

Salesforce Project Phase-4 :- Process Automation (Admin)

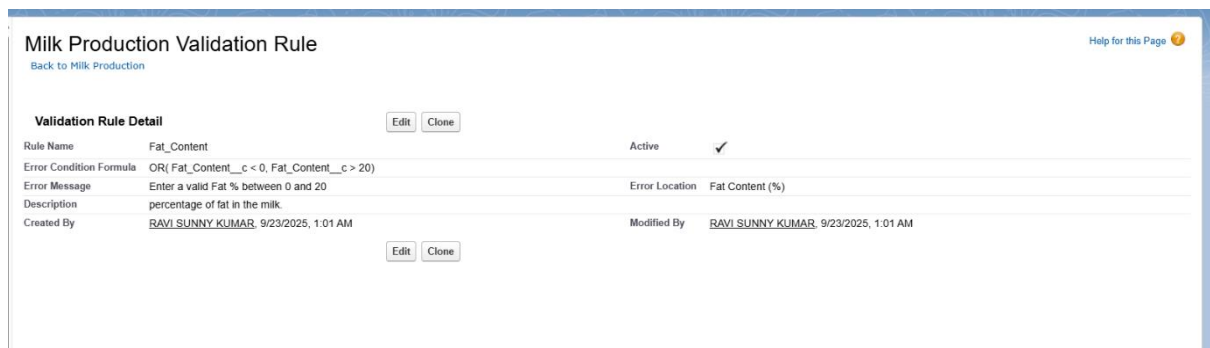
Title :- Dairy Management System Private Limited Using Salesforce CRM

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."



The screenshot shows the 'Milk Production Validation Rule' configuration page in Salesforce. The page includes a 'Validation Rule Detail' section with the following information:

Validation Rule Detail	
Rule Name	Fat_Content
Error Condition Formula	OR(Fat_Content__c < 0, Fat_Content__c > 20)
Error Message	Enter a valid Fat % between 0 and 20
Description	percentage of fat in the milk.
Created By	RAVI SUNNY KUMAR 9/23/2025, 1:01 AM
Modified By	RAVI SUNNY KUMAR 9/23/2025, 1:01 AM

Buttons for 'Edit' and 'Clone' are visible next to the rule name and at the bottom of the configuration table.

- 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."

The screenshot shows the 'Cattle Validation Rule' configuration page. At the top, there's a title 'Cattle Validation Rule' with a 'Back to Cattle' link and a 'Help for this Page' icon. Below the title is a 'Validation Rule Detail' section with 'Edit' and 'Clone' buttons. The details include: Rule Name: Date_of_Birth, Active: checked, 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, and Modified By: RAVI SUNNY KUMAR, 9/23/2025, 1:07 AM. There are 'Edit' and 'Clone' buttons at the bottom of the details section.

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."

Validation Rules					New
1 Items, Sorted by Rule Name					
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Order_Quantity	Quantity	Order quantity must be greater than 0."	✓	RAVI SUNNY KUMAR, 9/23/2025, 1:24 AM	▼

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."

SETUP

Object Manager

Inventory Validation Rule

Back to Inventory

Help for this Page

Validation Rule Detail

Edit

Clone

Rule Name

Expiry_Date

Error Condition Formula

Expiry_Date__c < TODAY()

Error Message

Expiry Date must be in the future.

Description

Created By

RAVI SUNNY KUMAR, 9/23/2025, 1:38 AM

Active

✓

Error Location

Expiry Date

Modified By

RAVI SUNNY KUMAR, 9/23/2025, 1:38 AM

Edit

Clone

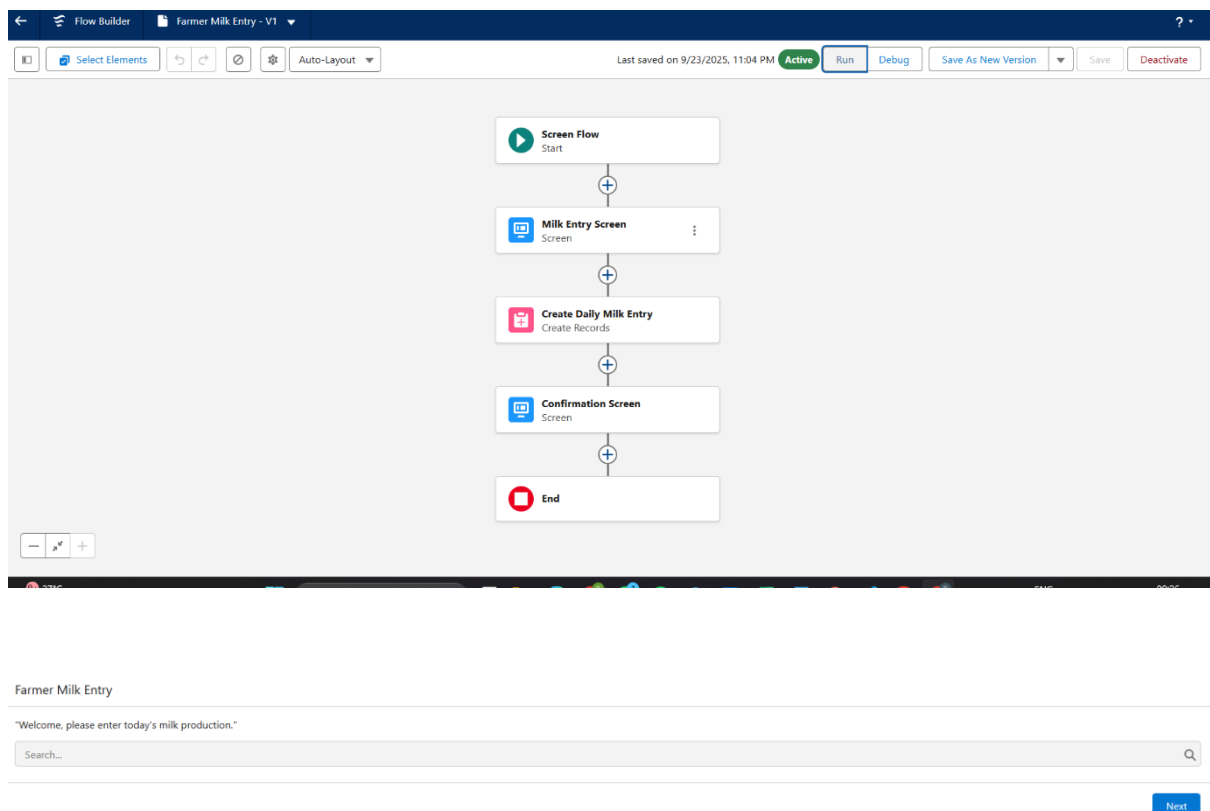
Flows

1. Screen Flows

Purpose: Collect data directly from users through guided screens.

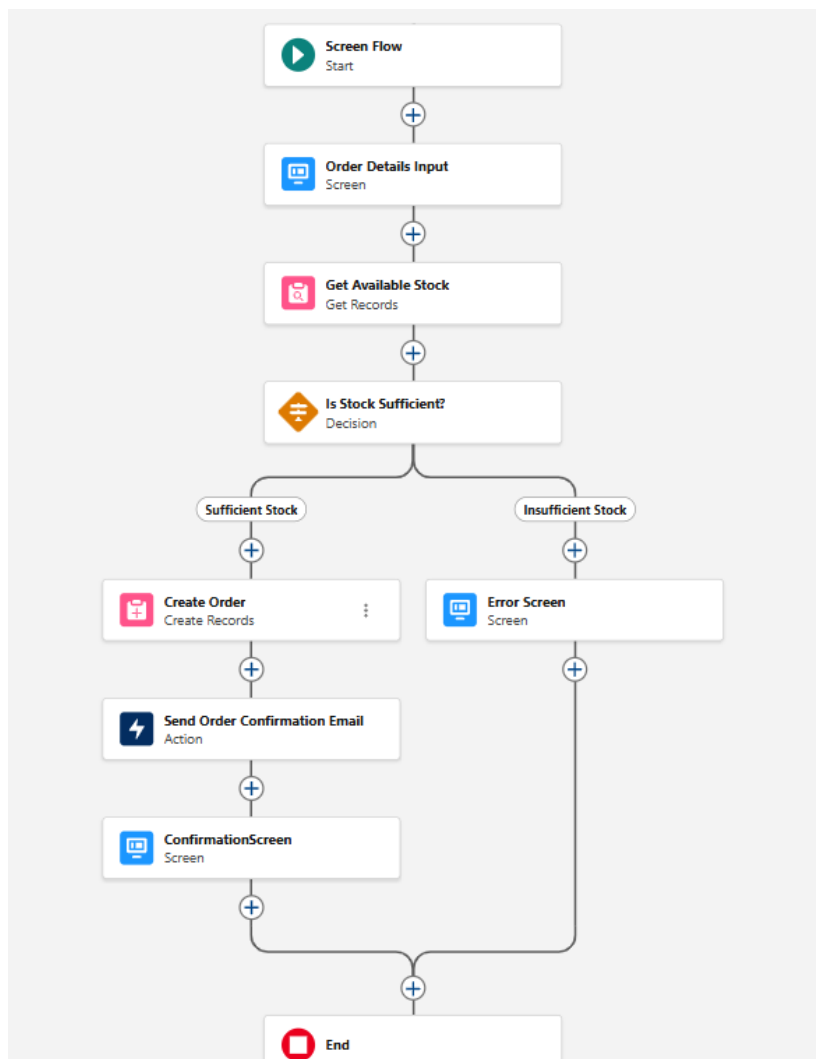
A. Farmer Milk Entry Flow

- **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.



Customer/Distributor Order Creation Flow

Select Customer/Distributor

Search...



* Enter Quantity

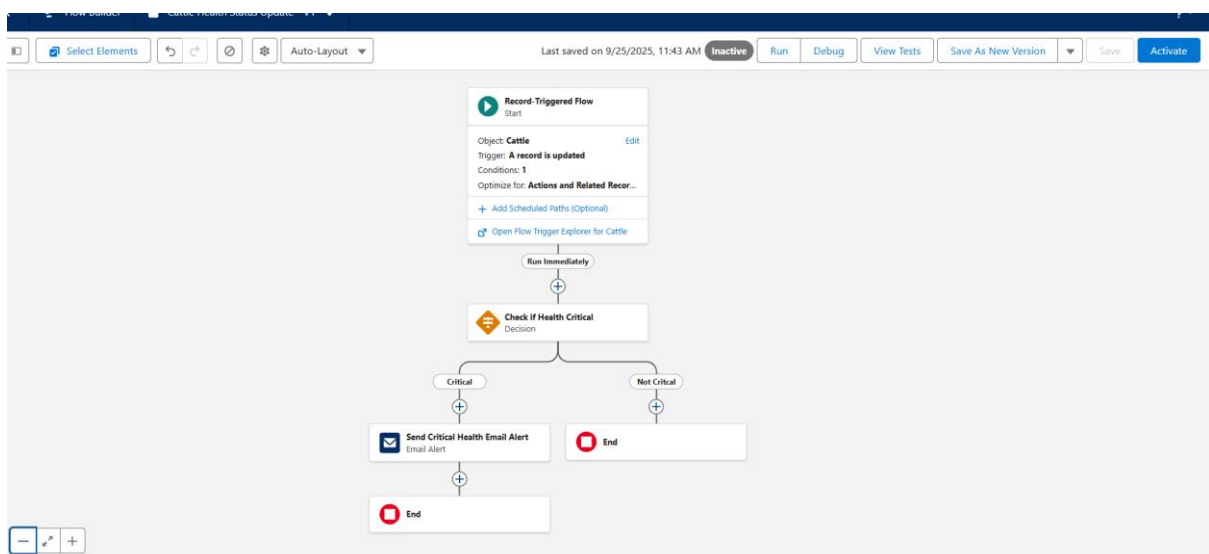
Next

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

Cattle Critical Health Alert Template

Preview your email template below.

Email Template Detail

EditDeleteClone

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	✓
Encoding	Unicode (UTF-8)	Last Used Date
Author	RAVI SUNNY KUMAR [Change]	Times Used
Description		
Created By	RAVI SUNNY KUMAR, 9/24/2025, 10:54 PM	Modified By
		RAVI SUNNY KUMAR, 9/24/2025, 11:02 PM

EditDeleteClone

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}

SETUP

Classic Email Templates

Text Email Template

Order Confirmation Email Template.

Help for this Page

Preview your email template below.

Email Template Detail

EditDeleteClone

Email Templates from Salesforce	Unfiled Public Classic Email Templates	
Email Template Name	Order Confirmation Email Template.	Available For Use
Template Unique Name	Order_Confirmation_Email_Template	Last Used Date
Encoding	Unicode (UTF-8)	Times Used
Author	RAVI SUNNY KUMAR [Change]	
Description		
Created By	RAVI SUNNY KUMAR, 9/23/2025, 11:34 AM	Modified By
		RAVI SUNNY KUMAR, 9/23/2025, 11:37 AM

EditDeleteClone

Email Template

Send Test and Verify Merge Fields

Subject

Order Confirmed: #{!Order__c.Name}. The {!Order__c.Name}

Plain Text Preview

Hello {!Contact.FirstName},
Thank you for your recent order! Your order for {!Order__c.Milk_Quantity__c} liters of milk from cattle {!Order__c.Cattle__rName} has been confirmed.
Order Number: {!Order__c.Name}
Order Date: {!Order__c.CreatedDate}.

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

SETUP

Field Updates

Edit Field Update

Validate Milk Quantity

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 the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit

Save

Save & New

Cancel

Identification

Name

Validate Milk Quantity

Unique Name

Validate_Milk_Quantity

Description

Object

Milk Production

Field to Update

Milk Valid

Field Data Type

Checkbox

Re-evaluate Workflow Rules after Field Change

☐

Specify New Field Value

Checkbox Options

☒ True

☐ False

15:37

23-09-2025

SETUP

Field Updates

All Workflow Field Updates

Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.

View:

All Workflow Field Updates

Edit

Create New View

A

B

C

D

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I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

New Field Update

Action	Name	Field to Update	Operation	Value	Last Modified Date
Edit Del	Approve Large Order	Order: Order Status	Value	Pending Approval	9/23/2025
Edit Del	Changes the case priority to high.	Case: Priority	Value	High	9/15/2025
Edit Del	Mark Offer Notified	Festival Offer: Notified	Value	True	9/23/2025
Edit Del	Mark Stock as Low	Inventory: Quantity Available	Formula		9/23/2025
Edit Del	Validate Milk Quantity	Milk Production: Milk Valid	Value	True	9/23/2025

A

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Other

All

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SETUP

Field Updates

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