate the rule when a record is: created, and any time it's edited to subsequently meet criteria.
Rule Criteria:
Expense: Status= Approved
Expense: Total Amoun> 10000

Adding the email alert, we created



Workflow Rule Detail Edit Delete Clone Activate

Rule Name	Finance Team-approval mail	Object	Expense
Active	☐	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	This email needs to be sent to the Finance Team when the record is approved		
Rule Criteria	(Expense: Status EQUALS Approved) AND (Expense: Total Amount GREATER THAN 10000)		
Created By	Anisha Lamba, 9/17/2025, 12:20 PM	Modified By	Anisha Lamba, 9/17/2025, 12:20 PM

Workflow Actions Edit

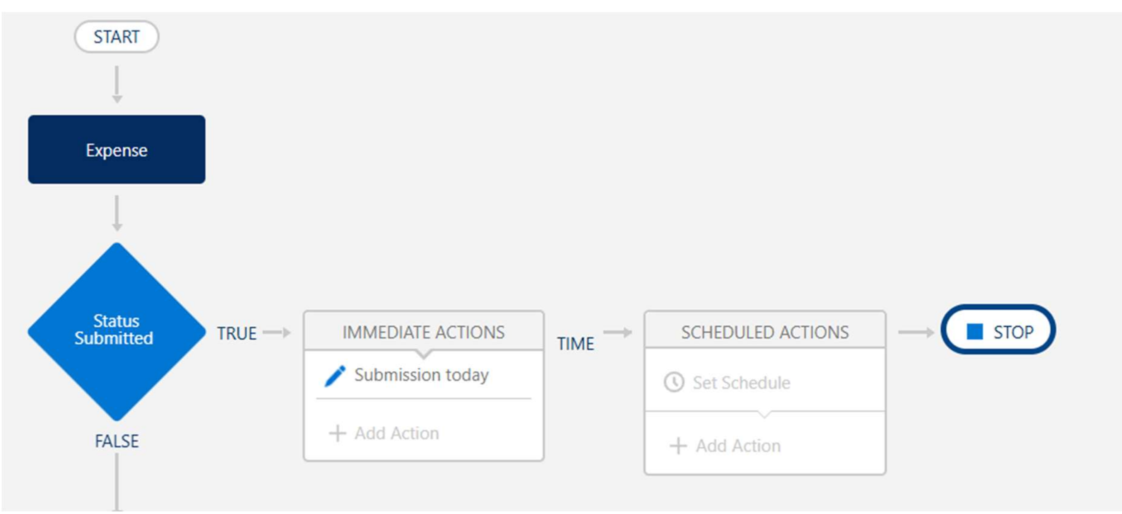
Immediate Workflow Actions

Type	Description
Email Alert	Alert for Finance team for an expense approval

PROCESS BUILDER:-

1) When the ***Status*** of an ***Expense custom object*** is ***Submitted*** then the ***Submission Date*** will be automatically updated as ***Today.*** –

Name: Status submitted submission today
API Name: Status_submitted_submission_today
(Object)
Condition: When a record is created
Object: Expense_c
(Criteria)
Criteria Name: Status Submitted
Criteria for Executing Actions: Conditions are met
Set Conditions: Field- Expense__c.Status
Operator- Equals
Type- Picklist
Value- Submitted
All of the conditions are met (AND): Enabled
Do you want to execute the actions only when specified changes are made to the record?: Yes
(Immediate Actions)
Action Type: Update Records
Action Name: Submission today
Record Type: Select the Expense__c record that started your process
New Fields Value: Field- Submission Date
Type- Formula
Value: TODAY()



APPROVAL PROCESS:-

The main goal of making the whole project is to make the approval process for expenses by employee easy and manageable so this is the most important and needed step in the project.

To enter an Expense record for approval-

- The status of the record needs to be Submitted.
- And the Total Amount needs to be above 3000 rupees.

Once it is eligible for approval, *it will go to-*

- If the Total Amount is between **3000 to 12000 it will go to Manager for approval**.
- If the Total Amount is **greater than 12000 it will go to the finance team for approval**.

The manager or the Finance Team *can take only two actions-*

- On **Approval-** Status Fields is updated to Approved.
- On **Rejection**- Status Field is updated to Rejected.

Creating the approval process:

Object: Expense

*Create New Approval Process***:** Use Standard Setup Wizard.

- *Step 1*
  Process Name: Expense approval
  Unique Name: Expense_approval
  Description: this is for manager and finance team approval of a record
- *Step 2. Specify Entry Criteria*
  i) *Field:* Expense: Status
  Operator: equals
  Value: Submitted
  ii) *Field:* Expense: Total Amount
  Operator: greater than
  Value: 3000

Adding approval steps-

- *Step 1*
  Name: Manager approval
  Unique Name: Manager_approval
  Description: This will go to manager for approval
  Criteria: Field- Expense: Total Amount
  Operator: Greater than
  Value: 3000

Approver: User: Rahul Reddy (Manager)

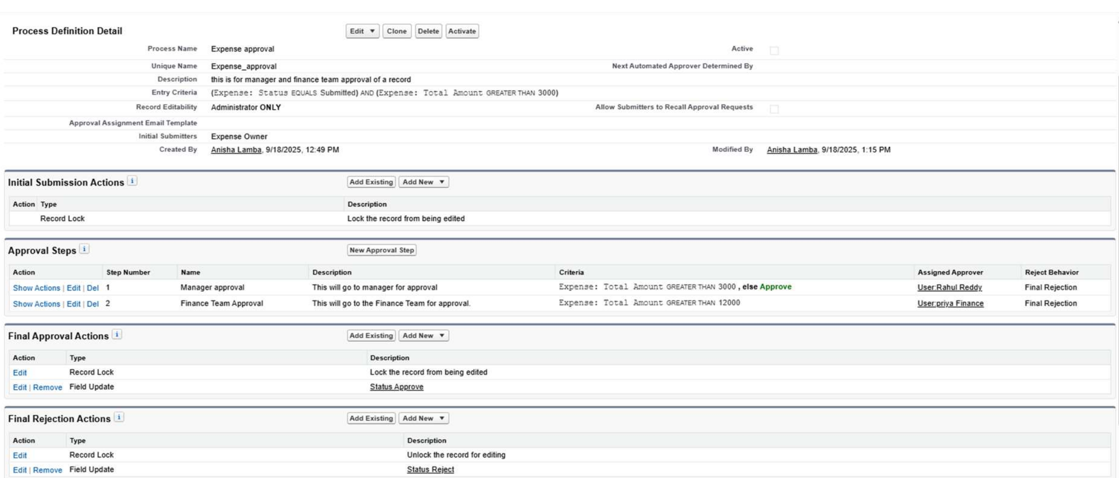
- *Step 2*
  Name: Finance Team Approval
  Unique Name: Finance_Team_Approval
  Description: This will go to the Finance Team for approval.
  Criteria: Field- Expense: Total Amount
  Operator: Greater than
  Value: 12000
  Approvers: User: Priya Finance

Final Approval Actions-

- *Add New:* Field Update
- *Name:* Status Approve
- *Unique Name:* Status_Approve
- *Description:* Changing the status of the record to approved
- *Object:* Expense
- *Field to Update:* Status
- *Value:* Approved

Final Rejection Actions-

- *Add New:* Field Update
- *Name:* Status Reject
- *Unique Name:* Status_Reject
- *Description:* Changing the status of the record to Reject
- *Object:* Expense
- *Field to Update:* Status
- *Value:* Rejected



FLOW BUILDER:-

1) **Record-Triggered Flow:**
   When an *Expense record* is created with *its status field as Submitted* and the *Total Amount is above the threshold* then, *Launch Approval Process*.

   Creating the Flow:
   - *New Automation Type:* Record-Triggered flow
   - *Configure Start-*
     Object: Expense
     Configure Trigger: A record is created or updated
     Optimize Flow: Actions and Related Records (After Save)
     Set Entry Condition: Condition Requirement- All Conditions Are Met (AND)
     Condition 1: Field: Status
     Operator: Equals
     Value: Submitted
     Condition 2: Field: Total Amount
     Operator: Greater Than
     Value: 3000
   - *Decision-*
     Label: Need Approval
     API Name: Need_Approval

     Outcome 1 Details:
     Label- Send Approval
     Outcome API Name- Send_Approval
     Condition Requirements to Execute Outcome- All Condition Are Met (AND)
     Resource: Expense__c > Total Amount
     Operator: Greater Than
     Value: 3000

     Outcome 2 Details:
     Label: Auto Approval
     Outcome API Name- Auto_Approval
     Condition Requirements to Execute Outcome: All Condition Are Met (AND)
     Resource: Expense__c > Total Amount
     Operator: Greater Than
     Value: 3000

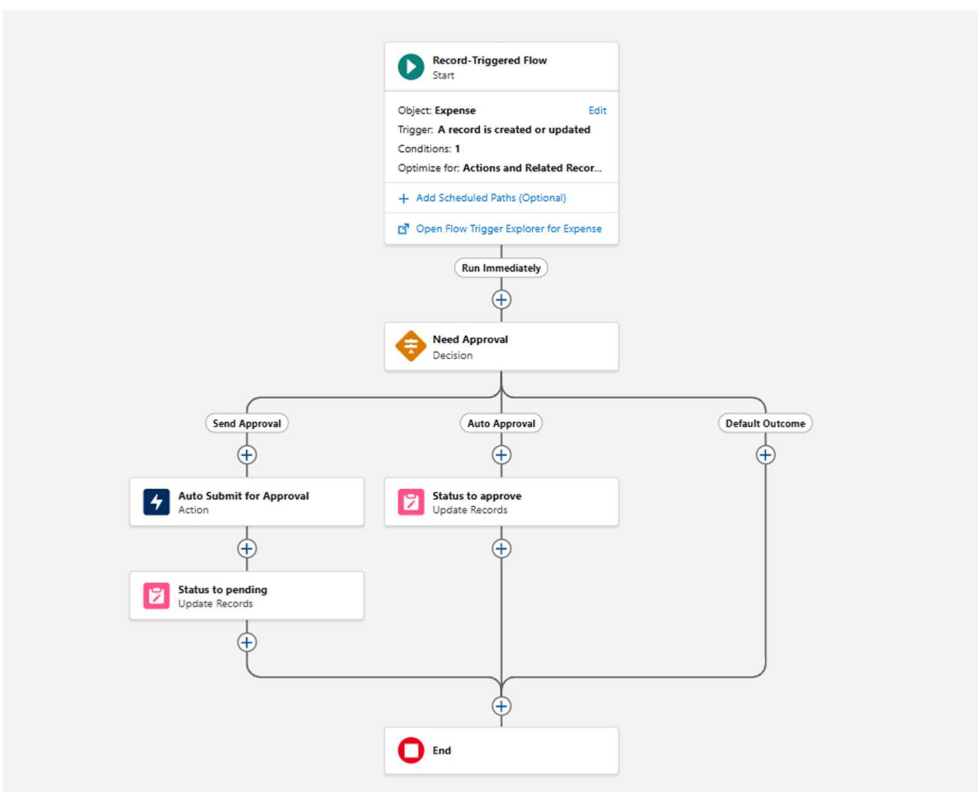
     Outcome 1 Action:
     Label: Auto Submit for Approval
     API Name: Auto_Submit_for_Approval

Outcome 1 Update Record:
Label- Status to pending
API Name - Status_to_pending
How to Find Records to Update and Set Their Values: Use the expense record that triggered the flow
Field Value- Field: Status
Value: Pending Approval

Outcome 2 Update Record:
Label: Status to approve
API Name: Status_to_approve
How to Find Records to Update and Set Their Values: Use the expense record that triggered the flow
Field Value- Field: Status
Value: Approved

Saving the Flow:
Flow Label: Launch Approval Process
Flow API Name: Launch_Approval_Process

Finally Activating It



2) **Scheduled-Triggered Flow:**
To send a weekly Reminder to *the Manager* for *"Pending Approval" Expenses.*

Creating the Flow:

- *New Automation Type:* Scheduled-Triggered flow
- *Set a Schedule-*
  Start Date: Sep 21, 2025
  Start Time: 12:00 AM
  Frequency: Weekly
- *Get Records-*
  Label: Get Pending Expense
  API Name: Get_Pending_Expenses
  Object: Expense
  Filter: Condition Requirements- All Conditions Are Met (AND)
  Condition 1: Field- Status
  Operator: Equals
  Value: Pending Approval
- *Decision-*
  Label: Pending Detail
  API Name: Pending_Detail

  Outcome Detail 1:
  Label- When there is value
  API Name- When_there_is_value
  Condition Requirements to Execute Outcome: All Condition Are Met (AND)
  Resource: Expense from Get Pending Expenses
  Operator: Is Empty
  Value: False

- *Loop-*
  Label: Loop Pending Expenses
  API Name: Loop_Pending_Expenses
  Collection Variable: Get Pending Expense
  Direction: First Item to Last Item

(Inside Loop)

- *Get Record-*
  Label: Get Employee Manager
  API Name: Get_Employee_Manager
  Object: User
  Filter: Condition Requirements- All Conditions Are Met (AND)
  Condition 1: Field- User ID
  Operator: Equals

Value: Loop Pending Expenses> user

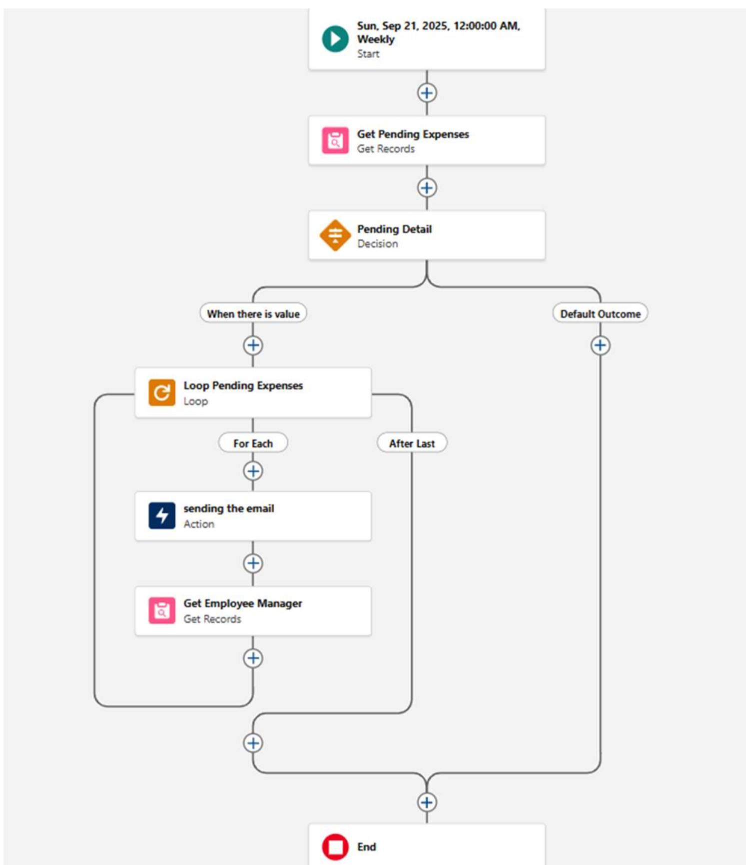
Select Fields: Choose fields

Manager Id

Email

- *Send Email-*
  Label: sending the email
  API Name: sending_the_email
  Recipient Address List: User from Get Employee Manager
  Subject: loop pending Expenses> record type id
  Email Body: This expense requires your approval. Amount: {!Loop_Pending_Expenses.Total_Amount__c}

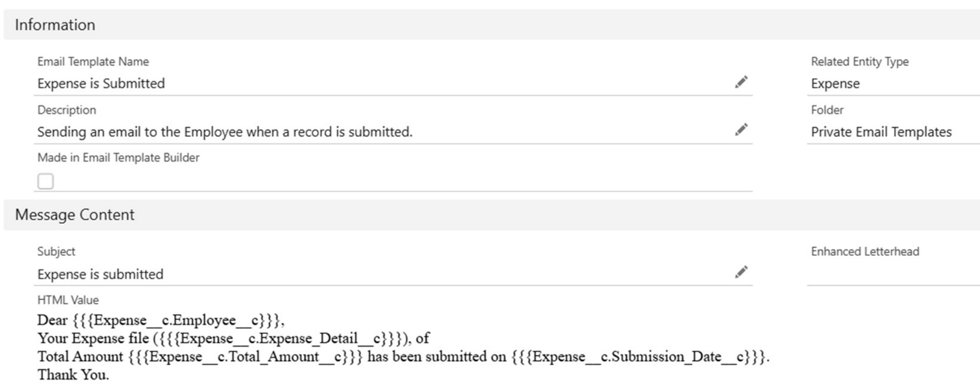
- *Saving the flow-*
  Label: Pending Approval
  API Name: Pending_Approval



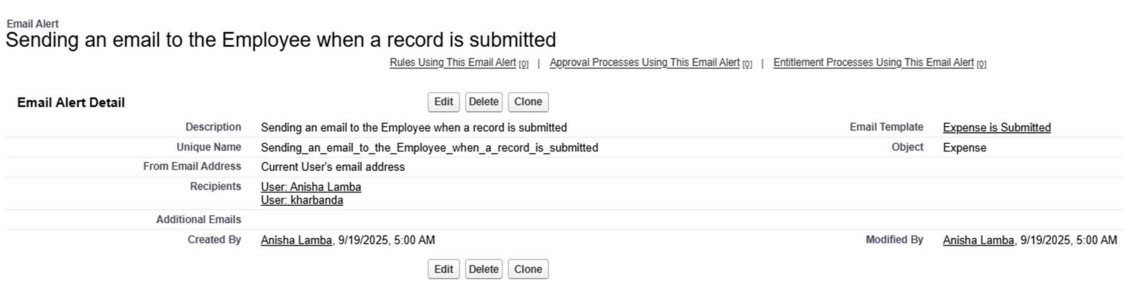
EMAIL ALERTS:-

1) Expense is Submitted: Sending an email to the Employee when a record is submitted**.**

Email Template:
Email Template Name: Expense is Submitted
Description: Sending an email to the Employee when a record is submitted.
Related Entity Type: Expense
Folder: Public Email Templates
(Message Content)
Subject: Expense is submitted
Html Value:
Dear {{{Expense__c.Employee__c}}},
Your Expense file ({{{Expense__c.Expense_Detail__c}}}), of
Total Amount {{{Expense__c.Total_Amount__c}}} has been submitted
on {{{Expense__c.Submission_Date__c}}}.
Thank You.



Email Alert:
Description: Sending an email to the Employee when a record is submitted
Unique Name: Sending_an_email_to_the_Employee_when_a_record_is_submitted
Object: Expense
Email Template: Expense Approval Template
Recipient Type: User



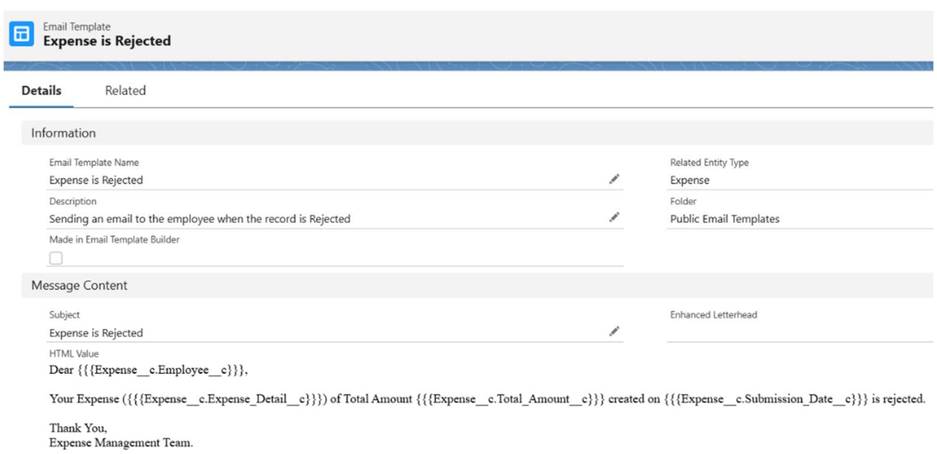
2) Expense is Approved: Sending an email to the employee when the record is Approved.
This was made before during the Workflow Rule.

3) Expense is Rejected: Sending an email to the employee when the record is Rejected.

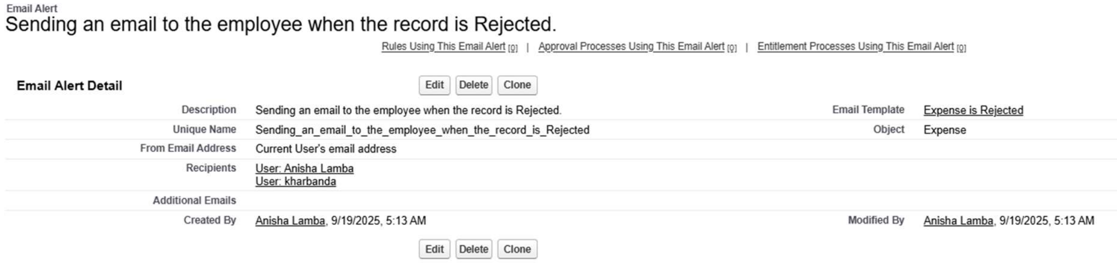
Email Template:
Email Template Name: Expense is Rejected
Description: Sending an email to the employee when the record is Rejected.
Related Entity Type: Expense
Folder: Public Email Templates
(Message Content)
Subject: Expense is Rejected
Html Value:
Dear {{{Expense__c.Employee__c}}},

Your Expense ({{{Expense__c.Expense_Detail__c}}}) of Total Amount {{{Expense__c.Total_Amount__c}}} created on {{{Expense__c.Submission_Date__c}}} is rejected.

Thank You,
Expense Management Team.



Email Alert:
Description: Sending an email to the Employee when a record is submitted
Unique Name: Sending_an_email_to_the_Employee_when_a_record_is_submitted
Object: Expense
Email Template: Expense is Rejected.
Recipient Type: User



FIELDS UPDATE:-

It was made during the Approval Process

TASKS:-

With the help of task let's make a Task for Employee if Expense is rejected, they have to correct it and then resubmit it.

Making a Record-Triggered Flow for this Task.

a. *Configure Start-*

    Object: Expense
    Configure Trigger: A record is updated
    Optimize Flow: Actions and Related Records (After Save)
    Set Entry Condition: Condition Requirement- All Conditions Are Met (AND)
    Condition 1: Field: Status
        Operator: Equals
        Value: Rejected

b. *Create Records-*

    Label: Create Resubmission Task
    API Name: Create_Resubmission_Task
    How to set record field value: Manually
    How Many Records to Create: One
    Object: Task
    Value 1: Field- Subject
        Value- "Resubmit Expense with Corrections"
    Value 2: Field- Priority
        Value- High
    Value 3: Field- Status
        Value- Not Started
    Value 4: Field- Due Date Only
        Value- TODAY() + 3
    Value 5: Field- Related To ID
        Value- Expense> Created by ID
    Value 6: Field- Assigned To ID
        Value- Expense> Owner ID

c. *Saving the Flow-*

Label- Expense_Rejected_Create_Task_Flow

API Name- Expense_Rejected_Create_Task_Flow

Activate it