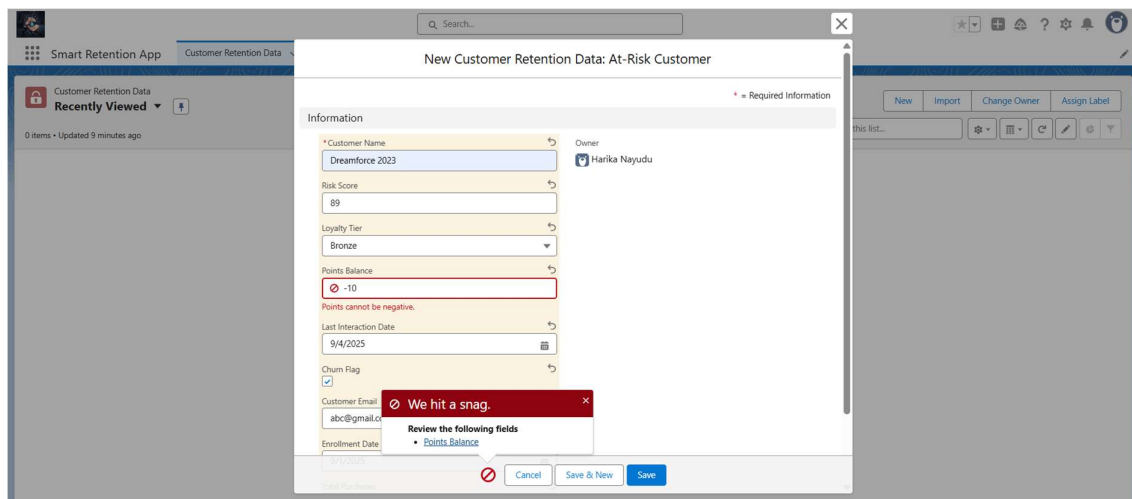
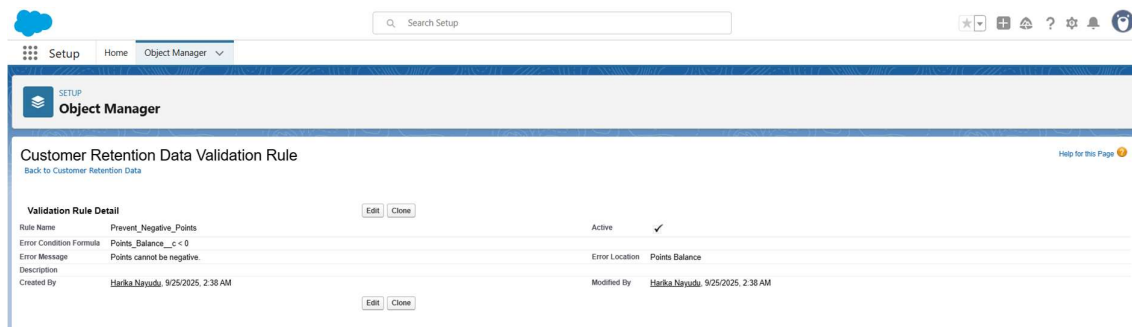


# Project Title: Smart Customer Retention & Loyalty Management System

## Phase 4: Process Automation

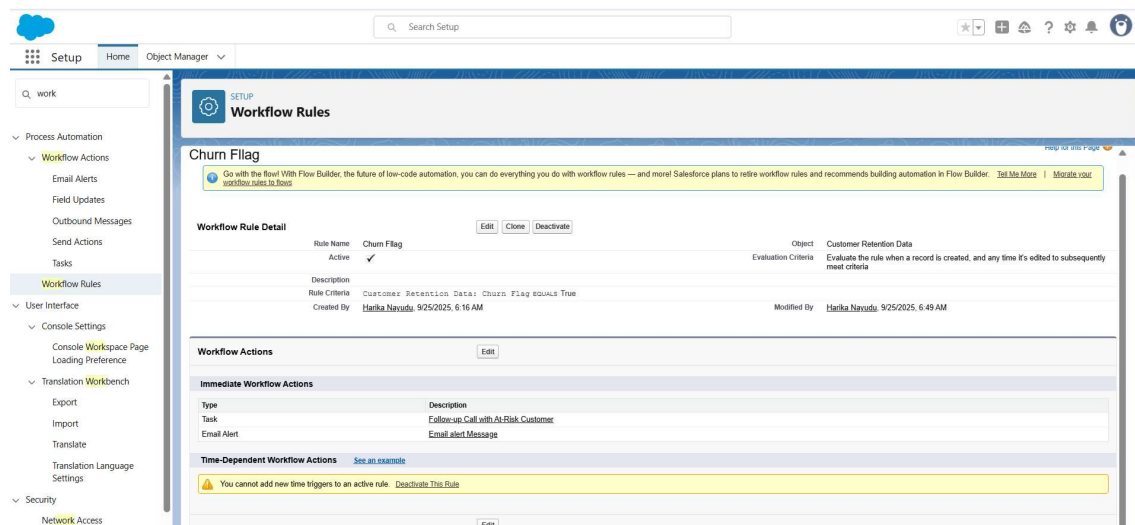
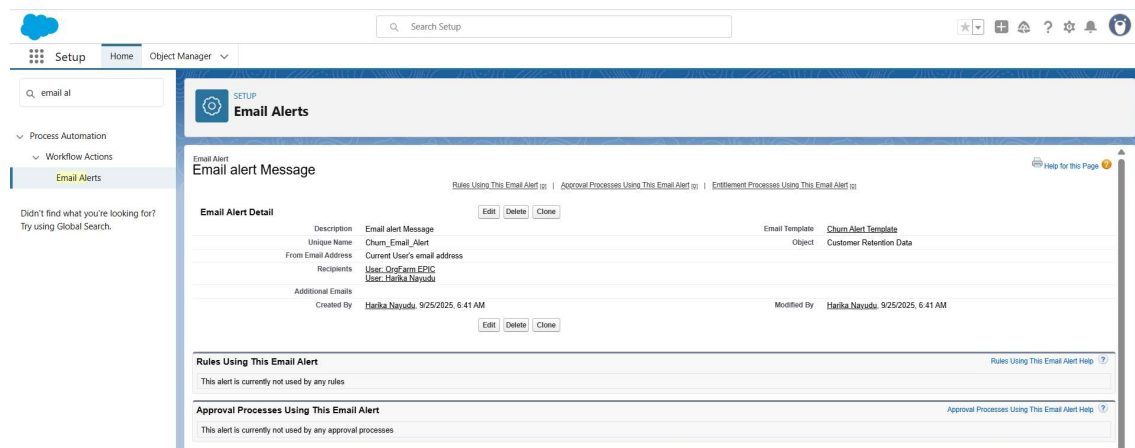
### Step 1: Validation Rules

1. Go to **Setup** → **Object Manager**.
2. Choose *Customer Retention Data* object.
3. Click **Validation Rules** → **New**.
4. Enter:
  - **Rule Name:** Prevent\_Negative\_Points
  - **Error Condition Formula:** Points\_Balance\_\_c < 0
  - **Error Message:** Points cannot be negative.
  - **Error Location:** Points\_Balance\_\_c field.
5. Save → Activate.
6. Test by trying to enter -10 points → it should block save.



## 2. Workflow Rules

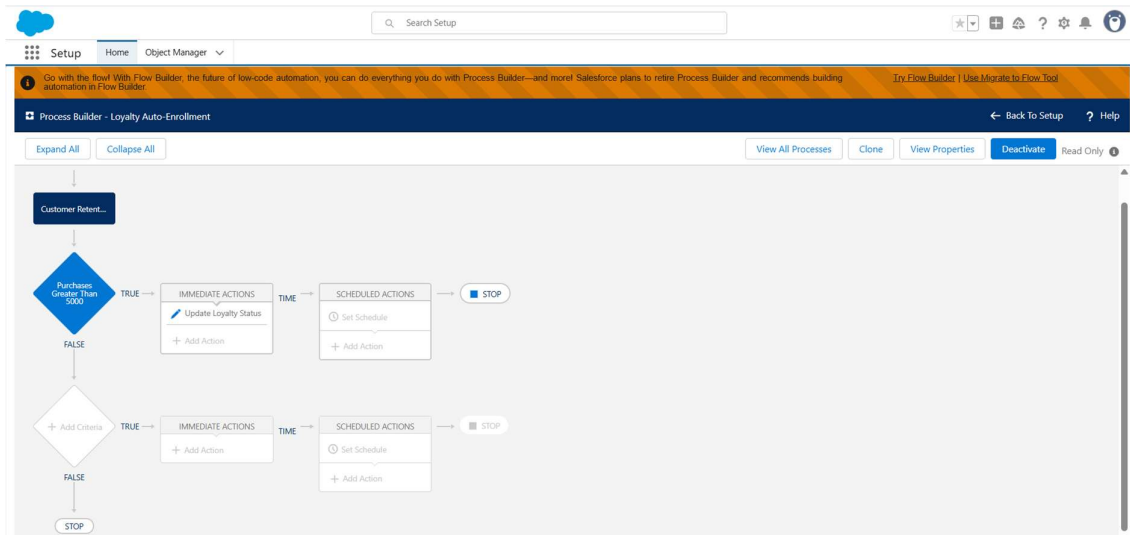
1. Navigate to **Setup** → **Workflow Rules** → **New Rule**.
2. Select object: **Customer Retention Data**.
3. Define criteria: **Churn\_Flag\_\_c = TRUE**.
4. Add actions:
  - Send **Email Alert** to Customer Success Manager.
  - Create **Follow-up Task** for churn handling.
5. Save and activate workflow.



## 3. Process Builder

1. Open **Process Builder** → **New Process**.
2. Select object: **Customer Retention Data**.
3. Define criteria: **Total\_Purchases\_\_c > 5000**.

4. Action: Update field Loyalty\_Status\_\_c = Enrolled.
5. Save and activate the process.
6. Test: (Smart Retention App → Open a Customer Retention Data record → Update Total Purchases to a value greater than 5000 (e.g., 6000) → Save the record → Check if Loyalty Status automatically changes to Enrolled)



## 4. Flow Builder

### 1. Churn Detection Flow

- Type: Record-Triggered Flow (Engagement Activity object).
- Actions:
  1. Get related Customer record.
  2. Increase Risk Score.

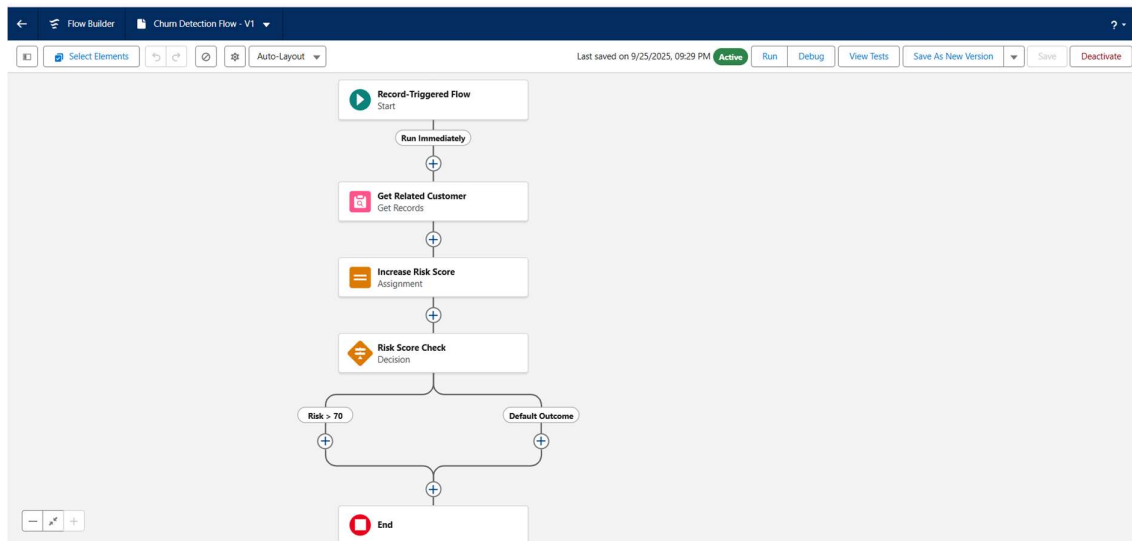
3. If Risk Score > 70 → Mark At\_Risk\_\_c = TRUE and send alert email.

## 2. Loyalty Points Flow

- Type: Record-Triggered Flow (Loyalty Transaction object).
- Actions:
  1. Fetch related Customer.
  2. Add Points\_Changed\_\_c to Points\_Balance\_\_c.
  3. Update Customer record.

## 3. Auto-Enrollment Flow

- Type: Record-Triggered Flow (Customer Retention Data).
- Condition: Total\_Purchases\_\_c > 5000 AND Loyalty\_Status\_\_c ≠ "Enrolled".
- Action: Update Loyalty\_Status\_\_c = Enrolled.



## 5. Approval Process

1. Go to **Setup** → **Approval Processes** → **New Approval Process**.
2. Select object: **Loyalty Transaction**.
3. Define criteria: Transaction\_Type\_\_c = "Redemption" AND Points\_\_c > 1000.
4. Assign approver: Manager.
5. Define outcomes:
  - On Approval → Status = Approved.
  - On Rejection → Status = Rejected.

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Approval Processes

Approval Processes

Loyalty Transaction: Loyalty Redemption Approval

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Process Definition Detail

EditCloneDeleteActivate

Active

Process Name

Loyalty\_Redemption\_Approval

Next Automated Approver Determined By

Manager of Record Submitter

Unique Name

Loyalty\_Redemption\_Approval

Description

Entry Criteria

{Loyalty Transaction: Transaction Type EQUALS Credit} AND {Loyalty Transaction: Points Changed GREATER THAN 1000}

Record Editability

Administrator ONLY

Allow Submitters to Recall Approval Requests

Approval Assignment Email Template

Initial Submitters

Loyalty Transaction Owner

Created By

Harika Nayudu 9/25/2025, 9:11 AM

Modified By

Harika Nayudu 9/25/2025, 9:11 AM

Initial Submission Actions

Add ExistingAdd New

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps

New Approval Step

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Record Lock	1	Step 1			Manager	Final Rejection

Final Approval Actions

Add ExistingAdd New

Action	Type	Description
Record Lock		Lock the record from being edited