Salesforce Project Phase-4 :- Process Automation (Admin)
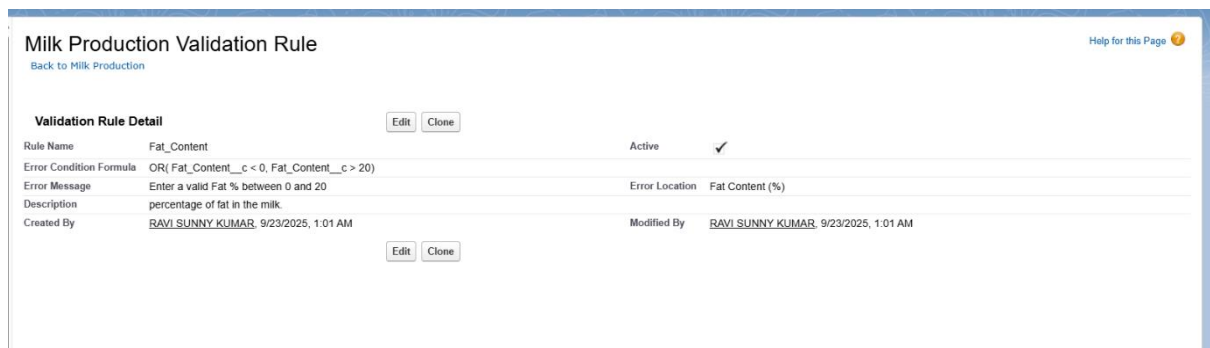
Title :- Dairy Management System Private Limited Using Salesforce CRM

Validation Rules for Your Project

1. Milk Production Object

- **Quantity must be greater than 0**
- **Quantity__c <= 0**

Error Message: **"Milk quantity must be greater than 0."**

- **Fat % must be between 0 and 100**
- **OR(Fat_Percentage__c < 0, Fat_Percentage__c > 100)**

Error Message: **"Enter a valid Fat % between 0 and 100."**

- **Collection Date cannot be in the future**
- **Collection_Date__c > TODAY()**

Error Message: **"Collection Date cannot be in the future."**

2. Cattle Object

- **DOB must be in the past**
- **DOB__c > TODAY()**

Error Message: **"Date of Birth cannot be in the future."**

- **Health Status required when Cattle is Active**
- **AND(IsActive__c = TRUE, ISBLANK(Health_Status__c))**

Error Message: **"Health Status is required for active cattle."**

Cattle Validation Rule
Back to Cattle

Help for this Page

Validation Rule Detail   Edit   Clone

Rule Name	Date_of_Birth	Active	✓
Error Condition Formula	Date_of_Birth__c < TODAY()		
Error Message	Date of Birth cannot be in the future.	Error Location	Date of Birth
Description	Date of Birth of the cattle.		
Created By	RAVI SUNNY KUMAR, 9/23/2025, 1:07 AM	Modified By	RAVI SUNNY KUMAR, 9/23/2025, 1:07 AM

Edit   Clone

3. Order Object

- **Order Quantity must be greater than 0**
- **Quantity__c <= 0**

Error Message: **"Order quantity must be greater than 0."**

- **Customer Orders cannot exceed available Inventory (basic check if you store stock in Inventory object)**
- **Quantity__c > Inventory__r.Stock_Quantity__c**

Error Message: **"Order exceeds available stock."**

- **Orders above 500 liters need approval**
  (This can be enforced by Approval Process, but as Validation Rule for data entry check)
- **Quantity__c > 500 && ISBLANK(Approval_Status__c)**

Error Message: **"Orders above 500 liters must be submitted for approval."**

4. Festival Offer Object

- **End Date must be after Start Date**

- **End_Date__c < Start_Date__c**

Error Message: **"End Date must be after Start Date."**

- **Discount % must be between 1 and 100**

- **OR(Discount__c <= 0, Discount__c > 100)**

Error Message: **"Discount must be between 1% and 100%."**

5. Inventory Object

- **Stock Quantity cannot be negative**

- **Stock_Quantity__c < 0**

Error Message: **"Stock quantity cannot be negative."**

- **Expiry Date must be in the future**

- **Expiry_Date__c < TODAY()**

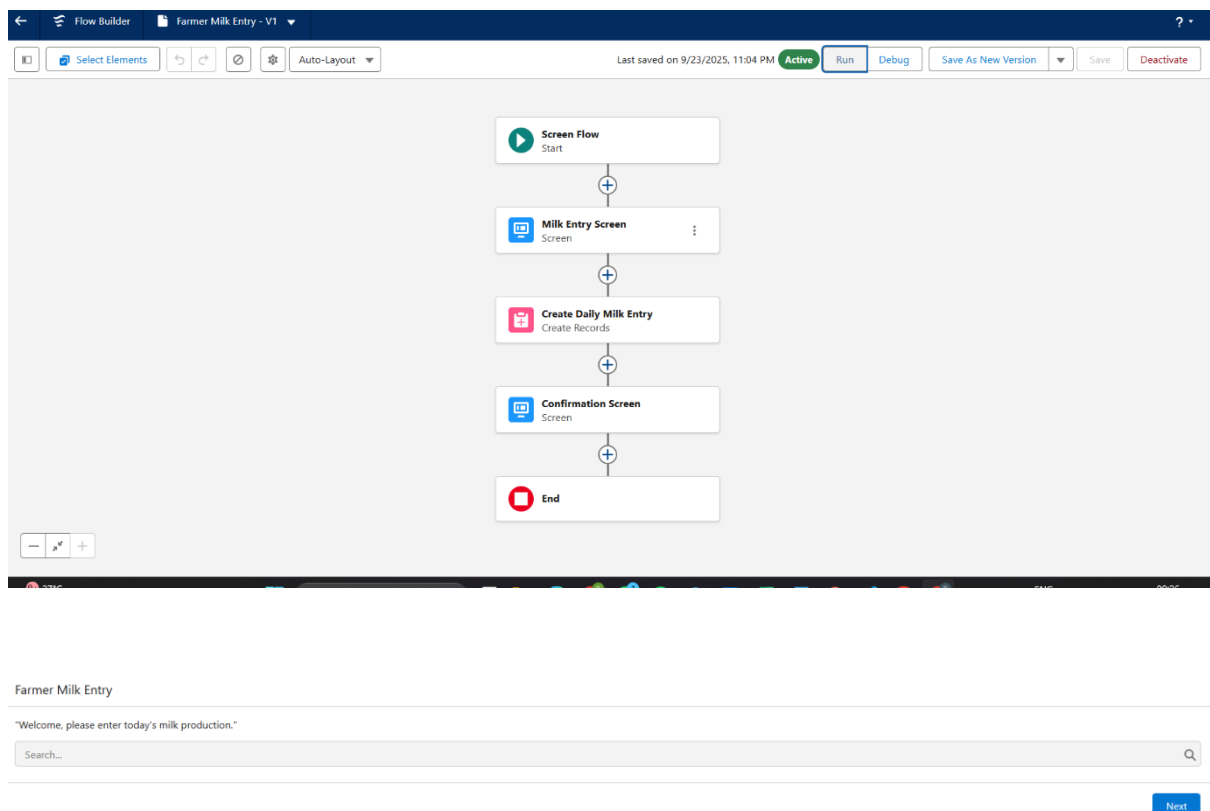*Error Message:* **"Expiry Date must be in the future."**

Flows

1. Screen Flows

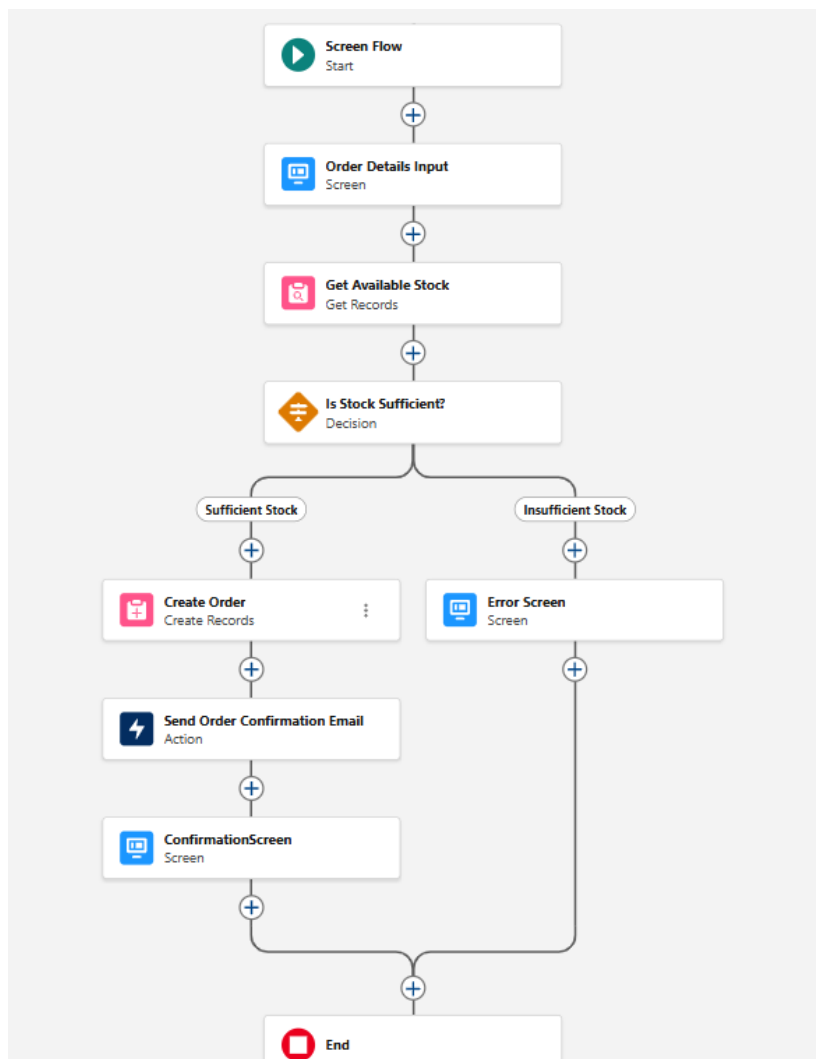**Purpose:** Collect data directly from users through guided screens.

A. Farmer Milk Entry Flow

- **Object:** Milk Production (child of Cattle)

- **Trigger:** User launches the flow.

- **Steps:**

  1. Farmer selects the **Cattle ID**.

  2. Enter **Milk Quantity** (validation: > 0 liters).

  3. Select **Date of collection** (default to today).

  4. Save record into **Milk Production object**.

  5. Optional: Display confirmation message.

- **Benefits:** Reduces manual data entry in Salesforce, ensures accurate milk records.

B. Customer/Distributor Order Creation Flow

- **Object:** Order

- **Trigger:** User launches the flow.

- **Steps:**

    1. Select **Customer/Distributor**.

    2. Enter **Product Type** and **Quantity**.

    3. System checks **available inventory**.

        - If stock insufficient → Show error screen.

        - If stock sufficient → Proceed.

    4. Save order record.

    5. Confirmation message/email alert.

- **Benefits:** Guided order creation, avoids manual mistakes.

Select Customer/Distributor

Search... 🔍

*Enter Quantity

[   ]
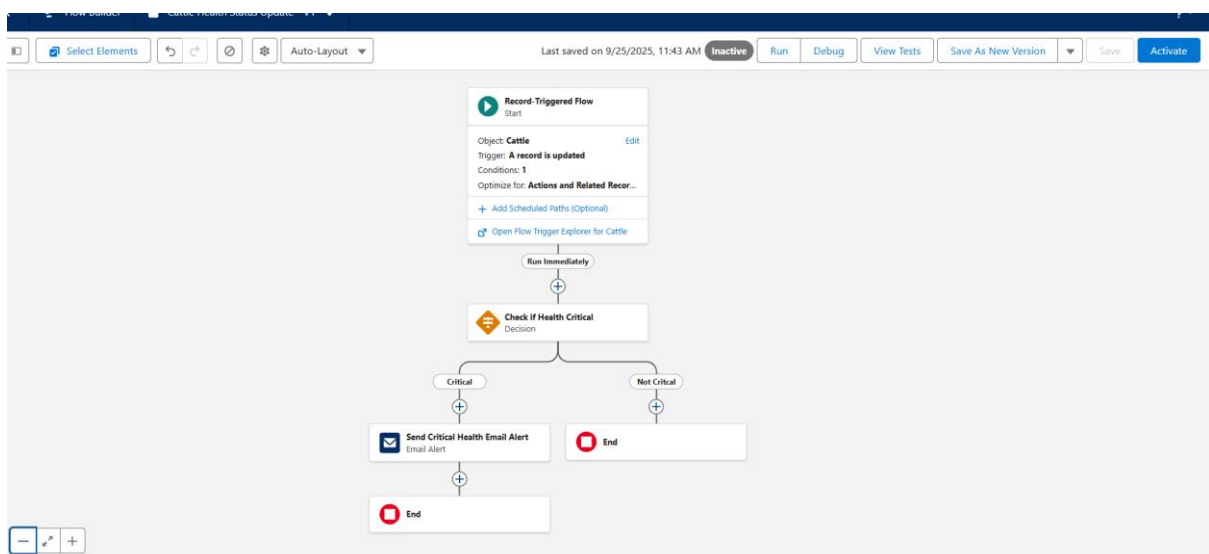
Next

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2. Record-Triggered Flows

Purpose: Automatically trigger on record create/update.

A. Stock Deduction Flow

- **Object:** Order

- **Trigger:** After Order creation.

- **Steps:**

    1. Fetch **related inventory** for the product.

    2. Deduct **ordered quantity** from stock.

    3. If stock < threshold → send **notification to farmer/distributor**.

    4. Update Inventory object.

- **Benefits:** Real-time inventory management, prevents overselling

Email Templates

Email Template: Cattle Critical Health Alert

1. Template Name:
Cattle Critical Health Alert Template

2. Template Type:
Text Email Template (Plain Text)

3. Related Object:
Cattle (Custom Object)

4. Purpose / Use Case:
This email template is used to notify the farmer or responsible personnel when a cattle's health status is updated to Critical. It ensures timely intervention to prevent severe health issues, loss, or productivity reduction.

5. Recipient:

- Farmer (Owner of the cattle)

- Veterinary team (optional, if added as a contact)

6. Email Subject:
Urgent: Critical Health Alert for Your Cattle [Cattle Name/ID]

SETUP
Classic Email Templates

Text Email Template   Help for this Page ❓
Cattle Critical Health Alert Template
Preview your email template below.

Email Template Detail   [Edit] [Delete] [Clone]

Email Templates from Salesforce	Unfiled Public Classic Email Templates		
Email Template Name	Cattle Critical Health Alert Template	Available For Use	✓
Template Unique Name	Cattle_Critical_Health_Alert_Template	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	RAVI SUNNY KUMAR [Change]		
Description			
Created By	RAVI SUNNY KUMAR, 9/24/2025, 10:54 PM	Modified By	RAVI SUNNY KUMAR, 9/24/2025, 11:02 PM

[Edit] [Delete] [Clone]

Email Template   [Send Test and Verify Merge Fields]

Subject | Urgent: Cattle {!Cattle__c.Name} Requires Immediate Attention

Plain Text Preview

Dear {!Cattle__c.Farmer__r.Name},

The health status of your cattle {!Cattle__c.Name} has been updated to CRITICAL. Immediate veterinary attention is required.

Regards,
Dairy Management System

Email Template: Order Confirmation

1. Template Name:
Order Confirmation Email Template

2. Template Type:
Text Email Template (Plain Text)

3. Related Object:
Order (Custom Object)

4. Purpose / Use Case:
This template is used to confirm the placement of a new order. It notifies the customer or distributor that their order has been successfully received and provides essential order details.

5. Recipient:

- Customer / Distributor who placed the order

6. Email Subject:
Order Confirmation - Order #{!Order__c.Order_Number__c}

Field Updates

1. Purpose / Use Case:

Field Updates automate the modification of certain fields in records based on specific criteria or triggers. In this project, they help maintain data accuracy, automate calculations, and ensure proper status tracking without manual intervention.

- Approve Large Order
- Changes the case priority to high..
- Mark Offer Notified
- Mark Stock as Low
- Validate Milk Quantity

Edit Field Update
Mark Offer Notified

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that t
Fields are shown only for the type that you select.

Field Update Edit   Save   Save & New   Cancel

Identification

Name	Mark Offer Notified
Unique Name	Mark_Offer_Notified
Description	
Object	Festival Offer
Field to Update	Notified
Field Data Type	Checkbox
Re-evaluate Workflow Rules after Field Change	☐

Specify New Field Value

Checkbox Options

◉ True
○ False