

Phase 4: Process Automation (Admin)

Project Title: Jewellery Store Management CMR

1• Validation Rules

Validation Rules ensure that the data entered into Salesforce records meets specific business criteria. They prevent incorrect or inconsistent data from being saved.

Examples for Jewellery Store:

- JewelleryStore Order__c: Total_Amount__c <= 0
 - Error Message: “Please Enter Correct Amount”
 - Ensures orders have a positive total amount.
- Inventory__c: Stock_Quantity__c <= 0
 - Error Message: “Inventory count cannot be less than zero”
 - Prevents stock from being negative.
- JewelleryStore Customer__c: NOT(CONTAINS(Email, "@gmail.com"))
 - Error Message: “Please fill Correct Gmail”
 - Ensures customer email follows a valid format.

Steps to create a validation rule:

1. Setup → Object Manager → Select the Object → Validation Rules → New.
2. Enter Rule Name, Error Condition Formula, and Error Message.
3. Choose error location (Field or Top of Page) → Save.

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'JewelleryStore Customer' and shows the 'Validation Rule Detail' for 'JewelleryStore Customer Validation Rule'. The rule is active and configured with the following details:

Validation Rule Detail		Active
Rule Name	Email	✓
Error Condition Formula	NOT CONTAINS(Email__c, "@gmail.com")	
Error Message	Please fill Correct Gmail	Error Location: Top of Page
Description		
Created By	Sundhar Lakshmi Vanshitha 9/20/2025, 6:17 AM	Modified By: Sundhar Lakshmi Vanshitha 9/20/2025, 6:17 AM

2. Workflow Rules

Workflow Rules automate standard internal processes. They can trigger Email Alerts, Field Updates, Tasks, or Outbound Messages when record conditions are met.

Example for Jewelry Store:

- When `Inventory__c.Stock_Quantity__c < 5`, send an email alert to the Inventory Manager.
- When `JewelryStore_Order__c.Status__c = Confirmed`, update a field `Order_Confirmed__c` to true.

3.Process Builder

Process Builder allows multi-step automation beyond what workflow rules can do. It can:

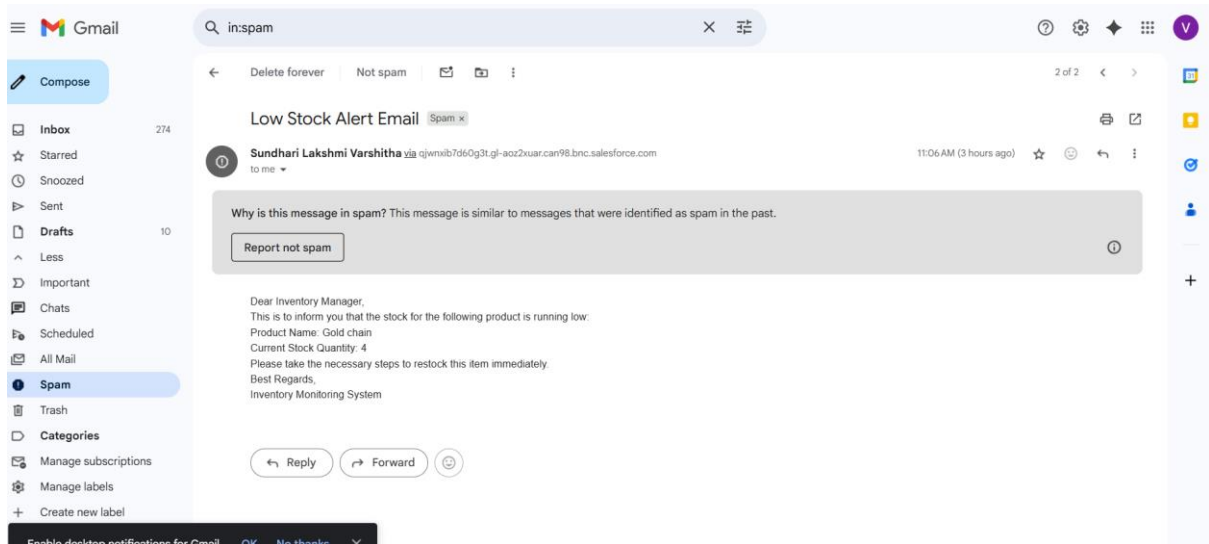
- Update related records
- Post to Chatter
- Launch Flows or Apex
- Send Email Alerts

Example for Jewelry Store:

- When `Total_Purchases__c` of a customer exceeds 1000, update `Loyalty_Status__c` to Gold.
- When `JewelryStore_Order__c.Status__c = Rejection`, notify the Sales team automatically.

Steps:

1. Setup → Process Builder → New → Name your process → Choose Object.
2. Define criteria → Add Immediate or Scheduled Actions.
3. Save & Activate.



4. Approval Process

Approval Processes manage record approvals in stages.

Examples:

- Orders above a certain amount require manager approval.
- Automated actions: update order status, send notification emails to approvers.

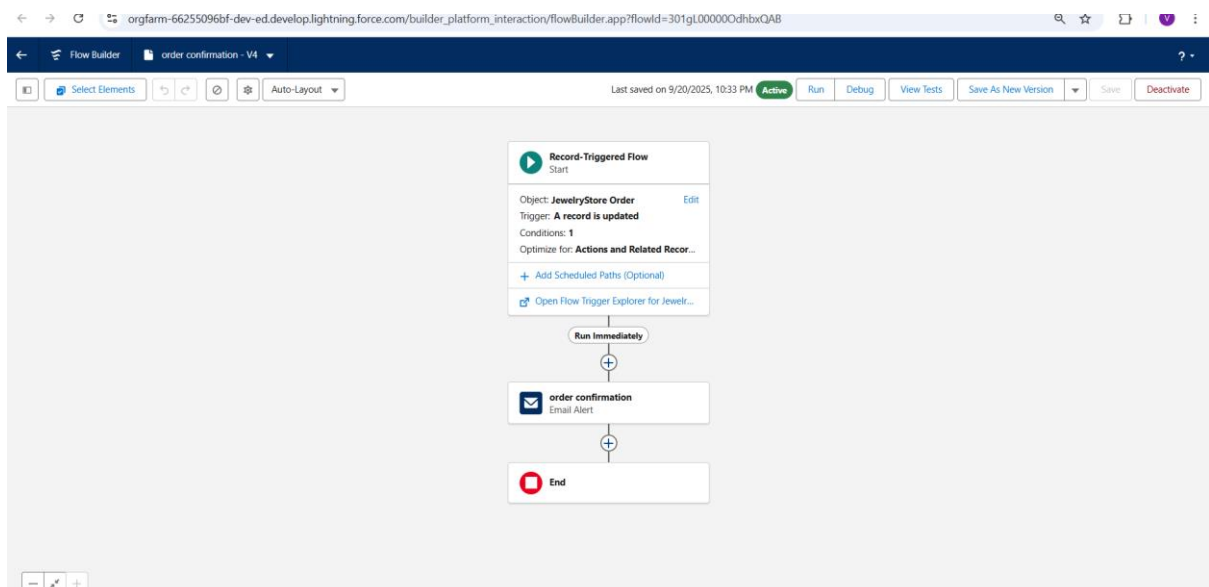
Useful for enforcing business policies and checks.

5.Flow Builder

Flow Implementations

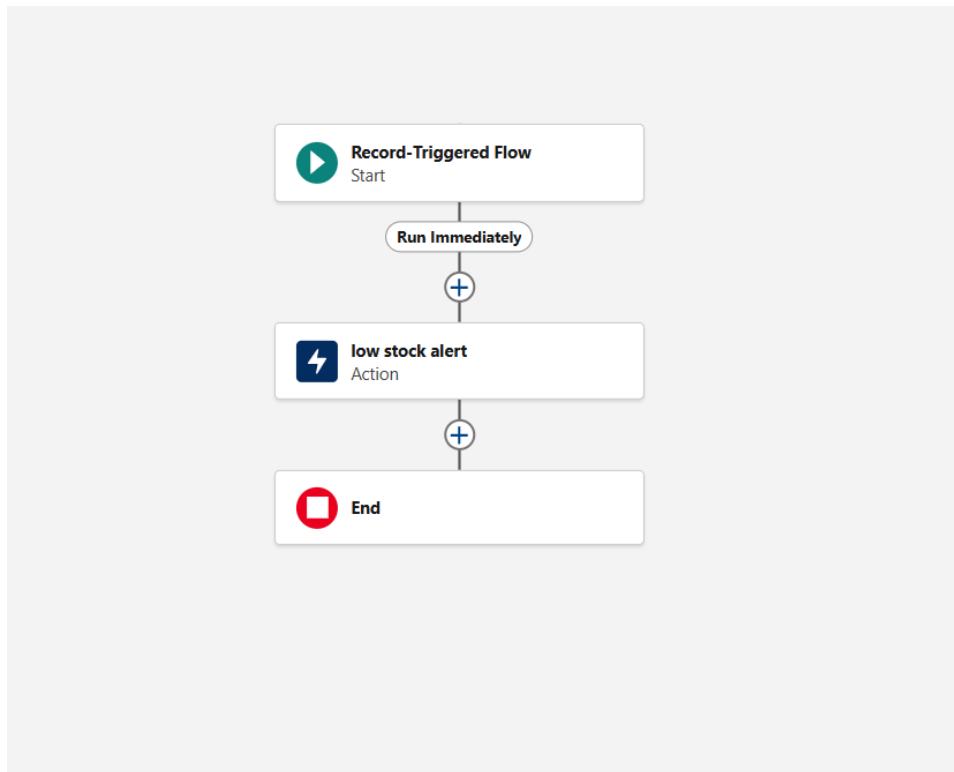
a. Order Confirmation Flow

- Triggered when an order is updated to Confirmed.
- Sends an Order Confirmation email to the related customer.



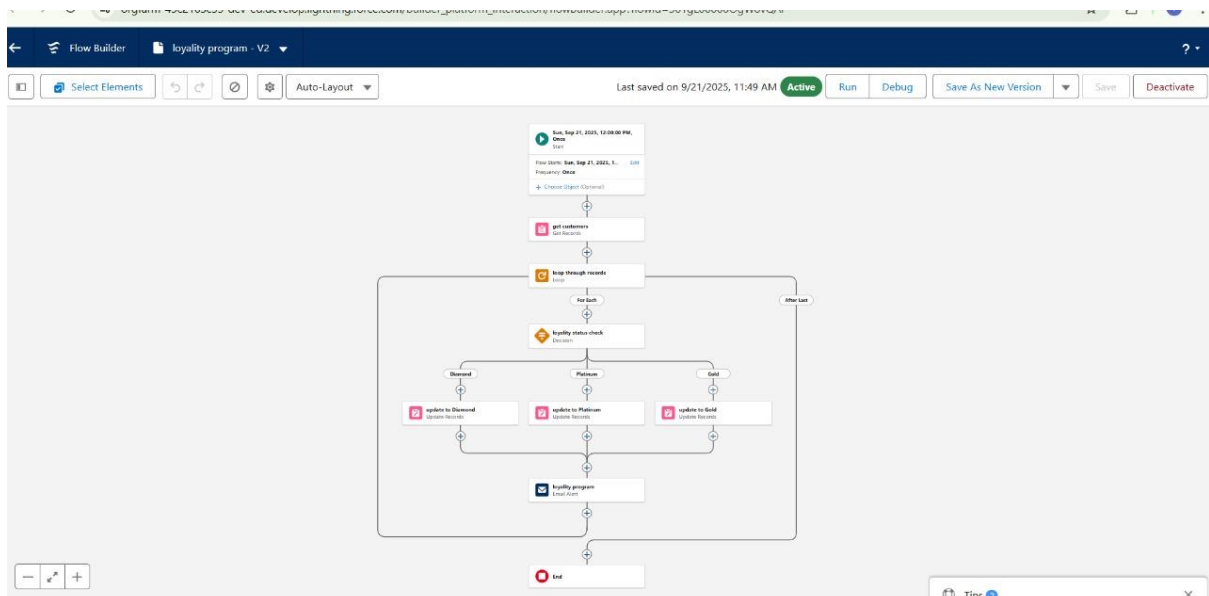
b. Stock Alert Flow

- Triggered when Inventory stock drops below 5.
- Sends Low Stock email to Inventory Manager.



c. Scheduled Flow:

- Loyalty Update
- Runs daily at midnight.
- Loops through customers and updates their Loyalty Status based on total purchases.

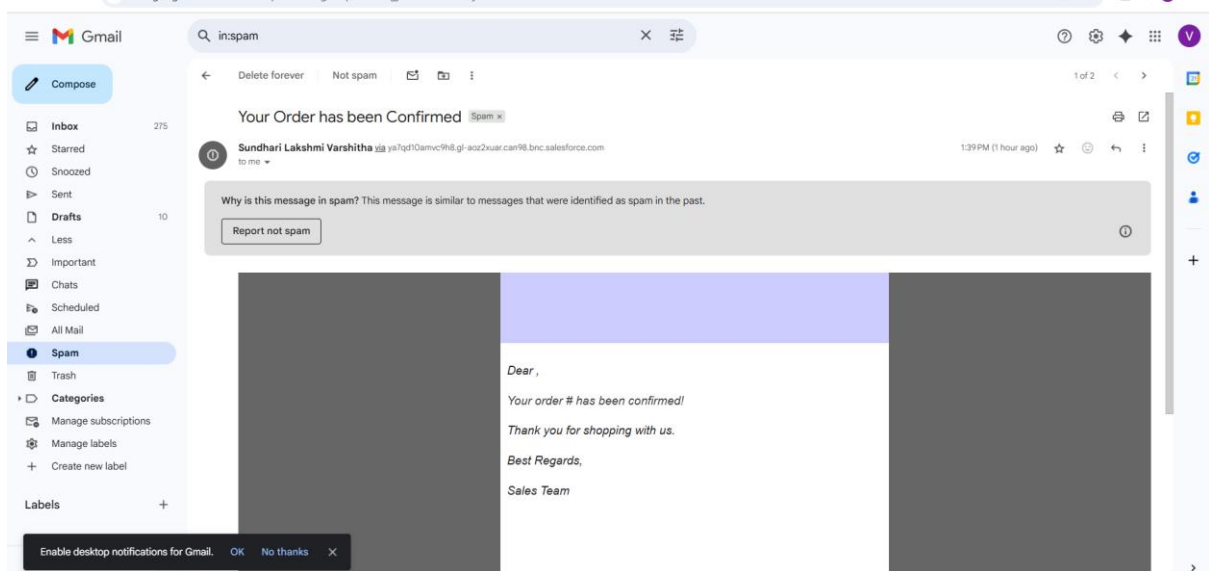


6. Email Alerts

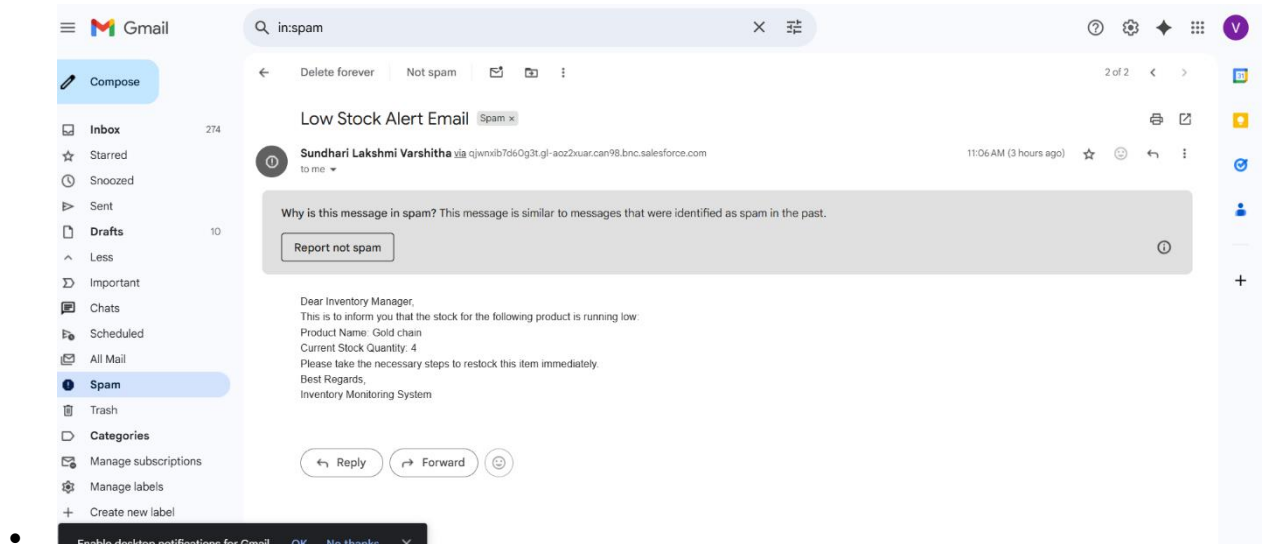
Send automated emails based on workflows, processes, or flows.

Examples:

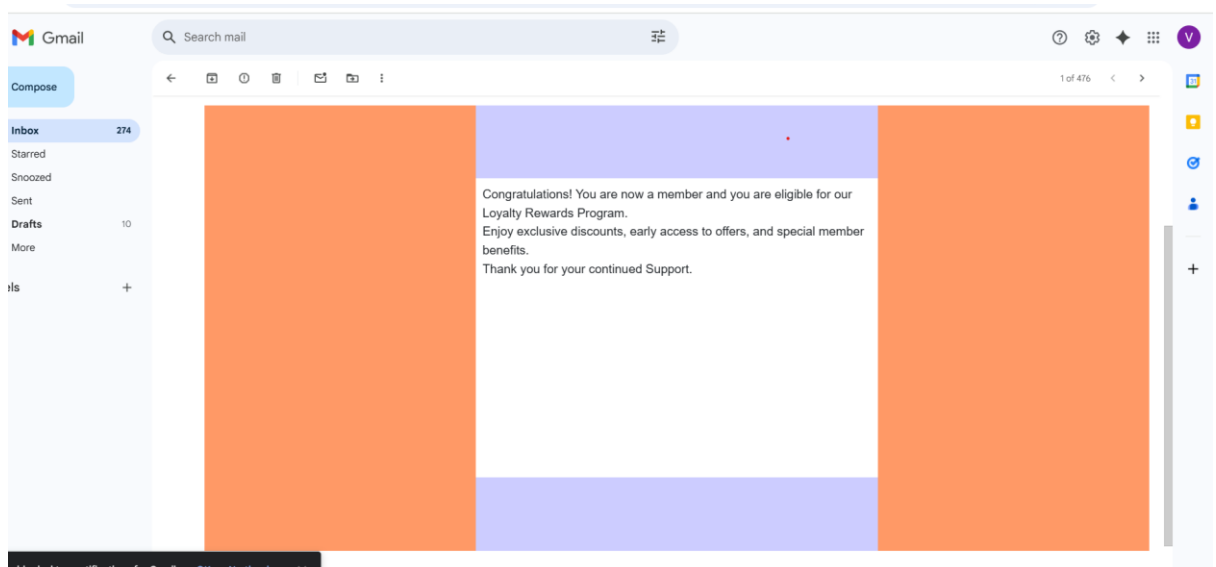
- Order Confirmation Email to customer.



- Low Stock Alert to Inventory Manager.



- Loyalty Program Email to qualifying customers.

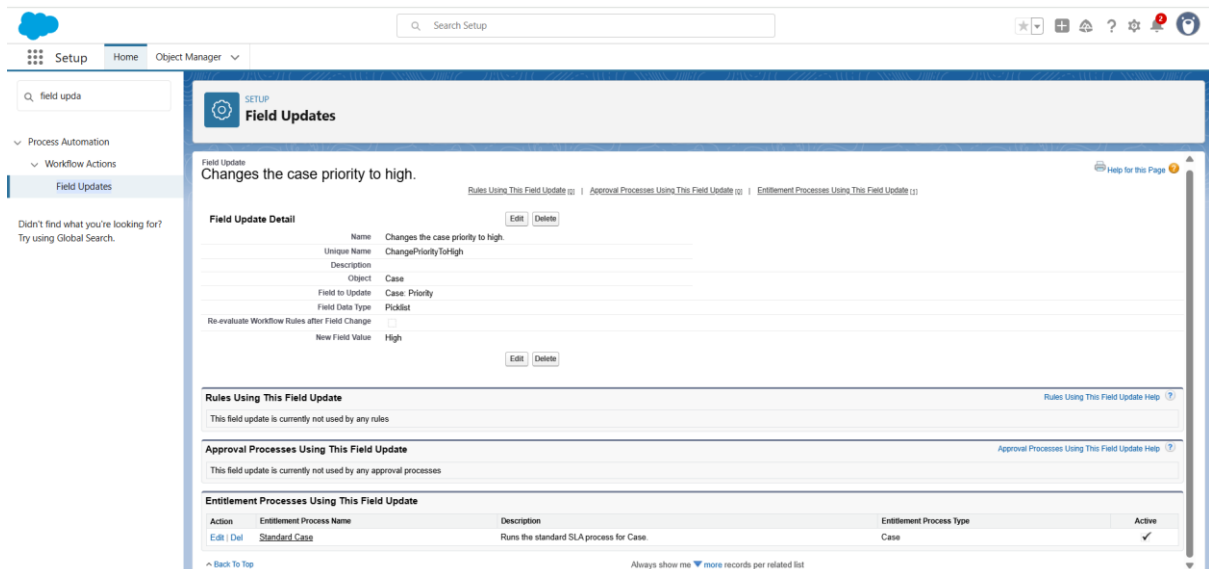


7. Field Updates

Automatically update field values when criteria are met.

Examples:

- Mark Order_Confirmed__c = true when an order is confirmed.
- Update loyalty status based on total purchases.



8. Custom Notifications

Send real-time notifications to users on desktop or mobile.

Examples:

- Alert sales managers when high-value orders are placed.
- Alert inventory managers when stock is critically low.

