

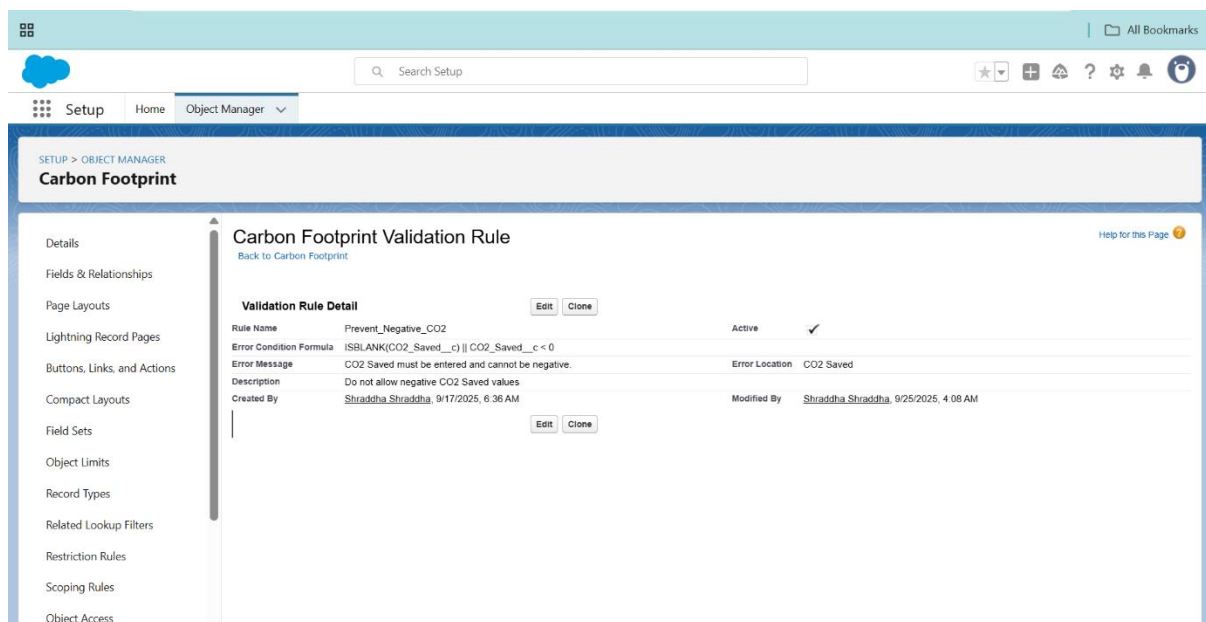
Phase 4: Process Automation

Step 1: Validation Rules

Validation Rules prevent wrong or incomplete data from being saved.

A. CarbonFootprint – Prevent Negative CO₂ Saved

- Goal: Ensure users don't enter negative values.
- Setup → Object Manager → CarbonFootprint__c → Validation Rules → New.
- Rule Name: Prevent_Negative_CO2
- Formula:
$$\text{ISBLANK}(\text{CO2_Saved_c}) \parallel \text{CO2_Saved_c} < 0$$
- Error Message: "CO₂ Saved cannot be negative."
- Error Location: Field → CO₂_Saved__c.
- Save.

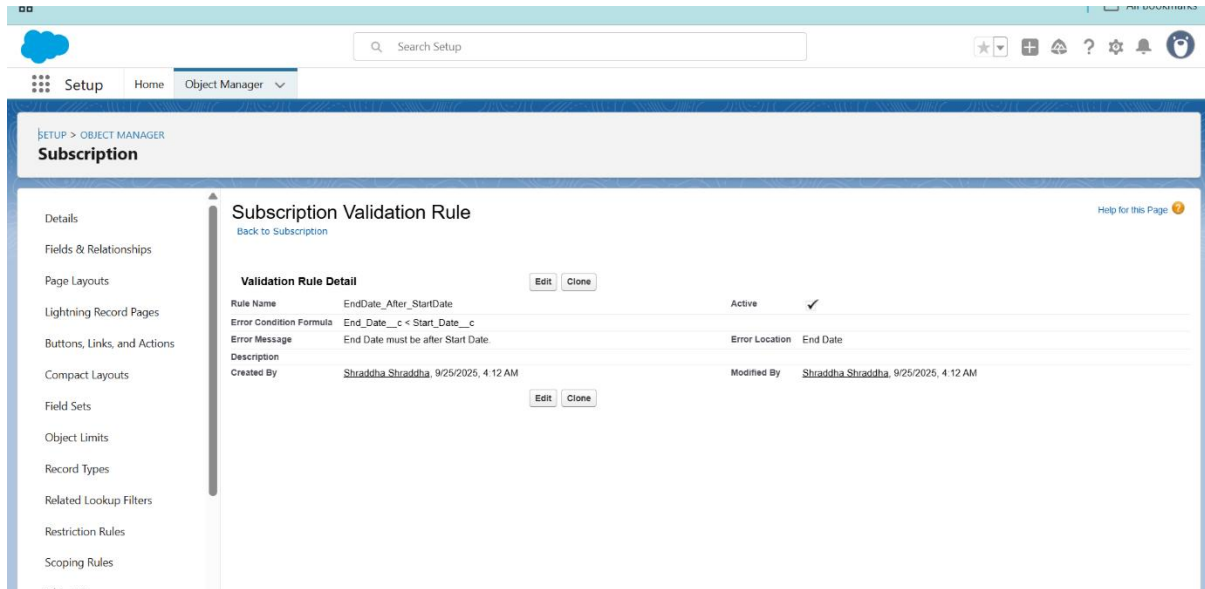


B. Subscription – End Date Must Be After Start Date

Goal: Ensure that a subscription's End Date is always after the Start Date.

- Setup → Object Manager → Subscription__c → Validation Rules → New.
- Rule Name: EndDate_After_StartDate
- Formula:
$$\text{End_Date_c} < \text{Start_Date_c}$$

- Error Message:
“End Date must be after Start Date.”
- Error Location: Field → End_Date__c.

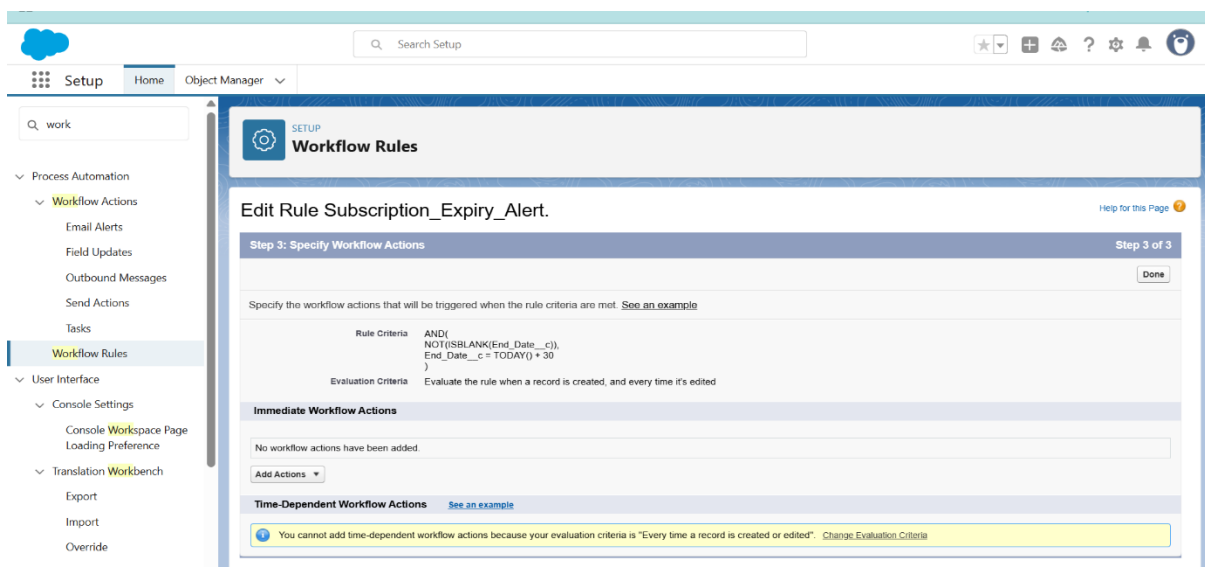


Step 2: Workflow Rule + Email Alert

Workflow Rule: Notify when a Subscription is expiring.

- Setup → Workflow Rules → New Rule.
- Object: Subscription__c.
- Rule Name: Subscription_Expiry_Alert.
- Rule Criteria:

$\text{AND}(\text{NOT}(\text{ISBLANK}(\text{End_Date_c})), \text{End_Date_c} = \text{TODAY}() + 30)$

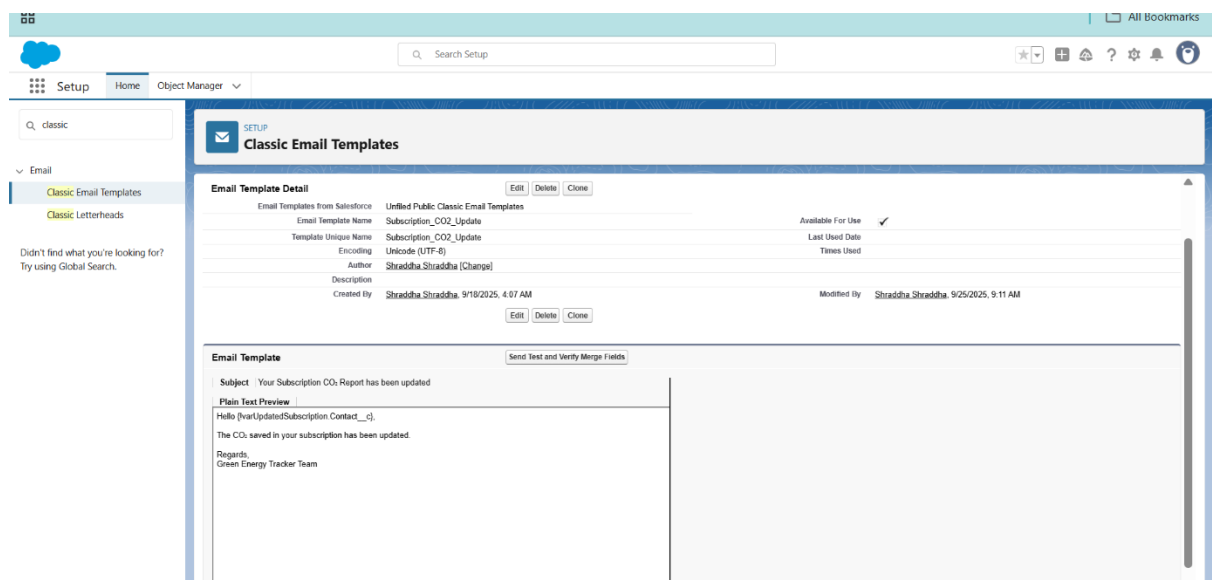


Create Email Template

- Go to **Setup** → **Classic Email Templates** → **New**.
- **Folder:** Unfiled Public.
- **Template Name:** Subscription_CO2_Update
- **Subject:** CO₂ Update Notification
- **Body:**

Hello {!Subscription__c.Contact__c},
Your subscription "{!Subscription__c.Name}" has a new CO₂ update.
Current CO₂: {!Subscription__c.CO2__c} kg.
Thank you,
GreenEnergyTracker Team

- Save the template.



Step 3: Process Builder

Automation Process Builder automates record updates or actions.

Start the Process

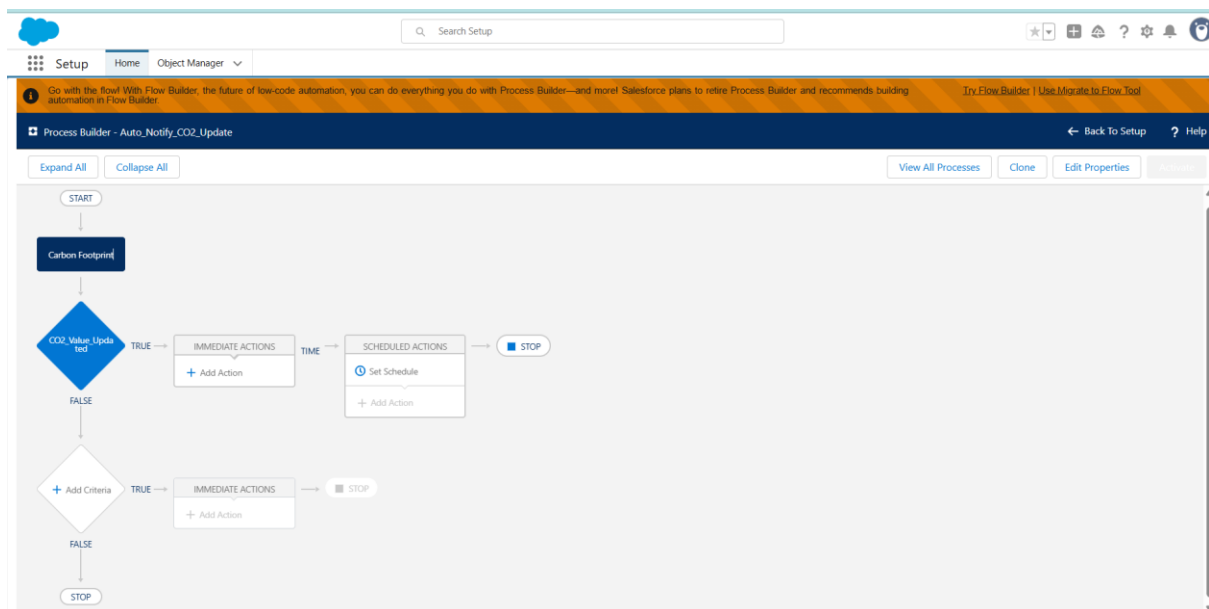
- **Object:** Subscription__c
- **Start the process:** when a record is created or edited.

Define Criteria

Use “Formula Evaluates to True”

1. Criteria Name: CO2_Value_Updated
2. Criteria for Executing Actions: Conditions are met → Choose “Formula evaluates to true”
3. Formula:
4. ISCHANGED([Subscription__c].CO2__c)
5. Do not select the advanced option “Only when specified changes are made to the record.”

This allows ISCHANGED to work properly.



Step 4: Record-Triggered Flow

Flows are more advanced automation.

Example: Update_Total_CO2_Subscription

Create a New Flow

1. Go to **Setup** → **Flows** → **New Flow**.
2. Choose **Record-Triggered Flow**.
3. Click **Create**

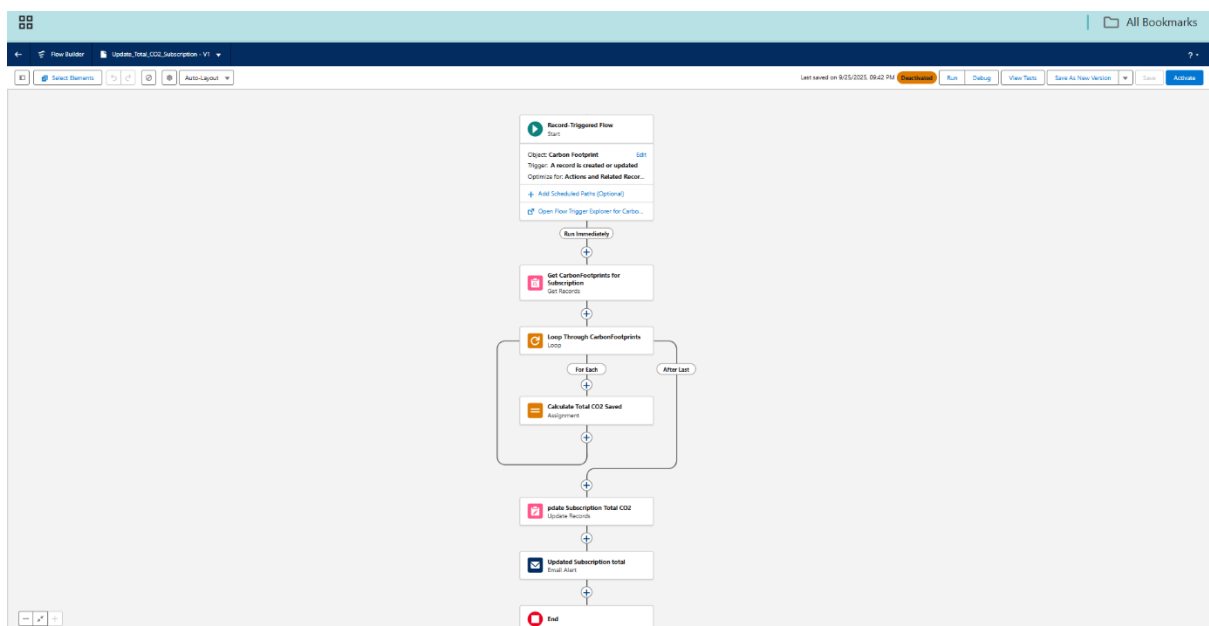
Configure Trigger

1. **Object:** Carbon_Footprint__c
2. **Trigger:** A record is created or updated
 - Optionally: Run **only if a record is updated to meet condition** (e.g., CO₂ value is not null).
3. **Run the Flow:** After the record is saved (so you can update related subscription records).

Add Flow Logic

1. **Get Records:** (Optional, if you need all CO₂ records for the subscription)
 - Object: Carbon_Footprint__c
 - Filter: Subscription__c = {!\$Record.Subscription__c}
 - Store all records → All Records
2. **Assignment:** Calculate total CO₂
 - Loop through all Carbon_Footprint__c records (if using a collection)
 - Sum the CO₂ values → store in a variable varTotalCO2
3. **Update Records:**
 - **Record to Update:** Subscription__c related to the Carbon_Footprint__c record (\$Record.Subscription__c)
 - **Field:** Total_CO2__c = {!varTotalCO2}

Save & Activate



Step 5: Approval Process

Approval Processes let managers approve/reject records.

Create Approval Process

1. Go to Setup → Approval Processes → New Approval Process.
2. Choose Use Standard Setup Wizard.
3. Object: Subscription__c
4. Name: High_Cost_Subscription_Approval
5. Unique Name: High_Cost_Subscription_Approval
6. Description: Approval process for subscriptions with cost greater than 500.

The screenshot shows the Salesforce Setup interface for the 'High_Cost_Subscription_Approval' process. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Approval Processes' and includes a search bar. Below the search bar, there are sections for 'Process Definition Detail', 'Initial Submission Actions', 'Approval Steps', 'Final Approval Actions', 'Final Rejection Actions', and 'Recall Actions'. The 'Process Definition Detail' section shows the process name, unique name, description, entry criteria, record editability, approval assignment email template, initial submitter, and created by. The 'Approval Steps' section shows a table with columns for Action, Step Number, Name, Description, Criteria, Assigned Approver, and Reject Behavior. The 'Final Approval Actions', 'Final Rejection Actions', and 'Recall Actions' sections each show a table with columns for Action, Type, and Description.

Setup

Approval Processes

Process Definition Detail

Process Name: High_Cost_Subscription_Approval

Unique Name: High_Cost_Subscription_Approval

Description: Approval process for subscriptions with cost greater than 500

Entry Criteria: Cost_c > 500

Record Editability: Administrator ONLY

Approval Assignment Email Template: Subscription Approval Request

Initial Submitter: Subscription Owner

Created By: Shradha Shradha

Initial Submission Actions

Approval Steps

Final Approval Actions

Final Rejection Actions

Recall Actions