

Smart E-Commerce CRM – Phase 4

Phase 4: Process Automation (Admin)

1. Validation Rules

Order__c: No future order dates.

Formula: `Order_Date__c > TODAY()`

Error: "Order date cannot be in the future."

Return_Request__c: Cannot approve return if order status ≠ Delivered.

Formula: `ISPICKVAL(Order__r.Status__c, "Delivered") = FALSE`

Error: "Return can only be requested for delivered orders."

The screenshot displays the Salesforce Setup interface, specifically the Object Manager section. It shows two validation rules: one for the Order object and one for the Return Request object. The Order validation rule is named 'No_Future_Order_Date' and the Return Request validation rule is named 'Return_Only_For_Delivered'. Both rules are active and have error messages indicating that order dates cannot be in the future and that returns can only be requested for delivered orders.

Order Validation Rule

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
No_Future_Order_Date	Top of Page	Order date cannot be in the future.	✓	Poojitha Surya Rajeshwari Chinnam, 9/26/2025, 2:31 AM

Return Request Validation Rule

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Return_Only_For_Delivered	Top of Page	Return can only be requested for delivered orders.	✓	Poojitha Surya Rajeshwari Chinnam, 9/26/2025, 2:34 AM

2. Roll-Up Summary Fields

- Customer__c → Total_Orders__c (COUNT of Orders)
- Customer__c → Total_Spend__c (SUM of Order.Total_Amount__c)

SETUP > OBJECT MANAGER
Customer

Details

Fields & Relationships
11 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

Customer Name	Name	Text(80)	✓	▼
Customer Type	Customer_Type__c	Picklist		▼
Email	Email__c	Email		▼
Last Modified By	LastModifiedById	Lookup(User)		▼
Loyalty Points	Loyalty_Points__c	Number(18, 0)		▼
Name	Name__c	Text(30)		▼
Owner	OwnerId	Lookup(User,Group)	✓	▼
Phone	Phone__c	Phone		▼
Total Orders	Total_Orders__c	Roll-Up Summary (COUNT Order)		▼
Total Spend	Total_Spend__c	Roll-Up Summary (SUM Order)		▼

3. Record-Triggered Flow (Order Notifications)

Object: Order__c

Trigger: When Status__c changes

Action:

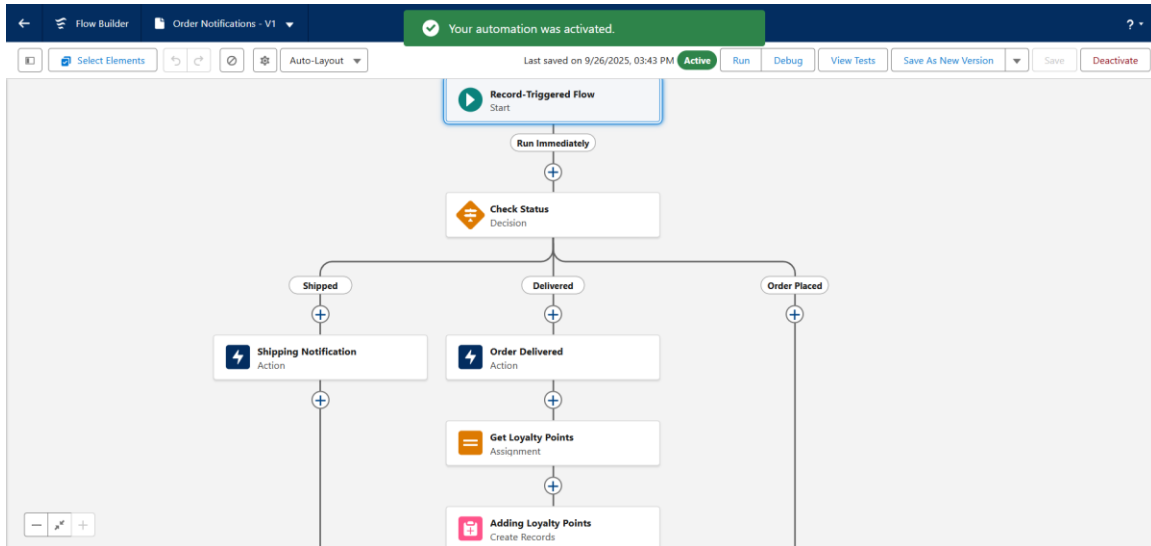
- If “Shipped” → Send Email/SMS “Your order has been shipped.”
- If “Delivered” → Send Email “Thank you for shopping! Please rate us.”

4. Before-Save Flow (Auto Loyalty Points)

Object: Order__c

Trigger: Before Save, if Status__c = Delivered

Logic: Add 1 loyalty point per ₹100 spent → Create Loyalty_Transaction_c.



5. Approval Process (Return Requests)

Object: Return_Request__c

Entry Criteria: Status__c = Approved

Approver: Customer Service Manager

Actions:

- If Approved → Trigger Refund workflow
- If Rejected → Set Status__c = Rejected

The screenshot shows the Salesforce Setup page for Approval Processes. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Approval Processes' and shows the 'Return Request: Return Request Approval' process. 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 columns for Action Type and Description. The 'Approval Steps' section shows a table with columns for Step Name and Description.

Process Name	Unique Name	Description	Entry Criteria	Record Editability	Approval Assignment Email Template	Initial Submitters	Created By
Return Request Approval	Return_Request_Approval	Return Request Approval	Return Request: Status EQUALS Pending	Administrator ONLY	Sales, New Customer Email	Return Request Owner	Poojitha Surya Rajeshwari Chinnam, 9/26/2025, 3:20 AM

Action Type	Description
Record Lock	Lock the record from being edited

Step Name	Description
	You have not yet defined any approval steps