

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

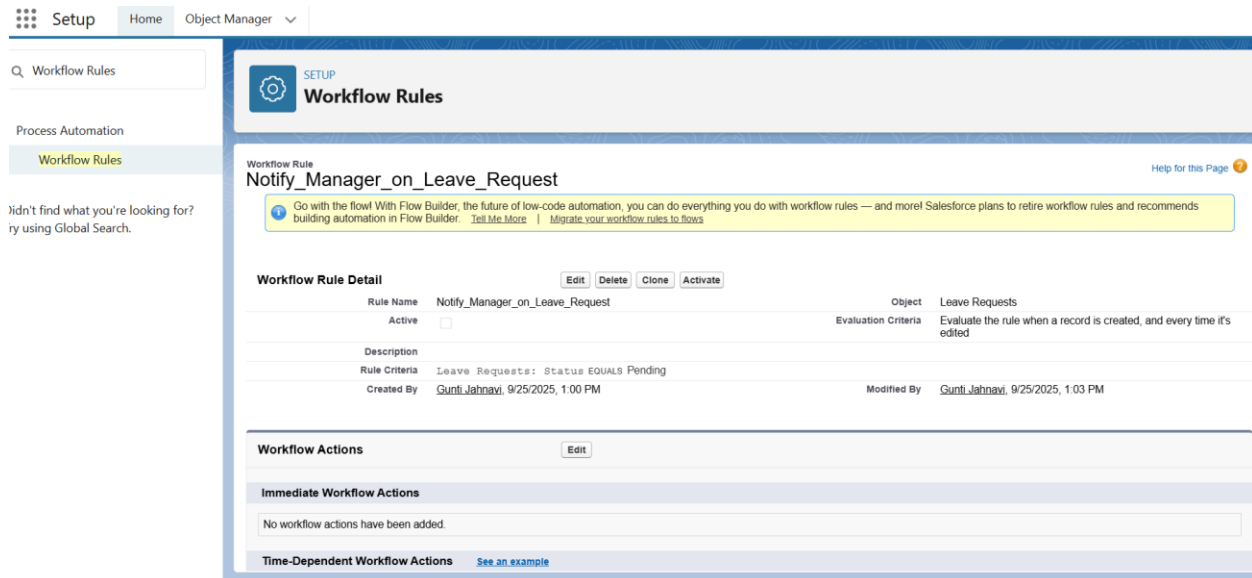
The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). Below this, the breadcrumb trail reads 'SETUP > OBJECT MANAGER' and 'Leave Requests'. The main content area is titled 'Leave Requests Validation Rule' with a 'Back to Leave Requests' link. On the left, a sidebar lists various setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The 'Details' section is expanded, showing the 'Validation Rule Detail' for the 'Leave Requests Validation Rule'. This section includes fields for 'Rule Name' (Leave_End_Date_Validation), 'Error Condition Formula' (End_Date__c < Start_Date__c), 'Error Message' (End Date cannot be before Start Date), 'Description' (Ensures that the End Date is not before the Start Date), 'Created By' (Gurli Jahnvi, 9/24/2025, 11:47 PM), and 'Modified By' (Gurli Jahnvi, 9/24/2025, 11:47 PM). There are 'Edit' and 'Clone' buttons for the rule name, description, and modified by fields. The 'Active' checkbox is checked. The 'Error Location' is set to 'End Date'. A 'Help for this Page' link is visible in the top right corner.

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

The screenshot shows the Salesforce Setup interface for Approval Processes. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar for 'Approval Processes'. The main content area is titled 'Approval Processes' and shows the configuration for 'Leave Requests: Leave Approval Process'. The configuration includes fields for Process Name, Unique Name, Description, Entry Criteria, Record Editability, Approval Assignment Email Template, Initial Submitters, and Created By. The 'Initial Submission Actions' section is also visible, showing a table with columns for Action Type and Description.

Process Definition Detail		Active
Process Name	Leave Approval Process	<input type="checkbox"/>
Unique Name	Leave_Approval_Process	Next Automated Approver Determined By: Manager of Record Submitter
Description		
Entry Criteria		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests: <input type="checkbox"/>
Approval Assignment Email Template	Leave Request Pending Approval	
Initial Submitters	Leave Requests Owner	
Created By	Gurli Jahnavi, 9/26/2025, 1:42 AM	Modified By: Gurli Jahnavi, 9/26/2025, 1:42 AM

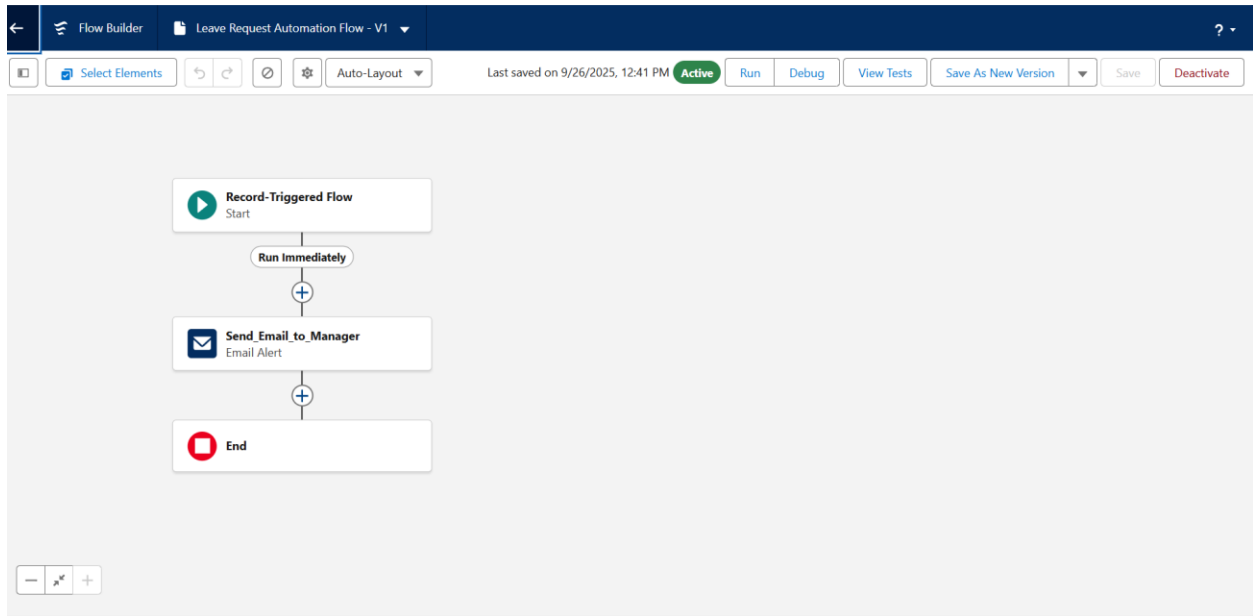
Action	Type	Description
Record Lock		Lock the record from being edited

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

Leave Requests
LR-0002

New Contact Edit New Opportunity

Related	Details
Leave Requests Name	Festival
Department	IT
Start Date	9/26/2025
End Date	9/27/2025
Purpose of Leave	Family
Comments / Reason	I need to celebrate this festival with my family
Status	Pending
Number of Days	2.00

Activity

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

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

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Workflow Rules, Process Automation, and Workflow Rules. The main content area is titled 'Workflow Rules' and displays a list of rules. The first rule, 'Leave Approved Field Update', is selected and its details are shown. The details include the Rule Name, Object (Leave Requests), Evaluation Criteria (Evaluate the rule when a record is created, and every time it's edited), Description (Leave Requests: Status EQUALS Pending), Rule Criteria (Leave Requests: Status EQUALS Pending), Created By (Gurli Jahnvi), and Modified By (Gurli Jahnvi). Below the details, there is a section for 'Workflow Actions' with an 'Edit' button. Underneath, the 'Immediate Workflow Actions' are listed in a table.

Type	Description
Field Update	Set Status to Approved
Field Update	Set Status to Rejected

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


Workflow Rules

Workflow Rule

Task for Pending Leave Approval

Help for this Page

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail

Edit Delete Clone Activate

Rule Name	Task for Pending Leave Approval	Object	Leave Requests
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and every time it's edited
Description			
Rule Criteria	Leave Requests: Status EQUALS Pending		
Created By	Gunti Jahnavi, 9/26/2025, 4:33 AM	Modified By	Gunti Jahnavi, 9/26/2025, 4:33 AM

Workflow Actions


Edit

Immediate Workflow Actions


Type	Description
Task	Approve Leave Request

Time-Dependent Workflow Actions

See an example



Q Search...

 Sales
 Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases

Hospital | Leave Requests

Leave Requests

LR-0010

New Contact Edit New Opportunity





Start Date	End Date	Leave Requests Name	Status	Number of Days
9/27/2025	9/28/2025	Hospital	Pending	2.00

Related

Details

Leave Requests Name	Hospital	Owner	Gunti Jahnavi
Department	IT		
Start Date	9/27/2025		
End Date	9/28/2025		
Purpose of Leave	Sick		
Comments / Reason			
Status	Pending		
Number of Days	2.00		
Leave Request Number	LR-0010		
Created By	Gunti Jahnavi, 9/26/2025, 4:50 AM	Last Modified By	Gunti Jahnavi, 9/26/2025, 4:50 AM

Activity

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

Approve Leave Request

Ravi Kumar has an upcoming task

Today

No past activity. Past meetings and tasks marked as done show up here.

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

