

Phase 4: Process Automation (Admin)

In this phase, we automate different processes in Salesforce to reduce manual effort, improve accuracy, and ensure smooth workflow. The automation involves Validation Rules, Workflow Rules, Approval Process, and Flow Builder.

A. Validation Rule

Objective: Ensure data accuracy before saving a record.

Example: A donation record must have an amount greater than 0 and a donation date that is not in the past.

Steps:

1. Navigate to **Setup** → in Quick Find, search for **Object Manager**.
2. Select the object (e.g., **Donation**).
3. Click on **Validation Rules** in the left panel.
4. Click **New**.
5. Enter **Rule Name:** Donation_Date_Validation.
6. Enter **Error Condition Formula:**

Donation_Amount__c <= 0

Enter Error Message:

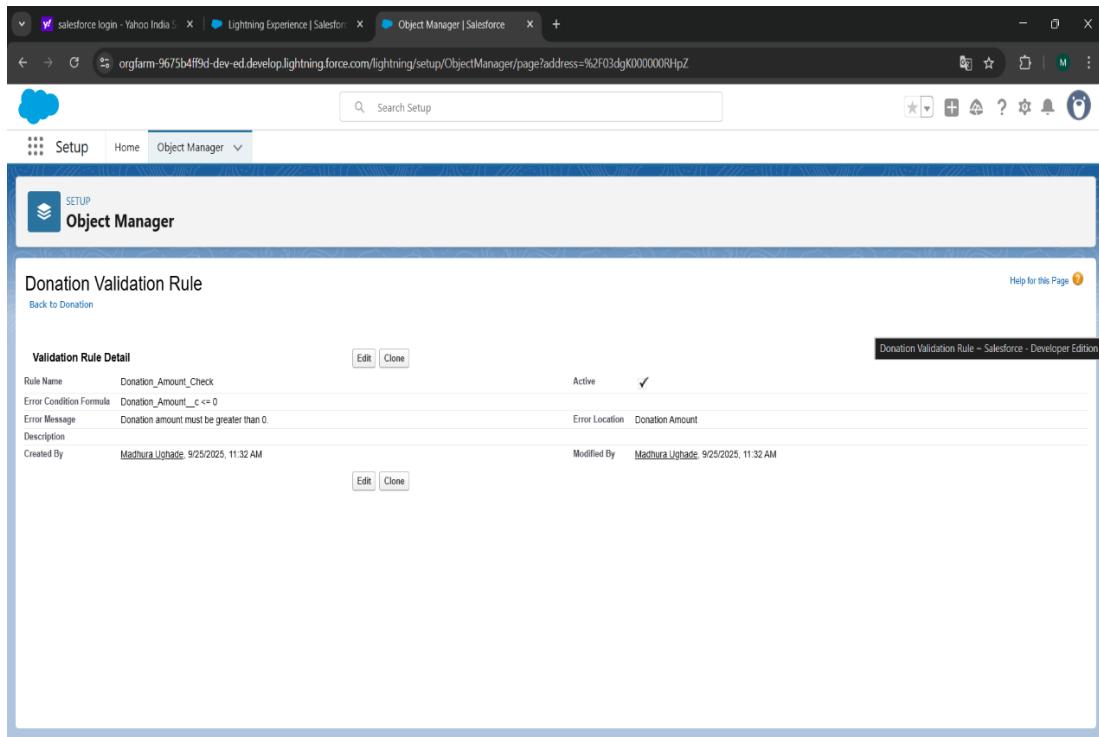
“Donation date cannot be in the past and

amount must be greater than 0 .”

Error Location ⑦ **Donation_Date_c**

8. Click **Save**.

Now Salesforce will prevent saving invalid donation records.



B. Workflow Rule

Objective: Automatically send a welcome email when a new lead is created.

Steps:

1. Go to **Setup** → in Quick Find, search for **Workflow Rules**.
2. Click **New Rule**.
3. Select **Donation** object.
4. Enter Rule Name: **Thank_You_Email_NewDonation**.
5. Set **Evaluation Criteria**: **Created**.
6. Rule Criteria: **TRUE** (apply to all new leads).
7. Click **Save & Next**.
8. Under **Immediate Workflow Actions** → click **Add Workflow Action** → select **New Email Alert**.

9. Create email alert:

- Description: Thank You Donation Template
- Select Email Template (create one beforehand like “Thank You for your Donation !”). ○ Recipient: **Donor Email**.

10. Save & Activate the Workflow Rule.

Now every new donation will get an automatic welcome email.

C. Approval Process

Objective: Donation above Rs.1,00,000 requires admin approval before confirmation.

Steps:

1. Go to **Setup** → search for **Approval Processes**.
2. Click **New Approval Process** → choose **Donation** object.
3. Select **Use Jump Start Wizard**.
4. Enter Name: **High_Value_Donation_Approval**.
5. Entry Criteria: **Donation_Amount_c > 100000**.
6. Approver: **Admin User**.
7. Specify Initial Submission Actions → Lock the record.
8. Specify Final Approval Actions → Update field Status = Approved.
9. Specify Final Rejection Actions → Update field Status = Rejected.
10. Save & Activate.

High-value donations require admin approval before proceeding.

D. Flow Builder (Automation with Flows)

Objective: Automate multiple tasks for NGO.

Example Flow: Auto-assign donors to regional coordinators based on state.

Steps:

1. Go to **Setup** → search for **Flows**.
2. Click **New Flow** → select **Record-Triggered Flow**.
3. Choose **Donation** object → Trigger on **Create**.
4. Click **Activate**.

Now leads get automated emails.

