**Phase 4: Process Automation (Admin)**

In this phase, **WhatNext Vision Motos** leverages Salesforce’s automation tools to streamline operations, reduce manual effort, and deliver seamless mobility experiences. These automations ensure accuracy, faster service, and enhanced customer satisfaction.

**Validation Rules**

* Prevent incorrect data entry such as invalid *Vehicle VIN* formats or *Service Dates* in the past.
* Ensure compliance with business rules (e.g., subscription end date must be later than start date).

**Workflow Rules *(legacy)***

* Automated field updates or alerts for simple, repetitive tasks.
* Example: Automatically update *Service Request Status* to “In Progress” when assigned to a technician.

**Process Builder *(legacy)***

* Automating more complex if-then logic compared to workflows.
* Example: If a *Vehicle Warranty Expired* field = true, create a *Follow-up Task* for the sales team to propose extended warranty.

**Approval Process**

* Streamlined multi-level approvals for critical business activities.
* Example: Approval workflow for *Discount Requests* on vehicle purchases or *High-Value Service Approvals* (e.g., > ₹50,000 repair cost).

**Flow Builder *(modern automation tool)***

1. **Screen Flows** – Guided forms for service agents to log *Service Requests* or for customers to book *Test Drives*.
2. **Record-Triggered Flows** – Auto-assign *Service Requests* to technicians based on location and skill.
3. **Scheduled Flows** – Send monthly subscription renewal reminders to customers.
4. **Auto-Launched Flows** – Trigger backend processes like *creating maintenance schedules* once a new vehicle is registered.

**Email Alerts**

* Notifications for customers when their vehicle service is completed.
* Alerts for sales reps when a new lead requests a *Mobility Subscription Plan*.

**Field Updates**

* Auto-update *Service Status* to “Completed” when the final checklist task is closed.
* Automatically set *Warranty Remaining* based on purchase date.

**Tasks**

* Automatically create tasks for service engineers to perform pre-delivery inspection (PDI) for new vehicles.
* Assign follow-up tasks for sales reps after subscription expiry.

**Custom Notifications**

* Mobile and desktop push notifications for real-time updates.
* Example: Service engineer receives a push notification when a *High-Priority Breakdown Request* is logged.