Phase 7: Post-Deployment Support & Continuous Improvement – Expense Approval System

Name: Shaik Javeed Ahammad

1.Phase Overview

Phase 7 focuses on post-deployment support, monitoring, user feedback, and continuous improvement for the Expense Approval System. After the system is live, this phase ensures that expense requests, approvals, and email notifications function reliably, while the system remains scalable, secure, and aligned with organizational needs.

2.. Objectives of Phase 7

• Monitor live system behavior for expense submissions and approvals.

• Provide user support for employees submitting requests and managers approving them.

• Collect feedback on approval times, notification clarity, and usability.

• Implement enhancements based on feedback, such as faster approval flows or email formatting improvements.

• Ensure compliance with company policies and maintain audit trails.

3. Post-Deployment Monitoring

3.1. Expense Request Flow Monitoring

• Check that new expense requests correctly trigger ExpenseRequestTrigger.

• Confirm that status updates (Pending → Approved/Rejected) happen automatically via flows.

• Monitor bulk expense submissions to ensure triggers handle multiple records without errors.

3.2. Email Notification Monitoring

• Verify that emails to managers are sent when a request is submitted.

• Ensure employees receive notifications when their requests are approved or rejected.

• Track dynamic email content for accuracy (amount, type, comments).

3.3. Performance Metrics

• Average approval time per request.

• Number of pending approvals at any given time.

• Flow and trigger execution times to avoid Salesforce governor limits.

4. User Support & Issue Management

4.1. Common Issues

• Expense requests not triggering approval flows.

• Emails not being delivered or missing content.

• Unauthorized status changes attempted by employees.

• Validation errors on amounts or missing fields.

4.2. Resolution Process

• Investigate trigger logs (ExpenseRequestTrigger) for failed executions.

• Check Flow interviews for errors.

• Verify field-level security and profile permissions for access issues.

• Apply bug fixes in Sandbox, test, then deploy to Production.

5. Feedback & Continuous Improvement

5.1. Feedback Collection

• Gather input from employees and managers on:

o Ease of submitting expense requests.

o Clarity of approval notifications.

o Timeliness of approvals.

o Suggestions for multi-level approval or threshold-based routing.

5.2. Planned Enhancements

• Multi-level approval based on amount thresholds (e.g., >₹5000 goes to higher manager).

• Integrate with Finance/ERP system for automatic reimbursement tracking.

• Add mobile-friendly interface for submission and approval.

• Provide dashboard for managers showing pending approvals and trends.

6. Security & Compliance

• Field-level security ensures employees cannot alter approval status.

• Audit trail tracks all changes to expense records.

• Manager-only access to approval and comment fields.

• Regular review of profiles, permission sets, and sharing rules to maintain data integrity.

7. Reporting & Analytics

• Reports for: o Total expense requests submitted and approved.

o Average approval times per department.

o Most frequent expense categories.

o Rejected requests with reasons.

• Helps identify approval bottlenecks and areas for process improvement.

8. Knowledge Base & Documentation

• Updated user manuals with new enhancements.

• FAQs on handling rejected requests or missing notifications.

• Documented post-deployment bug fixes and workflow changes for future reference.

9. Lessons Learned

• Real-time monitoring of triggers (ExpenseRequestTrigger) and flows prevents unnoticed failures.

• Feedback from actual users helps refine approval flows and email content.

• Bulk processing and validation rules are essential for large-scale deployment.

• Proper security ensures compliance and prevents accidental data manipulation.

10. Conclusion Phase 7

ensures that the Expense Approval System continues running smoothly after deployment. By monitoring triggers, flows, and notifications, providing support, and implementing user-driven enhancements, the system achieves:

• Faster and accurate approvals.

• Reduced errors and miscommunication.

• Enhanced transparency and user satisfaction.

• Scalable, secure, and compliant expense management.