# Phase 4: Process Automation (Admin)

## 🎯 Objective

Automate order lifecycle processes in Salesforce (from creation → approval → fulfillment → delivery updates) to minimize manual dependency, ensure accuracy, and provide transparency for both retailers and wholesalers.

## 1. Validation Rules

Ensure data quality by preventing invalid or incomplete records.

- • Order Object
  - - Prevent “Dispatched” status if Delivery Date is blank.
  - - Ensure Retailer__c field is always filled when creating an Order.

**Validation Rules**
2 Items, Sorted by Rule Name

New

| RULE NAME | ERROR LOCATION | ERROR MESSAGE | ACTIVE | MODIFIED BY |
|---|---|---|---|---|
| VR_Order_Dispatched_requires_DeliveryDat | Top of Page | Please provide an Expected Delivery Date before marking the order as Dispatched. | ✓ | Aditi Sharma, 9/20/2025, 12:49 PM |
| VR_Order_Retailer_required | Top of Page | Retailer is required. | ✓ | Aditi Sharma, 9/20/2025, 12:54 PM |

- • Inventory Object
  - - Prevent Order creation if Available_Quantity < Ordered_Quantity.

📌 Example Rule:

> ***ISCHANGED(Status__c) && ISPICKVAL(Status__c, "Dispatched") && ISBLANK(Expected_Delivery_Date__c)***

## 2. Workflow Rules (for simple automation)

- • Send email alerts when:
  - - New order is placed (Retailer gets confirmation email).
  - - Order is marked “Delivered” (Retailer gets delivery notification).

## 3. Process Builder (complex record updates)

- • When an Order is created, auto-update Order Status = New.
- • When Order Status changes → Dispatched, create a Delivery record automatically.
- • When Payment_Status = Paid, update Finance_Approval__c = True.

## 4. Approval Process

- • Use for high-value orders (e.g., > $50,000).
- • Flow:
    - - Order Submitted → Goes to Sales Manager for approval.
    - - If approved → Status = “Processing”.
    - - If rejected → Status = “Rejected” with reason.

## 5. Flow Builder (main automation engine)

- Types Used:
    - • Record-Triggered Flow:
        - - On Order Creation → Assign Unique Order ID, send confirmation email/SMS.
        - - On Order Update → If status changes to “Dispatched”, notify Retailer.
    - • Screen Flow (Retailer Portal):
        - - Retailer selects products → Adds to Cart → Places Order.
    - • Scheduled Flow:
        - - Daily check for delayed orders → Notify Operations Manager.

- • Auto-launched Flow:
  - - Recalculate Inventory (Available = Available – Ordered) whenever a new order is confirmed.

## 6. Email Alerts & Notifications

- • Email Templates for:
  - - Order Confirmation.
  - - Order Dispatched.
  - - Delivery Completed.
- • Custom Notifications (in Salesforce app):
  - - Sales team alerted when new order is placed.
  - - Inventory Manager alerted if stock < reorder level.