



Corporate Travel & Expense Management System

Phase 4: Process Automation (Admin)

 **Goal:** Automate travel & expense workflows to save time, ensure compliance, and improve approvals.

1. Validation Rules

- **End Date must be after Start Date** in Travel Request.
- **Expense Amount must be greater than 0** in Expense Claim.

 **Object Manager**

Travel Request Validation Rule

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Validation Rule Detail

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Rule Name	Date_Rule	Active	<input checked="" type="checkbox"/>
Error Condition Formula	End_Date__c > Start_Date__c	Error Location	Top of Page
Error Message	End Date Must be greater than start date		
Description			
Created By	Samridh Maurya, 9/24/2025, 1:43 AM	Modified By	Samridh Maurya, 9/24/2025, 1:43 AM

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2. Workflow Rules (*Legacy*)

- When Travel Request is Approved → auto-update Status = “Approved.”
- When Expense Claim is Reimbursed → auto-update a “Reimbursement Date” field.

3. Process Builder (Legacy)

- Auto-update Travel Request Status = Completed once all related Expense Claims are Reimbursed.

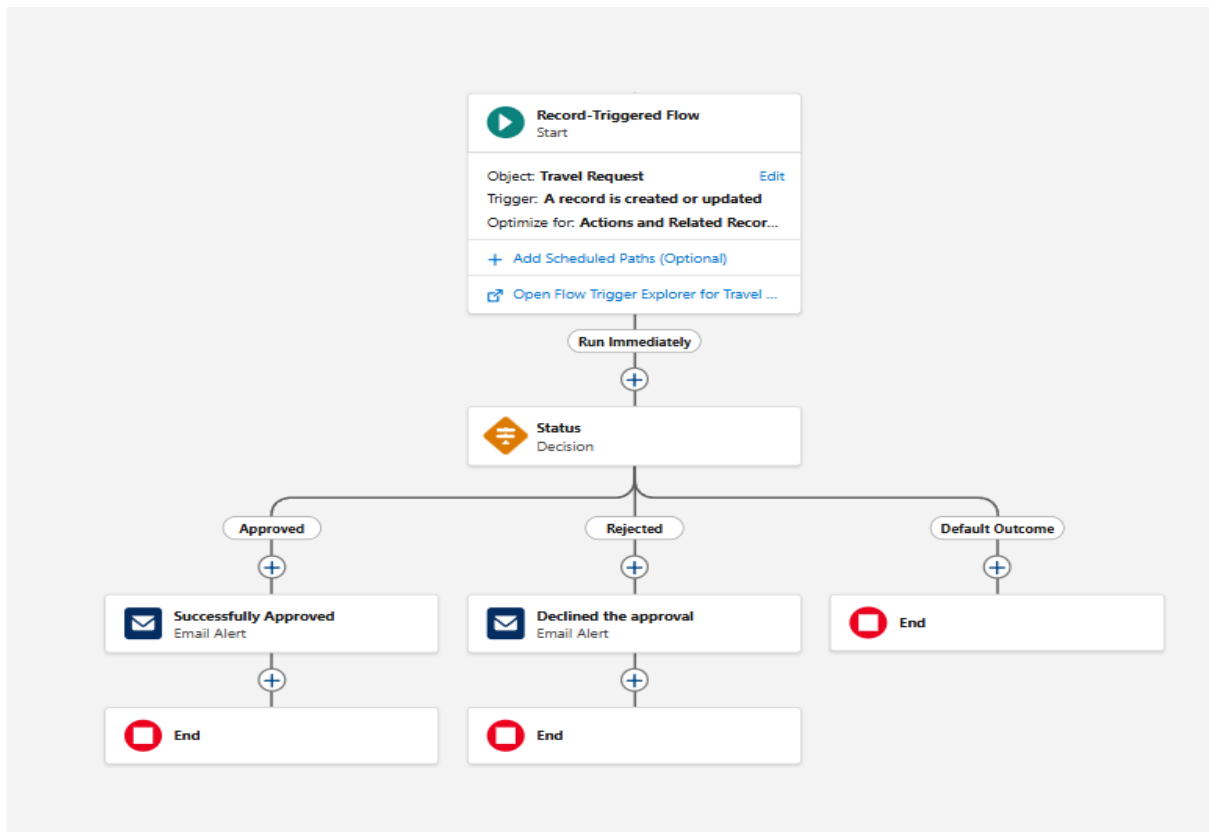
4. Approval Process

- **Travel Request Approval Flow:**
 - ✓ Employee submits Travel Request.
 - ✓ Manager approves/rejects.
 - ✓ Finance verifies estimated cost.
- **Expense Claim Approval Flow:**
 - ✓ Employee submits Expense Claim.
 - ✓ Manager approves if amount > ₹50000.
 - ✓ Finance finalizes for reimbursement.

5. Flow Builder

- ***Record-Triggered Flow*** (Travel Request):
- When status changes → Decision Element →
 - Approved → Update Status = Approved + Email Employee.
 - Rejected → Update Status = Rejected + Email Employee.
 - Default → Notify Manager
- ***Record-Triggered Flow*** (Expense Claim):
- When status changes → Decision Element →
 - Approved → Update Status = Approved + Notify Finance.

- Rejected → Update Status = Rejected + Email Employee.
- Default → Await Manager/Finance action.



6. Email Alerts

- Email to **Manager** when Travel Request is submitted.
- Email to **Employee** after Approval/Rejection of Travel Request or Expense Claim.

7. Field Updates

- After approval → Travel Request Status = *Approved*.
- After rejection → Travel Request Status = *Rejected*.

- After Expense Claim approval → Claim Status = ***Pending Reimbursement.***

8. Tasks

- Create task for Finance user to process reimbursement once claim is approved.
- Create task for Manager if requests remain unapproved for >3 days.

9. Custom Notifications

- In-App Notification to Manager when new Travel Request is submitted.
 - In-App Notification to Employee when claim is approved or rejected.
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