

Phase 4: Process Automation – Account (Customer) Project

Tools Used: Validation Rules, Roll-Up Summary Fields, Record-Triggered Flow, Before-Save Flow, Approval Process, Reports & Dashboards.

1. Validation Rules (Data Quality)

Purpose: Prevent incorrect or inconsistent records.

Object	Rule Name	Formula	Error Message
Account (Customer)	AccountNameRequired	ISBLANK(Name)	“Customer Name is required.”
Account (Customer)	CustomerEmailRequired	ISBLANK(Email__c)	“Customer Email is required.”

2. Roll-Up Summary Fields

Purpose: Automatically summarize related records.

Object	Roll-Up Field	Summary Type	Related Object
Customer (Account)	Total_Sales_Orders__c	COUNT	Sales Order

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is: SETUP > OBJECT MANAGER > Account. The left sidebar contains a list of setup options: Details, Fields & Relationships (selected), 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, Hierarchy Columns, and Scoping Rules. The main content area is titled 'Account Custom Field Total Purchase Orders' with a 'Back to Account Fields' link. Below the title are tabs: 'Custom Field Definition Detail' (selected), 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab shows the following information:

Field Information	
Field Label	Total Purchase Orders
Field Name	Total_Purchase_Orders
API Name	Total_Purchase_Orders__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Alekhyia Nam
Created Date	9/28/2025, 11:12 PM
Modified By	Alekhyia Nam
Modified Date	9/28/2025, 11:12 PM

Below the field information is the 'Roll-Up Summary Options' section:

Data Type	Roll-Up Summary
Summarized Object	Purchase Order
Filter Criteria	
Summary Type	COUNT

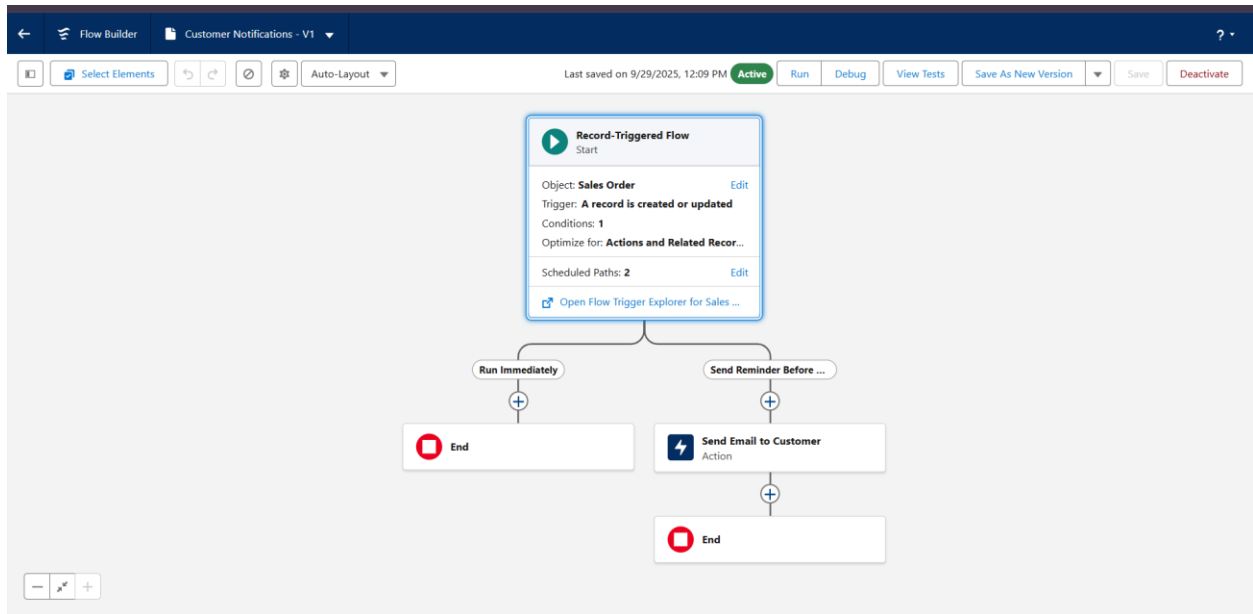
3. Record-Triggered Flow

Purpose: Automate notifications or updates based on record changes.

Example: Sales Order Customer Notification

- Object: Sales Order
- Trigger: When record is created

- Entry Criteria: Status = Approved
- Action: Send email notification to linked Customer

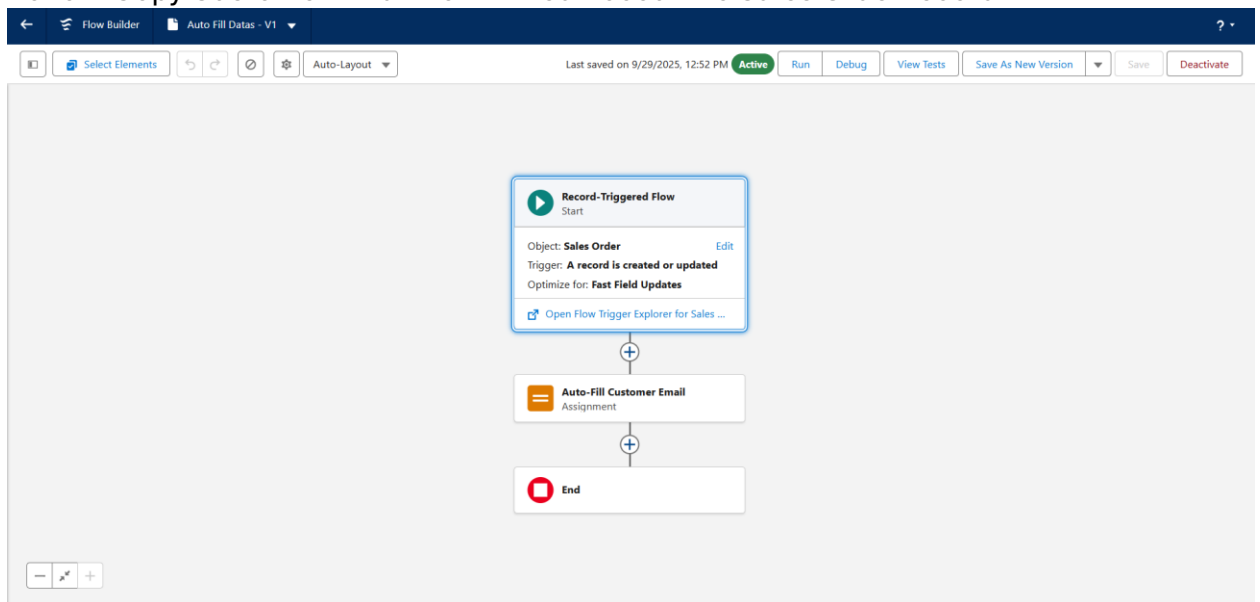


4. Before-Save Flow

Purpose: Automatically populate fields before saving a record.

Example: Auto-fill Customer Email on Sales Order

- Object: Sales Order
- Trigger: Before Save
- Action: Copy Customer Email from linked Account to Sales Order record



5. Approval Process

Purpose: Ensure managerial approval for high-value Sales Orders.

Example: High-Value Sales Order Approval

- Object: Sales Order
- Entry Criteria: Total Sales Orders > 50000
- Approver: Sales Manager
- Actions:
 - Approval → Status = Approved
 - Rejection → Status = Pending

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links for Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), Apex Exception Email, Authorized Email Domains, and Classic Email Templates. The main content area is titled 'Approval Processes' and shows the configuration for 'Sales Order: High Value Sales Order Approval'. The 'Process Definition Detail' section includes fields for Process Name, Unique Name, Description, Entry Criteria, Record Editability, Approval Assignment Email Template, Initial Submitters, and Created By. The 'Initial Submission Actions' section shows a table with one action: 'Record Lock'. The 'Approval Steps' section shows a table with one step: 'ALEKHYA NAM'.

Process Name	High Value Sales Order Approval	Active	<input type="checkbox"/>
Unique Name	High_Value_Sales_Order_Approval	Next Automated Approver Determined By	Manager of Record Submitter
Description			
Entry Criteria	Account: Total Sales Orders GREATER THAN: 50000		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	Appointment for Unauthenticated User using Appointment Types - For Amazon Chime		
Initial Submitters	Account Owner	Modified By	Alekhyia Nam, 9/29/2025, 1:00 AM
Created By	Alekhyia Nam, 9/29/2025, 12:59 AM		

Action	Type	Description
Record Lock		Lock the record from being edited

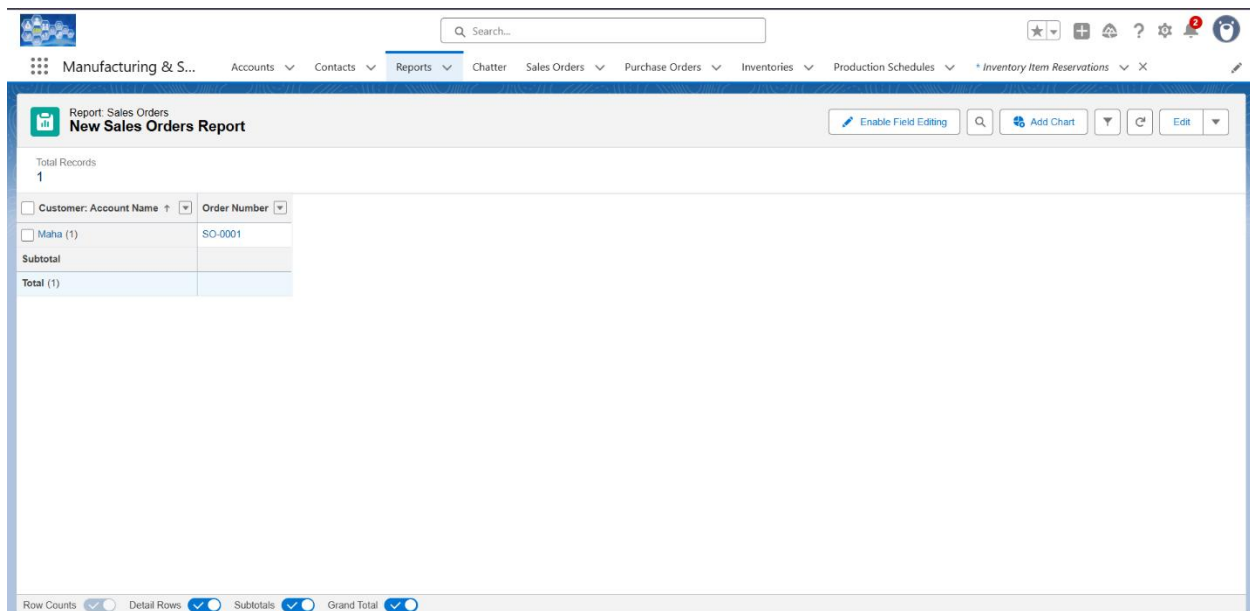
Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	ALEKHYA NAM			Manager	Final Rejection

6. Reports & Dashboards

Purpose: Provide live insights to admins and managers.

Reports:

- Sales Orders by Customer
 - Report Type: Sales Orders (or Accounts with Sales Orders)
 - Group by: Account (Customer)
 - Filter: All Sales Orders
- Customers with No Sales Orders
 - Report Type: Accounts
 - Filter: Total Sales Orders = 0
- Pending Sales Orders for Approval
 - Report Type: Sales Orders
 - Filter: Status = Pending Approval



Dashboard: Customer Sales Orders Overview

Components: - Bar Chart: Total Sales Orders per Customer - Table: Customers with Pending Orders - Number Widget: Total Sales Orders This Month

