**Phase 4 Procedure – Process Automation (Admin)**

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1. Validation Rule – Validate Rental Dates

Purpose: Prevent invalid rental agreements where the End Date is earlier than the Start Date.

Steps:

1. Go to **Setup → Object Manager → Rental Agreement → Validation Rules → New**.

2. Enter:

    o **Rule Name:** Validate_Rental_Dates

    o **Description:** Prevent End Date from being before Start Date

3. **Error Condition Formula:**

4. End_Date__c < Start_Date__c

5. **Error Message:** "End Date cannot be before Start Date."

6. Choose where to display the error (field or top of page).

7. Click **Save → Activate**.

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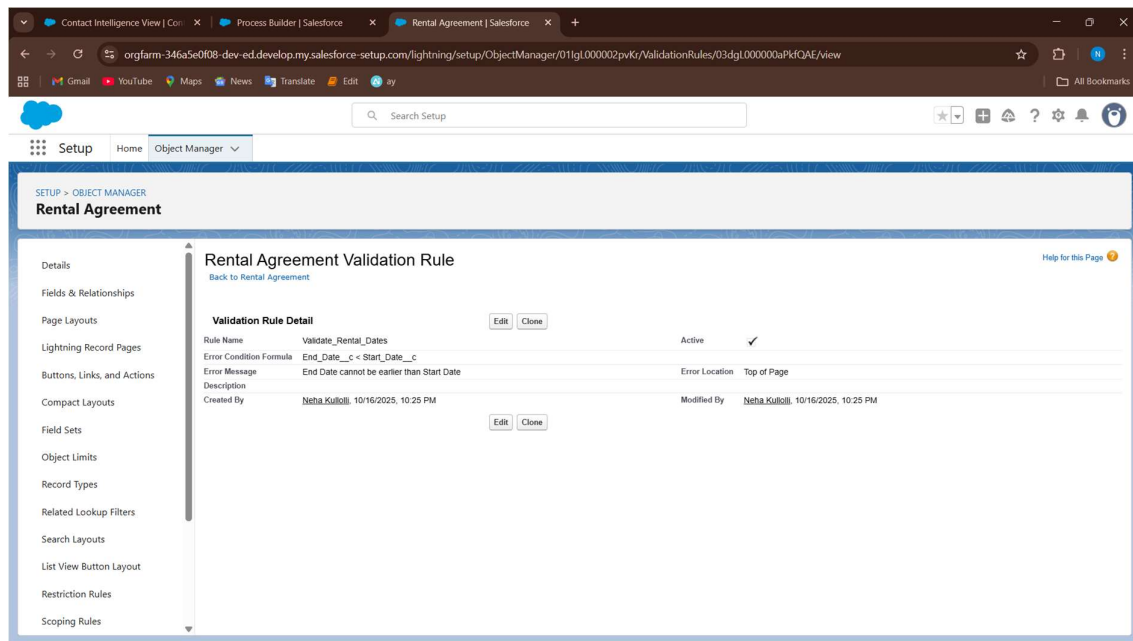
2. Approval Process – Rental_Approval_Process

Purpose: Create a structured review and approval mechanism for rental agreements.

Procedure: Approval Process – Discount_Approval_Store_Owner

Object: Rental Agreement
Process Name: Discount_Approval_Store_Owner

Step 1: Create the Approval Process

1. **Go to Setup → Approval Processes → Rental Agreement → New Approval Process → Use Standard Wizard**

2. **Enter:**

   o **Name: Discount_Approval_Store_Owner**

   o **Unique Name: auto-filled (Discount_Approval_Store_Owner)**

   o **Description: Handles approval for rental agreements with discounts > 20%**

Step 2: Define Entry Criteria

- **Criteria:**

- **Discount__c > 20 AND Approval_Status__c = 'Draft'**

- **This ensures only records meeting these conditions enter the approval process.**

Step 3: Set Record Editability

- **Record editability: Administrator ONLY**

- **Allow submitters to recall approval requests: Checked**

Step 4: Define Initial Submitters

- **Users allowed to submit for approval:**

   o **Neha Kullolli**

   o **Naveen K**

   o **Rental Agreement Owner**

Step 5: Initial Submission Actions

- **Lock the Record → Prevent editing while in approval process**

- **Field Update: Set Approval_Status__c = Pending Approval**

Step 6: Define Approval Steps

Step 1 – Store Owner Approval

- **Step Name: Store_Owner_Approval**

- **Criteria: All records that meet entry criteria**

- **Assigned Approver: Neha Kullolli**

- **Reject Behavior: Final Rejection**

Step 7: Final Approval Actions

- **Lock Record → Prevent further editing**

- **Field Update: Set Approval_Status__c = Approved**

- **Email Alert: Send approval email to submitter**

Step 8: Final Rejection Actions

- **Unlock Record → Allow editing after rejection**

- **Field Update: Set Approval_Status__c = Rejected**

- **Email Alert: Send rejection email to submitter**

Step 9: Recall Actions

- **Unlock Record → When submitter recalls the request**

- **Field Update: Reset Approval_Status__c = Draft**

Step 10: Activate Process

1. **Click Activate to make the process live.**

2. **Test by submitting a rental agreement with discount > 20% to ensure the approval process works correctly**

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SETUP
Approval Processes

Approval Processes
Rental Agreement: Discount_Approval_Store_Owner

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Process Definition Detail   Edit ▾   Clone   Deactivate

Process Name	Discount_Approval_Store_Owner	Active	✓
Unique Name	Discount_Approval_Store_Owner	Next Automated Approver Determined By	
Description			
Entry Criteria	(Rental Agreement: Discount GREATER THAN 20) AND (Rental Agreement: Approval Status EQUALS Draft)		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	✓
Approval Assignment Email Template	Discount Approval Request		
Initial Submitters	User: Neha Kullolli, User: Naveen K, Rental Agreement Owner		
Created By	Neha Kullolli, 10/15/2025, 10:10 PM	Modified By	Neha Kullolli, 10/15/2025, 11:36 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_to_Pending_Approval

Approval Steps ⓘ

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions	Edit	1	Store_Owner_Approval	Store_Owner_Approval		User:Neha Kullolli	Final Rejection

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Gmail

in:spam

Compose

Inbox   711
Starred
Snoozed
Sent
Drafts
Purchases   3
Less
Important
Scheduled
All Mail
Spam   6
Trash
Manage subscriptions
Manage labels
Create new label

Labels

Upgrade

Delete forever   Not spam   1 of 10

Approval Needed: Rental Agreement with % Discount

Neha Kullolli via 922uwve1fuw5gn.gl-c0boOuan.can98.bnc.salesforce.com   Oct 16, 2025, 12:01 PM (23 hours ago)
to me

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report not spam

Hello Neha,
A new rental agreement requires your approval for a discount exceeding 20%.
Rental Agreement Details:
- Customer: Arjun Mehta
- Instrument:
- Discount: %
- Total Amount: INR 3,375.00
Please review and approve/reject this request.
Click here to review: https://orgfarm-346a5e0f08-dev-ed.develop.my.salesforce.com/a05gL000009Sq4v
Thank you!

↩ Reply   → Forward

orgfarm-346a5e0f08-dev-ed.develop.lightning.force.com/lightning/r/Rental_Agreement__c/a05gL000009Sq4vQAC/view

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Sports Rental Mana... Contacts ⌄ Rental Plans ⌄ Equipments ⌄ Rental Agreements ⌄ Maintenances ⌄ Payments ⌄ Reports ⌄ Dashboards ⌄

Rental Agreement
Arjun Aggrement

New Contact   New Opportunity   New Lead ⌄

Related   **Details**

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

⌄ **Rental Information**

Customer	Rental Plan
Arjun Mehta	Special Discount
Equipment	Status
Cricket Bat	Active
Start Date	End Date
10/15/2025	11/14/2025
Rental Agreement Name	Rental Code
Arjun Aggrement	RENT-0004
Approval Status	
Approved	

⌄ **Upcoming & Overdue**

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

⌄ **Pricing Details**

Base Rate	Discount
INR 150.00	25.00%
Total Amount	
INR 3,375.00	
Created By	Last Modified By
Neha Kullolli, 10/15/2025, 11:20 PM	Neha Kullolli, 10/15/2025, 11:38 PM