

## Phase 4: Process Automation (Admin)

**Project:** Groundnut Foods Pvt. Ltd. – Salesforce Implementation

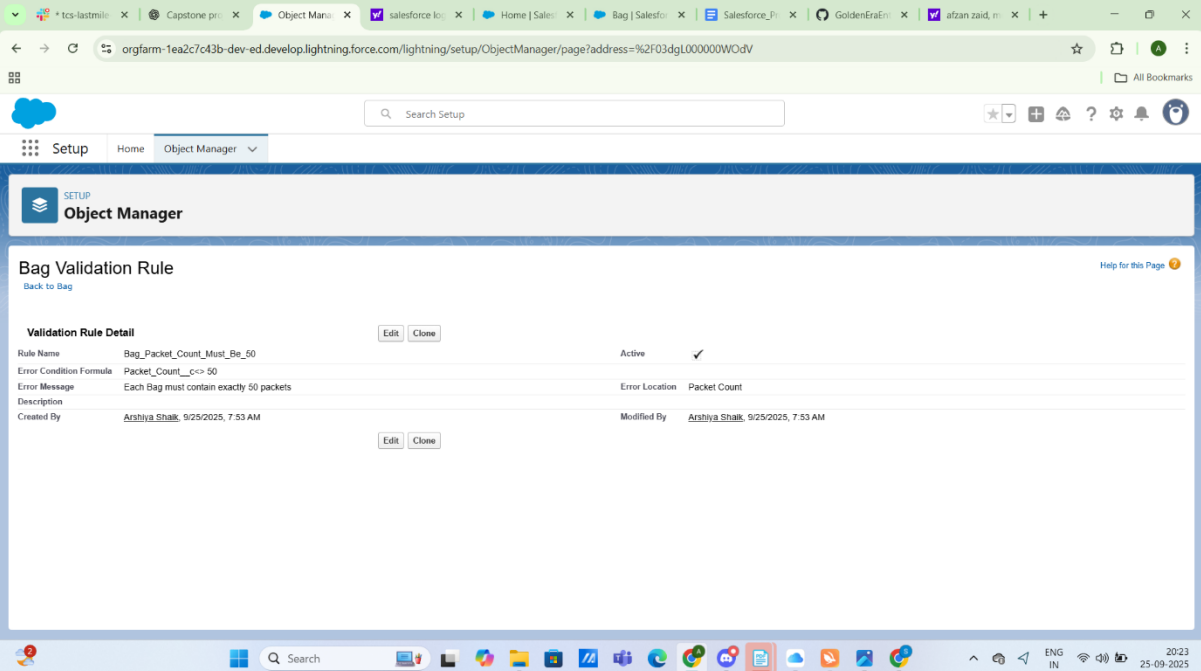
**Phase:** 4 – Process Automation (Admin)

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### 1. Validation Rules

**Use Case:** Prevent creating a Sales Order without a Customer.

- **Object:** Bag\_\_c
- **Rule Name:** Bag\_Packet\_count\_must\_be\_50
- **Error Condition Formula:**
- Packet\_count<>50
- **Error Message:** Each bag must contain exactly 50 packets



The screenshot displays the Salesforce Object Manager interface for a 'Bag' object. The 'Validation Rule Detail' section shows the following configuration:

Field	Value
Rule Name	Bag_Packet_Count_Must_Be_50
Error Condition Formula	Packet_Count__c <> 50
Error Message	Each Bag must contain exactly 50 packets
Error Location	Packet Count
Description	
Created By	Arshiya Shaik
Modified By	Arshiya Shaik

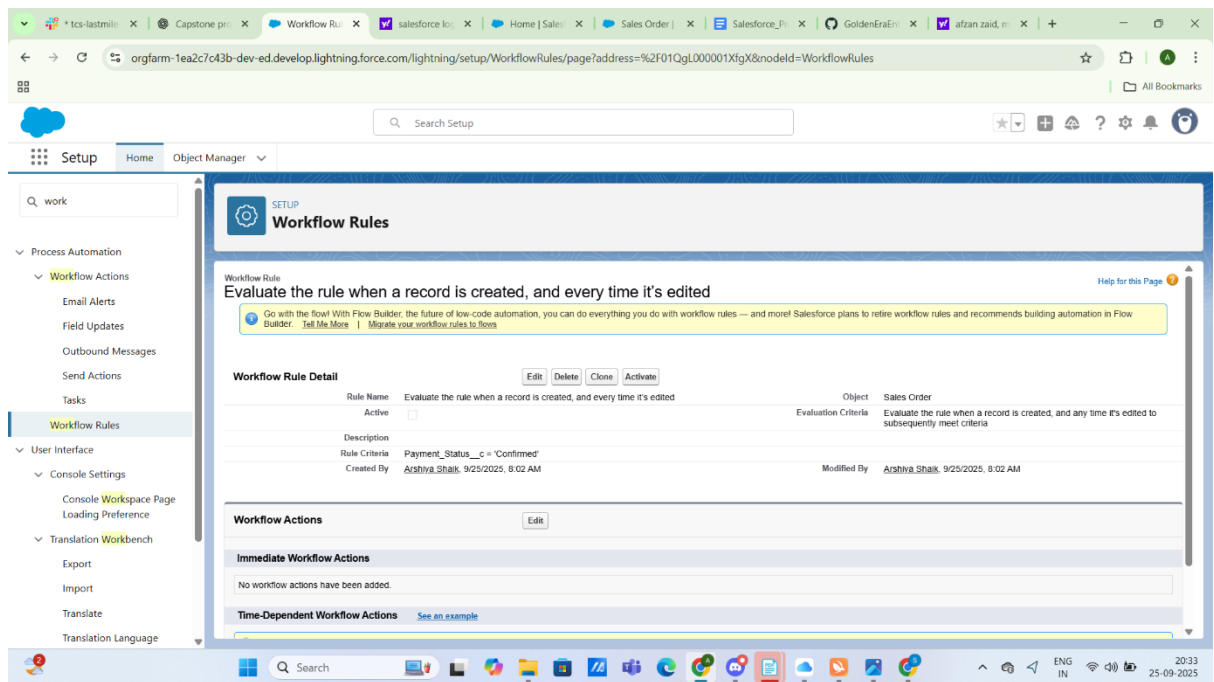
The rule is marked as 'Active' with a checkmark. The interface includes 'Edit' and 'Clone' buttons for the rule details and a 'Back to Bag' link.

### 2. Workflow Rule + Field Update

**Use Case:** When Sales Order is Confirmed, set Payment Status to Pending automatically.

- **Object:** Sales\_Order\_\_c
- **Workflow Rule Name:** WR\_SalesOrder\_StatusConfirmed
- **Criteria:** Order\_Status\_\_c = 'Confirmed'

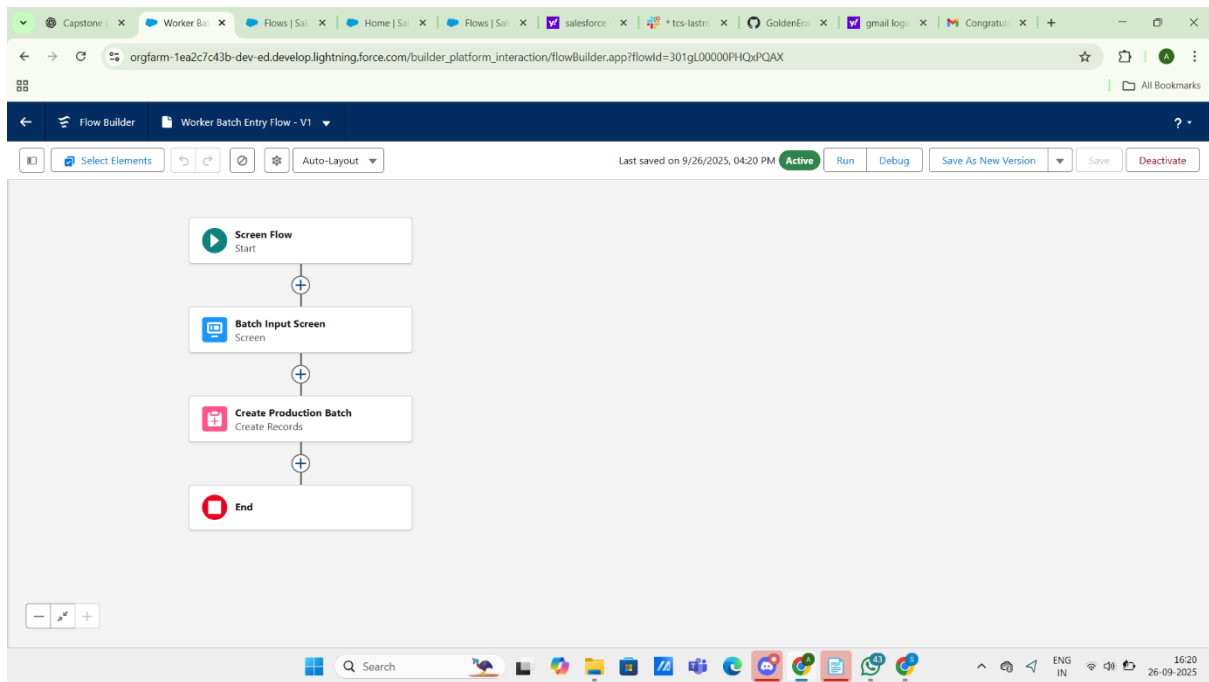
- **Immediate Action:** Field Update → Payment\_Status\_\_c = 'Pending'



### ◆ 3. Workflow Rule + Task

**Use Case:** Assign follow-up Task when a new Customer is created.

- **Object:** Customer\_\_c
- **Workflow Rule Name:** WR\_NewCustomer\_FollowUp
- **Criteria:** Created = True
- **Immediate Action:** Task
  - **Assigned To:** Sales Clerk
  - **Subject:** Verify Customer Details
  - **Due Date:** Rule Trigger Date + 2 Days
  - **Status:** Not Started
  - **Priority:** Normal



#### ◆ 4. Process Builder (Legacy Example)

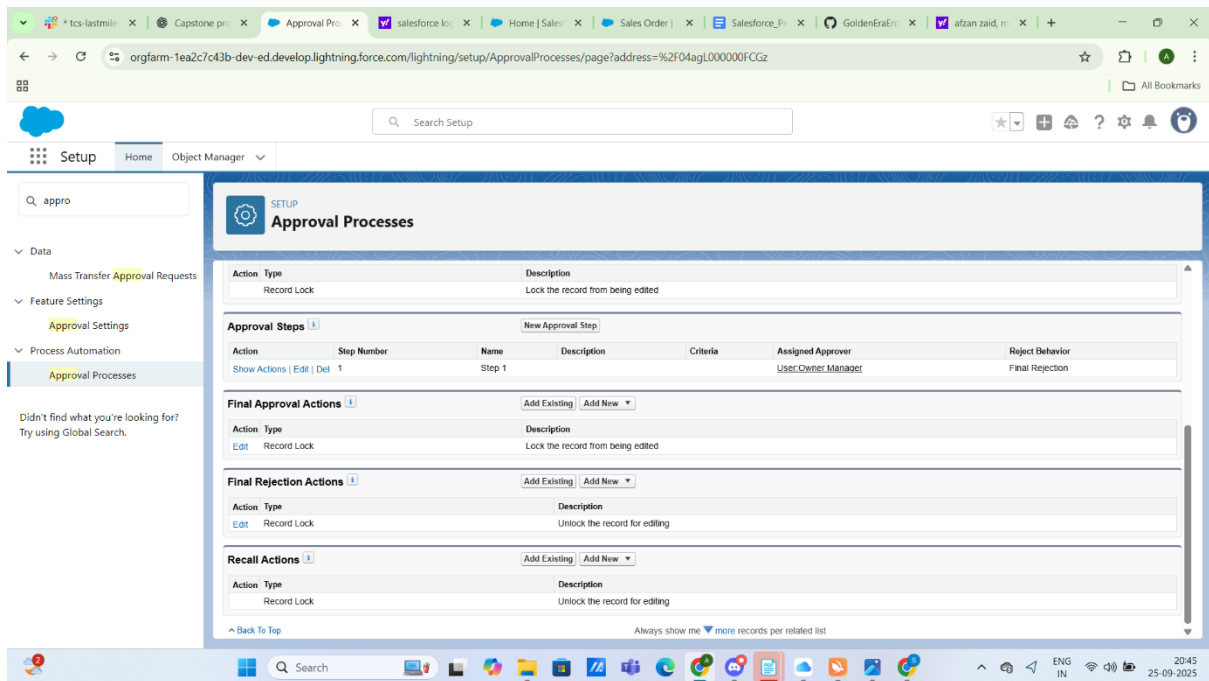
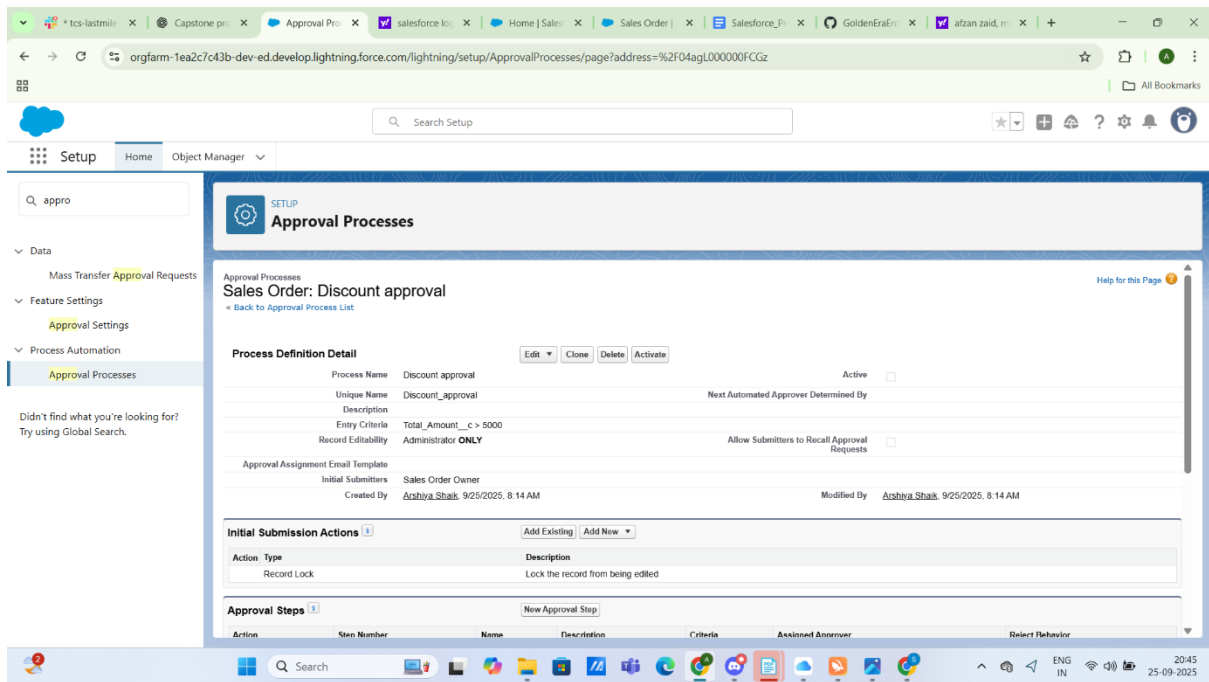
**Use Case:** When Payment Status is set to Paid → Update a field "Paid\_Date".

- **Object:** Sales\_Order\_\_c
- **Criteria:** Payment\_Status\_\_c = 'Paid'
- **Immediate Action:** Update Field → Paid\_Date\_\_c = TODAY()

#### ◆ 5. Approval Process

**Use Case:** Require Manager Approval for large Sales Orders (> 200 Bags).

- **Object:** Sales\_Order\_\_c
- **Entry Criteria:** Number\_of\_Bags\_\_c > 200
- **Approver:** Manager Role
- **Initial Submission Action:** Lock Record
- **Final Approval Action:** Send Confirmation Email (Email Alert).

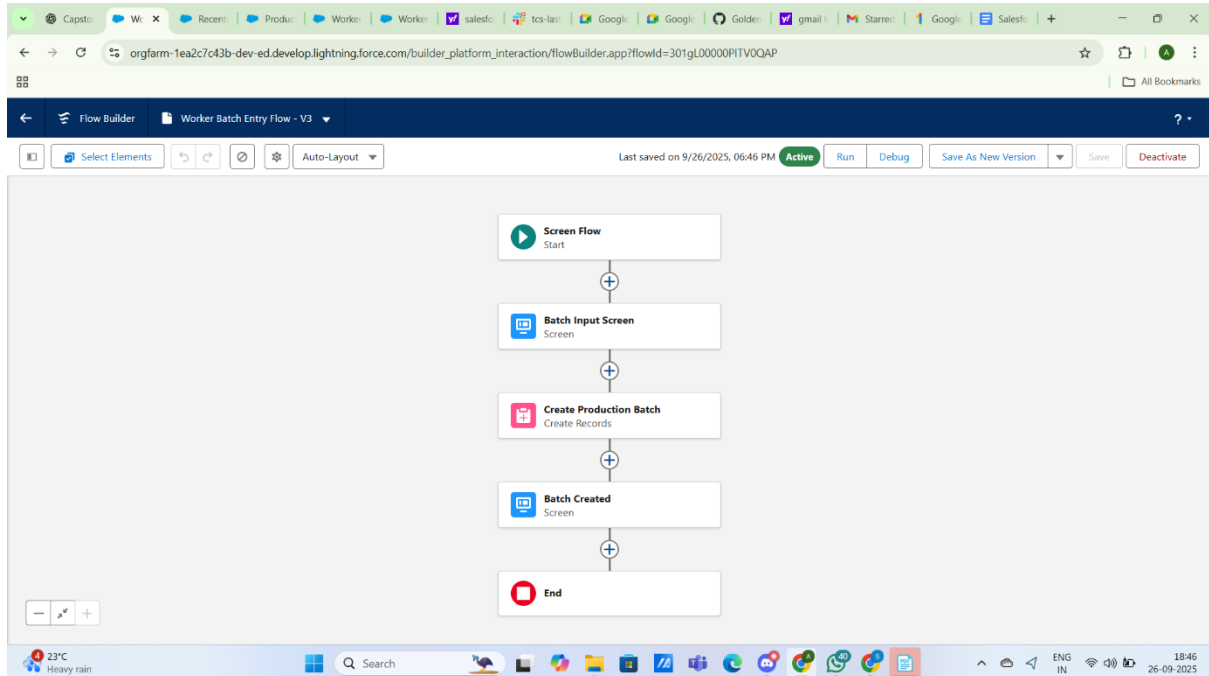


## ◆ 6. Flow Builder (Record-Triggered Flow)

**Use Case:** When Production Batch is marked Completed, auto-create Bag records.

- **Object:** Production\_Batch\_\_c
- **Trigger:** When record is updated → Batch\_Status\_\_c = 'Completed'
- **Actions:**
  - Calculate bags =  $\text{Quantity\_c} / 50$

- Loop → Create Bag\_\_c records with 50 packets each
- Handle remainder packets
- Update Total\_Bags\_Produced\_\_c




The screenshot shows the Salesforce Flow Record page for the 'Worker Batch Entry Flow'. The flow is 'Activated' and was last modified on 9/26/2025 at 3:50 AM. The flow owner is Arshiya Sh... The page displays the following details:

Information	
Flow Label	Worker Batch Entry Flow
Description	Flow for workers to log new production batches
Associated Record	
Created By	Arshiya Shaik, 9/26/2025, 3:34 AM
Last Modified	Arshiya Shaik, 9/26/2025, 3:50 AM
Category	
API Name	Worker_Batch_Entry_Flow
Flow Type	Screen Flow
Segment	
Created Date	9/26/2025, 3:34 AM
Last Modified Date	9/26/2025, 3:50 AM
Subcategory	

## 7. Email Alerts(No Need for My project)

**Use Case:** Send confirmation email when Sales Order is Confirmed.

- **Email Template:** ET\_SalesOrder\_Confirmation (with merge fields: Order Date, Bags, Amount).
- **Email Alert:** EA\_SalesOrder\_Confirmation
- **Triggered By:** Workflow Rule on Sales\_Order\_\_c (Status = Confirmed).
- **Recipient:** Customer email / Sales Clerk.

 *Screenshot:* Email Template + Email Alert + Workflow Action.

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## ◆ 8. Field Updates (Detailed Example)

**Use Case:** When Order Confirmed → Payment Status = Pending.

- Already covered in section 2 above.
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## ◆ 9. Tasks

**Use Case:** Assign Task to verify new Customer record.

- Already covered in section 3 above.
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## ◆ 10 Custom Notifications

**Use Case:** Notify Manager when a large Sales Order (> 500 Bags) is created.

- **Step 1:** Setup → Custom Notifications → New → LargeOrderNotification.
- **Step 2:** Flow → Record-Triggered on Sales\_Order\_\_c.
  - Entry Criteria: Number\_of\_Bags\_\_c > 500
  - Action: Send Custom Notification → Recipient = Manager → Title/Body = Order details.