

Phase 4: Process Automation (Elaborate Version)

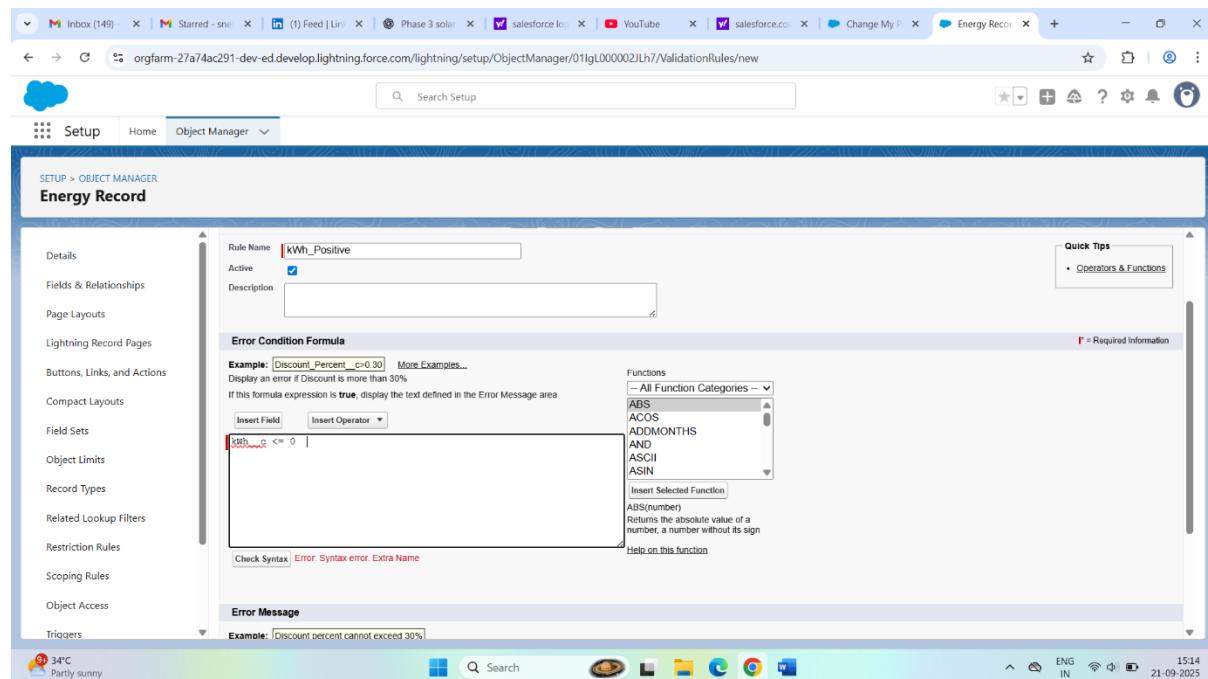
👉 **Goal:** Make Salesforce do repetitive work automatically — keep data clean, calculate totals, send alerts, and handle approvals.

1. Validation Rules (keep data clean)

Example: Energy Record kWh must be greater than 0.

Steps:

1. Go to **Setup** → **Object Manager** → **Energy Record** → **Validation Rules**.
2. Click **New**.
3. Fill in:
 - o **Rule Name:** Positive_kWh
 - o **Error Condition Formula:**
 - o $kWh_c \leq 0$
 - o **Error Message:** Energy must be greater than 0
 - o Location: choose field **kWh**.
4. Click **Save**.

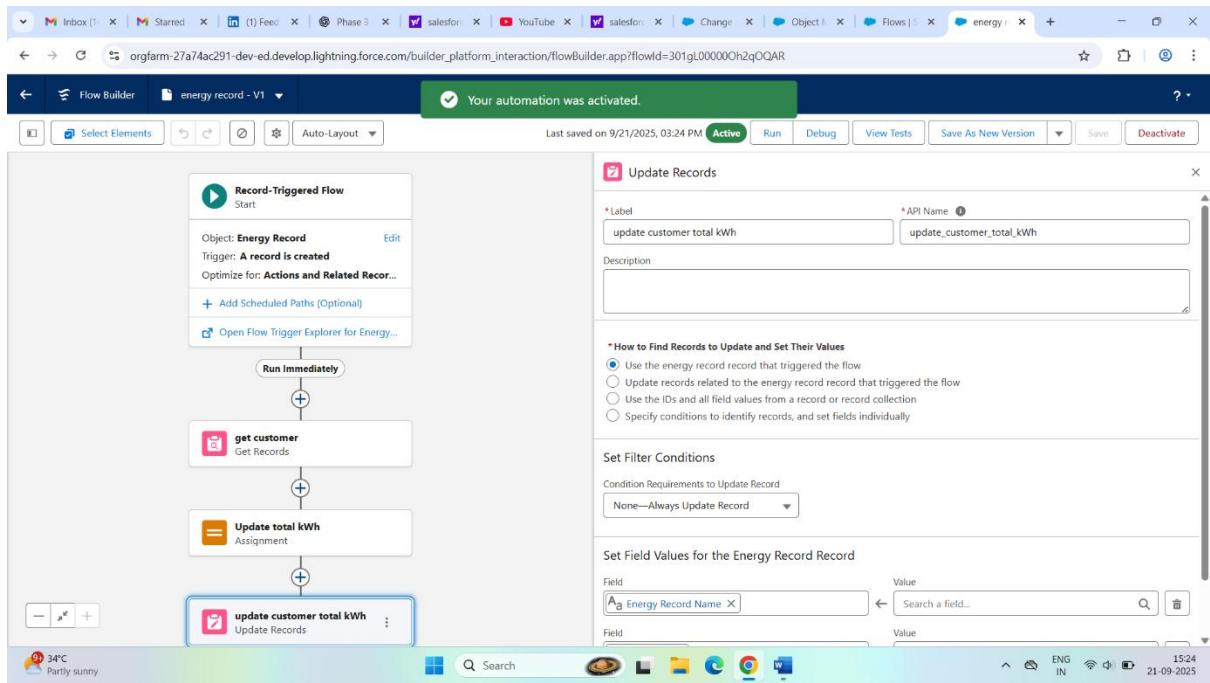


2. Flows (automate totals & updates)

Example: Update Customer's Total kWh automatically when an Energy Record is added.

Steps:

1. Go to **Setup** → **Flows**.
2. Click **New Flow** → **Record-Triggered Flow**.
3. Configure:
 - Object: **Energy Record**
 - Trigger: **When record is created**
 - Run: **After Save** (so you can update other records).
4. Click + **Add Element** → **Get Records**.
 - Label: Get Customer
 - Object: **Account**
 - Condition: Id = `{!$Record.Customer__c}`
 - Store first record.
5. Click + **Add Element** → **Assignment**.
 - Label: Update Total kWh
 - Variable: `{!Customer.Total_kWh__c} =`
`{!Customer.Total_kWh__c} + {!$Record.kWh__c}`
6. Click + **Add Element** → **Update Records**.
 - Record: Customer from Get Records.
 - Field: Total kWh = assigned value.
7. Save → Label: Update Customer Total kWh → Activate.

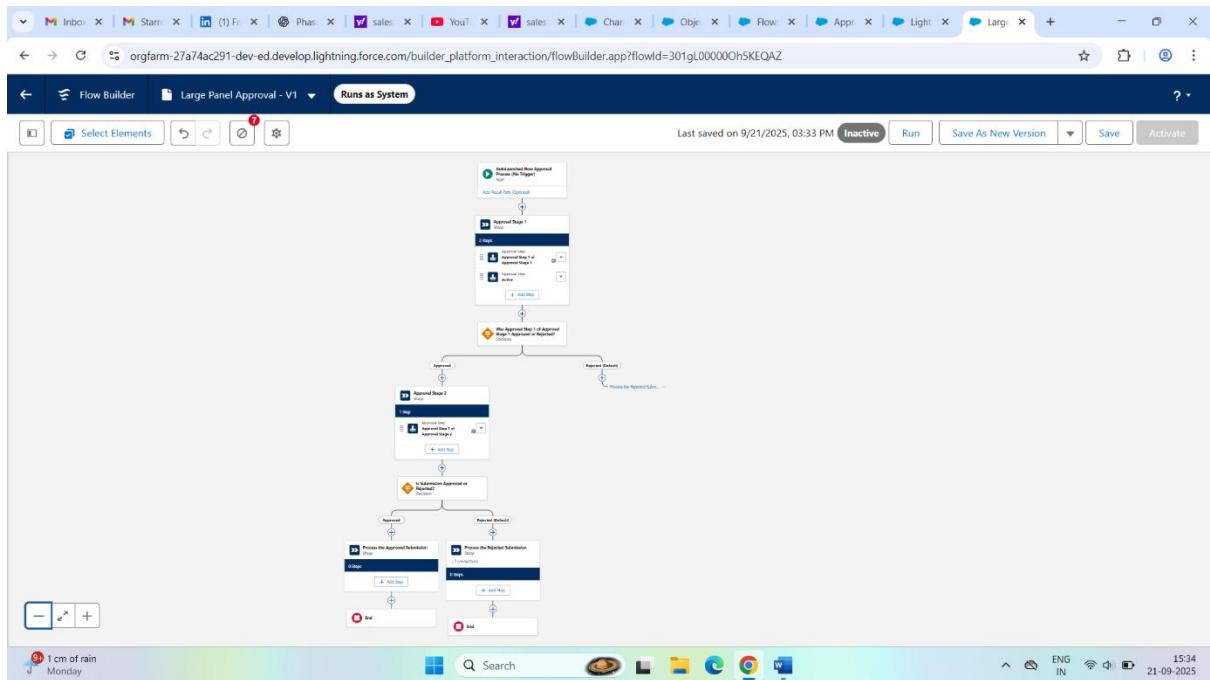


3. Approval Process (for expensive/large panels)

Example: If Solar Panel capacity > 10 kW, manager must approve before status is “Active”.

Steps:

1. Setup → **Approval Processes** → choose object **Solar Panel**.
2. Click **New Approval Process** → **Jump Start Wizard** (easy mode).
3. Enter Name: Large Panel Approval.
4. Criteria: Capacity_c > 10.
5. Select Approver: choose a Manager user.
6. Final Actions:
 - On Approval → Update field Status = Active.
 - On Rejection → Update field Status = Pending.
7. Save → Activate.

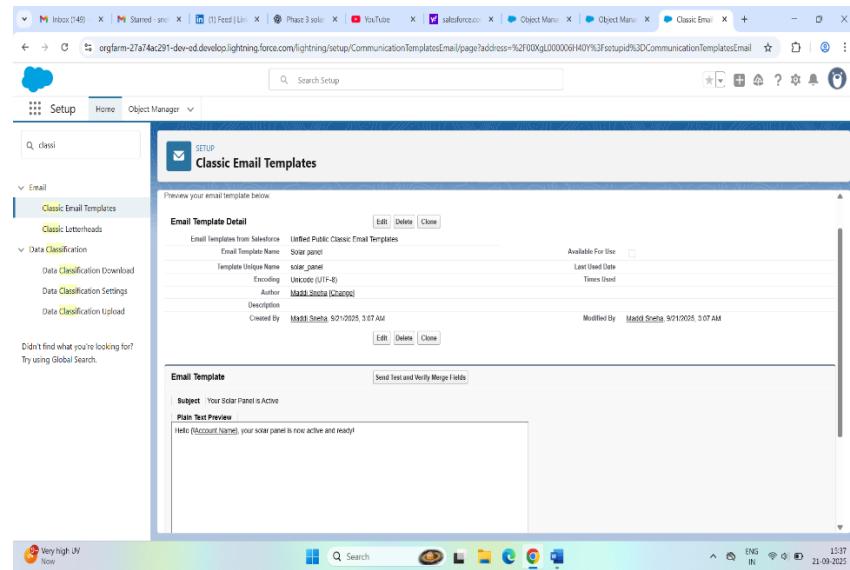


4. Email Alerts (auto-send emails)

Example: Notify customer when their panel is installed (status = Active).

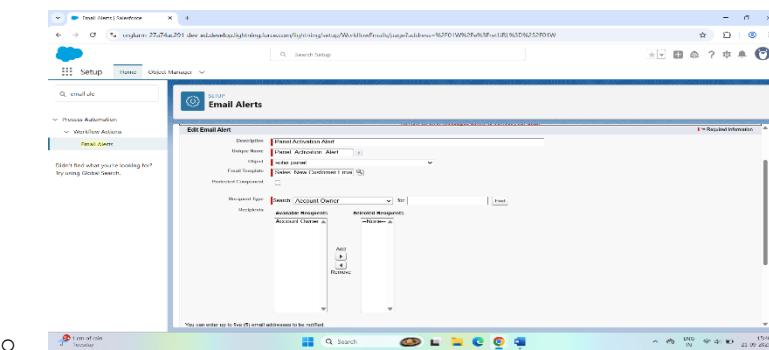
Steps:

1. Setup → **Classic Email Templates** → New Template.
 - Choose Text (simple).
 - Subject: Your Solar Panel is Active
 - Body: Hello {!Account.Name}, your solar panel is now active and ready!
 - Save.



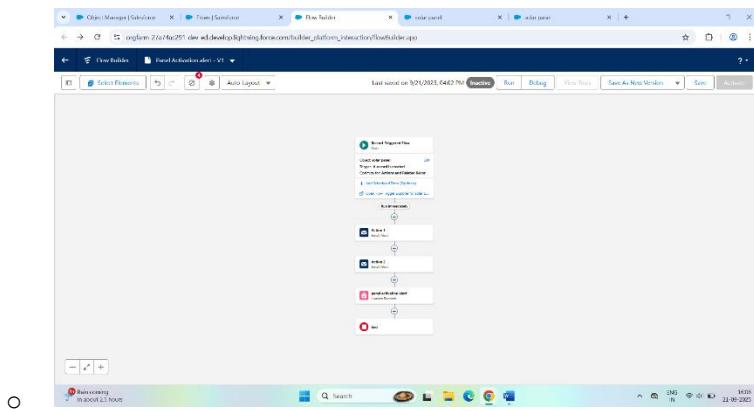
2. Setup → Email Alerts → New.

- Description: Panel Activation Alert
- Object: **Solar Panel**
- Recipient: **Account Email** (lookup through Customer field).
- Template: the one you just made.
- Save.



3. Now create a Flow:

- Trigger: Solar Panel record updated.
- Condition: Status = Active.
- Action: **Send Email Alert** → select Panel Activation Alert.
- Save & Activate.



5. Custom Notifications (for Salesforce users)

Example: Notify an internal Agent if a panel produces more than 100 kWh in one record.

Steps:

1. Setup → Notifications → **Custom Notifications** → New.
 - Label: High Production Alert.
 - Channels: Desktop & Mobile.
 - Save.
2. Setup → Flows → **New Record-Triggered Flow**.
 - Object: **Energy Record**
 - Trigger: **When record is created**.
 - Condition: `kWh__c > 100`.
3. In Flow, Add Action: **Send Custom Notification**.
 - Notification Type: High Production Alert.
 - Recipient: choose a specific user or the record owner.
 - Message: "High production detected: {!\$Record.kWh__c} kWh".
 - Save & Activate.

