

Phase 4: Process Automation (Admin) — Step-by-Step Guide (IP & Patent Management)

1) Validation Rules

Steps to implement (Patent object examples):

1. Setup → Object Manager → **Patent** → **Validation Rules** → **New**.
2. Enter Rule Name: **Expiry_After_Filing**.

Formula (this returns TRUE when invalid):

NOT(ISBLANK(Expiry_Date__c)) && NOT(ISBLANK(Filing_Date__c)) && Expiry_Date__c <= Filing_Date__c

- 3.
4. Error Message: **Expiry Date must be later than Filing Date**.
5. Error Location: select **Expiry Date** field.
6. Save → **Activate**.
7. **Test**: Try to create a Patent with expiry ≤ filing date — you should see the error.

Patent Validation Rule

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Validation Rule Detail			
Rule Name	Expiry_After_Filing	<div>EditClone</div>	Active <input checked="" type="checkbox"/>
Error Condition Formula	NOT(ISBLANK(Expiry_Date__c)) && NOT(ISBLANK(Filing_Date__c)) && Expiry_Date__c <= Filing_Date__c		
Error Message	Expiry Date must be later than Filing Date.	Error Location	Expiry Date
Description			
Created By	Parvez Sharief, 9/26/2025, 12:15 PM	Modified By	Parvez Sharief, 9/26/2025, 12:15 PM
<div>EditClone</div>			

Other useful validation examples:

- Required: `AND(ISBLANK(Patent_Number__c), Status__c = 'Granted')` — error if Granted but no number.
 - Prevent future filing date more than X years: `Filing_Date__c > (TODAY() + 3650)` (optional).
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2) Workflow Rules

We will not use Workflow Rules for this project.

Reason: Workflow Rules are legacy automation. For all new automations we will use **Flow Builder**, which handles everything Workflow Rules can do (emails, field updates, tasks) and more, so adding Workflow Rules would add unnecessary complexity.

3) Process Builder

We will not use Process Builder for this project.

Reason: Process Builder is also being phased out in favor of Flow Builder. To keep your org modern, maintainable, and aligned with best practice, we'll model automations in **Flows** (Record-Triggered, Scheduled, Auto-launched, Screen) instead of Process Builder.

4) Approval Process

Why / When: Use when a Patent filing needs formal legal approval before status becomes `Filed/Granted`.

Steps (simple approval flow for Patent submission):

1. Setup → **Approval Processes** → **Create New Approval Process** → Use Standard Setup Wizard (simple).
2. Process Name: `Patent Filing Approval`. Object: **Patent**.

3. Entry Criteria: `Status__c = 'Submitted for Approval'` (or any field you use to mark submission).
 4. Select Approver: choose **Manually assign to a user or queue** or use a field on the record (e.g., `Legal_Owner__c`).
 5. Steps: Add **Approval Step**: Approver = Legal Team (single approver).
 6. Initial Submission Actions:
 - Optional: **Lock Record** (to prevent edits while under review).
 - Email Alert to Legal team (create Email Template first).
 7. Final Approval Actions:
 - Field Update: Set `Status__c = 'Filed'` or `Status__c = 'Approved'`.
 - Send Email to Inventor.
 8. Final Rejection Actions:
 - Field Update: Set `Status__c = 'Rejected'`.
 - Send Email to Inventor with comments.
 9. **Test**: As Inventor user, click **Submit for Approval** (on record page) → approve as Legal user.
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5) Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)

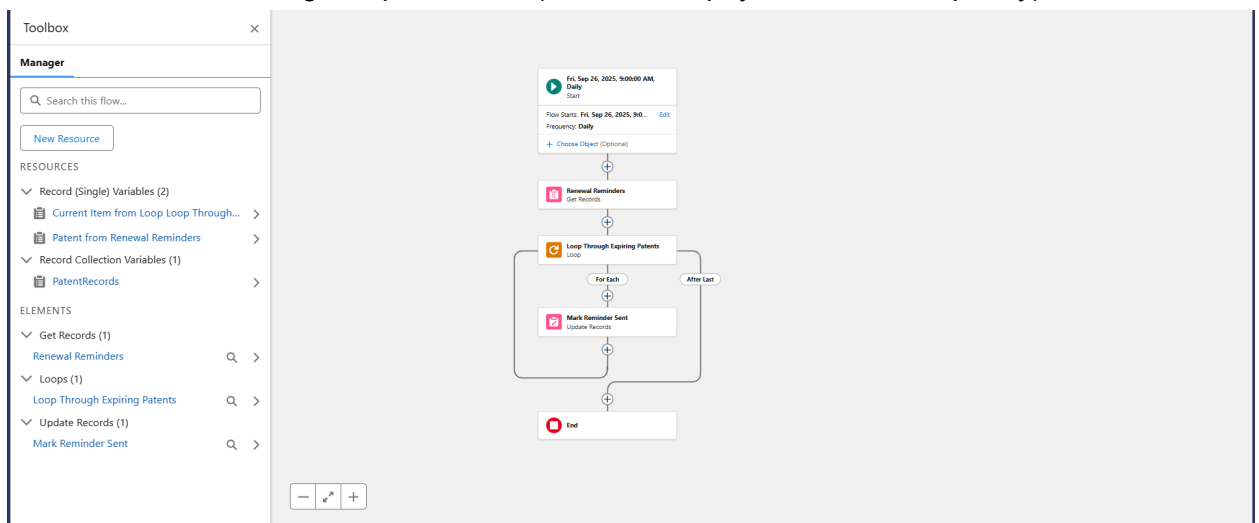
Why / When: Flow Builder is the main automation engine — we will use it for scheduled renewals, record-triggered updates, lightweight screens, and auto-launched subflows.

A — Scheduled-Triggered Flow (Renewal Reminders 90 / 30 / 7 days)

Purpose: Send renewal reminders automatically.

Steps:

1. Setup → **Flows** → **New Flow** → Choose **Schedule-Triggered Flow**.
2. Configure schedule: run **Daily** (start date = today).
3. Add **Get Records**: Query `Patent__c` where `Days_Until_Expiry__c = 90` AND `Reminder_90_Sent__c = False`.
4. Add **Loop** over results. Inside loop:
 - **Action**: Send Email / Create Task / Send Custom Notification (see sections below).
 - **Update Records**: Set `Reminder_90_Sent__c = True` for that Patent.
5. Repeat for 30 and 7 day flows (or make one flow that branches on a formula).
6. **Activate** and **Test** using sample records (set future expiry values to test quickly).



B — Record-Triggered Flow (Status changes / submit actions)

Purpose: Trigger actions when Patent status changes (e.g., auto-submit to approval or notify Legal).

Steps:

1. Setup → **Flows** → **New Flow** → **Record-Triggered Flow**.
2. Object: **Patent**, Trigger on **A record is created or updated**.

3. Entry Condition: `Status__c = 'Submitted for Approval'` AND `IsChanged(Status__c)` (use `$Record__Prior.Status__c` to detect change).
 4. Actions:
 - **Submit for Approval** (Action) OR call Approval Process via action.
 - Create Task for Legal reviewer.
 - Send Custom Notification to Legal.
 5. **Activate** and test.
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6) Email Alerts

Why / When: Send formatted emails (reminders, approval notifications).

Steps:

1. Setup → **Email Templates** → New (use Lightning Email Templates).
 - Name: `Patent_Renewal_Template_90`
 - Use merge fields: `{!Patent__c.Title__c}`,
`{!Patent__c.Expiry_Date__c}`, `{!Record_Link}`.

SETUP

Classic Email Templates

Text Email Template

Patent_Expiry_Reminder

Help for this Page

Preview your email template below.

Email Template Detail

Edit Delete Clone

Email Templates from Salesforce	Unfiled Public Classic Email Templates	
Email Template Name	Patent_Expiry_Reminder	Available For Use <input checked="" type="checkbox"/>
Template Unique Name	Patent_Expiry_Reminder	Last Used Date
Encoding	Unicode (UTF-8)	Times Used
Author	Parvez Sharief [Change]	
Description		
Created By	Parvez Sharief: 9/26/2025, 2:21 PM	Modified By Parvez Sharief: 9/26/2025, 2:21 PM

Edit Delete Clone

Email Template

Send Test and Verify Merge Fields

Subject

Reminder: Your Patent "{!Patent__c.Title__c}" is Expiring Soon

Plain Text Preview

Hello {!Patent__c.Name},
This is a reminder that your patent "{!Patent__c.Title__c}" is set to expire on {!Patent__c.Expiry_Date__c}.
Please take the necessary actions to renew or manage it.
Regards,
IP Management Team

2. Setup → Email Alerts → New Email Alert:

- Object: **Patent**
- Email Template: select template
- Recipient Type: Related Contact (Inventor), User (Owner), or Email Field
- Name: **EmailAlert_Patent_Renewal_90**

7) Field Updates

Why / When: Change status/flags automatically (e.g., set **Reminder_90_Sent__c = true**, or set **Status__c = Filed** after approval).

Steps (use Flow Update Records for new work):

1. In your Flow, add an **Update Records** element.
2. Choose the record to update (record from the Get or the record that triggered the flow).
3. Set fields, e.g., **Reminder_90_Sent__c = True**, **Status__c = 'Filed'**.

4. Save and Activate.
 5. **Test** by running the flow or simulating the triggering event.
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8) Tasks

Steps:

1. In Flow, add a **Create Records** element to create a Task.
 2. Map fields:
 - **Subject:** Patent Review – `{!Patent.Title}`
 - **WhatId:** Patent Id (WhatId links to object)
 - **OwnerId:** Legal officer user or queue id
 - **ActivityDate:** Today + 2 (due date)
 - **Status:** Not Started
 3. Save & Activate flow.
 4. **Test:** Confirm Task appears under Legal user's My Tasks & on Patent Activity related list.
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