

Phase 4: Process Automation (Admin)

1. Validation Rules

- Definition: Ensure data entered into Salesforce meets specific criteria before saving.
- Purpose: Maintain data integrity and enforce business rules.
- Example: Prevent an Order from being marked as “Activated” if Quantity = 0.
- Components:
 - Error Condition Formula → Formula that returns TRUE if error occurs
 - Error Message → Message displayed to the user

2. Workflow Rules

- Definition: Automation that executes actions based on record criteria.
- Trigger: When a record is created or edited.
- Actions:
 - Field Update → Update a field automatically
 - Email Alert → Send email notifications
 - Task Creation → Assign tasks automatically
 - Outbound Message → Send SOAP messages to external systems

Steps to create Workflow:

1. Setup → Workflow Rules → New Rule
2. Select Object → Define Rule Criteria
3. Define Actions → Save → Activate

3. Process Builder

- Definition: Advanced point-and-click automation tool that can handle multiple if-then logic in one process.
- Capabilities:
 - Create/update records
 - Post to Chatter
 - Launch Flows
 - Send emails and notifications

Steps to create Process:

1. Setup → Process Builder → New
2. Define Object → Criteria
3. Add Actions → Save → Activate

4. Approval Process

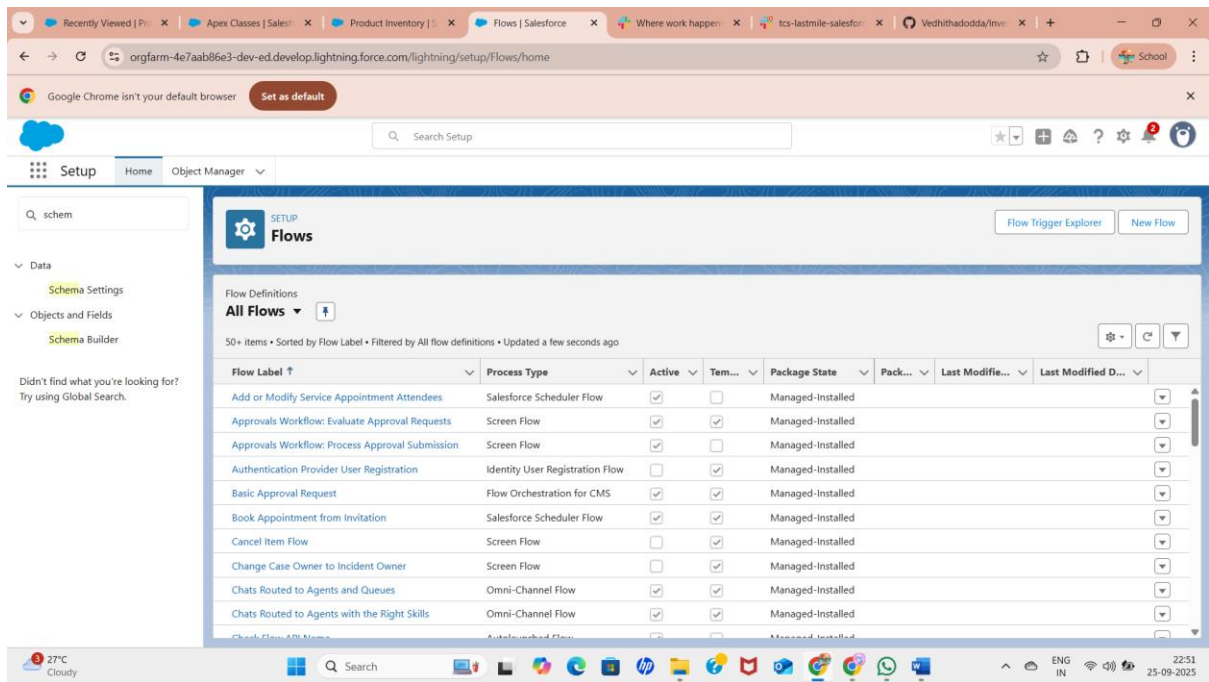
- Definition: Automates record approval by one or more users.
- Steps:
 1. Setup → Approval Processes → New Approval Process
 2. Select Object → Choose Standard or Jump Start Wizard
 3. Define Entry Criteria → Specify Approvers
 4. Set Email Notifications → Actions on Approval/Rejection
 5. Activate the process

5. Flow Builder

- Definition: Salesforce automation tool for building complex processes, including logic, loops, and screens.
- Types of Flows:
 - Screen Flow: Interactive flow with user input
 - Record-Triggered Flow: Triggered automatically when a record is created/updated/deleted
 - Scheduled Flow: Runs at a specific time or interval
 - Auto-Launched Flow: Runs without user interaction, can be triggered by Process Builder or Apex

Common Flow Actions:

- Get Records → Fetch data from Salesforce
- Update Records → Update fields in existing records
- Create Records → Create new records
- Loops & Assignments → Perform logic on multiple records
- Decision → Conditional branching



6. Email Alerts

- Definition: Automated email sent to users, contacts, or related records when a process or workflow condition is met.
- Use Cases:
 - Send order confirmation to a customer
 - Notify manager of approval required

7. Field Updates

- Definition: Automatically update a field on a record when criteria are met.
- Example: Update Order Status to “Activated” when all Order Items are processed.

8. Tasks

- Definition: Automate the creation of tasks for users based on business processes.
- Example: Assign follow-up call tasks after a lead is created.

9. Custom Notifications

- Definition: Salesforce notifications sent to users on desktop or mobile, triggered by processes, flows, or actions.
- Use Cases:
 - Alert a manager when inventory goes below minimum stock

- Notify a sales rep of a new high-priority lead

The screenshot shows the Salesforce Setup interface for Custom Notifications. The browser address bar displays the URL: `orgfarm-4e7aab86e3-dev-ed.develop.lightning.force.com/lightning/setup/CustomNotifications/home`. The page title is "Custom Notifications". A warning message states: "When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service."

Custom Notification Types

Send custom notifications using [Flows](#) or [Process Builder](#)

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	

The left sidebar shows the navigation menu with "Setup" selected. The right sidebar shows the "Custom Notifications" section. The bottom status bar indicates the system time is 22:53 on 25-09-2025.