

Phase 4 – Process Automation (Admin)

Process Automation in Salesforce streamlines business operations, reduces manual effort, and ensures data consistency. This phase focuses on building robust, real-time solutions using Salesforce’s native automation tools.

1. Validation Rules

Purpose

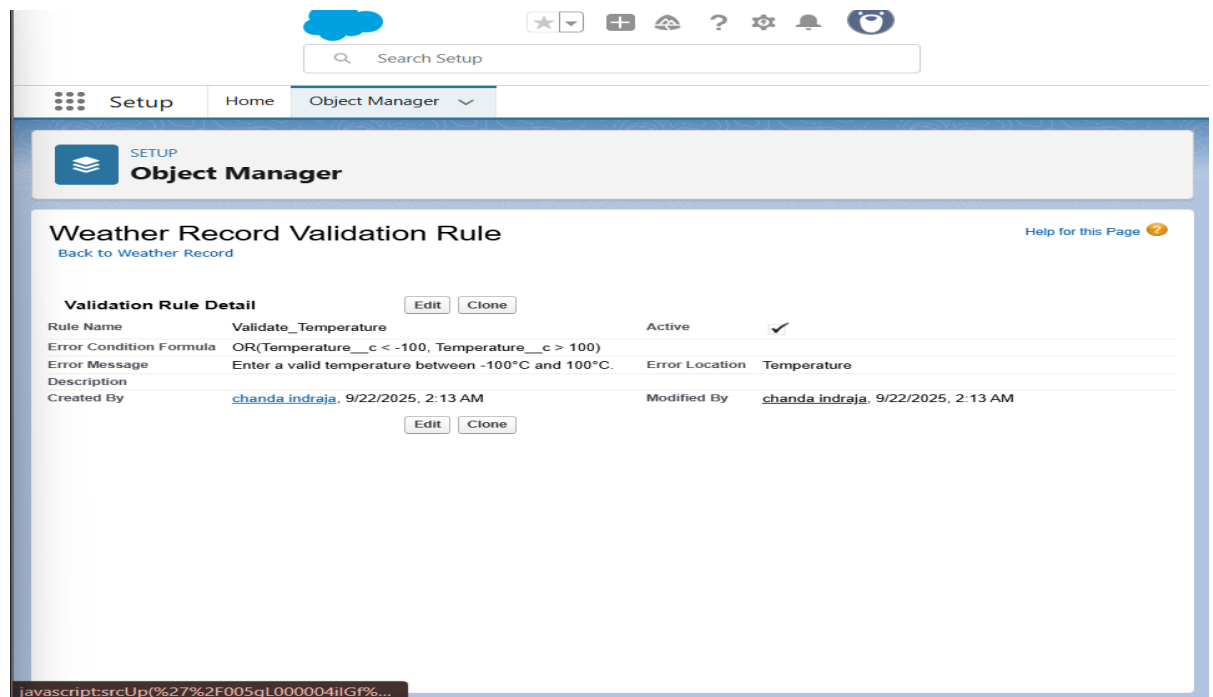
Validation Rules enforce data quality by preventing a record from being saved if it fails specified business criteria. They run whenever a record is created or updated—via the UI, API, Data Loader, or automation—ensuring that only complete and correct data enters Salesforce.

Key Benefits

- **Data Integrity:** Stops inaccurate or incomplete records before they impact reports or dashboards.
- **Compliance:** Enforces regulatory or internal policies (e.g., mandatory fields, date limits).
- **User Guidance:** Provides immediate, actionable error messages to end users.

Real-Time:

Scenario: Sales reps must set the Opportunity **Close Date** to today or a future date.
Validation Formula: `CloseDate < TODAY()`



2. Workflow Rules

Purpose

Workflow Rules automate standard internal processes, allowing Salesforce to perform actions automatically when specific criteria are met.

They help reduce manual effort, improve response time, and ensure consistent business operations.

Key Benefits

- **Efficiency:** Automates routine tasks like sending emails or updating fields, freeing users to focus on high-value work.
- **Consistency:** Ensures that business rules are applied uniformly across all records.
- **Scalability:** Handles large volumes of records with minimal administrative overhead.

The screenshot displays the Salesforce Setup interface for Workflow Rules. The left sidebar shows the navigation menu with 'Workflow Rules' highlighted. The main content area shows the configuration for a specific workflow rule.

Workflow Rule Detail

Field	Value
Rule Name	Severe_Weather_Email_Alert
Object	Weather Record
Active	<input checked="" type="checkbox"/>
Evaluation Criteria	Evaluate the rule when a record is created, and every time it's edited
Description	
Rule Criteria	Weather Record: Severe Weather EQUALS TRUE
Created By	chanda.indraja, 9/22/2025, 2:34 AM
Modified By	chanda.indraja, 9/22/2025, 2:38 AM

Workflow Actions

Immediate Workflow Actions

Type	Description
Email Alert	Send Severe Weather Email to Weather Managers

Time-Dependent Workflow Actions [See an example](#)

Message: You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited". [Change Evaluation Criteria](#)

Edit Rule High Value Opportunity Help for this Page ?

Step 3: Specify Workflow Actions Step 3 of 3 Done

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria: (Opportunity: Stage NOT EQUAL TO Closed Won) AND (Opportunity: Amount GREATER THAN 1,000,000)
 Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

Action	Type	Description
Edit Remove	Email Alert	Notify Account Team stating that a new high value opportunity has been created
Edit Remove	Email Alert	Notify Executive Committee
Edit Remove	Field Update	Change Probability to 20%
Edit Remove	Outbound Message	Update Marketing Systems

[Add Workflow Action](#)

Time-Dependent Workflow Actions [See an example](#)

14 Days Before Opportunity: Close Date [Edit | Delete](#)

Action	Type	Description
Edit Remove	Task	Opportunity Owner should follow up with customer

[Add Workflow Action](#)

7 Days Before Opportunity: Close Date [Edit | Delete](#)

Action	Type	Description
Edit Remove	Task	Sales Manager should contact the account
Edit Remove	Field Update	Flag for executive involvement

[Add Workflow Action](#)

[Add Time Trigger](#)

3. Process Builder

Purpose

Process Builder allows administrators to build complex, multi-step automation in Salesforce without code.

It supports multiple **if/then** branches and can call **Flows, Apex classes, or other processes**, enabling powerful end-to-end automation.

Real-Time Business Example – Rain Alert Level

Scenario: When a Weather Record indicates a high probability of rain, the system automatically sets the Alert Level to “High.”

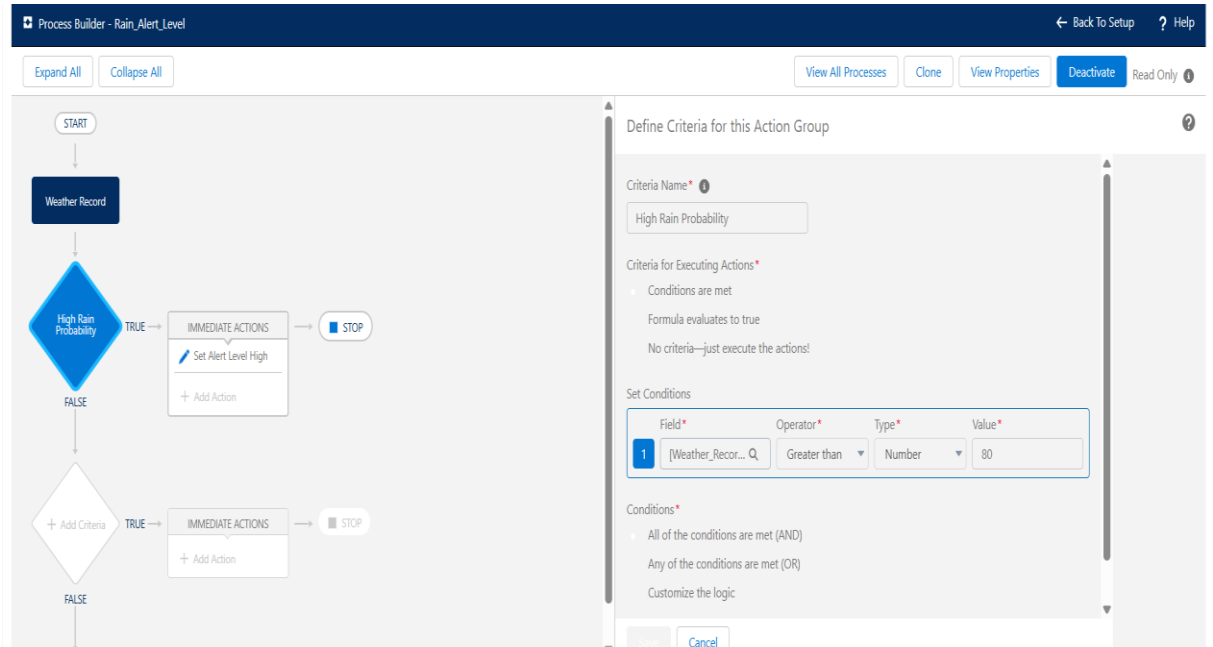
Key Configuration :

- **Object:** Weather Record
- **Criteria Name:** High Rain Probability
- **Condition:** [Weather_Record__c].Rain_Probability__c > 80
- **Immediate Action:** Update the Alert Level field to “High”

Core Features

- **Multiple Criteria Nodes:** Create separate decision branches for different conditions (e.g., Moderate or Low Rain Probability)

- **Immediate & Scheduled Actions:** Trigger field updates, email alerts, tasks, or invoke flows.
- **Integration Options:** Call an Apex class or launch an auto-launched flow for advanced logic.



The screenshot shows the Salesforce Lightning interface for a record named "City Hyderabad". The record is owned by "chanda.indraja". The details section shows the following fields:

Field	Value
City Name	Hyderabad
Country	India
Latitude	17.385000
Longitude	78.486700
Created By	chanda.indraja, 9/22/2025, 3:36 AM
Last Modified By	chanda.indraja, 9/22/2025, 3:36 AM

The "Activity" section shows a list of activities. The filters are set to "All time", "All activities", and "All types". The "Upcoming & Overdue" section shows "No activities to show. Get started by sending an email, scheduling a task, and more." and "No past activity. Past meetings and tasks marked as done show up here."

4. Approval Process

Purpose

An Approval Process in Salesforce automates the routing of records to one or more users for review and sign-off.

It ensures that critical changes—such as pricing overrides, major discounts, or severe weather alerts—are properly authorized before finalization.

Real-Time Example – Severe Weather Approval

Business Requirement: When a Weather Record indicates **Severe Weather = TRUE**, it must be approved by the designated approver before any updates are allowed.

Key Configuration:

- **Process Name:** Severe_Weather_Approval
- **Entry Criteria:** Weather_Record__c.Severe_Weather__c = TRUE
- **Initial Submitter:** City Owner
- **Record Editability:** Administrator ONLY during approval
- **Approval Assignment Email Template:** Severe Weather Alert

Key Features

- **Record Locking:** Prevents edits while a record is under review.
- **Multi-Step Approvals:** Add sequential or parallel approval steps.
- **Automated Field Updates:** Update status fields (Pending, Approved, Rejected) automatically.
- **Notifications:** Email alerts to approvers and submitters.
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The screenshot shows the Salesforce Setup interface for the 'Severe_Weather_Approval' process. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Approval Processes' and shows the details for the 'Weather Record: Severe_Weather_Approval' process. The process is currently active and was created by chanda.indraja on 9/22/2025 at 3:58 AM. The process definition details include the process name, unique name, description, entry criteria (Weather_Record: Severe Weather EQUALS TRUE), record editability (Administrator ONLY), approval assignment email template (Severe Weather Alert), and initial submitters (City Owner). The initial submission actions table lists four actions: Record Lock, Field Update (Update_Status_Pending), Field Update (Update_Status_NotSubmitted), and Field Update (Update_Status_Rejected). The approval steps table shows a single step with the name 'Step 1', description 'Step 1', criteria, assigned approver 'User:chanda.indraja', and reject behavior 'Final Rejection'.

Action	Type	Description
Record Lock	Record Lock	Lock the record from being edited
Field Update	Field Update	Update_Status_Pending
Field Update	Field Update	Update_Status_NotSubmitted
Field Update	Field Update	Update_Status_Approved
Field Update	Field Update	Update_Status_Rejected

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Step 1	1	Step 1			User:chanda.indraja	Final Rejection

5. Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)

Purpose:

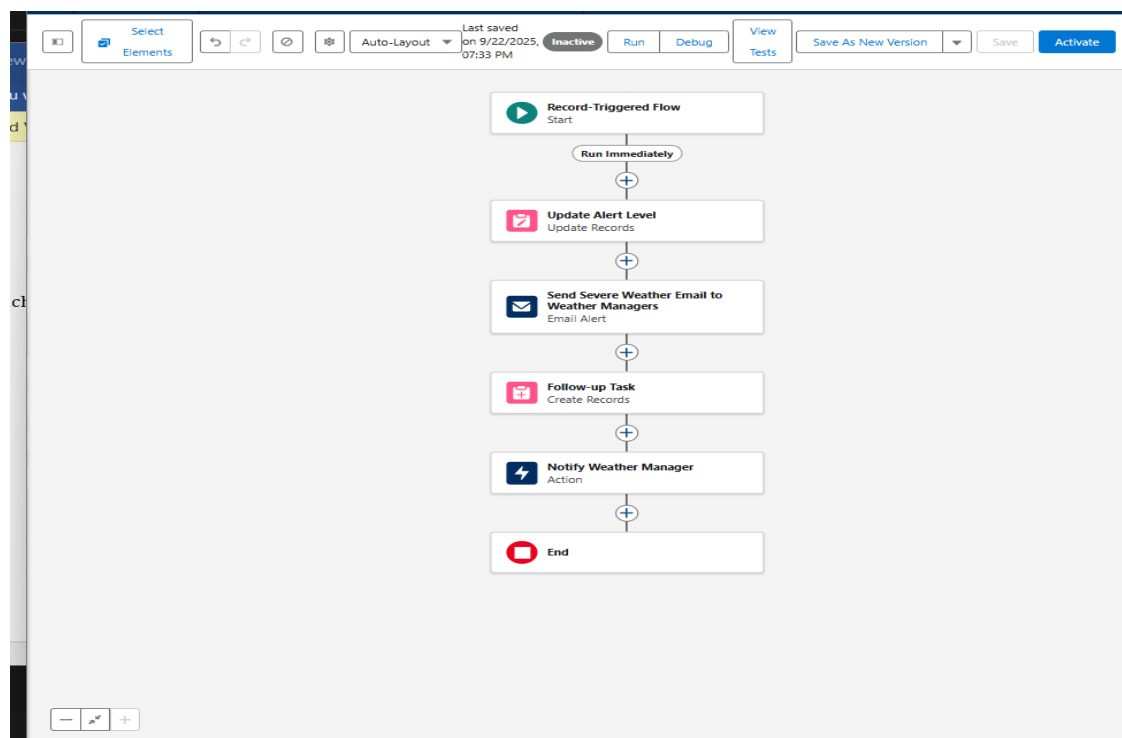
Flow Builder lets you automate business processes without code. It's flexible and can handle complex logic.

Types of Flows & Examples:

1. **Screen Flow** – Guides users step-by-step through a task.
Example: Wizard to create a Case.
2. **Record-Triggered Flow** – Runs automatically when a record is created or updated.
Example: Assign tasks when a new Lead is added.
3. **Scheduled Flow** – Runs at a specified time.
Example: Send monthly renewal reminders.
4. **Auto-Launched Flow** – Runs in the background, often triggered by another process.
Example: Update child records when a parent record changes..

Key Features:

- Automate tasks across Salesforce.
- Send **email notifications** to users.
- Update records, create new records, and perform calculations.
- Conditional logic and loops supported.



6.Email Alerts

Purpose:

Automatically send email notifications based on specific actions or criteria, without manual intervention.

Key Features:

- Uses **Email Templates** (Classic or Lightning) to standardize messages.
- Can be triggered by **Workflow Rules**, **Process Builder**, or **Flow Builder**.
- Can notify multiple recipients: Users, Roles, Contacts, or email addresses.
- Supports **dynamic fields** to personalize emails (e.g., customer name, order number).
- Works with **approvals**, **case updates**, **lead assignment**, and more.

Real-Time Examples:

- Notify a customer when an order is shipped.
- Alert a manager when a high-value opportunity is created.
- Send reminders for overdue tasks or approvals.

The screenshot shows the Salesforce 'Classic Email Templates' setup page. The left sidebar contains a navigation menu with options like 'Email', 'Apex Exception Email', 'Authorized Email Domains', 'Classic Email Templates' (selected), 'Classic Letterheads', 'Compliance BCC Email', 'DKIM Keys', 'Delete Attachments Sent as Links', 'Deliverability', 'Email Address', 'Internationalization', 'Email Attachments', 'Email Delivery Settings', 'Email Domain Filters', 'Email Relays', 'Email Footers', 'Email to Salesforce', and 'Enhanced Email'. The main content area is titled 'Classic Email Templates' and shows details for a 'Text Email Template' named 'Severe Weather Alert'. The template is marked as 'Unfiled Public Classic Email Template' and 'Available For Use'. The 'Email Template Detail' table lists the template name, unique name, encoding, author, description, and creation/modification dates. Below the table, the 'Email Template' section shows the subject line 'Severe Weather Alert for {!Weather_Record__c.Name}' and a 'Plain Text Preview' of the email content, which includes a greeting and weather details for a specific record.

Classic Email Templates

Text Email Template
Severe Weather Alert

Preview your email template below.

Email Template Detail [Edit] [Delete] [Clone]

Email Templates from Salesforce	Unfiled Public Classic Email Templates
Email Template Name	Severe Weather Alert
Template Unique Name	Severe_Weather_Alert
Encoding	Unicode (UTF-8)
Author	chanda indraja [Change]
Description	Email template to notify Weather Managers about severe weather
Created By	chanda indraja, 9/22/2025, 2:20 AM
Modified By	chanda indraja, 9/22/2025, 2:20 AM

[Edit] [Delete] [Clone]

Email Template [Send Test and Verify Merge Fields]

Subject ⚠ Severe Weather Alert for {!Weather_Record__c.Name}

Plain Text Preview

Hello Weather Manager,

Severe weather has been reported for the following weather record: {!Weather_Record__c.Name}. Details:

- Temperature: {!Weather_Record__c.Temperature__c} °C
- Humidity: {!Weather_Record__c.Humidity__c} %

7.Field Updates

Purpose:

- Maintain data accuracy and consistency.
- Save user time by reducing manual updates.
- Trigger changes that influence other automation (workflows, flows, approval processes).

Use Cases:

- **Opportunity Management:** Automatically update the **Opportunity Stage** to “Closed Lost” when the “Competitor” field is filled in.
- **Case Management:** Update a **Case Status** to “Escalated” when the case priority is set to “High.”
- **Lead Qualification:** Mark a **Lead Source** field to “Web” if the lead was created from a web form.

Benefits:

- Eliminates human errors in repetitive updates.
- Provides real-time record changes.
- Improves reporting accuracy.

8.Tasks

Definition:

Tasks are to-do items that Salesforce can automatically create for users when a specific trigger condition is met. These tasks help guide sales and service teams by ensuring they follow up on critical actions.

Purpose:

- Assign follow-up actions to users at the right time.
- Keep sales cycles moving and avoid missed opportunities.
- Standardize customer engagement processes.

Use Cases:

- **Lead Follow-Up:** When a new high-value lead is created, automatically assign a task for the sales rep to call within 24 hours.
- **Renewals:** When an opportunity is 30 days away from its close date, assign a task for the account manager to reach out to the client.
- **Customer Support:** When a case is reopened, create a task for a support agent to review it immediately.
- Reduces the risk of missed follow-ups.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, showing 'Process Automation' > 'Workflow Actions' > 'Tasks'. The main content area displays the 'Review Weather Record' task details. The task is assigned to 'User: SkyCast Admin' and has a status of 'Not Started'. The subject is 'Review Weather Record' and the unique name is 'Review_Weather_Record'. The due date is 'Weather Record: Created Date'. The task was created by 'chanda.indraja' on 9/22/2025 at 9:42 AM. Below the task details, there are sections for 'Rules Using This Task' and 'Approval Processes Using This Task', both of which are currently empty.

Task Details:

Workflow Task Detail			
Object	Weather Record		Status
Assigned To	User: SkyCast Admin		Priority
Subject	Review Weather Record		
Unique Name	Review_Weather_Record		
Due Date	Weather Record: Created Date		
Comments			
Created By	chanda.indraja, 9/22/2025, 9:42 AM	Modified By	chanda.indraja, 9/22/2025, 9:42 AM

Rules Using This Task: This task is currently not used by any rules.

Approval Processes Using This Task:

9. Custom Notifications

Purpose:

- Improve response time for urgent matters.
- Keep users informed without relying solely on emails.
- Provide flexibility in how users receive alerts (desktop, mobile).

Use Cases:

- **Sales Alerts:** Notify sales reps instantly when a “Hot Lead” is assigned to them.
- **Case Management:** Alert support managers when a VIP customer’s case is escalated.
- **Approvals:** Send a notification to a manager when a discount approval request is pending.