

Phase 4: Process Automation & Business Logic

Overview

After establishing the **Org Setup & Configuration** in Phase 2 and designing the **Data Model & Relationships** in Phase 3, Phase 4 focused on embedding **automation and business logic** into the PlayStation Gaming CRM.

The main objective of this phase was to ensure that the system could automatically handle **repetitive business processes**, enforce **data integrity through validations**, and implement **approval workflows** where managerial intervention is required. This not only reduces manual workload but also improves the **efficiency, accuracy, and reliability** of the CRM.

Automation plays a key role in providing gamers with **timely updates**, ensuring that **support teams respond quickly**, and allowing managers to **maintain control over critical decisions** like discounts and high-cost repairs.

Activities Done

1. Workflow Rules

Workflow rules were used to implement **straightforward, rule-based automations** that run in the background whenever conditions are met.

- **Subscription Expiry Reminder:**
 - Automatically triggers an email notification to the gamer before their subscription expires.
 - Ensures gamers are aware in advance and can renew on time.
- **Repair Update Notification:**
 - Sends an email or in-app notification to gamers when the status of their repair request changes (e.g., *Received* → *In Progress* → *Completed*).
 - Keeps gamers informed without manual follow-ups.

2. Process Builder

Process Builder allowed us to automate **multi-step logic and updates** beyond simple workflows.

- **Auto Case Assignment:**
 - New support cases raised by gamers are automatically assigned to the *Support Agent* role.

- This eliminates the need for manual routing and ensures faster response times.
 - **Auto Field Updates:**
 - Subscription records are automatically updated to *Expired* once the End Date passes.
 - Removes dependency on manual monitoring and ensures accurate reporting.
-

3. Approval Processes

Approval processes introduced **managerial oversight** into business workflows.

- **Discount Approval:**
 - If a gamer requests a subscription discount, the request is routed to the *Marketing Manager* for approval.
 - Prevents unauthorized discounts and maintains consistency.
 - **Repair Cost Approval:**
 - Repair requests exceeding a predefined cost limit are sent to the *System Administrator* (Admin) for approval.
 - Ensures budget control and prevents unnecessary expenses.
-

4. Validation Rules

Validation rules were implemented to maintain **data accuracy and completeness**.

- **Mandatory Subscription Dates:**
 - Users cannot save a subscription record unless both the Start Date and End Date are filled.
 - Prevents incomplete records and improves reporting accuracy.
 - **Repair Completion Validation:**
 - A repair request cannot be marked as *Completed* unless a valid *Service Date* is entered.
 - Ensures that closed repairs always have complete and reliable information.
-

5. Flows

Flows provided **guided, interactive automation** to help users carry out tasks more efficiently.

- **New Gamer Onboarding Flow:**
 - Step-by-step process for creating a new gamer (Contact), assigning them a subscription, and linking their games.
 - Simplifies onboarding and reduces errors for new records.

- **Repair Logging Flow:**

- Guides support staff through the repair request creation process by prompting for required details.
- Ensures all necessary data is captured at the time of logging.

Outcome

At the end of Phase 4, the PlayStation Gaming CRM became **intelligent and automated** rather than just a static data storage system. Key achievements include:

- **Routine tasks automated** → Reduces manual work and ensures efficiency.
- **Business rules enforced** → Approvals and validations guarantee accuracy and accountability.
- **Improved gamer experience** → Gamers receive timely updates on subscriptions and repairs.
- **Operational efficiency increased** → Support and marketing teams can focus on important tasks instead of repetitive manual updates.

This phase successfully transformed the CRM into a **smart system** capable of handling business processes on its own. The environment is now ready for **Phase 5: Reports & Dashboards**, where structured data and automation will be converted into meaningful business insights.

The screenshot shows the Salesforce Setup interface for Workflow Rules. The left sidebar contains the Setup menu with 'Home' and 'Object Manager' options. The main content area is titled 'Workflow Rules' and includes a search bar, a 'Process Automation' section, and a 'Workflow Rules' section. The 'Workflow Rules' section displays a list of rules with columns for Action, Rule Name, Description, Object, and Active status. The rules listed are 'Repair_Status_Change_Notify' and 'Subscription_Expiry_Reminder'. A 'Quick Tips' box on the right provides links to 'Useful Sample Workflow Rule', 'Video Tutorial (English Only)', and 'Troubleshooting Workflow'.

Setup

Home Object Manager

workflow ru

Process Automation

Workflow Rules

Didn't find what you're looking for? Try using Global Search.

SETUP Workflow Rules

All Workflow Rules

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. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

Quick Tips

- [Useful Sample Workflow Rule](#)
- [Video Tutorial \(English Only\)](#)
- [Troubleshooting Workflow](#)

View: All Workflow Rules Create New View

Action	Rule Name	Description	Object	Active
Edit Del Deactivate	Repair_Status_Change_Notify		Repairs	✓
Edit Deactivate	Subscription_Expiry_Reminder	Send reminder email 7 days before subscription end date	Subscriptions	✓

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Q workflow ru

Process Automation

Workflow Rules

Didn't find what you're looking for?

Try using Global Search.

SETUP

Workflow Rules

Workflow Rule

Subscription_Expiry_Reminder

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. [Tell Me More](#) | [Migrate your workflow rules to Flow](#)

Workflow Rule Detail

Edit

Clone

Deactivate

Rule Name	Subscription_Expiry_Reminder	Object	Subscriptions
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	Send reminder email 7 days before subscription end date		
Rule Criteria	AND: NOT(ISBLANK(End_Date__c)); End_Date__c >= TODAY())		
Created By	Himanshu Kumar: 9/23/2025, 7:40 AM	Modified By	Himanshu Kumar: 9/23/2025, 7:56 AM

Workflow Actions


Edit

Immediate Workflow Actions

No workflow actions have been added.

Time-Dependent Workflow Actions

See an example

 7 Days After Subscriptions: End Date	Description
Type	Send expiry email to gamer
Email Alert	

You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

Q workflow ru

Process Automation

Workflow Rules

Didn't find what you're looking for?

Try using Global Search.

SETUP

Email Alerts

Email Alert

Send expiry email to gamer

Rules Using This Email Alert (1)

Approval Processes Using This Email Alert (0)

Entitlement Processes Using This Email Alert (0)

Help for this Page

Email Alert Detail

Edit

Delete

Clone

Description	Send expiry email to gamer	Email Template	Subscription_Expiry_Notice
Unique Name	Send_expiry_email_to_gamer	Object	Subscriptions
From Email Address	Current User's email address		
Recipients	User: Himanshu Admin Related Contact: Gamer		
Additional Emails			
Created By	Himanshu Kumar: 9/23/2025, 7:50 AM	Modified By	Himanshu Kumar: 9/23/2025, 7:50 AM

Edit

Delete

Clone

Rules Using This Email Alert

Rules Using This Email Alert Help

Action	Rule Name	Description	Object	Active
Edit / Deactivate	Subscription_Expiry_Reminder	Send reminder email 7 days before subscription end date	Subscriptions	<input checked="" type="checkbox"/>

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
-----------	---------	-------------	--------	--------

Back To Top

Always show me fewer / more records per related list



Search Setup



Setup Home Object Manager

Approval Process

Process Automation
Approval Processes

Didn't find what you're looking for?
Try using Global Search.

Approval Processes

Subscriptions

Help for this Page

Try Flow Approval Processes!

- Introducing **Flow Approval Processes**, an enhanced alternative to classic Approval Processes.
- Flexible, User-Friendly Interface:** Create everything your approval process needs in Flow Builder.
 - Record-Change Triggers:** Automate approvals based on specific record updates.
 - Apex Extensibility:** Customize with Apex for advanced functionality.
 - Detailed Logging:** Ensure compliance with comprehensive audit trails.
 - Dynamic Routing:** Route approvals based on data and business rules.

Get started with Flow Approval Processes in the Approval app where you can manage approval submissions, approval work items, and flow approval processes in one location.

Open Approval App

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

- Read the help topic.
- View the checklist.
- Create a workflow using hierarchical relationships field.
- Create email templates.
- Create an approval process using either the Jump Start or Standard Wizard.
- Add Approval History Related List for all page layouts.
- Activate the process to deploy to your users.

Manage Approval Processes For: Subscriptions

A listing of both active and inactive approval processes for Subscriptions is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

Active Approval Processes

Action	Process Order	Approval Process Name	Description
Edit Deactivate	1	Subscription Discount Approval	Approval process for discount requests on Subscriptions

Inactive Approval Processes



Search Setup



Setup Home Object Manager

Approval Process

Process Automation
Approval Processes

Didn't find what you're looking for?
Try using Global Search.

Approval Processes

Subscriptions: Subscription Discount Approval

Help for this Page

Process Definition Detail

Process Name	Subscription Discount Approval	Active	<input checked="" type="checkbox"/>
Initial Name	Subscription Discount Approval	Next automated approval determined by	
Description	Approval process for discount requests on Subscriptions		
Entry Criteria	Subscriptions: Discount Requested on Subscriptions		
Record Eligibility	Administrator ONLY	Allow Submitters to Re-approve Requests	<input type="checkbox"/>
Approval Assignment Email Template	Subscriptions Owner		
Created By	System Administrator	Created On	9/23/2020, 11:15 PM
		Modified By	System Administrator

Initial Submission Actions

Action	Type	Description
Edit Remove	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Set Approved Status/Process
Edit Remove	Email Alert	Notify Marketing Manager of new discount request

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Repeat Behavior
Show Actions Edit	1	Marketing Manager Approval Step	Step for Marketing Manager to approve subscription discount requests.		User: Sarah Matthews	Final Rejection

Final Approval Actions

Action	Type	Description
Edit Remove	Record Lock	Lock the record from being edited
Edit Remove	Email Alert	Subscription Discount Approved Alert
Edit Remove	Field Update	Set Approved Status
Edit Remove	Field Update	Set Status Approved

Final Rejection Actions

Action	Type	Description
Edit Remove	Record Lock	Unlock the record for editing
Edit Remove	Field Update	Set Status Rejected
Edit Remove	Field Update	Reset Discount Requested
Edit Remove	Email Alert	Subscription Discount Rejected Alert

Revoke Actions

Action	Type	Description
Edit Remove	Record Lock	Unlock the record for editing

[Back To Top](#)

Always show the [Name](#) & [View](#) more records per related list

PAO

Q Search Setup

☆

+

🔍

?

🔔

👤

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Subscriptions

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Validation Rules

1 Items. Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Mandatory_Dates	Top of Page	Error Detected	✓	Himanshu Kumar, 9/24/2025, 12:59 AM

PAO

Q Search Setup

☆

+

🔍

?

🔔

👤

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Subscriptions

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Subscriptions Validation Rule

Back to Subscriptions

Help for this Page

Validation Rule Detail

Edit

Close

Rule Name	Mandatory_Dates	Active	✓
Error Condition Formula	OR(ISBLANK(Start_Date__c), ISBLANK(End_Date__c))		
Error Message	Error Detected	Error Location	Top of Page
Description	Prevent saving Subscription unless Start Date and End Date are provided.		
Created By	Himanshu Kumar, 9/24/2025, 12:59 AM	Modified By	Himanshu Kumar, 9/24/2025, 12:59 AM

Edit

Close

PAO

Q Search Setup

☆

+

🔍

?

🔔

👤

Setup

Home

Object Manager

Q Flows

SETUP

Flows

Flow Trigger Explorer

New Flow

Flow Definitions

All Flows

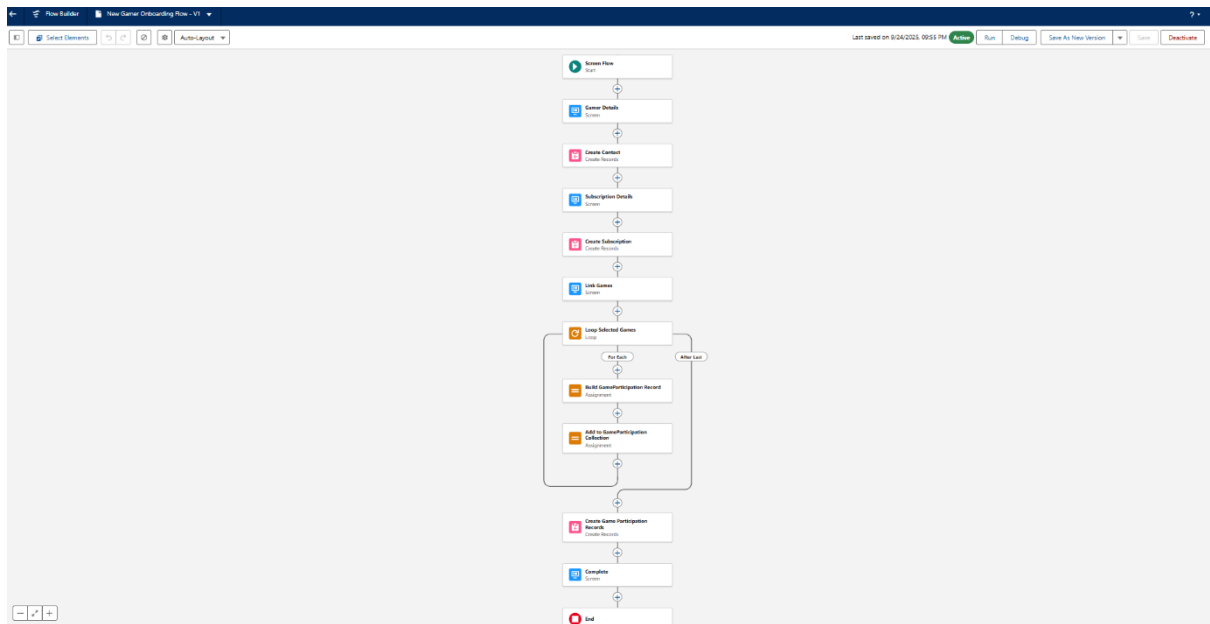
50+ Items • Sorted by Last Modified Date • Filtered by All flow definitions • Updated a few seconds ago

⚙️

🔍

⌵

Flow Label	Process Type	Active	Template	Package State	Packag...	Last Modified By	Last Modified Date
New Gamer Onboarding Flow	Screen Flow	✓	❑	Unmanaged		Himanshu Kumar	9/24/2025, 9:25 AM
Auto Expire Subscriptions	Autolaunched Flow	✓	❑	Unmanaged		Himanshu Kumar	9/23/2025, 10:55 AM



Flow Builder - New Gamer Onboarding Flow - V1

Last saved on 9/24/2025, 09:55 PM

Run Debug Save As New Version Cancel Deactivate

Edit Screen

Preview Size: Large

Components

Search components...

- Input (53)
- Action Button
- Add Attendees
- Address
- Call Script
- Cancel Appointment
- Checkbox
- Checkbox Group
- Choice Lookup
- Currency
- Data Table
- Date
- Date & Time
- Dependent Picklists
- Display Image
- Email
- Enhanced Message
- File Upload

Get more on the AppExchange

Fields

New Gamer Onboarding Flow

*First Name

*Last Name

Email

Screen Properties

Properties

* Label:

* API Name:

Description:

Stage:

> Configure Header

> Configure Footer

> Configure Screen Actions