

Phase 4 – Process Automation (Admin)

1. Introduction

In this phase, we configure automation tools in Salesforce such as **Validation Rules, Workflow Rules, Process Builder, Approval Processes, and Flow Builder**.

These tools make our Disaster Relief CRM smarter by:

- Preventing wrong entries (e.g., donation amount = 0).
- Sending auto-thank you emails.
- Updating linked records.
- Auto-assigning volunteers.
- Requiring approvals for large donations.

2. Validation Rules

Objective: Ensure clean data entry.

Steps:

1. Go to **Setup → Object Manager → Donation → Validation Rules → New**.
2. Rule Name: Check_Amount.
3. Formula: `Amount__c <= 0`.
4. Error Message: *Donation amount must be greater than 0.*
5. Save.

Donation Validation Rule

[Back to Donation](#)

[Help for this Page](#)

Validation Rule Detail

Edit

Clone

Rule Name	Prevent_negative_or_zero_donations	Active	✓
Error Condition Formula	Donation_Amount__c <= 0	Error Location	Top of Page
Error Message	Donation amount must be greater than zero		
Description			
Created By	Chinmay Choudhari, 9/18/2025, 6:24 AM	Modified By	Chinmay Choudhari, 9/18/2025, 6:30 AM

Edit

Clone

3. Workflow Rules

Objective: Automate alerts for donors.

Steps:

1. **Setup** → **Workflow Rules** → **New Rule**.
2. Select Object: **Donation__c**.
3. Rule Criteria: Status = “Received”.
4. Immediate Action → **Email Alert** → Use “Thank You for Donation” template.
5. Save & Activate.

SETUP

Workflow Rules

Workflow Rule

[Thank_You_Email_After_Donation](#)

[Help for this Page](#)

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder.

[Test Me](#)

More

[Migrate your workflow rules to flows](#)

Workflow Rule Detail

Edit

Clone

Deactivate

Rule Name	Thank_You_Email_After_Donation	Object	Donation
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created
Description			
Rule Criteria	Donation_Amount__c > 0		
Created By	Chinmay Choudhari, 9/18/2025, 7:09 AM	Modified By	Chinmay Choudhari, 9/18/2025, 9:34 AM

Edit

Workflow Actions

Edit

Immediate Workflow Actions

No workflow actions have been added.

Time-Dependent Workflow Actions

[See an example](#)

You cannot add new time triggers to an active rule.

[Deactivate This Rule](#)

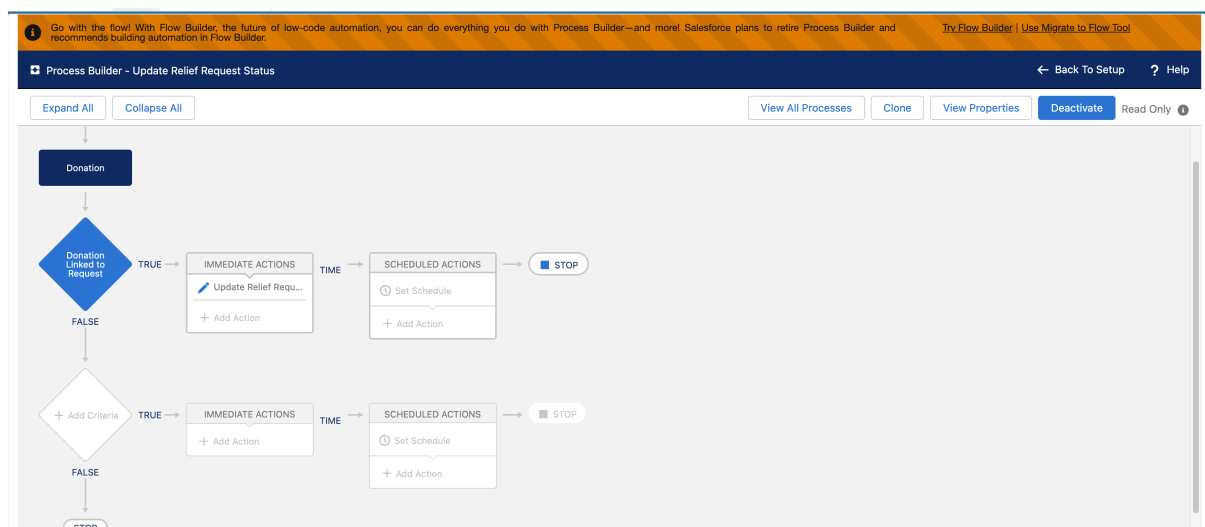
Edit

4. Process Builder

Objective: Auto-update related Relief Requests when donations are distributed.

Steps:

1. Go to **Setup** → **Process Builder** → **New**.
2. Process Name: **Update Relief Request**.
3. Object: **Donation__c** → Start when record is created/edited.
4. Criteria: [Status] = 'Distributed'.
5. Immediate Action → Update related **Relief_Request__c.Status = 'Fulfilled'**.
6. Save & Activate.



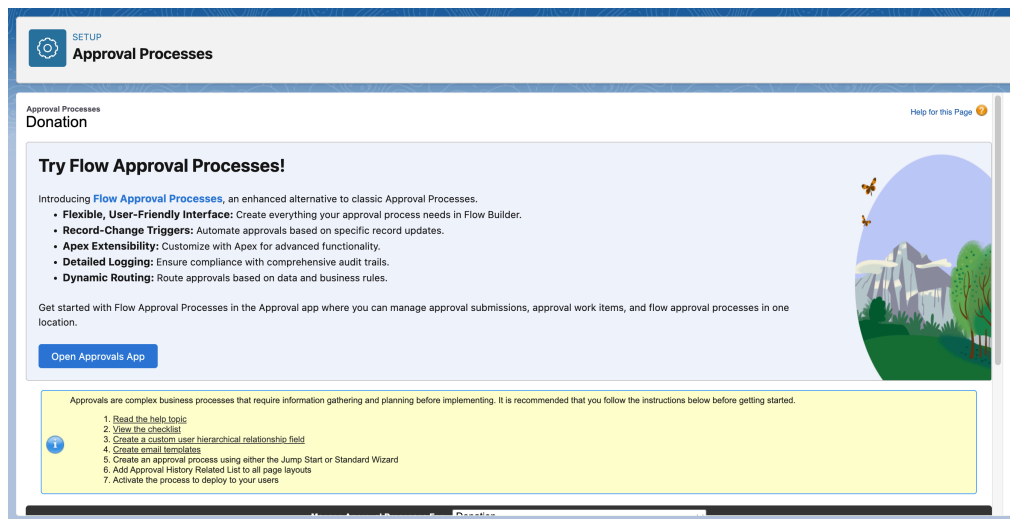
5. Approval Process

Objective: Require approval for high-value donations.

Steps:

1. **Setup** → **Approval Processes** → **New Approval Process** (for Donation__c).
2. Entry Criteria: Amount__c > 50000.
3. Initial Submitter: **Donation Owner**.
4. Approver: **Manager** (or your Admin user).

5. Final Step: Update Status = “Approved”.

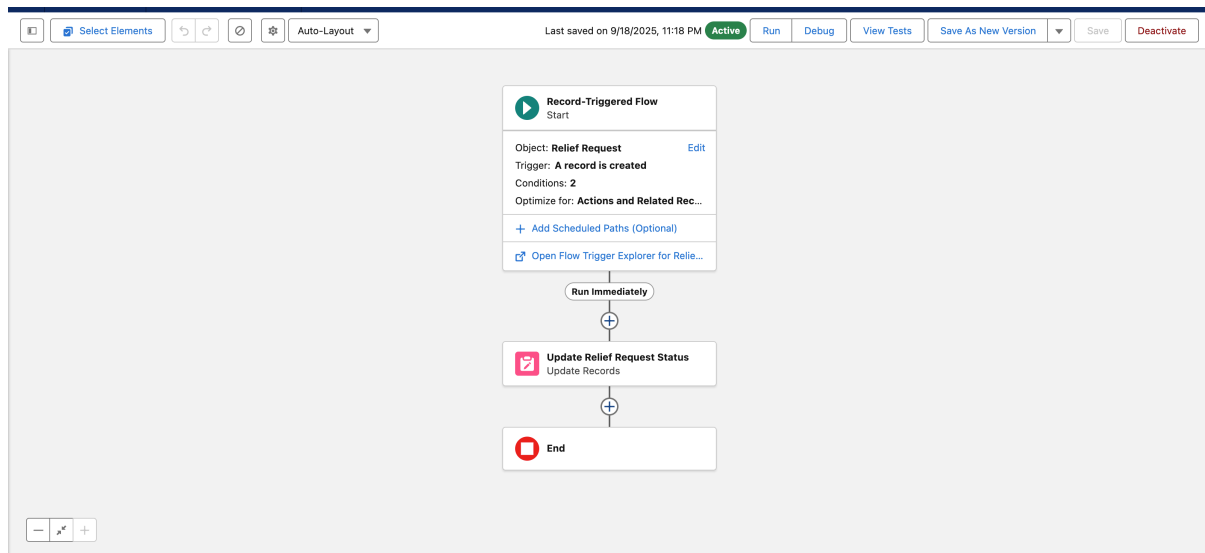


6. Flow Builder

Objective: Auto-assign a Volunteer when a Relief Request is created.

Steps:

1. Go to **Setup** → **Flow** → **New Flow** → **Record-Triggered Flow**.
2. Object: **Relief_Request__c**.
3. Trigger: When record is **Created**.
4. Add **Get Records**: Find available Volunteer (Availability__c = TRUE).
5. Add **Update Records**: Link Relief Request → Volunteer.
6. Save & Activate.



7. Notifications (Tasks & Alerts)

Objective: Notify users automatically.

Examples:

- Alert when a high-urgency Relief Request is created.
- Task assigned to Volunteer when Distribution is updated.



Screenshot to capture:

- Path: Flow Builder / Workflow Rule → Action: Notification or Task.
- Capture the configuration screen for notification.

8. Conclusion

Phase 4 brings **intelligence and automation** to our CRM.

- Validations stop bad data.
- Workflows + Process Builder automate updates.
- Approvals keep donations transparent.
- Flows handle complex auto-assignments.

This ensures faster disaster response with **minimal manual work**.