

Phase 4: Automation & Logic

1 Validation Rules

Purpose: Stop invalid data (prevent save if condition fails).

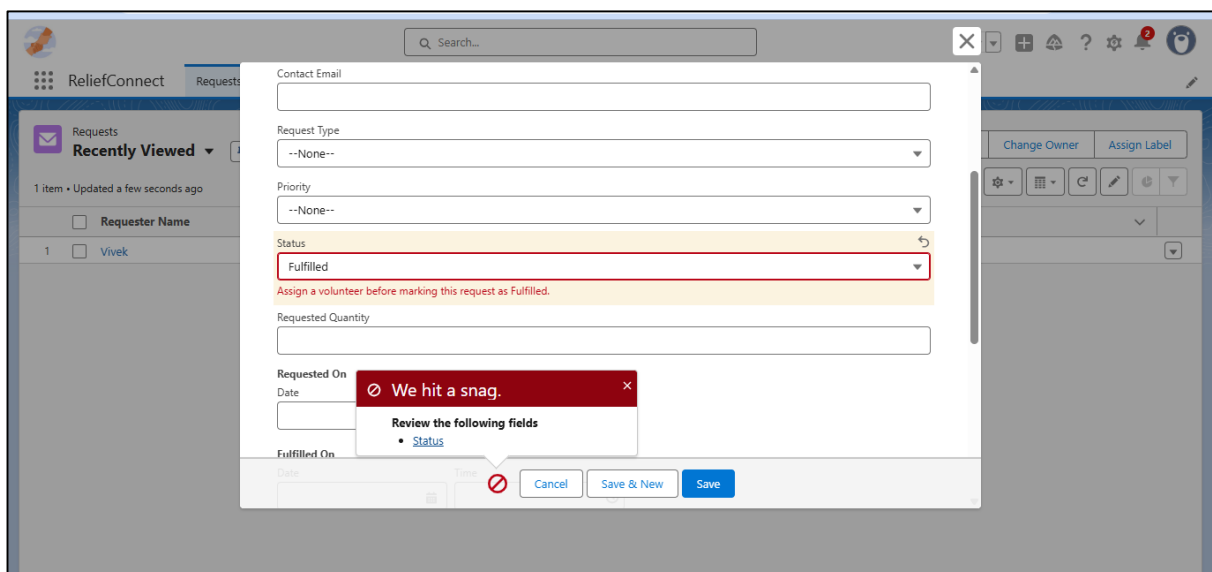
Example rule: A request cannot be marked **Fulfilled** unless an assigned volunteer exists.

Steps

1. Setup → Quick Find → **Object Manager** → Request → **Validation Rules** → **New**.
2. Fill:
 - **Rule Name:** VR_Request_Fulfilled_Assigned
 - **Error Condition Formula:**
AND(
 ISPICKVAL(Status__c, "Fulfilled"),
 ISBLANK(Assigned_Volunteer__c)
)
 - **Error Message:** Assign a volunteer before marking this request as Fulfilled.
 - **Error Location:** Field → Status.
3. Save & Activate.

Test

- Open a Request → set Status = Fulfilled without Assigned Volunteer → Save → you should see the error.
- Assign a Volunteer → set Status = Fulfilled → Save succeeds.



2 Email Alerts (used by Workflow/Flow)

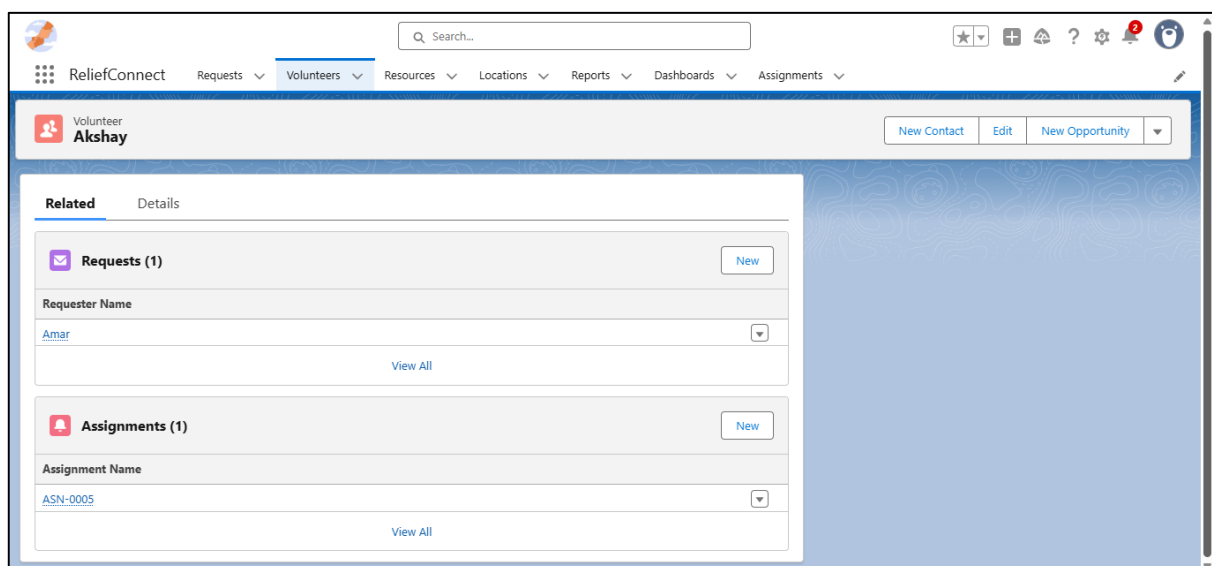
Purpose: send templated emails to users on events.

Steps

1. Create an Email Template:
 - Setup → Quick Find → **Email Templates** → **New Email Template (Lightning)**.
 - Name: ET_Request_Assigned
 - Subject: You have been assigned to Request {!Request__c.Name}
 - Body: include merge fields like {!Request__c.Requester_Name__c}, {!Request__c.Location__c}.
 - Save.
2. Create Email Alert (used by Workflow/Flow):
 - Setup → Quick Find → **Email Alerts** → **New Email Alert**.
 - Label: EA_Request_Assigned
 - Object: Assignment (or Request if you prefer)
 - Email Template: ET_Request_Assigned
 - Recipient Type: User/Email Field → Volunteer__c Save.

Test

- Create an Assignment (or update Request to Assigned) that triggers the Email Alert.
- Check the recipient inbox (or ActivityHistory Email record) in Salesforce for the sent message.



3 Process Builder

Purpose: if/then branching on object events (use Flow instead, but here's how).

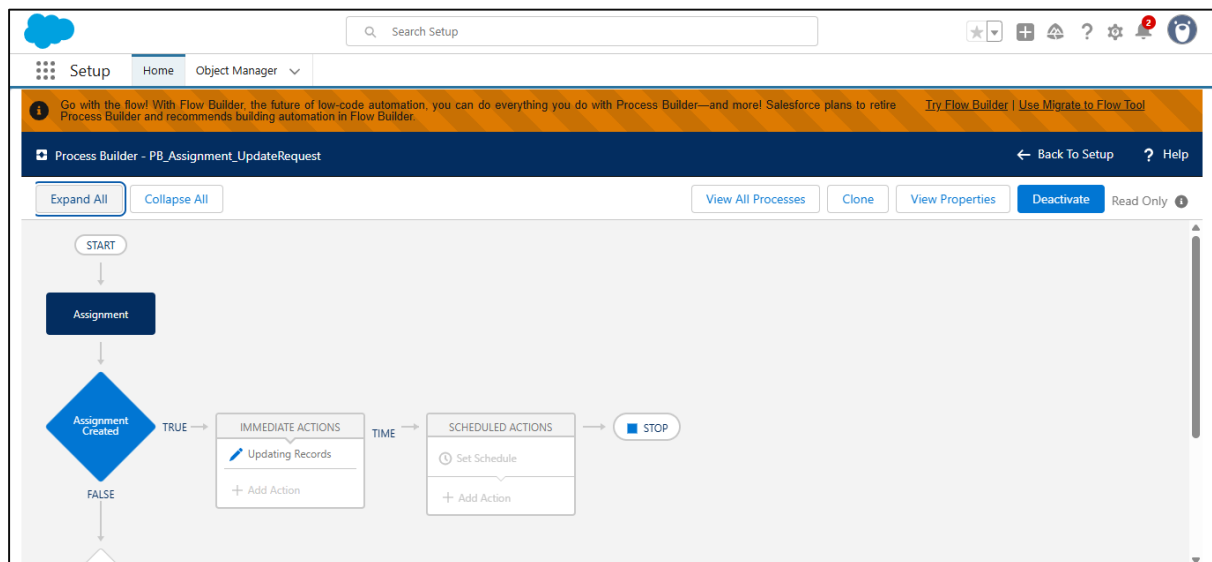
Example: When Assignment created → update Request Status to In Progress.

Steps

1. Setup → Quick Find → **Process Builder** → New.
 - Name: PB_Assignment_UpdateRequest.
2. Add Object: Assignment → start the process when a record is created.
3. Add Criteria Node:
 - Criteria Name: Always (or Assignment Created) → no conditions or Status = Assigned.
4. Immediate Actions:
 - Action Type: **Update Records** → select the associated Request record ([Assignment].Request__c) → set Status__c = In Progress.
5. Activate.

Test

- Create an Assignment linked to a Request → the Request's status should be updated.



4 Workflow Rules

Steps:

1. Setup → **Workflow Rules** → New Rule.
2. Object: **Request__c**.
3. Rule Name: **WR_Set_Fulfilled_Date**.
4. Rule Criteria: **Status__c Equals Fulfilled**.
5. Action: **New Field Update**.
 - Name: **FU_Set_Fulfilled_Date**.
 - Field to Update: **Fulfilled_On__c**.
 - Formula: **NOW ()**
6. Save → Activate Workflow.

Test:

- Open a Request record.
- Change Status = Fulfilled → Save.
- Check that Fulfilled_On__c is now set.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'workflow' entered and a list of navigation items: Process Automation, Workflow Actions (with sub-items Email Alerts, Field Updates, Outbound Messages, Send Actions, and Tasks), and Workflow Rules. The main content area is titled 'Workflow Rules' and displays details for a specific rule named 'WR_Set_Fulfilled_Date'. The rule is active and configured for the 'Request' object. The evaluation criteria is 'Request: Status EQUALS Fulfilled'. The rule was created by 'Akshay Ingole' on 9/23/2025 at 12:36 PM. Below the rule details, there is a section for 'Workflow Actions' with an 'Edit' button, and a table for 'Immediate Workflow Actions' with columns for 'Type' and 'Description'.

Setup

Search Setup

Workflow Rules

Workflow Rule: WR_Set_Fulfilled_Date

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail

Rule Name	WR_Set_Fulfilled_Date	Object	Request
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	Request: Status EQUALS Fulfilled		
Rule Criteria	Request: Status EQUALS Fulfilled		
Created By	Akshay Ingole, 9/23/2025, 12:36 PM	Modified By	Akshay Ingole, 9/23/2025, 12:46 PM

Workflow Actions

Immediate Workflow Actions

Type	Description
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5 Approval Process: High Quantity Request

- Navigate: Setup → Quick Find → Approval Processes
- Object: Request__c
- Create Process: Jump Start Wizard
- Basic Info: Name = High Quantity Request Approval
- Entry Criteria: Requested_Quantity__c > 500
- Assign Approver: Automatically → Relief Head
- Initial Submission: Status__c = Pending Approval
- Final Approval: Status__c = Approved
- Final Rejection: Status__c = Rejected
- Activate: Save & Activate

The screenshot displays the Salesforce Setup interface for configuring an Approval Process. The left sidebar shows the navigation menu with 'Approval Processes' selected under 'Process Automation'. The main content area shows the configuration for the 'High Quantity Request Approval' process. The process is active and has a unique name of 'High_Quantity_Request_Approval'. The entry criteria is 'Request: Requested Quantity GREATER THAN 500'. The record editability is set to 'Administrator ONLY'. The initial submission actions include a 'Record Lock' action.

Action	Type	Description
Record Lock		Lock the record from being edited

Notify Volunteer Flow

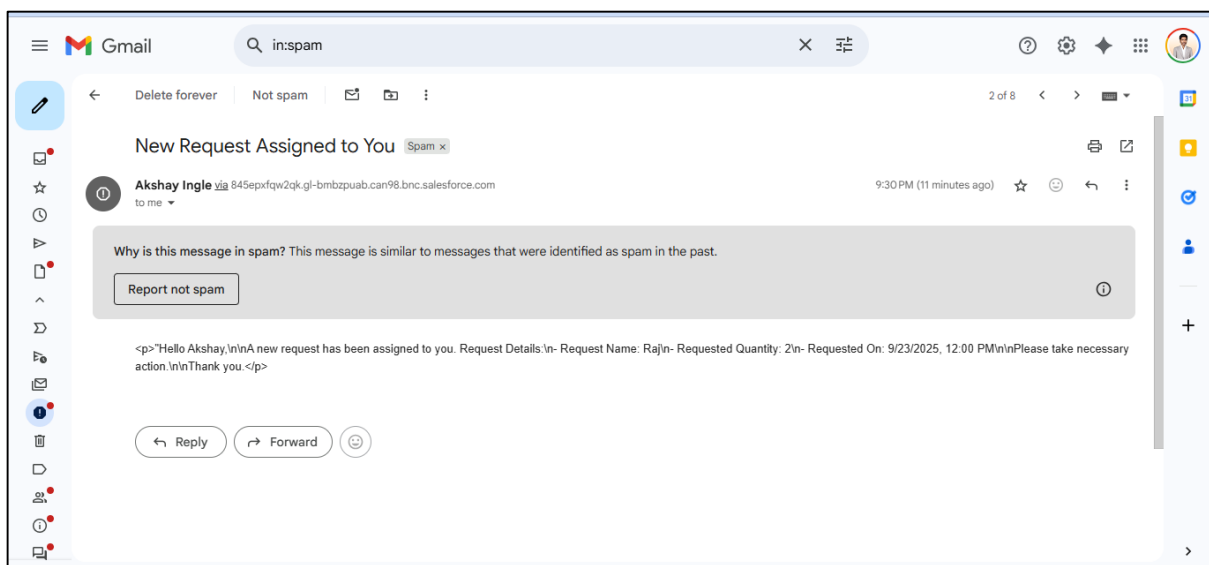
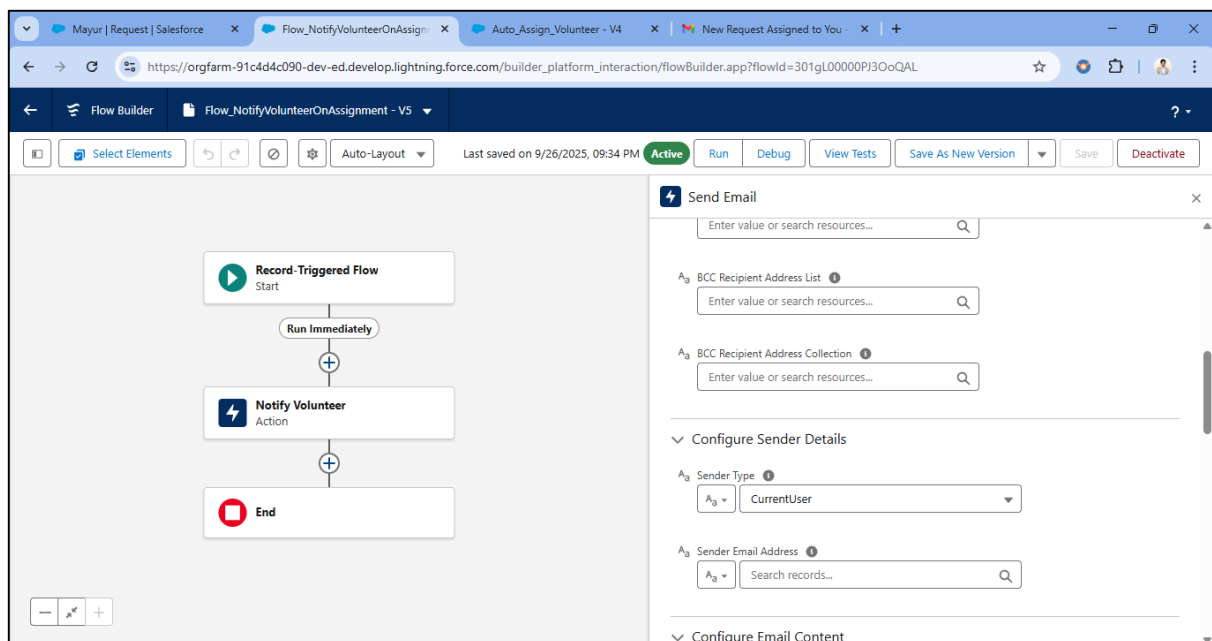
Step 1: Create Flow

- **Type:** Record-Triggered Flow
- **Object:** Request__c
- **Trigger:** On record update
- **Condition:** Assigned_Volunteer__c Is Null = False
- **Optimize:** Actions and Related Records

Step 2: Add Email Action

- **Action:** Email Alert (or Send Email)
- **Template:** "New Request Assigned to You"
- **Body:** "Hello {!Assigned_Volunteer__c.Name}, you are assigned to Request {!Request__c.Name}."
- **Recipient:** {!\$Record.Assigned_Volunteer__r.Email__c}

Step 3: Save & Activate



Auto Assign Volunteer Flow

- Flow Trigger
 - Flow Name: Flow_AutoAssignVolunteer
 - Object: Request__c
 - Trigger: When a record is created or updated
- Get Records Element
 - Element Label: Get Available Volunteer
 - Object: Volunteer__c
 - Filter Criteria: Availability__c Equals Available
- Decision Element
 - Condition: {!Get_Available_Volunteer.Id} Is Null = False
 - Paths:
 - Yes: Update Records
 - Default: Do nothing
- Update Records Element
 - Record to Update: Record that triggered the flow
 - Field to Update: Assigned_Volunteer__c
 - Value: {!Get_Available_Volunteer.Id}

