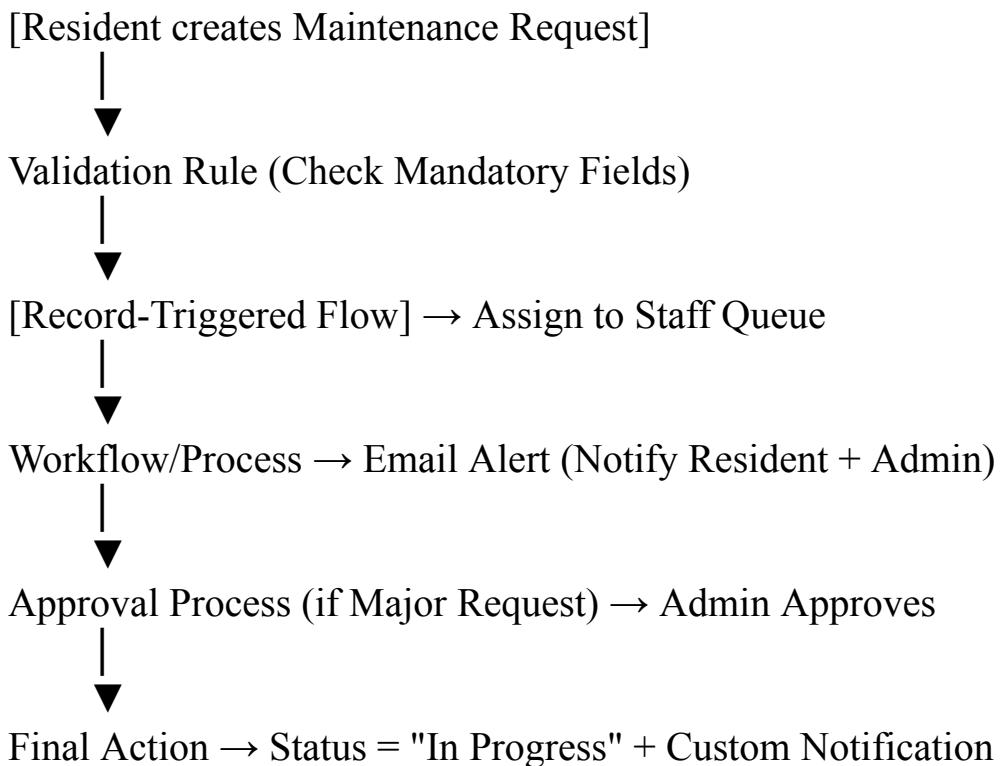


Phase 4: Process Automation (Admin):

Flow Chart Example:



1. Validation Rules: Ensure data integrity by enforcing conditions. Setup → Object Manager → Flat.

Fields & Relationships → Validation Rules → New.

Rule Name: MaxResidents

Formula: `Resident_Count__c > 3`

Error Message: “A flat cannot have more than 3 residents.”

Save & Activate.

The screenshot shows the Salesforce Validation Rules setup screen. At the top, there is a search bar labeled "Search Setup". Below the search bar, the "Object Manager" tab is selected. On the left sidebar, there are several navigation items: "Relationships", "Layouts", "Record Pages", "Links, and Actions", "Object Layouts", "Sets", "Limits", and "Types". The main content area is titled "Validation Rules" and contains a "New" button. The configuration fields are as follows:

- Rule Name:** MaxResidents
- Description:** Prevent assigning more than 3 residents to a Flat.
- Formula:** Resident_Count__c > 3
- Error Message:** A flat cannot have more than 3 residents.

At the bottom of the configuration form, there is a radio button group with two options: "Field" (which is selected) and "Top of Page".

2. Workflow Rules (Classic Automation):

Setup → Workflow Rules → New Rule.

Select Object: Case (Maintenance Request).

Rule Criteria: Status = 'Emergency'.

Workflow Action → New Email Alert → choose Admin email template.

Activate Rule.

New Workflow Rule

Select Object: Case

Rule Name: Emergency Notification

Rule Criteria: Run this rule if the case:

created

Rule Criteria: Status: Emergency

Save **Cancel**

3.Process Builder:

Setup → Process Builder → New.

Process Name: Update Resident Count.

Object: Contact.

Start the process: When record is created.

Criteria: Always True.

Action: Update Records → Account.Total_Residents__c = COUNT(Contacts).

Activate Process.

New Process

Process Name
Update Resident Count

API Name
Update_Resident_Count

The process starts when
 A record changes

Object
Contact

Start the process
 Yes

Choose the actions and logic to execute
+ Add Object

Save **Cancel**

4.Approval Process:

Setup → Approval Processes → Select Object = Event.
Create New Approval Process → Standard Setup Wizard.
Entry Criteria: Event.Status = “Pending Approval”.
Approver: Role = Admin.
Final Action: Update Event.Status = “Approved”. Save & Activate.

New Approval Process

Object

Event

Approval Process Name

Approve Community Event

Entry Criteria

Event.Status equals Pending Approval

Approver

Role

Final Approval Actions

Event.Status equals Approved

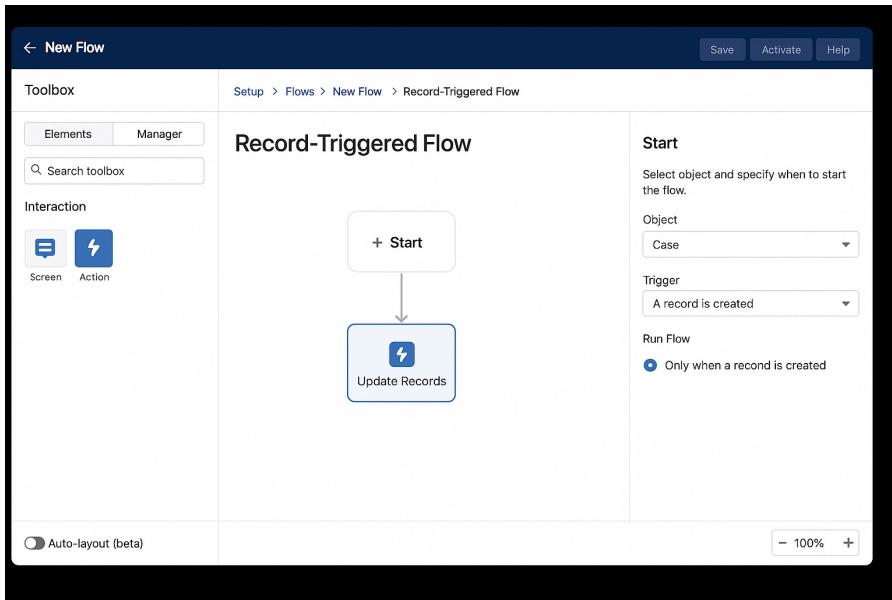
Save

Activate

5. Flow Builder (Modern automation tool replacing Workflow + Process Builder):

(Record-Triggered Flow for Maintenance Request):

1. Setup → Flows → New Flow → Record-Triggered Flow.
2. Object: Case (Maintenance Request).
3. Trigger: On Create.
4. Criteria: Case.Type = ‘Maintenance’.
5. Action: Update Case.Owner = Staff Queue. Save → Activate.



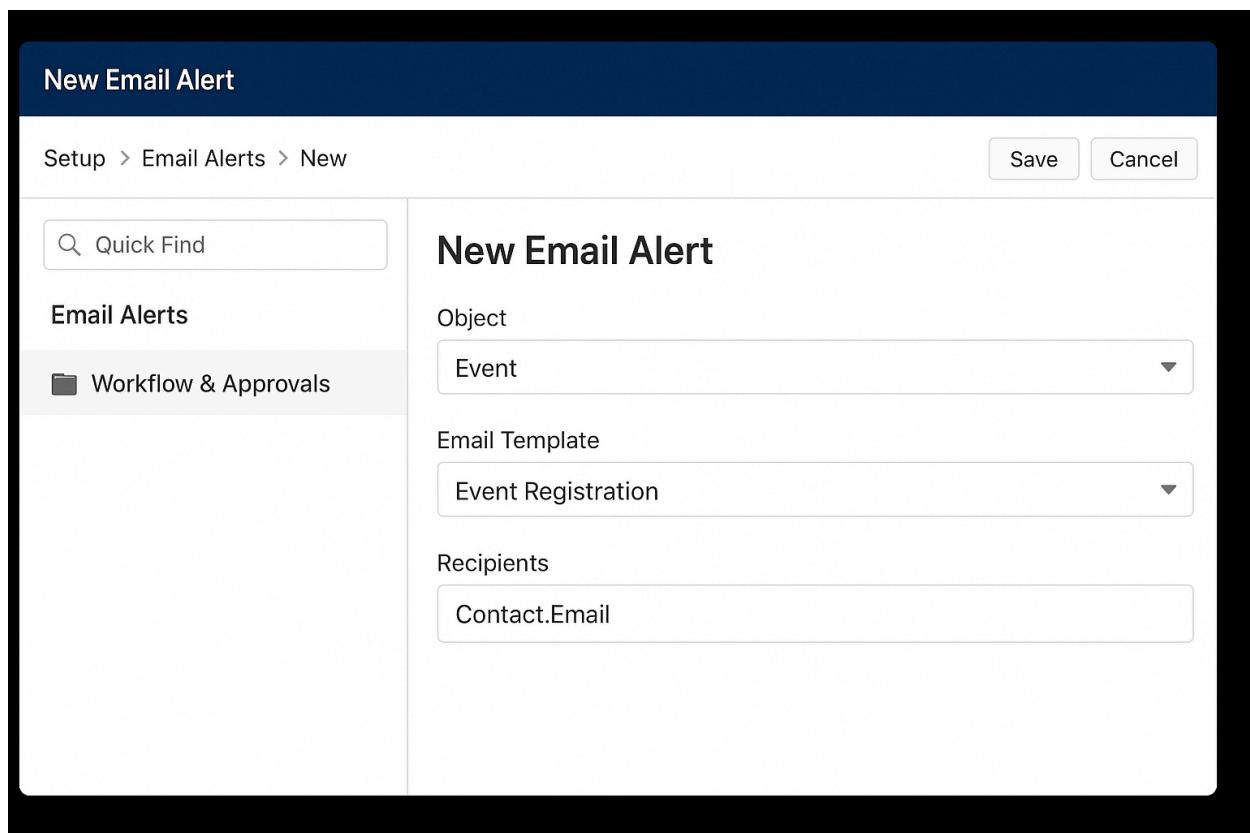
6. Email Alerts:

Triggered by Workflow, Process Builder, or Flow.

Steps: Setup → Email Alerts → New → Select Object = EventTemplate = Event Registration → Recipient = Contact.Email.

7. Field Updates:

Steps: Workflow Action → Field Update → Case.Resolution_Date__c = TODAY().



8. Tasks:

Steps: Workflow Action → New Task → Assign to Admin Role → Subject = “Review Notice”.

9. Custom Notifications:

Steps: Setup → Notification Builder → Custom Notifications → New

Name: Emergency Alert → Add to Process Builder/Flow → Action = “Send Custom Notification”.