

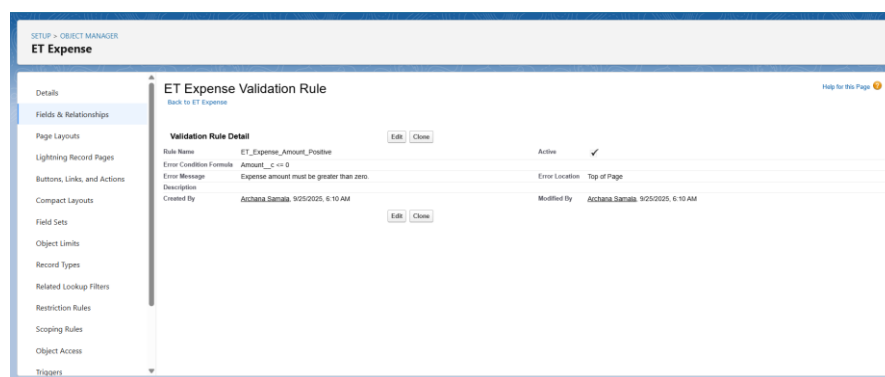
Phase 4: Process Automation (Admin)

In this phase of my Expense Tracker project, I implemented different automation features in Salesforce to make the system smarter and reduce manual work. The focus was on enforcing data quality, sending automatic alerts, and controlling expense approvals. I created a validation rule, an email template with an email alert, a record-triggered flow, and an approval process.

1.Validation Rule — Expense Amount Must Be Greater Than Zero

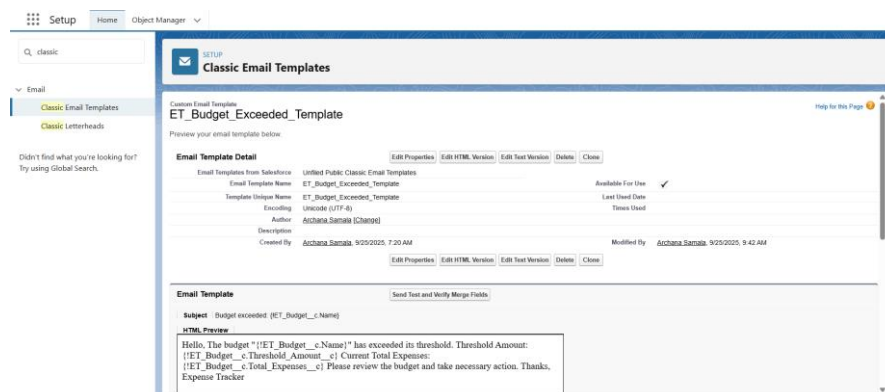
To make sure users cannot enter invalid expenses, I created a validation rule on the ET Expense object.

- With this in place, if anyone tries to create an expense with amount = 0 or less, Salesforce shows an error and does not allow the record to be saved. This helps maintain clean and accurate data.



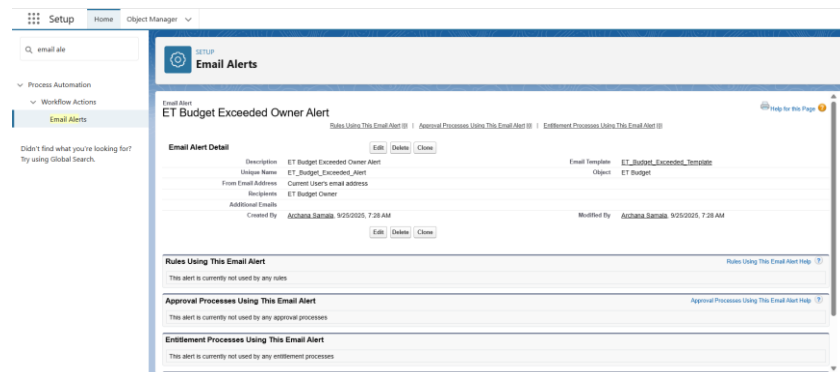
2. Email Template — Budget Exceeded Notification

I designed an email template that is used to notify the budget owner when expenses cross the threshold amount. I created this template under Classic Email Templates so that it can be referenced easily in an Email Alert.



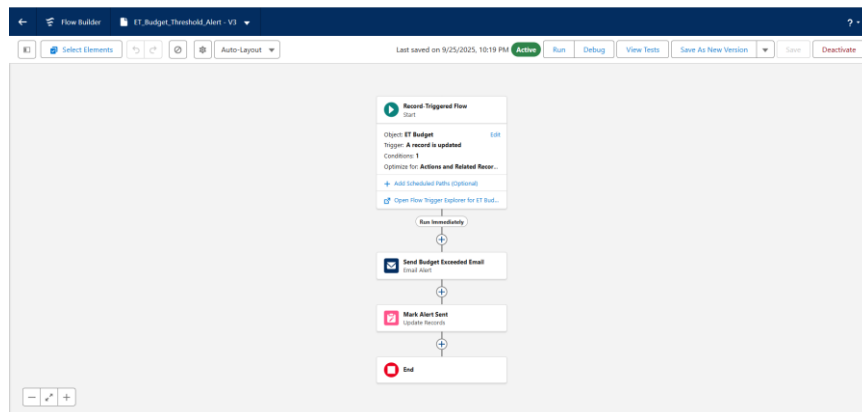
3. Email Alert — Triggering the Budget Exceeded Email

Next, I created an email alert that uses the above template. This email alert is the action that Salesforce can call whenever the flow conditions are met.



4. Record-Triggered Flow — Sending Email When Budget Crosses Threshold

- The heart of the automation is the flow that checks when expenses exceed the budget. I built a Record-Triggered Flow on the ET Budget object.
- This flow ensures that as soon as the budget is overspent, the responsible person is notified automatically without any manual tracking.



5. Approval Process — Manager Approval for High Expenses

Finally, I set up an approval process to bring control and governance into the system. If an expense is too high, it must go through a manager's approval. With this process, whenever an employee submits an expense greater than 500, Salesforce automatically routes it for manager approval. The record stays locked until it is approved or rejected.

6. Testing the Automations

1. **Validation Rule Test:** Tried creating an expense with amount = 0. Salesforce showed the error message and blocked saving.
2. **Email Flow Test:** Created a budget with a threshold of 100 and added expenses totaling 300. The budget owner immediately received the budget exceeded email.

