

## Phase 4 – Process Automation (Admin)

### Deepfake CRM: Intelligent Salesforce Integration Project

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#### 1. Validation Rules

**Purpose:** Ensure data integrity, mandatory fields, correct values.

**Alert Object:**

- **Field:** Alert\_Type\_c (Picklist)
- **Rule:** Ensure Alert Type is selected
- **Formula:**

```
OR(  
ISPICKVAL(Alert_Type_c, ""),  
NOT(  
OR(  
ISPICKVAL(Alert_Type_c, "Video"),  
ISPICKVAL(Alert_Type_c, "System"),  
ISPICKVAL(Alert_Type_c, "User")  
)  
)  
)
```

- **Error Message:** " Alert Type must be Video, System, or User"

The screenshot shows the Salesforce Object Manager interface. At the top, there's a blue header bar with the word 'SETUP' and a 'Object Manager' button. Below the header, the page title is 'Alert Validation Rule'. There are 'Edit' and 'Clone' buttons above the table. The table has the following columns: 'Rule Name' (Alert\_type), 'Active' (checkbox checked), 'Error Condition Formula' (containing the formula provided earlier), 'Error Message' ("Alert Type must be Video, System, or User"), 'Error Location' (Alert Type), 'Description' (empty), 'Created By' (empty), 'Modified By' (empty), and two more empty columns. At the bottom of the table are 'Edit' and 'Clone' buttons.

## Video Object :

- **Field:** Uploaded\_By\_c (Text)
- **Rule:** Ensure Uploaded By is not blank
- **Formula:** ISBLANK(Uploaded\_By\_c)

The screenshot shows the Salesforce Object Manager interface. At the top, there's a blue header bar with the word "SETUP" and a "Object Manager" button. Below the header, the page title is "Video Validation Rule". There are "Edit" and "Clone" buttons at the top right. The main content area displays a table titled "Validation Rule Detail". The table has the following columns and data:

Validation Rule Detail		Edit	Clone
Rule Name	ConfidenceScore_Range	Active	<input checked="" type="checkbox"/>
Error Condition Formula	ISBLANK(Uploaded_By__c)	Error Location	Uploaded By
Error Message	Confidence Score must be between 0 and 100.	Created By	9/24/2025, 4:08 AM
Description		Modified By	9/24/2025, 4:08 AM
		Edit	Clone

**Error Message:** "Confidence Score must be between 0 and 100."

## 2. Workflow Rules

**Purpose:** Automate actions when records meet criteria.

### Steps:

1. Setup → Workflow Rules → **New Rule**
2. **Object:** Alert
3. **Evaluation Criteria:** created, and every time it's edited
4. **Rule Criteria:** Trigger workflow for system alerts

ISPICKVAL(Alert\_Type\_c, "System")

## 5. Save & Activate

The screenshot shows the 'Workflow Rules' page in the Salesforce Setup. A yellow callout box at the top right encourages users to migrate workflow rules to Flow Builder. The main table displays the 'Alert Type System Notification' rule, which is active and evaluates when a record is created. The 'Workflow Actions' section is collapsed.

Workflow Rule Detail		Edit	Clone	Deactivate
Rule Name	Alert Type System Notification	Object	Alert	
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created	
Description				
Rule Criteria	ISPICKVAL(Alert_Type__c, "System")			
Created By	AM	9/24/2025, 4:17	Modified By	AM
9/24/2025, 4:23				
Workflow Actions		Edit		
Immediate Workflow Actions				

## 3. Email Templates

**Purpose:** Standardize email notifications from Salesforce.

### Example Template – System Alert Notification

- **Template Name:** System\_Alert\_Notification
- **Subject:** New System Alert: {!Alert.Name}
- **Body:**

Hello {!Alert.Owner.Name},

A new system alert has been created in Salesforce.

## Alert Details:

- Name: {!Alert.Name}
- Type: {!Alert.Alert\_Type\_c}
- Created On: {!Alert.CreatedDate}
- Uploaded By: {!AlertUploaded\_By\_c}

Please review it as soon as possible.

Thanks,

Salesforce System

The screenshot shows the 'Classic Email Templates' page in Salesforce. A new email template named 'System\_Alert\_Notification' has been created. The template details are as follows:

Email Template Detail			
Email Templates from Salesforce	My Personal Email Templates		
Email Template Name	System_Alert_Notification	Available For Use	<input type="checkbox"/>
Template Unique Name	System_Alert_Notification	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	shreyansh.dubey [Change]		
Description			
Created By	9/24/2025, 4:33 AM	Modified By	9/24/2025, 4:33 AM

Below the detail section, there is a preview area for the email template:

**Email Template** **Send Test and Verify Merge Fields**

**Subject** | New System Alert: {!Alert.Name}

**Plain Text Preview**

```
Hello {!Alert.Owner.Name}.

A new system alert has been created in Salesforce.

Alert Details:
- Name: {!Alert.Name}
```

## 4. Email Alerts

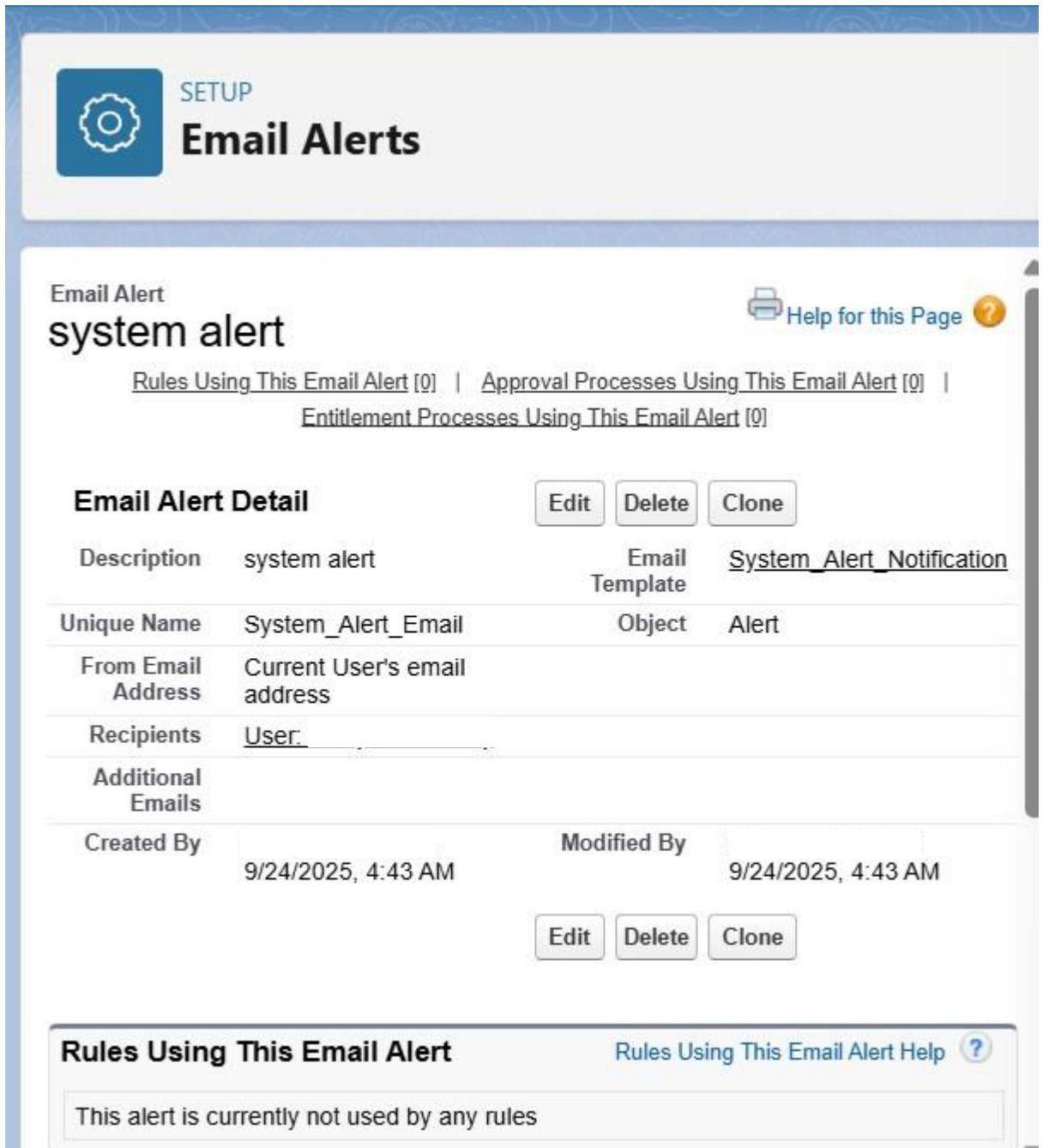
**Purpose:** Send automated email to users when workflow triggers.

### Steps:

1. Workflow Rule → **Add Workflow Action** → **New Email Alert**
2. **Name:** System\_Alert\_Email
3. **Email Template:** System\_Alert\_Notification
4. **Recipients:** Alert Owner (or specific users/roles)

5. **From Email:** Default Salesforce user

6. **Save & Activate** 



The screenshot shows the Salesforce 'Email Alerts' setup page. At the top left is a blue gear icon. To its right, the word 'SETUP' is written in a smaller font above the main title 'Email Alerts'. Below the title, the name of the current record is displayed as 'Email Alert system alert'. On the right side of this title are three icons: a printer icon, a 'Help for this Page' link, and a question mark icon.

Below the record name are three hyperlinks: 'Rules Using This Email Alert [0]', 'Approval Processes Using This Email Alert [0]', and 'Entitlement Processes Using This Email Alert [0]'. Underneath these links is a section titled 'Email Alert Detail' containing the following information:

Description	system alert	Email Template	System_Alert_Notification
Unique Name	System_Alert_Email	Object	Alert
From Email Address	Current User's email address		
Recipients	User: <a href="#">User</a>		
Additional Emails			
Created By	9/24/2025, 4:43 AM	Modified By	9/24/2025, 4:43 AM

At the bottom of the 'Email Alert Detail' section are three buttons: 'Edit', 'Delete', and 'Clone'.

Below this section is a horizontal line. Underneath the line is a box titled 'Rules Using This Email Alert' with a 'Help' link. Inside the box, it says 'This alert is currently not used by any rules'.

## 5. Testing Steps

1. Go to **Alert tab** → **New Record**

2. Fill fields:

- Alert Type\_c = System

- Other mandatory fields (Title, Uploaded By)
3. **Save** → Check:
- Validation Rule triggers for blank/invalid values ↗
  - Email Alert sent to recipient 📧
4. Optional: Edit record → test workflow triggers on update ↗
- 

## 6. Permissions & Visibility

- Ensure users have **Read/Create/Edit** access to Alert object 🚫
  - Alert tab visible in App Launcher or selected app
- 

## 7. Notes / Tips

- Always test workflow and email alerts in sandbox first ✘
  - Check **Email Deliverability Settings** → Access Level = “All Email” 📨
  - Keep validation rules simple and clear ✎
  - Document all rules and workflow steps for audit ↗
- 

## 8. Custom Notification

**Purpose:** Notify users in Salesforce UI or Mobile app when a record meets criteria.

**Steps to Add Custom Notification:**

1. **Create Custom Notification Type**
  - Setup → Notification Builder → Custom Notifications → New
  - **Name:** System\_Alert\_Notification
  - **Supported Channels:** Desktop and Mobile
  - Save 🚫
2. **Create Workflow/Process to Trigger Notification**
  - Workflow Rule → Add **New Action** → **Send Custom Notification**
  - Or Process Builder → Add **Action** → **Send Custom Notification**

### **3. Set Notification Recipients**

- Record Owner, or specific user/role ↗

### **4. Set Notification Message**

5. New System Alert Created: {!Alert.Name}

6. Please review the alert.

### **7. Activate Workflow/Process** ■

- Test by creating Alert record with Alert\_Type\_c = System
- Notification appears in Salesforc