



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

- Travel Request (**Date_Rule__c**):
 - Rule: **End_Date__c** < **Start_Date__c** → Error: *“End Date must be after Start Date.”*
- Expense Claim (**Travel_Expense__c**):
 - Rule: **Amount__c** <= 0 → Error: *“Amount must be greater than 0.”*

 **SETUP**
Object Manager

Travel Request Validation Rule

[Back to Travel Request](#)

Validation Rule Detail

Edit

Clone

Rule Name	Date_Rule	Active	<input checked="" type="checkbox"/>
Error Condition Formula	End_Date__c > Start_Date__c		
Error Message	End Date Must be greater than start date	Error Location	Top of Page
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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[SETUP](#) > [OBJECT MANAGER](#)

Expense Claim

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Expense Claim Validation Rule

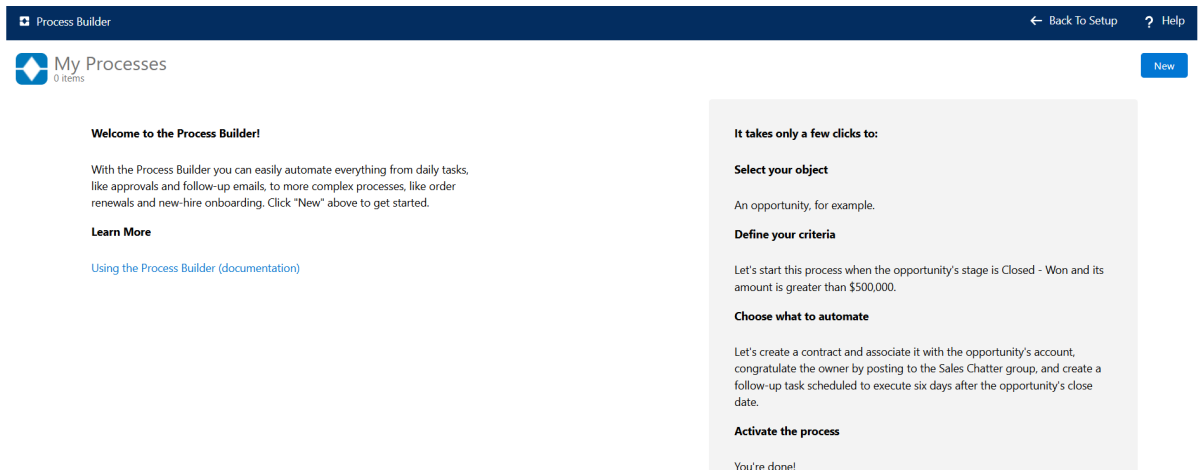
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Validation Rule Detail			
Rule Name	Travel_Expense	Active	<input checked="" type="checkbox"/>
Error Condition Formula	ISBLANK(Travel_Request__C)		
Error Message	Every Expense Claim must be linked to a Travel Request	Error Location	Top of Page
Description	To ensure every Expense Claim is linked to a Travel Request		
Created By	Samrith Maurya, 9/19/2025, 6:58 AM	Modified By	Samrith Maurya, 9/19/2025, 6:58 AM

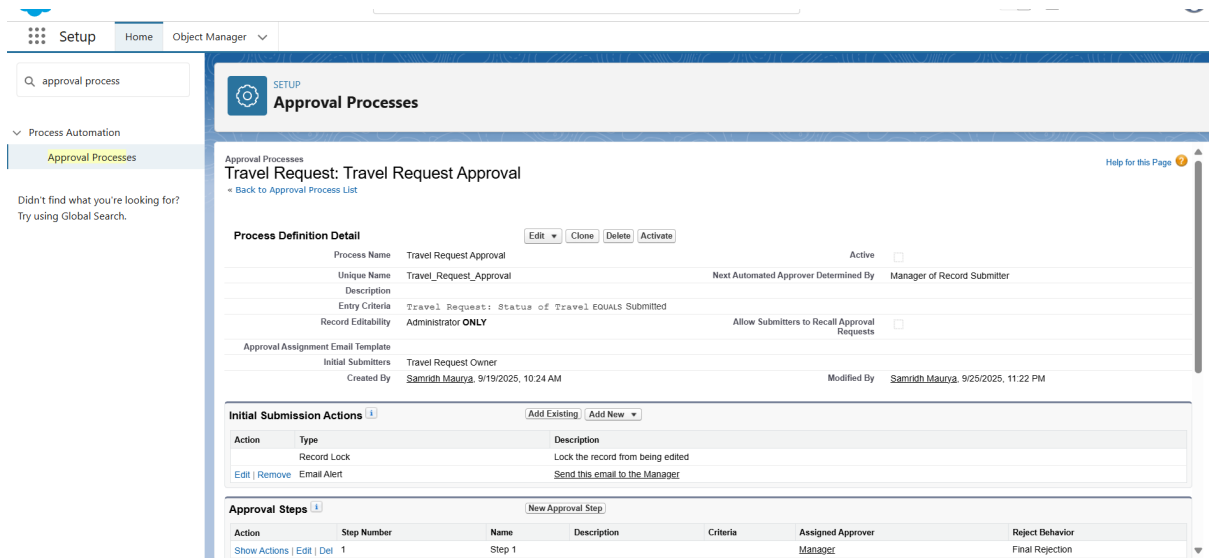
- On create of **Travel_Request__c** → Auto-send email → auto-update Status = “Approved.”
- When Expense Claim is Reimbursed → auto-update a “Reimbursement Date” field.

- Could auto-update **Travel_Request__c.Status__c** → replaced by Flow, once all related Expense Claims are Reimbursed.



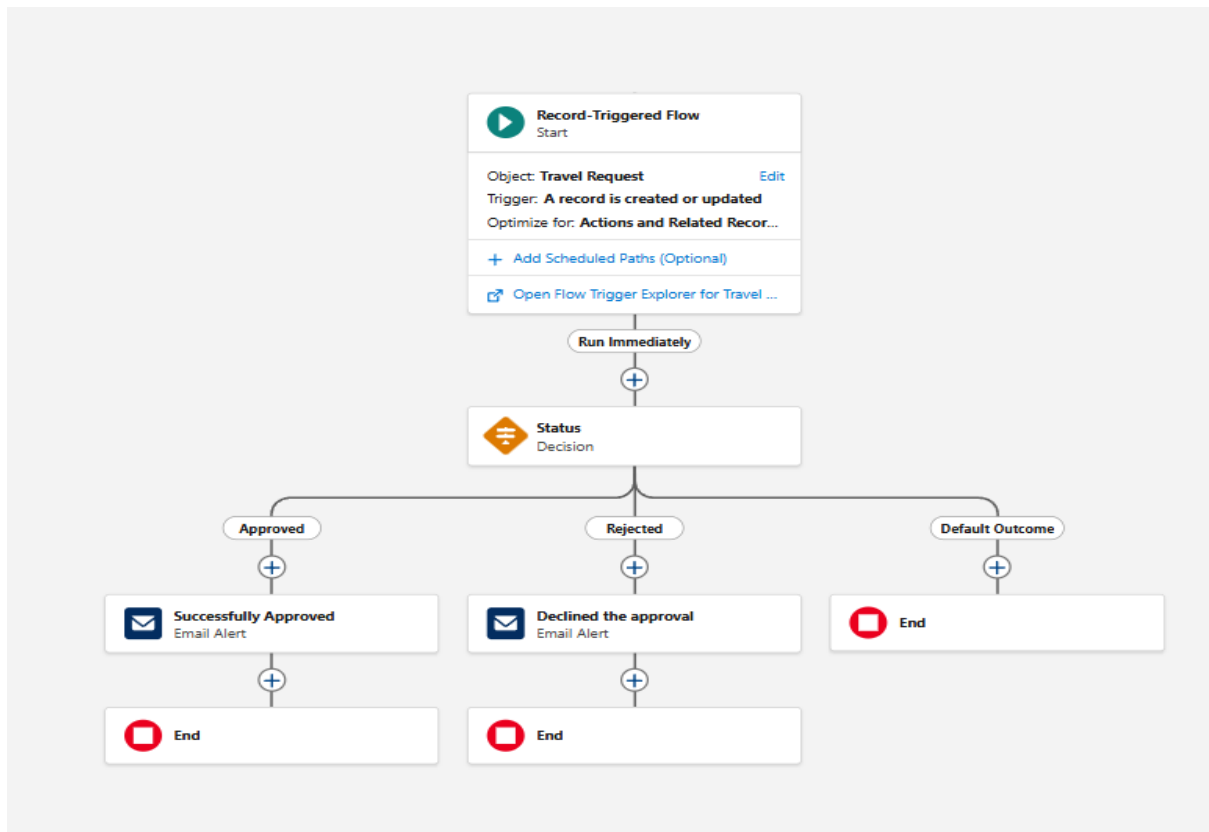
4. Approval Process

- **Travel Request (Expense_Claim__c):**
 - If **Estimated_Cost__c** > 5000 → route to Manager (**Manager_Profile__c**).
 - ✓ Employee submits Travel Request.
 - ✓ Manager approves/rejects.
 - ✓ Finance verifies estimated cost.
- **Expense Claim (Travel_Expense__c):**
 - If **Amount__c** > 5000 → requires Manager + Finance approval.
 - ✓ Employee submits Expense Claim.
 - ✓ Manager approves if amount > ₹50000.
 - ✓ Finance finalizes for reimbursement.



5. Flow Builder

- **Record-Triggered Flow (Travel_Request__c):**
 - When record is created/updated → Decision Element
 - **Approved:** Update Status__c = "Approved" + send Email Alert.
 - **Rejected:** Update Status__c = "Rejected" + send Email Alert.
 - **Default (Submitted)** → Notify Manager.
- **Record-Triggered Flow (Expense_Claim__c):**
 - When record is updated → Decision Element:
 - **Approved:** Update Status__c = "Approved" + notify Finance.
 - **Rejected:** Update Status__c = "Rejected" + send Email Alert.
 - **Default (Submitted)** → Await Manager/Finance action.



6. Email Alerts

- Travel Request: Email → Manager (**User.Email**) on submit;
Employee on approve/reject.
- Expense Claim: Email → Finance + Employee on approve/reject.

Process Automation

Workflow Actions

Email Alerts

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SETUP

Email Alerts

All Email Alerts

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

View: All Email Alerts Create New View

Action	Description	Email Template Name	Object	Last Modified Date
Edit Del	Confirmation of travel	Approved by Manager	Travel Request	9/19/2025
Edit Del	Rejection on travel	Rejection by Manager	Travel Request	9/19/2025
Edit Del	Send this email to the Manager	Manager Action	Travel Request	9/19/2025

7. Field Updates

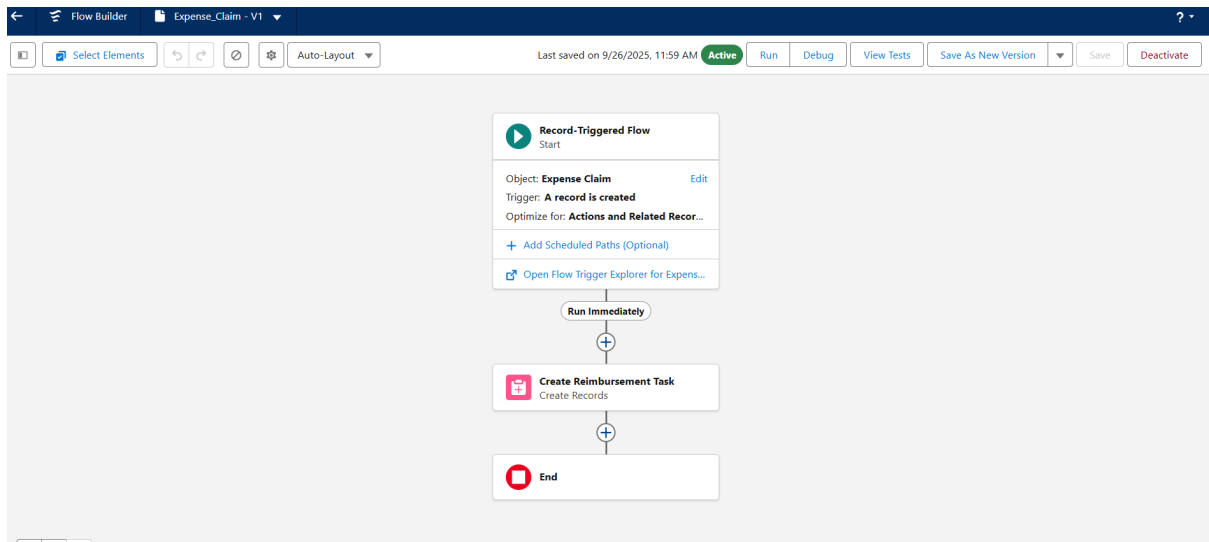
- On Travel Request approval → **Travel_Request__c.Status__c** = "Approved".
- On Travel Request rejection → **Travel_Request__c.Status__c** = "Rejected".
- On Expense Claim approval → **Expense_Claim__c.Status__c** = "Pending_Reimbursement".

The screenshot shows the Salesforce 'Field Updates' setup page. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Field Updates' and 'All Workflow Field Updates'. It includes a search bar, a 'View' dropdown set to 'All Workflow Field Updates', and a table of field updates. The table has columns for Action, Name, Field to Update, Operation, Value, and Last Modified Date. The table lists four field updates: 'Changes the case priority to high', 'New Field', 'Travel Approval', and 'Travel Rejection'.

Action	Name	Field to Update	Operation	Value	Last Modified Date
Edit Del	Changes the case priority to high.	Case: Priority	Value	High	7/20/2025
Edit Del	New Field	Account: Account Source	Value	Web	8/12/2025
Edit Del	Travel Approval	Travel Request: Status of Travel	Value	Approved	9/19/2025
Edit Del	Travel Rejection	Travel Request: Status of Travel	Value	Rejected	9/19/2025

8. Tasks

- Auto-create Task (**Task.WhatId = Expense_Claim__c.Id**) → assigned to Finance for reimbursement.
- Task for Manager if Travel Requests remain **Status__c** = "Submitted" for > 3 days.



9. Custom Notifications

- To Manager → when **Travel_Request__c** is submitted.
 - To Employee → when **Expense_Claim__c.Status__c** changes to Approved/Rejected.
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