Phase 4 Completion Report – Process Automation (Admin)

1. Validation Rules

Validation rules were created across different objects:

Steps to Create Validation Rule :

1. Go to Setup → Object Manager → Select the required Object .
2. Navigate to Validation Rules → New Rule.
3. Enter Rule Name and Description.
4. Define the Formula (logic specific to the rule).
5. Enter the Error Message and select Error Location.
6. Save & Activate.

Repeating repeat the steps for each rule as listed above.

Example: Crop Quantity must be greater than 0

Steps:

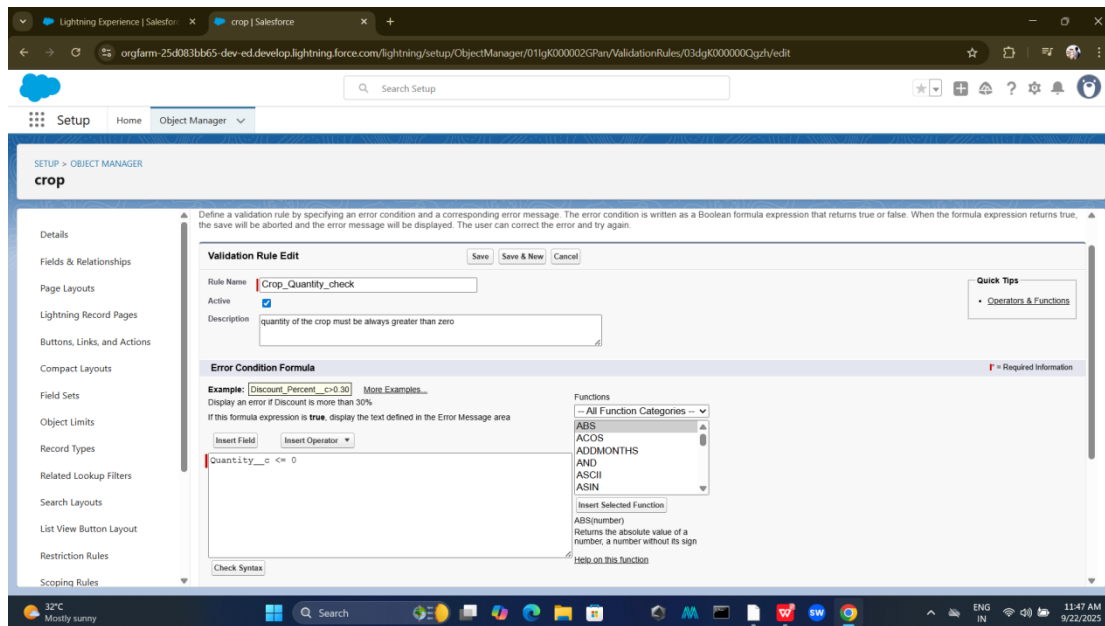> Setup → **Object Manager** → Select **Crop** → **Validation Rules**.
>
> Click **New Rule** → Enter Rule Name: `Crop_Quantity_Check`.
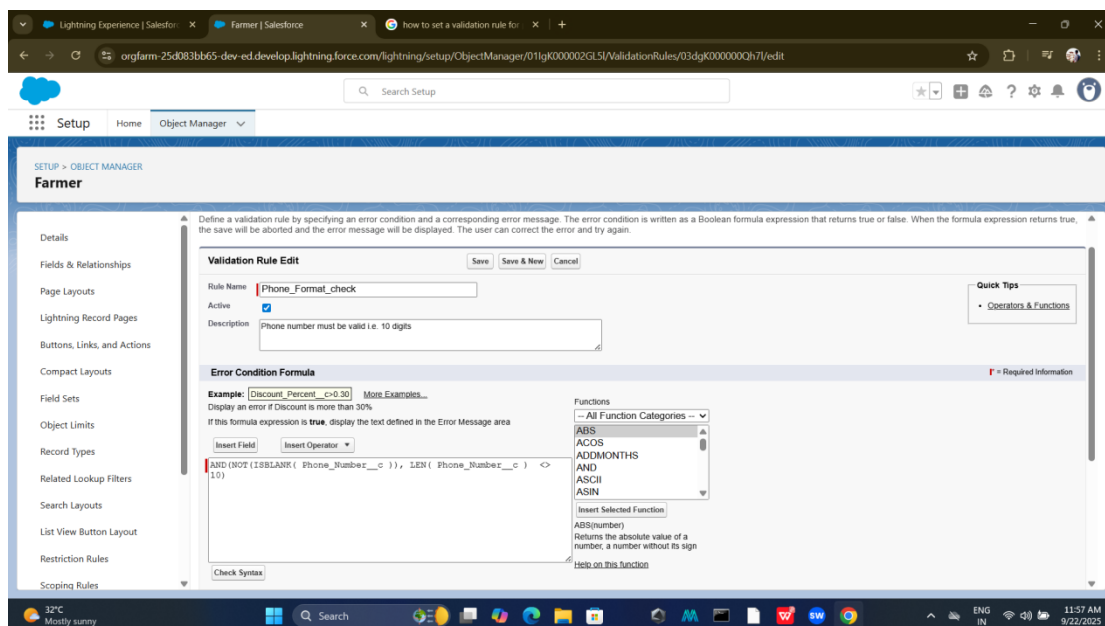>
> Formula: `Quantity__c <= 0`
>
> Error Message: "Quantity must be greater than 0."
>
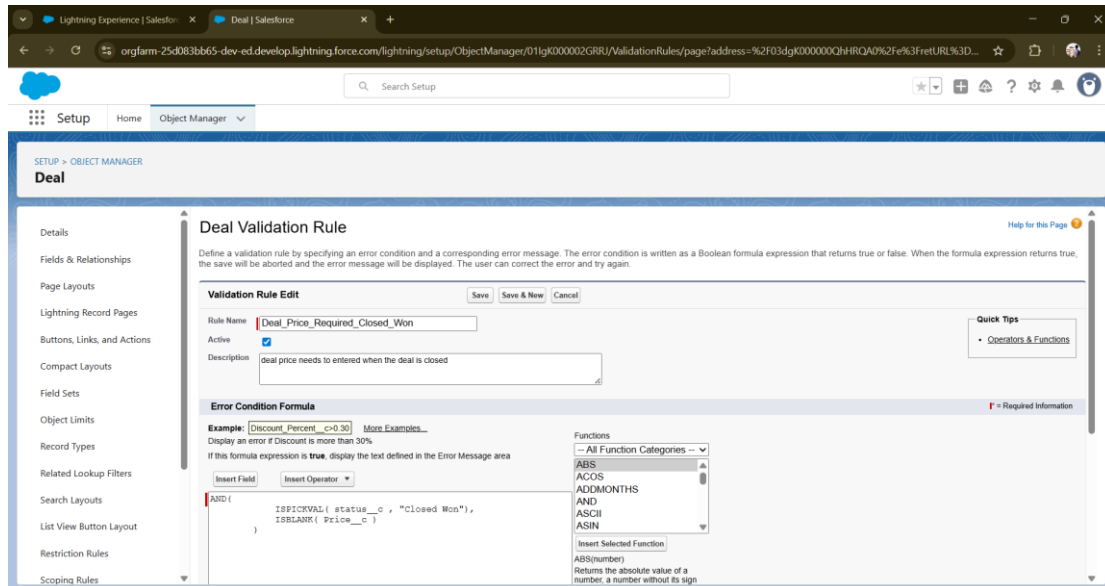> Choose where to display → *Top of Page* or *Field*.
>
> Save & Activate.

Farmer _ c Phone Number Format : (Phone number shouldn't be Null & must have 10 digits)

Deal_c Validation Rule : (Deal Price not empty when Closed Won)

2. WorkFlow Rules

Workflows perform actions when conditions are met.

□ **Example: Send Email when New Farmer is Created**
Steps:

Setup → **Workflow Rules** → New Rule.

Object: **Farmer**

Rule Criteria: `Created = True`

Add Workflow Action → **New Email Alert**

Select Email Template → "Welcome Farmer"

Recipient → Farmer Email

Activate Workflow

3. Flow Builder

Flows replace Workflow & Process Builder.

> **Record-Triggered Flow (Visit Scheduling)**

Trigger: When new Visit record is created.

Action: Send email notification to Farmer.

Steps:
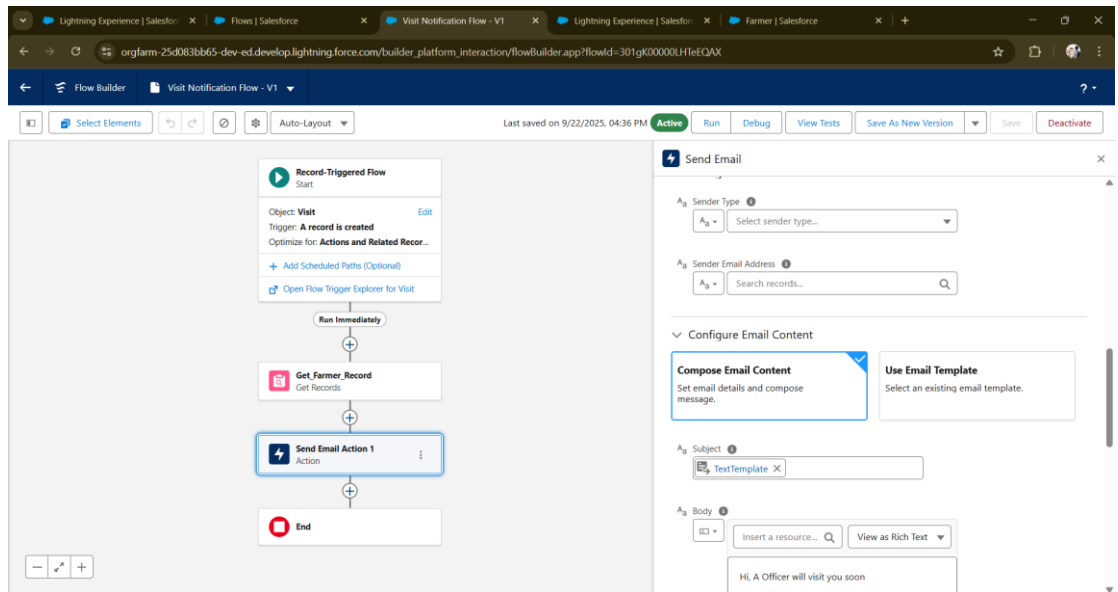
Setup → **Flows** → New Flow.

Choose **Record-Triggered Flow** → Object = Visit.

Trigger = On Create.

Add **Action** → Email Alert

Save & Activate.

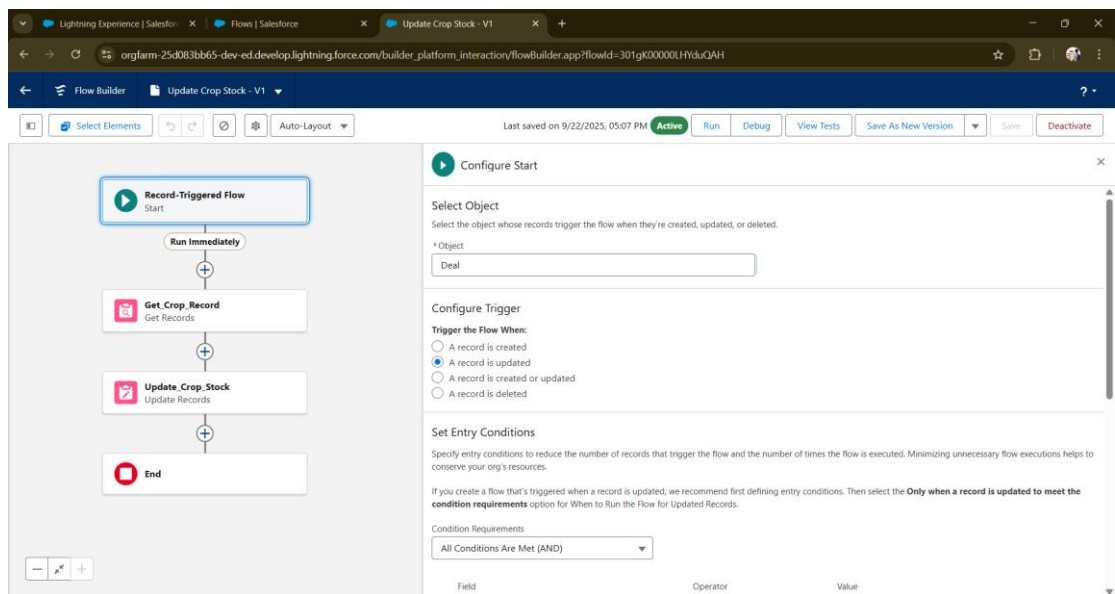## Update Crop Stock after Deal Closure

Steps:

Setup → **Flows** → New Flow.

Type: **Record-Triggered** → Object = Deal.

Trigger = When Deal Status = "Closed Won."

Add Update Records → Reduce Crop.Quantity = Crop.Quantity – Deal.Quantity.

Save & Activate.

4. Email Alerts

Email Alerts were successfully configured and activated :

Example Email : Welcome email for Farmer