

◆ Phase 4: Process Automation

Step 1: Validation Rules

Validation Rules stop users from saving wrong or incomplete data.

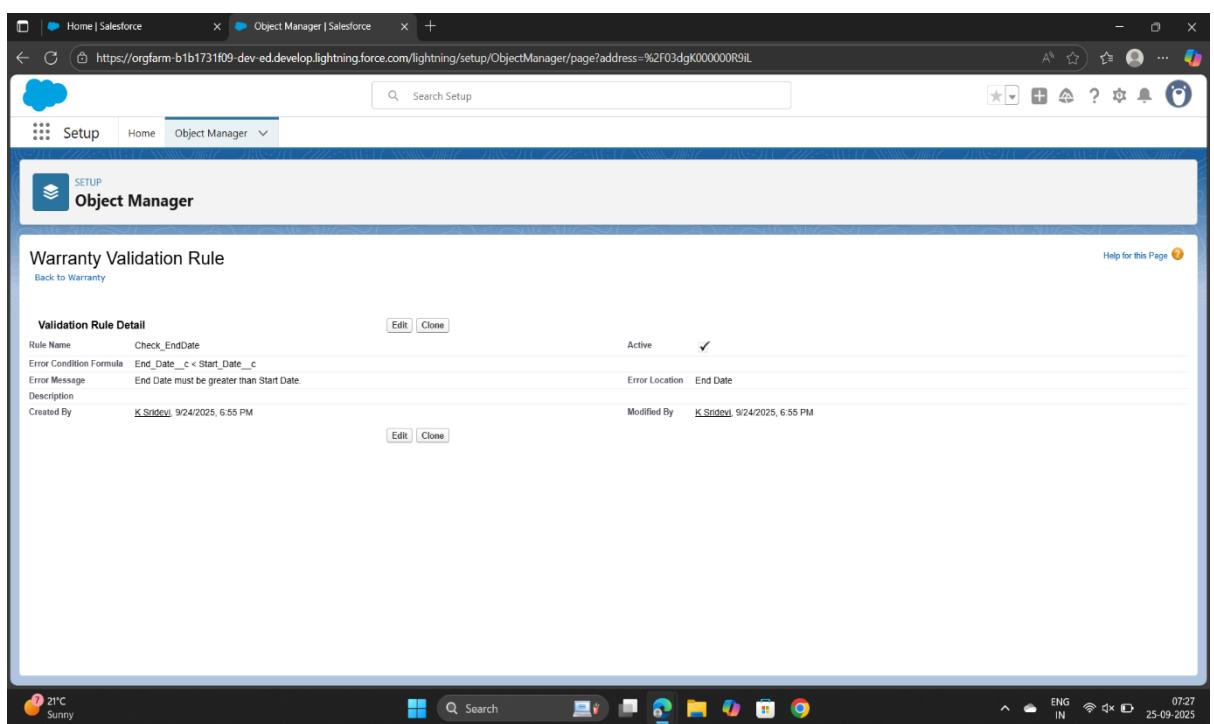
A. Warranty Dates Validation

Goal: End Date must be greater than Start Date.

- Go to **Setup** → **Object Manager** → **Warranty__c** → **Validation Rules** → **New**.
- Rule Name: **Check_EndDate**
- Formula:

`End_Date__c < Start_Date__c`

- Error Message: **“End Date must be greater than Start Date.”**
- Error Location: Field → End Date.
- Save.



B. Service Request → Issue Description Required

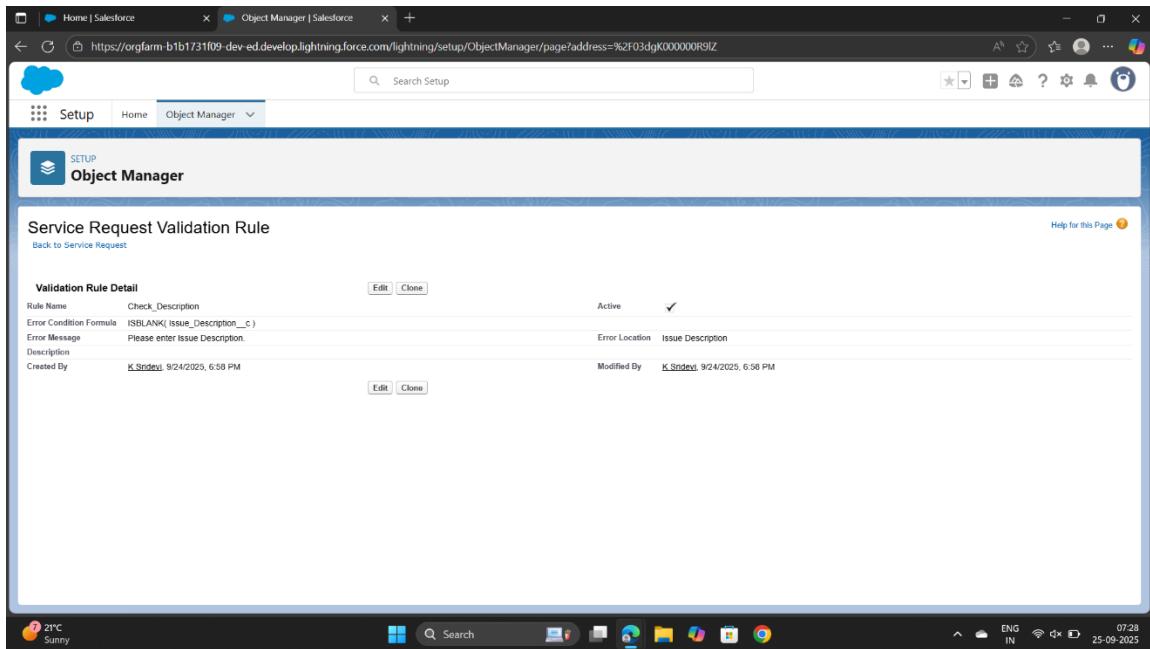
Goal: Every Service Request must have a description.

- Go to **Setup** → **Object Manager** → **Service_Request__c** → **Validation Rules** → **New**.
- Rule Name: **Check_Description**

- Formula:

ISBLANK(Issue_Description__c)

- Error Message: “**Please enter Issue Description.**”
- Error Location: Field → Issue Description.
- Save.



Step 2: Workflow Rule + Email Alert

Workflow Rule automates actions when criteria is met.

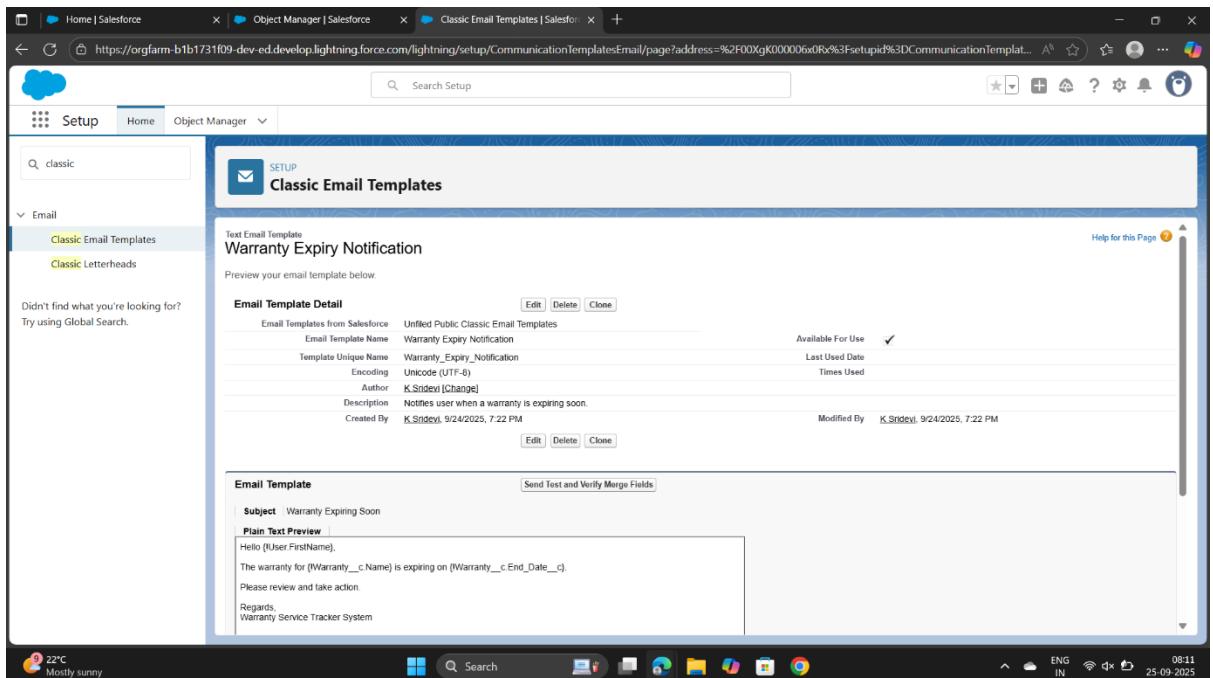
Example: Notify when Warranty is Expiring

- Setup → Workflow Rules → New Rule.
- Object: **Warranty__c**.
- Rule Name: Warranty_Expiry_Alert.
- Evaluation: “created, and every time it’s edited”.
- Rule Criteria: End_Date__c = TODAY() + 30
(means warranty expiring in 30 days).

Action → Email Alert

- Create Email Template:
 - Setup → Classic Email Templates → New.
 - Folder: Unfiled Public.

- Template Name: Warranty Expiry Notification.
 - Subject: Warranty Expiring Soon.
 - Body: “Warranty for {!Warranty__c.Name} is expiring on {!Warranty__c.End_Date__c}.”
- Back to Workflow → Add Action → Email Alert → choose template + recipient (Owner/User).
- Activate Rule.

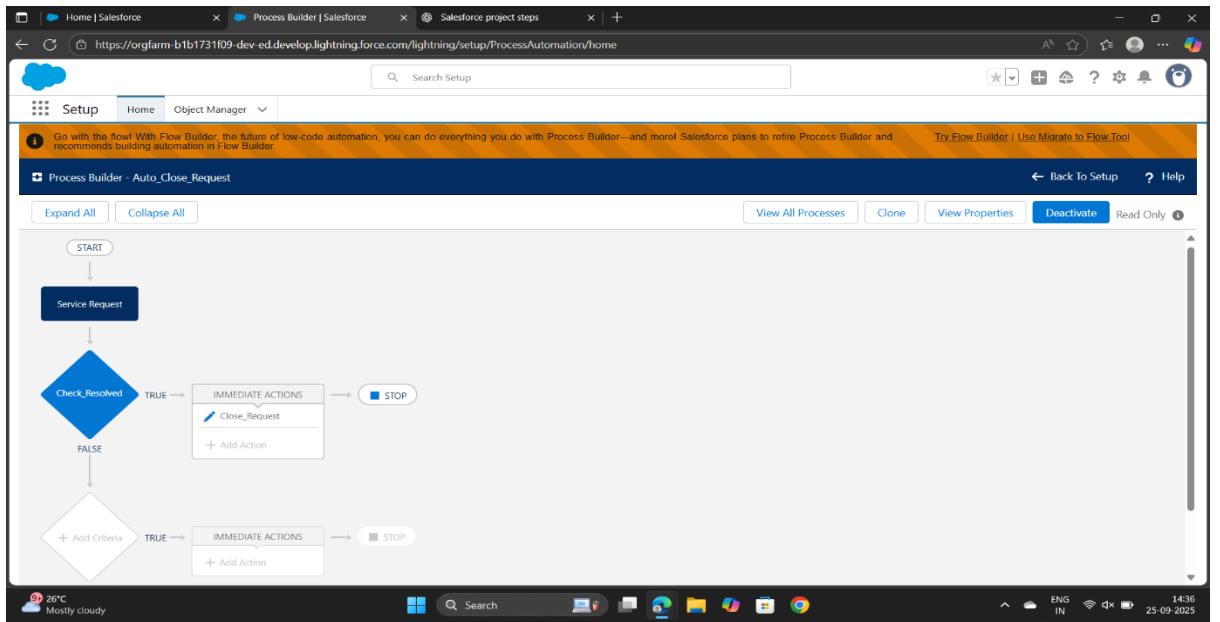


Step 3: Process Builder Automation

Process Builder automates record updates or actions.

Example: Auto-update Service Request Status

- Setup → Process Builder → New.
- Name: Auto_Close_Request.
- Object: **Service_Request__c**.
- Trigger: “when record is created or edited”.
- Criteria: Resolved__c = TRUE (checkbox field, you can create it if not already).
- Action: Update field → Status = “Closed”.
- Activate Process.

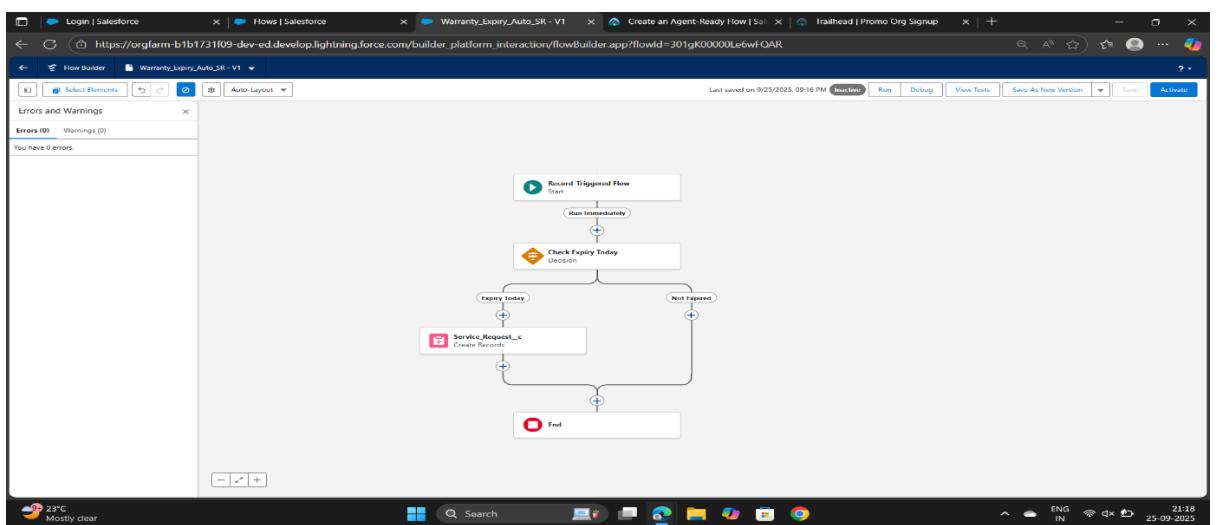


Step 4: Record-Triggered Flow

Flows are more advanced automation.

Example: Auto-Create Service Request on Warranty Expiry

- Setup → Flows → New Flow.
- Choose: **Record-Triggered Flow**.
- Object: **Warranty__c**.
- Trigger: When record is updated → condition: End_Date__c = TODAY().
- Action: Create Records → New Service_Request__c.
 - Fields: Name = “Auto-Generated Expiry Request”, Status = “Open”, Product = Warranty.Product__c.
- Save & Activate.



Step 5: Approval Process

Approval Processes let managers approve/reject records.

Example: Approve Service Request Over Certain Amount

- Setup → Approval Processes → New Approval Process.
- Object: **Service_Request__c**.
- Name: HighCost_Approval.
- Entry Criteria: `Estimated_Cost__c > 10000`.
- Approver: Role → Manager (or a specific user).
- Final Action on Approval: Update field → Status = “Approved”.
- Final Action on Rejection: Update field → Status = “Rejected”.
- Save & Activate.

