

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 navigation bar with 'SETUP' and 'Object Manager'. Below it, a sub-header says 'Alert Validation Rule' with a 'Back to Alert' link and a 'Help for this Page' button. The main area is titled 'Validation Rule Detail' with tabs for 'Edit' and 'Clone'. The rule is named 'Alert_type'. It has an 'Active' status checked. The 'Error Condition Formula' field contains the formula provided above. The 'Error Message' field is set to 'Alert Type must be Video, System, or User'. The 'Created By' field shows 'shreyansh dubey, 9/24/2025, 4:13 AM'. The 'Modified By' field also shows 'shreyansh dubey, 9/24/2025, 4:13 AM'. There are 'Edit' and 'Clone' buttons at the bottom of the detail section.

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 title "Video Validation Rule" is displayed, along with a "Help for this Page" link. A "Back to Video" link is also present. The main content area is titled "Validation Rule Detail". It contains a table with the following data:

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

At the bottom of the detail page, there are "Edit" and "Clone" buttons.

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

⚡ 2. Workflow Rules

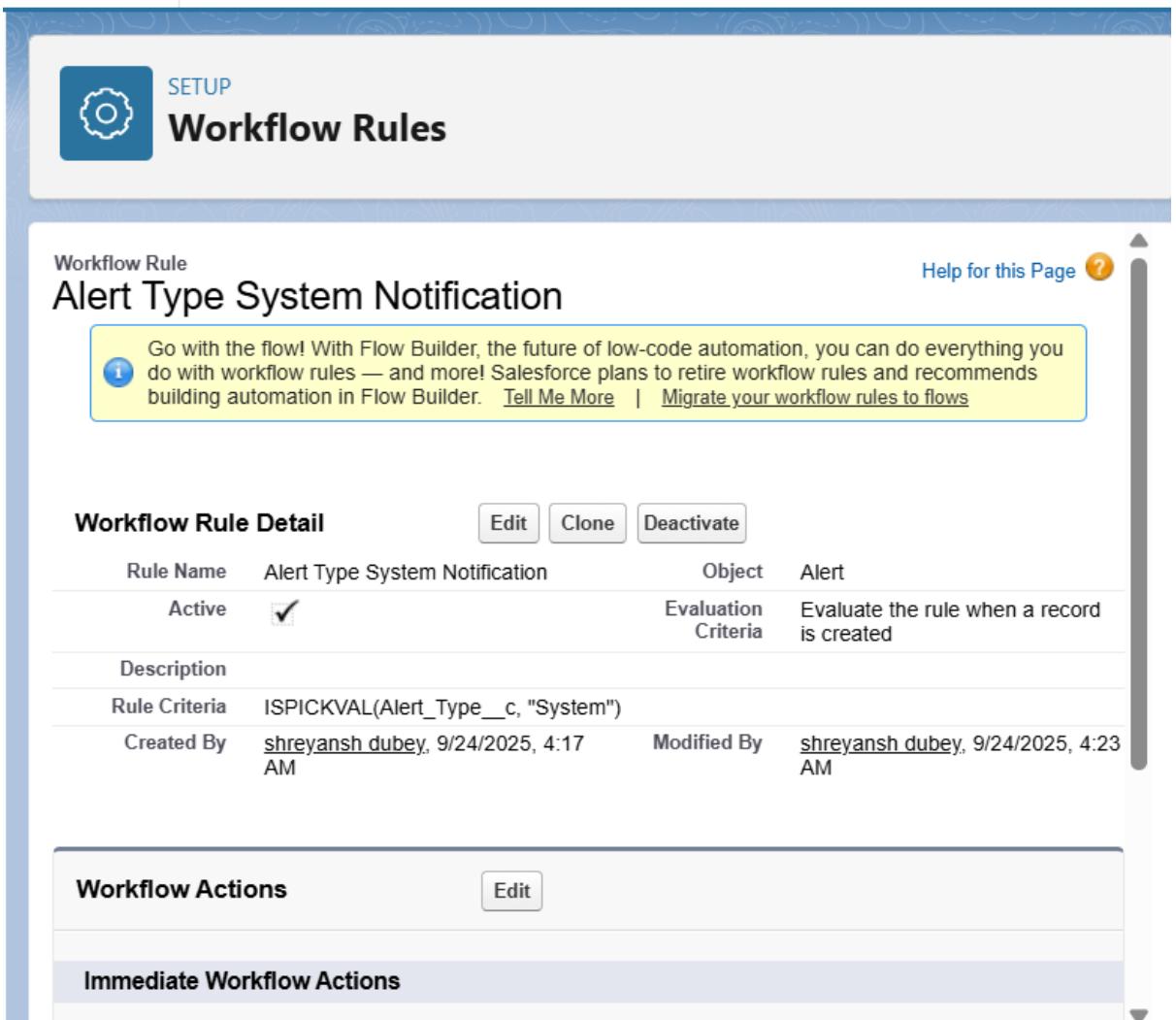
Purpose: Automate actions when records meet criteria.

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 Salesforce. The rule is named 'Alert Type System Notification'. It is active and evaluates when a record is created. The rule criteria is 'ISPICKVAL(Alert_Type__c, "System")'. The rule was created by 'shreyansh dubey' on 9/24/2025 at 4:17 AM and modified by the same user on 9/24/2025 at 4:23 AM.

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	shreyansh dubey, 9/24/2025, 4:17 AM	Modified By	shreyansh dubey, 9/24/2025, 4:23 AM

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 named 'System_Alert_Notification' has been created. The template details are as follows:

Email Template Detail	Value
Email Templates from Salesforce	My Personal Email Templates
Email Template Name	System_Alert_Notification
Template Unique Name	System_Alert_Notification
Encoding	Unicode (UTF-8)
Author	shreyansh.dubey [Change]
Description	
Created By	shreyansh.dubey, 9/24/2025, 4:33 AM
Modified By	shreyansh.dubey, 9/24/2025, 4:33 AM

Below the details, there is a preview section titled 'Plain Text Preview' which contains the following content:

Hello {!Alert_Owner_Name}.

A new system alert has been created in Salesforce.

Alert Details:

- Name: {!Alert.Name}

4. Email Alerts

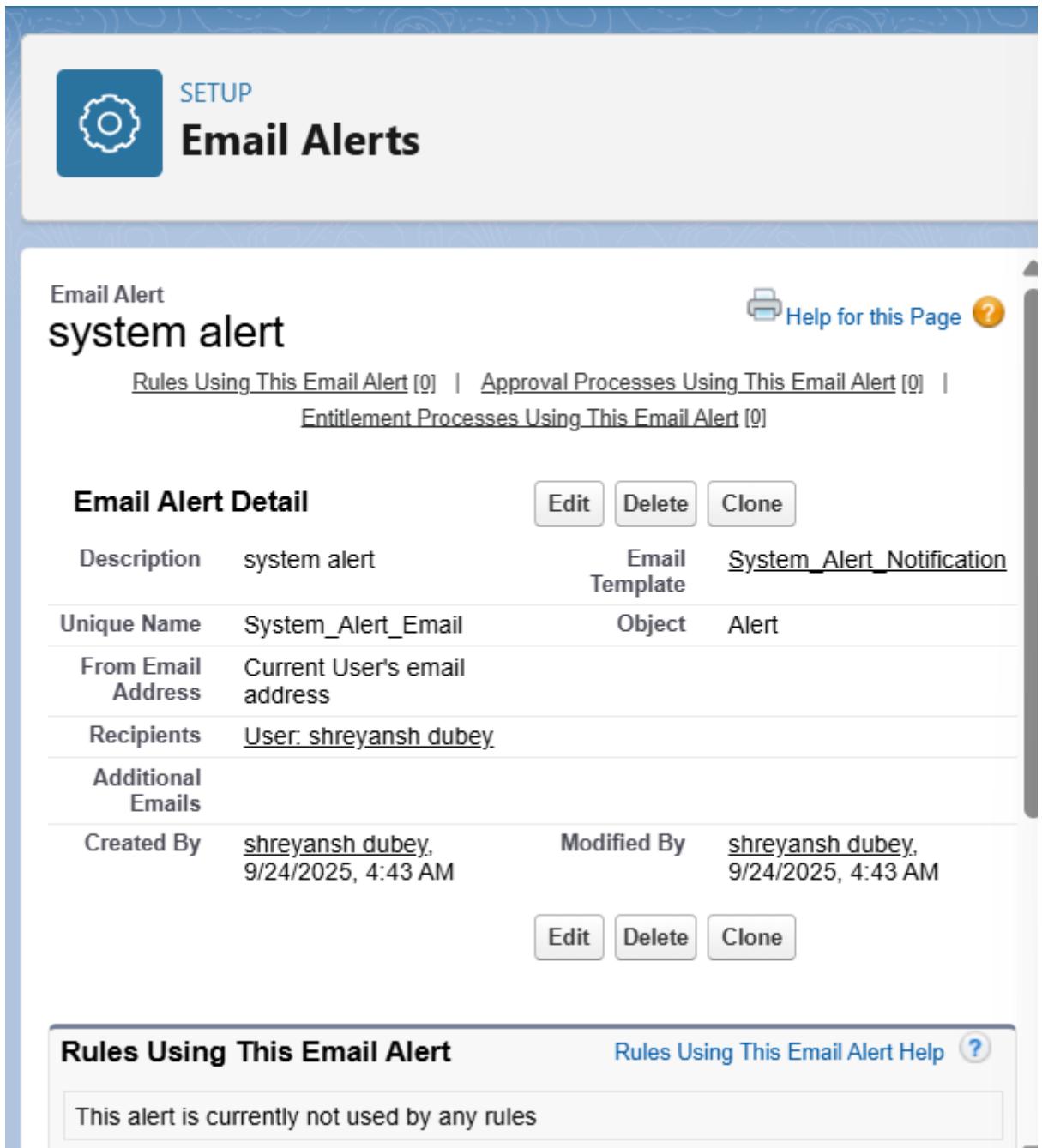
Purpose: Send automated email to users when workflow triggers.

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 Setup interface under the Email Alerts section. A blue gear icon is visible on the left. The main title is "Email Alert" followed by the specific name "system alert". Below the title, there are three links: "Rules Using This Email Alert [0]", "Approval Processes Using This Email Alert [0]", and "Entitlement Processes Using This Email Alert [0]".

Email Alert Detail

Description	system alert	Email Template	System_Alert_Notation
Unique Name	System_Alert_Email	Object	Alert
From Email Address	Current User's email address		
Recipients	User: shreyansh dubey		
Additional Emails			
Created By	shreyansh dubey, 9/24/2025, 4:43 AM	Modified By	shreyansh dubey, 9/24/2025, 4:43 AM

Buttons for "Edit", "Delete", and "Clone" are located above and below the detail table.

Rules Using This Email Alert

This alert is currently not used by any rules

Help for this Page 

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