

Phase 4: Process Automation (Admin)

Process Automation in Salesforce allows admins to **automate repetitive tasks, approvals, notifications, and workflows** to improve efficiency and accuracy. This phase ensures your org operates **smoothly with minimal manual intervention**.

1. Validation Rules

Purpose:

- Ensure data entered by users meets business criteria.
- Prevent incorrect or incomplete records from being saved.

Use Cases:

- Ensure Plastic Waste weight is >0.
- Prevent orders from being submitted without selecting a product.

Example Formula:

ISBLANK(Product__Ordered__c)

- Displays an error if a product is not selected.

2. Workflow Rules

Purpose:

- Automate actions based on specific criteria when a record is created or edited.

Actions Include:

- Email alerts
- Field updates
- Task creation
- Outbound messages

Use Cases:

- Send email to Recycling Center manager when new plastic waste is assigned.
- Update Order Status automatically when shipment is created.

3. Process Builder

Purpose:

- A visual tool to automate **more complex processes** than workflow rules.
- Can update multiple objects, create records, or trigger flows.

Use Cases:

- Automatically create a shipment record when an order is approved.
- Update the product inventory after recycling production is complete.

4. Approval Process

Purpose:

- Automate **record approvals** within Salesforce.

Use Cases:

- Approve large or high-priority orders.
- Require manager approval for releasing recycled products to VIP customers.

Steps Include:

1. Define entry criteria for approval (e.g., Order > 500 kg).
2. Assign approvers.
3. Set up actions for approved, rejected, or recalled records.

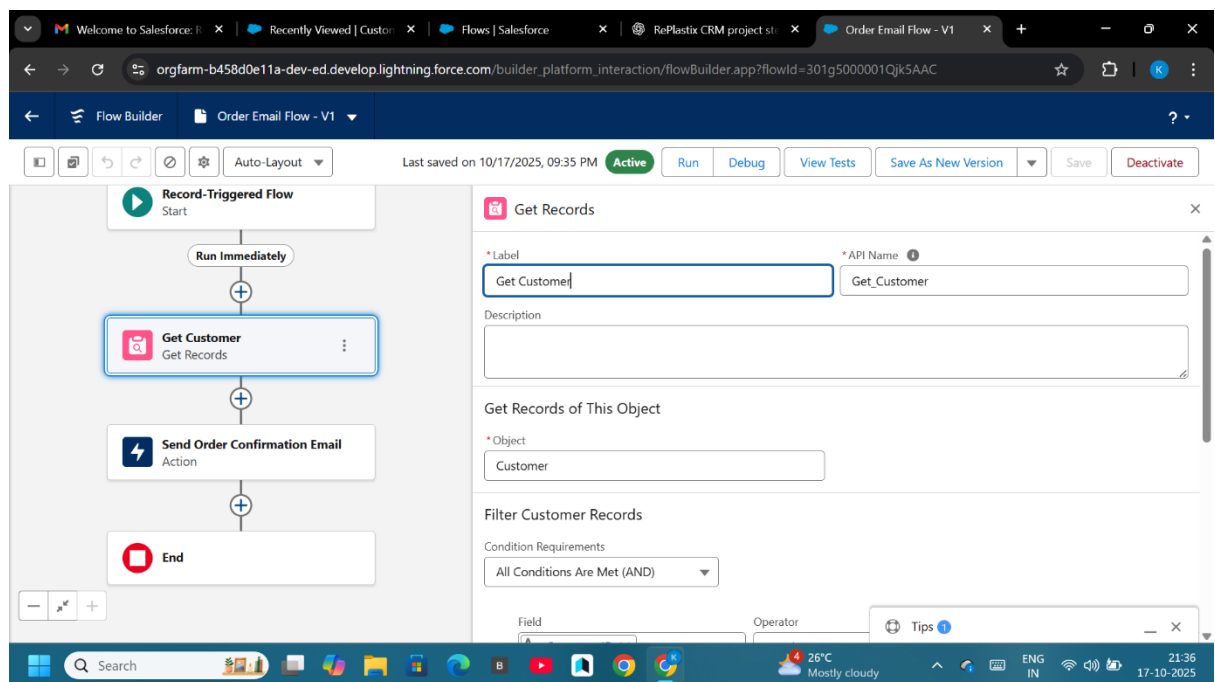
5. Flow Builder

Purpose:

- Salesforce's most powerful automation tool for **complex, multi-step processes**.

Types of Flows:

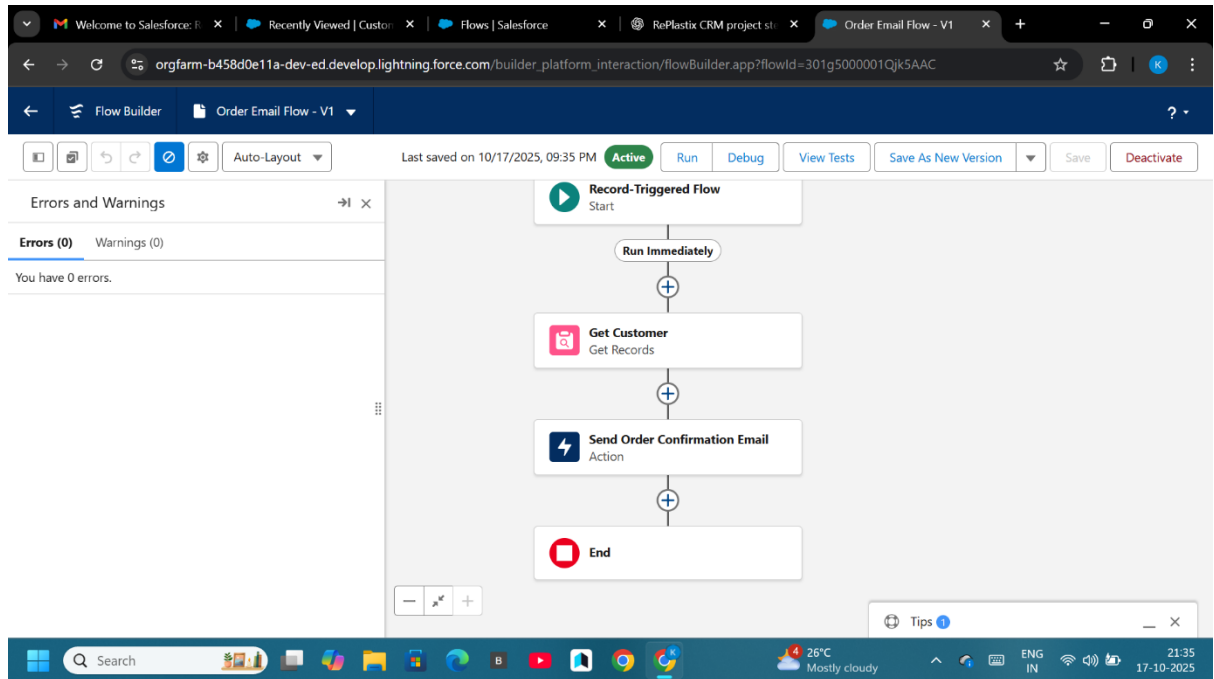
1. **Screen Flow:** User-interactive flows (forms, surveys).
2. **Record-Triggered Flow:** Triggered automatically when a record is created or updated.
3. **Scheduled Flow:** Runs at a scheduled date/time.
4. **Auto-Launched Flow:** Runs in the background, no user interaction.



Use Cases:

- Send automated notifications to customers when order status changes.

- Update multiple related records after production completion.
- Calculate and update inventory levels automatically.



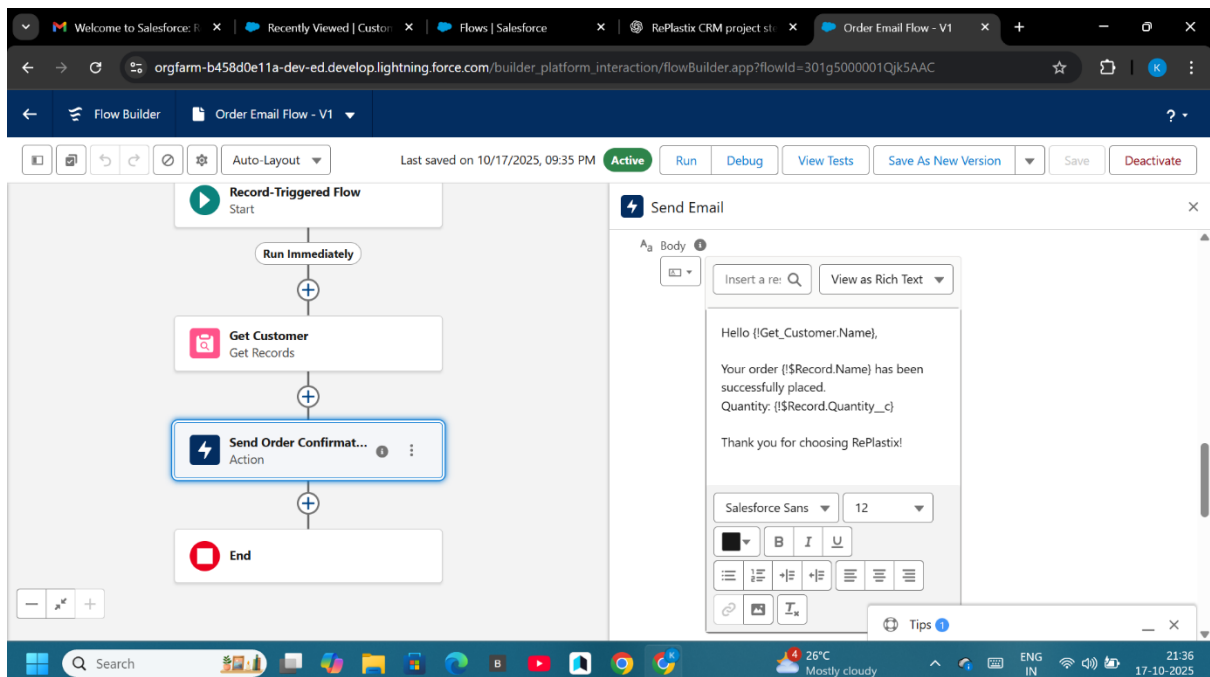
6. Email Alerts

Purpose:

- Automatically send email notifications based on workflows, processes, or flows.

Use Cases:

- Notify customers when orders are shipped.
- Alert recycling center managers when waste collection exceeds a threshold.



7. Field Updates

Purpose:

- Automatically change field values based on specific conditions.

Use Cases:

- Update Order Status from **Pending** to **In Progress** when production starts.
- Change Plastic Waste status to **Processed** after recycling.

8. Tasks

Purpose:

- Automatically create tasks for users as part of a workflow or process.

Use Cases:

- Assign follow-up calls to sales staff after an order is placed.
- Create maintenance tasks for recycling center equipment.

9. Custom Notifications

Purpose:

- Send **in-app notifications** to users to alert them about specific events.

Use Cases:

- Notify managers when orders require approval.
- Alert users about overdue tasks or pending shipments.
- Complement email alerts for faster response.

Conclusion of Phase 4

Process Automation ensures that Salesforce operates efficiently and reduces **manual work**. Key benefits include:

- Faster response times for approvals, notifications, and record updates.
- Consistency in business processes.
- Increased user productivity and reduced errors.