

Phase 4: Process Automation

1. Validation Rules

Use Case:

Validation Rules ensure data integrity by preventing users from entering incorrect or incomplete information. For example, in the Complaints object, you might want to ensure that the “Complaint Resolution Date” is not earlier than the “Complaint Logged Date.”

Implementation in your project:

- Go to **Setup** → **Object Manager** → **Complaints** → **Validation Rules** → **New**

The screenshot displays the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). A search bar labeled 'Search Setup' is on the right. Below the navigation bar, the 'Object Manager' section is active, showing 'Complaint Validation Rule'. A 'Back to Complaint' link is visible. The main content area is titled 'Validation Rule Detail' and includes a table with the following information:

Rule Name	Resolution_Date_Check	Active	✓
Error Condition Formula	Resolution_Date__c < Logged_Date__c	Error Location	Resolution Date
Error Message	Resolution Date cannot be earlier than Logged Date.		
Description			
Created By	Samyak Jain, 9/25/2025, 10:00 AM	Modified By	Samyak Jain, 9/25/2025, 10:00 AM

Buttons for 'Edit' and 'Clone' are present for the rule name, error message, and the bottom row.

2. Workflow Rules

Use Case:

Workflow Rules automate standard processes like sending emails, updating fields, or creating tasks when certain conditions are met. For example, if a complaint’s status changes to “Escalated,” a task can be assigned to the manager automatically.

Implementation:

- Go to **Setup** → **Workflow Rules** → **New Rule** → **Select Object (Complaints)**
- Define Criteria: e.g., **Status = Escalated**
- Add Actions:
 - **Field Update:** Change priority to “High”
 - **Email Alert:** Notify manager

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with options like Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Subscription Management, Apps, Feature Settings, Slack, Data Cloud). The main content area is titled 'Workflow Rules' and shows the configuration for a rule named 'Escalated_Complaint_Notification'. It is at 'Step 3 of 3: Specify Workflow Actions'. The rule criteria are 'Complaint: Status EQUALS Escalated' and 'Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria'. Under 'Immediate Workflow Actions', there is a table with two actions: 'Email Alert' (labeled 'New Email Alert') and 'Field Update' (labeled 'Priority'). Below this, a yellow message box states: 'No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.' There is an 'Add Time Trigger' button at the bottom of the message box.

Action	Type	Description
Edit Remove	Email Alert	New Email Alert
Edit Remove	Field Update	Priority

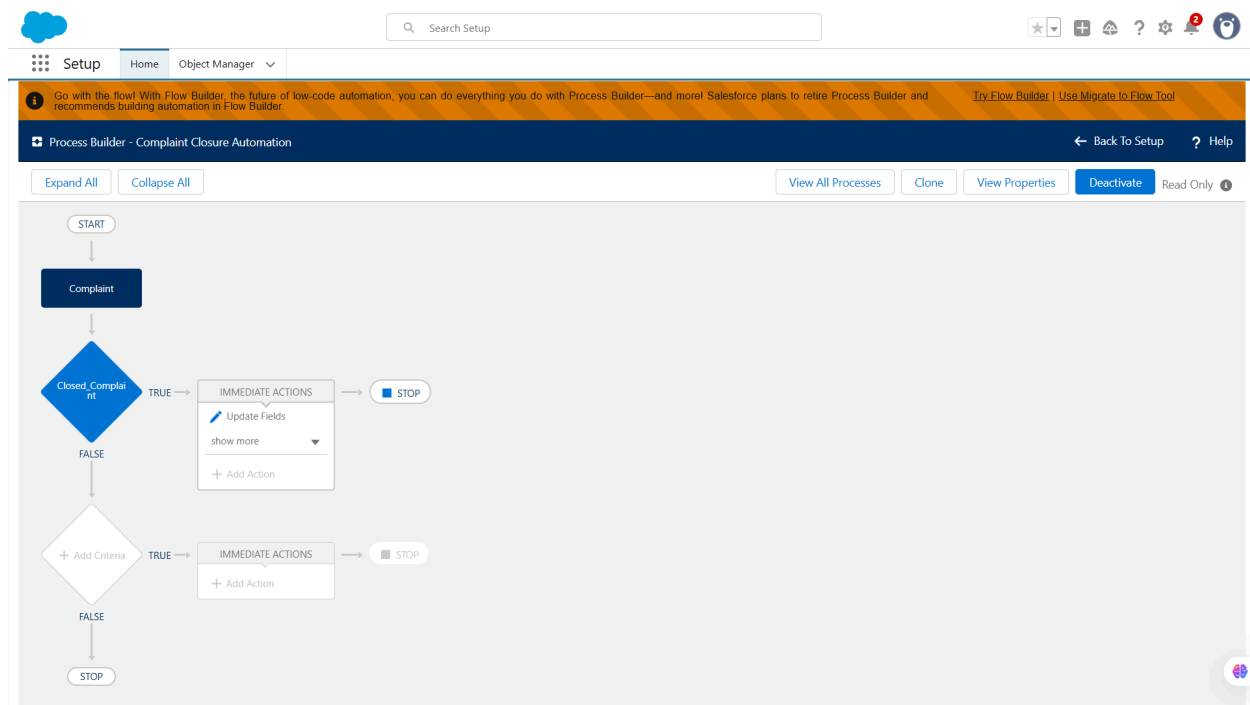
3. Process Builder

Use Case:

Process Builder is more advanced than Workflow Rules and allows multi-step automation with complex logic. For example, when a complaint is closed, update related Feedback records and notify the customer.

Implementation:

- **Setup → Process Builder → New → Select Object (Complaints)**
- Define **Start Condition**: e.g., when a record is created or edited
- **Add Immediate Actions**:
 - Update fields
 - Send email
 - Call Flow



4. Approval Process

Use Case:

Approval Processes are used to get managerial or departmental approval before performing critical actions. Example: High-value complaints (say, complaints with refunds above \$500) need manager approval before closure.

Implementation:

- **Setup → Approval Processes → Complaints → New Approval Process**

- Steps:
 1. Define entry criteria
 2. Set approvers
 3. Define actions for approved/rejected cases

The screenshot shows the Salesforce Setup interface for 'Approval Processes'. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Approval Processes' and shows the configuration for a specific process named 'Complaint: Complaint Approval Process'. The process is currently 'Active'.

Process Definition Detail

Process Name	Complaint Approval Process	Active	✓
Unique Name	Complaint_Approval_Process	Next Automated Approver Determined By	
Description			
Entry Criteria	Complaint: Priority EQUALS High		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Complaint Owner		
Created By	Samyak Jain, 9/25/2025, 11:19 PM	Modified By	Samyak Jain, 9/25/2025, 11:20 PM

Initial Submission Actions

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Step 1			User Manager	Final Rejection

Final Approval Actions

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

Final Rejection Actions

Action	Type	Description

5. Flow Builder

Use Case:

Flows are the most flexible automation tool. You can:

- **Screen Flows:** Guide users through complaint entry or feedback collection.
- **Record-Triggered Flows:** Automate updates when a complaint is created or edited.
- **Scheduled Flows:** Run periodic checks (e.g., send weekly pending complaint report).
- **Auto-launched Flows:** Trigger from Process Builder or button click.

Implementation Example (Record-Triggered Flow):

- **Object:** Complaints
- **Trigger:** When record is created or updated
- **Logic:**
 - If **Status = Resolved** → update Feedback object with “Request Feedback”
 - Send Email Alert to Customer

The screenshot displays the Salesforce Flow Builder interface for a 'Record-Triggered Flow' named 'Create Feedback - V1'. The flow is configured with the following steps:

- Record-Triggered Flow Start:** Object: Complaint, Trigger: A record is created or updated, Conditions: 1, Optimize for: Actions and Related Records.
- Run Immediately:** A connector step following the start.
- Create Feedback:** An action step to create records.
- End:** The final step of the flow.

The right-hand pane shows the configuration for the 'Create Records' action:

- * Label:** Create Feedback
- * API Name:** Create_Feedback
- Description:** (Empty text area)
- * How to set record field values:** From a Record Variable (Dropdown menu)
- How Many Records to Create:** One (Selected), Multiple (Unselected)
- Create a Record from These Values:**
 - * Record:** Triggering Complaint_c (Selected from a dropdown)
- Update Existing Record:** Disabled (Toggle switch)

6. Email Alerts

Use Case:

Send automated notifications when certain actions occur. For example, when a complaint is escalated, notify the manager or customer.

Implementation:

- **Setup → Email Alerts → New Email Alert**
- Select Object: Complaints

- Select Email Template
- Define Recipients

The screenshot shows the Salesforce Setup interface for Classic Email Templates. The left sidebar contains navigation links such as 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', 'Commerce Setup Assistant', 'Field Service Setup Home (Beta)', 'Hyperforce Assistant', 'Release Updates', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'Sales Cloud Everywhere', and 'ADMINISTRATION'. The main content area is titled 'Classic Email Templates' and displays the details for a custom email template named 'Complaint Resolved'. The details include the email template name, template unique name, encoding, author, and description. There are also buttons for 'Edit Properties', 'Edit HTML Version', 'Edit Text Version', 'Delete', and 'Clone'. A preview section shows the subject 'Your Complaint has been Resolved' and the HTML content: 'Hello {!User.FirstName}, A complaint has been resolved. Complaint Number: {!Complaint__c.Name} Status: {!Complaint__c.Status__c} Priority: {!Complaint__c.Priority__c} Please review this complaint immediately. Thanks, Customer Support Team'.

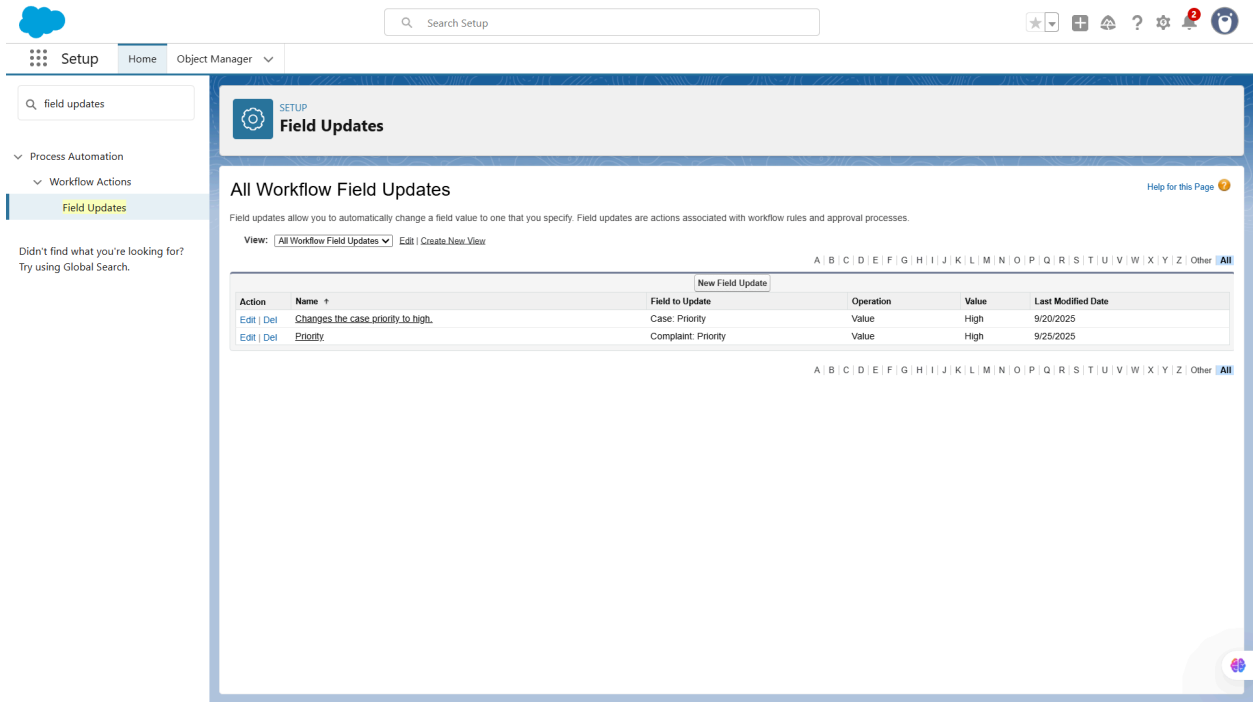
7. Field Updates

Use Case:

Automatically update field values based on criteria. Example: When a complaint is escalated, change its priority to “High.”

Implementation:

- Can be done via **Workflow Rules, Process Builder, or Flows**
- Action Type: **Update Record** → select field and value



The screenshot shows the Salesforce Setup page for Field Updates. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Field Updates' and includes a search bar, a list of workflow field updates, and a table of updates. The table has columns for Action, Name, Field to Update, Operation, Value, and Last Modified Date. Two updates are listed: 'Changes the case priority to high' and 'Complaint: Priority'.

Setup

Home

Object Manager

field updates

Process Automation

Workflow Actions

Field Updates

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Field Updates

All Workflow Field Updates

Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.

View: All Workflow Field Updates

Edit

Create New View

Action	Name	Field to Update	Operation	Value	Last Modified Date
Edit Del	Changes the case priority to high.	Case: Priority	Value	High	9/20/2025
Edit Del	Priority	Complaint: Priority	Value	High	9/25/2025

8. Tasks

Use Case:

Automatically assign tasks to users. Example: Create a task for support staff to follow up a complaint within 24 hours.

Implementation:

- Use **Workflow Rules, Process Builder, or Flow**
- Define Task properties: subject, due date, assignee

9. Custom Notifications

Use Case:

Notify users in Salesforce or mobile app when specific events occur. Example: Notify a support agent when a complaint is reassigned.

Implementation:

- **Setup → Custom Notifications → New**
- Define Notification Type
- Add to **Workflow/Process/Flow**



Search Setup



Setup

Home

Object Manager

custom n

Notification Builder

Custom Notifications

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SETUP

Custom Notifications



When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.

Custom Notification Types

New

Send custom notifications using [Flows](#) or [Process Builder](#)

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE	
Complaint Reassignment Alert	Complaint_Reassignment_Alert		✓	✓	▼
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓		▼

