

Phase4 : Process Automation (Admin)

◆ Validation Rules

Step 1: Validation Rule on Quote (Discount Limit)

Goal: Prevent Sales Reps from entering a discount higher than 40%.

Steps:

Go to Setup → Object Manager → Quote.

Click Validation Rules → New.

Fill details:

Rule Name: Discount_Limit

Error Condition Formula:

SBQQ__CustomerDiscount__c > 0.40

(Assuming SBQQ__CustomerDiscount__c is the discount field in CPQ. If your org has Discount__c, use that instead.)

Error Message: Discount cannot exceed 40%. Please submit for manager approval.

Error Location: Field → select Discount field.

2. Save

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Object Manager' with a 'SETUP' button. Below the title, it says 'Quote Validation Rule'. A 'Back to Quote' link is visible. The 'Validation Rule Detail' section contains the following information:

Validation Rule Detail	
Rule Name	Discount_Limit
Error Condition Formula	SBQQ__CustomerDiscount__c > 0.40
Error Message	Discount cannot exceed 40%. Please submit for manager approval.
Description	
Created By	Gauri Shirke, 22/09/2025, 5:44 pm
Active	<input checked="" type="checkbox"/>
Error Location	Additional Disc. (%)
Modified By	Gauri Shirke, 22/09/2025, 5:44 pm

At the bottom of the detail section are 'Edit' and 'Clone' buttons.

Step 2: Validation Rule on Inventory (No Negative Stock)

Goal: Prevent negative stock values in Inventory.

Steps:

Go to Setup → Object Manager → Inventory__c.

Click Validation Rules → New.

Fill details:

Rule Name: No_Negative_Stock

Error Condition Formula:

Stock_Level__c < 0

Error Message: Stock Level cannot be negative.

Error Location: Field → Stock Level.

2. Save

The screenshot shows the 'Object Manager' section of the Salesforce setup. A validation rule named 'No_Negative_Stock' has been created. The rule's formula is 'Stock_Level__c < 0', and its message is 'Stock Level cannot be negative'. It is active and points to the 'Stock Level' field in the 'Inventory' object. The creation and modification details show 'Gauri Shirke' as the user and the current date and time.

The screenshot shows a 'New Inventory' dialog box. The 'Stock Level' field contains '-10.00', which triggers an error message: 'Stock Level cannot be negative.' A modal window titled 'We hit a snag.' lists the validation error for the 'Stock Level' field. The background shows the 'Quote-to-Cash Hub' interface with the 'Inventories' tab selected.

◆ Workflow Rules

➤ Go to Setup → Workflow Rules

- Click New Rule.

➤ Select Object

- Pick Quote (SBQQ__Quote__c)

- Click Next.

➤ Rule Criteria

- Rule Name: Expire_Quote_After_Date
- Evaluation Criteria: "Created, and every time it's edited to subsequently meet criteria."
- Rule Criteria: Formula evaluates to true

• Formula:

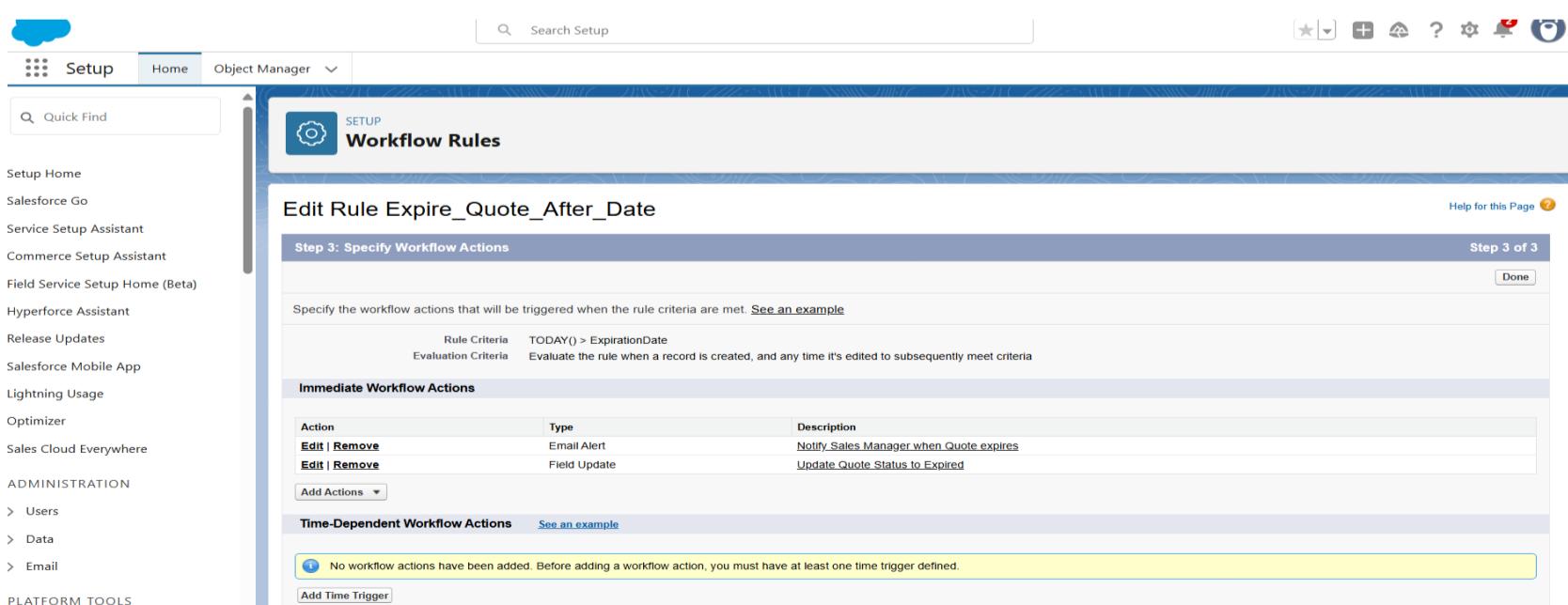
- TODAY() > SBQQ_ExpirationDate_c

➤ Add Workflow Action → Field Update

- Action Type: New Field Update
- Name: Update_Quote_Status_to_Expired
- Field to Update: Status (SBQQ_Status_c)
- Value: Expired

Step 2: Email Alert Action

- Go to Workflow Rule → Expire_Quote_After_Date.
- Under Immediate Workflow Actions → Add Workflow Action → New Email Alert.
- Fill in:
 - Description: Notify Sales Manager when Quote expires
 - Email Template: Quote_Expired_Alert
 - Recipients: Choose Role → Sales Manager (or specific users).
- Save.



◆ Approval Process

Step 1: Navigate to Approval Processes

1. Go to Setup → Approval Processes.
2. Click Manage Approval Processes For → Quote (SBQQ__Quote__c).
3. Click Create New Approval Process → Use Jump Start Wizard.

Step 2: Define Basic Info

- Process Name: Quote_Discount_Approval
- Entry Criteria:
OR(SBQQ__AdditionalDiscount__c > 0.20, Lead_Time__c > 30)

Step 3: Specify Approver

- Assign the first approver as Sales Manager (Role).

Step 4: Final Approval & Rejection Actions

1. On Final Approval:
 - Field Update → set Status = Approved.
 - Email alert to Sales Rep → “Quote Approved”.
2. On Final Rejection:
 - Field Update → set Status = Rejected.
 - Email alert to Sales Rep → “Quote Rejected ”.

The screenshot shows the 'Approval Processes' setup screen for a quote discount approval process. The process is named 'Quote_Discount_Approval'. It includes a description of the entry criteria: OR(SBQ__CustomerDiscount__c > 0.20, Lead_Time__c > 30). The record is editable by administrators only. The approval assignment email template is set to 'Sales: New Customer Email'. The initial submitter is the quote owner, and it was created by sales.manager on 22/09/2025, 11:23 pm. The process is active. The 'Initial Submission Actions' section contains a 'Record Lock' action. The 'Approval Steps' section shows one step named 'Step 1' assigned to sales.manager. The 'Final Approval Actions' section includes actions like 'Record Lock', 'Email Alert' (Notify Sales Rep when Quote is Approved), and 'Field Update' (Set Status Approved). The 'Final Rejection Actions' section includes actions like 'Record Lock', 'Field Update' (Set Status Rejected), and 'Email Alert' (Notify Sales Rep when Quote is Rejected). The 'Recall Actions' section is empty.

This screenshot shows the same approval process configuration as the first one, but with additional sections for 'Final Approval Actions' and 'Final Rejection Actions'. The 'Final Approval Actions' section includes 'Record Lock', 'Email Alert' (Notify Sales Rep when Quote is Approved), and 'Field Update' (Set Status Approved). The 'Final Rejection Actions' section includes 'Record Lock', 'Field Update' (Set Status Rejected), and 'Email Alert' (Notify Sales Rep when Quote is Rejected).

◆ Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)

A. Guided Selling (Screen Flow)

Goal: Help Sales Reps configure products step by step while creating a Quote.

Steps to Build:

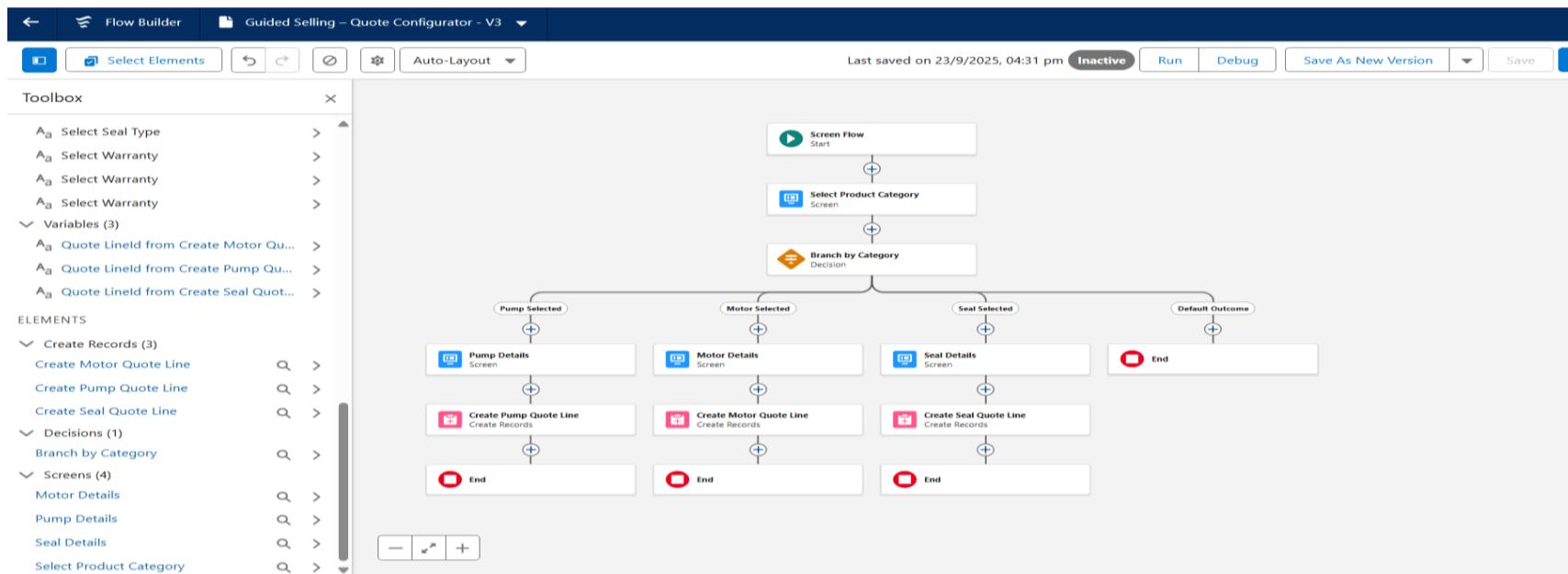
1. Go to Setup → Flows → New Flow.
2. Select Screen Flow → Create.
3. Add first Screen element:
 - o Label: Select Product Category
 - o Add a Picklist field: Categories (Pump, Motor, Seal).

4. Add Decision element:

- If Pump selected → show Pump-related options.
- If Motor selected → show Motor-related options.

5. At the end → Create Records element → Create a new Quote Line (SBQQ__QuoteLine__c)

6. Save → Activate



B. Real-Time Inventory Check (Record-Triggered Flow)

Goal: Prevent reps from quoting more items than available in stock.

Steps to Build:

1. Go to Setup → Flows → New Flow.

2. Select Record-Triggered Flow.

3. Object: SBQQ__QuoteLine__c.

4. Trigger: When record is created or updated.

5. Add Get Records element:

- Object: Inventory__c
- Filter: Inventory__c.Name = QuoteLine.Inventory_Lookup field.

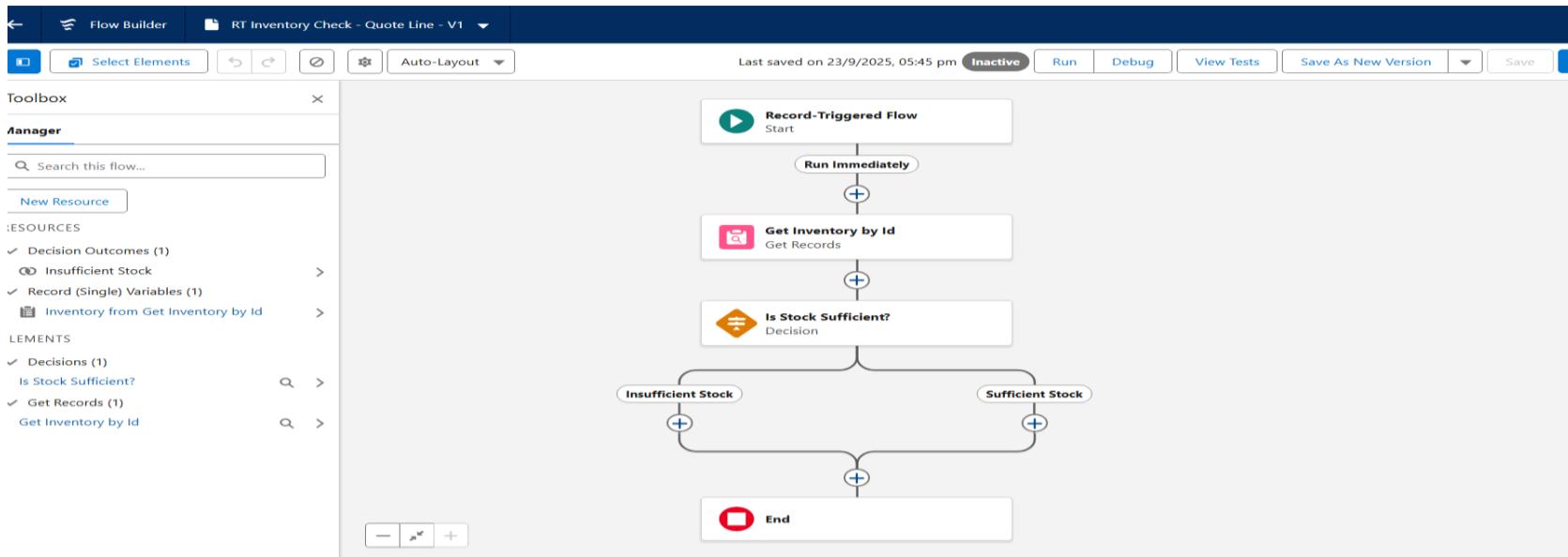
6. Add Decision element:

- If QuoteLine.Quantity > Inventory__c.Stock_Level__c → TRUE.

7. Add Action: Show Error → Use Custom Error Message:

- “Requested quantity exceeds available stock. Please adjust or backorder.”

8. Save → Activate.



C. Shipment Delay Notification (Scheduled Flow)

Goal: Check shipments daily → notify Service team if delayed.

Steps to Build:

1. Go to Setup → Flows → New Flow.

2. Select Scheduled-Triggered Flow.

3. Object: Shipment__c.

4. Schedule: Every Day at 6 AM.

5. Criteria:

- Expected_Date__c < TODAY()
- Status__c != "Shipped".

6. Add Action → Send Custom Notification:

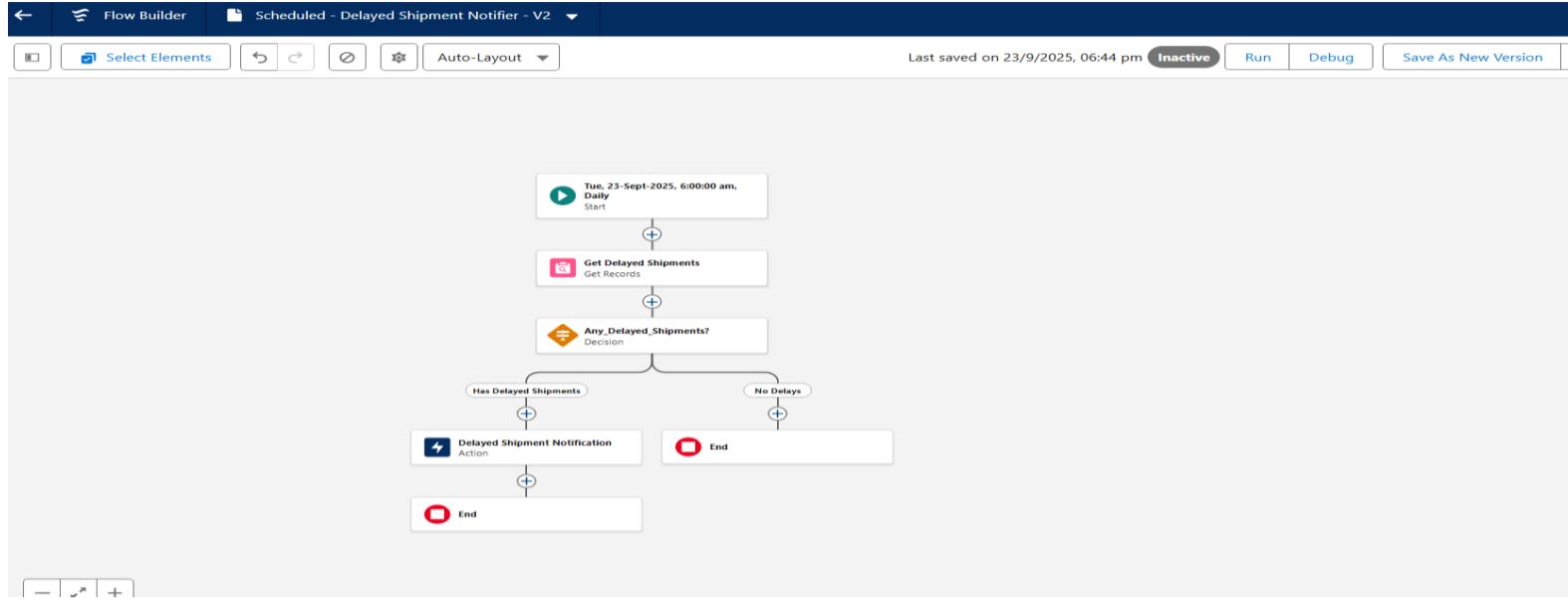
- Title: Delayed Shipment Alert
- Body: Shipment {!Shipment__c.Name} is delayed. Expected date was {!Shipment__c.Expected_Date__c}.
- Recipients: Role = Customer Service Agent.

7. Add Create Records element:

- Object: Task
- Fields: Assigned To = Customer Service Agent, Subject = "Follow up on delayed shipment".

8. Save → Activate.

9.



◆ Email Alerts

(a) Quote Approved → Email Sales Rep

1. Go to Setup → Email Alerts → New.

2. Fill:

- o Description: Quote Approved Alert
- o Object: Quote
- o Email Template: (create a simple text template: "Your quote {!Quote.Name} is approved.")
- o Recipients: Sales Rep (you can use Record Owner).
- o From Email Address: Current User.
- o Save.

Action	Description	Email Template Name	Object	Last Modified Date
Edit Del	Notify Sales Manager when Quote expires	Quote_Expired_Alert	Quote	22/09/2025
Edit Del	Notify Sales Rep when Quote is Approved	Quote_Approved_Alert	Quote	22/09/2025
Edit Del	Notify Sales Rep when Quote is Rejected	Quote_Rejected_Alert	Quote	22/09/2025
Edit Del	Quote Approved Alert	Quote_Approved	Quote	23/09/2025
Edit Del	Quote Approved Alert	Quote_Approved	Quote	23/09/2025
Edit Del	Quote Rejected	Quote_Rejected_Template	Quote	23/09/2025
Edit Del	Quote Rejected Alert	Quote_Rejected_Template	Quote	23/09/2025

◆ Custom Notifications

Custom Notifications – Add Sales Rep to Delayed Shipment Alert

Step 1: Open Your Flow

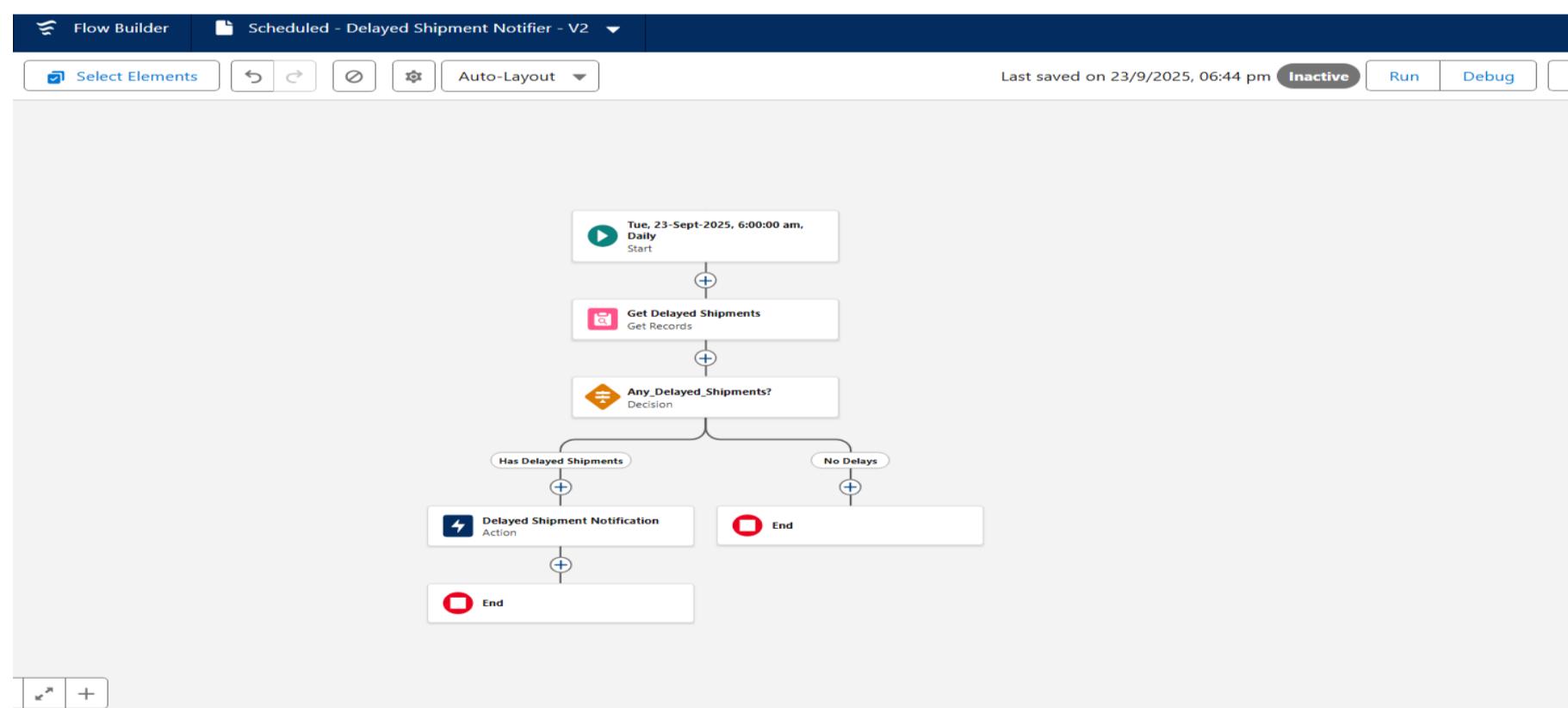
1. Setup → Flows → Scheduled Shipment Delay Flow

Step 2: Add Additional Recipients

- In the Recipients collection or Recipient field, add:
 - Sales Rep role
 - add Service Agent role as well
- 3. Add both roles in the same notification action,
- 4. Create a second notification action for the other role

Step 4: Save and Activate

- Save the flow → Activate



◆ Tasks

Auto-Create Task – Follow Up Delayed Shipments

Step 1: Open Scheduled Shipment Flow

- Go to Scheduled Flow for Shipments
- After the Custom Notification action, Create Records element

Step 2: Configure the Task Creation

- Object: Task
- Fields to set:
 - Subject: Follow up delayed shipment {!Shipment__c.Name}
 - Due Date: TODAY() + 1 (one day from now)
 - Assigned To: Customer Service Agent (you can select a queue or group member)
 - Related To: Shipment__c.Id

Step 3: Save and Activate

- Save the changes → Activate the flow
- Test by creating or simulating a delayed shipment → a Task should automatically appear for the assigned user.

Start → Get Delayed Shipments → Decision: Any_Delayed_Shipments?

 └ Has Delayed Shipments → Send Custom Notification (Sales Rep + Service Agent) →
 Create Task → End

 └ No Delays → End