🖥️ Phase 4: Process Automation

⟫ 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	**Validation Rules** 2 Items, Sorted by Rule Name		New
Fields & Relationships			
Page Layouts	**RULE NAME**	**ERROR LOCATION**	**ERROR MESSAGE**	**ACTIVE**	**MODIFIED BY**
Lightning Record Pages	Require_Location_Address	Location Address	Location Address cannot be blank.	✓	Aditya Vishwakarma, 23/09/2025, 1:59 am	▾
Buttons, Links, and Actions	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 ❓

ℹ️ 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:

Quick Tips
- Useful Sample Workflow Rule
- Video Tutorial (English Only)
- Troubleshooting Workflow

- 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.

View: [All Workflow Rules ▾] 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**

New Rule

Action	Rule Name ↑	Description	Object	Active
Edit	Del	Deactivate	Notify_Assigned_Staff_On_New_Request		Service Request	✓
Edit	Del	Deactivate	Notify_Coordinator_7_Days_Before_Event		Volunteer Event	✓
Edit	Del	Deactivate	Set_Registered_Status		Volunteer Participation	✓

» 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."
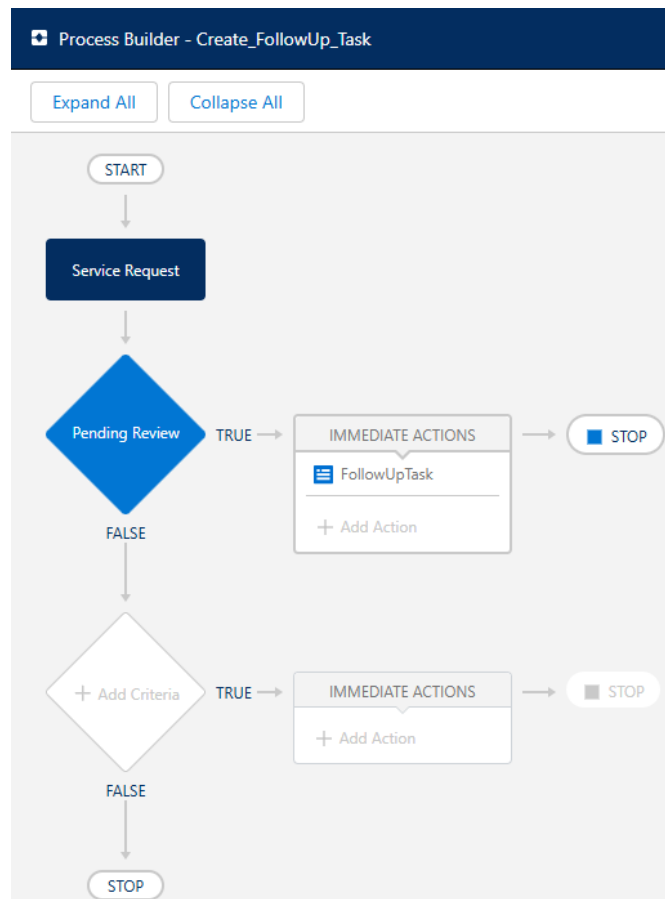
» Approval Process

➢ 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"

Approval Processes
Service Request: High_Cost_Request_Approval

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 ℹ️   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.

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

⚙️ ▼   C   ▼

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.

⋙ 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.

⫸ 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.

⫸ 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