

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**.

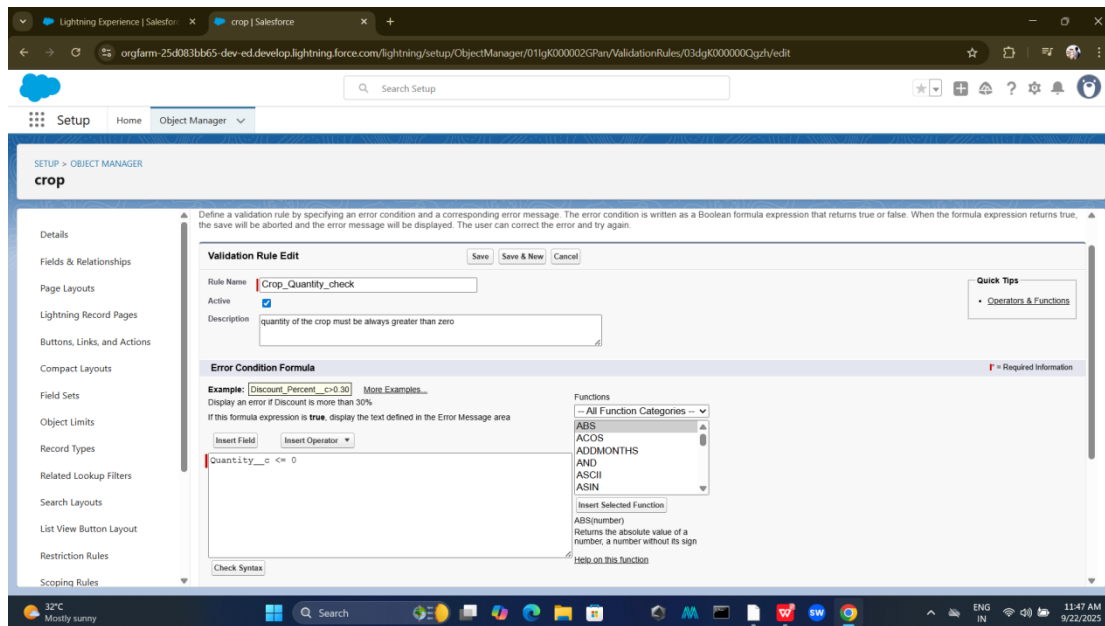
Click **New Rule** → Enter Rule Name: `Crop_Quantity_Check`.

Formula: `Quantity__c <= 0`

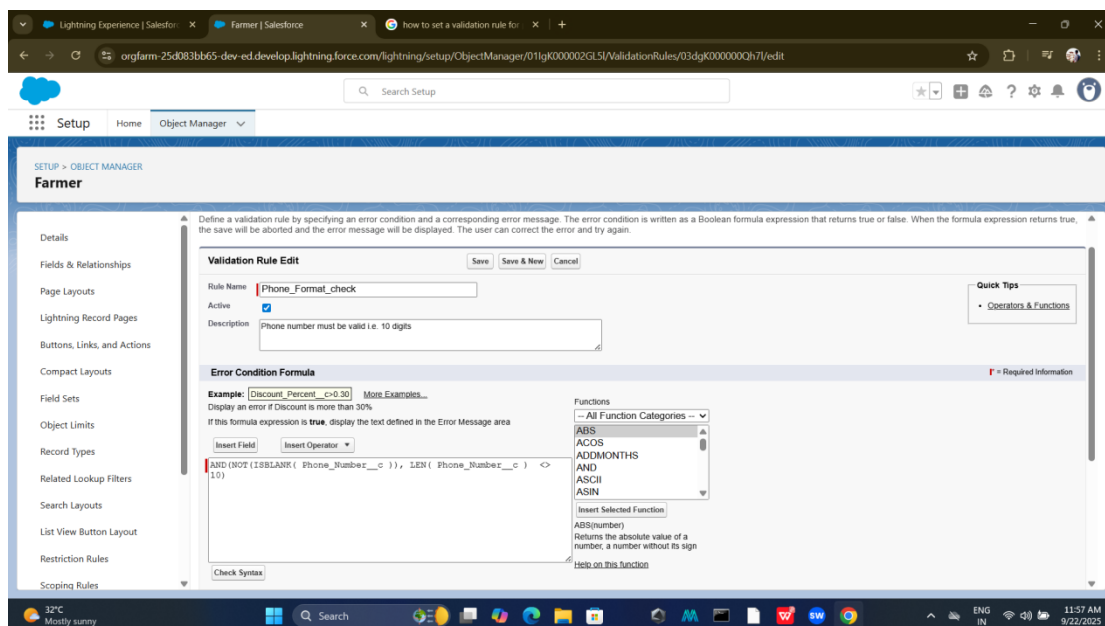
Error Message: “Quantity must be greater than 0.”

Choose where to display → *Top of Page* or *Field*.

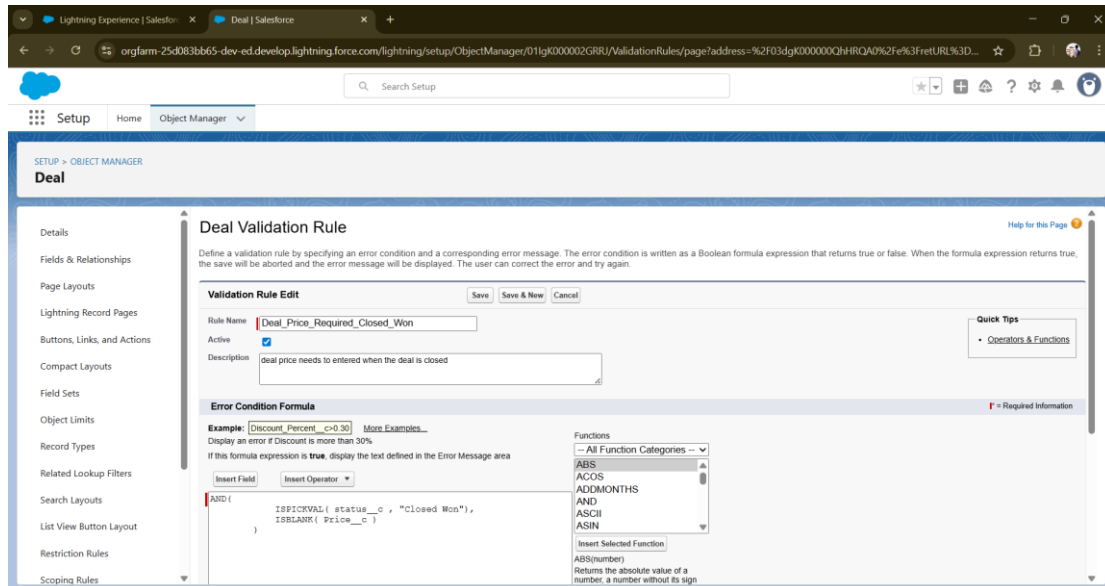
Save & Activate.



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

The screenshot shows the Salesforce Setup interface for editing a Workflow Rule. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Workflow Rules' and shows the 'Edit Rule Send Welcome to Farmer' configuration. The 'Edit Rule' section includes fields for Object (Farmer), Rule Name (Send Welcome to Farmer), and Description. The 'Evaluation Criteria' section shows the rule is triggered when a record is created. The 'Rule Criteria' section shows a table with three criteria: Farmer Farmer Name, Farmer Phone Number, and --None--.

Field	Operator	Value
1. Farmer Farmer Name	not equal to	Null
2. Farmer Phone Number	not equal to	Null
3. --None--	--None--	

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:

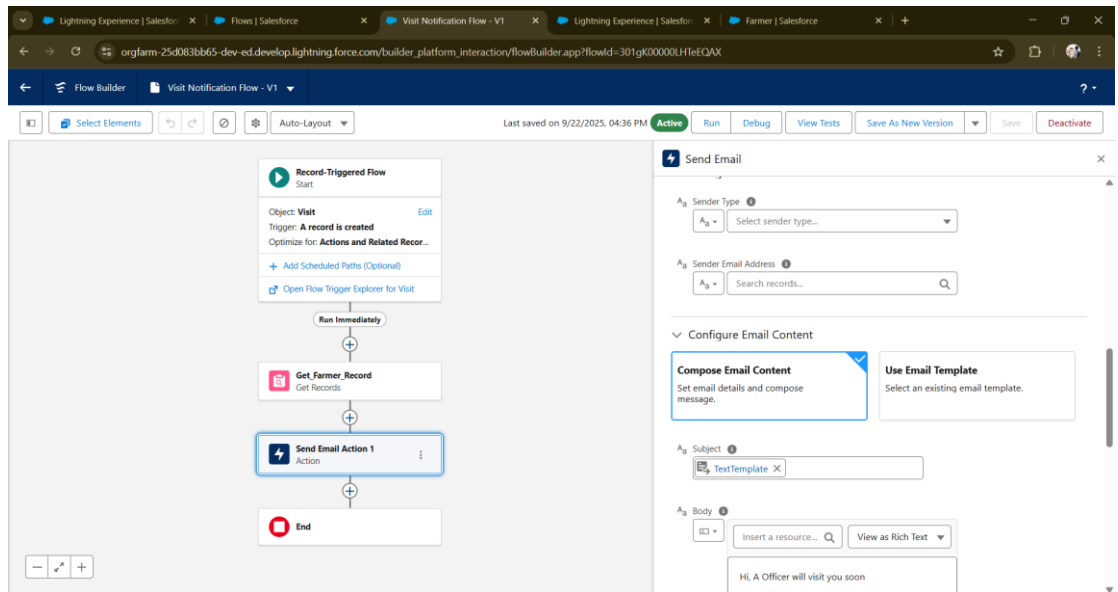
Setup → **Flows** → New Flow.

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

Trigger = On Create.

Add **Action** → Email Alert

Save & Activate.



➤ Update Crop Stock after Deal Closure

Steps:

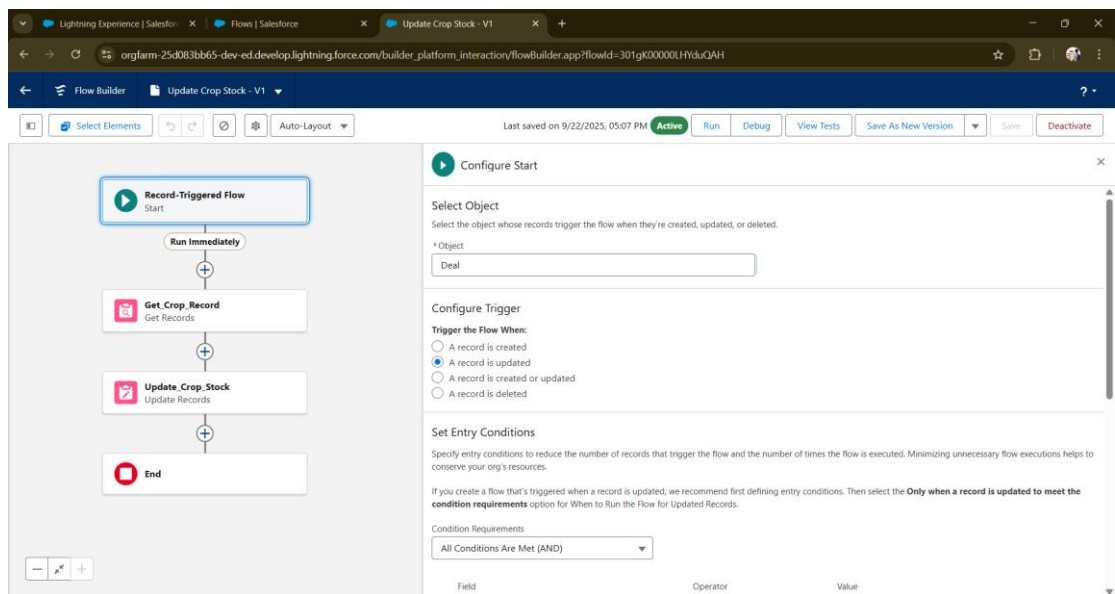
Setup → **Flows** → New Flow.

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

