

EXPENSE TRACKER APP

Phase 4: Process Automation — Expense Tracker

Step 1 — Validation Rules

Purpose: Ensure data integrity (e.g., Amount must be positive, Expense Date not in the future).

Navigation:

Setup → Object Manager → Expense → Validation Rules → New

Rules to Create:

1. Expense Amount Positive

- Rule Name: Amount_Positive
- Formula: Amount__c <= 0
- Error Message: “Expense amount must be greater than 0”
- Error Location: Field → Amount

2. Expense Date Not Future

- Rule Name: Date_Not_Future
- Formula: Expense_Date__c > TODAY()
- Error Message: “Expense date cannot be in the future”
- Error Location: Field → Expense Date
- Save each rule

The screenshot shows the 'Expense Validation Rule' detail page in the Salesforce Object Manager. The left sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Expense Validation Rule' and shows the 'Validation Rule Detail' section. It contains the following data:

Rule Name	Amount_Positive	Active
Error Condition Formula	Amount__c <= 0	✓
Error Message	Expense amount must be greater than 0	Error Location
Description		Amount
Created By	John Manager, 10/9/2025, 2:09 PM	Modified By
		John Manager, 10/9/2025, 2:09 PM

At the bottom of the detail page, there are 'Edit' and 'Clone' buttons.

Expense Validation Rule

[Back to Expense](#)

Validation Rule Detail

Rule Name	Date_Not_Future	Active
Error Condition Formula	Expense__Date__c > TODAY()	✓
Error Message	Expense date cannot be in the future	Error Location
Description		Expense Date
Created By	John Manager, 10/9/2025, 2:22 PM	Modified By
		John Manager, 10/9/2025, 2:22 PM

[Edit](#) [Clone](#)

[Edit](#) [Clone](#)

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Step 2 — Approval Process (Manager Approval)

Purpose: Expenses above a threshold require manager approval.

Navigation:

Setup → Approval Processes → Expense → Create New Approval Process → Use Standard Setup Wizard

Configuration:

- Name: Expense Manager Approval
- Entry Criteria: Amount __c > 5000 (or your chosen threshold)
- Approver: Manager (via Employee lookup field)
- Initial Submission Actions: Optional Email Alert to Manager

Approval Step: Manager Approval Step

- Assigned Approver: Manager (automatically via Employee → Manager field)
- Approval Actions: Field Update → Approval_Status__c = Approved
- Rejection Actions: Field Update → Approval_Status__c = Rejected
- Optional: Add Email Alerts to notify Employee

Submitters: Expense Owner only

Activate the approval process.

All Email Alerts

Email alerts are used to send emails from a flow or other automation.

View: All Email Alerts Create New View

Help for this Page ?

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Description	Email Template Name	Object	Last Modified Date
Edit Del	Notify Employee on Expense Approval	Expense Submitted for Approval	Expense	10/9/2025

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Step 3 — Record-Triggered Flow (Auto-Update Fields)

Purpose: Automatically update status after approval.

Navigation:

Setup → Flow → New Flow → Record-Triggered Flow

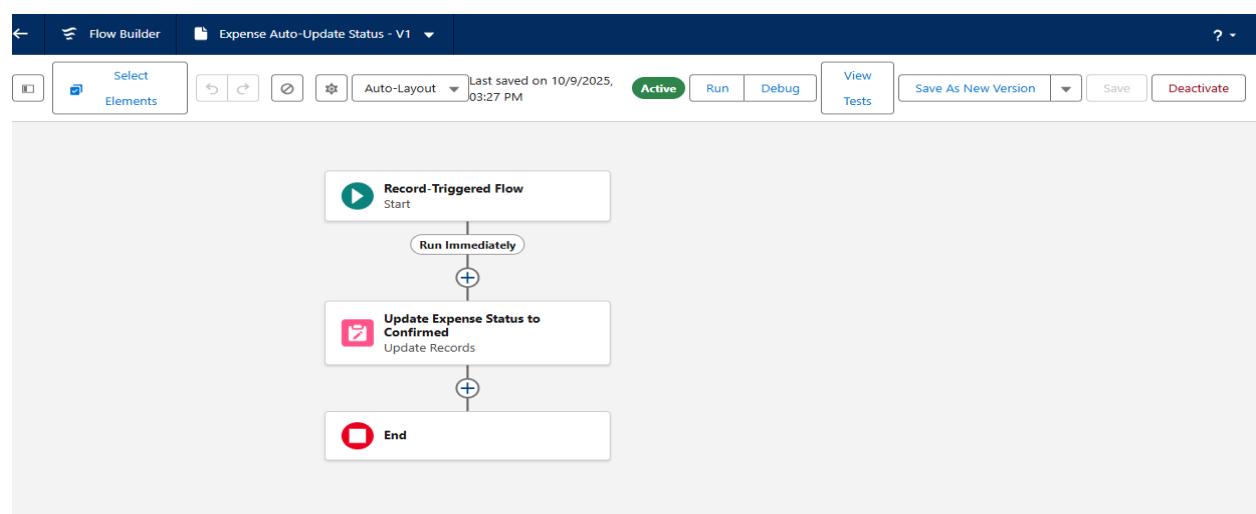
Configuration:

- Object: Expense
- Trigger: When record is created or updated
- Condition: Approval_Status__c = Approved

Element — Update Records

- Label: Update Expense Status to Confirmed
- Records to Update: Record that triggered the flow
- Field Update: Expense_Status__c = Confirmed

Save & Activate Flow.



Step 4 — Screen Flow (Employee Submission Form)

Purpose: Provide a guided form for employees to submit expenses.

Navigation:

Setup → Flow → New Flow → Screen Flow

Supported Channels:

- Desktop
- Mobile

Screen Element — Input Fields:

Field	Data Type	Required	Notes
Amount	Currency	Yes	Ensures employee enters a value
Expense Date	Date	Yes	Prevents missing dates
Category	Picklist	Optional	Travel, Food, Other
Description	Text Area	Optional	Notes or remarks

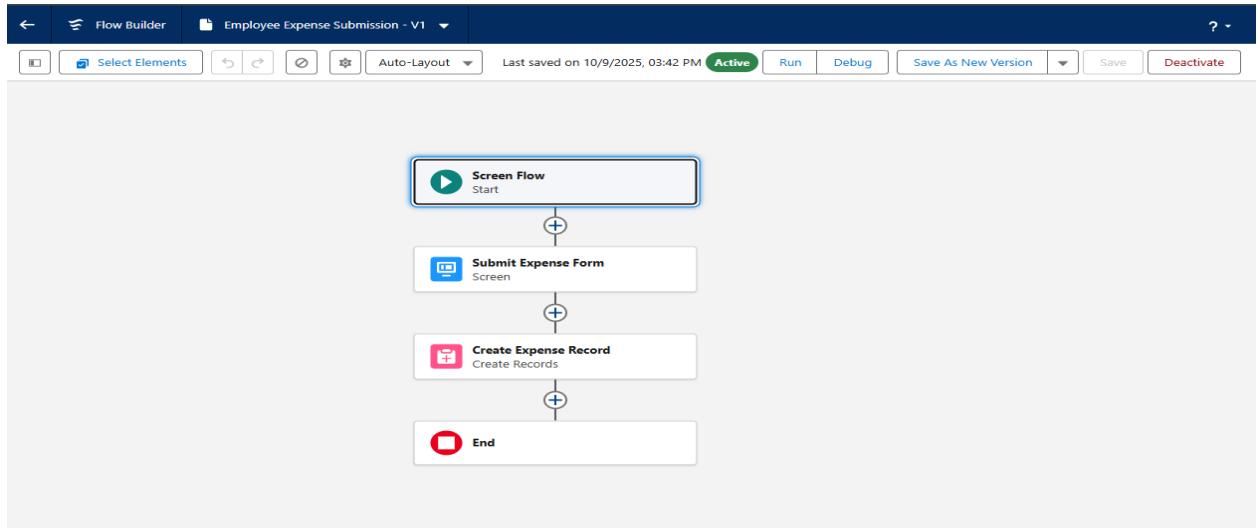
Create Records Element:

- Label: Create Expense Record
- Map Fields: Screen input → Expense object fields
- Employee__c: \$User.Id (current logged-in user)

Flow Connection:

Start → Screen → Create Records → End

Save & Activate Flow.



Step 5 — Email Alerts

Purpose: Notify Employee or Manager when expense is submitted/approved.

Navigation:

Setup → Email Alerts → New

Configuration:

- Related Object: Expense
- Recipients: Employee (submission), Manager (approval)
- Email Template: Include Expense Number, Amount, Date, Status
- Assign alert in Approval Process or Flow

Step 6 — Tasks (Optional)

Purpose: Notify employees to submit receipts or managers to review expenses.

Navigation:

Setup → Object Manager → Expense → Buttons, Links, and Actions → New Action → Create Task

Configuration:

- Subject: “Review Expense”
- Due Date: Optional
- Assigned To: Employee or Manager
- Trigger via Flow or Approval Process

Step 7 — Custom Notifications (In-App)

Purpose: Notify managers/employees inside Salesforce after approval.

Navigation:

Setup → Notification Builder → New Notification Type

- Name: Expense Notification

Flow Action:

- Add Send Custom Notification element after approval
- Recipient: Manager or Employee
- Message: “Expense [Expense Number] has been approved”

Activate notification.

The screenshot shows the Salesforce Setup interface for 'Custom Notifications'. At the top, there's a 'SETUP' button and a 'Custom Notifications' section with a gear icon. Below this, a note states: 'When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.' A 'Custom Notification Types' table follows, with a 'New' button in the top right corner. The table has columns: NOTIFICATION NAME, API NAME, NAMESPACE, DESKTOP, and MOBILE. It lists two entries: 'enablement_coaching_feedback_ready' and 'Expense Notification'. The 'Expense Notification' row has checkmarks in the DESKTOP and MOBILE columns.

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	▼
Expense Notification	Expense_Notification		✓	✓

Phase 4 Complete

- Employees submit expenses via Screen Flow
- Expenses automatically validate, route for approval, update status, and notify relevant users