

RenewSure – Smart Contract Renewal & Expiry Management System.

Phase 4: Automation & Approval Documentation

Status: Completed

1. Overview

Phase 4 focuses on automation and workflow processes that enhance contract management:

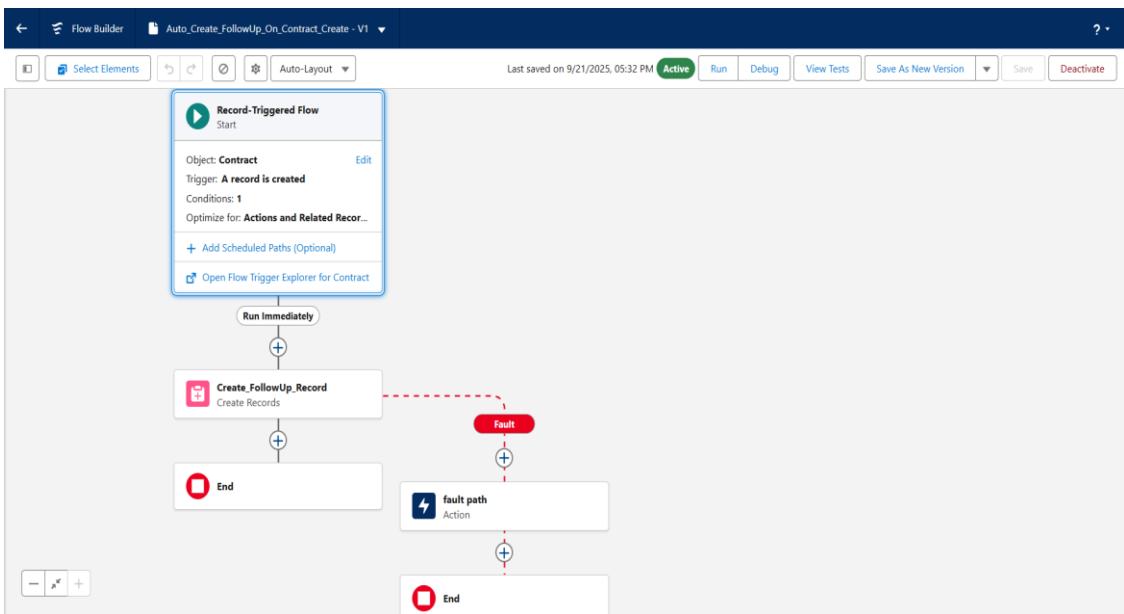
- Auto-create FollowUp records when a Contract is created.
- Send Renewal Reminder Emails 30 days before contract expiry.
- Implement an Approval Process so that Contracts must be approved before becoming Active.

2. Record-Triggered Flow – Auto FollowUp

Objective: Automatically create a FollowUp task 7 days before contract end date when a new Contract is created.

Steps Implemented:

- Setup → Flows → New Flow → Record-Triggered Flow.
- Object: Contract_c.
- Trigger: On Create.
- Entry Condition: End_Date_c IS NOT NULL.
- Action: Create FollowUp_c record with these values:
 - * Name: "Auto Follow-up for Contract {!\$Record.Name}"
 - * FollowUp_Date_c: End_Date_c - 7 days (Formula)
 - * Type_c: Email
 - * Status_c: Pending
 - * Assigned_To_c: \$Record.OwnerId
 - * Contract_c: \$Record.Id
- Flow Activated



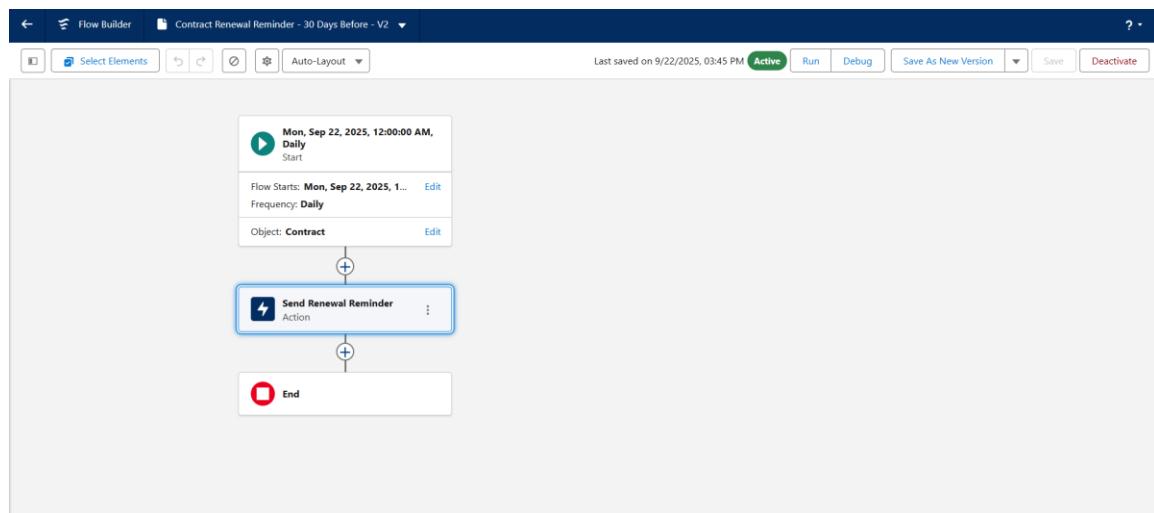
3. Scheduled Flow – Renewal Reminder Email Alert

Objective: Send reminder email to contract owner 30 days before contract end date.

Steps Implemented:

- Setup → Flows → New Flow → Scheduled Triggered Flow.
- Object: Contract_c.
- Schedule: Daily.
- Condition: End_Date_c = TODAY() + 30 (Formula ReminderDate_Formula).
- Action: Send Email via Email Alert.
- Recipient: Contract Owner.
- Email Template: "Renewal Reminder Email" (Lightning template).

Flow Activated.



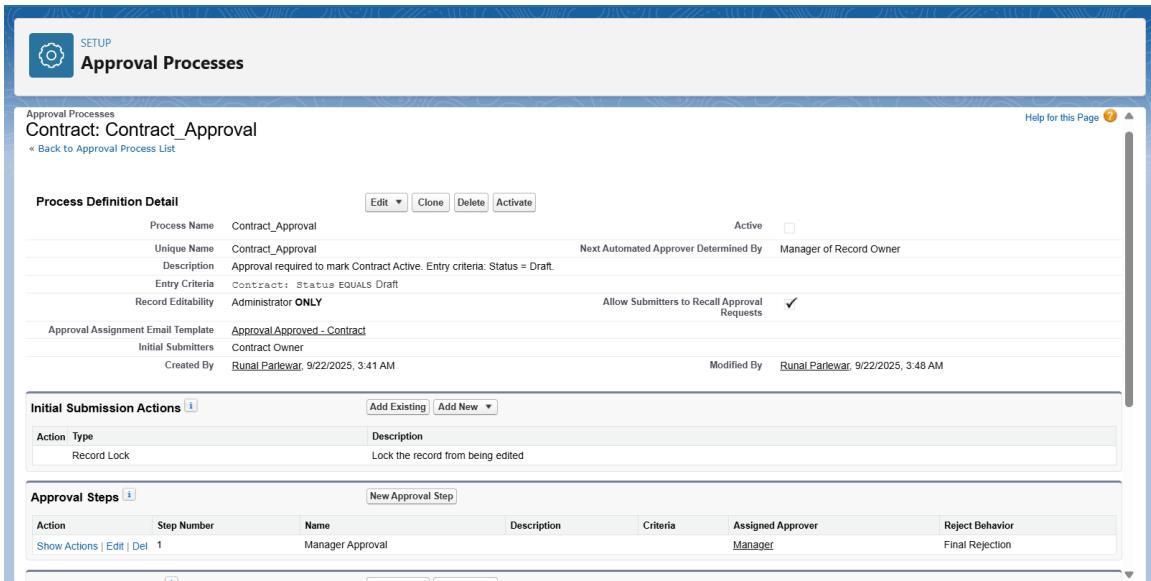
4. Approval Process – Contract Approval

Objective: Ensure all contracts are reviewed before activation.

Steps Implemented:

- Setup → Approval Processes → New Approval Process.
- Object: Contract_c.
- Name: Contract_Approval.
- Entry Criteria: Status_c = 'Draft'.
- Initial Submitter: Contract Owner.
- Approver: Manager of Contract Owner.
- Final Approval Action: Update Status_c = Active.
- Final Rejection Action: Update Status_c = Rejected.

 Approval process deployed and active.



The screenshot shows the 'Approval Processes' page in Salesforce. The top navigation bar includes 'SETUP' and the title 'Approval Processes'. Below the title, it says 'Contract: Contract_Approval' and 'Back to Approval Process List'. The main section is titled 'Process Definition Detail' for 'Contract_Approval'. It contains the following fields:

- Process Name: Contract_Approval
- Unique Name: Contract_Approval
- Description: Approval required to mark Contract Active. Entry criteria: Status = Draft.
- Entry Criteria: Contract: Status EQUALS Draft
- Record Editability: Administrator ONLY
- Allow Submitters to Recall Approval Requests: checked
- Approval Assignment Email Template: Approval_Approved - Contract
- Initial Submitters: Contract Owner
- Created By: Runal Partewar, 9/22/2025, 3:41 AM
- Modified By: Runal Partewar, 9/22/2025, 3:48 AM

Below this, there are two sections:

- 'Initial Submission Actions':
 - Action Type: Record Lock
 - Description: Lock the record from being edited
- 'Approval Steps':
 - Action: Step Number 1, Name: Manager Approval
 - Description: Manager Approval
 - Criteria: Manager
 - Assigned Approver: Manager
 - Reject Behavior: Final Rejection

5. Testing Evidence

- Test Contract Created → Auto FollowUp generated correctly.
- Test Contract End Date = Today + 30 → Renewal Reminder Email scheduled.
- Draft Contract Submitted → Routed to approver, Status updated after approval/rejection.

6. Screenshots (Insert Here)

Additional screenshots: Renewal Reminder Email Template.

The screenshot shows the 'Renewal Reminder Email' email template in a CRM application. The interface includes a header with 'Email Template' and 'Renewal Reminder Email'. Below the header are tabs for 'Details' and 'Related'. The 'Details' tab is active, showing the following information:

Email Template Name	Related Entity Type
Renewal Reminder Email	Contract
Description	Folder
Made in Email Template Builder	Public Email Templates

Under the 'Message Content' section, there are two tabs: 'Subject' and 'Enhanced Letterhead'. The 'Subject' tab contains the following text:

Reminder: Contract {{Contract_c.c.Contract_Name_c.c}} is due on {{Contract_c.c.End_Date_c.c}}

The 'Enhanced Letterhead' tab contains the following text:

HTML Value
Hello {{Contract_c.c.Id}},
This is a reminder that the contract "{{Contract_c.c.Contract_Name_c.c}}" will expire on {{Contract_c.c.End_Date_c.c}}.
Contract Value: {{Contract_c.c.Contract_Value_c.c}}
Account: {{Contract_c.c.Account_c.c}}
Please review and take necessary action to renew.

At the bottom, it says 'Regards,' and 'RenewSure Contract Management System'.