Reimbursement Workflow and Dashboard

Salesforce Administrator | Q2 [April to June 2024]

One line result

Cycle time dropped from **14** days to **5** days, and the over thirty-day backlog fell by **58%**.

At a glance

Owner	Funmito Abraham-Kaz
Role	Salesforce Administrator
Timeline	Projected Delivery - June 25, 2024; Actual Delivery – June 21, 2024
Duration	Six Weeks
Stakeholders	Finance, Branch managers, Operations, finance reviewer, two branch coordinators

Context

Reimbursement requests arrived by email and chat. Many were incomplete and stalled during review. Leaders lacked a clear view of status and aging.

Objective

Create a guided intake, route to the right reviewers, and give leaders a one page view of work in progress and aging.

Approach and design

- Create a guided intake with required fields and document upload so requests arrive complete.
- Auto route to Finance based on branch and amount and stamp an SLA target date.
- Add a simple approval for larger amounts.
- Prevent duplicates and clean up stale items nightly.
- Give leaders a one-page dashboard with clear aging buckets.

My actions

- Created a Reimbursement custom object with key fields: Requester lookup, Job or Order lookup, Branch, Reason picklist, Amount currency, Status, SLA Target Date formula, Age in days formula, Aging Bucket formula, Approval Status, and a Duplicate Hash text field.
- Added a Reimbursement Line-Item child object for split reimbursements with Line Amount, Reason, Receipt file link, and a Tax flag.
- Built a screen flow for submitters on the Reimbursement object with required fields and inline help
- Built a Record triggered flow sets owner by branch and amount and writes an SLA target date.
- Wrote validation rules to require a receipt when the reason needs one, to prevent Paid without approval, and to lock fields after payment.
- Designed a Lightning Record Page for Finance with a reviewer sidebar, quick actions for approvals and rejections, and a related files section.
- Designed the Lightning Record Page with Dynamic Forms and Dynamic Actions, using component visibility by role and status so submitters see a simple intake and Finance sees approve or reject controls on desktop and mobile

- Set org wide defaults to Private for Reimbursement and Line Item. Created Finance Reviewer and Branch Manager permission sets. Added branch-based sharing rules. Applied field level security to hide sensitive fields from non-Finance users.
- Created an Audit Log custom object that captures every status change, approver, and comment with date and user.
- Delivered a dashboard with queue size, aging buckets, median cycle time, and first pass approval rate by branch.

Challenges and how I resolved them

- Intake was scattered in email and chat and often missing key details. I moved all requests to a guided form with required fields and inline help.
- Rules and approvers were unclear. I embedded a simple policy table in the form that shows required documents and approver by amount.
- Files were hard to find, and duplicates appeared. I required uploads on the record, added a duplicate check on requester plus job plus amount plus date, and linked to the existing request.
- Work stalled without ownership or targets. I routed by branch and amount, set an SLA date, added gentle reminders, and surfaced a daily exception list.
- Audits and reporting were manual. I logged every status change and approver note and built a dashboard for queue size, aging buckets, and median cycle time

UAT and Rollout

- Test data set that covered small, medium, and large amounts and missing receipt cases.
- One week pilot with two branches and a short help guide for submitters and reviewers.
- Deployment through Gearset with environment values for branch routing.

Results

- Cycle time dropped from 14 to 5 days.
- Over thirty-day backlog fell by 58%.
- First pass approvals improved to +90 percent because requests arrived complete.

Project tools used

- Custom Objects and Custom fields
- Screen flows and Record triggered flows
- Custom Formulas, Validation Rules, Lightning Record Pages, Approval Process
- Security Settings
- Reports and dashboards
- Scheduled automation for cleanup
- Gearset for deployments

What I would improve next

- Add a quick pay integration if payments become automated.
- Create a concierge screen for Finance to approve a clean batch in one view.

Privacy note: Client name and sensitive numbers removed.