

Phase 4: Process Automation (Admin)

1. Validation Rules

Definition: Validation rules ensure that data entered into Salesforce meets specific criteria before a record is saved.

Purpose: To maintain data integrity and enforce business rules.

Example: Prevent an Order from being marked as “Activated” if the Quantity is zero.

Components of Validation Rules

- Error Condition Formula – A formula that evaluates to TRUE when an error occurs.
- Error Message – A message displayed to the user explaining the error.

2. Workflow Rules

Definition: Workflow rules automate actions based on record criteria.

Trigger: When a record is created or edited.

Workflow Actions

- Field Updates – Automatically update field values.
- Email Alerts – Send automated email notifications.
- Task Creation – Create tasks automatically.
- Outbound Messages – Send SOAP messages to external systems.

Steps to Create a Workflow Rule

1. Navigate to Setup → Workflow Rules → New Rule.
2. Select the object and define rule criteria.
3. Define actions, save, and activate the rule.

3. Process Builder

Definition: A point-and-click automation tool used to handle complex if–then logic in a single process.

Capabilities

- Create or update records.
- Post updates to Chatter.
- Launch Flows.
- Send emails and notifications.

Steps to Create a Process

1. Setup → Process Builder → New.
2. Define the object and criteria.
3. Add actions, save, and activate.

4. Approval Process

Definition: Automates the approval of records by one or more users.

Steps

1. Setup → Approval Processes → New Approval Process.
2. Select the object and choose a wizard.
3. Define entry criteria and approvers.
4. Configure email notifications and actions for approval or rejection.
5. Activate the approval process.

5. Flow Builder

Definition: Salesforce's automation tool for building complex logic-driven processes.

Types of Flows

- Screen Flow – Requires user interaction.
- Record-Triggered Flow – Runs automatically when a record is created, updated, or deleted.
- Scheduled Flow – Runs at a scheduled time or interval.
- Auto-Launched Flow – Runs without user interaction.

Common Flow Actions

- Get Records – Retrieve data from Salesforce.

- Create Records – Create new records.
- Update Records – Modify existing records.
- Loops and Assignments – Apply logic to multiple records.
- Decisions – Implement conditional branching.

6. Email Alerts

Definition: Automated emails sent when workflow or process conditions are met.

Use Cases:

- Send order confirmation emails to customers.
- Notify managers when approvals are required.

7. Field Updates

Definition: Automatically update field values when specific criteria are met.

Example: Update Order Status to “Activated” once all Order Items are processed.

8. Tasks

Definition: Automatically create 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 automation tools.

Use Cases:

- Alert managers when inventory falls below minimum stock levels.
- Notify sales representatives of new high-priority leads.