**ExpenseFlow: Expense Request and Approval Automator**

**Problem Statement**

A growing organization needs to replace its inefficient, manual expense approval process with a secure and scalable solution built on Salesforce. The current reliance on spreadsheets, paper receipts, and manual email chains causes delays, errors, and compliance risks. The system must centralize expense data, automate approval routing based on business rules, provide transparency across departments, and deliver a modern interface for employees, managers, and finance teams to improve efficiency and ensure financial control.

**Phase 1: Problem Understanding & Industry Analysis**

**Requirements Gathering**

* Tracking every stage of an expense request, from initial submission to final approval/rejection.
* Automatic routing of requests to the employee’s manager and finance team based on configurable thresholds.
* Automated notifications to employees and approvers at key stages (submission, approval, rejection).
* Secure storage of all expense data, including request details, line items, and approval history.
* Role-based access control so users can only see and act on data relevant to their role.
* Support for comments/justifications, especially for rejected requests.
* Dashboards and reports to give managers and finance teams insights into spending patterns, approval times, and compliance.

**Stakeholder Analysis**

* **Employees:** Primary users who need a simple way to submit expense requests with clear visibility into approval status.
* **Managers:** Approvers who require automated routing of requests, easy review interfaces, and real-time notifications.
* **Finance Teams:** Responsible for oversight, ensuring compliance, and analyzing expense trends. They need detailed reports and dashboards.
* **Administrators:** Builders and maintainers of the system. They require scalable automation, configurable workflows, and robust security.

**Business Process Mapping**

* Automated routing of expense requests to the appropriate manager/finance team.
* Email/notification triggers for submission, approval, and rejection.
* Locking of records upon submission to prevent unauthorized edits.
* Requirement of rejection comments to ensure accountability.
* Status updates (Draft → Submitted → Approved/Rejected) tracked automatically.
* Dashboards showing pending approvals, average approval time, and expense breakdowns.

**Industry-Specific Use Case Analysis**

* **Expense Management:** Centralize all expense requests, items, and approvals for compliance and transparency.
* **Approval Workflow Automation:** Reduce delays by automating routing, status changes, and notifications.
* **Threshold-Based Approvals:** Ensure high-value expenses are escalated to finance for additional oversight.
* **Audit & Compliance:** Maintain a complete approval history for financial audits and policy enforcement.
* **Mobile-First Access:** Allow employees and managers to submit and approve expenses on the go.
* **Reporting & Dashboards:** Provide finance with detailed insights into expense categories, spending limits, and trends.

**AppExchange Exploration**

* **Approval Process Enhancers:** Prebuilt components to extend Salesforce approval capabilities.
* **Document Management Apps:** For attaching receipts and supporting files securely.
* **Analytics & Dashboard Apps:** Advanced visualization tools for finance and leadership teams.
* **Notification/Reminder Apps:** To improve SLA compliance in approvals.