

Phase 4: Process Automation (Admin)

- **Validation Rules**

- Example: End Date must be after Start Date.
- Leave balance must be sufficient before submission.

The screenshot shows the Salesforce Setup interface for the 'Leave Application' object. The left sidebar lists various setup options, and the main area displays a table of validation rules. The table has columns for Rule Name, Error Location, Error Message, Active status, and Modified By. There are 6 rules listed, all created by SHASHANK GUPTA on 9/20/2025.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
EndDate_After_StartDate	End Date	End Date must be after Start Date.	✓	SHASHANK GUPTA, 9/20/2025, 1:57 AM
LeaveType_Required	Leave Type	Please select a Leave Type.	✓	SHASHANK GUPTA, 9/20/2025, 2:09 AM
Max_Consecutive_Leave	End Date	You cannot apply for more than 15 consecutive days of leave.	✓	SHASHANK GUPTA, 9/20/2025, 2:07 AM
Maximum_Leave_Days	End Date	Leave cannot exceed 30 days.	✓	SHASHANK GUPTA, 9/20/2025, 2:02 AM
No_Past_Start_Date	Start Date	Leave cannot start in the past.	✓	SHASHANK GUPTA, 9/20/2025, 2:01 AM
Reason_Required_Long_Leave	Reason	Please provide a reason for leave longer than 5 days.	✓	SHASHANK GUPTA, 9/20/2025, 2:03 AM

- **Workflow Rules**

- Auto-send email to Manager when a leave request is created. *(Replaced by Flow Builder for advanced automation.)*

- **Process Builder**

- Previously used to auto-update Leave Status. *(Replaced by Flow Builder.)*

- **Approval Process**

- Leave requests > 5 days are automatically sent for Manager approval.

The screenshot shows the Salesforce Setup interface for an Approval Process. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Approval Processes' and displays the configuration for a 'Leave Application: Leave Approval Process'.

Process Definition Detail

Process Name	Leave Approval Process	Active	✓
Unique Name	Leave_Approval_Process	Next Automated Approver Determined By	Manager of Record Submitter
Description			
Entry Criteria	Leave Application: Status EQUALS Submitted		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	Appointment for Unauthenticated User using Appointment Types - For Amazon Chime		
Initial Submitters	Leave Application Owner		
Created By	SHASHANK GUPTA	Modified By	SHASHANK GUPTA
	9/11/2025, 1:36 AM		9/11/2025, 3:00 AM

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
Manager Approval	1				User: SHASHANK GUPTA	Final Rejection

- **Flow Builder**

- **Screen Flow:** Employee leave request submission form.
- **Record-Triggered Flow:** Automatically updates remaining leave balance after approval.
- **Scheduled Flow:** Can send periodic leave balance reminders.
- **Auto-Launched Flow:** Triggered by leave request submission to update statuses and notify managers.

- **Email Alerts**

- Notify Employee on approval or rejection.
- Notify Manager when a new leave request is submitted.

The screenshot displays the Salesforce Setup interface for 'Approval Processes'. The left sidebar shows the navigation menu with 'Approval Processes' selected. The main content area is titled 'Approval Processes' and contains the following sections:

- Approval Steps:** A table with one step:

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Manager Approval			User: SHASHANK GUPTA	Final Rejection
- Final Approval Actions:** A table with three actions:

Action	Type	Description
Edit Remove	Record Lock	Lock the record from being edited
Edit Remove	Email Alert	Notify Employee Approved
Edit Remove	Field Update	Update Status to Approved
- Final Rejection Actions:** A table with three actions:

Action	Type	Description
Edit Remove	Record Lock	Unlock the record for editing
Edit Remove	Email Alert	Notify Employee Rejected
Edit Remove	Field Update	Update Status to Rejected
- Recall Actions:** A table with one action:

Action	Type	Description
	Record Lock	Unlock the record for editing

- **Field Updates**
 - Update Leave Status to “Approved” or “Rejected” after Manager action.
- **Tasks**
 - Create tasks for HR to update leave records after approvals/rejections.
- **Custom Notifications**
 - Send in-app notifications to Employee and Manager after approval or rejection.