

Phase 3 – Salesforce Expense Report Approval Process

1. Introduction The purpose of Phase 3 is to implement and document the Approval Process for Expense Reports in Salesforce. In earlier phases, we created the Expense_Report__c object, added the required fields, and configured basic layouts. Phase 3 focuses on introducing automation, decision-making, and approvals using Flows and Approval Processes.

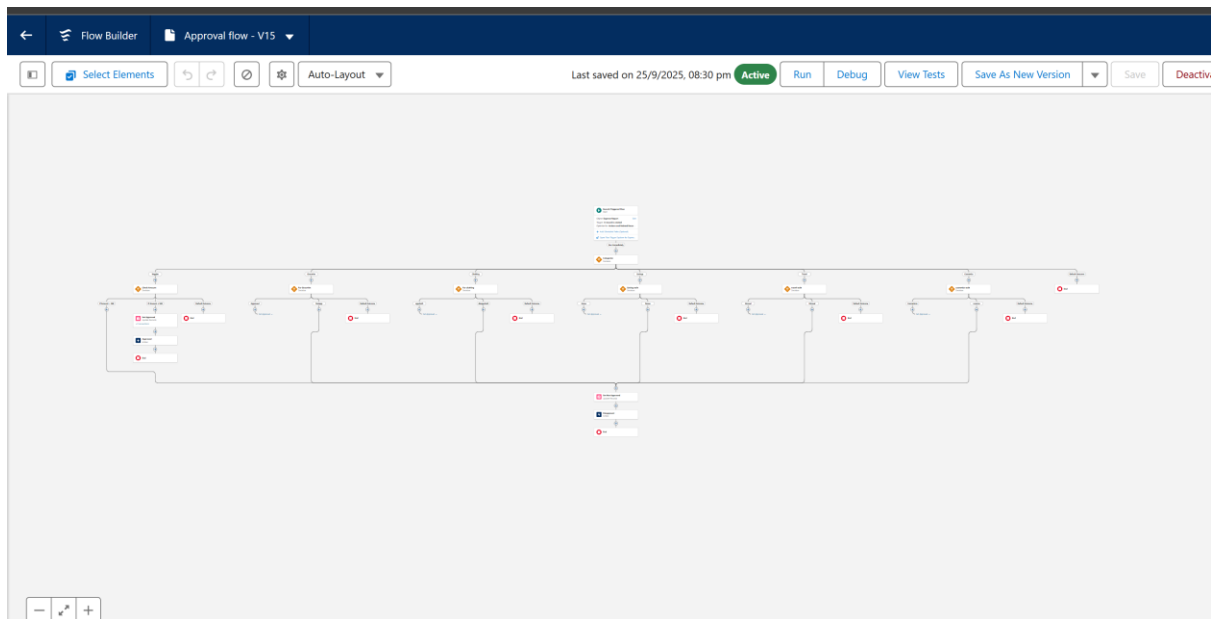
By the end of this phase, the system will be capable of automatically approving smaller expense reports while routing larger ones for manual approval by a manager. This ensures efficiency, compliance, and reduced workload for approvers.

2. Objectives

- Automate the approval process of expense reports.
- Define thresholds to decide between automatic and manual approvals.
- Reduce manual intervention for low-value expenses.
- Improve tracking and transparency of expense approvals.

3. Scope of Work This phase deals with:

- Creating a record-triggered flow that runs when an expense report is submitted.
- Implementing decision logic to check the amount.
- Automatically updating the status for expenses ≤ 500 .
- Submitting the record for manager approval if the amount exceeds 500.
- Testing with real records and verifying notifications.



4. Pre-Requisites Before implementing Phase 3, the following should already exist:

1. Custom Object: Expense_Report__c o Amount__c (Currency/Number) Status__c (Picklist → Submitted, Approved, Rejected, Pending)

2. User Setup o Employee (creates expense report) Manager (approves expense report) Admin (for monitoring/testing)

3. Approval Hierarchy

Manager role assigned as approver for amounts greater than 500.

[Setup](#) > [Object Manager](#)

Expense Report

[Details](#)

[Fields & Relationships](#)

[Page Layouts](#)

[Lightning Record Pages](#)

[Buttons, Links, and Actions](#)

[Compact Layouts](#)

[Field Sets](#)

[Object Limits](#)

[Record Types](#)

[Related Lookup Filters](#)

[Search Layouts](#)

[List View Button Layout](#)

[Restriction Rules](#)

[Scoping Rules](#)

Fields & Relationships
9 Items, Sorted by Field Label

Quick Find
 [New](#)
[Deleted Fields](#)
[Field Dependencies](#)
[Set History Trac](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
Category	Category__c	Picklist		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Expense Report Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(16)		
Owner	OwnerId	Lookup(User.Group)		✓
Status	Status__c	Picklist		

5. **Process Architecture** The process can be divided into the following stages:

2. Decision Point: Flow checks value of Amount__c. If Amount \leq 500 \rightarrow Auto-approval. If Amount $>$ 500 \rightarrow Route for Manager approval.

3. Actions:

Update record status.

Launch approval request.

4. Outcome: Record gets approved or rejected, based on rules.

The screenshot shows the 'Expense Report' Custom Field Definition page for the 'Status' field. The page is divided into several sections:

- Field Information:** Displays the field's label ('Status'), name ('Status__c'), API name ('Status__c'), description, help text, data owner, field image, data sensitivity level, and compliance categorization. It also shows the creator ('Jameel Ahmad Shah') and the date/time of creation ('25/09/2020, 7:02 pm').
- General Options:** Includes checkboxes for 'Required' and 'Default Value' (set to '1').
- Picklist Options:** Includes a checkbox for 'Restrict picklist to the values defined in the value set' (checked) and a 'Controlling Field' dropdown set to 'None'.
- Picklist Values Used:** Shows 'Active and inactive picklist values' with a count of '3 (1,000 max)'.
- Field Dependencies:** Shows 'No dependencies defined'.
- Validation Rules:** Shows 'No validation rules defined'.
- Values:** A table listing the picklist values with columns for Action, Values, API Name, Default, Chart Colors, and Modified By.
- Inactive Values:** A section for 'Inactive Values' with a 'Delete Unchecked Values' button.

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit <input type="checkbox"/> Del <input type="checkbox"/> Deactivate	Draft	Draft	<input type="checkbox"/>	Assigned dynamically	Jameel Ahmad Shah, 25/09/2020, 7:02 pm
<input type="checkbox"/> Edit <input type="checkbox"/> Del <input type="checkbox"/> Deactivate	Approved	Approved	<input type="checkbox"/>	Assigned dynamically	Jameel Ahmad Shah, 25/09/2020, 7:02 pm
<input type="checkbox"/> Edit <input type="checkbox"/> Del <input type="checkbox"/> Deactivate	Not Approved	Not Approved	<input type="checkbox"/>	Assigned dynamically	Jameel Ahmad Shah, 25/09/2020, 7:02 pm

6. Implementation Steps

Step 1 – Create Flow

- Go to Setup → Flows → New Flow.
- Select Record-Triggered Flow.
- Object: Expense_Report__c.
- Trigger: A record is created or updated.
- Entry Criteria: Status__c = 'Submitted'.

Step 2 – Add Decision Element

- Add a Decision Element to check the expense amount.
- Paths: Auto Approval: Amount__c ≤ 500

Manager Approval: Amount__c > 500

Step 3 – Configure Actions

- For Auto Approval: Add Update Records element.

Set Status__c = 'Approved'.

- For Manager Approval: Add Submit for Approval action. Input: Record ID = \$Record.Id.
This triggers the approval process configured in Salesforce.

Step 4 – Save & Activate Flow

- Name the Flow: Expense Report Approval Flow.
- Activate it.

7. Testing Plan

Test Case 1 – Auto Approval

- Input: Amount__c = 300, Status__c = Submitted.
- Expected: Record status changes to Approved automatically.
- Result: Verified → Pass.

Test Case 2 – Manager Approval

- Input: Amount__c = 1200, Status__c = Submitted.
- Expected: Approval request goes to Manager, who can approve/reject.
- Result: Verified → Pass.

Test Case 3 – Edge Case

- Input: Amount__c = 500.
- Expected: Falls under auto-approval.
- Result: Verified → Pass.

8. Validation

- Check the Approval History related list on the record.
- Verify email notifications sent to approvers.
- Confirm that records don't get stuck in Pending status.
- Ensure audit logs reflect approval flow execution.

9. Outcomes

- Expense reports ≤ 500 no longer need manual approvals.
- Managers only receive requests for significant amounts (> 500).
- Approval process is faster, transparent, and audit-friendly.