

## Phase 4: Process Automation (Admin)

### Project Title: GoldenEra Enterprises CMR

#### 1• Validation Rules

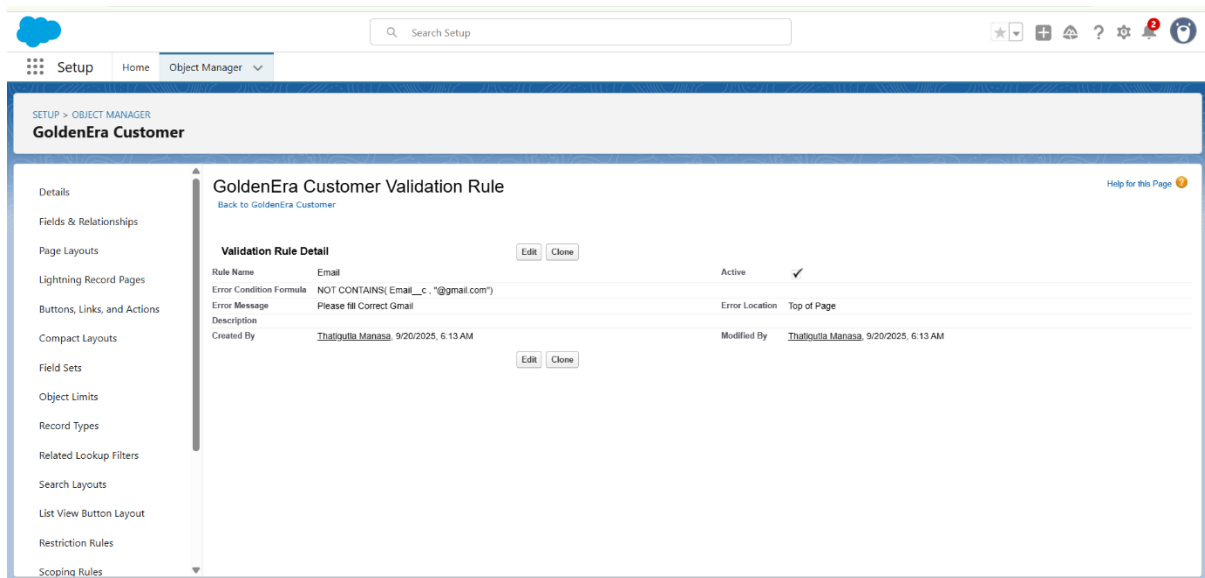
Validation Rules ensure that the data entered into Salesforce records meets specific business criteria. They prevent incorrect or inconsistent data from being saved.

##### Examples for GoldenEra Enterprises:

- GoldenEra Order\_\_c: Total\_Amount\_\_c <= 0
  - Error Message: “Please Enter Correct Amount”
  - Ensures orders have a positive total amount.
- Inventory\_\_c: Stock\_Quantity\_\_c <= 0
  - Error Message: “Inventory count cannot be less than zero”
  - Prevents stock from being negative.
- GoldenEra Customer\_\_c: NOT(CONTAINS(Email, "@gmail.com"))
  - Error Message: “Please fill Correct Gmail”
  - Ensures customer email follows a valid format.

##### Steps to create a validation rule:

1. Setup → Object Manager → Select the Object → Validation Rules → New.
2. Enter Rule Name, Error Condition Formula, and Error Message.
3. Choose error location (Field or Top of Page) → Save.



## 2. Workflow Rules

Workflow Rules automate standard internal processes. They can trigger Email Alerts, Field Updates, Tasks, or Outbound Messages when record conditions are met.

### Example for GoldenEra Enterprises:

- When Inventory\_\_c.Stock\_Quantity\_\_c < 5, send an email alert to the Inventory Manager.
- When GoldenEra\_Order\_\_c.Status\_\_c = Confirmed, update a field Order\_Confirmed\_\_c to true.

## 3.Process Builder

Process Builder allows multi-step automation beyond what workflow rules can do. It can:

- Update related records
- Post to Chatter
- Launch Flows or Apex
- Send Email Alerts

### Example for GoldenEra Enterprises :

- When Total\_Purchases\_\_c of a customer exceeds 1000, update Loyalty\_Status\_\_c to Diamond.
- When GoldenEra\_Order\_\_c.Status\_\_c = Rejection, notify the Sales team automatically.

### Steps:

1. Setup → Process Builder → New → Name your process → Choose Object.
2. Define criteria → Add Immediate or Scheduled Actions.
3. Save & Activate.

## 4. Approval Process

Approval Processes manage record approvals in stages.

### Examples:

- Orders above a certain amount require manager approval.
- Automated actions: update order status, send notification emails to approvers.

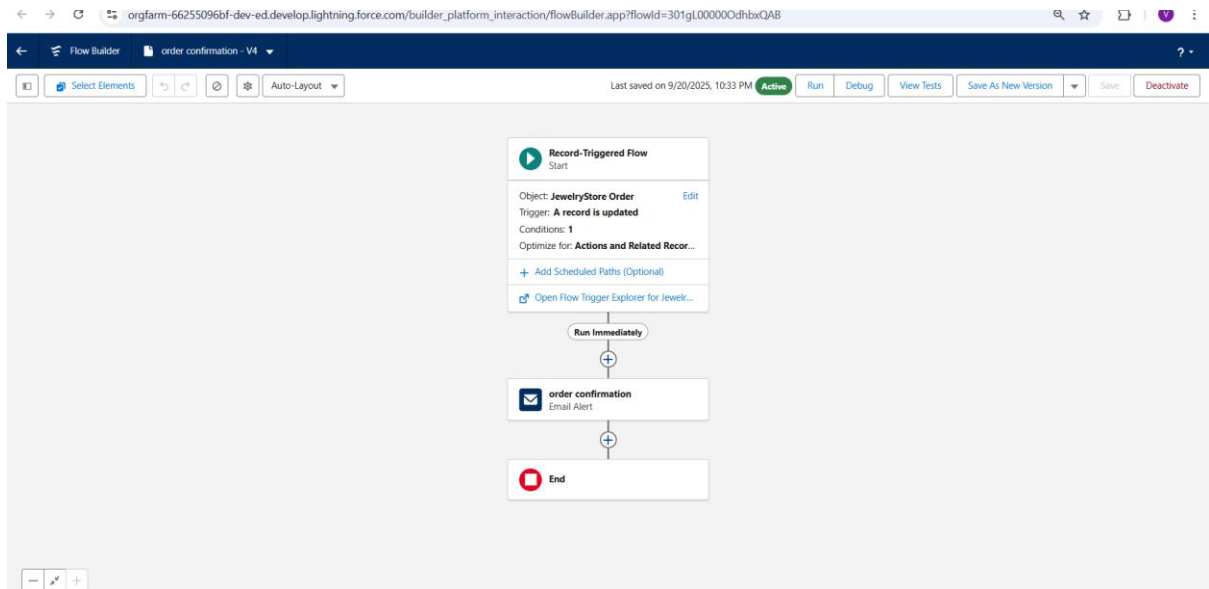
Useful for enforcing business policies and checks.

## 5.Flow Builder

## Flow Implementations

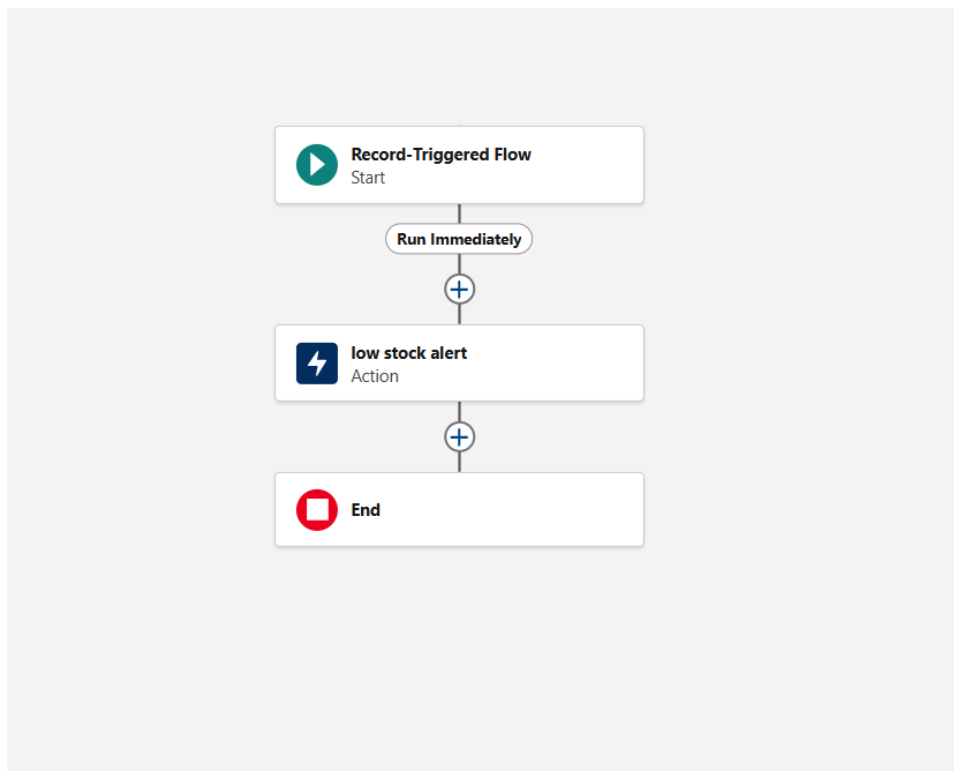
### a. Order Confirmation Flow

- Triggered when an order is updated to Confirmed.
- Sends an Order Confirmation email to the related customer.



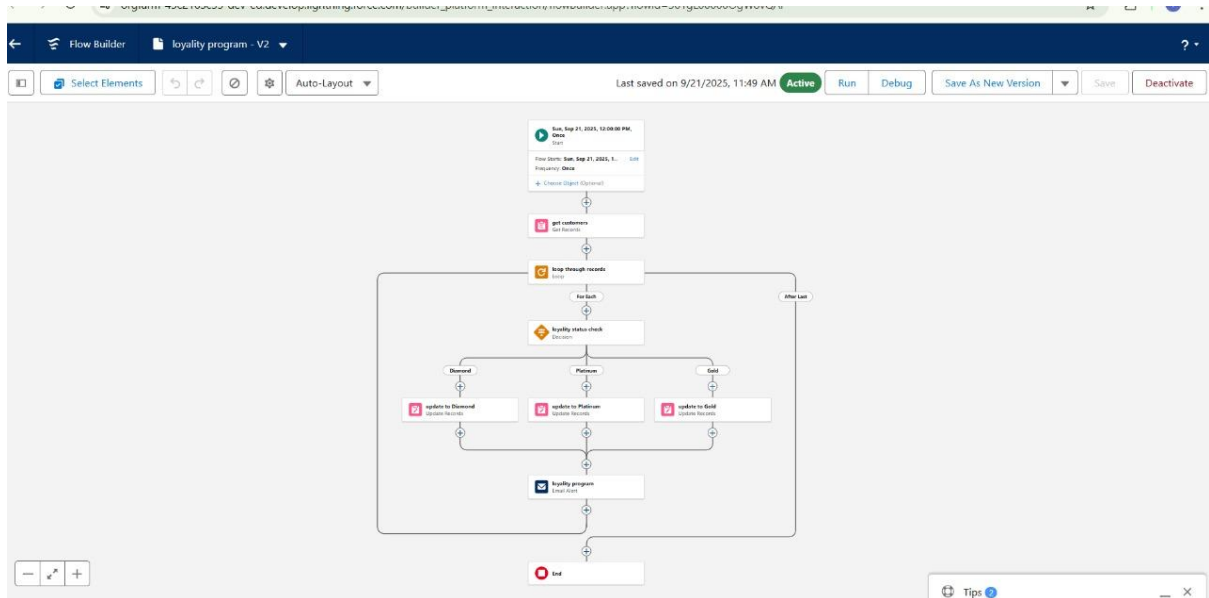
### b. Stock Alert Flow

- Triggered when Inventory stock drops below 5.
- Sends Low Stock email to Inventory Manager.



### c. Scheduled Flow:

Loyalty Update • Runs daily at midnight. • Loops through customers and updates their Loyalty Status based on total purchases.

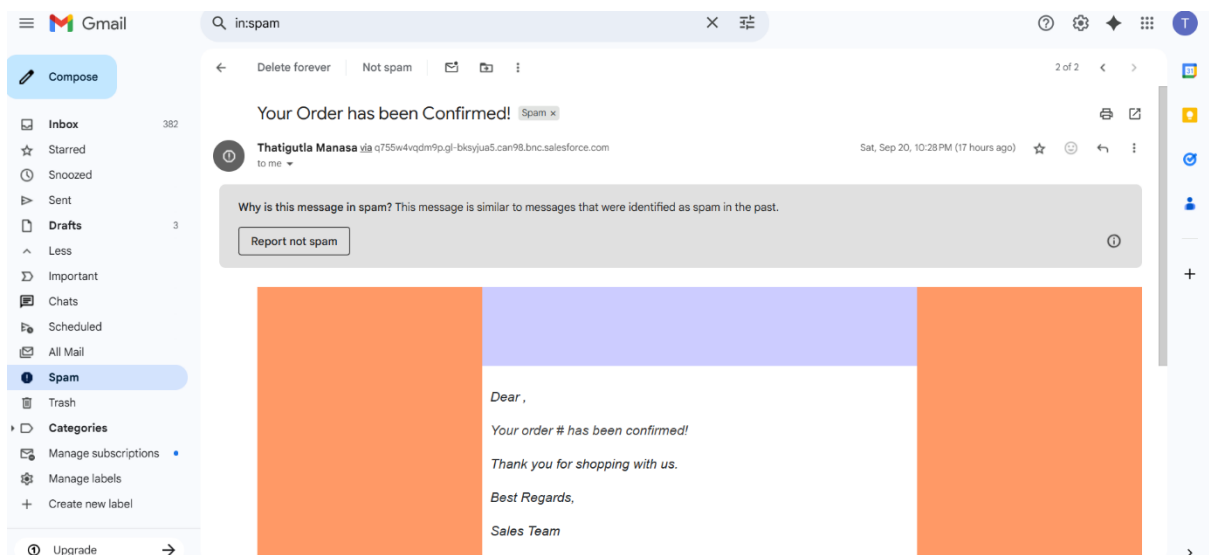


## 6. Email Alerts

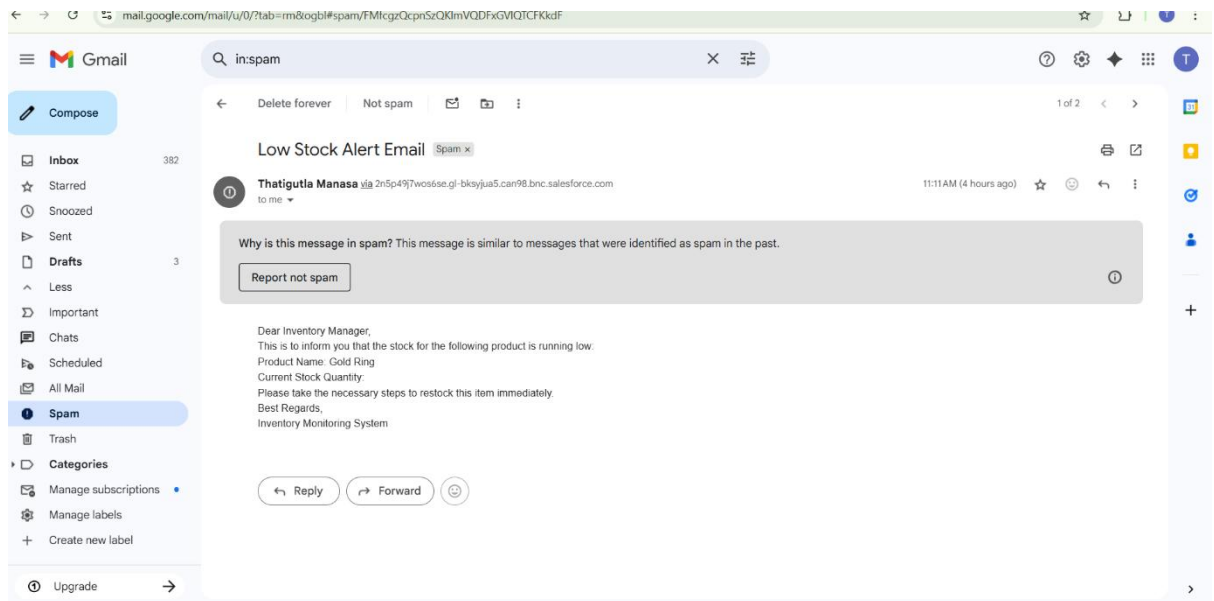
Send automated emails based on workflows, processes, or flows.

### Examples:

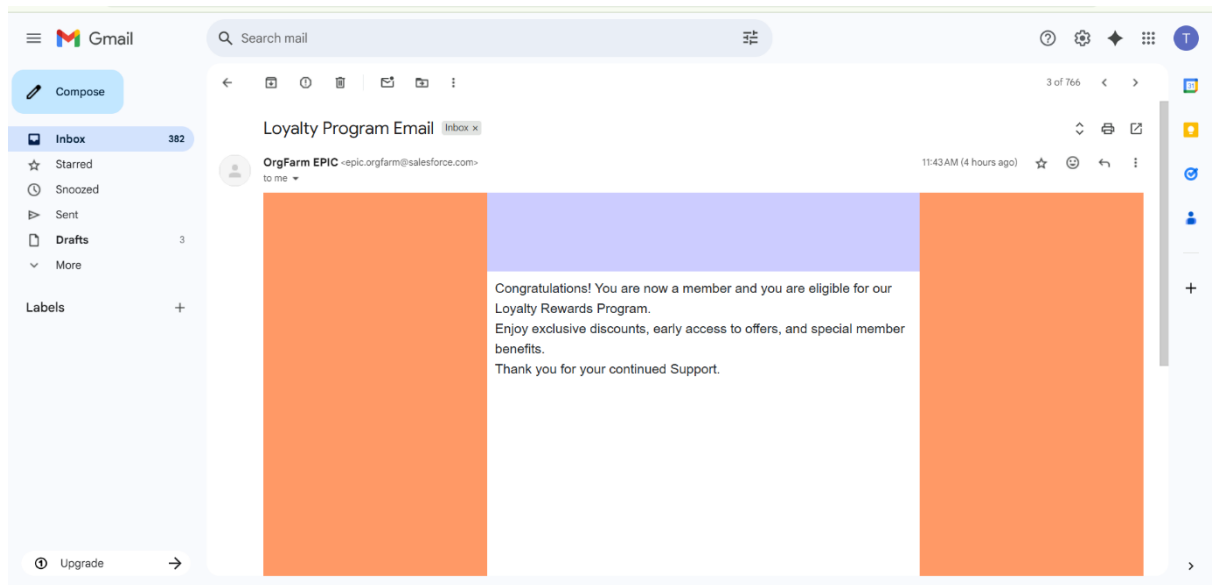
- Order Confirmation Email to customer.



- Low Stock Alert to Inventory Manager.



- Loyalty Program Email to qualifying customers.

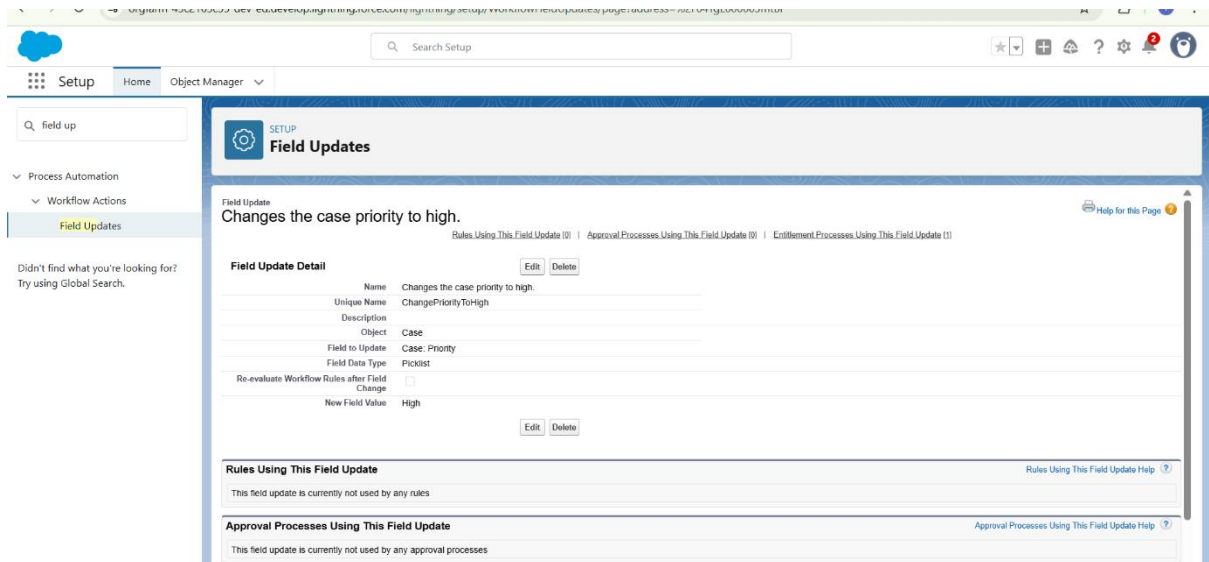


## 7. Field Updates

Automatically update field values when criteria are met.

**Examples:**

- Mark Order\_Confirmed\_\_c = true when an order is confirmed.
- Update loyalty status based on total purchases.



## 8. Custom Notifications

Send real-time notifications to users on desktop or mobile.

### Examples:

- Alert sales managers when high-value orders are placed.
- Alert inventory managers when stock is critically low.