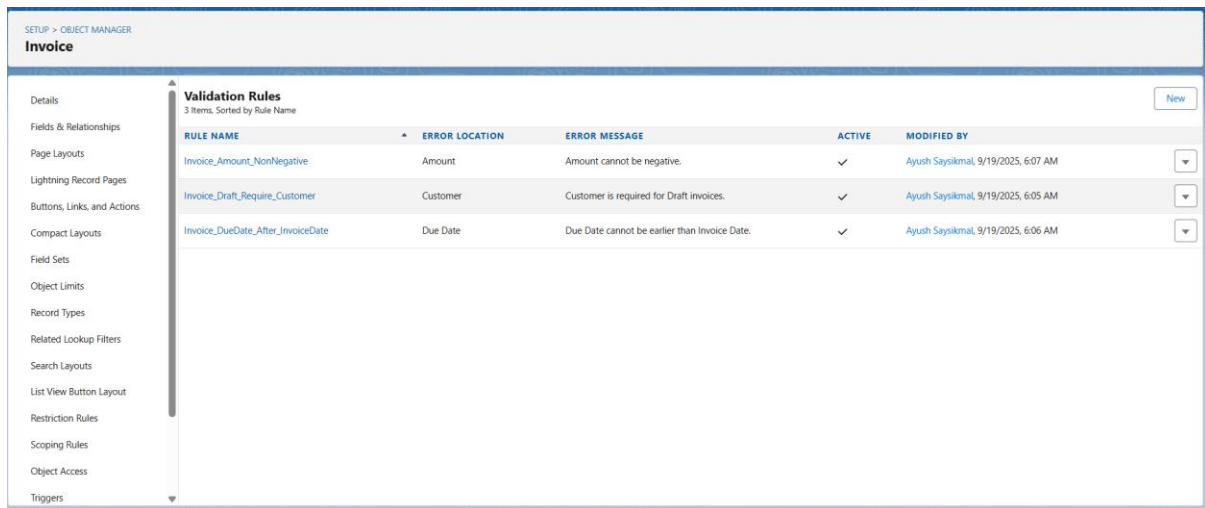


Phase 4 — Process Automation

1. Validation Rules

Setup → Object Manager → Invoice → Validation Rules → New

- Invoice_Draft_Require_Customer
- Invoice_DueDate_After_InvoiceDate
- Invoice_Amount_NonNegative



SETUP > OBJECT MANAGER

Invoice

Details

Fields & Relationships

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

Restriction Rules

Scoping Rules

Object Access

Triggers

Validation Rules

3 Items, Sorted by Rule Name

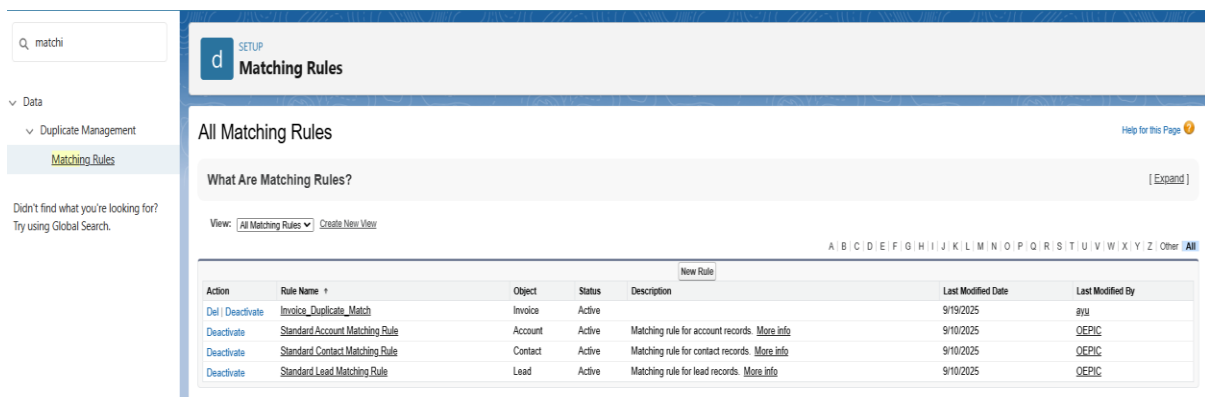
[New](#)

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Invoice_Amount_NonNegative	Amount	Amount cannot be negative.	✓	Ayush Saysikmal , 9/19/2025, 6:07 AM
Invoice_Draft_Require_Customer	Customer	Customer is required for Draft Invoices.	✓	Ayush Saysikmal , 9/19/2025, 6:05 AM
Invoice_DueDate_After_InvoiceDate	Due Date	Due Date cannot be earlier than Invoice Date.	✓	Ayush Saysikmal , 9/19/2025, 6:06 AM

2. Duplicate Prevention

Setup → Duplicate Management → Matching Rules → New

- Invoice_Duplicate_Match



Q matchi

▼ Data

▼ Duplicate Management

[Matching Rules](#)

Didn't find what you're looking for?
Try using Global Search.

Matching Rules

All Matching Rules [Help for this Page](#)

What Are Matching Rules? [\[Expand \]](#)

View: [All Matching Rules](#) [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other [All](#)

Action	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By
Del Deactivate	Invoice_Duplicate_Match	Invoice	Active		9/19/2025	ayy
Deactivate	Standard Account Matching Rule	Account	Active	Matching rule for account records. More info	9/10/2025	CEPIC
Deactivate	Standard Contact Matching Rule	Contact	Active	Matching rule for contact records. More info	9/10/2025	CEPIC
Deactivate	Standard Lead Matching Rule	Lead	Active	Matching rule for lead records. More info	9/10/2025	CEPIC

Setup → Duplicate Management → Duplicate Rules → New

- Block_Duplicate_Invoice

Setup

Home

Object Manager

Q dupl

Data

Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

Didn't find what you're looking for?
Try using Global Search.

SETUP

Duplicate Rules

What Are Duplicate Rules?

[Expand]

View: All Duplicate Rules

New Rule

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Block_Duplicate_Invoice		Invoice	Invoice_Duplicate_Match	✓	my	9/19/2025
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	DEPIC	9/10/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Contact Matching Rule Standard Lead Matching Rule	✓	DEPIC	9/10/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Contact Matching Rule Standard Lead Matching Rule	✓	DEPIC	9/10/2025

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

3. Email Templates & Alerts

Setup → Email Templates → New → Email Template

- Invoice_Overdue_Alert
- Invoice_Reminder_Notification

Setup

Home

Object Manager

Q Search Setup

Email

Classic Email Templates

Lightning Email Templates

Didn't find what you're looking for?
Try using Global Search.

SETUP

Classic Email Templates

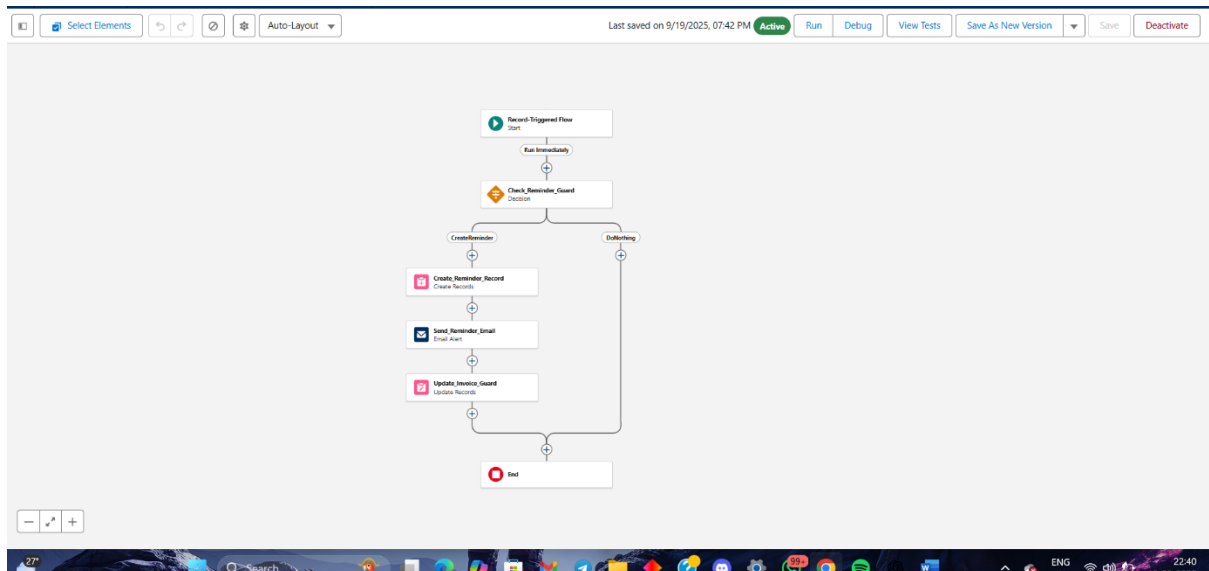
Edit Del	Appointment for Unauthenticated User using Appointment Types - For Amazon China.	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with Amazon China.	sfkadm	9/10/2025
Edit Del	Appointment for Unauthenticated User using Appointment Types - For third party.	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with third party video applications.	sfkadm	9/10/2025
Edit Del	Appointment for Unauthenticated User using Engagement Channels-For Amazon China.	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with Amazon China.	sfkadm	9/10/2025
Edit Del	Appointment for Unauthenticated User using Engagement Channels-For third party.	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with third party video applications.	sfkadm	9/10/2025
Edit Del	Canceled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm canceling of a service appointment.	sfkadm	9/10/2025
Edit Del	Commerce Reorder Portal - Invitation	Custom	✓	Invite a contact to a Commerce Reorder Portal.	autopro	9/10/2025
Edit Del	Group Service Appointments Enrollment Confirmation Email	Custom	✓	Email Template to confirm enrollment of an attendee to a Group service appointment.	sfkadm	9/10/2025
Edit Del	Invoice Approval Request	Text	✓		my	9/19/2025
Edit Del	Invoice Overdue Alert	Text	✓		my	9/19/2025
Edit Del	Invoice Reminder Notification	Text	✓		my	9/19/2025
Edit Del	Marketing Product Inquiry Response	Text	✓	Standard email response to website product inquiries	DEPIC	9/10/2025
Edit Del	Rescheduled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm rescheduling of a service appointment.	sfkadm	9/10/2025
Edit Del	Sales New Customer Email	Text	✓	Email to new customers	DEPIC	9/10/2025
Edit Del	Scheduled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm scheduling of a service appointment.	sfkadm	9/10/2025
Edit Del	Scheduler Payments: Payment Reminder for Service Appointment Email	Custom	✓	Email Template to remind customers to pay for their service appointment.	sfkadm	9/10/2025
Edit Del	Scheduler Payments: Service Appointment Cancellation Email	Custom	✓	Email Template to confirm the cancellation of a paid service appointment.	sfkadm	9/10/2025
Edit Del	Scheduler Payments: Service Appointment Confirmation Email	Custom		Email Template to confirm scheduling of a paid service appointment.	sfkadm	9/10/2025

Scheduler Payments: Service Appointment Confirmation Email for Guest

4.Flows

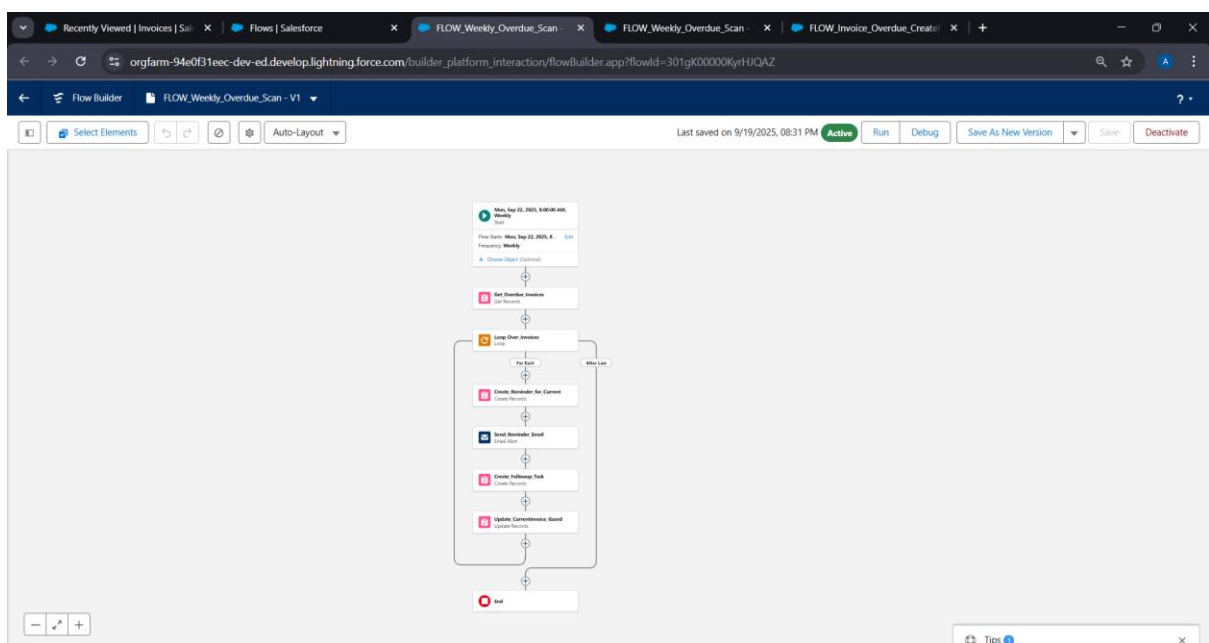
Setup → Flows → Record-Triggered Flow

- Flow invoice overdue create reminder



Setup → Flows → Schedule-Triggered Flow

- Flow weekly overdue scan



5. Approval Process

Setup → Approval Processes → Invoice → Use Standard Wizard

- Invoice cancellation approval

The screenshot shows the Salesforce Setup interface for the 'Approval Processes' section, specifically for the 'Invoice' object. The left sidebar shows the navigation menu with 'Approval Processes' selected. The main content area displays a list of approval processes for 'Invoices'. A yellow box contains a 7-step guide for creating an approval process. Below this, there is a 'Manage Approval Processes For: INVOICE' dropdown. The 'Active Approval Processes' section shows 'No approval processes available'. The 'Inactive Approval Processes' section shows one process: 'Invoice_Cancellation_Approval' with a description 'Approval required for invoices being cancelled with amount > threshold'.

Approval Processes

Invoice

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. Read the help topic
2. View the checklist
3. Create a custom user hierarchical relationship field
4. Create email templates
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: INVOICE

A listing of both active and inactive approval processes for Invoices is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

Active Approval Processes

No approval processes available

Inactive Approval Processes

Action	Approval Process Name	Description
Edit Del	Invoice_Cancellation_Approval	Approval required for invoices being cancelled with amount > threshold

6. Custom Notification

Setup → Notification Builder → Notification Types → New

- Critical overdue invoice

The screenshot shows the Salesforce Setup interface for the 'Custom Notifications' section. The left sidebar shows the navigation menu with 'Custom Notifications' selected. The main content area displays a table of custom notification types. A 'New' button is visible in the top right corner. The table has columns for 'Notification Name', 'API Name', 'Namespace', 'Desktop', and 'Mobile'. Two notification types are listed: 'Critical Overdue Invoice' and 'enablement_coaching_feedback_ready'.

Custom Notifications

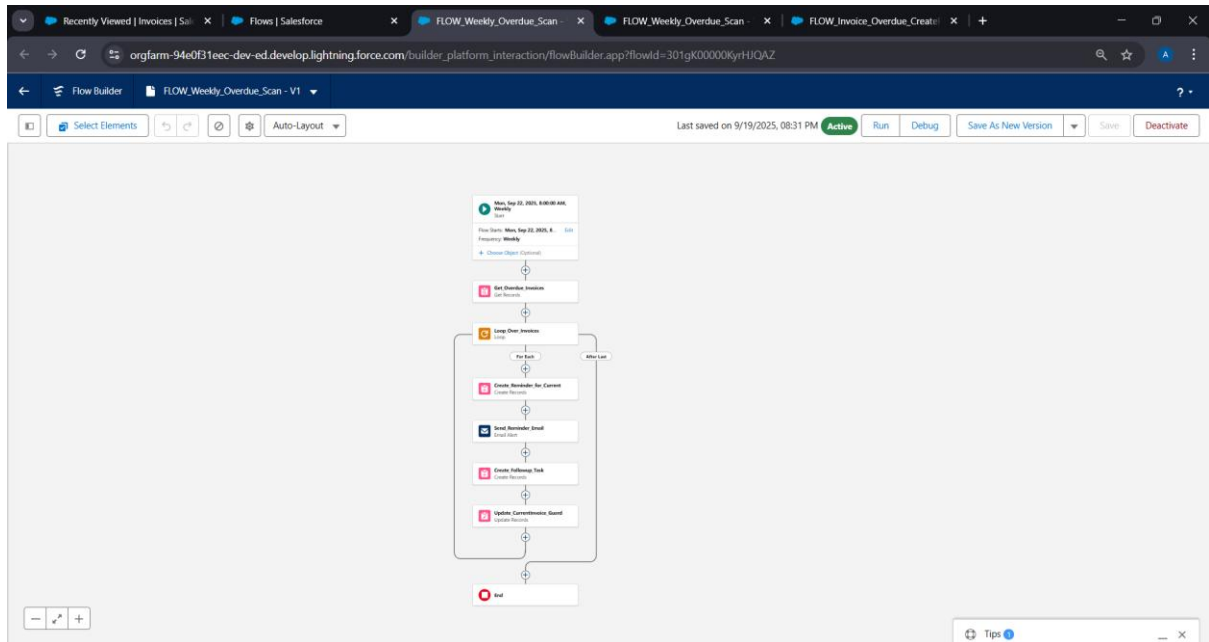
When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.

Custom Notification Types

Send custom notifications using Flows or Process Builder

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
Critical Overdue Invoice	Critical_Overdue_Invoice		✓	✓
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	✓

7. Tasks



Phase 4 completed with all process and ready to go for phase 5.