



»» Validation Rules

- Enforced data quality on Service Request: Created rule Require_Estimated_Cost to prevent saving if Estimated_Cost__c < 0.
- Added rule Mandatory_Location on Service Request to require Location_Address__c when Request_Type__c = "Infrastructure."
- Implemented Future_Deadline_Check on Volunteer Participation preventing Registration_Date__c > Registration_Deadline__c.

[Setup](#) > [Object Manager](#)
Service Request

Details

 Fields & Relationships

 Page Layouts

 Lightning Record Pages

 Buttons, Links, and Actions


Validation Rules

2 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Require_Location_Address	Location Address	Location Address cannot be blank.	✓	Aditya Vishwakarma , 23/09/2025, 1:59 am
Validate_Target_Resolution_Date	Target Resolution Date	Target Resolution Date must be on or after Requested Date.	✓	Aditya Vishwakarma , 23/09/2025, 1:58 am

Workflow Rules

- Workflow Set_Pending_Review on Service Request: When Status__c = “New,” automatically update Status__c to “Active”.
- Workflow Populate_Default_Priority on Service Request: When Priority__c is blank, set Priority__c to “Medium.”
- Workflow Notify_Admin_On_HighCost: If Estimated_Cost__c ≥ 50000, send email alert to City Staff.




SETUP

Workflow Rules

All Workflow Rules

[Help for this Page](#)



Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder.

[Tell Me More](#) | [Migrate your workflow rules to flows](#)

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

Quick Tips

- [Useful Sample Workflow Rule](#)
- [Video Tutorial \(English Only\)](#)
- [Troubleshooting Workflow](#)

View:

All Workflow Rules

Create New View

A
B
C
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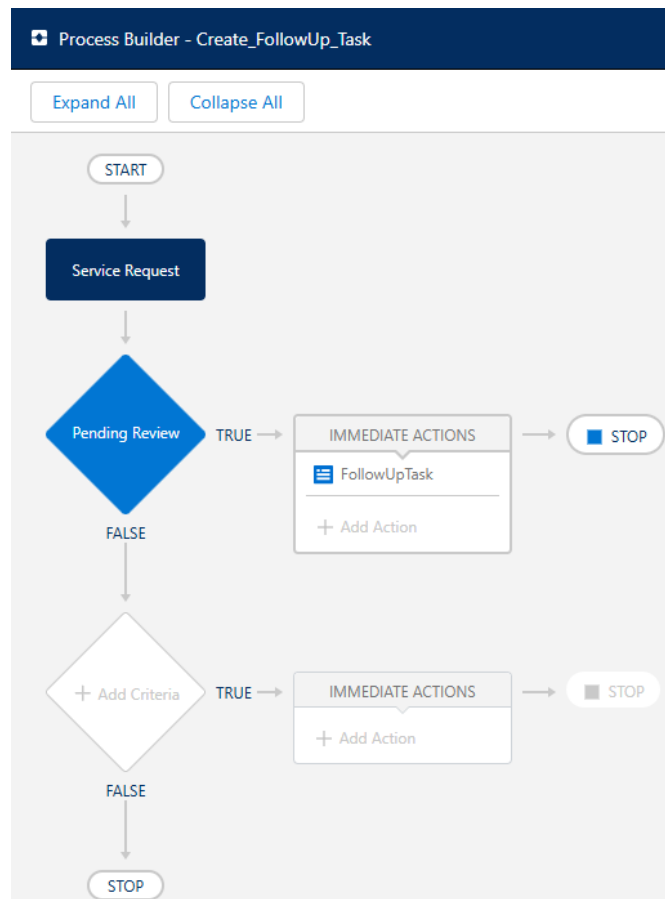
All

New Rule

Action	Rule Name ↑	Description	Object	Active
Edit Del Deactivate	Notify_Assigned_Staff_On_New_Request		Service Request	<input checked="" type="checkbox"/>
Edit Del Deactivate	Notify_Coordinator_7_Days_Before_Event		Volunteer Event	<input checked="" type="checkbox"/>
Edit Del Deactivate	Set_Registered_Status		Volunteer Participation	<input checked="" type="checkbox"/>


»» Process Builder

- Process Create_FollowUp_Task on Service Request: Criteria Status__c = "Pending Review," action to create Task with Subject "Follow up on {Request_Type__c}," Due Date = TODAY()+1, OwnerId = Assigned_Staff__c.
- Process Update_Event_Status on Volunteer Event: If Current_Volunteers__c ≥ Max_Volunteers__c, update Event_Status__c to "Closed."



»» Approval Process

- Approval High_Cost_Request_Approval on Service Request:
 - ✓ Entry Criteria Estimated_Cost__c ≥ 50000
 - ✓ Initial Submitters: Public Group Submitters_CityStaff_Manager
 - ✓ Approval Steps: Step 1 assigned to Manager Role
 - ✓ Initial Submission Action: Field Update Status__c → "Active"
 - ✓ Final Approval Action: Field Update Status__c → "Completed"
 - ✓ Final Rejection Action: Field Update Status__c → "Cancelled"



SETUP

Approval Processes

Approval Processes

Service Request: High_Cost_Request_Approval

[Back to Approval Process List](#)

Help for this Page

Process Definition Detail

Edit

Clone

Deactivate

Process Name	High_Cost_Request_Approval	Active	✓
Unique Name	High_Cost_Request_Approval	Next Automated Approver Determined By	
Description	Route high-cost service requests (>₹50,000) to manager for approval.		
Entry Criteria	Service Request: Estimated Cost GREATER OR EQUAL 50000		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	✓
Approval Assignment Email Template	New_Request_Assigned_Staff		
Initial Submitters	Service Request Owner		
Created By	Aditya Vishwakarma, 23/09/2025, 6:50 pm	Modified By	Aditya Vishwakarma, 23/09/2025, 6:55 pm

Initial Submission Actions


Add Existing

Add New

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Set_Status_Pending_Approval

»» Flow Builder

- Record-Triggered Flow (SetActualCost_and_SendEmail): On Service Request update to Status__c = “Resolved,” copy Estimated_Cost__c to Actual_Cost__c and invoke Email Alert.
- Scheduled Flow (Daily_Overdue_Service_Request_Reminders): Daily at 8 AM, query Service Requests where Status__c = “In Progress” and CreatedDate ≤ Today – 7; create Reminder Task.
- Screen Flow (Volunteer Registration Wizard):
 - ✓ Step 1: Capture Full Name, Email, Phone.
 - ✓ Step 2: Present upcoming Volunteer Event choices.
 - ✓ Step 3: Confirm Consent Date and Terms.
 - ✓ Action: Create Volunteer Participation record.
- Auto-Launched Flow (IncrementVolunteerCount): Invoked by trigger to aggregate Volunteer Participation counts and update Volunteer Event Current_Volunteers__c.



SETUP

Flows

Flow Trigger Explorer

New Flow

Flow Definitions

All Flows

50+ items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

⚙


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Flow Label ↑	Process Type	Active	Tem...	Package State	Pac...	Last Modified By	Last Modified Date
Custom Notification Flow	Autolaunched Flow	✓	☐	Unmanaged		Aditya Vishwakarma	23/09/2025, 10:00 pm
Daily Overdue Service Request Reminders	Autolaunched Flow	✓	☐	Unmanaged		Aditya Vishwakarma	23/09/2025, 7:46 pm
Volunteer Registration Wizard	Screen Flow	✓	☐	Unmanaged		Aditya Vishwakarma	23/09/2025, 9:05 pm
Welcome New Volunteer	Autolaunched Flow	✓	☐	Unmanaged		Aditya Vishwakarma	24/09/2025, 3:49 pm

»» Email Alerts

- Alert Send_ThankYou_Email_Alert on Service Request: Uses template ThankYou_Template, recipient Related User Assigned Staff, triggered by Record-Triggered Flow.
- Alert Confirm_Registration_Email on Volunteer Participation: Uses template Registration_Confirmation, recipient Related User Volunteer, triggered by Flow.

 **SETUP**
Email Alerts

All Email Alerts

Email alerts are used to send emails from a flow or other automation.

View: All Email Alerts [Create New View](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

Action	Description	Email Template Name	Object	Last Modified Date
Edit Del	Confirm volunteer registration email.	New_Request_Assigned_Staff	Volunteer Participation	23/09/2025
Edit Del	Event Reminder to Coordinator	New_Request_Assigned_Staff	Volunteer Event	24/09/2025
Edit Del	Notify staff when a new service request is created and assigned.	New_Request_Assigned_Staff	Service Request	23/09/2025
Edit Del	Notify Submitted Rejected	Event Rejected Notification	Volunteer Event	24/09/2025
Edit Del	Notify Submitter Approval Requested	Event Approval Request Submitted	Volunteer Event	24/09/2025
Edit Del	Notify Submitter Approved	Event Approved Notification	Volunteer Event	24/09/2025

»» Field Updates

- Workflow Field Update Set_Status_Pending_Review on Service Request.
- Approval Process Field Updates for approval and rejection steps.
- Flow “Initial Submission” Action Field Update Set_Status_Pending_Review via Approval Process configuration.

Field Update
Set_Status_Pending_Approval

[Rules Using This Field Update \(0\)](#) | [Approval Processes Using This Field Update \(1\)](#) | [Entitlement Processes Using This Field Update \(0\)](#)

[Help for this Page](#)

Field Update Detail [Edit](#) [Delete](#)

Name	Set_Status_Pending_Approval
Unique Name	Set_Status_Pending_Approval
Description	
Object	Service Request
Field to Update	Service Request: Status
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>
New Field Value	Pending Review

[Edit](#) [Delete](#)

Rules Using This Field Update [Rules Using This Field Update Help](#)

This field update is currently not used by any rules.

Approval Processes Using This Field Update [Approval Processes Using This Field Update Help](#)

Action	Approval Process Name	Description	Type	State
Edit Del	High_Cost_Request_Approval	Route high-cost service requests (>₹50,000) to manager for approval.	Service Request	Active

»» Tasks

- Workflow-created Tasks for follow-up on Service Requests via Process Builder.
- Scheduled Flow-created Tasks for overdue Service Requests with fields: Subject “Follow up on overdue Service Request,” Due Date = Flow.CurrentDate, OwnerId = Assigned_Staff__c.

Record Type*

Task

Set Field Values

Field *	Type *	Value *
Due Date Only	Formula	Today() + 1
Status	Picklist	Not Started
Subject	Formula	[Service_Request__c].Requ...
Related To ID	Field Reference	[Service_Request__c].Ow...
Name ID	Field Reference	[Service_Request__c].Ow...

»» Custom Notifications

- Custom Notification Type VolunteerParticipationAlert created under Notification Builder.
- Record-Triggered Flow Notify_Managers_InProgress uses Send Custom Notification action:
 - ✓ Notification Type ID → Type VolunteerParticipationAlert
 - ✓ Title “Volunteer Participation In Progress”
 - ✓ Body “Request {Attendance_Status__c} from the Volunteer.”
 - ✓ Recipient IDs → Collection of Volunteer IDs

Custom Notifications

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 New

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

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	▼
Volunteer Participation Alert	Volunteer_Participation_Alert		✓	✓ ▼