EXPENSE TRACKER APP

Phase 4: Process Automation — Expense Tracker

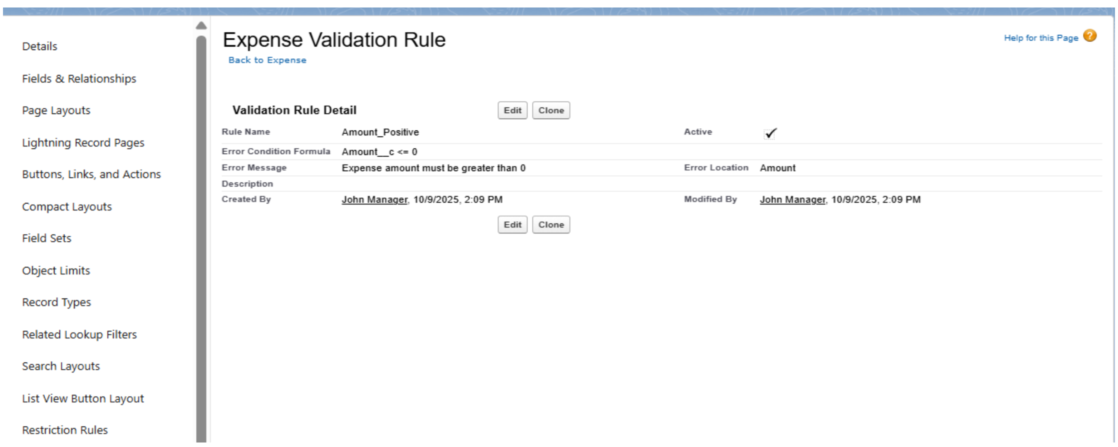
Step 1 — Validation Rules

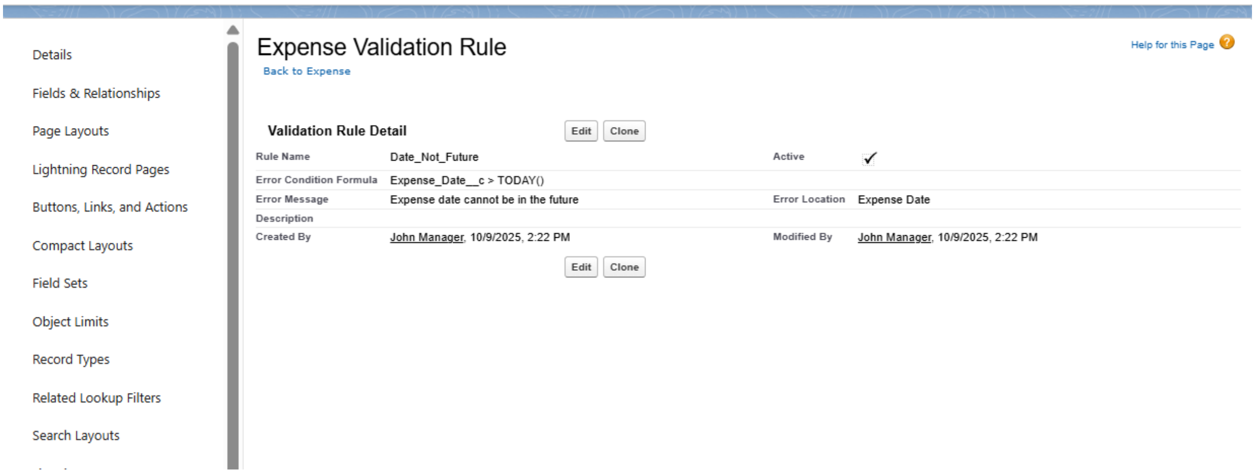
Purpose: Ensure data integrity (e.g., Amount must be positive, Expense Date not in the future).

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





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:

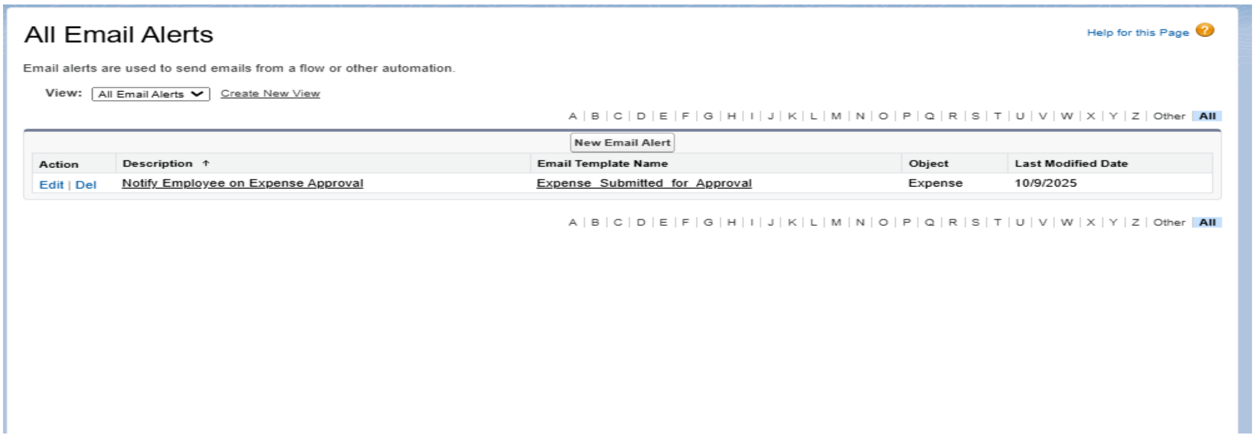
- Name: Expense Manager Approval
- Entry Criteria: Amount__c > 5000 (or your chosen threshold)
- Approver: Manager (via Employee lookup field)
- Initial Submission Actions: Optional Email Alert to Manager

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.



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

Purpose: Automatically update status after approval.

Navigation:
Setup → Flow → New Flow → Record-Triggered Flow

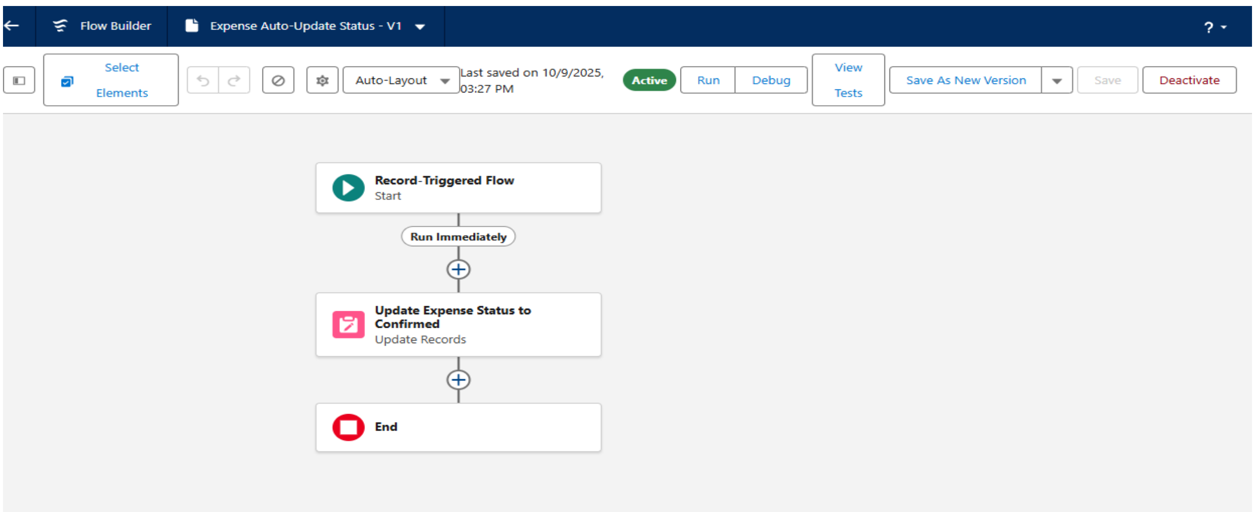
Configuration:

- 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

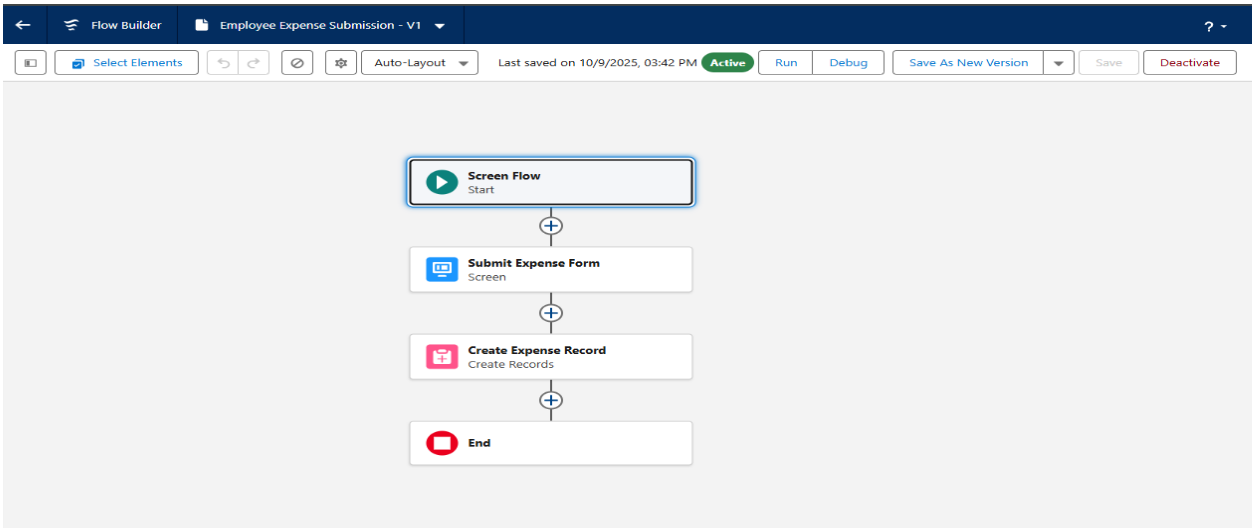
Create Records Element:

- 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.

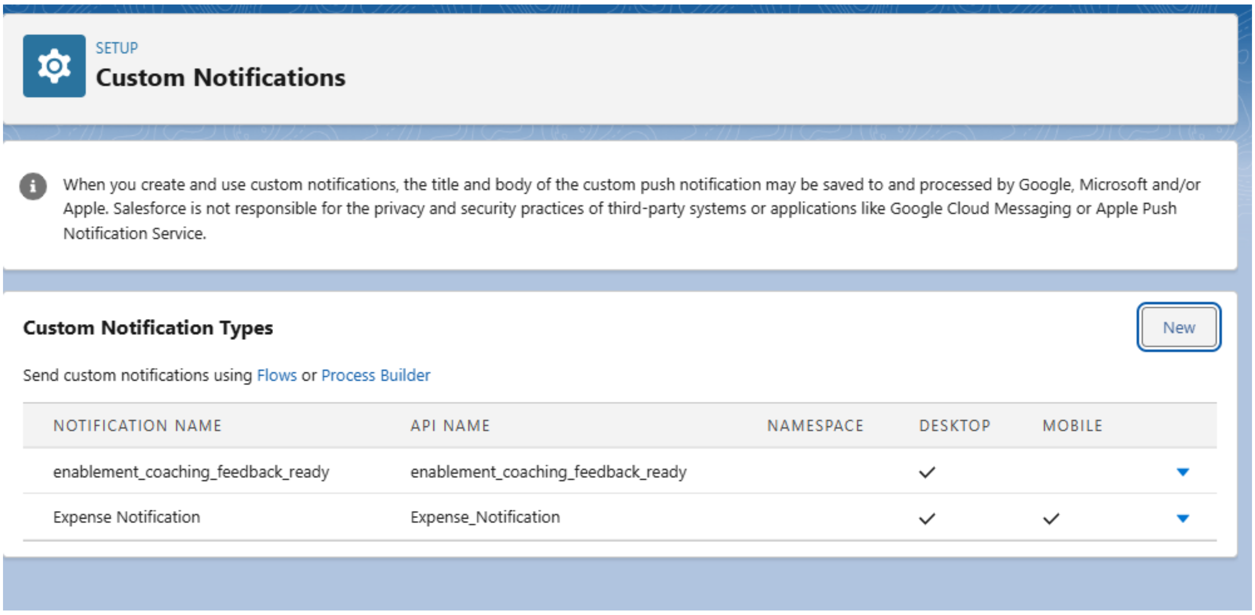
Navigation:
Setup → Notification Builder → New Notification Type

- 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.



✅ **Phase 4 Complete**

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