Smart Leave Tracker

Phase 4: Process Automation (Admin)

1. Validation Rules

Purpose: Ensure data entered in records meets business rules.

Steps: 1. Setup → Object Manager → Leave Request → Validation Rules → New

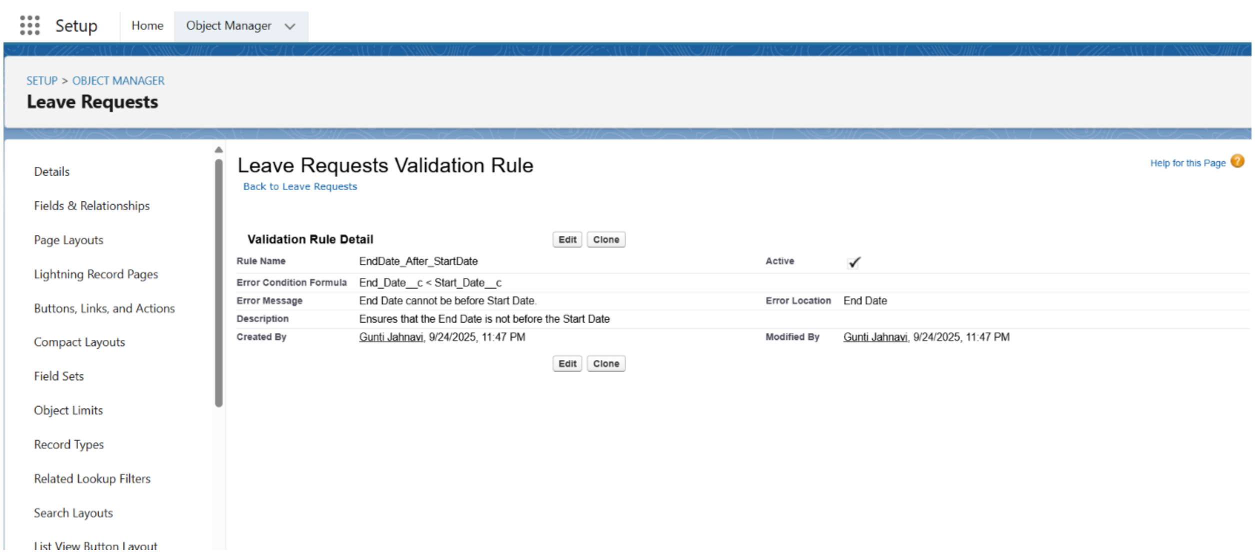
2. Enter Rule Name (e.g., Leave_End_Date_Validation)

3. Enter Error Condition Formula: `End_Date__c < Start_Date__c`

4. Enter Error Message: "End Date cannot be earlier than Start Date."

5. Choose Error Location (Field or Top of Page)

6. Save and Activate



2. Workflow Rules

Purpose: Automate actions when certain conditions are met.

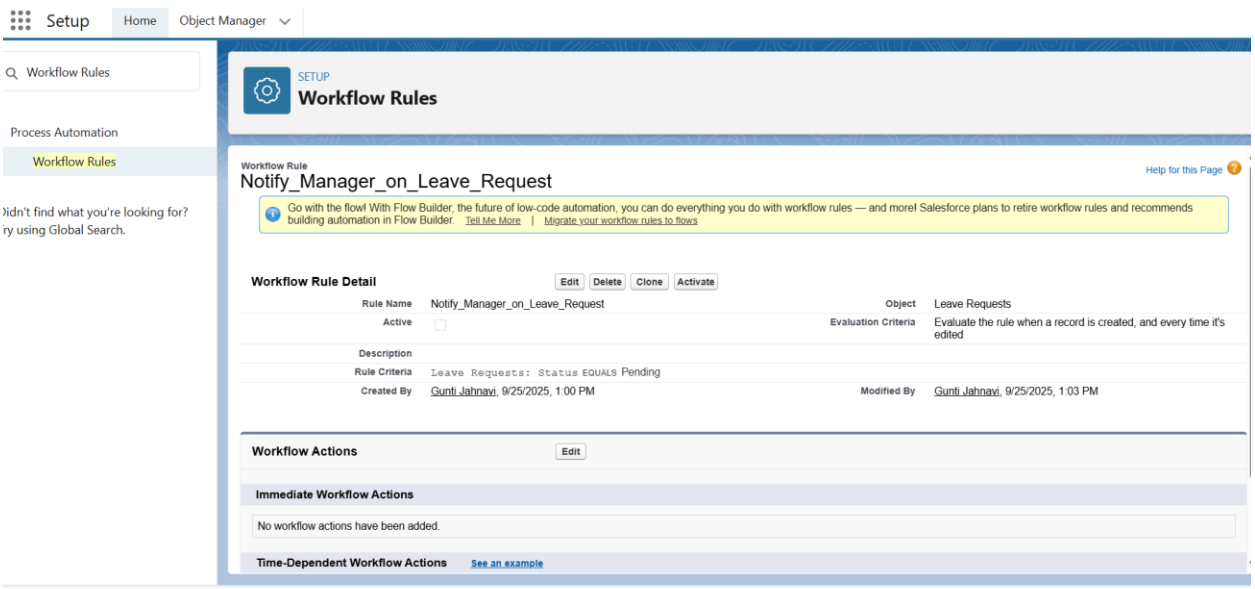
Steps: 1. Setup → Workflow Rules → New Rule → Select Object (Leave Request)

2. Enter Rule Name (e.g., Notify_Manager_on_Leave_Request)

3. Set Evaluation Criteria: created, and every time it's edited

4. Define Rule Criteria: `Status__c = 'Pending Approval'`

5. Add Workflow Action → Email Alert, Field Update, or Task 6. Save and Activate



3. Process Builder

Purpose: Automate multi-step processes with conditions.

Steps: 1. Setup → Process Builder → New

2. Enter Process Name (e.g., Leave Approval Notification)

3. Start process when a record changes 4. Select Object → Leave Request

5. Define Criteria → Status = Pending Approval

6. Add Immediate Actions → Email Alert, Field Update, Task, etc.

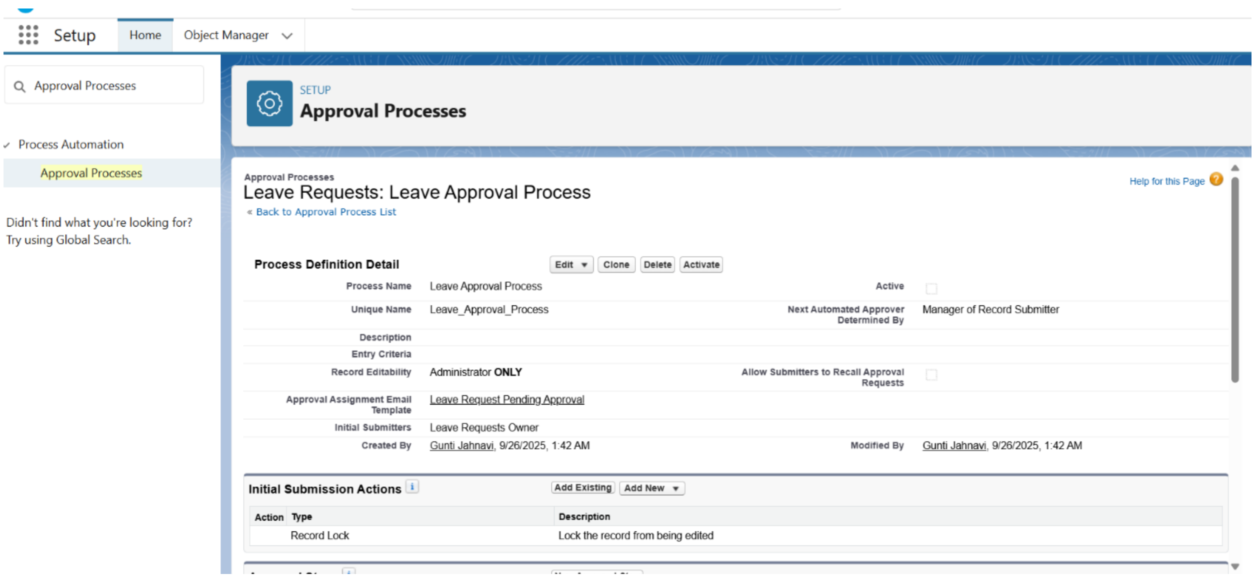
7. Save and Activate

4. Approval Process

Purpose: Automate leave approval routing.

Steps: 1. Setup → Approval Processes → Create New Approval Process → Use Standard Wizard 2. Select Object → Leave Request 3. Name the process → Leave Approval Process 4.

Define Entry Criteria → Status = Submitted 5. Assign Approver → Manager or Role-based 6. Set Approval Steps, Actions on Approval, Actions on Rejection 7. Activate

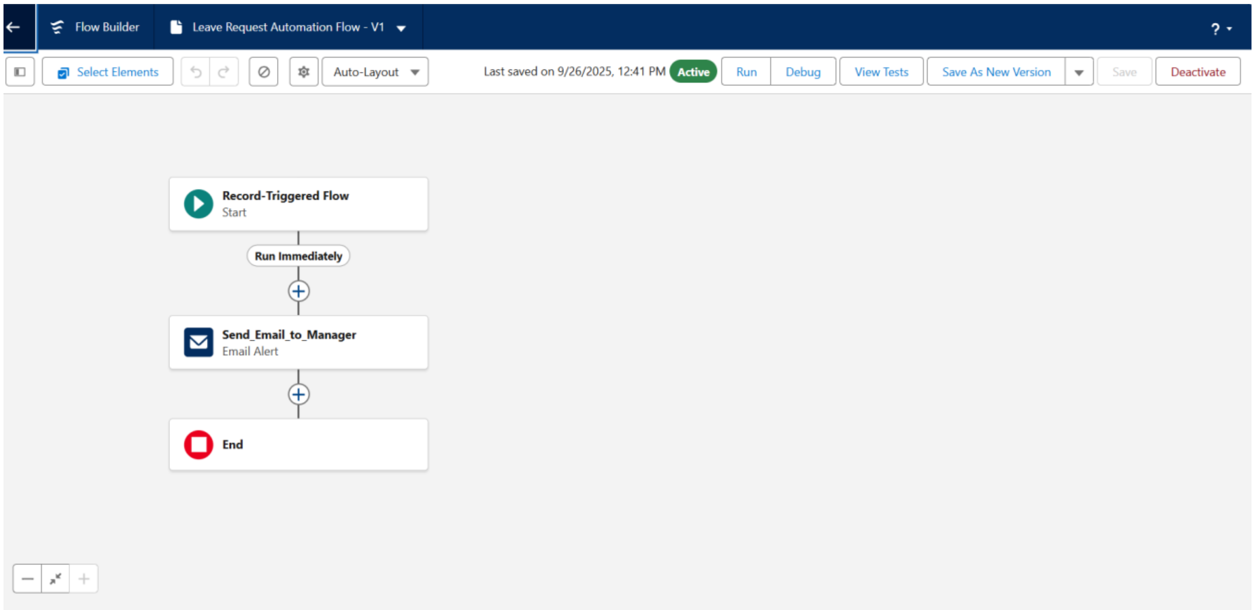


5. Flow Builder

Purpose: Automate complex logic or guided interactions.

Types: - Screen Flow: Guided step-by-step forms - Record-Triggered Flow: Runs when record is created/updated - Scheduled Flow: Runs at scheduled time - Autolaunched Flow: Runs automatically without screens

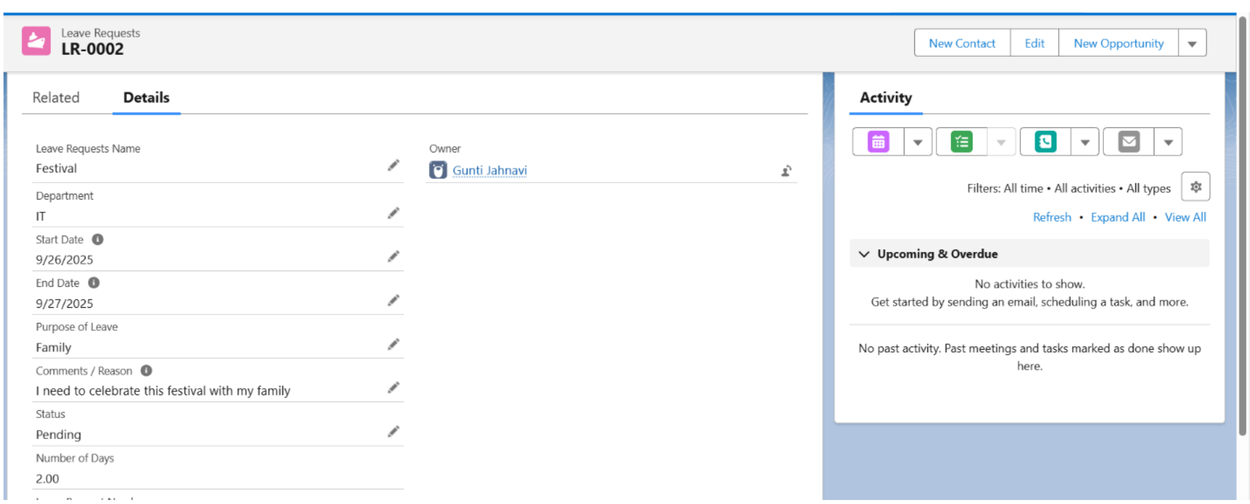
Record-Triggered Flow Example: 1. Setup → Flow → New Flow → Record-Triggered Flow 2. Select Object → Leave Request 3. Trigger When record is created or updated 4. Entry Conditions → Status = Approved 5. Add Actions → Update fields, Send Email, Create Task 6. Save and Activate



6. Email Alerts

Purpose: Notify users about important events.

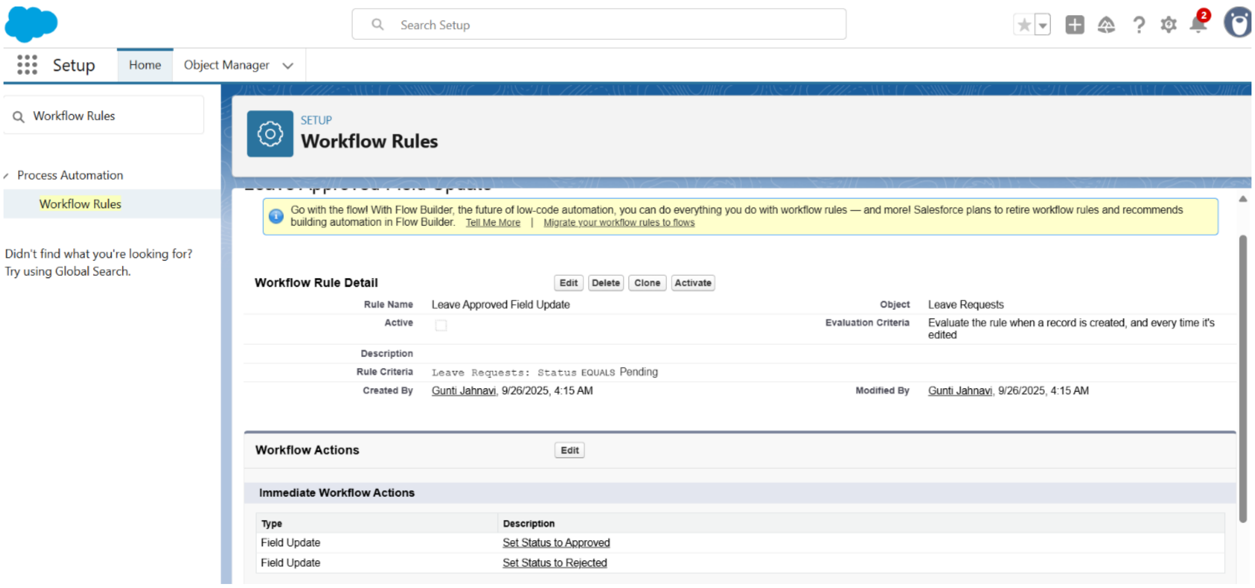
Steps: 1. Setup → Email Alerts → New Email Alert 2. Select Object → Leave Request 3. Enter Name → Leave_Approval_Notification 4. Select Email Template 5. Choose Recipients → Manager, Employee, etc. 6. Save



7. Field Updates

Purpose: Automatically update field values based on criteria.

Steps: 1. Can be created in Workflow, Process Builder, or Flow 2. Select field to update → e.g., Status = Approved 3. Set New Value → Approved 4. Save and Activate



8. Tasks

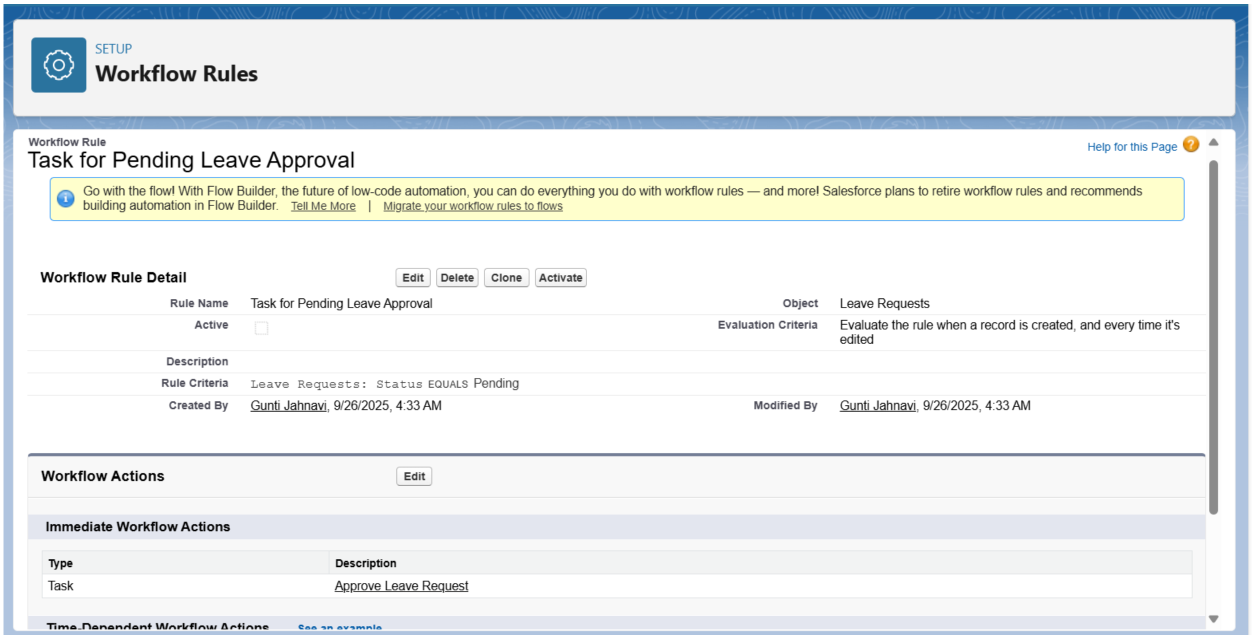
Purpose: Automatically assign tasks to users.

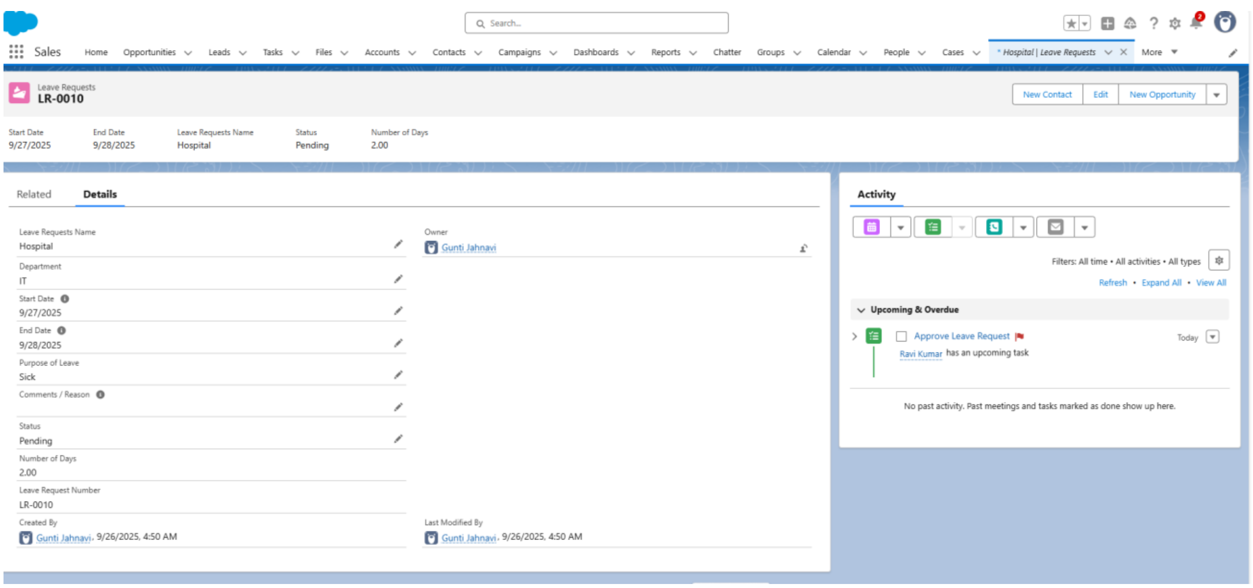
Steps: 1. Setup → Workflow/Process Builder/Flow → Add Task Action

2. Enter Task Details → Subject, Due Date, Assigned To

3. Set Trigger Conditions → e.g., leave pending approval

4. Save and Activate





9. Custom Notifications

Purpose: Send in-app notifications to users.

Steps: 1. Setup → Custom Notifications → New 2. Enter Name → Leave_Approval_Notification 3. Select Supported Channels → Desktop, Mobile 4. Create Notification Action in Process Builder or Flow 5. Define Recipients → Manager or Employee 6. Save and Activate