

# Phase 4: Process Automation (Admin) – GreenFuture CRM

## 1. Validation Rules

### Purpose:

Ensure data integrity and prevent incorrect data entry in Projects, Carbon Credits, and Partners.

### Implementation Steps:

1. Setup → Object Manager → Select Object → Validation Rules → New.

The screenshot shows the Salesforce Object Manager interface for the 'Sustainability Project' object. The 'Validation Rule Detail' section is active, displaying the following information:

Validation Rule Detail	
Rule Name	EndDate_After_StartDate
Error Condition Formula	End_Date__c < Start_Date__c
Error Message	End Date cannot be earlier than Start Date.
Description	Ensures project timelines are logical and prevents negative project durations.
Created By	Eshwari Santosh Lade, 26/09/2025, 9:54 am
Modified By	Eshwari Santosh Lade, 26/09/2025, 9:54 am
Active	<input checked="" type="checkbox"/>
Error Location	End Date

The screenshot shows the Salesforce Object Manager interface for the 'Carbon Credit' object. The 'Validation Rule Detail' section is active, displaying the following information:

Validation Rule Detail	
Rule Name	CreditAmount_Positive
Error Condition Formula	Credit_Amount__c <= 0
Error Message	Credit Amount must be greater than 0.
Description	Prevents invalid or negative credit values, ensuring carbon credits always represent a positive offset.
Created By	Eshwari Santosh Lade, 26/09/2025, 9:56 am
Modified By	Eshwari Santosh Lade, 26/09/2025, 9:56 am
Active	<input checked="" type="checkbox"/>
Error Location	Credit Amount

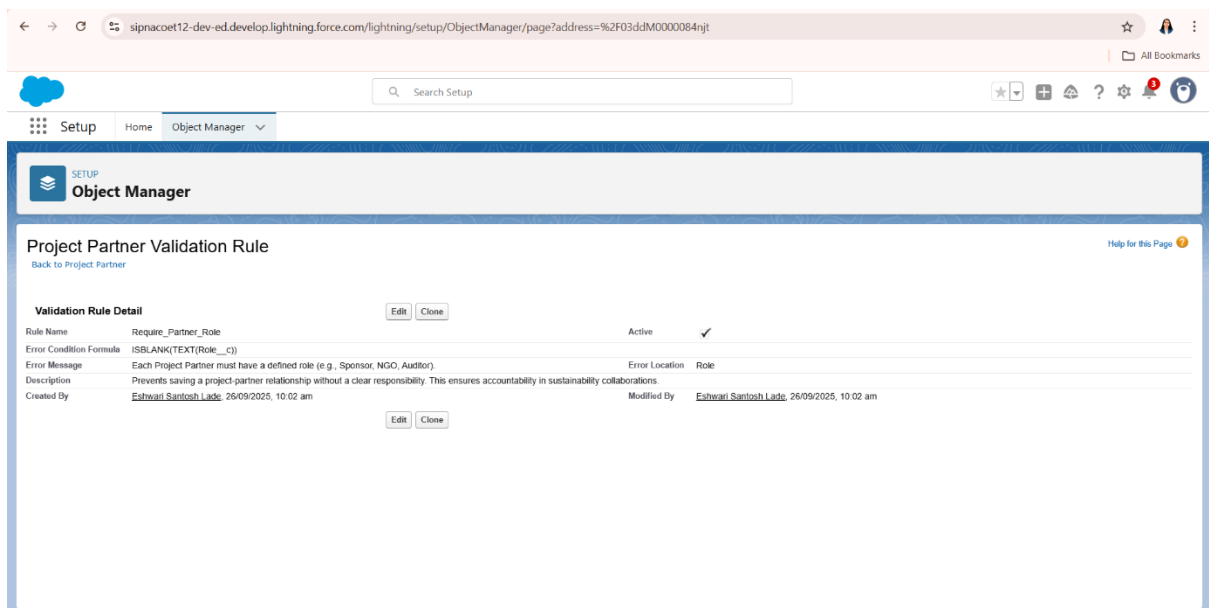
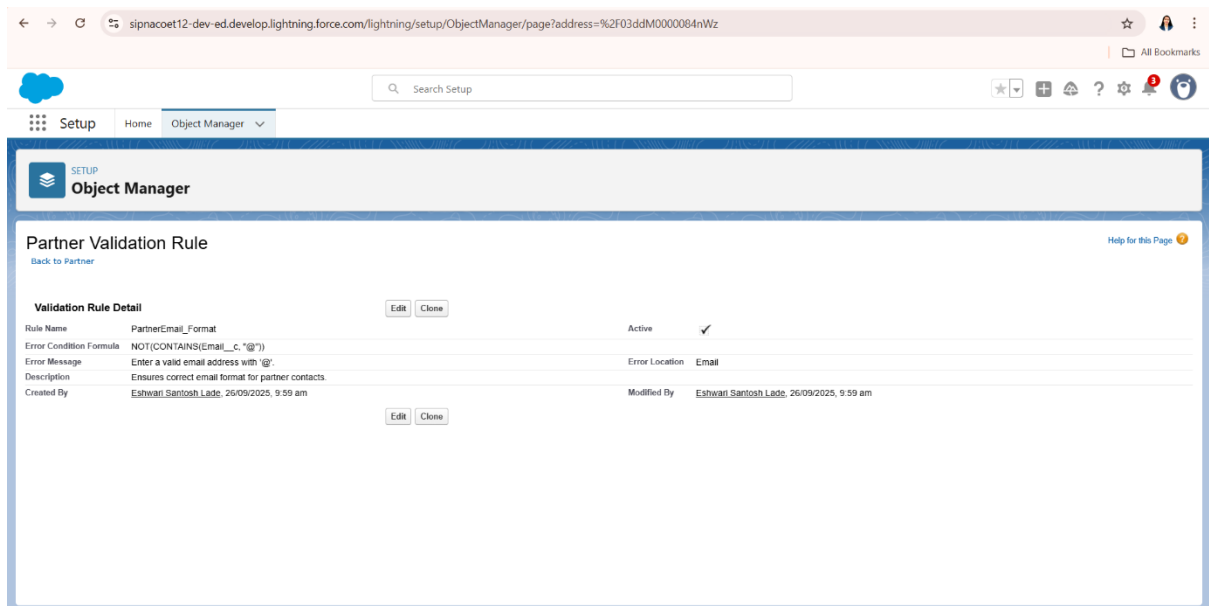


Fig.4.1. Validation Rule setup

## 2. Workflow Rules

### Purpose:

Automate simple business processes like notifications or field updates.

### Implementation Steps:

1.Setup → Workflow Rules → New Rule → Select Object.

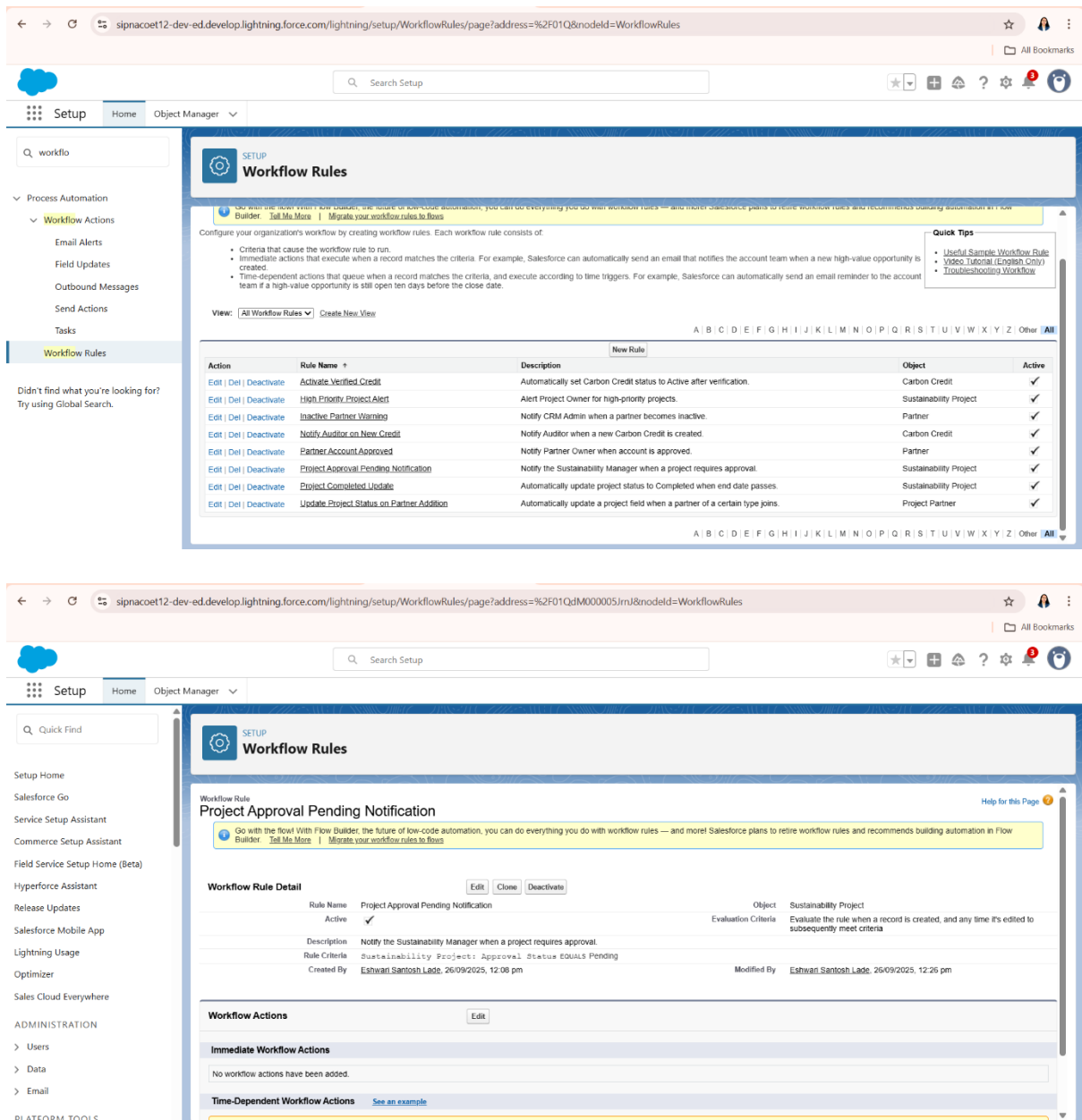


Fig.4.2. Workflow Rule setup page

### 3. Approval Process

#### Purpose:

Automate approval flows for Projects or Carbon Credits before they can be marked as complete or active.

#### Implementation Steps:

1. Setup → Approval Processes → New Approval Process → Select Object.

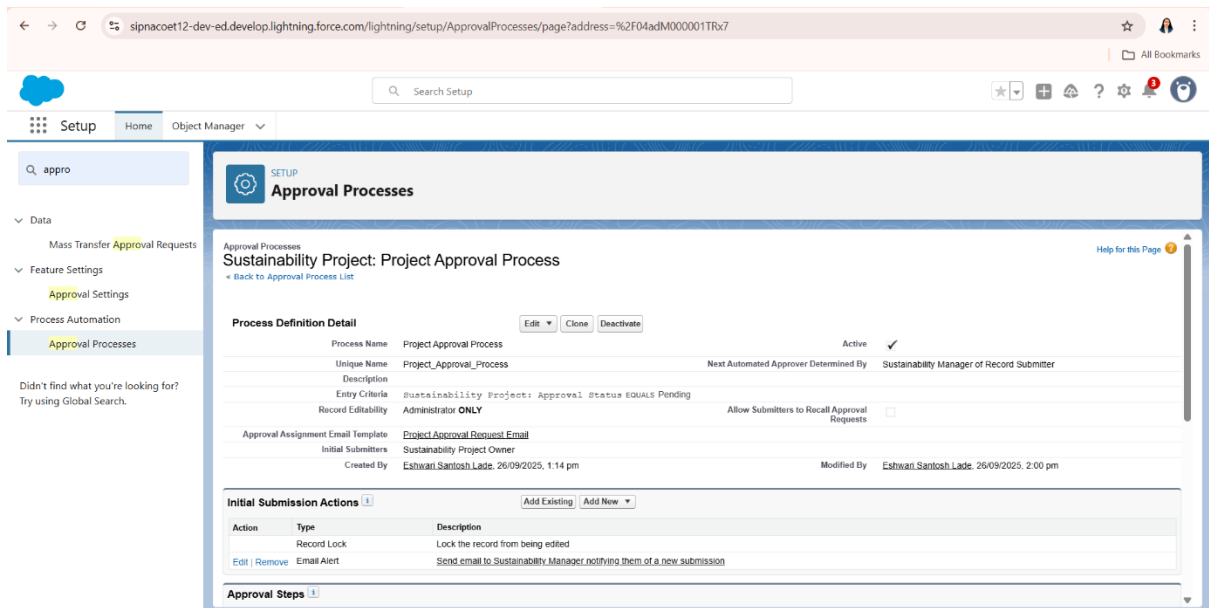


Fig. 4.3. Approval Process configuration page

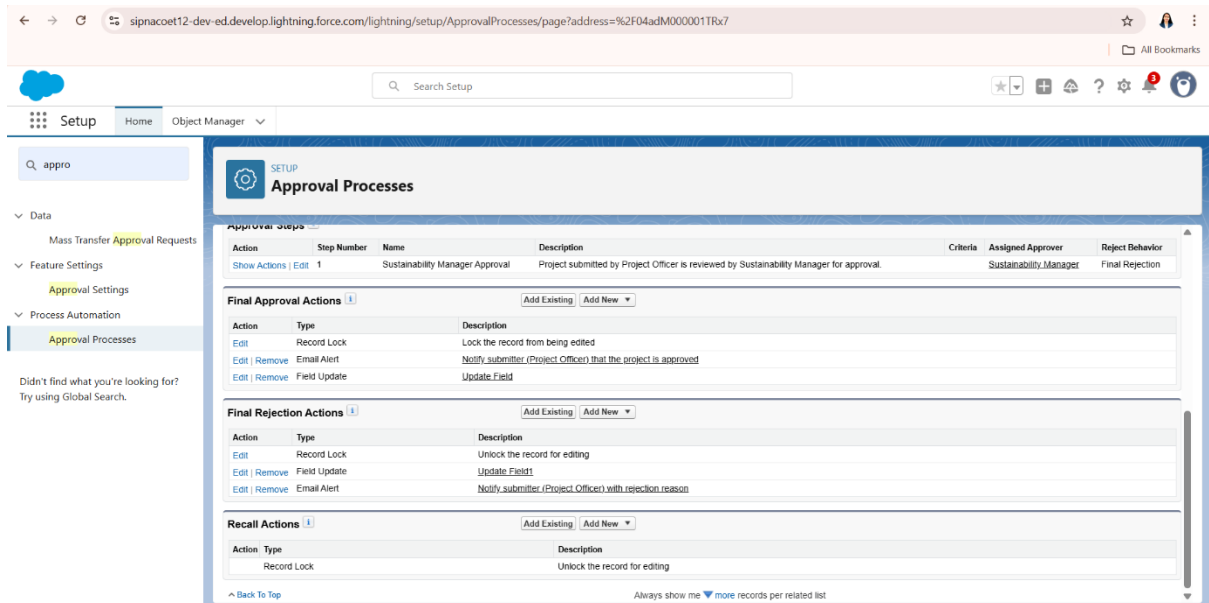


Fig. 4.4. Approval Steps detail

## 5. Flow Builder

### Purpose:

Automate more advanced, interactive, or scheduled processes.

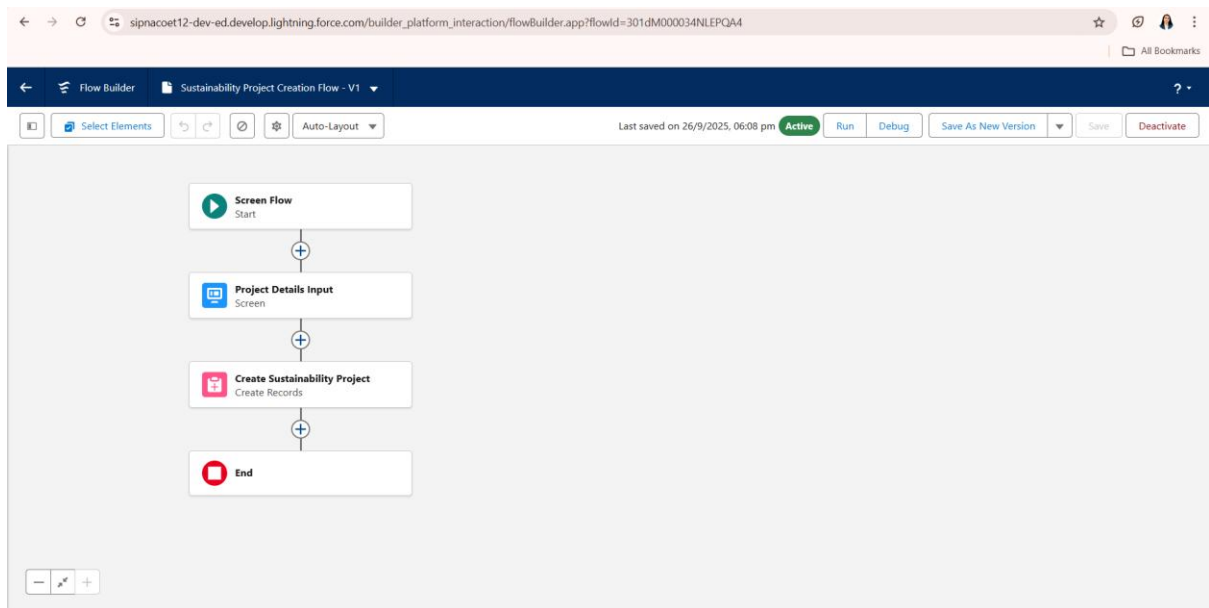
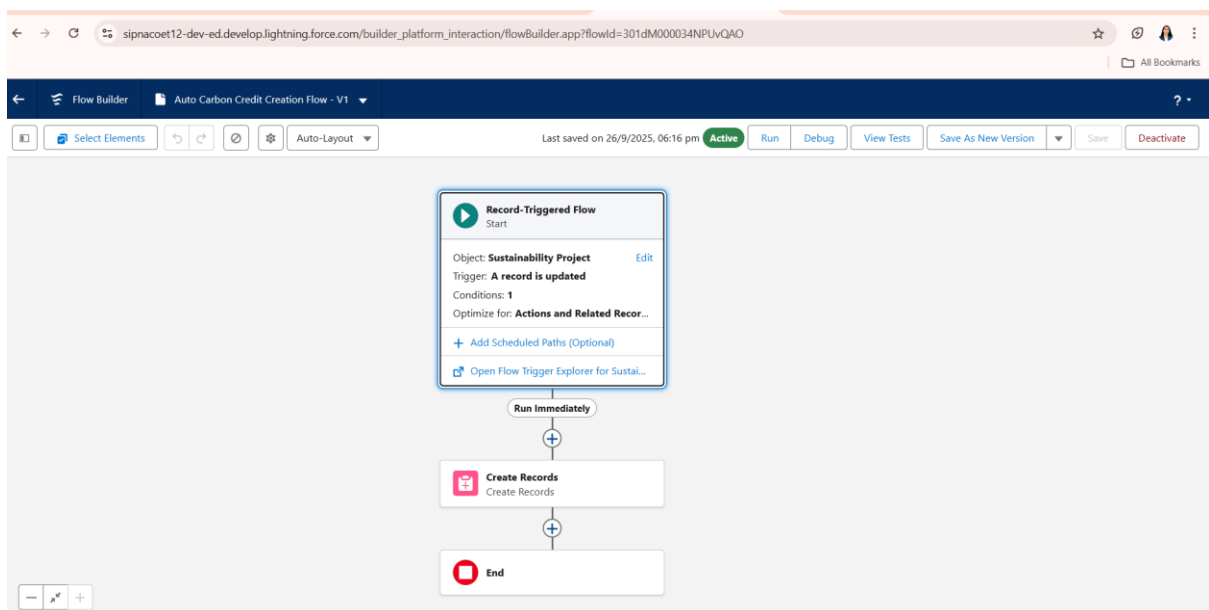


Fig.4.5. Screen Flow preview showing all input fields and dynamic visibility



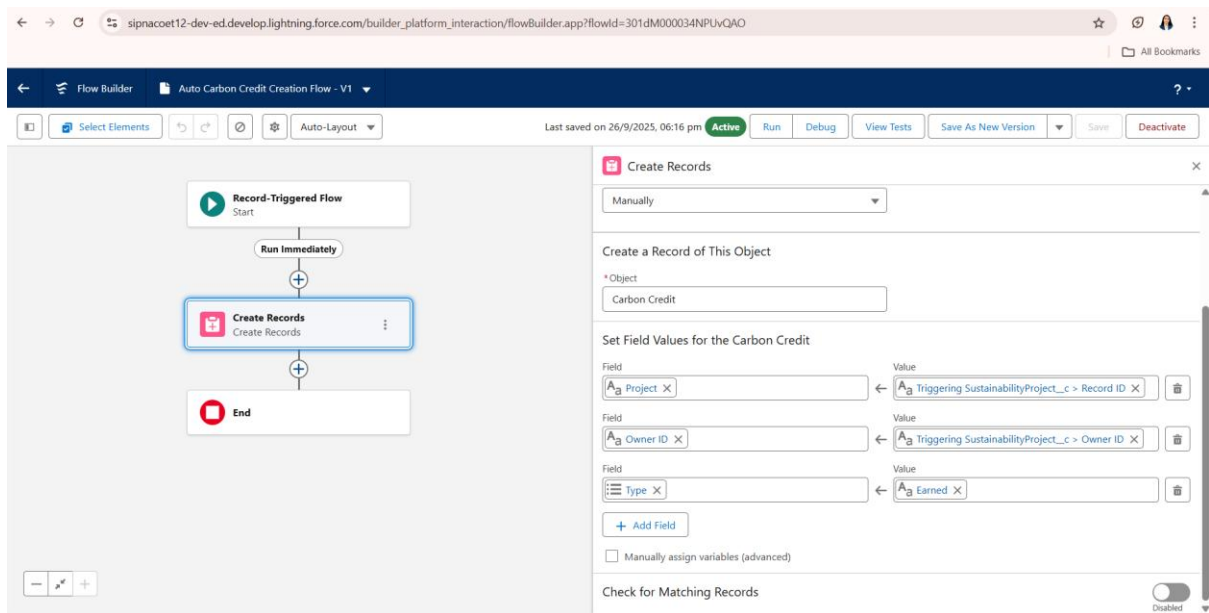


Fig.4.6. Flow Builder canvas for Record-Triggered Flow showing trigger and Create Records elements.

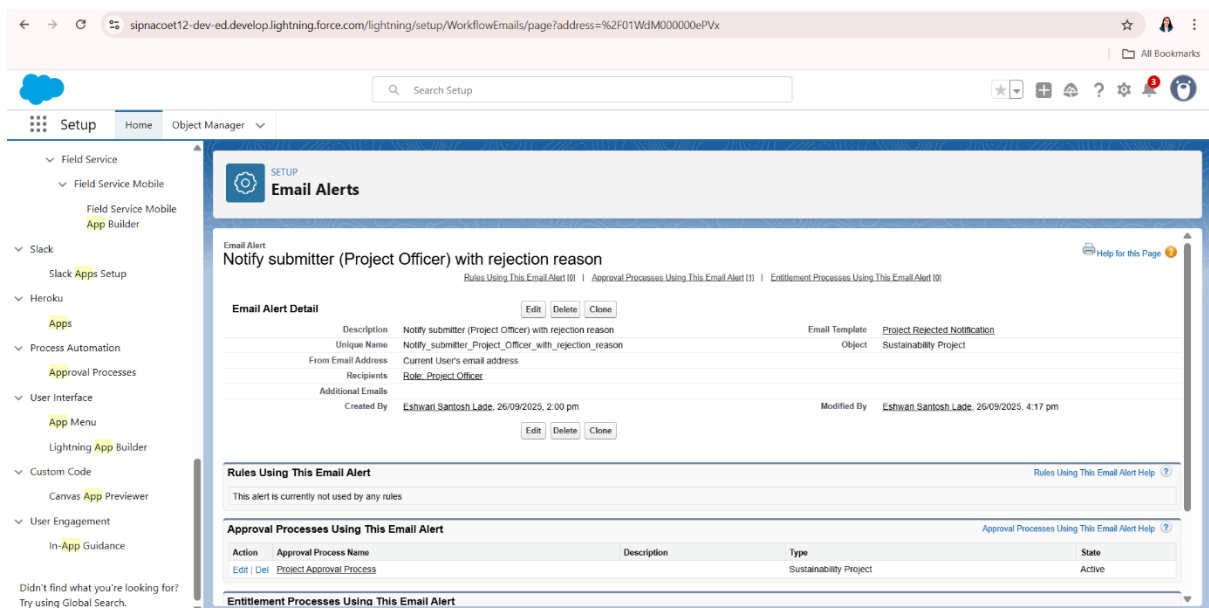
## 5. Email Alerts

### Purpose:

Send automated emails to users, partners, or stakeholders.

### Implementation Steps:

1. Setup → Email Alerts → New → Select Object & Template.



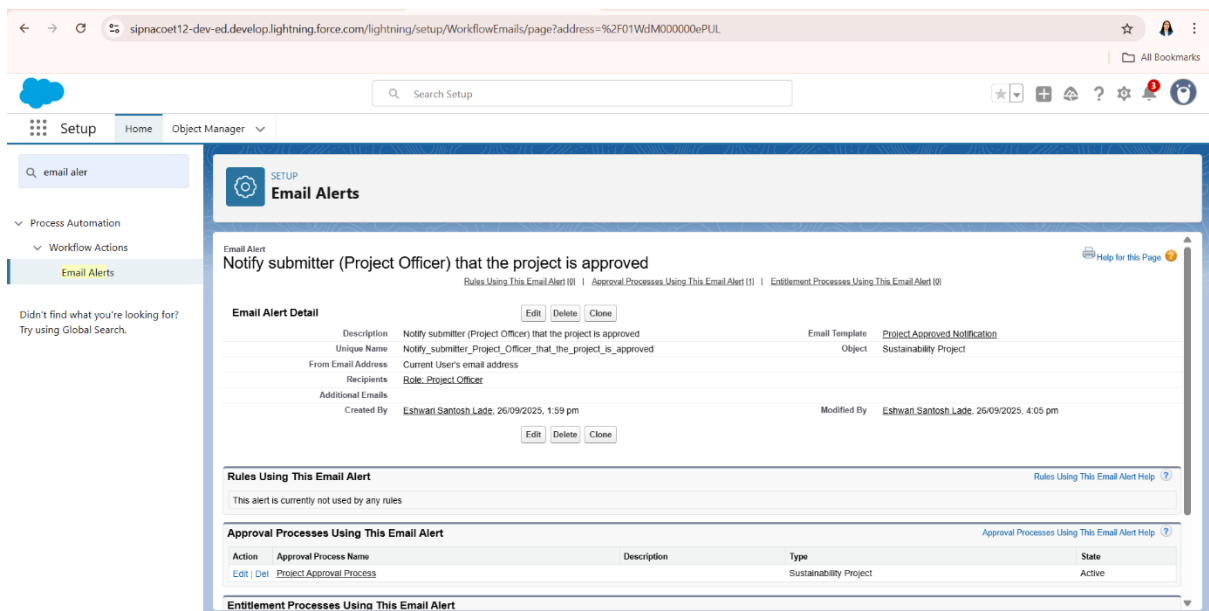
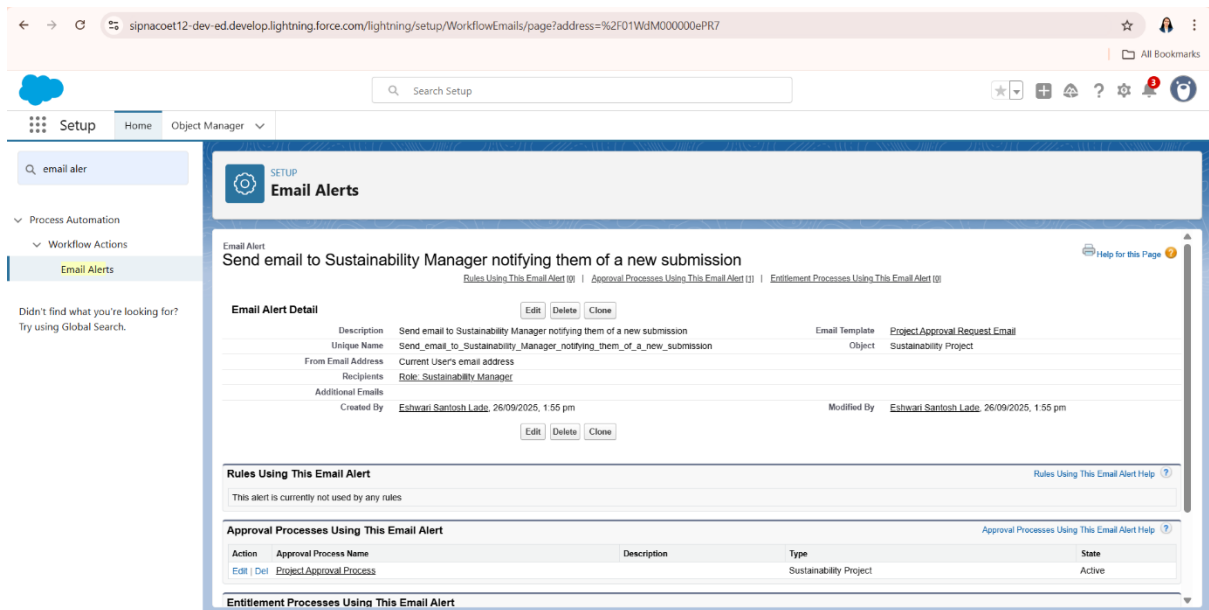


Fig.4.7. Email Alert configuration page

## 6. Field Updates

### Purpose:

Automatically update fields based on conditions.

### Implementation Steps:

1. Setup → Field Updates → New → Select Object & Field

Setup | Home | Object Manager | Field Updates

### Field Updates

Field Update: Approve Project

Rules Using This Field Update: 00 | Approval Processes Using This Field Update: 01 | Entitlement Processes Using This Field Update: 00

**Field Update Detail**

Name	Approve Project
Unique Name	Approve_Project
Description	
Object	Sustainability Project
Field to Update	Sustainability Project: Approval Status
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	<input checked="" type="checkbox"/>
New Field Value	Approved

**Rules Using This Field Update**

This field update is currently not used by any rules.

**Approval Processes Using This Field Update**

Action	Approval Process Name	Description	Type	State

Setup | Home | Object Manager | Field Updates

### Field Updates

Field Update: Reject Project

Rules Using This Field Update: 00 | Approval Processes Using This Field Update: 01 | Entitlement Processes Using This Field Update: 00

**Field Update Detail**

Name	Reject Project
Unique Name	Reject_Project
Description	
Object	Sustainability Project
Field to Update	Sustainability Project: Approval Status
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	<input checked="" type="checkbox"/>
New Field Value	Rejected

**Rules Using This Field Update**

This field update is currently not used by any rules.

**Approval Processes Using This Field Update**

Action	Approval Process Name	Description	Type	State

Fig.4.8. Field Update setup page



## Current Field Updates for GreenFuture CRM

Name	Object	Field to Update	Value	Trigger / Purpose
<b>Approve Project</b>	SustainabilityProject__c	Approval_Status__c	Approved	Sets the project's approval status to <b>Approved</b> when the project passes final approval in the approval process.
<b>Reject Project</b>	SustainabilityProject__c	Approval_Status__c	Rejected	Sets the project's approval status to <b>Rejected</b> when the project fails final approval in the approval process.
<b>Change Case Priority to High</b>	Case	Priority	High	Automatically updates case priority to <b>High</b> when certain workflow criteria are met.

## 7. Tasks

### Purpose:

Automate task creation for reminders, follow-ups, and approvals.

### Implementation Steps:

1. Setup → Workflow/Process Builder/Flow → Add Task Action.



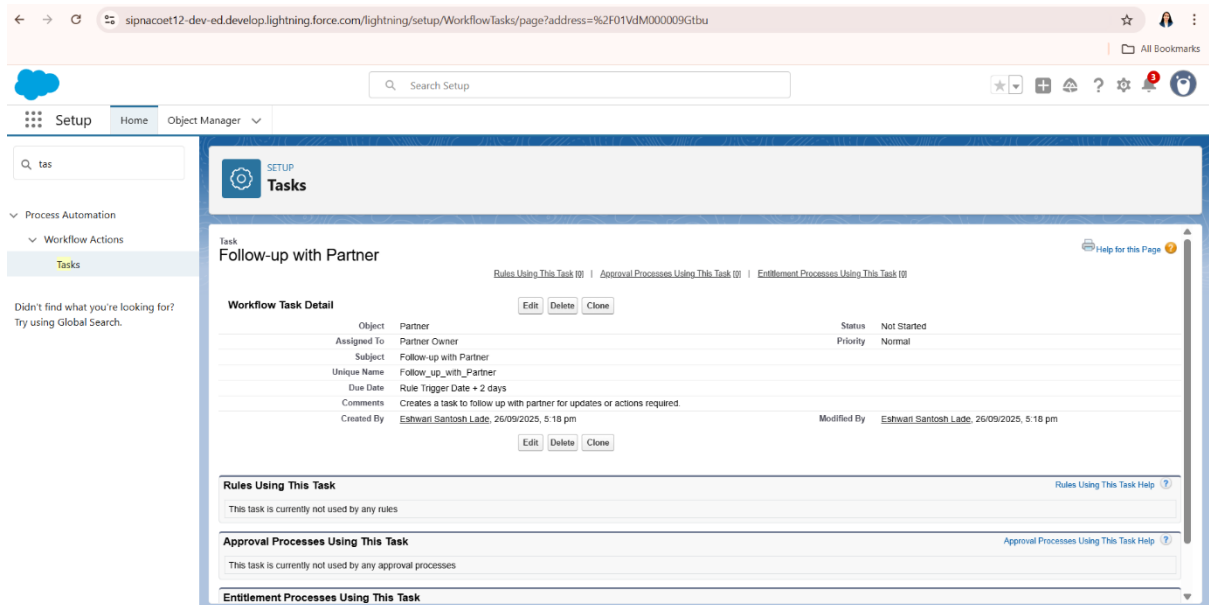


Fig.4.9. Task creation Page

## 8. Custom Notifications

### Purpose:

Send in-app notifications for immediate attention.

### Implementation Steps:

1. Setup → Notifications → New → Select Object & Criteria.

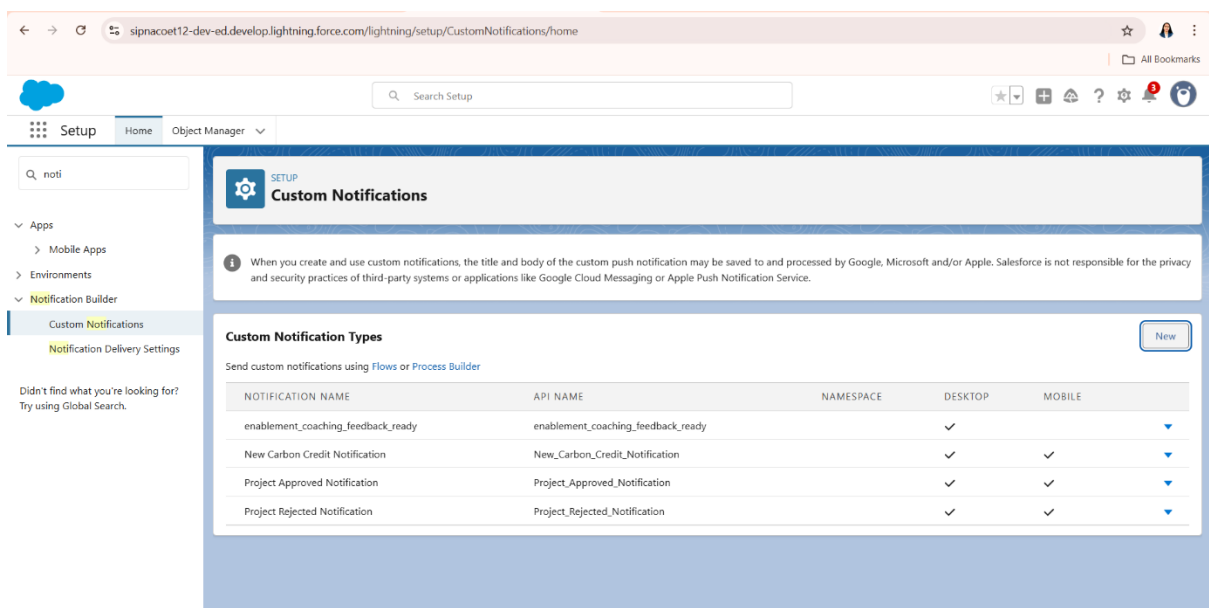


Fig.4.10. Custom Notification setup page

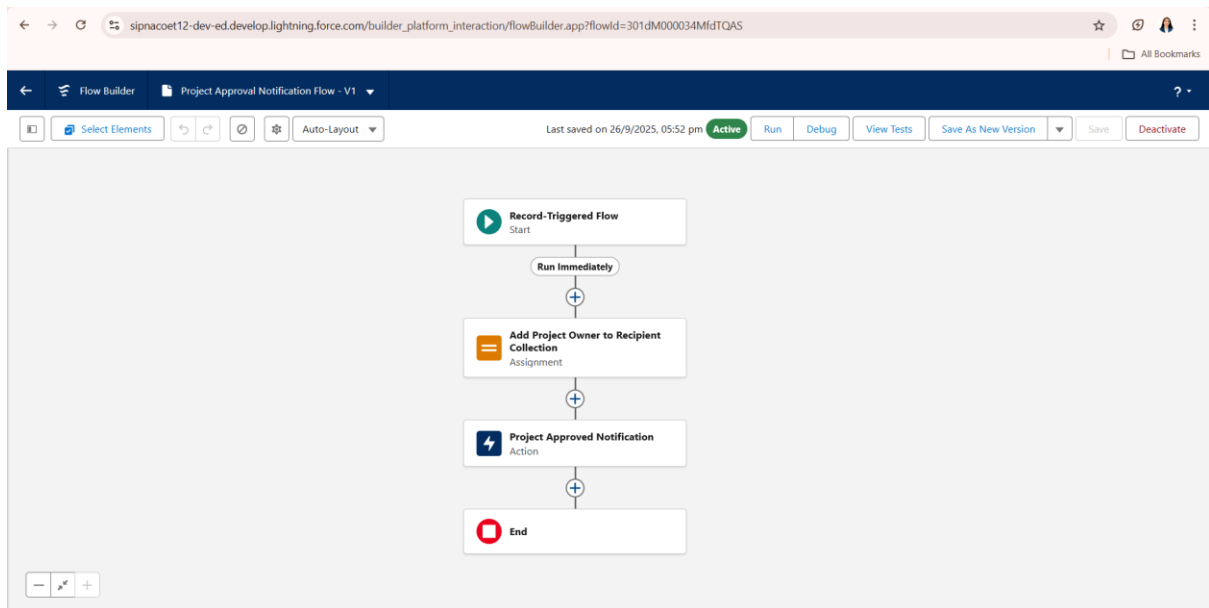


Fig.4.11. Project Approval Notification Flow