

Phase 4 – Process Automation (Admin)

Deepfake CRM: Intelligent Salesforce Integration Project

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"

 **Object Manager**

Alert Validation Rule

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Validation Rule Detail


EditClone

Rule Name	Alert_type	Active	<input checked="" type="checkbox"/>
Error Condition Formula	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"	Error Location	Alert Type
Description			
Created By	9/24/2025, 4:13 AM	Modified By	9/24/2025, 4:13 AM

EditClone

Video Object :

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

 **SETUP**
Object Manager

Video Validation Rule

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Validation Rule Detail [Edit](#) [Clone](#)

Rule Name	ConfidenceScore_Range	Active	✓
Error Condition Formula	ISBLANK(Uploaded_By_c)		
Error Message	Confidence Score must be between 0 and 100.	Error Location	Uploaded By
Description			
Created By	9/24/2025, 4:08 AM	Modified By	9/24/2025, 4:08 AM

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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 Salesforce Setup page for Workflow Rules. The page title is 'Workflow Rules' under the 'SETUP' menu. The specific rule being viewed is 'Alert Type System Notification'. A yellow banner at the top right encourages using Flow Builder instead of workflow rules. Below this, the 'Workflow Rule Detail' section shows the rule is active, with buttons for 'Edit', 'Clone', and 'Deactivate'. The rule details include: Rule Name (Alert Type System Notification), Object (Alert), Evaluation Criteria (Evaluate the rule when a record is created), Description, Rule Criteria (ISPICKVAL(Alert_Type__c, "System")), Created By (AM), and Modified By (AM). The 'Workflow Actions' section is also visible, with an 'Edit' button. The 'Immediate Workflow Actions' section is currently empty.

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	Modified By	AM
	9/24/2025, 4:17		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: {!Alert.Uploaded_By_c}

Please review it as soon as possible.

Thanks,

Salesforce System

The screenshot displays the 'Classic Email Templates' page in Salesforce. The header includes a 'SETUP' button and the page title 'Classic Email Templates'. Below the header, the 'Text Email Template' section shows the template name 'System_Alert_Notification'. A preview of the email template is provided, showing the subject 'New System Alert: {!Alert.Name}' and the body content: 'Hello {!Alert.OwnerName}. A new system alert has been created in Salesforce. Alert Details: - Name: {!Alert.Name}'. The 'Email Template Detail' section includes fields for 'Email Template Name', 'Template Unique Name', 'Encoding', 'Author', 'Description', 'Created By', 'Available For Use', 'Last Used Date', 'Times Used', and 'Modified By'. The 'Email Template' section includes a 'Send Test and Verify Merge Fields' button and a 'Plain Text Preview' of the email content.

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

Email Template Send Test and Verify Merge Fields

Subject New System Alert: {!Alert.Name}

Plain Text Preview

Hello {!Alert.OwnerName}.
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** ■

 **SETUP**
Email Alerts

Email Alert

system alert

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[Rules Using This Email Alert \(0\)](#) | [Approval Processes Using This Email Alert \(0\)](#) | [Entitlement Processes Using This Email Alert \(0\)](#)


Email Alert Detail

EditDeleteClone

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		
Additional Emails			
Created By	9/24/2025, 4:43 AM	Modified By	9/24/2025, 4:43 AM

EditDeleteClone

Rules Using This Email Alert

[Rules Using This Email Alert Help](#) 

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 Salesforce