

Phase 4: Process Automation (Admin)

Introduction & Objectives

Phase 4 focuses on automating the key sustainability workflows within the GreenForce Salesforce platform. The objective is to reduce manual effort, ensure compliance, and improve engagement by leveraging Salesforce automation tools such as Flows, Approval Processes, and Notifications.

Tools Used

- Flows – Record-Triggered, Scheduled, and Screen Flows for process automation.
- Approval Processes – Structured approvals for sustainability initiatives.
- Email Alerts & Notifications – Automated reminders and acknowledgements.

Key Automations

Carbon Data Submission Flow

Triggered when a supplier submits a new carbon emission record. Validates required fields, sends confirmation to the supplier, and notifies the Sustainability Analyst for review.

Sustainability Initiative Approval Process

Triggered when an Analyst submits an initiative. Routed to the Sustainability Manager for approval. Approved initiatives are marked as active; rejected ones trigger a notification with comments.

Employee Engagement Automation

Triggered when an employee logs a sustainability activity. Awards points, updates engagement score, and triggers recognition email if thresholds are met.

Scheduled Monthly Emission Report

Triggered at the beginning of each month. Aggregates previous month's emission data and emails dashboards to the Manager and Analysts.

Compliance Reminder Flow

Reminds suppliers of upcoming deadlines 7 days in advance. Escalates overdue notifications to the Manager.

Deliverables

- Automated workflows for emissions, initiatives, and employee activities.
- Approval process for sustainability initiatives.
- Notifications and reminders for compliance deadlines.
- Scheduled monthly sustainability reports.

- Validated data collection and reduced manual errors.

Business Value

- Efficiency – Reduces repetitive manual tasks.
- Compliance – Ensures timely reporting and regulatory adherence.
- Engagement – Keeps employees and suppliers motivated to participate.
- Accuracy – Prevents incomplete or incorrect data submissions.