

Salesforce Phase 4 – Process Automation (Admin)

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 gear icon. Below it, the 'Object Manager' tab is selected. In the center, there's a card titled 'Alert Validation Rule'. The card has a 'Validation Rule Detail' section with the following details:

- Rule Name: Alert_type
- Active: checked
- 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"
- Description: (empty)

At the bottom right of the card, there are 'Edit' and 'Clone' buttons. To the right of the card, there's a 'Help for this Page' link with a question mark icon.

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 'SETUP' button and the 'Object Manager' label. Below the header, the main content area has a title 'Video Validation Rule' and a 'Back to Video' link. On the right side of the title, there's a 'Help for this Page' button with a question mark icon. The main content is a 'Validation Rule Detail' section. It includes a table with the following data:

Validation Rule Detail		Edit	Clone
Rule Name	ConfidenceScore_Range	Active	<input checked="" type="checkbox"/>
Error Condition Formula	ISBLANK(Uploaded_By__c)		
Error Message	Confidence Score must be between 0 and 100.	Error Location	Uploaded By
Description			

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 'Workflow Rules' page under the 'SETUP' tab. A blue header bar at the top has a gear icon and the word 'SETUP'. Below it, a blue bar says 'Workflow Rules'. The main content area has a title 'Workflow Rule' and a sub-title 'Alert Type System Notification'. To the right is a 'Help for this Page' link with a question mark icon. A yellow callout box contains a message about migrating workflow rules to Flow Builder, with links to 'Tell Me More' and 'Migrate your workflow rules to flows'. Below the title is a 'Workflow Rule Detail' section with tabs for 'Edit', 'Clone', and 'Deactivate'. The rule details are as follows:

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")		

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 template is being created with the following details:

- Email Template Detail:**
 - Email Template Name: System_Alert_Notification
 - Template Unique Name: System_Alert_Notification
 - Encoding: Unicode (UTF-8)
 - Author: [User]
 - Description: [Empty]
- Email Template:**
 - 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

1. Go to **Alert tab** → **New Record**
2. Fill fields:
 - o Alert Type__c = System
 - o 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
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6. Permissions & Visibility

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