

Phase 4: Process Automation (Admin)

In this phase, we automate different processes in Salesforce to reduce manual effort, improve accuracy, and ensure smooth workflow. The automation involves Validation Rules, Workflow Rules, Approval Process, and Flow Builder.

A. Validation Rule

Objective: Ensure data accuracy before saving a record.

Example: A booking must have a budget greater than 0 and a travel date that is not in the past.

Steps:

1. Navigate to **Setup** → in Quick Find, search for **Object Manager**.
2. Select the object (e.g., **Booking**).
3. Click on **Validation Rules** in the left panel.
4. Click **New**.
5. Enter **Rule Name:** Travel Date Validation.
6. Enter **Error Condition Formula:**

Start_Date_c < TODAY()

Enter Error Message:

"Travel date cannot be in the past.. "

7. Error Location → Start_Date_c
 8. Click **Save**.
-  Now Salesforce will prevent saving invalid bookings.

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

- Setup > OBJECT MANAGER**
- Booking**
- Validation Rule Detail** for the **Booking Validation Rule**.
- Rule Name:** Travel_Date_Validation
- Error Condition Formula:** Start_Date_c < TODAY()
- Error Message:** Travel date cannot be in the past
- Description:** (empty)
- Created By:** Yash Dighade, 9/20/2025, 9:23 PM
- Active:** checked
- Error Location:** Start_Date_c
- Modified By:** Yash Dighade, 9/20/2025, 9:23 PM

The left sidebar lists various configuration options for the Booking object.

B. Workflow Rule

Objective: Automatically send a welcome email when a new lead is created.

Steps:

1. Go to **Setup** → in Quick Find, search for **Workflow Rules**.
2. Click **New Rule**.
3. Select **Lead** object.
4. Enter Rule Name: Welcome_Email_NewLead.
5. Set **Evaluation Criteria**: Created.
6. Rule Criteria: TRUE (apply to all new leads).
7. Click **Save & Next**.
8. Under **Immediate Workflow Actions** → click **Add Workflow Action** → select **New Email Alert**.

9. Create email alert:

- Description: Welcome Lead Template
- Select Email Template (create one beforehand like “Welcome to Smart TravelConnect!”).
- Recipient: **Lead Email.**

10. Save & Activate the Workflow Rule.

Now every new lead will get an automatic welcome email.

C. Approval Process

Objective: High-value bookings (above ₹5 Lakhs) need admin approval before confirmation.

Steps:

1. Go to **Setup** → search for **Approval Processes**.
2. Click **New Approval Process** → choose **Booking** object.
3. Select **Use Jump Start Wizard**.
4. Enter Name: **High_Value_Booking_Approval**.
5. Entry Criteria: **Booking_Amount_c > 500000**.
6. Approver: **Admin User**.
7. Specify Initial Submission Actions → Lock the record.
8. Specify Final Approval Actions → Update field Status = Approved.
9. Specify Final Rejection Actions → Update field Status = Rejected.
10. Save & Activate.

Now expensive bookings need admin approval before proceeding.

D. Flow Builder (Automation with Flows)

Objective: Automate multiple emails.

Example Flow: Auto-assign leads based on region (pincode).

Steps:

1. Go to **Setup** → search for **Flows**.
2. Click **New Flow** → select **Record-Triggered Flow**.
3. Choose **Lead** object → Trigger on **Create**.
4. Click **Activate**.

Now leads get automated emails.

Flow Builder emall - V2

Last saved on 9/21/2025, 04:29 PM Active Run Debug View Tests Save As New Version Save Deactivate

```

graph TD
    Start((Record-Triggered Flow)) --> Run[Run Immediately]
    Run --> Email[Email Alert]
    Email --> End([End])
  
```

Configure Start

Select Object: Lead

Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements: All Conditions Are Met (AND)

Field	Operator	Value
Created By ID	Equals	True

+ Add Condition

When to Run the Flow for Updated Records