

Pet Adoption Tracker – Phase 4 Setup

Phase 4: Process Automation (Admin)

1. Validation Rules

This rule ensures that you always have a way to contact a potential adopter.

- **Object:** Adopter__c
- **Rule Name:** Contact_Method_Required
- **Error Condition Formula:**
- ISBLANK>Email__c) && ISBLANK(Phone__c)
- **Error Message:** "You must provide either an email address or a phone number for the adopter."
- **Error Location:** Top of Page

Adopter Validation Rule

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Validation Rule Detail		Edit	Clone	
Rule Name	Contact_Method_Required			Active ✓
Error Condition Formula	ISBLANK>Email__c) && ISBLANK(Phone__c)			
Error Message	You must provide either an email address or a phone number for the adopter.			Error Location Top of Page
Description				
Created By	SURLA HARSHA VARDHAN, 9/23/2025, 10:27 AM			Modified By SURLA HARSHA VARDHAN, 9/23/2025, 10:27 AM
		Edit	Clone	

2. No_Duplicate_Active_Requests

- **Object:** Adoption_Request__c
- **Rule Name:** No_Duplicate_Active_Requests
- **Error Condition Formula:**

AND(

ISPICKVAL>Status__c, "Active"),

Pet__r.Active_Requests__c > 0

)

- **Error Message:**
This Pet already has an active adoption request. Only one active request per pet is allowed.
- **Error Location:** Field = Pet__c

Adoption Request Validation Rule

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Validation Rule Detail

[Edit](#) [Clone](#)

Rule Name	No_Duplicate_Active_Requests
Error Condition Formula	AND(ISPICKVAL(Status__c, "Active") Pet__r.Active_Adoption_Requests__c > 1)
Error Message	Only one active adoption request is allowed per pet
Description	
Created By	SURLA HARSHA VARDHAN, 9/23/2025, 11:03 AM

[Edit](#) [Clone](#)

3. Adoption Fee Required on Approval

This rule ensures that a record of the adoption fee is captured before a request is marked as approved.

- **Object:** Adoption_Request__c
- **Rule Name:** Adoption_Fee_Required_on_Approval
- **Error Condition Formula:**
- AND(
- ISPICKVAL(Status__c, "Approved"),
- ISBLANK(Adoption_Fee__c)
-)
- **Error Message:** "You cannot approve this request without entering the adoption fee."
- **Error Location:** Top of Page

Adoption Request Validation Rule

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Validation Rule Detail

[Edit](#) [Clone](#)

Rule Name **Adoption_Fee_Required_on_Approval**

Error Condition Formula **AND(
ISPICKVAL(Status__c, "Approved"),
ISBLANK(Adoption_Fee__c)
)**

Error Message **we cannot approve this request without entering the adoption fee**

Description

Created By **SURLA HARSHA VARDHAN, 9/23/2025, 11:11 AM**

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2. Workflow Rules

1. Send Email Alert on New Adoption Request

This rule automatically notifies the adoption team when a new request is submitted, so they can follow up quickly.

- Object: **Adoption_Request__c**
- Rule Name: **Notify_Adoption_Coordinator**
- Evaluation Criteria: Evaluate the rule when a record is created, and every time it's edited.
- Rule Criteria: Status__c equals "Submitted"

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria **Adoption Request: Status EQUALS Approved**
Evaluation Criteria **Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria**

Immediate Workflow Actions

Action	Type	Description
Edit Remove	Email Alert	<u>Adoption_Request_Approved</u>

[Add Actions ▾](#)

Time-Dependent Workflow Actions [See an example](#)

 No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

[Add Time Trigger](#)

2. Update Pet Status to "Adopted"

This rule automatically changes a pet's status once their adoption request is approved, ensuring your records are always up-to-date.

- **Object:** Adoption_Request__c
- **Rule Name:** Update_Pet_Status_to_Adopted
- **Evaluation Criteria:** Evaluate the rule when a record is created, and any time it's edited to subsequently meet the criteria.
- **Rule Criteria:** Status__c equals "Approved"

The screenshot shows the 'Workflow Rules' page in the Salesforce setup. The rule is named 'Update_Pet_Status_to_Adopted'. It is active and set to evaluate when a record is created or edited. The rule criteria is 'Adoption Request: Status EQUALS Approved'. The object is 'Adoption Request'. The rule was created by 'SURLA HARSHA VARDHAN' on 9/24/2025, 6:10 AM. The workflow actions section shows a single immediate action: 'Change_Pet_Status' on the 'Field Update' type. A note at the bottom states: 'No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.'

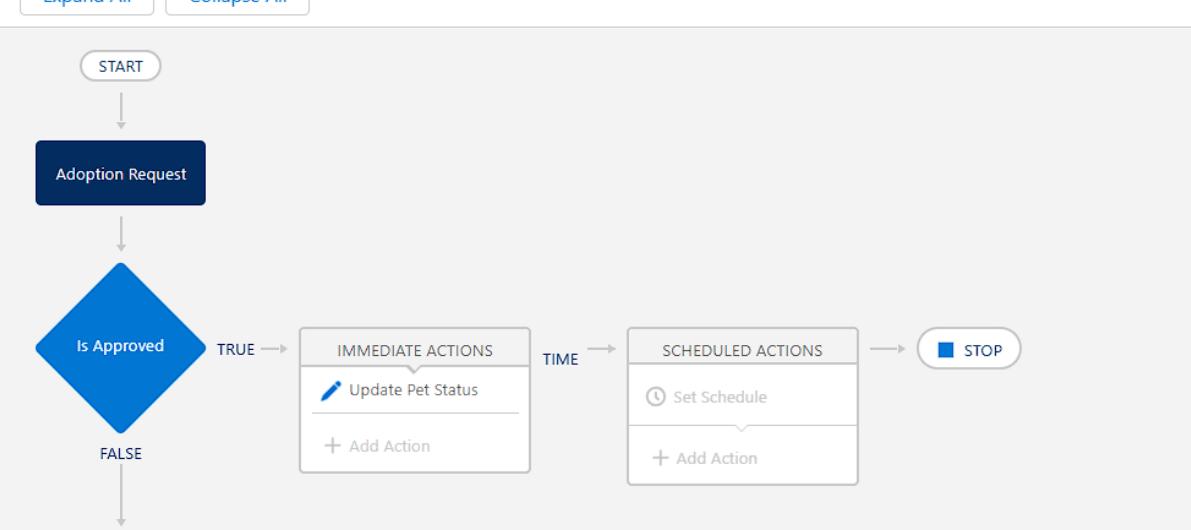
3. Process Builder

Update Pet Status to "Adopted"

This process will listen for a change on an Adoption_Request record and then automatically update the related Pet record.

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Process Builder - Update Pet Status on Adoption



4.Approval Process

Approve High-Value Donations

This process will automatically submit a donation record for manager approval if the donation amount exceeds a certain threshold.

Approval Processes: High-Value Donation Approval [Help for this Page](#)

[« Back to Approval Process List](#)

Process Definition Detail	
Process Name	High Value Donation Approval
Unique Name	High_Value_Donation_Approval
Description	
Entry Criteria	Donation: Donation Amount GREATER OR EQUAL 5000
Record Editability	Administrator ONLY
Approval Assignment Email Template	
Initial Submitters	Donation Owner
Created By	SURLA HARSHA VARDHAN 9/24/2025, 6:40 AM
Modified By	SURLA HARSHA VARDHAN 9/24/2025, 6:49 AM

Initial Submission Actions	
Action	Type
Record Lock	Description
Edit Remove	Lock the record from being edited

Approval Steps						
Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Manager Approval			User SURLA HARSHA VARDHAN	Final Rejection
Show Actions Edit	2	Step 1			Manually Chosen	Final Rejection

Final Approval Actions	
Add Existing	Add New

5.Email Alerts

Purpose: Automatically notify customers when key actions occur.

Implemented Alerts:

- **Payment Received Email Alert**
 - **Object:** Adoption request approved
 - **Email Template:** pet adoption request is approved
 - **Recipients:** Customer email (configured for testing to owner email)

The screenshot shows the 'Email Alert Detail' section for an alert named 'Adoption_Request_Approved'. It includes fields for Description (Adoption_Request_Approved), Unique Name (Adoption_Request_Submitted_Email), From Email Address (Current User's email address), Recipients (Role_Adoption Manager), and Additional Emails (SURLA HARSHA VARDHAN). The Email Template is 'New_Adoption_Request_Notification' for Object 'Adoption Request'. The alert was created by SURLA HARSHA VARDHAN on 9/24/2025, 6:01 AM, and modified by the same user on the same date and time. Below the detail section are three tabs: 'Rules Using This Email Alert', 'Approval Processes Using This Email Alert', and 'Entitlement Processes Using This Email Alert'. The 'Rules Using This Email Alert' tab shows one rule named 'Notify_Adoption_Coordinator' with the description 'Notify Adoption Coordinator' and object 'Adoption Request'. The 'Active' checkbox is checked. The other two tabs are currently empty.

Purpose: new Request for pet adoption

Description: Notify Adoption Coordinator of new request

Unique Name: Adoption_Request_Submitted_Notification

Object: Adoption_Request__c (This is the object the alert will be triggered from)

The screenshot shows the 'Email Alert Detail' section for an alert named 'Notify Adoption Coordinator of new request'. It includes fields for Description (Notify Adoption Coordinator of new request), Unique Name (Adoption_Request_Submitted_Notification), From Email Address (Current User's email address), Recipients (User_Adoption Manager, User_Adoption Staff), and Additional Emails (harshabunny2020@gmail.com, niklesh.k@gmail.com). The Email Template is 'New_Adoption_Request_Notification' for Object 'Adoption Request'. The alert was created by SURLA HARSHA VARDHAN on 9/24/2025, 11:19 AM, and modified by the same user on the same date and time. Below the detail section are three tabs: 'Rules Using This Email Alert', 'Approval Processes Using This Email Alert', and 'Entitlement Processes Using This Email Alert'. The 'Rules Using This Email Alert' tab shows no rules. The 'Approval Processes Using This Email Alert' and 'Entitlement Processes Using This Email Alert' tabs are currently empty.

6. Custom Notifications

Notify the Adoption Coordinator of a New Request

This ensures that the adoption team is immediately aware of a new request, allowing for a quick follow-up. This is much faster and more direct than waiting for a user to check their email.

The screenshot shows the Salesforce Setup interface with the following details:

- Custom Notifications**: The page title, located at the top left.
- NOTIFICATION NAME**: A column header for the table.
- API NAME**: A column header for the table.
- NAMESPACE**: A column header for the table.
- DESKTOP**: A column header for the table.
- MOBILE**: A column header for the table.

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	▼
New Adoption Request Alert	New_Adoption_Request_Alert		✓	✓