

PHASE - 4

Validation Rules

Added data quality enforcement on Task.

Example: Prevent marking a Task as **Completed** unless Comments are filled in.

Built in **Object Manager** → **Task** → **Validation Rules**.

Tested with positive (valid) and negative (invalid) records to confirm error messages display.

Task Validation Rule

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Validation Rule Detail

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Rule Name	VLD_Task_Completed_NotesReq	Active	✓
Error Condition Formula	AND(ISPICKVAL(Status, "Completed"), ISBLANK(Description))		
Error Message	Please add Completion Notes before marking Completed.	Error Location	Status
Description	explain business intent, owner, related ticket.		
Created By	Meher Srija Potnuru, 9/25/2025, 2:25 AM	Modified By	Meher Srija Potnuru, 9/25/2025, 2:25 AM

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Workflow Rules

- Created Workflow Rule on **Task** to demonstrate legacy automation.
- Criteria: Task due within 1 day and not Completed.
- Immediate Action: Email Alert to Task Owner (Reminder).
- Time-dependent Action: Escalation if Task not updated.
- Used only for reference — migrated logic to Flow for future use.

Workflow Rule

WRK_Task_Reminder_1DayBeforeDue

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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

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Rule Name	WRK_Task_Reminder_1DayBeforeDue	Object	Task
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	Send email reminder if a Task is due tomorrow and not completed.		
Rule Criteria	AND(NOT(ISPICKVAL(Status,"Completed")), ActivityDate = (TODAY() + 1), Reminder_Sent__c = FALSE)		
Created By	Meher Srija Potnuru, 9/25/2025, 2:41 AM		Modified By Meher Srija Potnuru, 9/25/2025, 3:18 AM

Workflow Actions

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Immediate Workflow Actions

Type	Description
Email Alert	Task Due Tomorrow Reminder

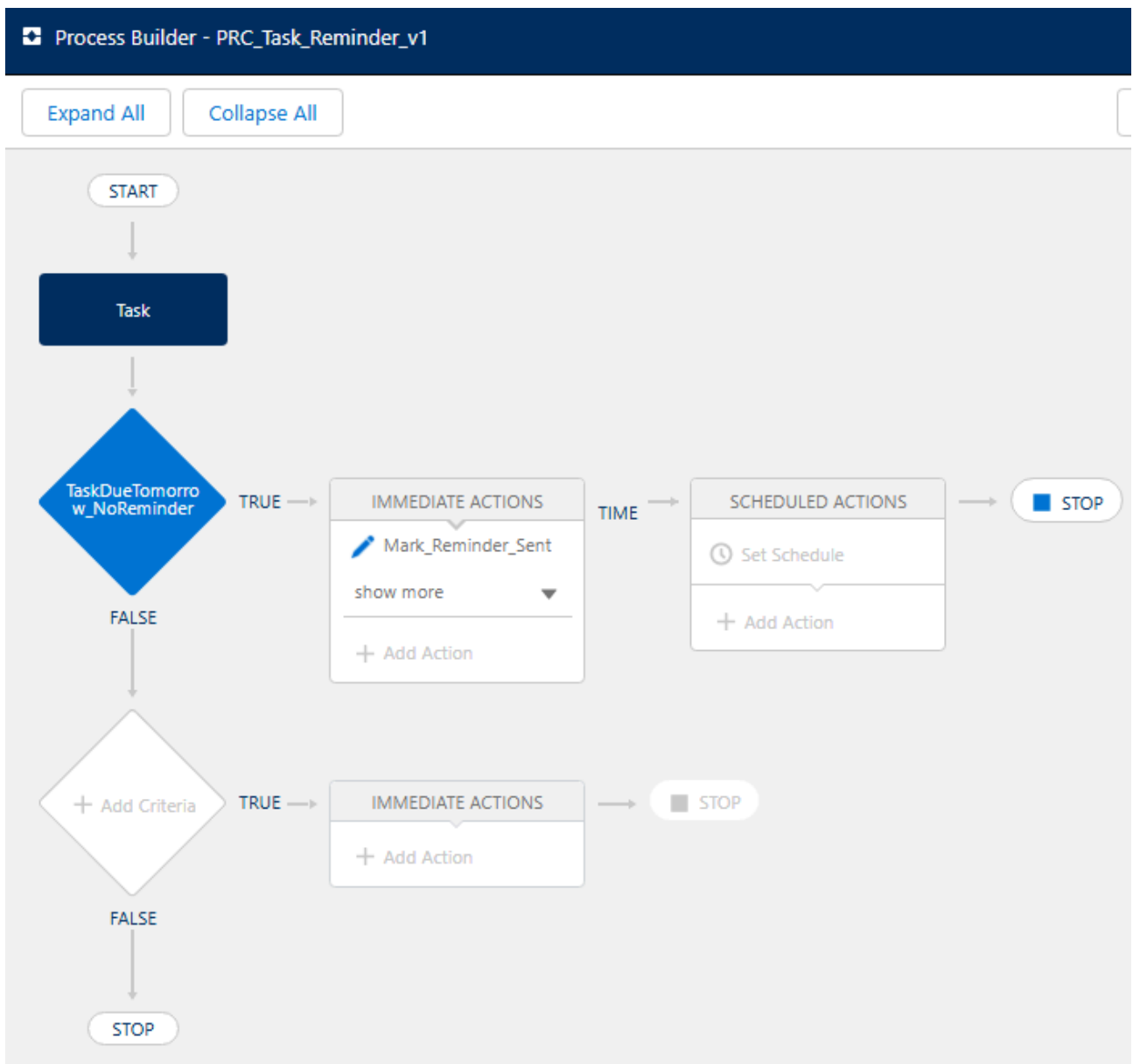
Time-Dependent Workflow Actions [See an example](#)

1 Day Before Task: Due Date	
Type	Description
Email Alert	Task Due Tomorrow Reminder

2 Days After Task: Created Date	
No workflow actions have been added to this time trigger.	

Process Builder

- Built a Process named PRC_Task_Reminder_v1.
- Trigger: when Task is created/updated.
- Criteria: Status changes to Completed.
- Action: Send Reminder Email using Email Template.
- Noted Salesforce deprecation of Process Builder → all future logic built in Flow.



Flow Builder (core automation)

a) Record-Triggered Flow — Before Save

- Auto-set default values when Task is created (e.g., `Escalation_Level__c = 0`, `Reminder_Sent__c = False`).

b) Record-Triggered Flow — After Save

- Trigger: when Task is updated to Completed or becomes overdue.
- Action: Create `Task_Escalation__c` record, send Email Alert to manager.

c) Scheduled Flow

- Runs daily at 07:00.
- Fetches Tasks due tomorrow and not Completed.
- For each Task: create `Reminder_Log__c`, send Email Alert & Custom Notification, update `Reminder_Sent__c = TRUE`.
- Bulk updates to avoid governor limits.

d) Screen Flow

- Built `ApproveTaskScreen` with: Approve/Reject choice, Comments field, Notify Manager checkbox.
- Validation: Comments required if Reject selected.
- Path Approve → update Task to Completed; Path Reject → set In Progress + log Reminder.

e) Auto-launched Flow

- Input = Task Id.
- Checks if Task overdue.
- If overdue: create `Task_Escalation__c` and return `outStatus = "Escalated"`.
- If not: `outStatus = "Not Escalated"`.
- Callable from other Flows or Process.

