

Phase 4 — Process Automation (Admin)

This document summarizes the automation configurations created in Salesforce as shown in the provided screenshots. Each tool enforces rules or automates actions for the **Farmers Market & Supply Chain Project**.

1. Validation Rule (Opportunity)

- **Rule Name:** CloseDate_Not_Past
- **Object:** Opportunity
- **Error Condition Formula:** CloseDate < TODAY()
- **Error Message:** Close Date cannot be in the past.
- **Status:** Active

Purpose: Ensures users cannot set a Close Date earlier than today.

The screenshot shows the 'Opportunity Validation Rule' configuration page. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'Opportunity Validation Rule' and contains a 'Validation Rule Detail' section. The rule details are as follows:

Field	Value
Rule Name	CloseDate_Not_Past
Error Condition Formula	CloseDate < TODAY()
Error Message	Close Date cannot be in the past.
Description	
Created By	Thirishamahi Bandari, 9/24/2025, 7:56 AM
Modified By	Thirishamahi Bandari, 9/24/2025, 7:56 AM

Buttons at the bottom include 'Edit' and 'Clone'. A 'Help for this Page' link is also present.

2. Workflow Rule (Order)

- **Rule Name:** Order_NotifyFarmer
- **Object:** Order
- **Evaluation Criteria:** Evaluate rule when a record is created, and any time it's edited to meet criteria.
- **Rule Criteria:** Order: Status EQUALS Activated
- **Immediate Action:** Email Alert → *Email farmer when order is dispatched*
- **Status:** Inactive (must be activated to run).

Purpose: Sends an email to the farmer when the order status is set to Activated.

The screenshot shows the 'Workflow Rules' page in the Salesforce setup. A specific rule, 'Order_NotifyFarmer', is selected. The rule details are as follows:

Rule Name	Order_NotifyFarmer	Object	Order
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	Order: Status EQUALS Activated		
Created By	Thirishamahi Bandari, 9/24/2025, 9:14 AM		
Modified By	Thirishamahi Bandari, 9/24/2025, 9:14 AM		

Under 'Workflow Actions', there is one immediate action defined:

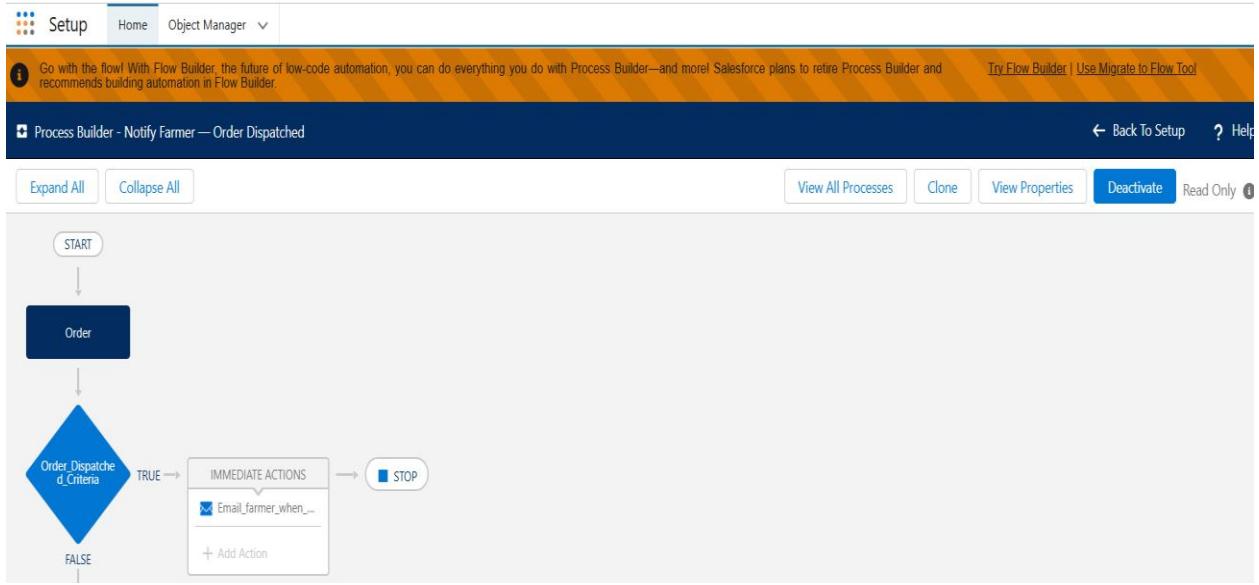
Type	Description
Email Alert	Email farmer when order is dispatched

A note at the bottom states: 'No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.'

3. Process Builder (Order)

- **Process Name:** Notify Farmer — Order Dispatched
- **Object:** Order
- **Criteria Node:** Order_Dispatched_Criteria
 - Condition: Order Status = Dispatched
- **Immediate Action:** Email → *Email farmer when order is dispatched*
- **Status:** Active

Purpose: Automates multi-step logic to notify farmers when orders are dispatched.



4. Flow Builder (Before-Save Flow)

- **Flow Label:** BeforeSave_Order_CalcTotal
- **Object:** Order
- **Trigger:** Record is created or updated
- **Optimization:** Fast Field Updates (Before Save)
- **Elements:**
 - Assignment → Set Total Price
 - $\$Record.Total_Price_c = \$Record.Quantity_c * \$Record.Unit_Price_c$
- **Status:** Active

Purpose: Automatically calculates the Total Price before saving the Order record, ensuring performance and data accuracy.

5. Flow Builder (After-Save Flow)

- **Flow Label:** AfterSave_Order_CreateTask
- **Object:** Order
- **Trigger:** Record is created or updated
- **Optimization:** Actions and Related Records (After Save)
- **Elements:**
 - Create Records → Task
 - Subject: Follow up on new order

- Status: Not Started
- Priority: High
- WhatId = \$Record.Id (links to Order)
- OwnerId = \$Record.OwnerId (assigns task to order owner)
- **Status:** Active 

Purpose: Automatically creates a follow-up Task when a new Order is created or updated.

