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

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
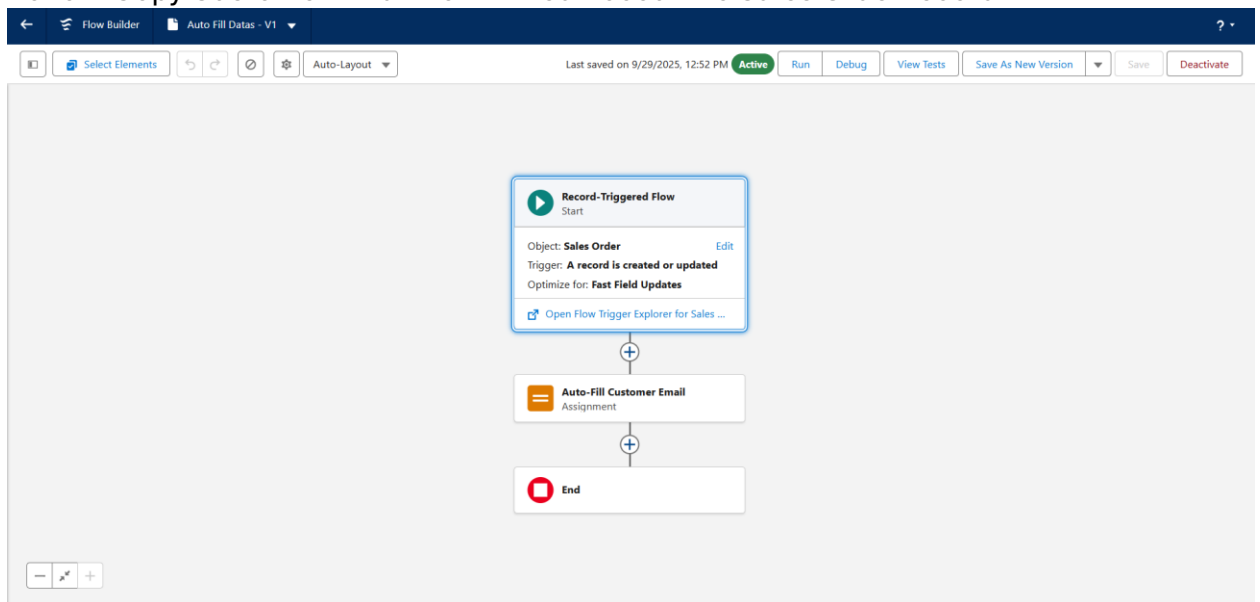- Action: Send email notification to linked Customer
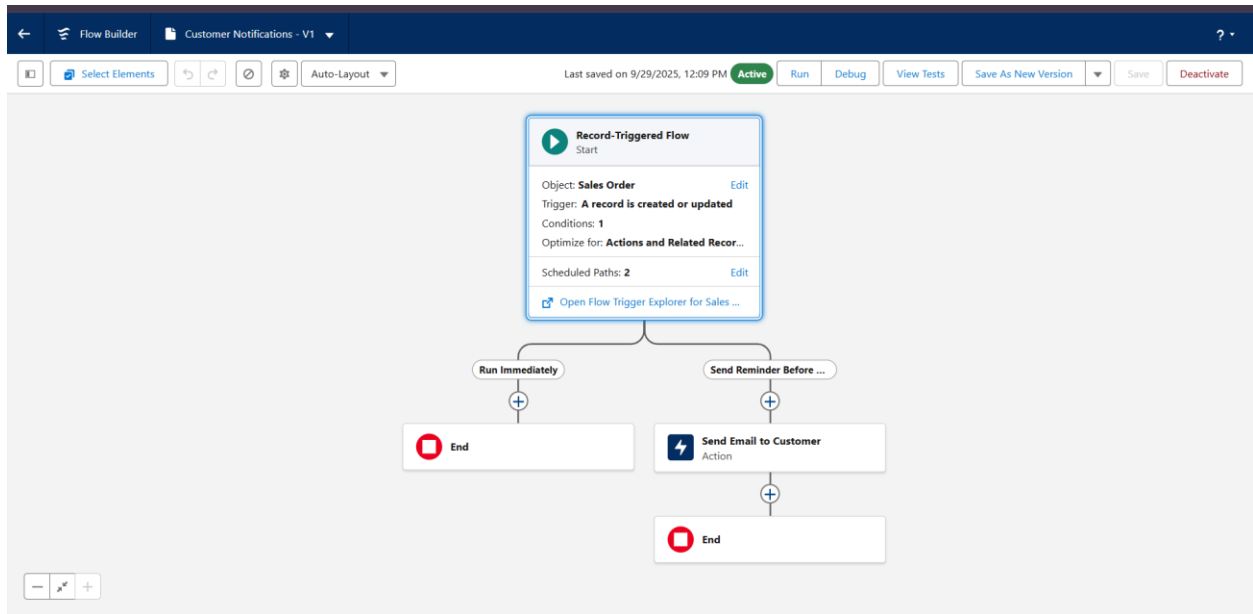
4. Before-Save Flow

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

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
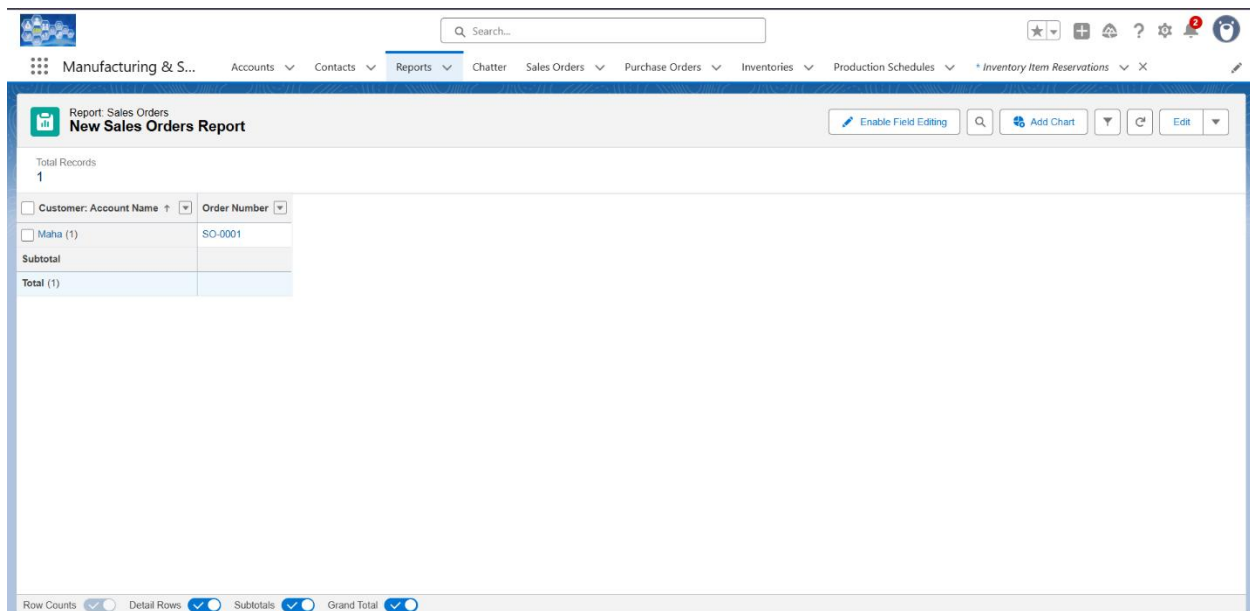
Dashboard: Customer Sales Orders Overview

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