

## **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.