

Phase 4: Process Automation

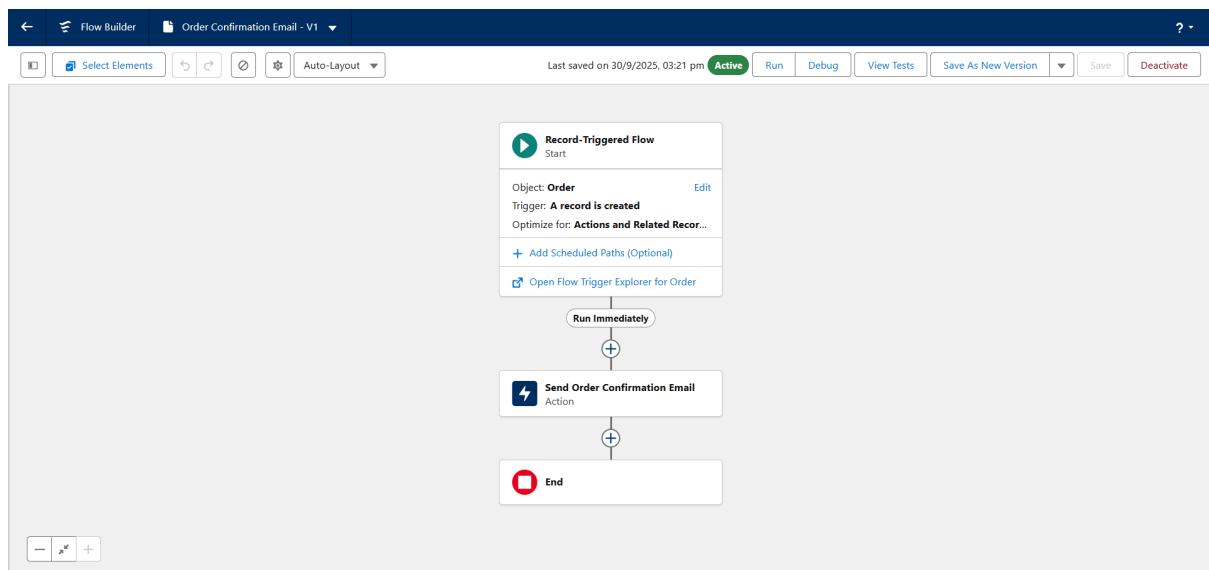
This phase focused on bringing the Retail CRM application to life by automating key business processes using Salesforce's automation tools. Two core automations were built: a record-triggered flow to handle customer notifications and an approval process to manage high-value orders, ensuring both efficiency and proper governance.

1. Automation 1: New Order Confirmation Email (Flow)

Description:

A record-triggered flow was created to automatically send a confirmation email to the customer's primary contact when a new order is created.

This was achieved using the **"Send Email" action** directly within the Flow Builder. A custom field, **Primary Contact Email**, was added to the **Account** object to facilitate this process, and a **Text Template** was built to create a dynamic and reusable email body.



2. Automation 2: High-Value Order Approval Process

Description:

An **approval process** was built to enforce business rules for high-value orders.

- Any order where the **Total Value for Approval > ₹50,000** is automatically **locked** and submitted to a designated approver.

- The process includes automated field updates to change the order's **Status** to *Pending Approval*, *Approved*, or *Rejected* as it moves through the approval lifecycle.

Note on Troubleshooting:

The standard **Order Amount** field was found to be locked by Salesforce. To overcome this, a custom currency field, **Total Value for Approval**, was created to serve as the entry criteria. This demonstrated a practical approach to handling platform limitations.

The first screenshot shows the 'Process Definition Detail' for the 'High Value Order Approval' process. Key details include:

- Process Name:** High Value Order Approval
- Unique Name:** High_Value_Order_Approval
- Description:** Order: Total Value for Approval GREATER THAN 50000
- Entry Criteria:** Order: Total Value for Approval GREATER THAN 50000
- Record Editability:** Administrator OR Current Approver
- Approval Assignment Email Template:** Sales_New_Customer_Email
- Initial Submission Actions:**
 - Action:** Record Lock, **Type:** Record Lock, **Description:** Lock the record from being edited
 - Action:** Field Update, **Type:** Field Update, **Description:** Update Status to Pending Approval
- Approval Steps:**

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Manager Approval	1	Manager Approval	Lock the record from being edited		User: Sathwik Manikyam	Final Rejection

The second screenshot shows the 'Approval Steps' and 'Final Approval Actions' for the same process. Key details include:

- Approval Steps:**

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Manager Approval	1	Manager Approval	Lock the record from being edited		User: Sathwik Manikyam	Final Rejection
- Final Approval Actions:**
 - Action:** Record Lock, **Type:** Record Lock, **Description:** Lock the record from being edited
 - Action:** Field Update, **Type:** Field Update, **Description:** Update Status to Approved
- Final Rejection Actions:**
 - Action:** Record Lock, **Type:** Record Lock, **Description:** Unlock the record for editing
 - Action:** Field Update, **Type:** Field Update, **Description:** Update Status to Rejected
- Recall Actions:**
 - Action:** Record Lock, **Type:** Record Lock, **Description:** Unlock the record for editing

3. Verification: Testing the Approval Process

Description:

The approval process was tested by logging in as the **Sales Agent** and creating an order with a **Total Value for Approval of ₹60,000**.

- Upon submission, the record was successfully locked.
- The order's **Status** was updated to *Pending Approval*.
- The approval request was routed to the designated approver.
- The **Approval History** related list confirmed the automation was working as designed.

Logged in as Agent Sales (sales.agent@sathwikretail.com) | Log out as Agent Sales

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Order 00000102

New Contact | New Opportunity | New Lead

Account Name: Grand Hotels & Resorts Ltd

Contract Number

Order Start Date: 30/09/2025

Status: Pending Approval

Order Amount: ₹0.00

✓

✓

Pending Approval

Approved

Rejected

Mark Status as Complete

Related

Details

Order Products (0)

Add Products | Edit Products

Approval History (2)

Step Name	Date	Status	Assigned To
Manager Approval	01/10/2025, 12:42 am	Pending	Sathwik Manikyam
Approval Request Submitted	01/10/2025, 12:42 am	Submitted	Agent Sales

Activity

Calendar, Mail, Chat, Task, Email

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

To Do List