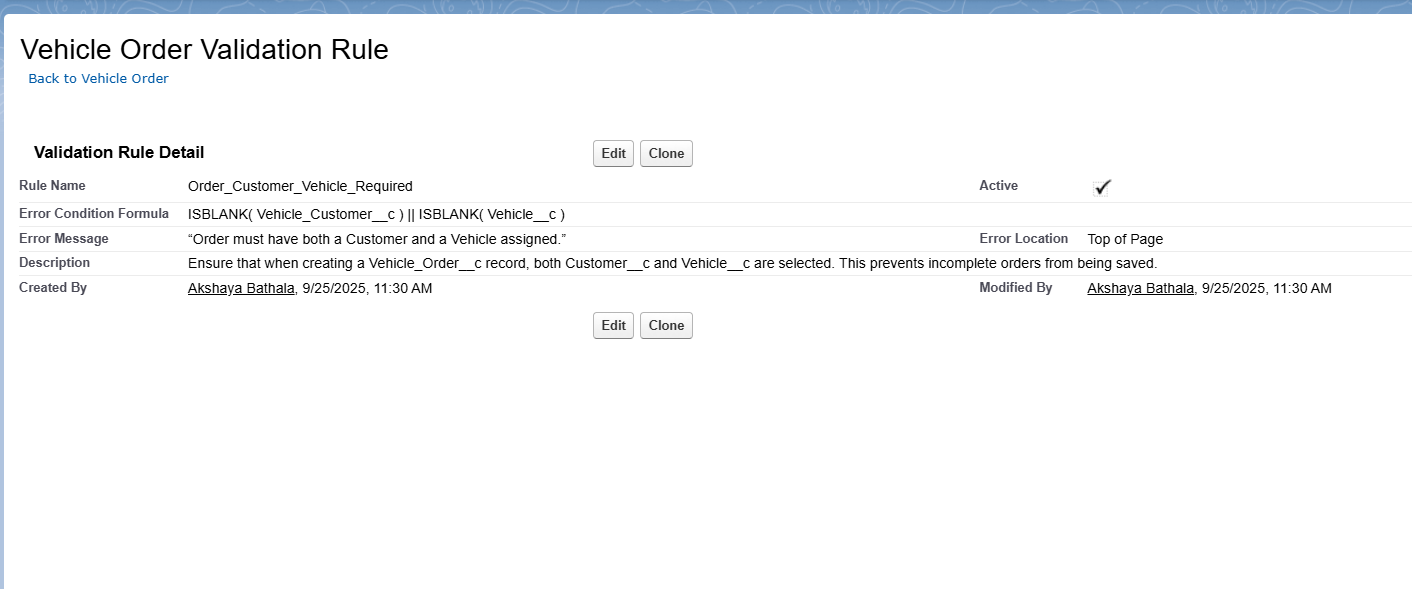
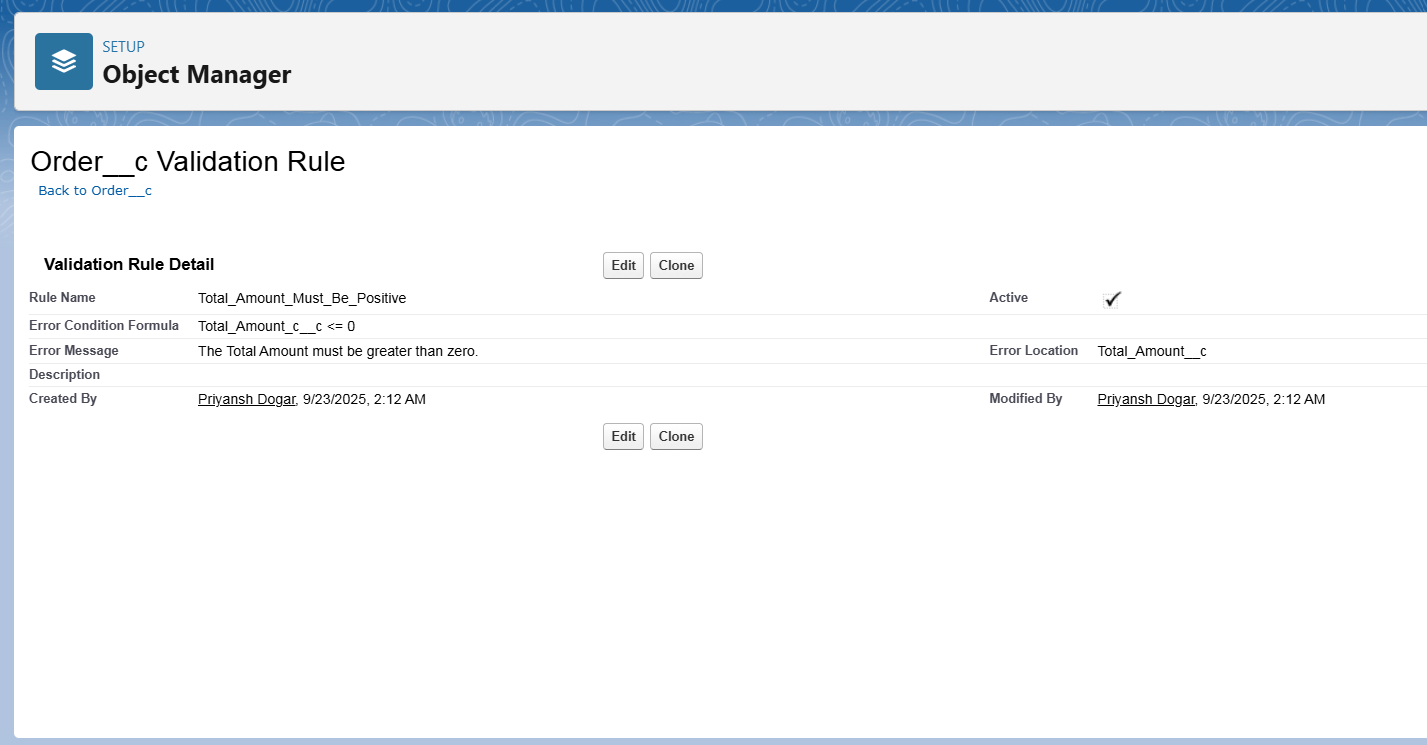
**PHASE 4 - Process Automation (Admin)**

The goal of this phase is to use Salesforce's declarative tools to automate the core business logic, enforce data quality, and handle notifications.

**♦️ Validation Rules**

**Validation Rule:** Order\_Customer\_Vehicle\_Required  
**Object:** Vehicle\_Order\_\_c  
**Purpose:** Ensure both Customer and Vehicle are selected  
**Formula:** ISBLANK( Vehicle\_Customer\_\_c ) || ISBLANK( Vehicle\_\_c )  
**Error Message:** “Order must have both a Customer and a Vehicle assigned.”  
**Field:** Customer\_\_c / Vehicle\_\_c  
**Steps:** Object Manager → Vehicle\_Order\_\_c → Validation Rules → New → Enter formula → Error Message → Field → Save





**♦️ Flow Builder (Record-Triggered Flow)**

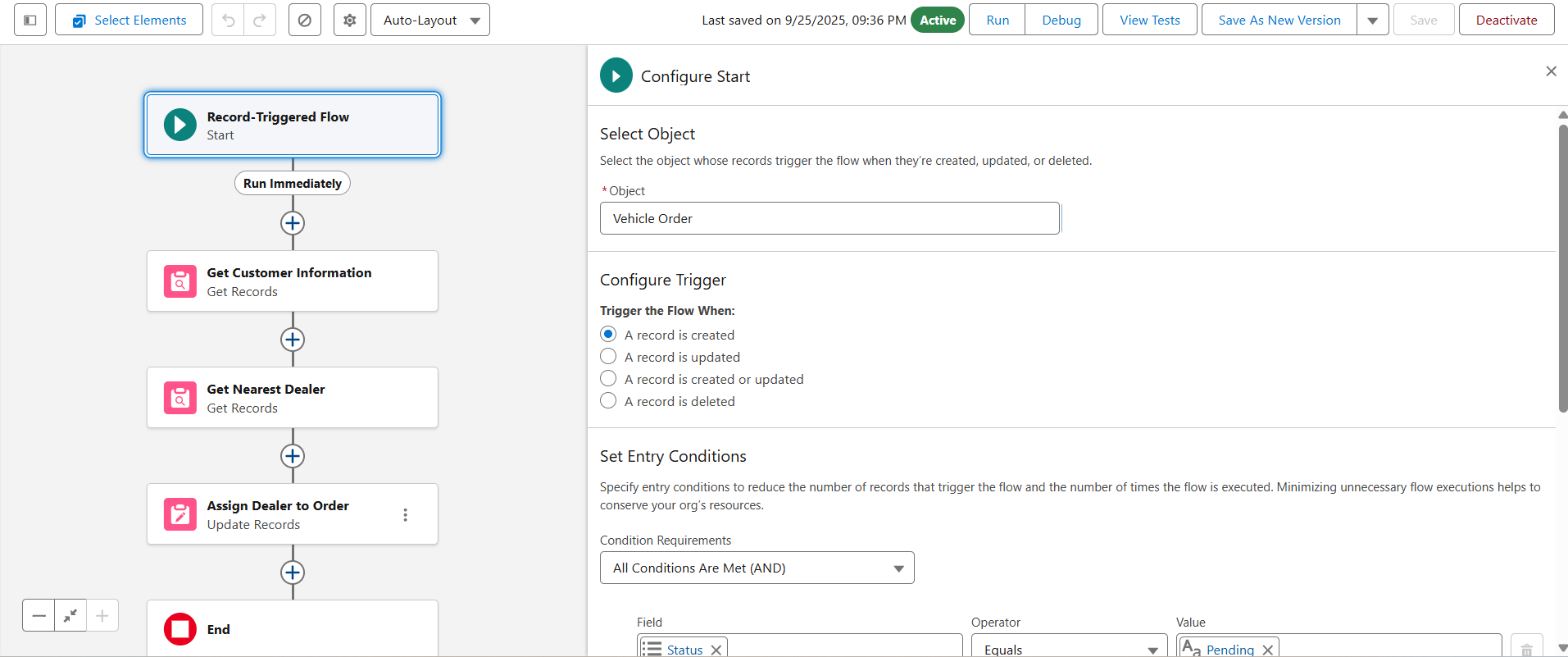
**Objective**

Automatically assign the nearest dealer to a new **Vehicle\_Order\_\_c** record based on the customer’s address.

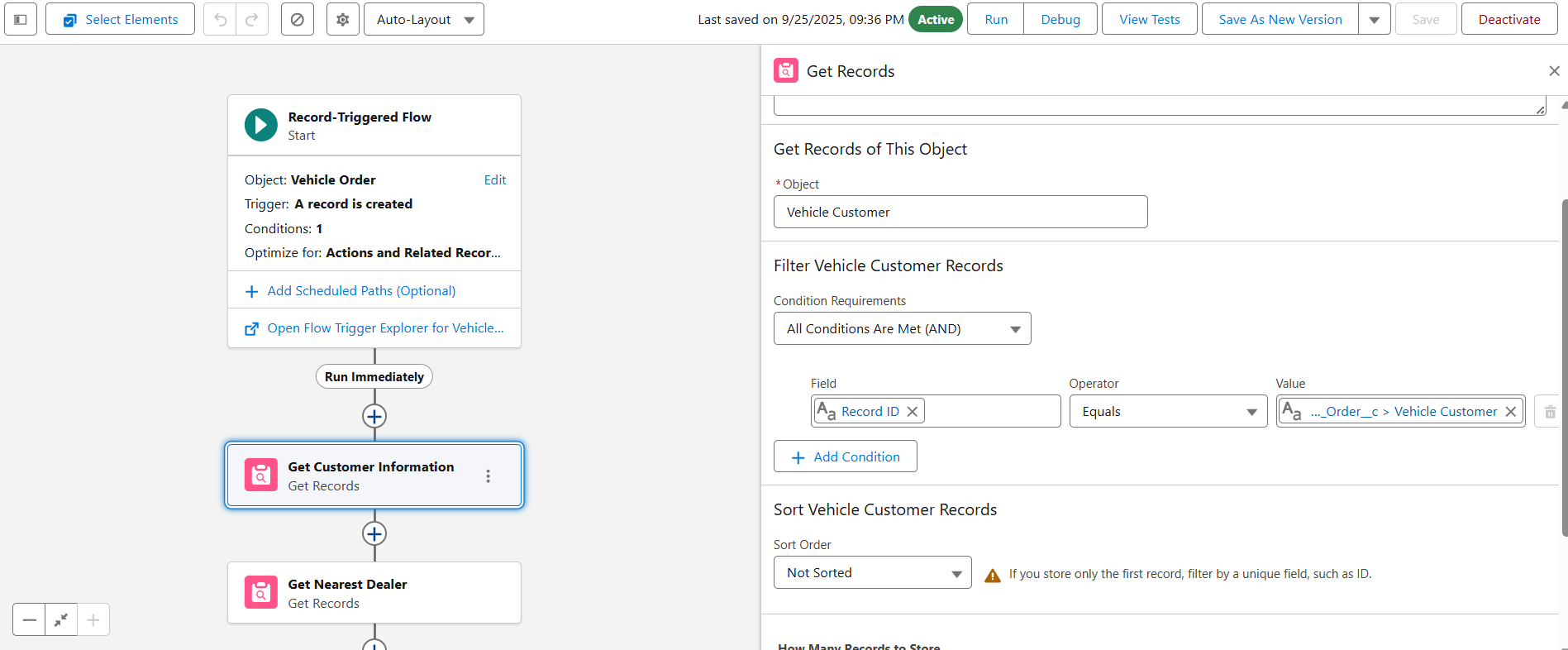
**Flow Type and Trigger Configuration**

* **Flow Type:** Record-Triggered Flow
* **Object:** Vehicle\_Order\_\_c
* **Trigger:** When a record is **created**
* **Run Flow:** **After the record is saved** (to allow related record lookup and update)

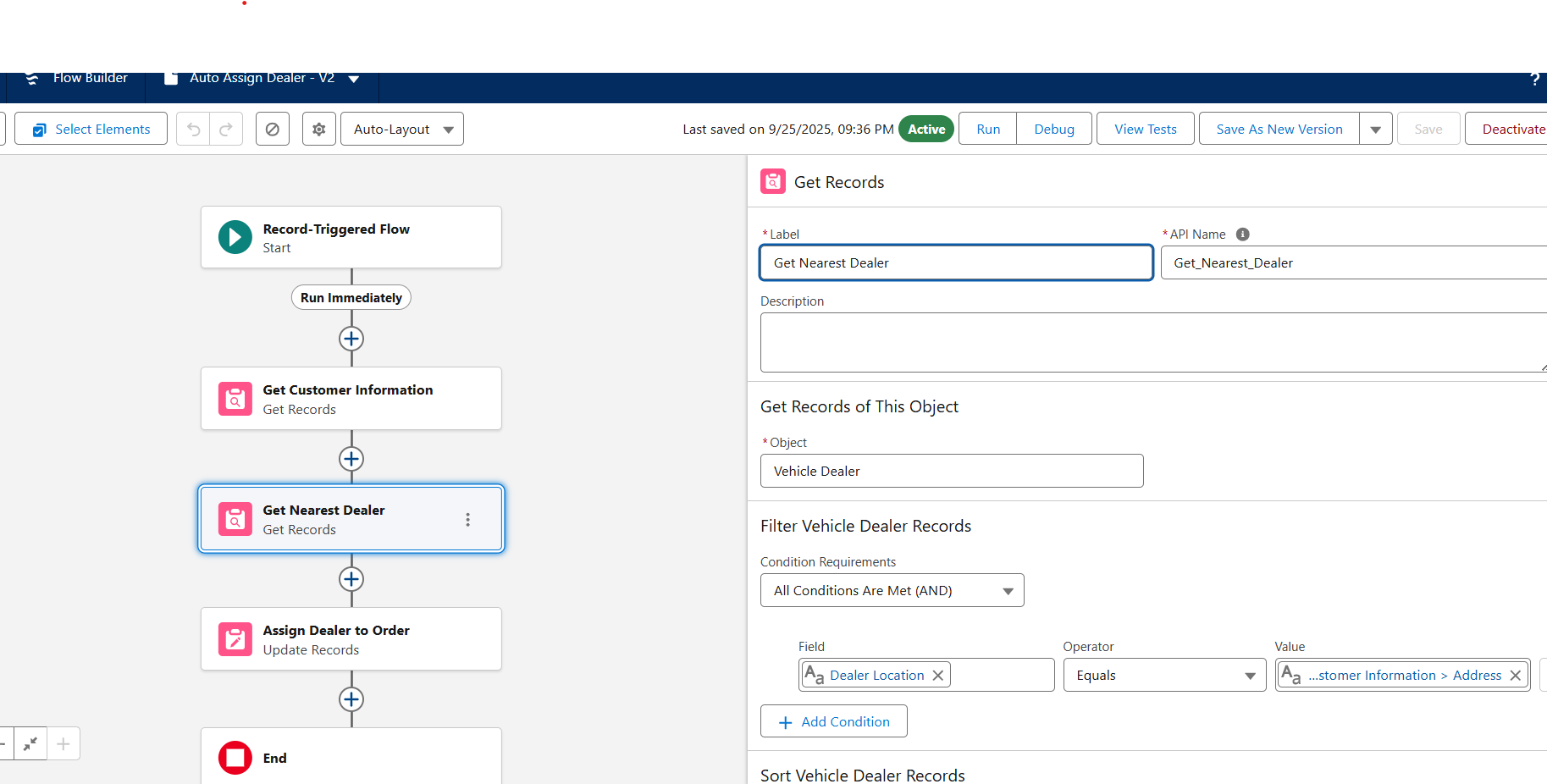
**Flow Logic / Steps**

****

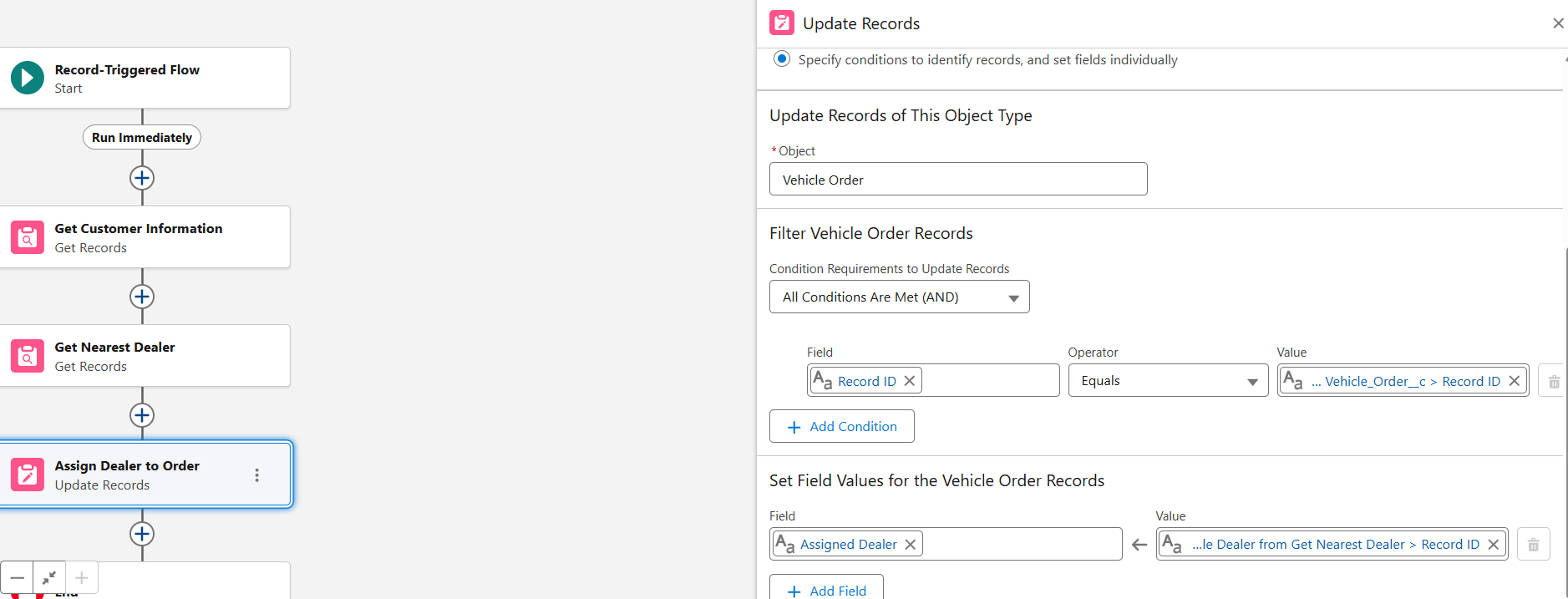
1. **Get Customer Information**
   * **Element:** Get Records
   * **Object:** Vehicle\_Customer\_\_c
   * Get the customer record whose **Id matches the Customer\_\_c field on the triggering Vehicle\_Order\_\_c**.
   * **Output:** Store customer address for further use



1. **Get Nearest Dealer**
   * **Element:** Get Records
   * **Object:** Vehicle\_Dealer\_\_c
   * Get the dealer whose **Dealer\_Location\_\_c matches the Address field of the customer linked to this Vehicle\_Order\_\_c**.
   * **Sort:** Optionally by distance or priority if available
   * **Output:** Store the nearest dealer record



1. **Assign Dealer to Order**
   * **Element:** Update Records
   * **Record to Update:** Triggering Vehicle\_Order\_\_c record
   * Update the triggering **Vehicle\_Order\_\_c** record by setting **Dealer\_\_c = Id of the nearest dealer**



**♦️ Approval Process**

An approval process automates how records are approved. **While not part of the initial build, a potential future use case has been identified**:

* **Objective:** Require a Dealer Manager’s approval for any Vehicle\_Order\_\_c with a Total\_Amount\_\_c exceeding a set value (e.g., 50,000 INR).
* **Process:** When an order meets the criteria, it is automatically submitted to the Dealer Manager for approval or rejection, and the order’s Status\_\_c is updated accordingly.

**♦️ Workflow Rules & Process Builder**

These are legacy automation tools in Salesforce. For this project, all new automation, including the loyalty points calculation, was built using **Flow Builder** to align with current Salesforce best practices.