

Salesforce Project Implementation Phases with Concepts (Admin + Developer)

Project Title: Manufacturing After-Sales & Service CRM

Phase 4: Process Automation (Admin)

1. Validation Rules:

- **Warranty Expiry Date > Purchase Date:**

Ensures warranty expiry date is after the product purchase date

Registered Product Validation Rule

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Validation Rule Detail

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Rule Name	Warranty_Expiry_after_Purchase	Active	✓
Error Condition Formula	Warranty_Expiry__c <= Purchase_Date__c		
Error Message	Warranty Expiry must be after Purchase Date	Error Location	Warranty Expiry
Description			
Created By	Puneet Verma, 23/09/2025, 3:27 pm	Modified By	Puneet Verma, 23/09/2025, 3:27 pm

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- **SLA Deadline cannot be past Case Created Date:**

Prevents SLA deadline from being set before case creation

Service Case Validation Rule

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Validation Rule Detail

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Rule Name	SLA_Deadline_Check	Active	✓
Error Condition Formula	SLA_Deadline__c < NOW()		
Error Message	SLA deadline cannot be set in the past	Error Location	SLA Deadline
Description			
Created By	Puneet Verma, 23/09/2025, 3:12 pm	Modified By	Puneet Verma, 25/09/2025, 6:52 pm

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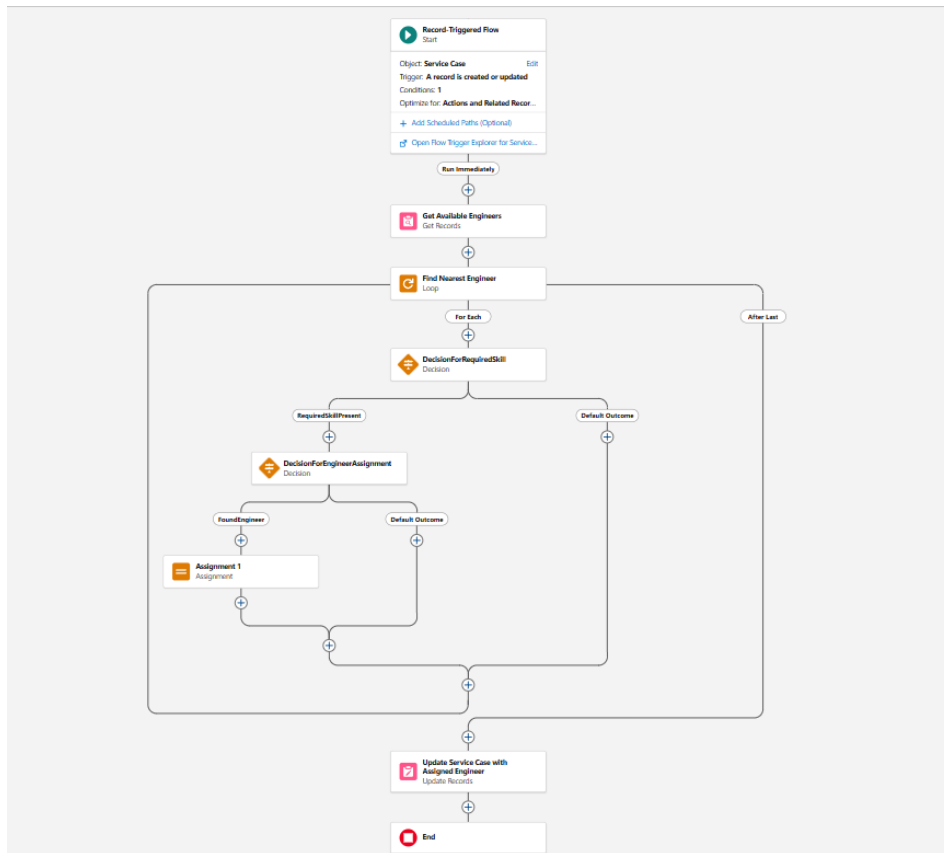
Clone

2. Flows:

2.1 Auto-Assign Engineer Flow

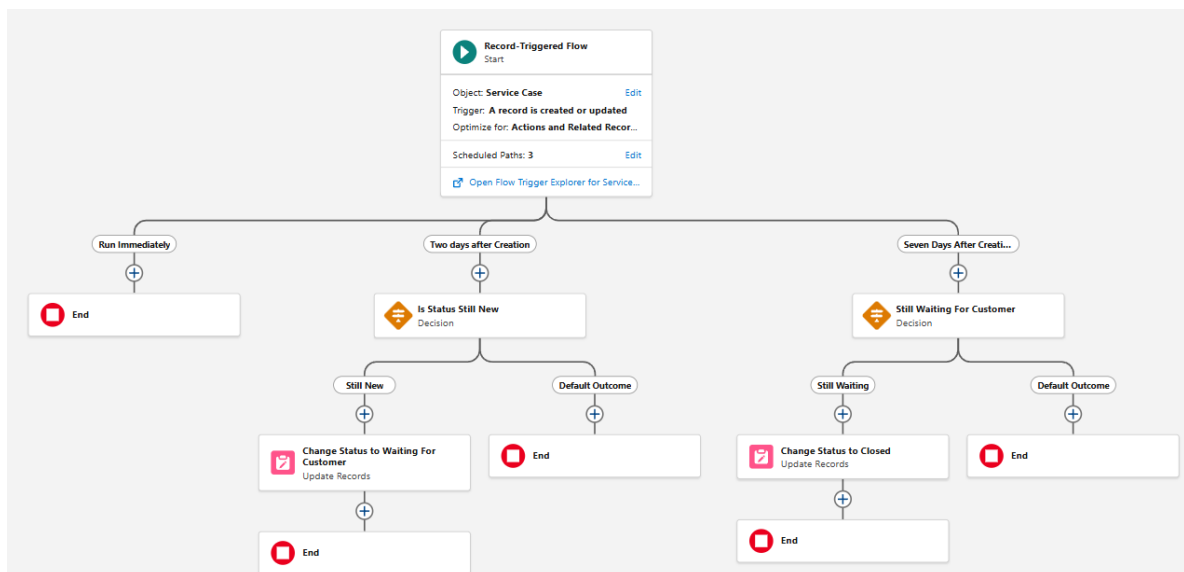
- **Trigger:** When a new Service Case is created.
- **Current Functionality:**
Automatically assigns an available engineer.
Updates the Service Case status to In Progress.
- **Next Step:**

Enhance flow to assign engineers based on required skills matching the Service Case and engineer skills.



2.2 Status Update Flow

- **Trigger:** When a Service Case is assigned or update.
- **Functionality:**
Updates the Service Case status automatically
Tracks status progression: New → In Progress → Resolved → Closed



2.3 Approval Process for Warranty Claims:

- **Trigger:** When a Service Case references a product older than 1 year (Product_Older_Than_1_Year__c = TRUE)
- **Functionality:**
Routes the case for manager approval.
Allows manager to approve or reject long-term warranty claims.
- **Implementation:**
Formula checkbox created: Product_Older_Than_1_Year__c
Approval process configured using standard Salesforce approval workflow

The screenshot displays the Salesforce Setup interface for an approval process named 'Warranty_Claims_Over_1_Year'. The page is titled 'Approval Processes' and includes a 'SETUP' icon. The main configuration area shows the following details:

- Unique Name:** Warranty_Claims_Over_1_Year
- Next Automated Approver Determined By:** Manager of Record Submitter
- Description:** Service Case: Product Older Than 1 Year EQUALS True
- Entry Criteria:** Service Case: Product Older Than 1 Year EQUALS True
- Record Editability:** Administrator OR Current Approver
- Allow Submitters to Recall Approval Requests:** ☐
- Approval Assignment Email Template:** (Empty)
- Initial Submitters:** Service Case Owner, Role: Service Agent
- Created By:** Puneet Verma, 24/09/2025, 8:16 pm
- Modified By:** Puneet Verma, 25/09/2025, 7:06 pm

Below the configuration details, there are four sections for defining the approval process actions:

- Initial Submission Actions:** Includes actions like Record Lock (Lock the record from being edited), Field Update (Service Case Status Update), and Email Alert (Warranty Claim Approval Request).
- Approval Steps:** Shows a single step named 'Warranty Claim Approver' with the assigned approver 'Manager' and reject behavior 'Final Rejection'.
- Final Approval Actions:** Includes actions like Record Lock (Unlock the record for editing), Field Update (Status Updated After Approval), and Email Alert (Warranty Claim Approved).
- Final Rejection Actions:** Includes actions like Record Lock (Unlock the record for editing), Email Alert (Warranty Claim Rejected), and Field Update (Status Updated After Rejection).

3. Key Outcomes Achieved in Phase 4

- **Data Quality & Compliance**
Validation rules prevent incorrect warranty or SLA data.
- **Process Automation**
Service Case assignment is partially automated.
Status updates automated based on case progress.
- **Approval Management**
Warranty claims exceeding 1 year route to manager for approval.
- **Foundation for Apex**
Flows designed to integrate with Apex for enhanced email notifications and skill-based engineer assignment.